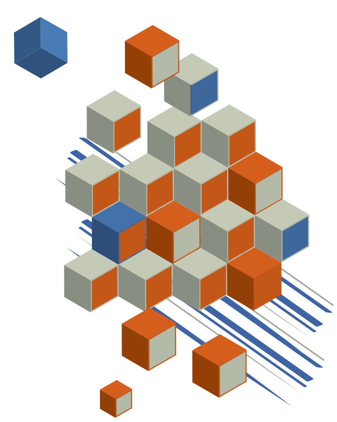
Custom Reports

SIMMS Inventory Management Software 2012

March 12, 2012



Contents

Custom Reports

SIMMS comes with many reports. These reports are referred to as internal reports. You can customize SIMMS' internal reports using Crystal Reports. Customized reports are classified in the following ways:

- **External Reports**
  These customized reports are saved to a single workstation. They are not available to other workstation unless you make a copy of the report and save it to that other workstation's RPT folder.
- **Published Reports**
  These customized reports are published to all workstations. So, unlike external reports, published reports are available to everyone.
- **Report Templates**
  These customized reports are reports designed to use with a specific customer or vendor. Like external reports, they are only available to the workstation they are saved to.

You can use a combination of, internal, external, or published reports. In the User Manager you can determine which user has access to which report type—internal, external, or published. In this way some users might have access to external reports while other might have access to published reports or only SIMMS' internal reports.

In addition to customizing SIMMS' internal reports, you can create your own reports that are not based on any of SIMMS internal reports. These reports are called user custom reports.

External Report

You can use customized external reports instead of SIMMS' standard internal reports. These customized external reports are only available on the workstation they are saved on. They are not available on other workstations unless you copy and save the report to that other workstation.

When you customize an internal report, SIMMS saves that report to C: Program Files > KCSI > SIMMS > RPT.

If you want to return to using SIMMS default internal reports delete the customized report in the RPT folder.

Enable External Reports

To use external reports you need to enable this feature in Global Settings.

1. Open the **Setup** menu, and then click **Global Settings**.
2. On the **Reports** tab, click **Use External Editable Reports Instead of Internal Reports**.

Customize a Report

***Note**: Do not change the name of your customized report. SIMMS cannot recognize the report if you change its name.*

1. Open the **Reporting** menu, open the **Reports Center** sub-menu, and then click **Reports Center**.
2. Select the report you want to customize, and then click **Customize**.

   Your report opens in Crystal Reports.
3. Customize and save your report.

   Your customized report is saved in your workstation's RPT folder.

Published Reports

You can publish a customized report to all workstations. So, unlike external reports, published reports are available to everyone. Published reports are added to your company's database.

***Caution**: To prevent users from unintentionally publishing a report restrict access to this feature in the User Manager.*

Enable Published Reports

To use published reports you need to enable this feature in Global Settings.

1. Open the **Setup** menu, and then click **Global Settings**.
2. On the **Reports** tab, click **Use External Editable Reports Instead of Internal Reports**.

Customize and Publish a Report

***Note**: Do not change the name of your customized report. SIMMS cannot recognize the report if you change its name.*

1. Open the **Reporting** menu, open the **Reports Center** sub-menu, and then click **Reports Center**.

2. Select the report that you want to customize, and then click **Customize**.

   Your report opens in Crystal Reports.

3. Customize and save your report.
4. Click **Publish**.

User Rights and Custom Reports

Restrict Access to Customizing and Publishing Reports

1. Open the **Administration** menu, click **User Manager**.
2. Select a user, and then click the **Edit** icon.
3. On the **User Rights** tab, expand **Reports**, expand **Report Centre Form**, clear the **Allow Customize and Publish** check box, and then click the **Save** icon.

   The result is the user cannot customize or publish reports.

Access to Custom Reports

You can specify which report type—internal, external, or published a user has access to.

1. Open the **Administration** menu, click **User Manager**.
2. Select a user, and then click the **Edit** icon.
3. On the **User Rights** tab, expand **Reports**, expand **Report Centre Form**, and then select one of the following options:
   - **Server**
     SIMMS uses the published server version of a report. However, if you already have a local version of the report and you have the right to customize and publish reports, a dialog appears asking if you want SIMMS to replace your local version of a report with the server version.
   - **Local**
     SIMMS uses the local version of a report. Local versions of a report are customized reports saved to your RPT folder. If there is no local version of the report, SIMMS uses its internal reports.
   - **SIMMS Internal**
     SIMMS uses its internal default reports.
4. Click the **Save** icon.

Report Templates

You can use unique versions of a report for different customers or vendors. For instance, you could have several unique invoices and assign them to different customers. Potentially you could customize and assign a unique invoice for each of your customers.

The following are the reports that you can customize and assign to either your customers or vendors:

Table 1: Reports You Can Customize for Templates

Reports:		
Invoice	Purchase Order	Picking Sheet
Sales Order	Quotes	Packing Slip
Receipt	Batch Invoice Printing	Bill of Lading

SIMMS creates unique folders in which you must add your report templates. There is a folder for each report type. For example, there is Sales Order folder for sales orders, a Purchase Order folder for purchase orders, and so on. You must add your report template to its corresponding folder. You do this in the Report Center.

You assign a report to a contact in either the Customer or Vendor Manager.

Enable Report Templates

To use report templates you must enable this feature in Global Settings.

1. Open the **Setup** menu, and then click **Global Settings**.
2. On the **Reports** tab, click **Use Report Templates, if available**, and then click **Save**.

Customize a Report

1. Open the **Reporting** menu, open the **Reports Center** submenu, and then click **Reports Center**.

   The Reports Center opens.

2. Select the report you want to customize, and then click **Customize**.

   Your report opens in Crystal Reports.

3. Customize your report and then save it with a unique file name.

   You could for example, add your contacts's name to the file name. This would make it easier for you to recognize who the report is for.

Add a Report Template

After you customize your report, you add the report to its corresponding folder.

1. Open the **Reporting** menu, open the **Reports Center** submenu, and then click **Reports Center**.
2. Click the **Report Template** tab, right click the type of report you want to add (such as a purchase order, sales order, invoice, and so on), and then click **Add Report**.
3. Click the **Ellipsis** adjacent to the **Select a Report Template** text box. Locate your customized report and then click **Open**.
4. Click the **Ellipsis** adjacent to the **Select a Report Image**. Locate the image, and then click **Open**.

   Typically this is a logo or other small image. It appears at the top left corner of your report.

5. In the **Report Name** text box, type a report name.
6. In the **Comment** box, type a comment.
7. Click **Add**.

Assign a Report Template to a Customer or Vendor

You can assign a report template to either a customer or vendor.

1. Open either the **Customer Manager** or **Vendor Manager**.
2. Select your contact, and then click the **Edit** icon .
3. On the **Templates** tab, in the available lists, select the report template you want to assign to your contact.

   For example, if the report you want to assign to your contact is a customized purchase order, in the **Purchase Order** list, select the report.

Each time you create a purchase order for your vendor, SIMMS uses the customized purchase order that you assigned to them.

4. Click the **Save** icon .

User Custom Reports

You can create your own custom reports and add them to SIMMS' Reports Center. Note these reports are not customized versions of SIMMS' internal reports, rather they are reports you design yourself in Crystal reports.

Add a User Custom Report to the Report Center

1. Open the **Reporting** menu, open the **Reports Center** sub-menu, and then click **Reports Center**.
2. Click the **User Custom Report** tab, right click in the pane, and then click **Add a Report**.
3. Click the **Ellipsis** ... adjacent to the **Select a Custom Report** text box. Locate your custom report and then click **Open**.
4. Click the **Ellipsis** ... adjacent to the **Select a Report Image**. Locate your image, and then click **Open**.

   Typically this is a logo or other small image. It appears at the top left corner of your report.
5. In the **Report Name** text box, type a report name.
6. In the **Comment** box, type a comment.
7. Click **Add**.