



ISS Reporting

Report Wizard

## **User Guide**

EnfoTrust Networks, Inc

November 14, 2005

## Table of Contents

About this Guide .....	3
User Guide -November 2005 .....	3
Conventions Used in this Guide .....	3
Changes in this Edition.....	3
Notices, Terms, and Conditions .....	3
Reporting .....	4
Report Wizards .....	4
The Report Wizard Interface .....	4
Standard Report Wizard Interface .....	5
Divisions .....	5
Market .....	5
Stores .....	5
Vendors.....	5
Departments .....	5
Sheets Types.....	6
Sheets .....	6
Reps.....	6
Date Range.....	6
Saving Report Wizard Results for Anytime-Access.....	8

## About this Guide

### *User Guide -November 2005*

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

### Conventions Used in this Guide

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

### Changes in this Edition

Text describing changes.

### *Notices, Terms, and Conditions*

Copyright 2005 EnfoTrust Networks, Inc. All rights reserved.

No part of this publication may be reproduced or transmitted in any form or for any purpose without the express permission of EnfoTrust Networks, Inc. EnfoTrust Networks, Inc. may change the information contained herein without prior notice.

Copyright law and international treaties protect the computer programs described in this publication. Unauthorized use, reproduction, or distribution of this program, or any portion of it, may result in severe civil and criminal penalties, and will be prosecuted to the maximum extent possible under the law.

Some software products marketed by EnfoTrust Networks, Inc. contain proprietary software components of other software vendors.

Microsoft, Windows, and Internet Explorer are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

EnfoTrust™, EnfoTrust Networks™, PACE™, PACE Admin™, PACE Central™, PACE Mobile™, PACE OnSight™, PACE MultiSight™, PACE InStore™, PACE OutSell™, PACE Flex™, and Red Rover™ are trademarks of EnfoTrust Networks, Inc.

Seagate Crystal Reports™ is a trademark of Seagate Software, Inc.

All other product and service names mentioned are the trademarks of their respective companies. Data contained in this document serves informational purposes only. National product specifications may vary. These materials are subject to change without notice. EnfoTrust Networks, Inc. provides these materials for informational purposes only, without representation or warranty of any kind, and EnfoTrust Networks, Inc. shall not be liable for errors or omissions with respect to the materials. The only warranties for EnfoTrust Networks, Inc. products and services are those that are set forth in the express warranty statements accompanying such products and services, if any. Nothing herein should be construed as constituting an additional warranty.

## 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.

## Report Wizards

Report Wizards enable a virtually unlimited scope of reporting capability. By selecting those specific areas and items of interest, your final report product can be exactly matched to any level of required detail. The report wizard is used to allow custom views for Standard Reports, Advanced Question Queries and Photo Galleries.

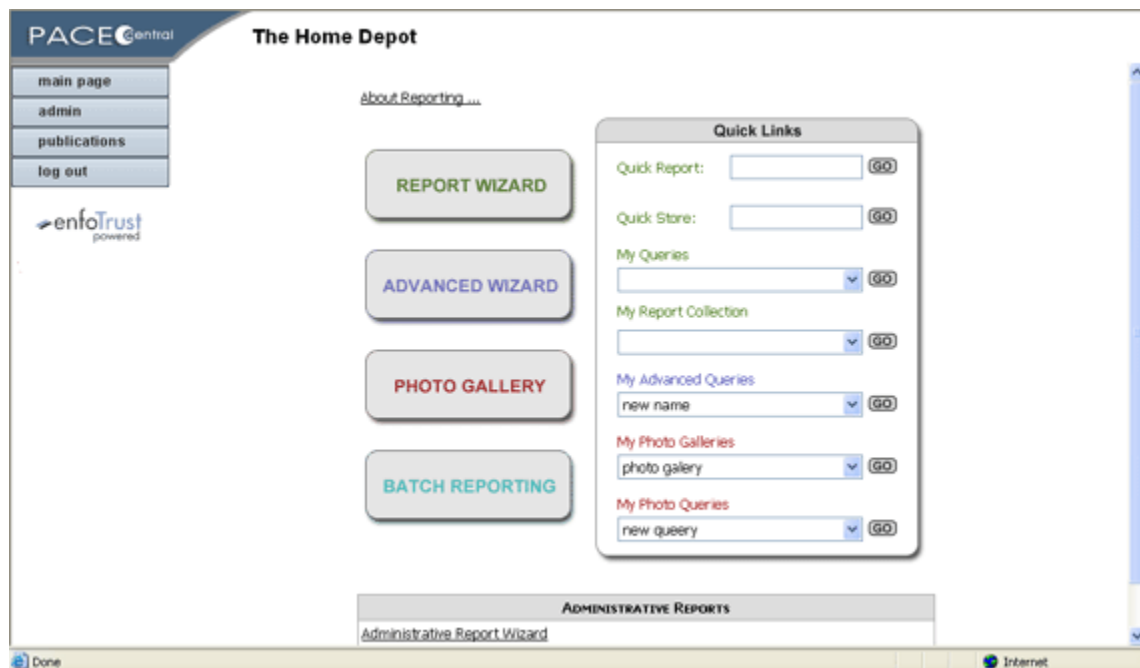
### *The Report Wizard Interface*

The report wizard provides two distinct interfaces. The standard report wizard interface presents a series of screens used to select the specific items to be included in the final report. The Integrated Filter Interface presents all relevant filter criteria on a single page, allowing instant filter and sort control over the wizard results. In general, each of the reporting areas that use the report wizard interface will behave in the same fashion.

Differences in the report wizard interface will be described within each reporting area section.

The report wizard appears when you activate Report Wizard, Advanced Wizard or Photo Gallery.

## Standard Report Wizard Interface



From the Main Reporting Page

Click *Report Wizard*.

The Standard wizard Interface provides the following filters:

### Divisions

Select from the list of your rep group division. Keep in mind that the organizational structure of the divisions is completely separate from the structure of your rep group.

### Market

Select from the list of markets displayed. The list of markets will be filtered based on the Chains and Rep Group Divisions previously selected.

### Stores

Select from the list of stores displayed. The list of stores will be filtered based on the Markets previously selected.

### Vendors

Select from the list of vendor lines displayed. The list of vendors will be filtered based on the Divisions previously selected.

### Departments

Select from the list of departments displayed. The list of departments will be filtered based on the collective department assignments of the vendors previously selected.

## Sheets Types

Select from the list of sheet types displayed.

## Sheets

Select from the list of sheet names displayed. The list of sheets will be filtered based on the sheet types previously selected.

## Reps

Select from the list of reps displayed. The list of reps will be filtered based on the Divisions, Stores and Departments previously selected.

## Date Range

### *Entering Date Ranges*

All of the report wizards will require a date range. The final report will reflect information based on both the item selection criteria and on activity performed within the date range you provide.

Use the Pick Date icon to select the desired dates. The date selection calendar allows the selection of any date.

- Use the Month drop down list to select or change the displayed month.
- Use the Year drop down list to select or change the displayed year.
- Click the day of the month to select.
- Click **[OK]** to select the indicated date.
- Click **[CANCEL]** to return to the date selection screen without selecting a date.

### *About Date Ranges*

- **Start Date:** All selected activity from this date forward will be included in the report.
- **End Date:** All selected activity from this date backward will be included in the report.
- If you only supply the Start Date, the report will include all activity from the start date through the date of last activity.
- If you only supply the End Date, the report will include all historical activity from this date and backwards through history.
- If the Start Date and End Date are the same date value, only activity for that day will be reported.
- If the Start Date is different from the End Date, only activity within the specified date range will be reported.

## Report Wizards

- Make sure that the Start Date entered is always less than or equal to the End Date entered.

Provide the date range to be used and click **[GO]** to view results.

**[Hide Filters]:** Click [Hide Filters] to shrink the filter area of the screen and expose more of the result set.

**[Show Filters]:** Click [Show Filters] to expand the integrated filter interface. When the filters are expanded, you can review or change your selections.

**[Sort By]:** Check any of the Sort-By check boxes to control the sort order of the result set. You can modify the sort order of the result set at any time.

The screenshot displays the Report Wizard interface with the following sections:

- Divisions:** Includes options like PMSI(Pacific), KSS(Midwest), TST(Southeast), CSI(Northwest), CSI(Pacific), MSS(Southeast), MSS(Southwest), and KSS(Midwest).
- Markets:** Includes ALL, ATLANTA, MIAMI/FTL/MPALM, ORL/MEL/DAYTONA, TAMPA/ST.PETE, SALT/MI/SELEANS, PHOENIX, and HOUSTON.
- Stores:** Includes ALL, HIALEAH, LAKE WALES, BOCA RATON, LAKE WORTH, WEST GARDEN, CUTLER RIDGE, and POMPANO BEACH.
- Vendors:** Includes ALL, Audio/Video (2705), Circuit Protection (2706), Conduit/Boxes/Fittings (2708), Consumer Electronics (2730), Data/Comm (2711), Extension Cords (2703), and Portable Air (2721).
- Departments:** Includes ALL, CM, CE, D, DZE, DZE Classes, DZL Classes, and MAP.
- Sheet Types:** Includes ALL, Cross-Merchandising, MAP, PK, and Set Integrity.
- Sheets:** Includes ALL, Storewide BOK, CMAP, DZE Conduit/Boxes/Fittng, CMAP-DZE Conduit/Boxes/Fittng, Div. Focus Mkt - April 2004 DZ, GSG-27, GSG-27 - Circuit Protection, and GSG-27 - Data Com 1 Bay Set. A.
- Reps:** Includes ALL, P, 27L, SE, Mike, Larry - (27L SE), Mike, Larry - (27L SE), Backup - (P, 27L NE), NW - (P, 27L NW), and PAC - (P, 27L PAC).
- Dates:** Start Date: 10/24/2005, End Date: 11/24/2005. Includes GO and CLOSE buttons.

Simply click **[GO]** to refresh the results.

As you make changes to your selection criteria, all of the following selection boxes are refreshed. Use the **[GO]** option to update the results section to reflect any new selection criteria.

The screenshot shows the Report Wizard interface with several filter sections: Divisions, Markets, Stores, Vendors, Departments, Sheet Types, Sheets, Reps, and Dates. A 'save as MY QUERY' button is visible above the results table. The results table contains three rows of data.

Select All	Report ID	Report Type	Date/Time	Division	Rep	Vendor	Store	Department	Market	Chain
<input type="checkbox"/>	1.24a.7.v10b16.d	GGG.27	4/15/2004	27E: MGS (Southeast)	Anderson, Phillip	27E Conduit/Boxes/Fittings	285	D07E Classes	2	THD-ESSE
<input type="checkbox"/>	1.24a.7.v12map4	GGG.27	5/11/2004	27E: MGS (Southeast)	Anderson, Phillip	27E Conduit/Boxes/Fittings	284	D07E Classes	2	THD-ESSE
<input type="checkbox"/>	1.24a.7.v12as8.g	GGG.27	5/11/2004	27E: MGS (Southeast)	Anderson, Phillip	27E Conduit/Boxes/Fittings	284	D07E Classes	2	THD-ESSE

### Saving Report Wizard Results for Anytime-Access

The Report Wizard Result pages allow you to save the result for use and viewing at any time. You can save the result to your personal list of queries and you can save the result for other uses to access.

- Click **[SAVE AS MY QUERY]** on the top of the results page.
- Enter the name for your query.
- Check who you want to save the query for:
  - **My User:** Save the query to my personal list of queries
  - **Other Users:** Post this query for other users to view.

The screenshot shows the 'Report Wizard' interface with a 'Saving Query' dialog box open. The dialog box has the following fields and options:

- Title bar: PACE - Saving Query - Microsoft Internet Expl...
- Text: Please provide a name for your query: [input field]
- Save for:  My user,  Other users
- Show only users of type: ALL USER TYPES [dropdown menu]
- Buttons: Save, Cancel

The background interface includes several filter sections:

- Divisions:** 26: PMSI(Pacific), 26: KSS(Midwest), 26: TST(Southeast), 27E: CSI(Northwest), 27E: CSI(Pacific), 27E: MGR(Southeast), 27E: MGS(Southwest), 27E: KSS(Midwest)
- Markets:** -- ALL --, 1 - ATLANTA, 2 - MIAMI/FTL/WPALM, 3 - ORL/MEL/DAYTONA, 4 - TAMPA/ST.PETE, 5 - ALBUQU. CLEANS, 6 - PHOENIX, 8 - HOUSTON
- States:** -- ALL --, 202 ( HIALEAH ), 203 ( LAKE WALES ), 204 ( BOCA RATON ), 205 ( LAKE WORTH ), 206 ( LUTHER BUCKS ), 207 ( CUTLER RIDGE ), 208 ( POMPANO BEACH )
- Vendors:** -- ALL --, 27E Audio/Video (2709), 27E Circuit Protectors (2708), 27E Conduit/Boxes/Fittings (2709), 27E Consumer Electronics (2708), 27E Data-Coms (2711), 27E Extension Conds (2703), 27E Portable Air (2721)
- Departments:** -- ALL --, C-CM, CH-CE, D, 007E, 007E Classes, 007L Classes, MAP
- Sheet Types:** -- ALL --, Cross-Merchandising, MAP, PK, Set Integrity
- Dates:** Start Date: 11/24/2000, End Date: 11/24/2005
- Buttons:** GO, CLOSE, HIDE FILTERS
- Table:**

Select	Report ID	Report Type	Date/Time	D
<input type="checkbox"/>	1.24a.2.v.10k16d	ISSG.27	4/15/2004	27E (S)
<input type="checkbox"/>	1.24a.2.v.2smap4	ISSG.27	5/11/2004	27E (S)
<input type="checkbox"/>	1.24a.2.v.2zsk8a	ISSG.27	5/11/2004	27E (S)
- Chain:** THD-SSSE, THD-SSSE, THD-SSSE

- Select the **User Type**.
- Check each user who is to receive the saved query.
- Click **[CANCEL]** to exit the post query feature without posting the query.
- Click **[SAVE]** to save the query, the words "Query saved successfully" appear in title.

Divisions:  sort by

Markets:  sort by

Stores:  sort by

Vendors:  sort by

Departments:  sort by

Start Date: 11/24/2000

End Date: 11/24/2005

Select	Report ID	Report Type
<input type="checkbox"/>	1,24a7.v10b16cb	ISSG.27
<input type="checkbox"/>	1,24a7.v02msqd	ISSG.27
<input type="checkbox"/>	1,24a7.v02ap8a	ISSG.27