



Saved Reports & Portfolios

Quick reference guide

Nov 2016 Version 5.3 onwards

Contents

Introduction	3
Defining a saved report.....	4
Saving and accessing reports	5
Saved reports maintenance	6
Editing / deleting saved reports.....	7
Portfolios.....	8
Creating a portfolio	9
Testing a portfolio	11
Tips on portfolios	12

Introduction

ID	Img	Deliv. Date	Synchronised	Device	Time Taken	Outlet ID	Outlet	Type	Total (\$)
BZ523	img	14/03/2014	14/03/2014 15:28:30	CubeDemo	00:00:24	1138	Mitre 10 Mega Albany	Order	214.89
BZ522	img	14/03/2014	14/03/2014 15:13:17	CubeDemo	00:01:30	1019	Coles Brandon Pk	Order	402.09
CT84	img	14/03/2014	14/03/2014 09:26:29	Renee	00:04:26	1034	Countdown Greenlane	Order	99.18
CT83	img	14/03/2014	14/03/2014 09:26:28	Renee	00:09:52	1034	Countdown Greenlane	Order	1240.28
BZ521	img	13/03/2014	13/03/2014 12:51:11	CubeDemo	00:00:11	1012	Coles Annandale	Order	100.00
BZ520	img	13/03/2014	13/03/2014 12:50:07	CubeDemo	00:00:11	1012	Coles Annandale	Order	2467.50
BZ518	img	13/03/2014	13/03/2014 12:40:32	CubeDemo	00:00:26	MAART08Z00067	Maertelis	Order	5757.50
BZ517	img	13/03/2014	13/03/2014 12:40:31	CubeDemo	00:01:05	MAART08Z00067	Maertelis	Order	148.77
BZ516	img	13/03/2014	13/03/2014 12:40:30	CubeDemo	00:01:07	MAART08Z00067	Maertelis	Order	79.60
BZ515	img	12/03/2014	12/03/2014 18:05:23	CubeDemo	00:01:12	1019	Coles Brandon Pk	Order	0.00
BZ514	img	12/03/2014	12/03/2014 18:05:22	CubeDemo	00:00:47	1012	Coles Annandale	Order	0.00
BZ513	img	12/03/2014	12/03/2014 18:05:21	CubeDemo	00:00:35	1012	Coles Annandale	Order	22.00
BZ512	img	12/03/2014	12/03/2014 18:05:21	CubeDemo	00:01:57	1012	Coles Annandale	Order	2.00
D1322	img	12/03/2014	12/03/2014 12:10:23	Rod	00:51:15	1096	Catex Balmora	Order	2604.50
CT82	img	12/03/2014	12/03/2014 10:45:34	Renee	00:00:32	1034	Countdown Greenlane	Credit	16.53
CT80	img	12/03/2014	12/03/2014 10:45:34	Renee	00:15:34	1034	Countdown Greenlane	Order	66.12
D1321	img	11/03/2014	11/03/2014 12:21:13	Rod	00:10:31	1091	Catex All Seasons	Order	190.10
A131	img	04/03/2014	11/03/2014 12:04:47	Scott	00:01:15	1111	Pak N Save Mangere	Order	0.00
A130	img	04/03/2014	11/03/2014 12:04:46	Scott	00:03:15	1111	Pak N Save Mangere	Order	972.94

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

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

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

The screenshot shows a web-based report configuration interface. At the top, there's a 'Standard Options' section with a 'Month Start' dropdown set to 'December 2012'. Below this is the 'Standard Filters' section, which is divided into three columns: 'Outlet Master' (with filters for Outlet and Outlet Staff Code), 'Outlet Hierarchies' (with filters for Type, Channel, Region, Banner, Fifth, Size, Seventh, and Eighth), and 'Product Master' (with filters for Stock Vendor, Stock Group, and SKU). There's also a 'WebConnect Allocation' section with filters for Outlet Supervisor and Outlet Device, and a 'Data Collected By' section with filters for Supervisor and Device. The 'Report-Specific Options' section includes 'Transaction Types' with checkboxes for Order, Invoice, and Credit. At the bottom, there's an 'Output' section with 'Clear Filters' and 'Apply Filters' buttons. A status bar at the very bottom indicates 'Showing 12 result(s)' and 'Month Start: December 2012 - 12 months, Transaction Types: Order, Invoice', along with buttons for 'Save Report', 'Export Results', 'Print Results', and 'Hide 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.

The screenshot shows a dropdown menu for selecting a date range. The menu is open, showing options grouped by category: 'Date Range' (with 'This Month' selected), 'Day' (Today, Yesterday), 'Week' (This Week, Last Week), 'Month' (This Month, Last Month, Last 3 Months, Last 6 Months), and 'Year Ago (YA)' (This Week YA, Last Week YA, This Month YA, Last Month YA, Last 3 Months YA, Last 6 Months YA).

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

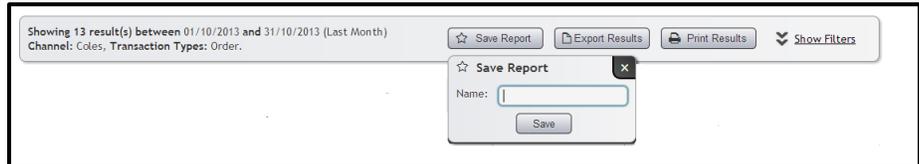
Setting a reporting period ensures the report will always calculate current data when generated. Select a current reporting period or one with YA (Year Ago) to show data for last year.

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

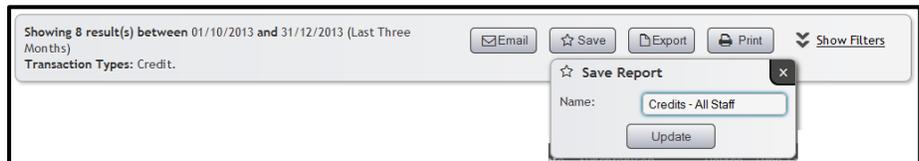
Saving a report

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



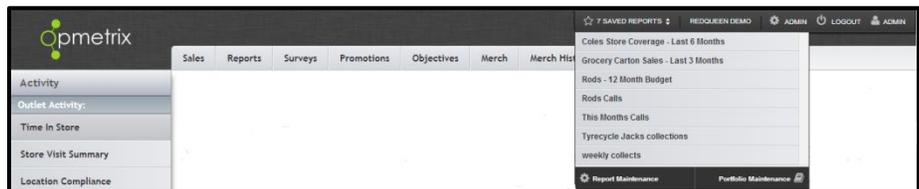
Once the report is defined, select **Save Report** from the filter bar. Enter a name for this report and select **Save**.

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



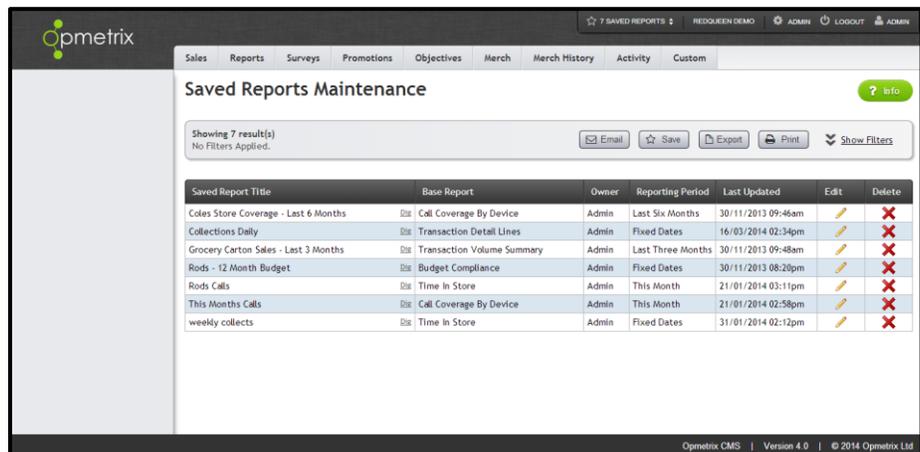
The number of saved reports is shown in the Opmetrix task bar. Select **Saved Reports** and a list of reports for the currently logged in user is displayed. Select the desired report to display.

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

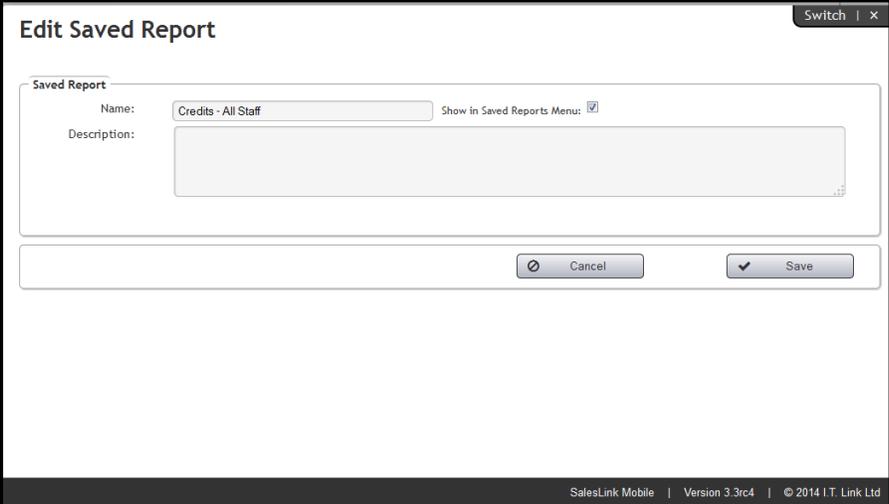
The date and time this report was last modified.

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.



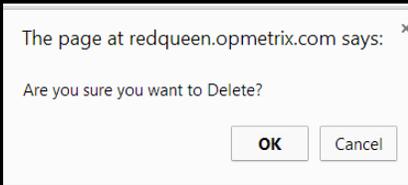
The screenshot shows a dialog box titled "Edit Saved Report" with a "Switch" button and a close icon in the top right corner. The dialog contains a "Saved Report" section with the following fields:

- Name:** A text input field containing "Credits - All Staff".
- Show in Saved Reports Menu:** A checkbox that is currently checked.
- Description:** A large text area for entering a description.

At the bottom of the dialog, there are two buttons: "Cancel" (with a trash icon) and "Save" (with a checkmark icon). The footer of the dialog reads "SalesLink Mobile | Version 3.3rc4 | © 2014 I.T. Link Ltd".

Delete a report

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



The screenshot shows a confirmation dialog box with the following text:

The page at redqueen.opmetrix.com says: ✕

Are you sure you want to Delete?

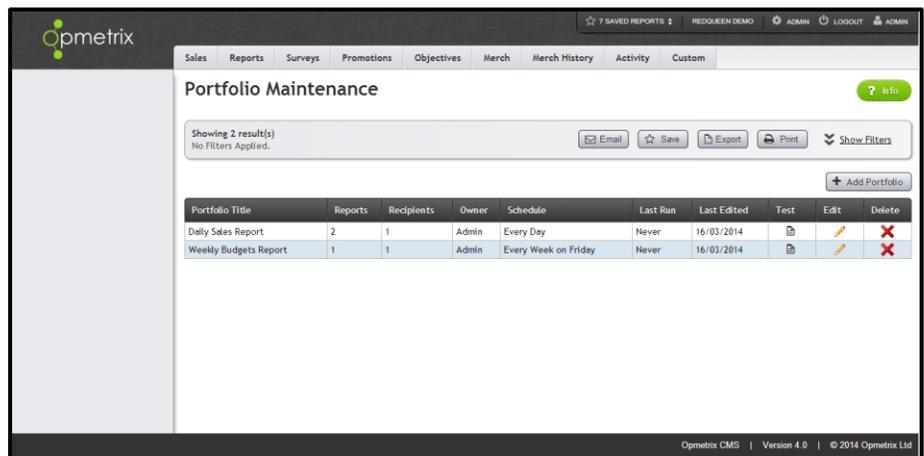
At the bottom, there are two buttons: "OK" and "Cancel".

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.

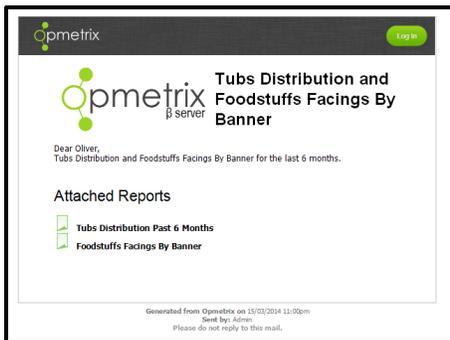
Reports can be delivered as PDF or excel email attachments, making them easy to print and read even on a smart phone or mini tablet.

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.

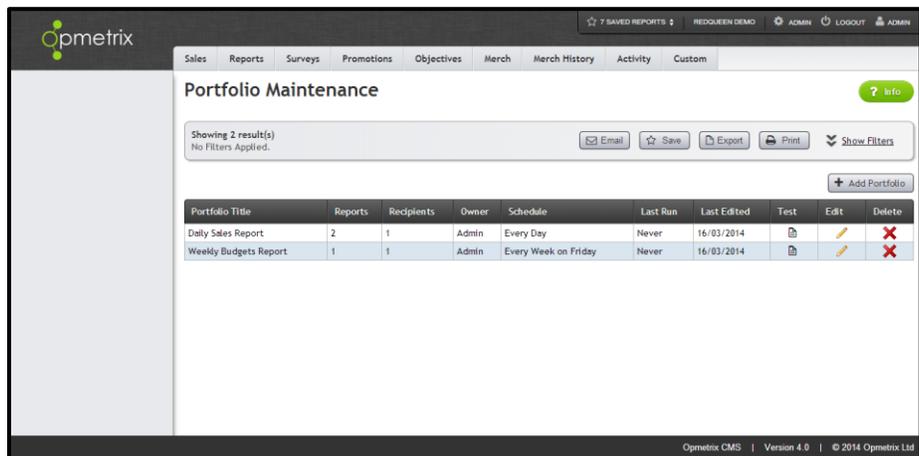


Creating a portfolio

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



The Portfolio maintenance screen is displayed.

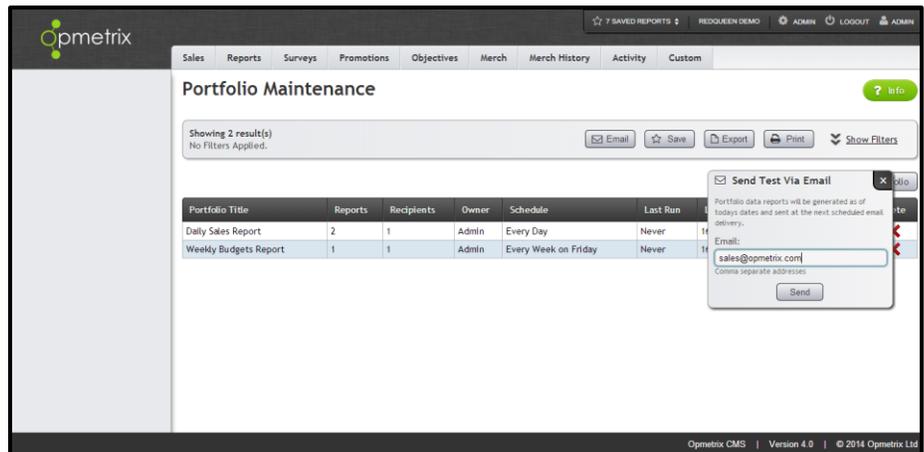


Select **Add Portfolio**.

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.