Saved Reports & Portfolios

Quick reference guide

Nov 2016 Version 5.3 onwards

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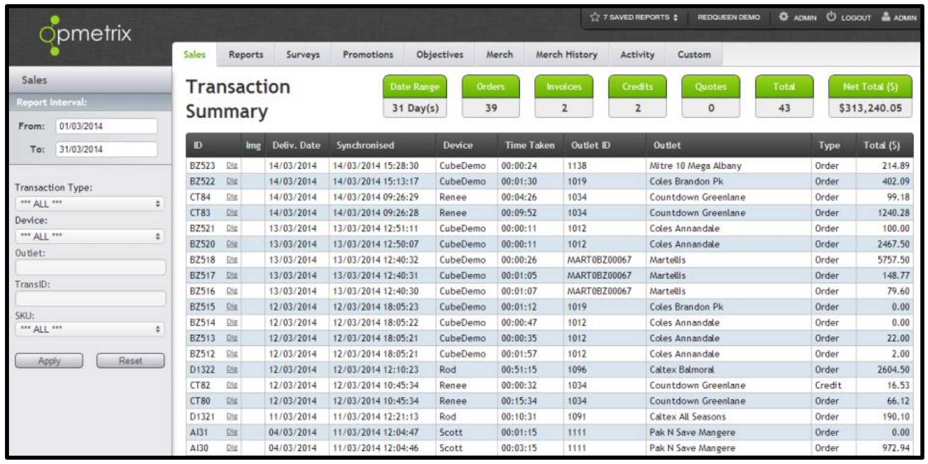
Introduction



Opmetrix allows the content of reports to be defined then stored as a saved report. Saved reports are quickly accessible from the task bar and available from any page in the Opmetrix CMS.

Saved reports can be packaged into a report portfolio targeted for an individual recipient or group of recipients. The portfolio gets automatically emailed as a PDF or zipped Excel file attachment on a scheduled basis. For example, a portfolio may be sent on a weekly basis whereas others containing different saved reports may be sent on a monthly basis.

Examples of saved reports and portfolios:

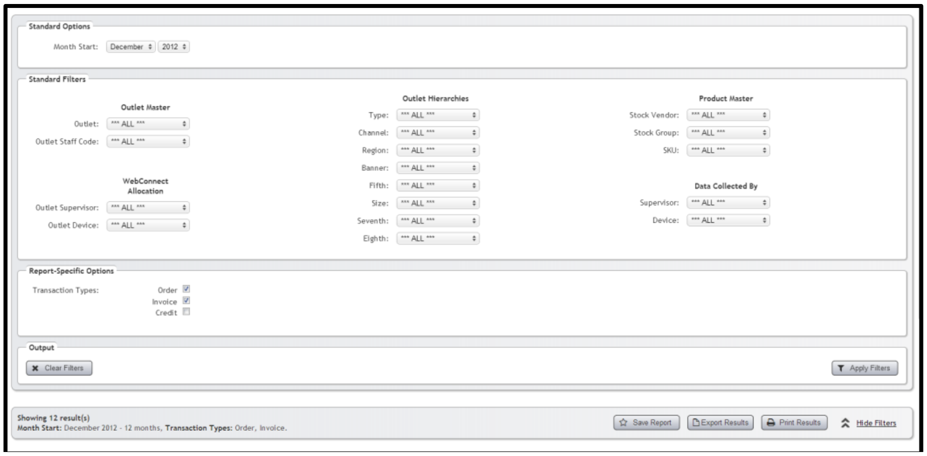
- A daily email showing yesterday's sales.
- A daily email showing number of stores visited and times.
- A weekly email to reps showing their budget vs actual figures.
- A weekly email containing photos of displays.
- A weekly email with a Calling Card or Survey report deck.
- A monthly email containing total sales and activity.

Saved reports and portfolios are linked to an Opmetrix login allowing a custom set of reports for each user accessing the system.

Defining a saved report

__Note:__ Only reports with the Filter task bar can be saved as custom reports.

Select the base report to use by choosing the relevant filters.



Apply filters

Open the filters area by selecting **Show Filters** or by clicking the grey filters bar. Set the appropriate filters to target the data required.

Set report specific filters

Many reports have parameters specific to that report. These are shown in the report specific options area. Set the parameters required.

Set the reporting period

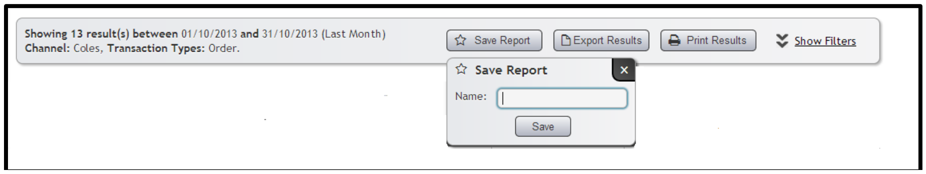
Setting a reporting period ensures the report will always calculate current data when generated. Select a current reporting period or one with YA (Year Ago) to show data for last year.

If a report should always have fixed dates, select ***** Date Range ***** and enter the start and end dates required. The report will always run with those dates.

Saving and accessing reports

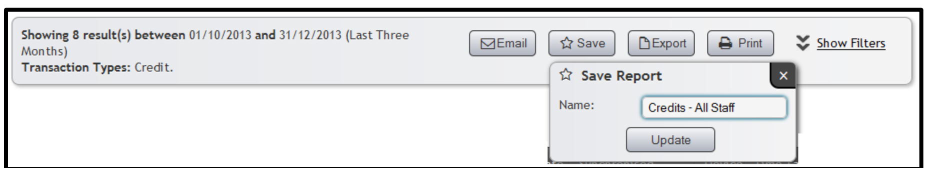
Tip: *Report names can be up to 200 characters. This is useful to clearly name the report and reporting period.*

Saving a report



Once the report is defined, select **Save Report** from the filter bar. Enter a name for this report and select **Save.**

Updating a report



Once a saved report is loaded it is possible to adjust the filters of the report and save it again. This is done by applying the filters, selecting **Save Report** and selecting **Update**.

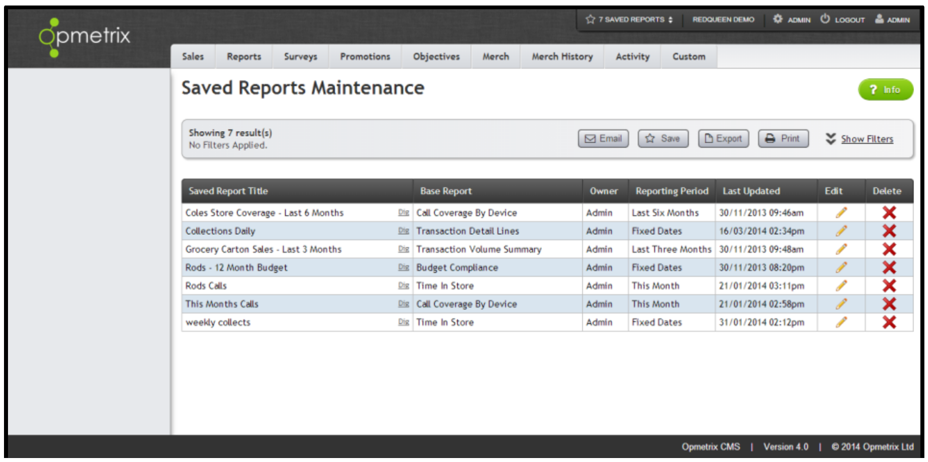
Accessing a report

The number of saved reports is shown in the Opmetrix task bar. Select **Saved Reports** and a list of reports for the currently logged in user is displayed. Select the desired report to display.

Saved reports maintenance

To edit or delete a saved report select **Saved Reports** from the Opmetrix task bar then select **Maintenance.**

A list of saved reports is displayed with the following properties:



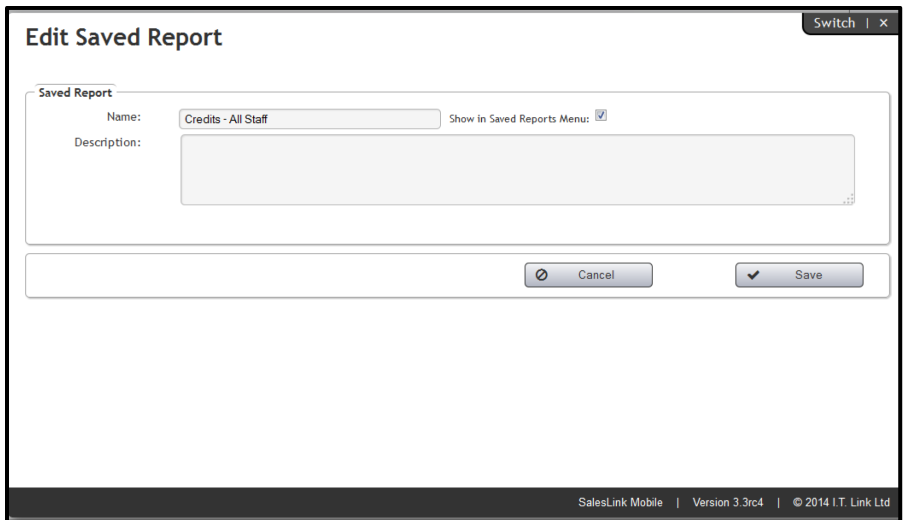
Saved Report Title	The name of the saved report.
Base Report	The base report from which the saved report was created from.
Owner	The Opmetrix login that created the report.
Reporting Period	Shows the reporting period (e.g. Last Month) or displays 'Fixed Dates' if start and end dates have been set.
Last Updated	The date and time this report was last modified.

Editing / deleting saved reports

Edit a report

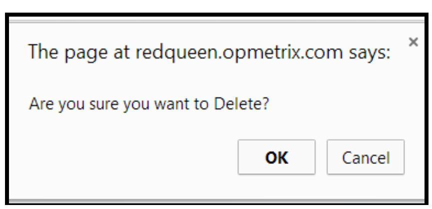
Select **Edit** (pencil icon) to change the name and description of this report, then select **Save.**

At this point it is also possible to remove a saved report from the Saved Reports Menu while keeping it for a portfolio. De-select **Show in Saved Reports Menu** to accomplish this.



Delete a report

Select **Delete** to remove this report from the list.

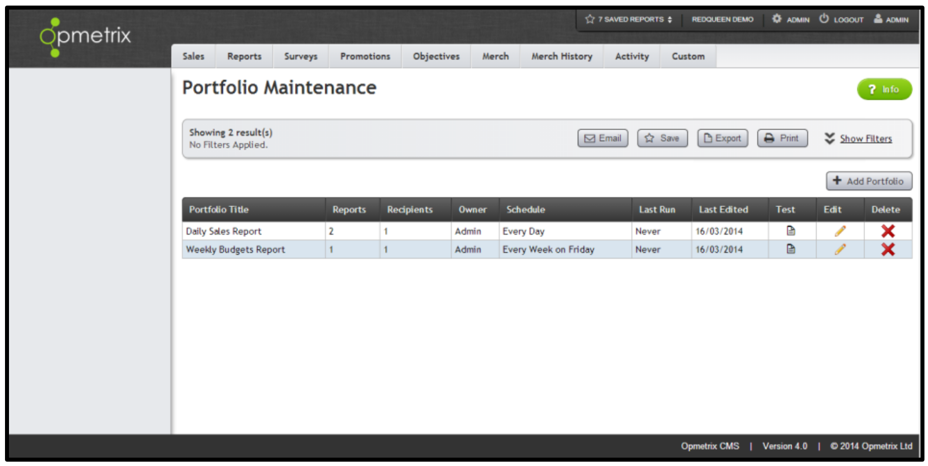


Portfolios

Portfolios are best used to send report information to management and the field team. A portfolio can contain one or many reports and are sent by email on a scheduled basis.

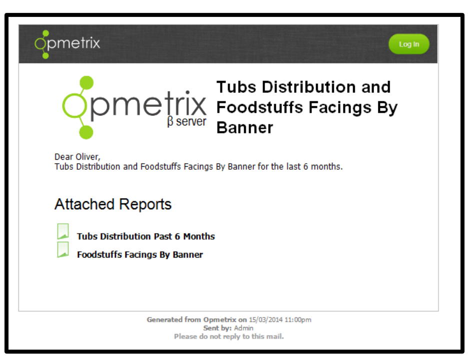
Reports can be delivered as PDF or excel email attachments, making them easy to print and read even on a smart phone or mini tablet.

A portfolio includes a cover page with the company logo and a list of reports contained within.



Portfolio reports are generated automatically at 11pm every night and emails are sent to nominated recipients shortly thereafter.

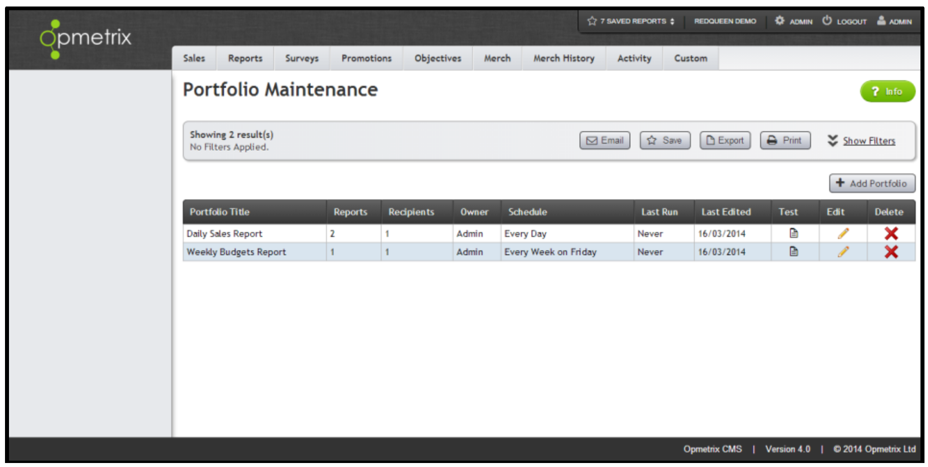
Like saved reports, portfolios are linked to an Opmetrix user login. Only that user can edit/delete the portfolios they have created.



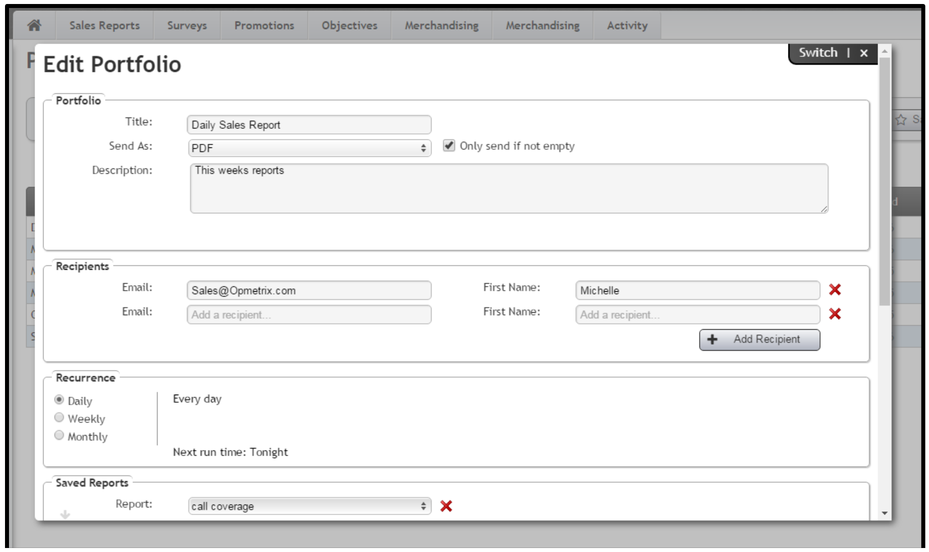
Creating a portfolio

Select **Saved Reports** from the Opmetrix task bar then select **Portfolio Maintenance.**

The Portfolio maintenance screen is displayed.



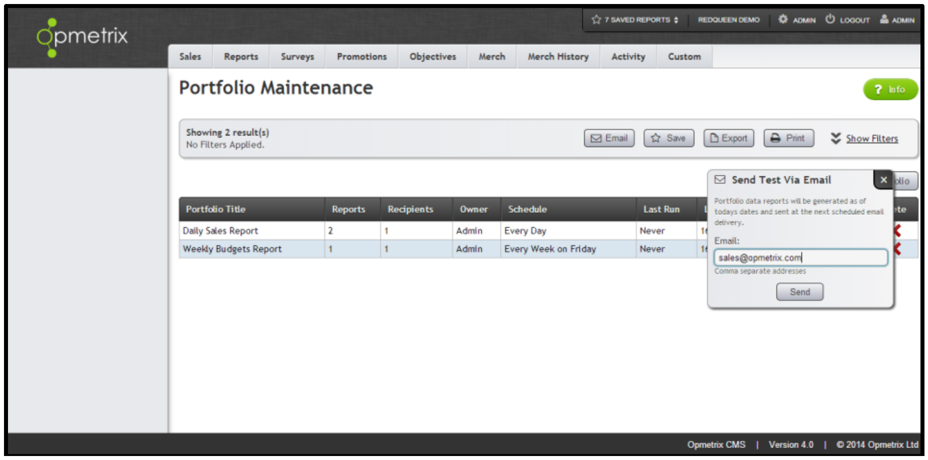
Select **Add Portfolio.**



Title	The name of the portfolio.
Save As	Select from dropdown to save as PDF or Excel
Description	A description of the reports contained. This appears on the cover page of the portfolio and the email.
Recipients	A list of email addresses and the first names of who should receive this portfolio.
Recurrence	Daily (everyday). Weekly (select a day of the week). Monthly (select the date or last day of month).
Saved Reports	The reports to include in this portfolio. You can set the order using the up/down arrows.
Save	Bottom right to **Save** the portfolio.

Testing a portfolio

Once created, a portfolio can be tested to ensure the report data and format will be as required.



Select the test icon for the portfolio you want to send and enter the email address you wish it to be sent to. Then select **Send.**

The Opmetrix email system sends emails every five minutes. You will receive an email within that time-frame.

Tips on portfolios

Use the correct reporting period

If you are sending a daily portfolio then the saved reports should have a reporting period set to **today.** This means the daily portfolio will contain today's data only.

Similarly, a weekly report should have saved reports set to a weekly reporting period.

An exception might be budgets which might be sent weekly but the sales accumulate monthly. The reporting period for the saved budget report would then be monthly.

Limit your data

If you create a saved report that has too much data, or photos in the PDF attachment are very large, create saved reports for smaller time-frames and test the portfolio to ensure the files are not too big to receive in a normal email.

Check the email log

An Opmetrix administrator has access to an email log. This shows which emails Opmetrix has sent or if there are any issues with the email queue. We recommend checking this log regularly.