Report Generator User Guide

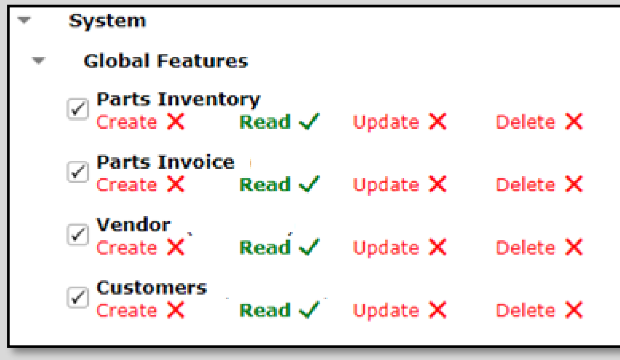
OverVUE

VUE comes equipped with powerful and useful daily, weekly, and monthly reports while recognizing that every dealership has unique requirements. You may customize reports in VUE to meet varied needs. Report Generator provides users a simplified, step-by-step process to create customized and repeatable reports.

Permissions

Report Generator must be enabled to use. Contact VUE Support to have the feature switch enabled. Report Generator must be assigned to each company separately.

Generally custom reports are needed by managers and may be assigned to those roles as needed. Users must have permissions enabled for the Report Generator and the Global Feature for each data source (Modules).



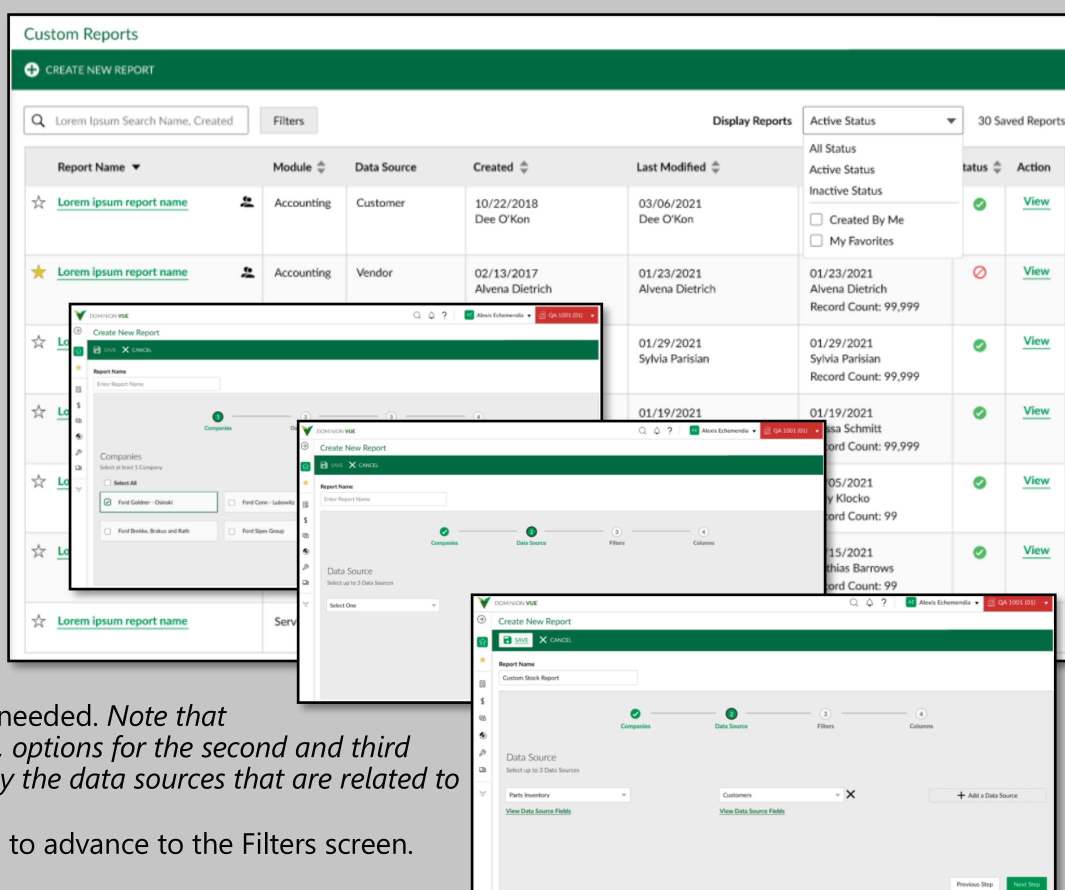
Create a New Report

Navigate to:

1. Accounting, Sales, Parts, or Service > Reports > Report Generator
2. Within the Report Generator screen, click the [**Create New Report**] button.

Within the Create New Report screen:

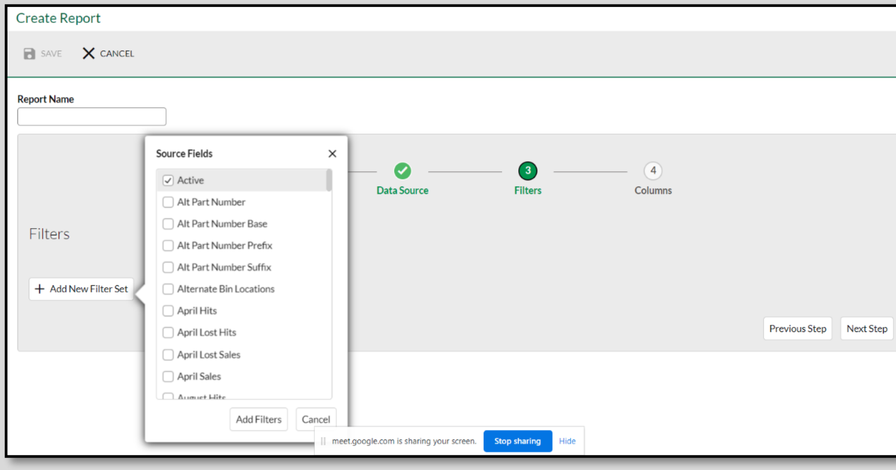
1. Enter a Report Name
2. Select the company or companies by marking the checkbox to include each company in the report.
3. Click the [**Next Step**] button to advance to the Data Source screen.
4. Use the dropdown to select a data source.
5. Select additional sources as needed. *Note that after a data source is defined, options for the second and third data sources adjust to list only the data sources that are related to initial data source selected.*
6. Click the [**Next Step**] button to advance to the Filters screen.



About Filters

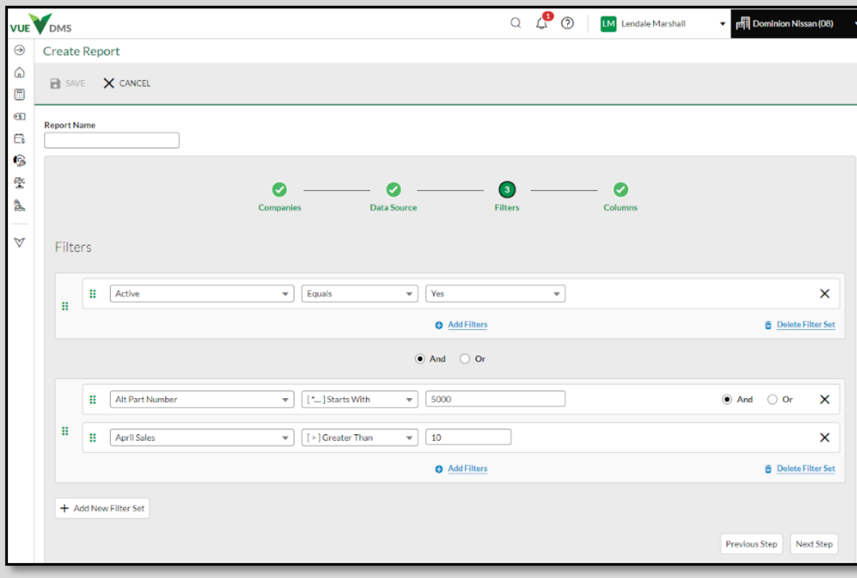
Terms:

- A *Filter* sifts the data source by the selected *Source Field*.
- A *Filter Statement lets* you choose to include, or exclude the data that matches your filter criteria.
- You may restrict the filtered data to a value such as Date Range, Unit Count or Cost.
- A *Filter Set* is a string of Filters connected with an "And" or "Or" criteria.

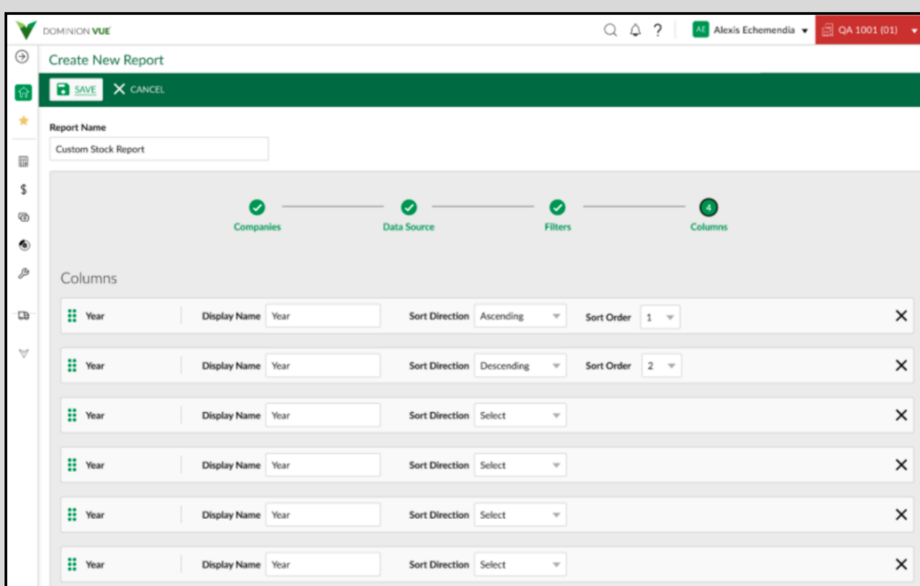


EXAMPLE: For a report that includes Active Alternative Part Numbers that start with the number 5000 and were sold in April for greater than 10 units.

1. Click the [**Add NEW Filter Set**] button.
2. Choose ***Active*** Source Field from the filter dropdown list.
3. Complete the Filter Statement by choosing ***Equals*** and ***Yes*** from their respective dropdown lists.
4. Turn the Filter Statement into a Filter Set by marking the ***And*** bullet.
5. Click the [**Add New Filter Set**] button.
6. Choose ***Alt Part Number*** from the dropdown.
7. Complete the Filter Statement by selecting ***Starts With*** and ***5000*** from the dropdowns.
8. Mark the ***And*** bullet.
9. Select ***April Sales*** filter from the dropdown and complete the statement with ***Greater Than*** and ***10***.
10. Click the [**Next Step**] button in the lower right hand corner to load the filtered data to a columns page.



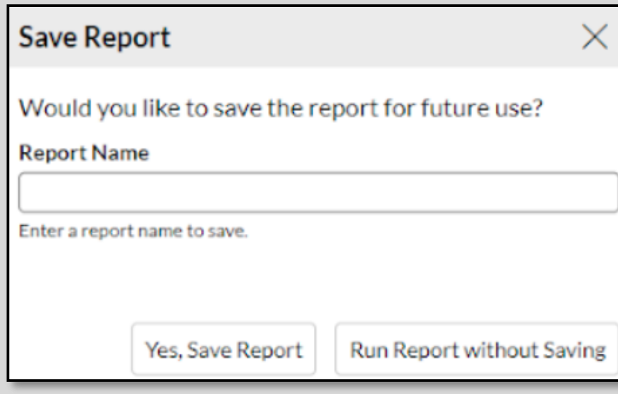
- The columns in the report are listed in the order they were defined in the Filter screen.
- Use the "X" to remove a column.
- Define the sort order. (ie: sort by this column first, then sort by this column second, etc.).
- The Display Name field is editable.
- Drag and drop your report columns in the order you want them to appear on the report.
- Click the **Add Column** link to add a column.
- Click the **Reset Default Columns** to return the columns to the default state.
- Click the **Remove All Columns** link to delete all columns and start over.

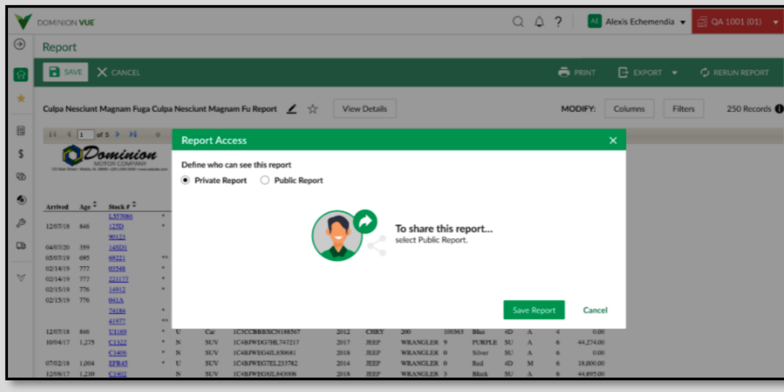


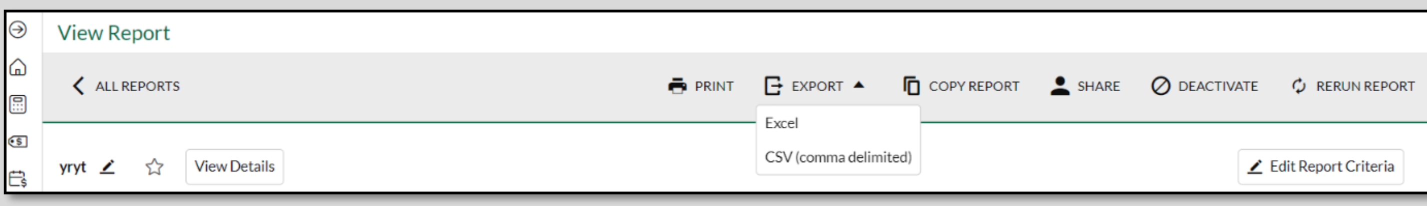
On the Columns page:

- Click the [**Run Report**] button. You are prompted to name the report and to:
    - [**Run the report without saving**]. This allows you to review the report.

    NOTE - To *Save* the report you must click the [**Save**] button in the Action Ribbon.
    - or click [**Yes, Save Report**].
- Click [**Save]** in the Action Ribbon to save the report parameters.
- Clicking the [**Cancel**] button removes all report parameters unless it has been saved.
- Reports may be marked as Private (only the creator can see the report) or Public (all users with Role based, or Employee based permissions).
- Click the [**Share Report**] button to share. Users that have permission to view are notified when the owner of the report changes a data source.
- After clicking the [**Run Report**] button you will be prompted to title the Report.
- Re-Run the report if new data has changed and you need to refresh the report to the latest available data from the View Report page.







On the View Report page:

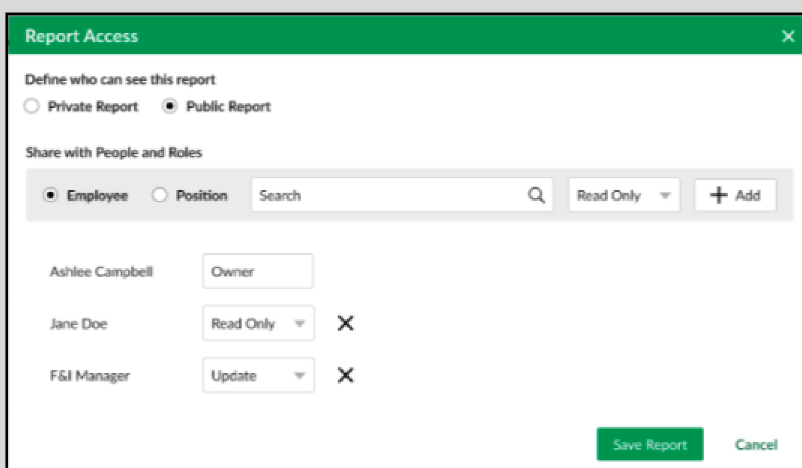
- Use the [**Export**] button in the Action Ribbon to create a CSV or XL file.

- Reports may be deactivated or reactivated if you saved the report.

- Clicking the [**View Details**] button displays Report Details.

- The [**History**] button provides a history of saved changes, including, Date, Username, and change(s) each time the report is saved.

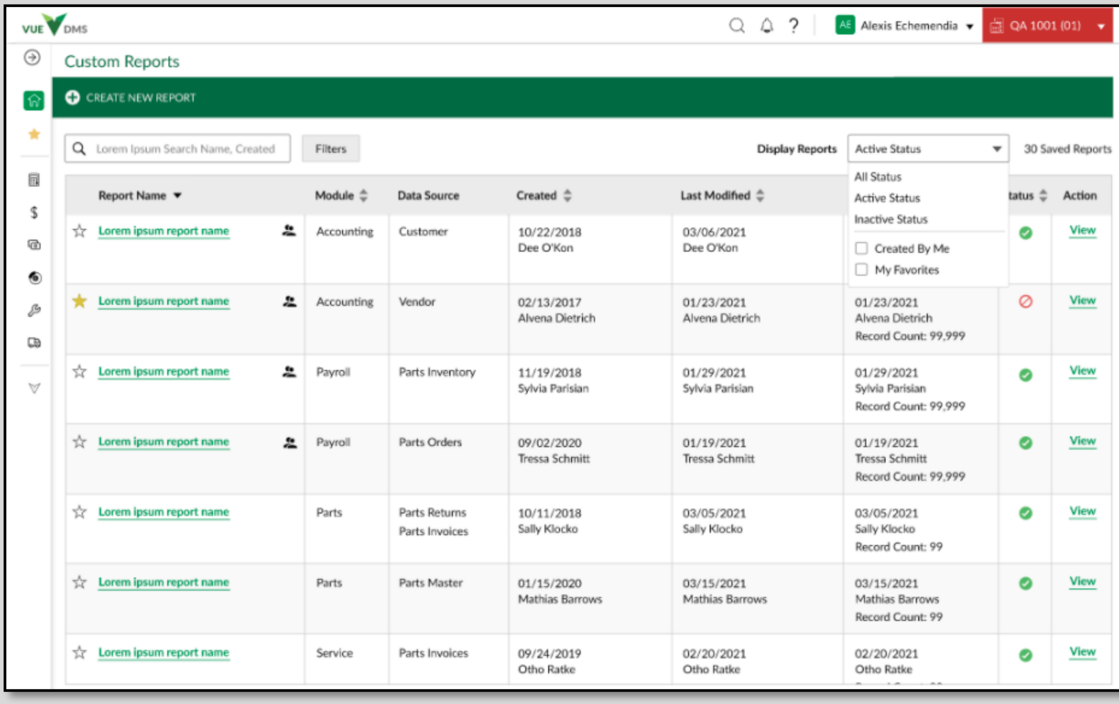
- In the Report screen, the report owner may grant access to specific employees or Roles in the dealership. To grant access:
    - Click the [**Share**] button in the Action Ribbon.
    - Mark the report as *Public*.
    - In the Share with People and Roles section, search for the employee or role.
    - Use the dropdown to grant *Read Only* or *Update* privileges.
    - Click the [**Add**] button to include your selection in the list of users.
    - Click the [**Save Report**] button.

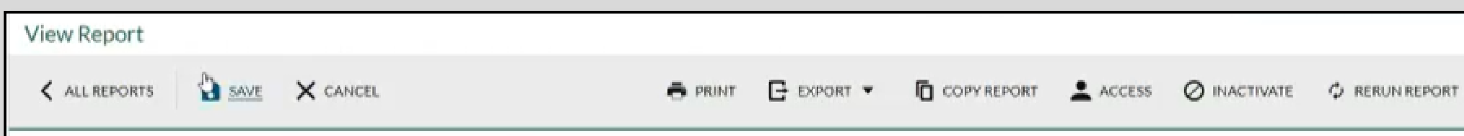


View an existing Report
Create a report using an existing report as a template

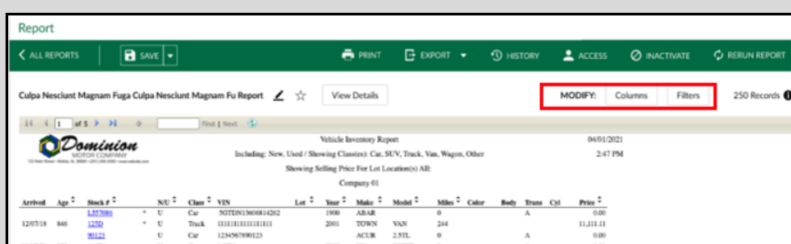
Navigate to:
1. Parts > Reports > Report Generator
2. Filter, Search, and Select an existing report from the grid.
   - Use the [**Filter**] button to further sort by Module and or Date.
     -Note that if more than one data source is defined, the Module is listed as *Common*.
   - Click on the grid header to sort by that column.
   - Click the up and down arrows to change the sort direction.
   - Click the Star icon to the left to mark a report as a Favorite.
   - Limit the search by *Status, Created by Me, or My Favorites*.

3. Click the **View** link in the Action column to the right, to open the report.





4. You may use the [**Copy Report**] button to act as a template to make a variation of the original report.
5. Within the Custom Reports screen (see above), click the Report Name to open the report.
6. Within the Report screen (with proper permissions in place) you may:
   -Print the report.
   -Export the report.
   -Check the report change history.
   -Grant and rescind access to the report.
   -Inactivate or activate a report.
   -Rerun a report to refresh the data.
   -Modify or Edit the saved report.
   -Edit the Report Name by clicking the pencil icon next to the report name. You must click [**Save**] in the Action Ribbon to save a name change.
   -Mark as Favorite by clicking the star icon.



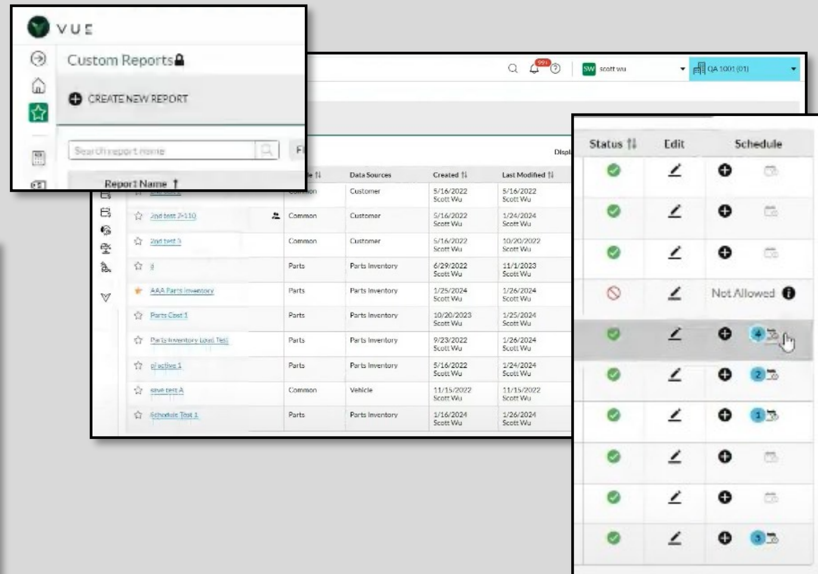
7. Click [**Save**] in the Action Ribbon to save the new report.

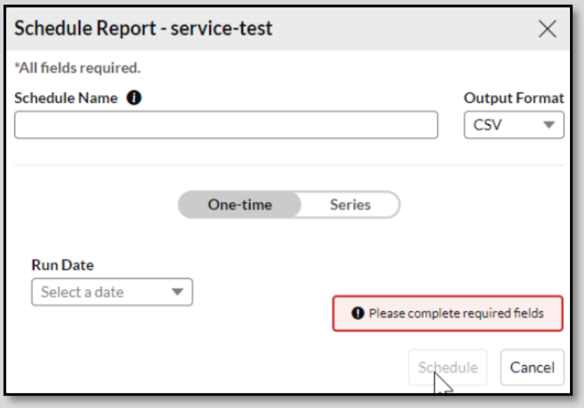
Schedule a report to run at a later date

1. After creating a report in Report Generator, you are able to schedule the report to run automatically at a future date, or run a number of scheduled times as needed. When the report has run, the owner of the report is notified that the report has run successfully and is ready to be downloaded.

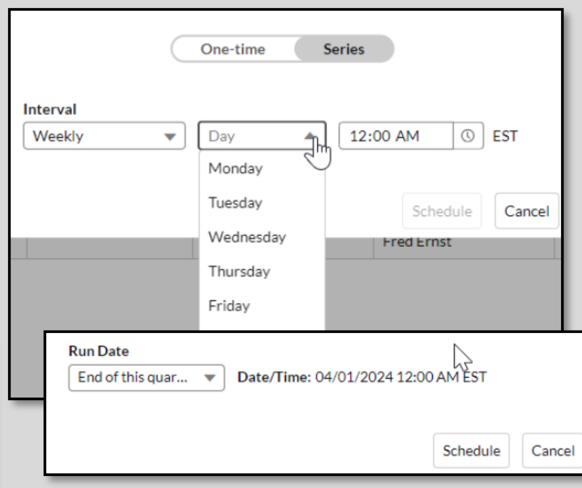
Navigate to:

1. Accounting, Sales, Parts, or Service > Reports > Report Generator
2. Search for the report by report name.
   Note: *You must be the owner of the report to create or cancel a scheduled report.*
4. Click on the (+) icon in the Schedule column to create a schedule to run that report.





5. Input a unique Schedule name. The Report name will be added to the Schedule name as a prefix.
6. Select the scheduled report output from the dropdown. Choose CSV or Excel format.
7. Select to run the report one-time or to run it for a series of dates.
8. Select an interval for the series of reports to run. Define the interval, day, and time of day.
9. Once all required fields are complete, click the [**Schedule**] button in the lower right.



- A notification is sent to the report owner each time the scheduled report is run. Click the notification bell icon to open and manage your notifications.
- Clicking on the calendar icon in the Schedule column of the Custom Reports screen, opens the Scheduled Instances window which displays the schedule name, interval, next and last run, and status.
- The report owner may use the "X" icon to cancel future occurrences.
- Hover over the truncated name to see the full name.
- You will be alerted if you try to edit a report that has been scheduled.