

Product Training

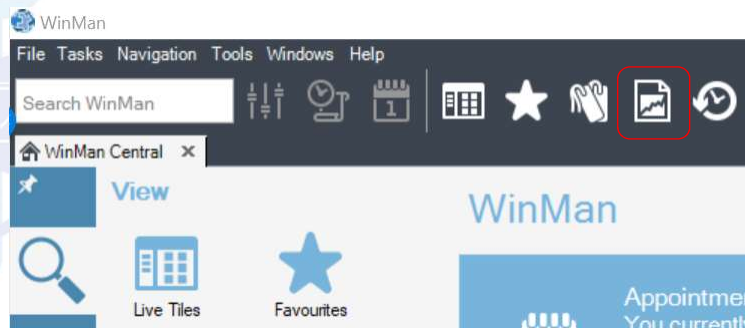
Printing Reports and Documents

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



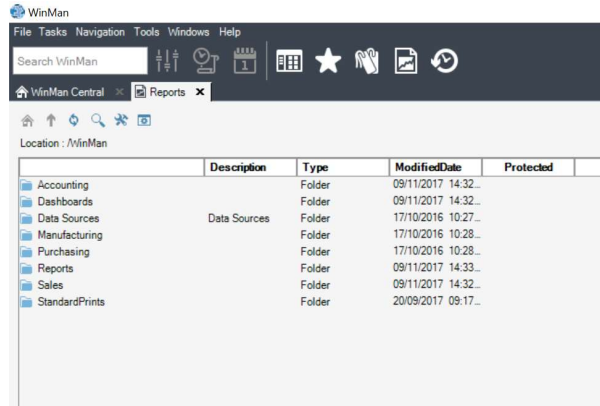
Reports

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..



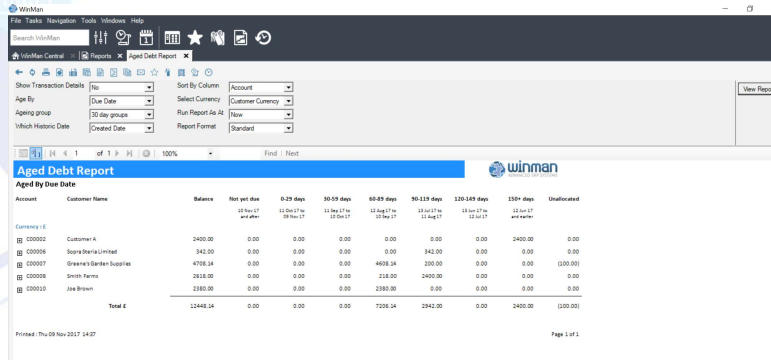
Reports

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

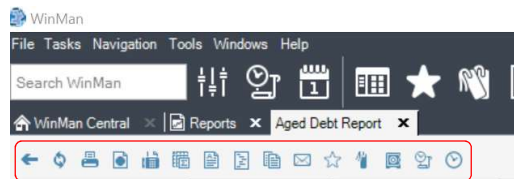
This screen shot show the result of clicking on the first plus sign.

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.

Account	Customer Name	Balance	Net per A/c	0-30 Days	31-60 Days	61-90 Days	91-120 Days	121-180 Days	181-360 Days	Unallocated
000002	Customer A	400.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	400.00
	04 Nov 16		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	14 Nov 16		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	14 Nov 17		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	18 Nov 17		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Customer Total	400.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	400.00
000004	Supplier's Invoice	342.00	0.00	0.00	0.00	0.00	342.00	0.00	0.00	0.00
000007	Inventory/Stocks/Receipts	4728.14	0.00	0.00	0.00	4686.14	200.00	0.00	0.00	1000.00
000008	Receipts/Notes	2042.00	0.00	0.00	0.00	214.00	2400.00	0.00	0.00	0.00
000010	Job Sheet	1380.00	0.00	0.00	0.00	1380.00	0.00	0.00	0.00	0.00
	Total	11448.14	0.00	0.00	0.00	7226.14	2942.00	0.00	0.00	1000.00

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.

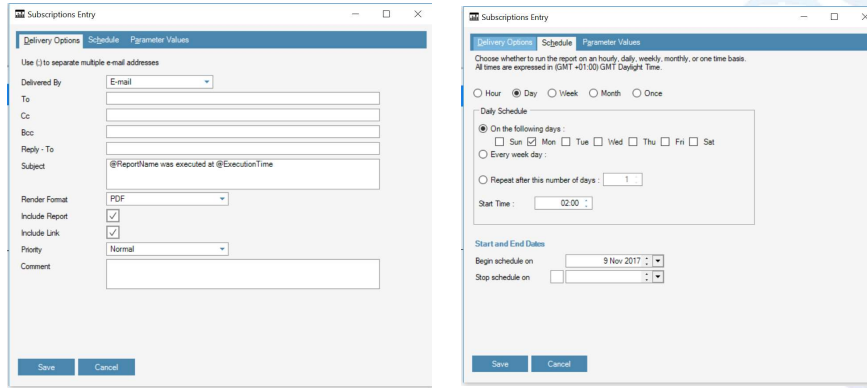


SYSTEM SETTING:

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

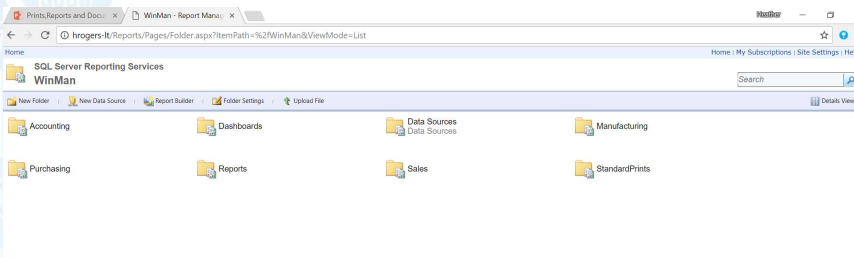
Subscriptions allow a report to be run on a schedule and emailed to specified recipients.



Reports

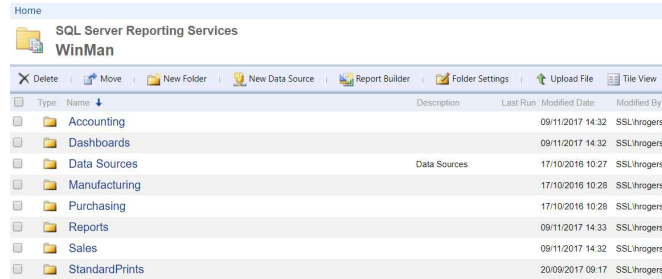
Reports can also be accessed outside of WinMan using an internet browser.

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.

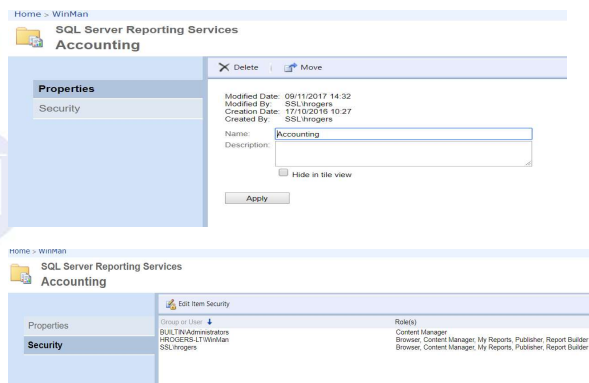


Home > SQL Server Reporting Services > WinMan

Type	Name	Description	Last Run	Modified Date	Modified By
Folder	Accounting		09/11/2017 14:32	09/11/2017 14:32	SSL/hrogers
Folder	Dashboards		09/11/2017 14:32	09/11/2017 14:32	SSL/hrogers
Folder	Data Sources	Data Sources	17/10/2016 10:27	17/10/2016 10:27	SSL/hrogers
Folder	Manufacturing		17/10/2016 10:28	17/10/2016 10:28	SSL/hrogers
Folder	Purchasing		17/10/2016 10:28	17/10/2016 10:28	SSL/hrogers
Folder	Reports		09/11/2017 14:33	09/11/2017 14:33	SSL/hrogers
Folder	Sales		09/11/2017 14:32	09/11/2017 14:32	SSL/hrogers
Folder	StandardPrints		20/09/2017 09:17	20/09/2017 09:17	SSL/hrogers

Report Security

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



Home > WinMan > SQL Server Reporting Services > Accounting

Properties

Security

Modified Date: 09/11/2017 14:32
Modified By: SSL/hrogers
Creation Date: 17/10/2016 10:27
Created By: SSL/hrogers

Name: Accounting

Description:

Hide in the view

Apply

Home > WinMan > SQL Server Reporting Services > Accounting

Edit Item Security

Principal User: BUILTIN\Administrators

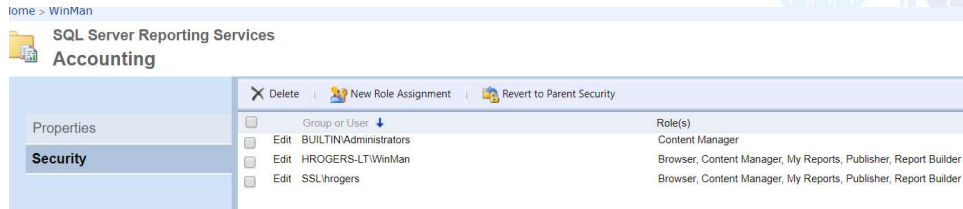
Role(s): Content Manager

Browser, Content Manager, My Reports, Publisher, Report Builder

Browser, Content Manager, My Reports, Publisher, Report Builder

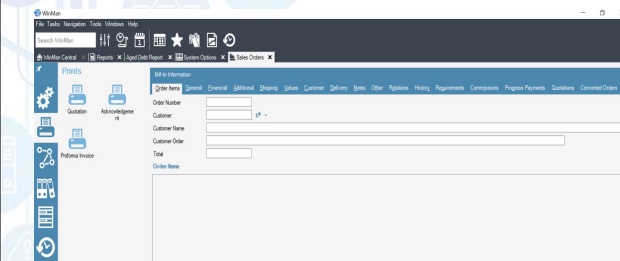
Report Security

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.



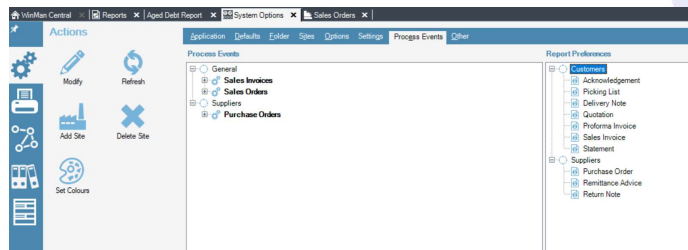
Right clicking on a "Print" or document will allow you to specify where and/or how you want the system to output the report.

Print Preferences

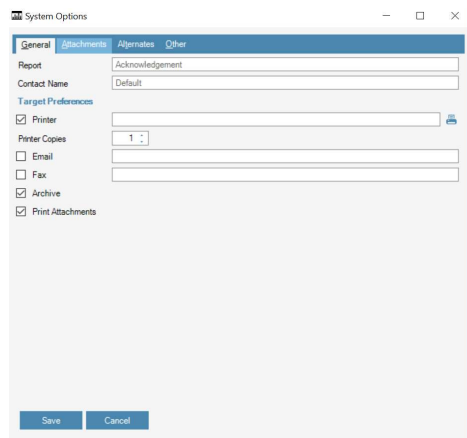
Prints that are sent out to customers or suppliers can have print preferences set up.

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

