

SWS - Forms in the Report Menu - Scheduled Reports

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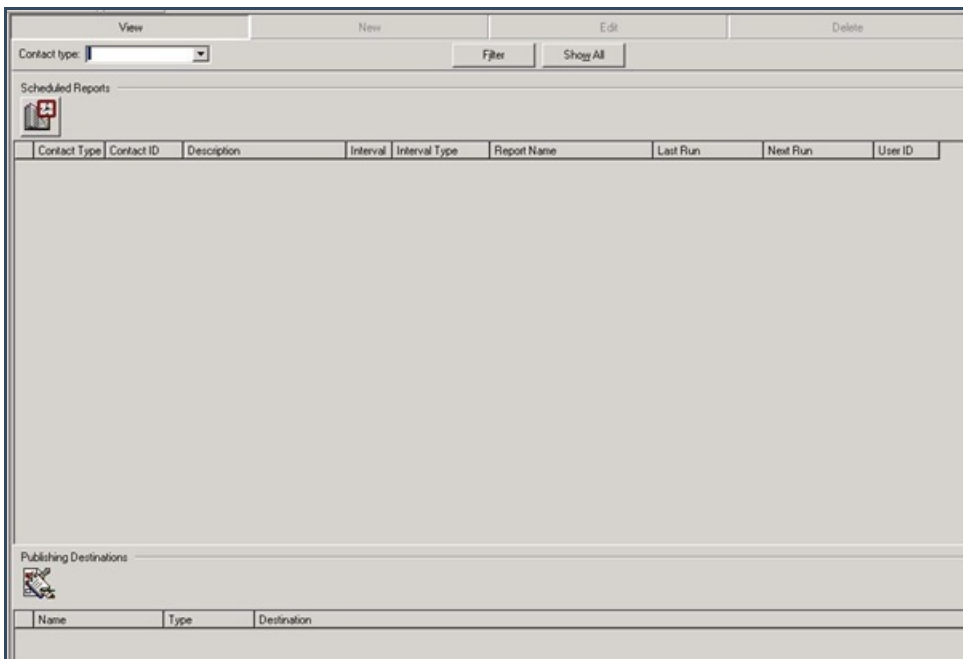
The Scheduled Reports form allows you to search for and view specific Scheduled Reports in Manitou. You can search by Company, Customer, Dealer, or Branch.

Viewing Scheduled Reports

Perform the following steps to view a specific Scheduled Report:

1. Navigate to the Reports menu, and select "Scheduled Reports".

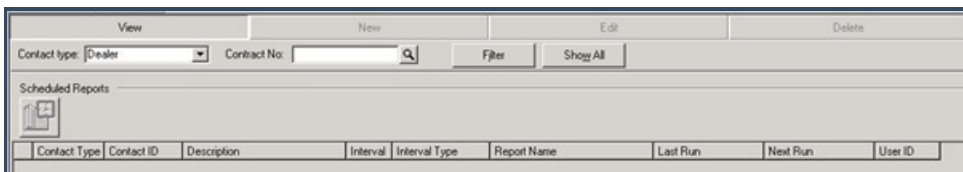
Result: The "Scheduled Reports" form displays as shown in the following screenshot:



The screenshot shows a web application interface for viewing scheduled reports. At the top, there are tabs for 'View', 'New', 'Edit', and 'Delete'. Below the tabs, there is a 'Contact type:' dropdown menu, a search icon, and buttons for 'Filter' and 'Show All'. The main content area is titled 'Scheduled Reports' and contains a table with the following columns: Contact Type, Contact ID, Description, Interval, Interval Type, Report Name, Last Run, Next Run, and User ID. Below the table, there is a section for 'Publishing Destinations' with a table that has columns for Name, Type, and Destination.

2. Open the "Contact type:" dropdown menu, and select "Company", "Customer", "Dealer", or "Branch".

Result: The "Contract No.:" field displays as shown in the following screenshot:



The screenshot shows the same web application interface as the previous screenshot, but with the 'Contract No.' field now visible and containing a search icon. The 'Contact type:' dropdown menu is still open, and the 'Filter' and 'Show All' buttons are still present.

3. If you want to display every instance of the Contact Type, click "Show All".
4. If you select the "Show All" option, skip steps 4-8 and continue with step 9.
5. If you want to limit your search to a specific Company, Customer, Dealer, or Branch, select the icon to the right of

the "Contract No:" field.

Result: The "Find" window displays as shown in the following screenshot:

The screenshot shows a 'Find Dealer' window with a search criteria section and a search results table. The search criteria section has five search keys, with the first one set to 'City' and 'colorado springs'. The search results table lists various dealers with their IDs, full names, types, contact points, addresses, and cities.

Dealer ID	Full Name	Type	Contact Point	Address 1	City
DLR0001	QuickBooks Dealer make this really long	Dealer	(777) 666-5555	455 Winchme Pl	Col
DLR0001S1	Sub Dealer to Dealer One	Dealer		3332 Some Other Street	Col
GH303	Grandson dealer	Dealer	(719) 654-8956	4880 Nightengale Drive	Col
123	Test	Dealer	(719) 596-2359	456 First Ave	Col
MASTERDLR	Master Dealer	Dealer	(111) 111-1111	1111 Master Lane	Col
SUBDLR	Sub Dealer	subtype dealer		111 South Street	Col
ALCDLR001S	Sub Dealer	Dealer	(719) 593-2829	123 here street	Col
124	New Dealer	Dealer	(719) 593-4589	456 Aulin Bluffs	Col
GH404	George's fourth dealer	Dealer	(709) 526-5698	1679 Nightengale drive	Col
CRYBABY	Ciy Baby	Dealer	(654) 654-3213	654	Col

Max Rows per Query: 2000

Search Load Clear Cancel

6. Select the search criteria you want from the "Search Key" dropdown menus, and enter a value in the corresponding "Value" fields.
7. When you have entered all the search criteria and values you want, click "Search".

Result: Your search results display in the "Search Results" area of the window as shown in the following screenshot:

Find Dealer

Search Criteria

Search Key 1: City Value: colorado springs

Search Key 2: Value:

Search Key 3: Value:

Search Key 4: Value:

Search Key 5: Value:

Search Results

Dealer ID	Full Name	Type	Contact Point	Address 1	City
DLR0001	QuickBooks Dealer make this really long	Dealer	(777) 666-5555	455 Winchime Pl	Col
DLR0001S1	Sub Dealer to Dealer One	Dealer		3332 Some Other Street	Col
GH303	Grandson dealer	Dealer	(719) 654-8956	4880 Nightengale Drive	Col
123	Test	Dealer	(719) 596-2359	456 First Ave	Col
MASTERDLR	Master Dealer	Dealer	(111) 111-1111	1111 Master Lane	Col
SUBDLR	Sub Dealer	subtype dealer		111 South Street	Col
ALCDLR001S	Sub Dealer	Dealer	(719) 593-2829	123 here street	Col
124	New Dealer	Dealer	(719) 593-4589	456 Autin Bluffs	Col
GH404	George's fourth dealer	Dealer	(709) 526-5698	1679 Nightengale drive	Col
CRYBABY	Cry Baby	Dealer	(654) 654-3213	654	Col

Max Rows per Query: 2000

Search Load Clear Cancel

8. Select the Entity you want from the list and click "Load".

Result: Any Scheduled Reports for the Entity you selected now display on the Scheduled Report form as shown in the following screenshot:

View New Edit

Contact type: Dealer Contract No: DLR0001 Filter Show All

Scheduled Reports

Description	Interval	Interval Type	Report Name	Last Run	Next Run	User ID
▶ Customer Activity	1	Week	Customer Activity	12/26/2013 16:30:00	01/02/2014 16:30:00	DEALER
▶ Alarm Detail	1	Month	Alarm Detail	12/22/2013 00:00:02	01/22/2014 00:00:00	DLRWEB

Publishing Destinations

Name	Type	Destination
▶ QuickBooks Dealer make	E-mail	bill@boldgroup.com

9. Select the specific Report you want to view, and click "View Selected".

Result: A window displays details for the Scheduled Report you selected as shown in the following screenshot:

The screenshot shows a software window with a menu bar containing 'View', 'New', and 'Edit'. On the left is a tree view under 'Activity' with the following items: Alarm Cause Summary, Alarm Detail (selected), Customer Activity, Daily Signals, Last Signal Date, Signal Count by Customer, Unrestored Signals, Custom, Maintenance, Master File, and System. The main area is titled 'Alarm Detail' and contains a 'Report Description' field with the text 'Alarm Detail'. Below this are two columns of fields labeled 'From :' and 'To :'. The 'From :' column contains: Customer ID (YANNA2), Customer name (empty), Dealer ID (DLR0001), Branch ID (empty), Alarm No (empty), Group (dropdown), Class (dropdown), Zip/Post (empty), and Date (01/01/2014, 00:00:00). The 'To :' column contains: Customer ID (YANNA2), Customer name (empty), Dealer ID (DLR0001), Branch ID (empty), Alarm No (empty), Group (dropdown), Class (dropdown), Zip/Post (empty), and Date (01/22/2014, 23:59:00). There are search icons next to the Customer ID and Dealer ID fields. Below the date fields is a checkbox for 'Page break between customers' and two buttons: 'Options...' and 'Advanced...'. At the bottom, there are two sections: 'Dispatched' with radio buttons for 'All' (selected), 'Dispatched', and 'Not dispatched'; and 'Output format' with radio buttons for 'Long', 'Normal' (selected), and 'Extended'.