

# ADM Report Retrieval Redesign

November 2019



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## Table of Contents

Introduction .....	1
Reports Main screen.....	1
FAVORITES.....	2
RECENTS.....	2
ALL REPORTS .....	2
Scheduling Reports .....	3
Date Range .....	4
Frequency .....	6
Editing the Scheduling Forms .....	7
Reports Previews.....	8
Run Report Form and Report Results .....	8

## Introduction

As part of the server release rel-191025-server, new report functionality has been added to ADM which allows you to retrieve reports more easily. You will now have an organized list of reports that can be setup to send as PDF or Excel files through email or run on a periodic basis.

The reports themselves have not changed. Only the screens where you set up the report criteria have changed.

## Reports Main screen

To access the **Report Main** screen:

1. Click on the **Reports** tab on the **Home** page of ADM. The screen will display two panels, **Reports List** and **Scheduled Reports**. (Figure 1)

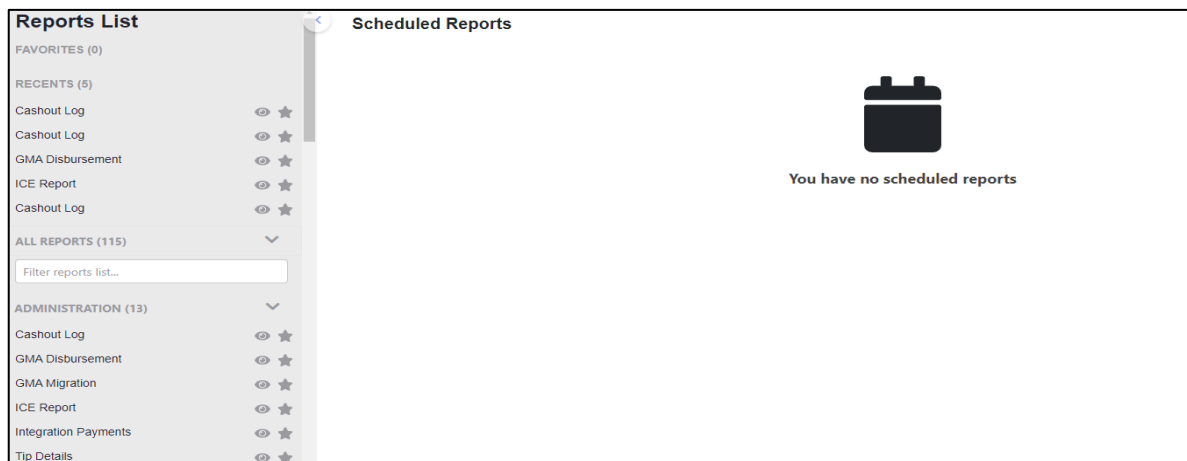


Figure 1 – Reports Main screen

2. You can view and manage the following new sections in the **Reports List** panel:

- FAVORITES
- RECENTS
- ALL REPORTS
- Report categories:\*
  - ADMINISTRATION
  - CONSUMER
  - TRANSACTIONS
  - FINANCIAL
  - PRODUCT
  - INVENTORY

\*These categories will be expanded when you first open the **Reports Main** screen.

# ADM Report Retrieval Redesign

## FAVORITES

When you have chosen reports as FAVORITES, they will appear in the FAVORITES section in the **Reports List** panel.

- To designate a report as a FAVORITE, click the **star** next to the eye symbol to the right of the report's name. The star will turn blue and a copy of the report will appear in the FAVORITES section. (Figure 2)
- To remove a report from the FAVORITES section, click on the star again.

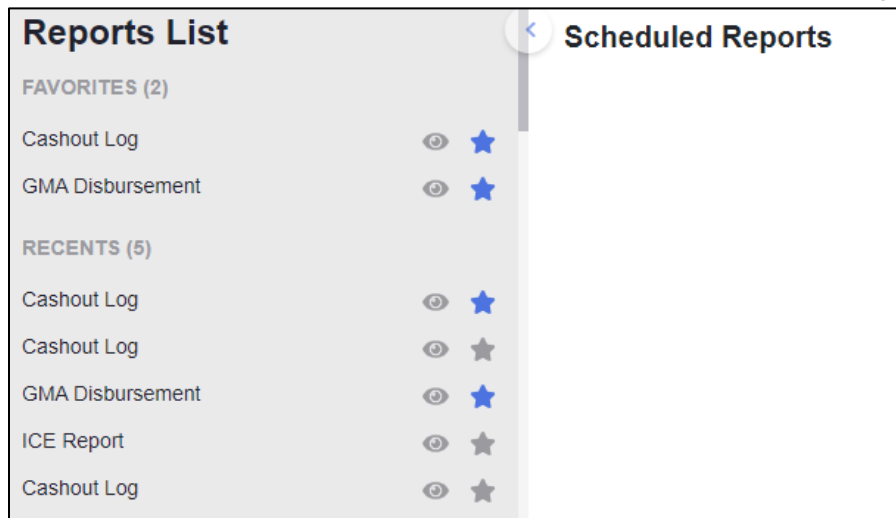


Figure 2 – Reports selected as Favorites

## RECENTS

The last five reports that you have accessed will be listed in the **RECENTS** section. You cannot delete reports from the **RECENTS** section. The reports change on a revolving basis as you continue to access additional reports. Reports in this section can also be designated as FAVORITES or previewed by clicking on the eye symbol.

## ALL REPORTS

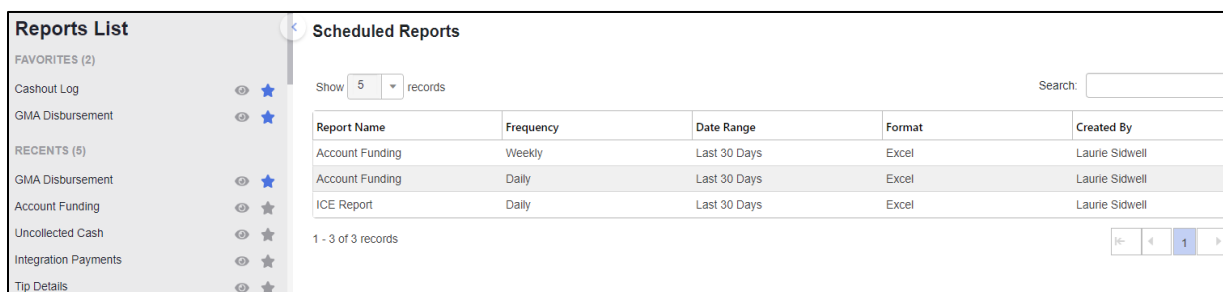
ALL REPORTS contains the search function that allows you to search for a specific report without having to browse through the six report categories. Click on ALL REPORTS to expand or collapse the list of all reports.

# ADM Report Retrieval Redesign

## Scheduling Reports

The **Scheduled Reports** panel will populate with a grid after you have run and scheduled a report. The saved information will be shown in the **Scheduled Reports** grid. The grid will contain these fields: (Figure 3)

- Report Name
- Frequency (Daily, Weekly, Monthly Specific, Monthly Relative)
- Data Range
- Format (MS Excel or PDF)
- Created By



Report Name	Frequency	Date Range	Format	Created By
Account Funding	Weekly	Last 30 Days	Excel	Laurie Sidwell
Account Funding	Daily	Last 30 Days	Excel	Laurie Sidwell
ICE Report	Daily	Last 30 Days	Excel	Laurie Sidwell

Figure 3 – Scheduled Reports grid

### To schedule a report:

1. Click on the **report** you want to schedule. The report scheduling criteria will display in the left panel. (Figure 4)

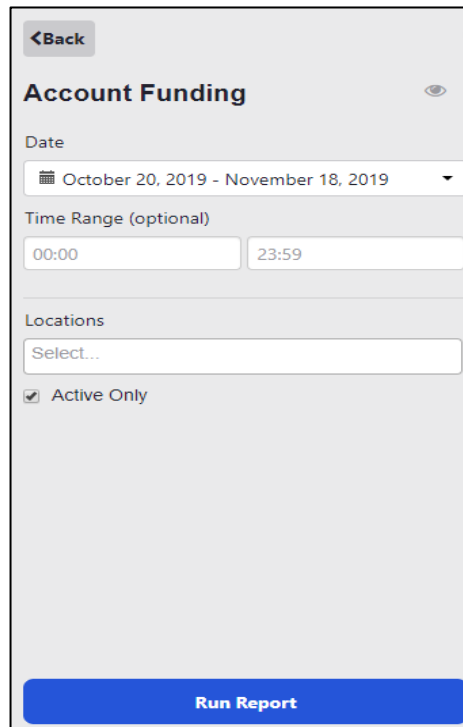


Figure 4 – Report Scheduling criteria

2. Choose the **date** or **date range**. Setting a time range is optional (if this field is displayed). The default date range is Last 30 days.

### Date Range

The following Date Ranges can be set in the **Run Report** form:

- Yesterday
- Today
- Last Seven Days
- Last 30 Days
- Last 60 Days
- Last Week
- Current and Previous Month
- This Week
- Last Month
- This Month
- Custom Range  
(If this is selected, the Scheduled Reports grid will show the From Date and To Date in the *Data Range* column).

3. Choose the **Location(s)**.

# ADM Report Retrieval Redesign



4. Click **Run Report**. The report will display in the right panel. (Figure 5)

Date	Location	Operator Credit	Consumer Credits	Kiosk Credit	Kiosk Cash	Remaining Account Balances	Account Sales	Credit Sales	Total Sales
10/22/19	KellyLocation	\$0.00	\$0.00	\$5.00	\$0.00	\$21,030.12	\$4.70	\$28.20	\$32.90
10/22/19	Test Market 4	\$5.00	\$0.00	\$0.00	\$0.00	\$21,030.12	\$0.00	\$0.00	\$0.00
10/23/19	Doms Happy Place	-\$4.71	\$0.00	\$25.00	\$5.00	\$21,030.12	\$120.75	\$0.00	\$120.75
10/23/19	Lightspeed Test Location	\$2.00	\$0.00	\$0.00	\$21.00	\$21,030.12	\$4.00	\$0.00	\$4.00
10/23/19	Test Market 4	-\$99,773.35	\$0.00	\$0.00	\$0.00	\$21,030.12	\$0.00	\$0.00	\$0.00
10/24/19	Doms Happy Place	\$0.00	\$0.00	\$0.00	\$0.00	\$21,030.12	\$0.00	\$0.00	\$1.42
10/24/19	KellyLocation	\$0.00	\$0.00	\$0.00	\$0.00	\$21,030.12	\$6.45	\$0.00	\$7.45

Figure 5 – Report displayed in the right panel

5. Click **Schedule Report** in the upper right corner of the screen. The report scheduling options will display in the Scheduling Form in the left panel. (Figure 6)

**Scheduling**

### Account Funding

Frequency

**Daily** Weekly Monthly

Recipients

x Laurie Sidwell

Report Format

**Excel** PDF

**Schedule Report**

Figure 6 – Options for scheduling a report

6. Select the **Frequency** of the report.

# ADM Report Retrieval Redesign

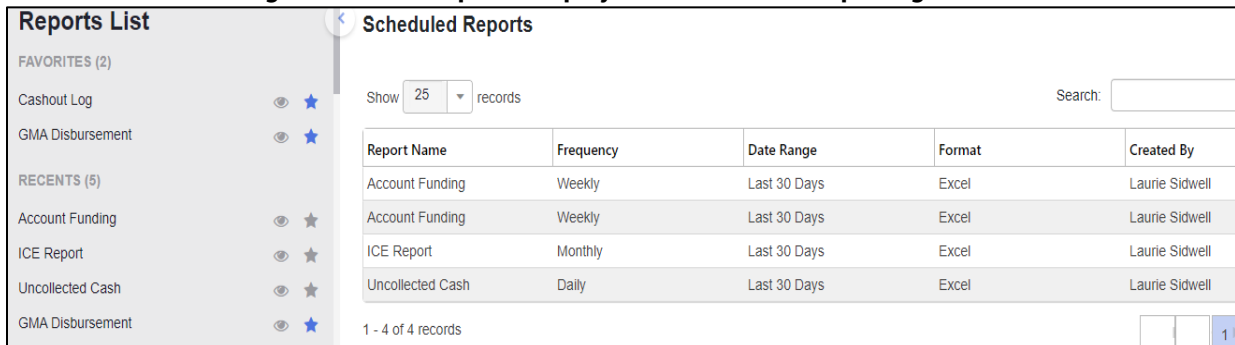
## Frequency

The following Frequency options will display in the **Scheduling Report** grid:

- **Daily** – The selection will appear as daily. This is selected by default.
- **Weekly** – The selection will appear weekly (M/F, S/S).  
(i.e., Weekly with recur Monday through Friday or any combination of days that you choose.)
- **Monthly Specific** – The selection will appear as monthly (Day 1, 26, 31).  
(i.e., Monthly with recur on day 1, 26, and 31 of every month.)
- **Monthly Relative** – The selection will appear as monthly (1st Sunday).  
(i.e., Monthly with recur on the 1st Sunday of every month.)

7. Choose the **Recipients** from a list of ADM users or manually enter comma separated emails.
8. Select the **Report Format**: Excel or PDF. Excel is selected by default.
9. Click **Schedule Report**. The message “Report Scheduled” will flash in the lower right corner when the report has been successfully scheduled.
10. Click **Done** at the top of the screen. The **Scheduled Reports** grid displays showing your new report. (Figure 7)

**Figure 7 – Your reports displayed in Scheduled Reports grid**



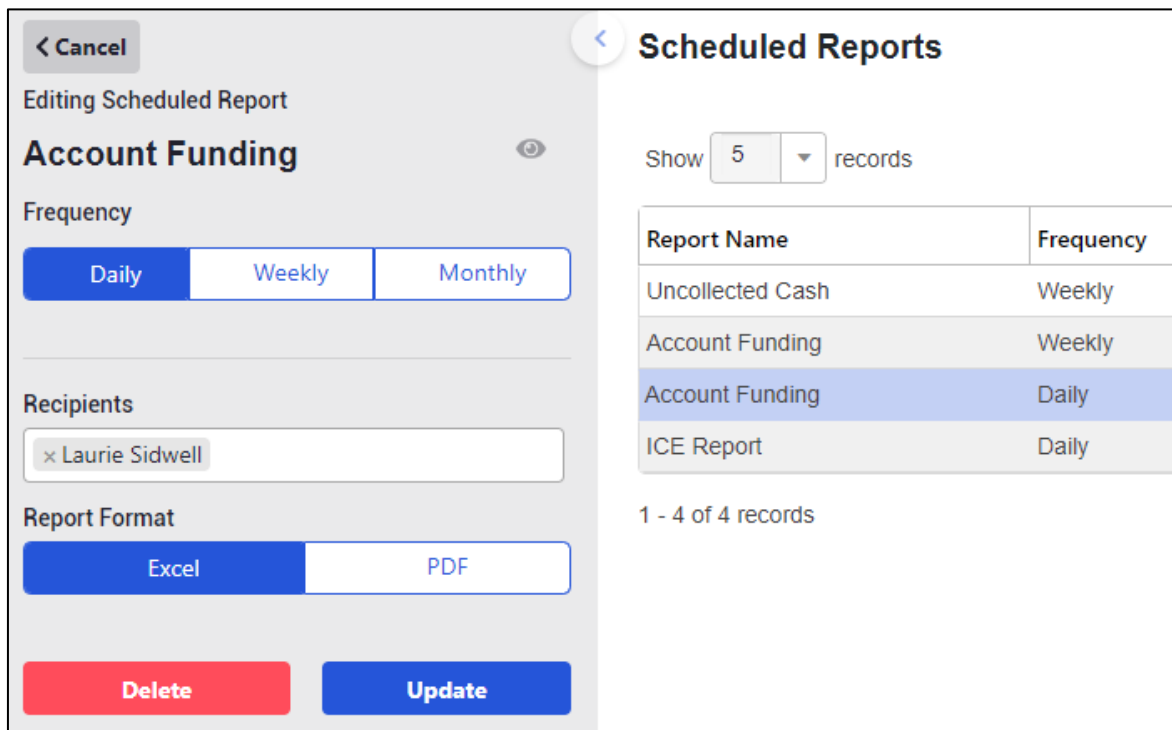
Report Name	Frequency	Date Range	Format	Created By
Account Funding	Weekly	Last 30 Days	Excel	Laurie Sidwell
Account Funding	Weekly	Last 30 Days	Excel	Laurie Sidwell
ICE Report	Monthly	Last 30 Days	Excel	Laurie Sidwell
Uncollected Cash	Daily	Last 30 Days	Excel	Laurie Sidwell



# ADM Report Retrieval Redesign

## To delete a Scheduled Report:

1. Click in the row of any report. **Editing Scheduled Report** options will display in the left panel. (Figure 8)



Report Name	Frequency
Uncollected Cash	Weekly
Account Funding	Weekly
Account Funding	Daily
ICE Report	Daily

Figure 8 – Editing Scheduled Report options

2. Select **Delete**.

The message “Scheduled Report Deleted” will flash in the lower right corner when the report has been successfully deleted. The report will be removed from the Scheduled Reports grid but will still be available in the left panel with all of the other reports.

## Editing the Scheduling Forms

The **Scheduling Form** can be used to edit:

- Scheduled report frequency
- Format selected
- Email addresses

The message “Scheduled Report Updated” will flash in the lower right corner when the report has been successfully updated.

# ADM Report Retrieval Redesign

## Reports Previews

To see a preview of any report, tap the **eye symbol** next to the star by the name of the report. You will see a preview of the report that you selected. (Figure 9) The **Report Preview** grid will include the following sections:

- Report Name
- Description
- Knowledge Base – links about the report
- Data Included – types of data included in the report
- Preview – image of a sample report

**Account Funding**

**DESCRIPTION**

Shows daily totals for credits, cash, and sales. This report breaks up operator and consumer credits, and account or credit sales. The remaining account balance field is current for when you pull it.

**KNOWLEDGE BASE**

[Help section](#)

**DATA INCLUDED**

- Date
- Kiosk Cash
- Other Sales
- Operator Credit
- Remaining Account Balances
- Total Sales
- Consumer Credits
- Account Sales
- Kiosk Credit
- Credit Sales

**PREVIEW**

Account Funding for Supersmartmart - Main Breakroom - 2/5/19 12:00 AM to 3/6/19 11:59 PM

Date	Operator Credit	Consumer Credits	Kiosk Credit	Kiosk Cash	Remaining Account Balances	Account Sales
02/05/19				\$3.00	\$666.73	\$347.47
02/06/19					\$666.73	\$173.88
02/07/19					\$666.73	\$234.91

Figure 9 – Preview of Account Funding report

If a preview is not available, the message “No preview available for this report” will display.

You can access Report Previews by clicking on the eye symbol in the **Report List panel**, **Run Report Form** or the **Scheduling Form**.

## Run Report Form and Report Results

You will now be able to run reports conveniently without losing your report criteria when you want to re-run the report for different date ranges or locations.

To access the new **Run Report** form: (Figure 10)

1. Click on any report in the **Report List Panel (left)** on the **Reports Main** screen. The form contains:
  - Name of the report
  - Report Preview icon
  - Date range fields

# ADM Report Retrieval Redesign

- Locations selection fields
- The **Run Report** button

Figure 10 – Run Report form

Define your criteria. The **Results** screen will display the results of the report in the right panel. (Figure 11)

Date	Location	Operator Credit	Consumer Credits	Kiosk Credit	Kiosk Cash	Remaining Account Balances	Account Sales	Credit Sales	Total Sales
10/22/19	KellyLocation	\$0.00	\$0.00	\$5.00	\$0.00	\$21,030.12	\$4.70	\$28.20	\$32.90
10/22/19	Test Market 4	\$5.00	\$0.00	\$0.00	\$0.00	\$21,030.12	\$0.00	\$0.00	\$0.00
10/23/19	Doms Happy Place	-\$4.71	\$0.00	\$25.00	\$5.00	\$21,030.12	\$120.75	\$0.00	\$120.75
10/23/19	Lightspeed Test Location	\$2.00	\$0.00	\$0.00	\$21.00	\$21,030.12	\$4.00	\$0.00	\$4.00
10/23/19	Test Market 4	-\$99,773.35	\$0.00	\$0.00	\$0.00	\$21,030.12	\$0.00	\$0.00	\$0.00

Figure 11 – The Results screen



# ADM Report Retrieval Redesign

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2. You then have the option to export the data to **Excel** or **Print** to PDF.

The **Results** screen will also display these buttons and fields:

- **Done** button
- **To Excel** button
- **Print** button
- **Scheduled Report** button
- Title of the report
- Date Range