



VUE

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).

System				
Global Features				
<input checked="" type="checkbox"/>	Parts Inventory	Create <input checked="" type="checkbox"/>	Read <input checked="" type="checkbox"/>	Update <input checked="" type="checkbox"/> Delete <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Parts Invoice	Create <input checked="" type="checkbox"/>	Read <input checked="" type="checkbox"/>	Update <input checked="" type="checkbox"/> Delete <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Vendor	Create <input checked="" type="checkbox"/>	Read <input checked="" type="checkbox"/>	Update <input checked="" type="checkbox"/> Delete <input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Customers	Create <input checked="" type="checkbox"/>	Read <input checked="" type="checkbox"/>	Update <input checked="" type="checkbox"/> Delete <input checked="" type="checkbox"/>

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:

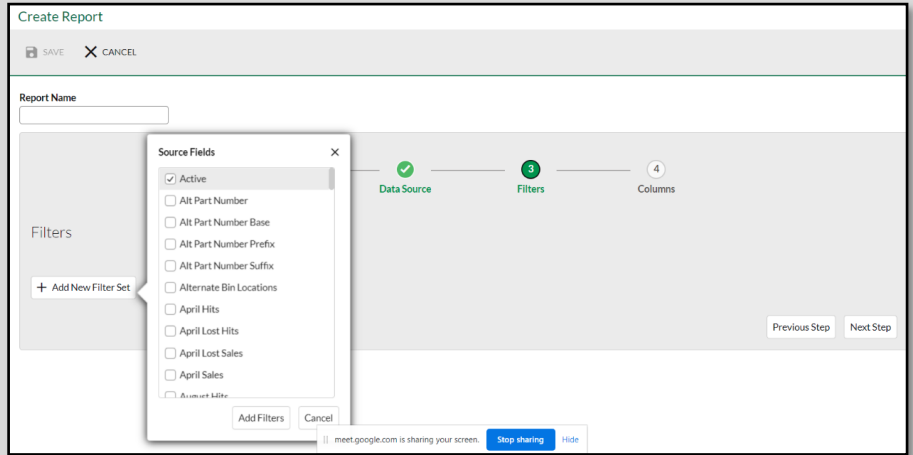
1. Enter a Report Name
2. Select the company or companies by marking the checkbox to include each company in the report.
3. Click the **[Next Step]** button to advance to the Data Source screen.
4. Use the dropdown to select a data source.
5. Select additional sources as needed. *Note that after a data 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.

The screenshot displays the 'Custom Reports' interface. At the top, there is a 'CREATE NEW REPORT' button. Below it is a search bar and a 'Filters' button. The main area shows a table of reports with columns for Report Name, Module, Data Source, Created, Last Modified, and Action. Three overlapping dialog boxes are shown, illustrating the steps to create a new report: 1. Entering a report name, 2. Selecting companies, and 3. Selecting data sources.

About Filters

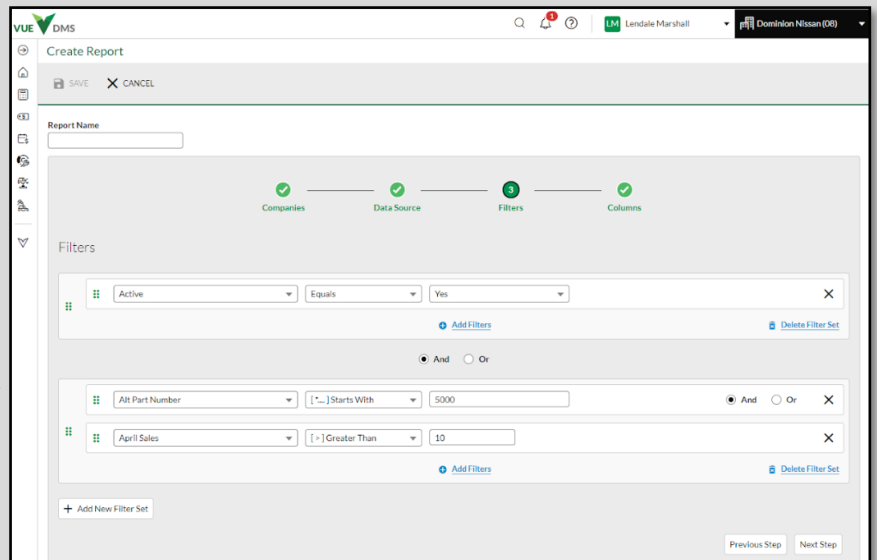
Terms:

- 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.

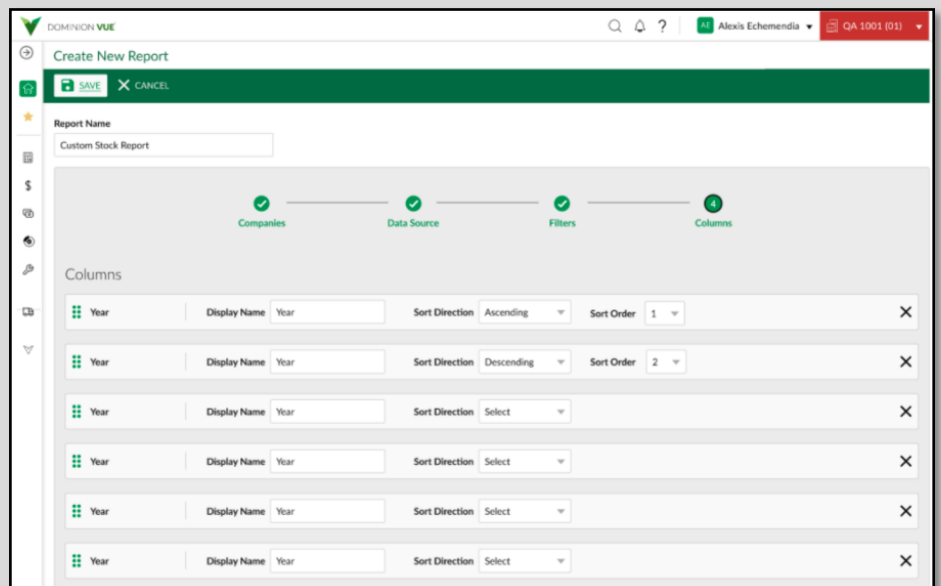


EXAMPLE: For a report that includes **Active Alternative Part Numbers** that start with the number **5000** and were sold in **April** for **greater than 10** units.

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.



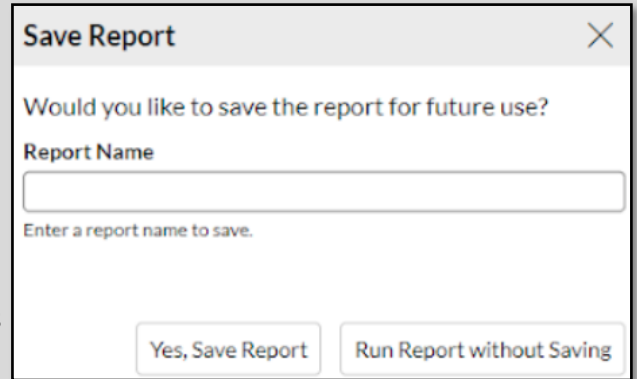
- The columns in the report are listed in the order they were defined in the Filter screen.
- Use the "X" to remove a column.
- Define the sort order. (ie: sort by this column first, then sort by this column second, etc.).
- The Display Name field is editable.
- Drag and drop your report columns in the 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.



Report Generator

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.



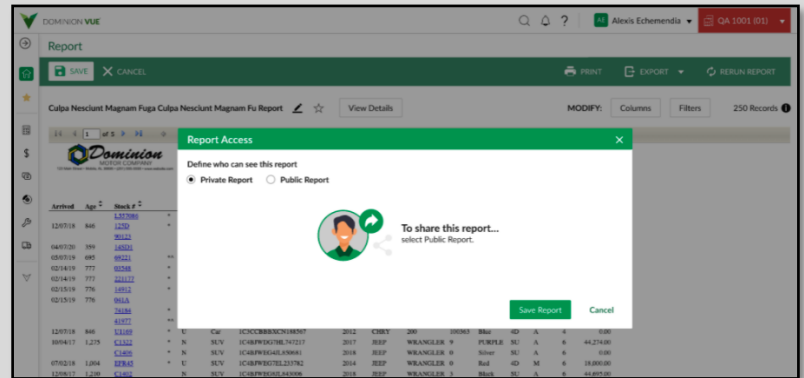
Save Report [X]

Would you like to save the report for future use?

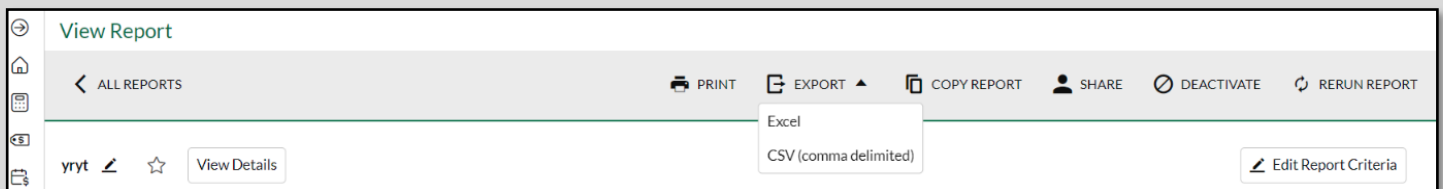
Report Name

Enter a report name to save.

Yes, Save Report Run Report without Saving



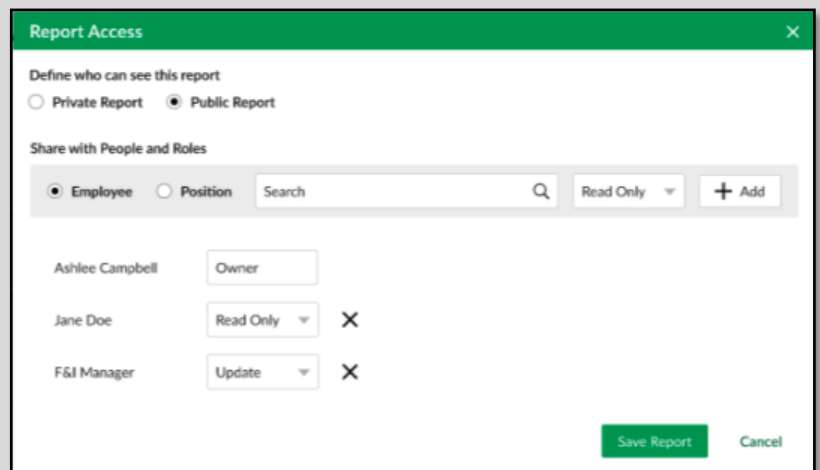
The screenshot shows the 'Report' page with a table of reports. A 'Report Access' dialog box is open, allowing the user to define who can see the report. The dialog has two radio buttons: 'Private Report' (selected) and 'Public Report'. Below the radio buttons, there is a section for sharing the report with people and roles, including a search bar and a list of users with their roles and access levels.



The screenshot shows the 'View Report' page. The Action Ribbon includes buttons for PRINT, EXPORT, COPY REPORT, SHARE, DEACTIVATE, and RERUN REPORT. The 'EXPORT' dropdown menu is open, showing options for Excel and CSV (comma delimited). There is also a 'View Details' button and an 'Edit Report Criteria' button.

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.



The screenshot shows the 'Report Access' dialog box. The 'Public Report' radio button is selected. The 'Share with People and Roles' section is visible, showing a search bar and a list of users with their roles and access levels. The list includes Ashlee Campbell (Owner), Jane Doe (Read Only), and F&I Manager (Update). There are 'Add' and 'Remove' (X) buttons for each user. At the bottom, there are 'Save Report' and 'Cancel' buttons.

Report Generator

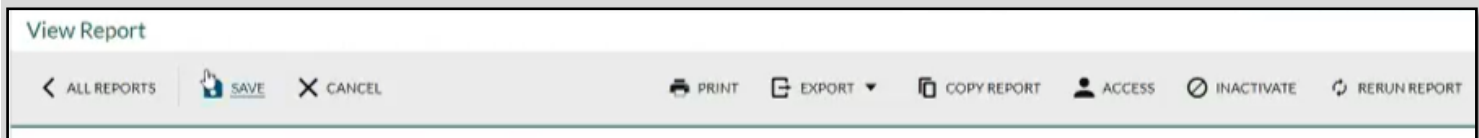
View an existing Report

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.

Report Name	Module	Data Source	Created	Last Modified	Action
☆ Lorem ipsum report name	Accounting	Customer	10/22/2018 Dee O'Kon	03/06/2021 Dee O'Kon	View
★ Lorem ipsum report name	Accounting	Vendor	02/13/2017 Alvena Dietrich	01/23/2021 Alvena Dietrich	View
☆ Lorem ipsum report name	Payroll	Parts Inventory	11/19/2018 Sylvia Parislan	01/29/2021 Sylvia Parislan	View
☆ Lorem ipsum report name	Payroll	Parts Orders	09/02/2020 Tressa Schmitt	01/19/2021 Tressa Schmitt	View
☆ Lorem ipsum report name	Parts	Parts Returns Parts Invoices	10/11/2018 Sally Klocko	03/05/2021 Sally Klocko	View
☆ Lorem ipsum report name	Parts	Parts Master	01/15/2020 Mathias Barrows	03/15/2021 Mathias Barrows	View
☆ Lorem ipsum report name	Service	Parts Invoices	09/24/2019 Otho Ratke	02/20/2021 Otho Ratke	View



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.

Arrived	Age	Stock #	VIN	Class	Y/N	Lot	Year	Make	Model	Miles	Color	Body	Trans	Cyl	Price
12/17/18	846	1420	507EN130881202	Cv		1900	1900	ABAR	0		A				0.00
12/17/18	846	1420	111111111111111	Truck		2004	2004	TRUK	204			A			11,111.11
14/07/20	359	1420	122406999623	Cv		2008	2008	KCRB	2,275	0		A			6.00
14/07/20	359	1420	14801	Cv		2008	2008	KIA	FORTE	0		A			0.00

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

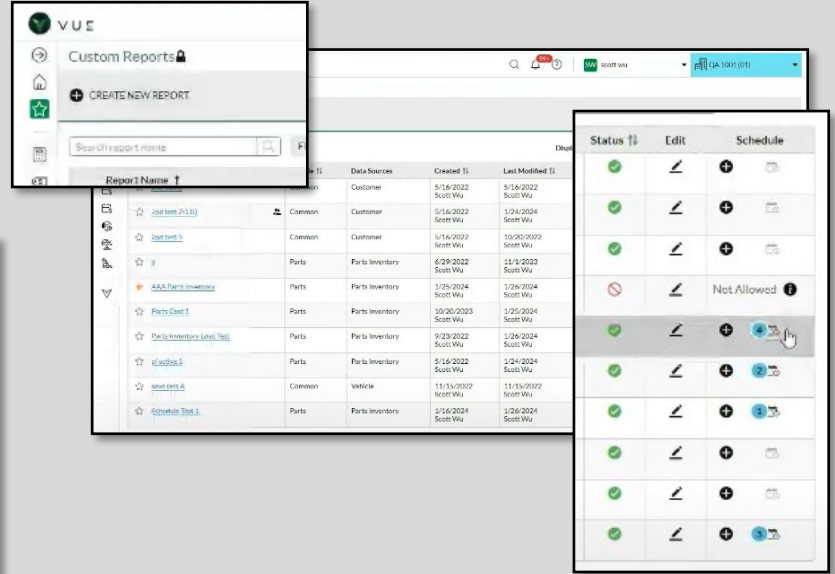
Report Generator

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.



Schedule Report - service-test

*All fields required.

Schedule Name

Output Format: CSV

One-time | Series

Run Date: Select a date

Please complete required fields

Schedule Cancel

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.

One-time | Series

Interval: Weekly | Day | 12:00 AM | EST

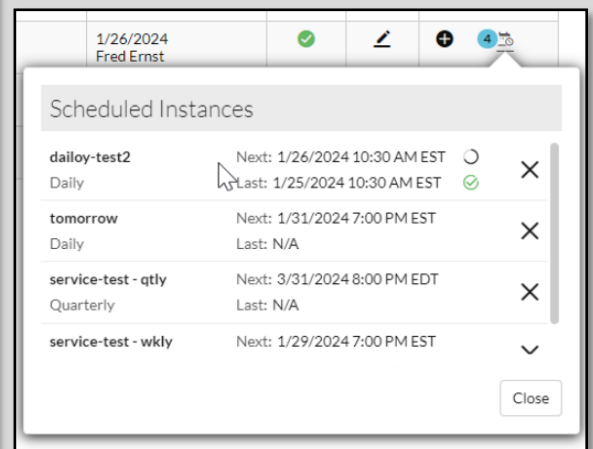
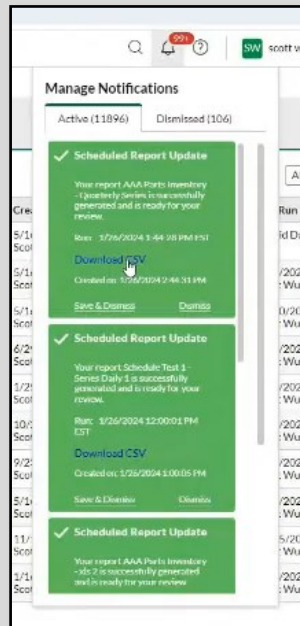
Monday | Tuesday | Wednesday | Thursday | Friday

Schedule Cancel

Run Date: End of this quarter | Date/Time: 04/01/2024 12:00 AM EST

Schedule Cancel

- 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.



i This report contains scheduled instances, and any alterations to the report criteria will affect the scheduled instances.