Product Training
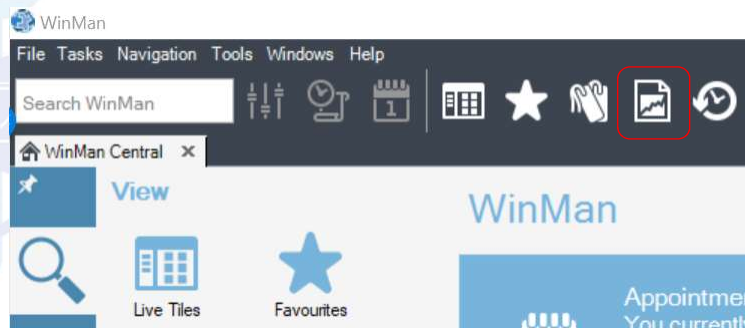## Printing Reports and Documents

Where "Lean" principles are considered common sense and are implemented with a passion!

winman
ADVANCED ERP SYSTEMS

Reports

Reports can be run directly from the report list. To access the report list click on the report icon located at the top of the screen as shown or select the Reports from the Tools menu..
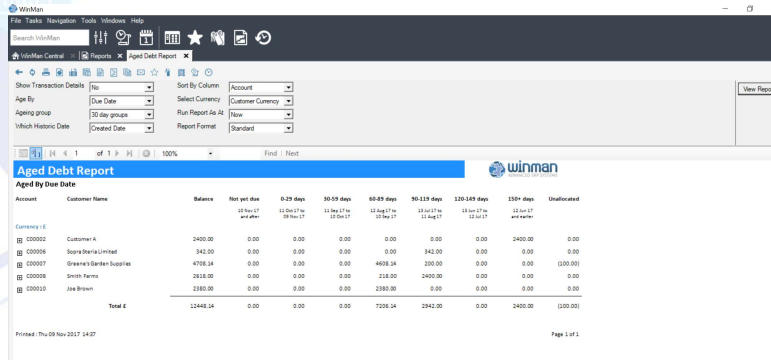
Reports

Once Reports are organised in folders. By default, they are grouped by function. Your implementation may change this structure to better suit your company if needed.
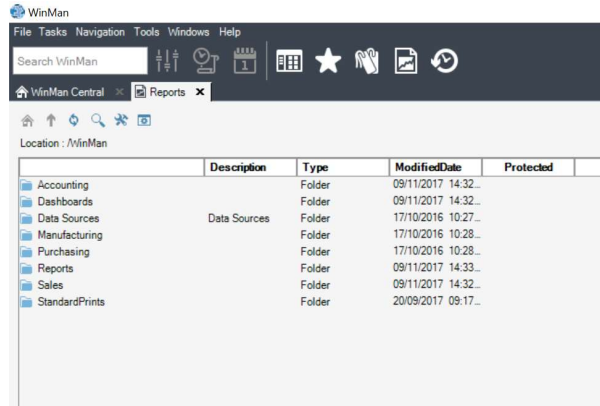
Reports

A report may work a little differently than others. For instance, it may require a customer number, a part number, date range, etc. There are however, similarities to how the functions surrounding the report work. Here is an Aged Debt report. Notice the plus sign next to the Customer ID number. Clicking on the plus sign will expand the report and give more detail for the line.
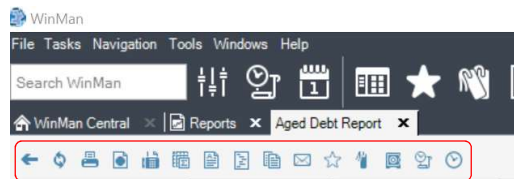
Reports

This screen shot show the result of clicking on the first plus sign.

Note the additional detail. This report will also allow us to drill down to the invoice by clicking on the invoice. You can tell it is a drill down because the cursor changes to a hand when it passes over the invoice number, just like a hyper-link in Internet Explorer. Multiple drill downs can exist on the same report, and can be configured by the system administrator.

Reports

Once you have run the report you can export it, mail it, fax it, convert it, etc. Most of the options are shown below and are self explanatory.


SYSTEM SETTING:
Reports have a default time-out 1 minute 40 seconds which is the time the report has to generate. If reports are require more time to run, and time-out errors occur when running a report, the time-out limit can be increased. Use the Reports system option Report Timeout (defaults to 100000 milliseconds) to increase the timeout period. Enable the option and set the value to the number of milliseconds that should be used.
NOTE: If there is an error while running the report, WinMan will be "frozen" until the timeout period has passed. Care should be taken with increases to this option
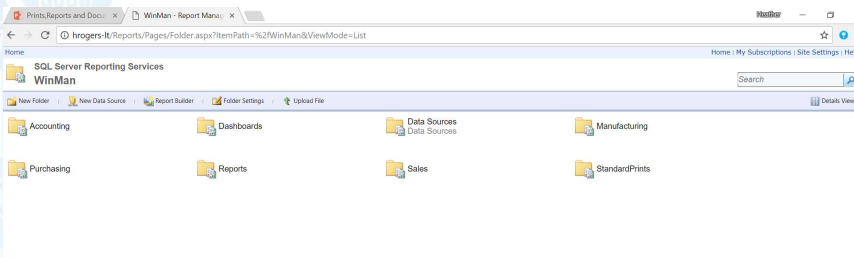
Reports

Subscriptions allow a report to be run on a schedule and emailed to specified recipients.
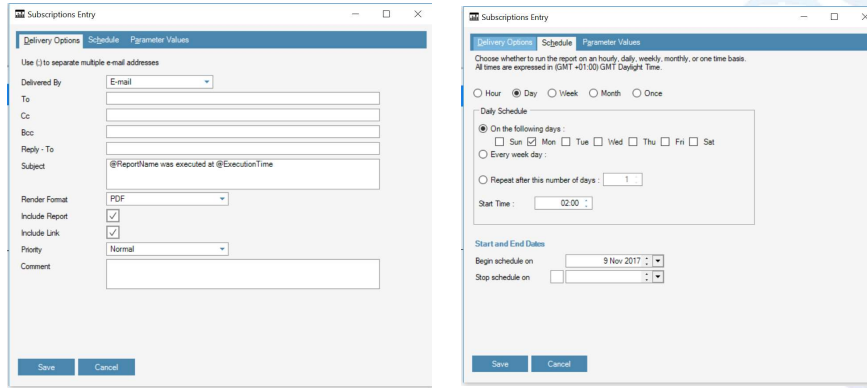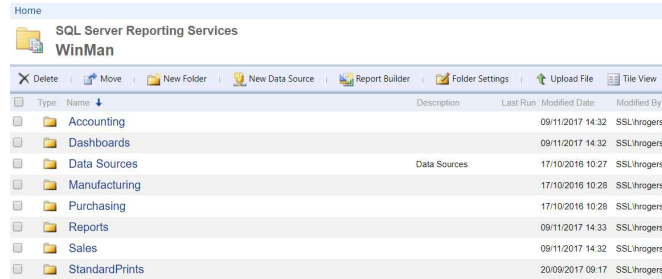

Reports

Reports can also be accessed outside of WinMan using an internet browser.

In the browser, type the SQL server name and "\Reports". If the SQL server name is WinMan you would enter WinMan\Reports.

Report Security

To set-up report security enter the Report Portal and select the Show Details icon on the header bar. Security can be set for a specific folder or a specific report. In the example below, security is set for a folder. However, to set security for a specific report, simply drill down to the report and follow the same steps.
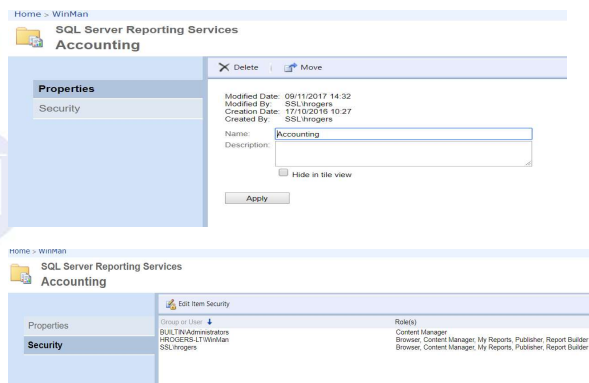

Report Security

Select the Edit icon for the folder that security is being set for and then select the Security Tab

Report Security

Click on the column heading Group or User. Grant access for users or user groups that have been setup in the Windows Domain Controller.
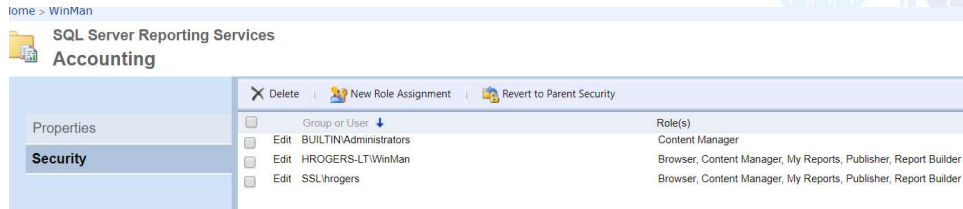
Prints

Prints are reports such as invoices, sales orders, picking slips, etc. Prints are typically used for an individual item where a report is for a larger data set. The available prints for the different areas of the system are shown in the print window on the bottom right hand side of the screen. The display window for the prints is the same one used for reports.
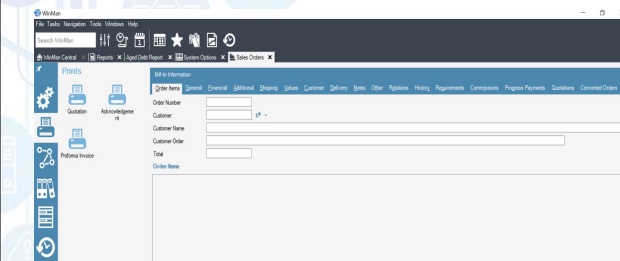
Right clicking on a "Print" or document will allow you to specify where and/or how you want the system to output the report.

Print Preferences

Prints that are sent out to customers or suppliers can have print preferences set up.

Print preferences can be set up for any standard print or custom print provided the print is a Print menu item in at least 1 module. (i.e. Quotation print in the Sales Orders module)

Print Preferences have a default that is set up in the System Options module on the Process Events Tab, in the Report Preferences section
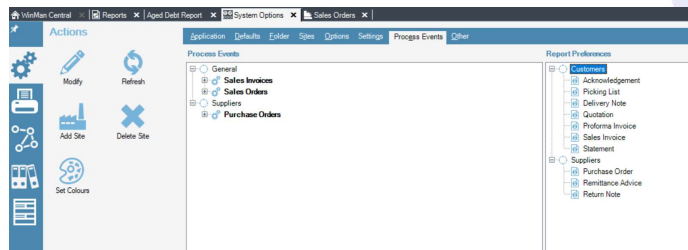
Print Preferences

Print Preferences

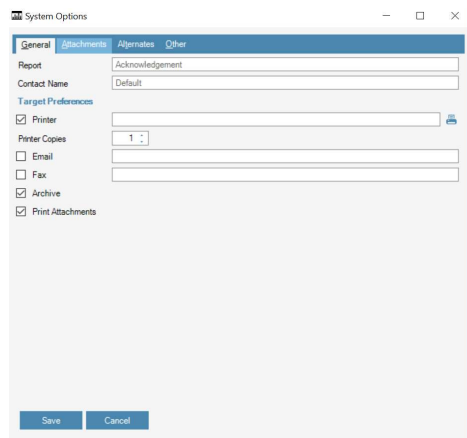Print Preferences set up for customers will have a setting in the customer module to change (See Customers documentation) and print preferences for suppliers will have a setting in the supplier module to change (See Suppliers documentation)

To add a Print Preference right click on either Customers or Suppliers and select Add.

Select the report and the default sending method. Any or all print methods can be selected.
Note: Archive will add a PDF copy of the print to the item (ie Sales Order) in the module the print was sent from (Sales Orders).

To add attachments use the attachment tab and right click in the area. Select the option Add and add any documents to be attached. This could be a terms and conditions document.

Attached Documents

WinMan allows documents to be attached to a current record. A document added to the example below will relate to the current customer. Any sort of document, drawing, or image/audio file may be attached. Note the list of existing documents. Key words may be added to search documents across multiple areas and screens. Often users use their names or a department as a key word.

- **Add Document** – Adds a document
- **New Document** – Allow a note to be attached as a document
- **Search** – Brings up a search window. Searches can be by title, date, keywords, etc.
- **Import Email** – Import an email from outlook

Documents tab