



ISS Reporting

Quick Links

## **User Guide**

EnfoTrust Networks, Inc

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## About this Guide

### *User Guide -November 2005*

This edition, released November 2005, is designed to help you understand the functionality and usage of the Quick Links.

### Conventions Used in this Guide

- Text describing an illustration always appears *after* the illustration.

### *Notices, Terms, and Conditions*

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## Reporting

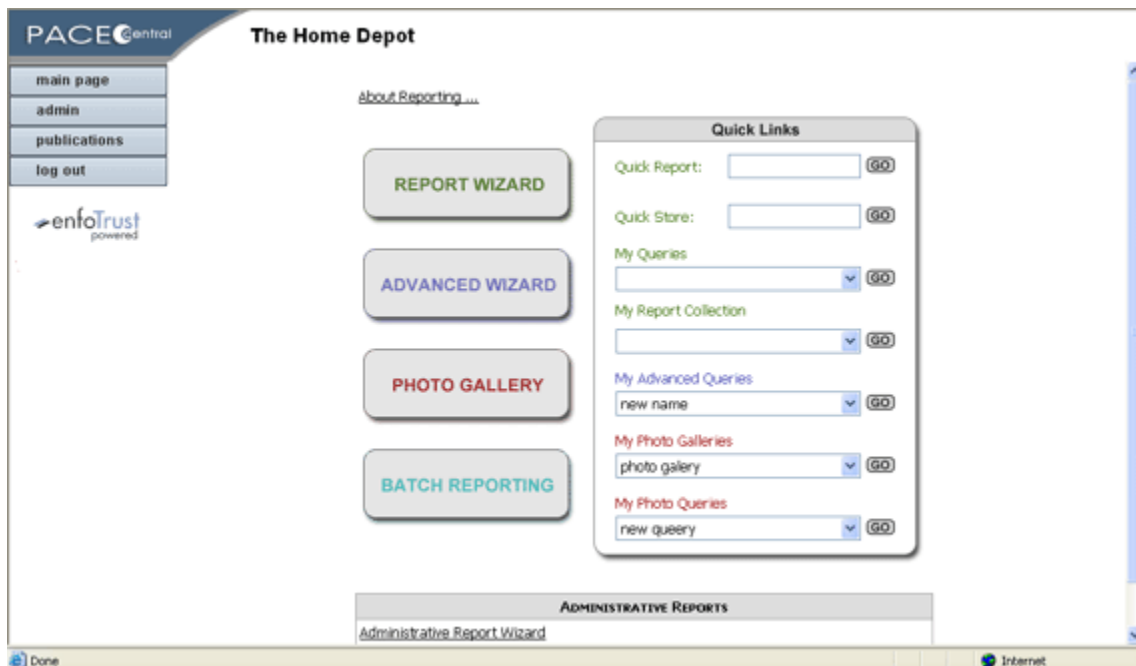
Reporting allows access to numerous views of information. In general, reporting refers to the process of presenting information for visual inspection. PACE Central presents many forms of reporting, including Quick-Link Reports, Report Wizards, and Detailed Analytical reports.

## Quick Links

Quick links provide instant access to essential information. Quick Links can be created and saved for anytime-access. Your website users can define their own quick links and post them for other users to view.

From PACE Central Main Page

Choose Reporting



Observe the Quick Links section of the main reporting page.

The specific quick link options presented will change based on the permissions assigned to the logged in user (see Admin. Permissions, Admin. Website Users).

The following sections describe the quick link options as they are presented above.

### *Quick Report*

Each worksheet generated by the PACE Pocket PC is assigned a unique report number.

When you enter a report number in Quick Report, the detailed worksheet, complete with pictures and signatures, is presented for immediate review.

**Quick Links**

- Enter any known report number into **Quick Report** and click **[GO]**.
  - Only valid report numbers will be recognized.
  - The logged in user must have adequate permissions to view the report as requested. For example, a Rep may view reports they generated but may not view reports generated by other reps. A vendor guest may view reports associated with their vendor lines only.
- To print the detailed report, Right-Mouse Click on the report and select Print (as illustrated above).
- To expand the photo section of any question, click the Magnifying Glass Icon and indicate the desired picture size.

**Quick Store**

Quick Store provides immediate access to activity and scheduling information for the store number you enter. Use Quick Store when you want to see what's happening at any store.

- Enter any known store number into **Quick Store** and click **[GO]**.
  - Only valid store numbers will be recognized.

On initial load, Quick Store identifies store location information, reps assigned to the store, all store service activity for the past 30 days and references to any schedule containing scheduled tasks to be performed in the selected store.

- You can change the selected store number at any time.
- You can change the date range of interest at any time.
- Click **[REFRESH]** to update Quick Store to reflect your changes.
- Click on the report number value to view the actual worksheet detail report.
- Select from Schedules and click **[VIEW]** to view the scheduled detail associated with the active store.

**My Queries**

My Queries contains a list of all report wizard queries previously saved to your personal list of queries. You can save your own queries for anytime-access, or other users with post query permission can place queries into your list of saved queries.

- Select any saved query from the list of available queries and click **[GO]**.
- Provide the desired date range for the query and click **[GO]**.

As illustrated, the quick link query provides a list of activity associated with the saved query and the new date range. You can click on any report number to view the actual worksheet detail report.

**As an overview:**

- The listed items can be sorted by clicking on any column heading.
- The query result can be saved again as a new .My Query.
- You can post this query to other users if your personal permissions allow this capability.
- Use **<< back to main reporting page** to return to reporting.

***My Advanced Queries***

My Advanced Queries contains a list of any advanced report wizard query previously saved to your personal list of advanced queries. You can save your own advanced queries for anytime-access, and other users with post advanced query permission can place advanced queries into your list of saved queries.

- Select any saved query from the list of available queries and click **[GO]**.
- Provide the desired date range for the quick link query and click **[GO]**.

As illustrated, the quick link advanced query provides a statistical summary of activity specified by the saved query and the new date range.

**As an overview:**

You can expand each section of the report to view details by clicking **Show Details**.

- You can change the level of detail shown by using the **Detail Grouping By:** option.
- The query result can be saved again as a new .My Advanced Query.
- You can post this query to other users if your personal permissions support this capability.
- Use **<< back to main reporting page** to return to reporting.
- Use the **Printer friendly** link to see the Print Preview and to print the report.

***My Photo Galleries***

A photo gallery is the saved, final product produced when using the Photo Gallery wizard. A photo gallery is a static finished document that may be viewed, printed, downloaded and even emailed to any email recipient. My Photo Galleries contains a list of any Photo Gallery Product previously saved to your personal list of photo galleries. You can save your own photo galleries for anytime-access, and other users with post photo gallery permission can place galleries into your list of saved photo galleries.

- Select any saved photo gallery from the list of available galleries and click **[GO]**.

As illustrated, the photo gallery identifies specific selection criteria, the worksheet picture question text, and lists photographs by store number.

**As an overview:**

- Double-Click the thumbnail image to enlarge a photograph.
- Select desired photo display size. The example above is set to half-sized photos.
- Use the File option on the menu to save the gallery to your local computer.

**Saving the Photo Gallery to your local computer**

While viewing any photo gallery, you can choose to save the gallery to your local computer or to any networked computer within your organization's domain. This is very useful when you want to have direct access to the actual image files. PACE Central stores images as .jpg files. When you save a photo gallery to your computer, all of the image files will be saved at the directory location of your choice and contained within a file folder named after the name of your photo gallery.

From the displayed menu bar at the top of the View Gallery Screen:

Choose File. Save As

- Provide a **Save in** location: My Pictures has been selected but you can choose any location available to you, including a networked device.
- Provide a **File name**: The default name is the name of your photo gallery. This name will be used to create the image folder containing all of the galleries. .jpg image files.
- **Save as type**: Make sure you select **Web Page complete (\*.htm, \*.html)**.
- Click **[SAVE]** to download the photo gallery.

The photo gallery is now available for you to work with of-line.

***My Photo Queries***

My Photo Queries contains a list of any photo query previously saved to your personal list of photo queries. You can save your own photo queries for anytime-access, and other users with post photo query permission can place photo queries into your list of saved queries.

A photo query is the complete list of selection criteria that was used to generate a specific Photo Gallery Product. By saving your photo query, you'll save time and add consistency whenever you release an updated version of the photo gallery product.

- Select any saved query from the list of available photo queries and click **[GO]**.
- Provide the desired date range for the quick link query and click **[GO]**.

As illustrated, the photo query identifies specific selection criteria, the worksheet picture question text, and lists photographs by store number. A

more detailed description of the photo query result is presented in the reporting section covering Wizards and the Photo Gallery.

**As an overview:**

- Double-Click the thumbnail image to enlarge a photograph.
- Uncheck any picture to omit the picture from the saved Photo Gallery.
- Uncheck all pictures for any report to omit the report from the saved Photo Gallery.
- You can save the query to your personal list of photo queries and post the query for other users to explore.