

CSOFT Reporting

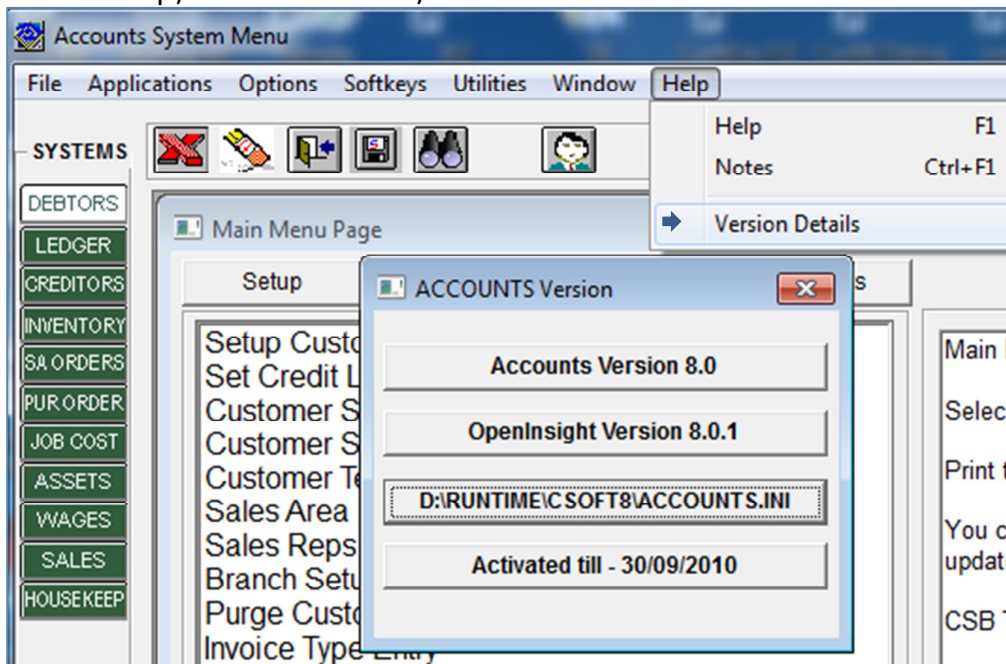
Version 8 and before.

We have developed a realtime reporting and dash board system that will allow the user to:

1. Create reports to be printed /emailed on a daily basis.
2. View a list of tasks to be done on a daily/weekly/monthly/annual basis.
3. Record dates when reports are created/send.
4. Reports can be emailed on a regular basis based provided a separate engine is loaded.

To enable reports to be queued or saved the ini file needs changing as follows:

Select Help, version details, and click on ini file.

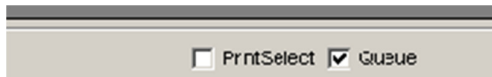


In the Ini file add a line under startup as follows:

```
[Startup]
Update_time,0
Printselect,1
Printjob,1
```

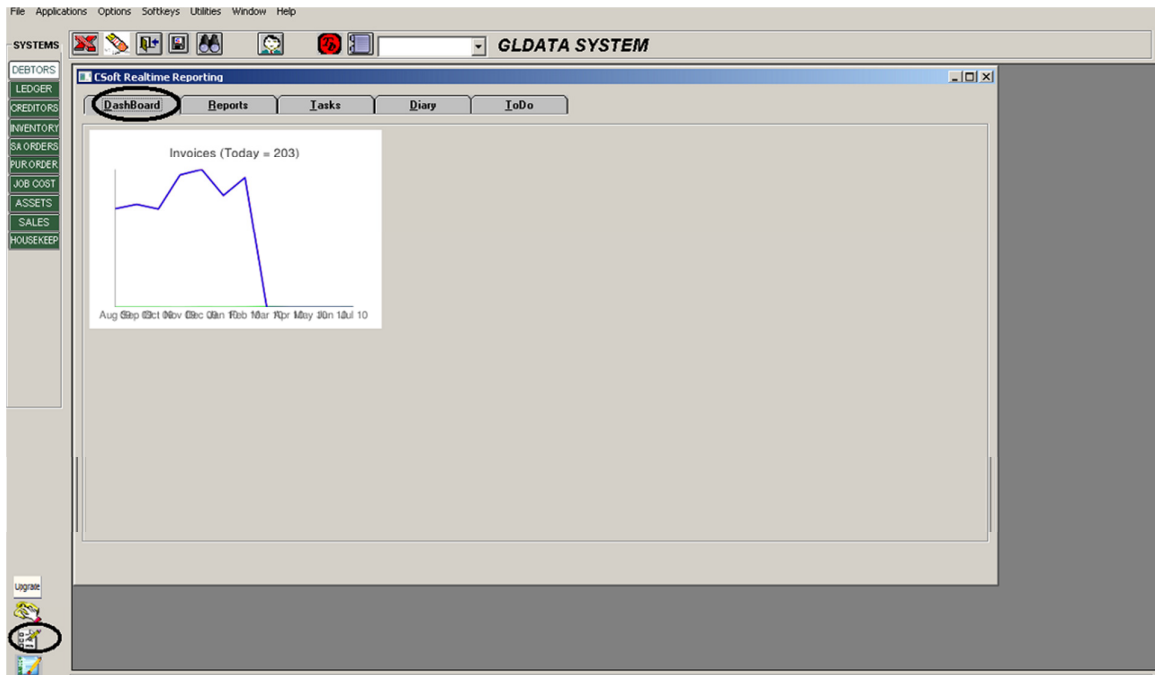
Then save the ini file.

Next time you login in tyou should now see the following at the bottom of your system:



Whenever a report need to be queued or saved you can click the Queue box.

The main reporting screen can be accessed from the main system menu bottom left as follows:



This will open the reporting screen.

From this screen you can view

1. Your dashboards created
2. Reports
3. Tasks
4. Diary
5. ToDo lists

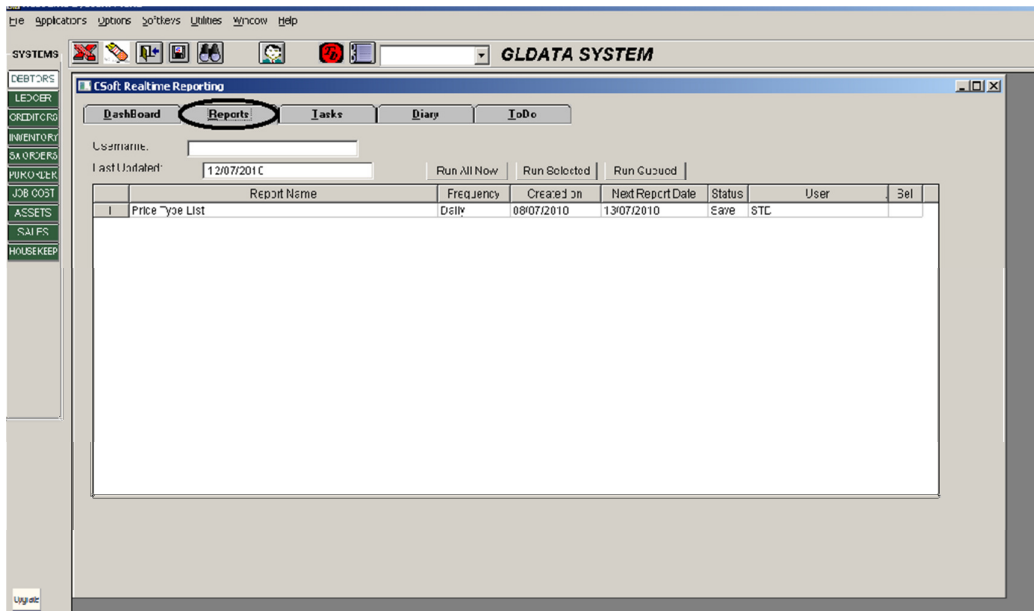
In version 9.2 and above we have a full web based dashboard you will be able to access via the web.

We will also have a full Microsoft Outlook interface available for your diary and tasks lists, and possibly the todo list as well.

Reports can only be added via the print queue option.

Tasks can only be added via the options provided in the Tasks Tab. This can related to menus to be accessed or simple tasks to be completed.

Report sample

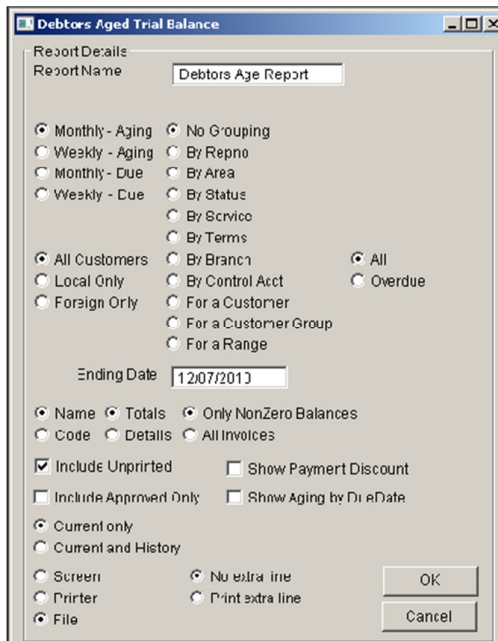


In the above sample a report is displayed created by the queue option. You can select in the last column, then print the selected report. If the report was queued and not saved, you can run the queued reports now. All reports can be run at the same time.

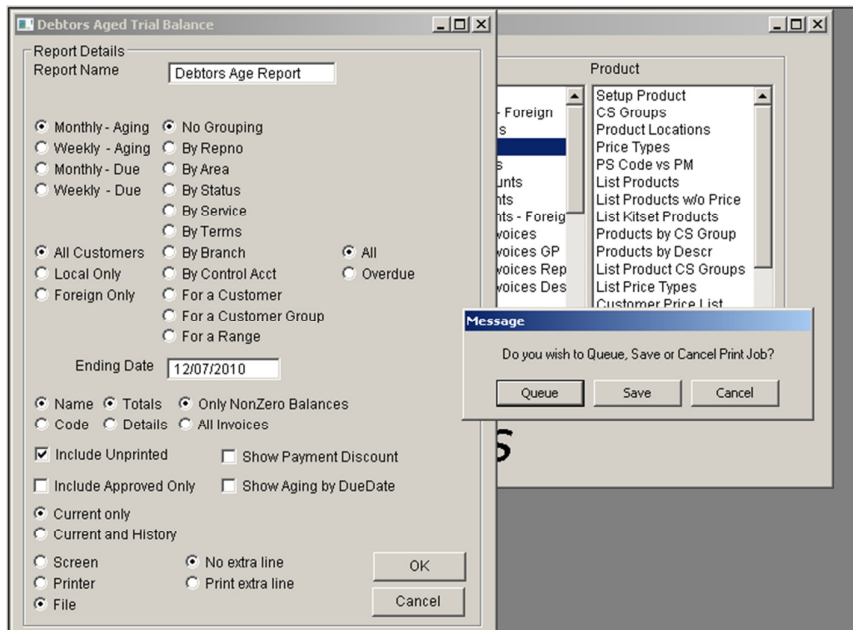
If you set up standard reports you want on a daily basis, then you can run them each morning by selecting run all now. This saves time in going to each report to run them, and you won't forget to run one or more reports.

To view more details on the report setup double click on the report.

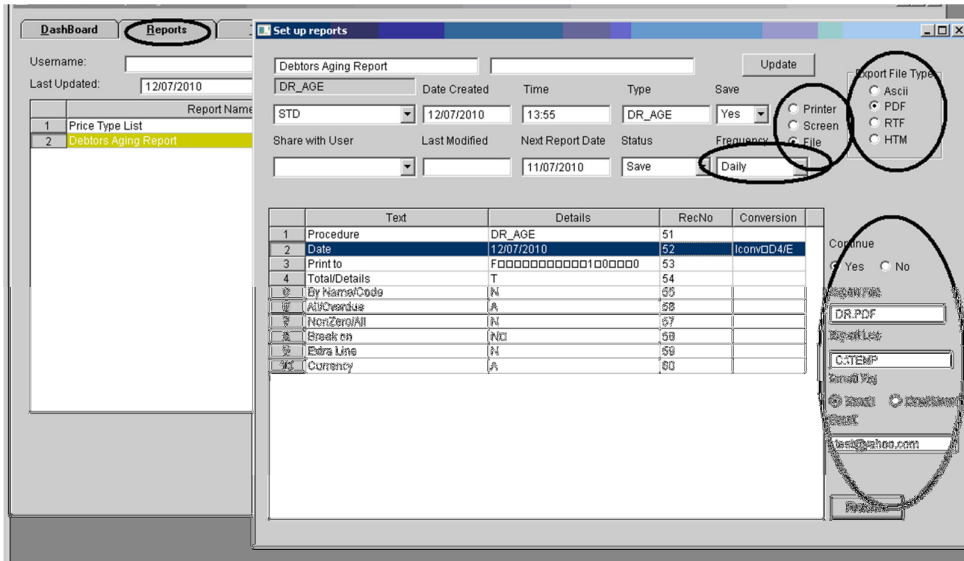
Below is a series of screen shots displaying the queuing of the debtors aged report, viewing and changing the relevant details on the report.



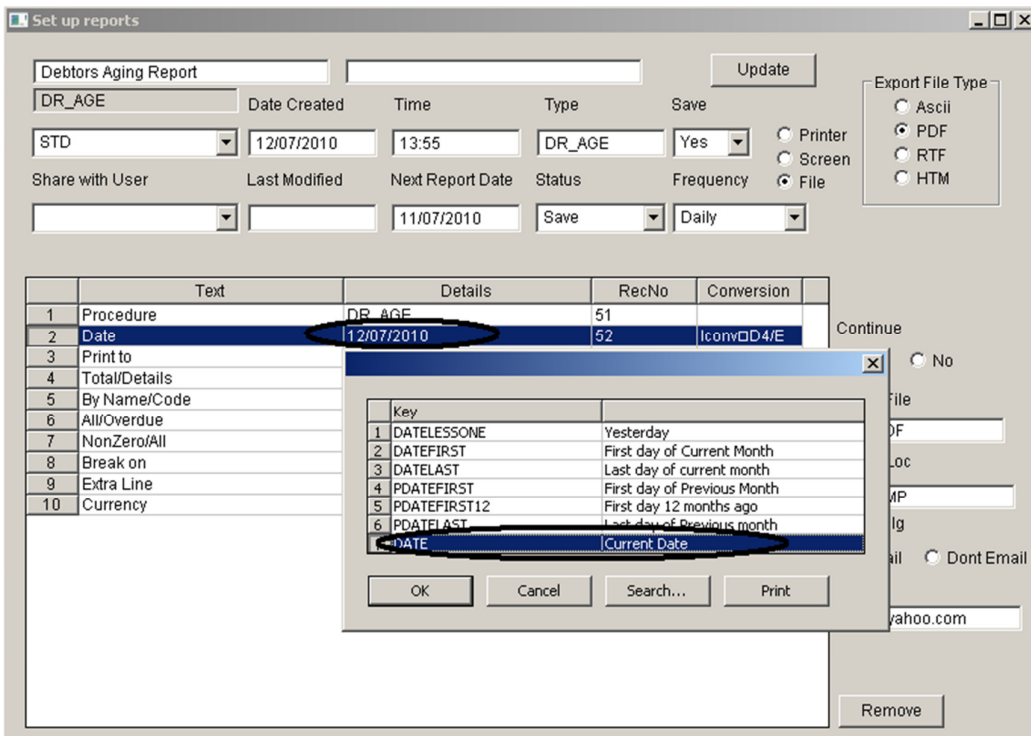
Then you should see the following:



Once the report is created you can now change it as follows by double clicking on the report:

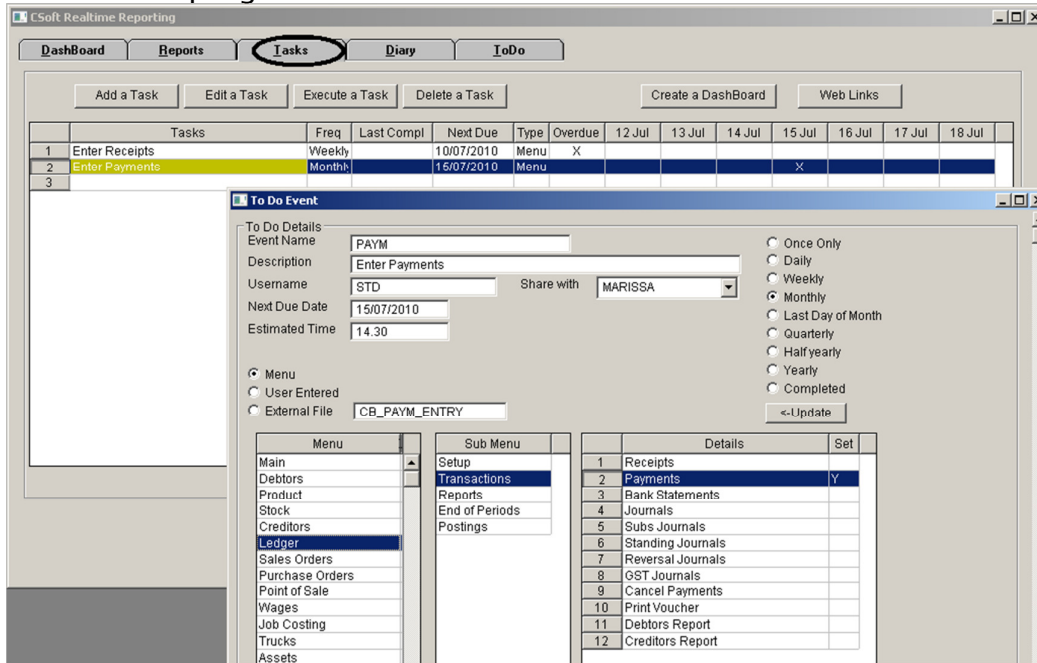


As you can see the report created as at a certain date. To get the report to print every day at today's date we need to change the date. This is done as follows:



To add tasks to the system this can be done as follows:
 Go to the task tab.
 Add a new task or edit an existing task that is highlighted

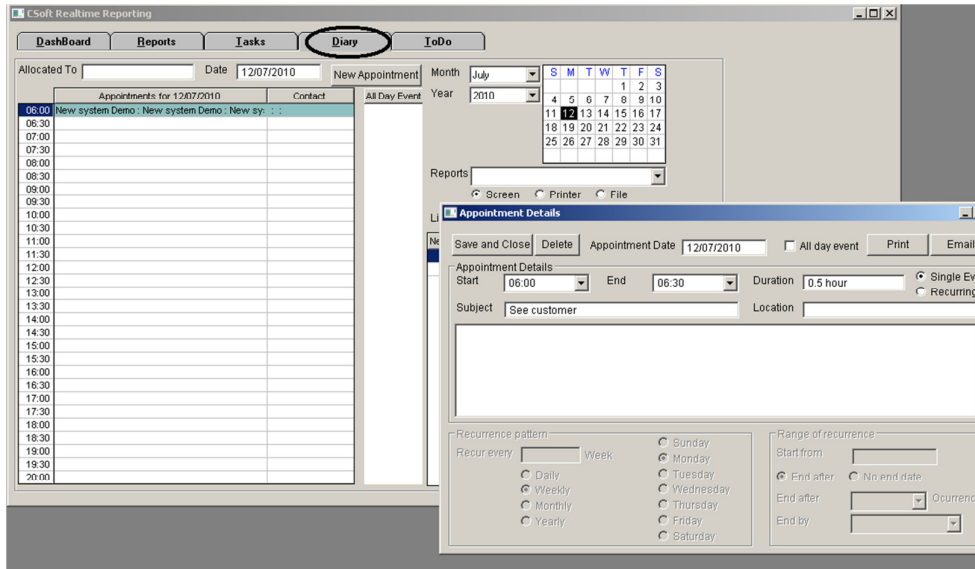
Select how often this need to be executed.
 Select if it is an existing menu item to be opened, a user entered task or
 an external program to be executed.



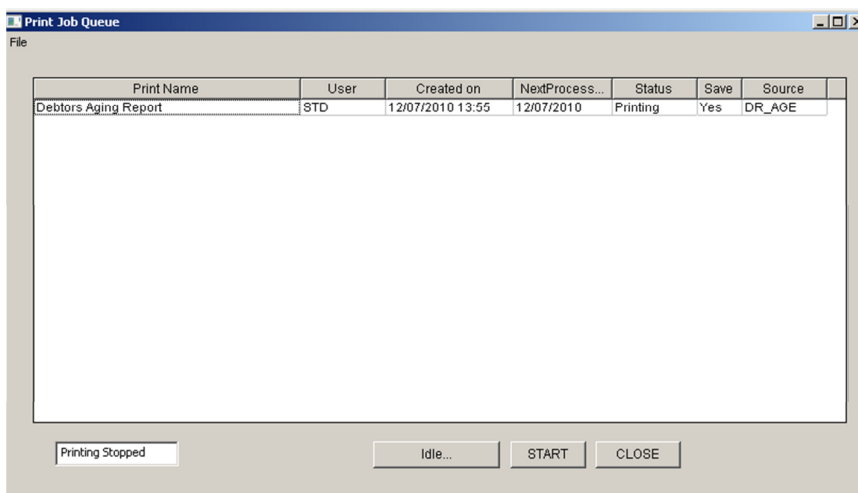
To execute the task come back to this menu, highlight the task, and click on execute. You will also be asked to add a comment before the task is executed.

These will also appear on the last tab ie the TODO tab.

The diary interface is the same as the CRM Diary and linked to the CRM. In version 9.2 onwards we will have an outlook interface build in as well.



Reports saved can also be printed without any user interface. You will however need a free user licence as this requires a user "PRINTJOB" to be created. We will the start the printjob menu with the following parameters: Oinsight.exe /ap=std /un=printjob. No user interface is required as the system will check for new reports every few minutes and execute them. If reports are to be emailed this will need to be setup in such a way that emails can be send without user interaction.



Please call for more information or support on the above..