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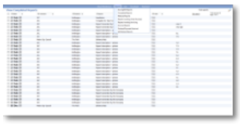
1 Reports Menu

1.1 Reports Menu

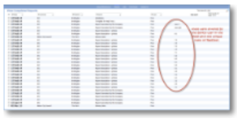


Welcome to the **Reports** menu for magic5.

This is the first screen you will see on opening magic5 and, along with the Jobs Menu, will be important to your everyday work whether your reports are produced for your customers or for internal use only.

Reports are available to all users, although users with a 'customer' status can only view Released reports.

As you can see to the right, it is possible to filter report lists using drop down-lists. By default these are date, customer, location, template name and user, but can be customised in the template - see **Report lists (on-line documentation)** in the Template paramenters help for further details.

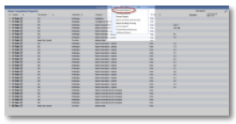


The menu contains the following options.

Incomplete reports

Allows a user to view any reports that they have created but which have not had all mandatory information completed.

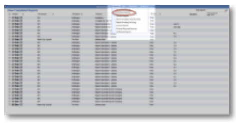
For more information on this menu, visit the ***Incomplete reports (Section 1.3)*** *help.*



Complete reports

Allows an administrator to view any reports that have been completed but which are waiting to be "released" to the customer.

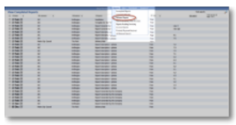
For more information on this menu, visit the ***Complete reports (Section 1.4)*** *help.*



Released reports

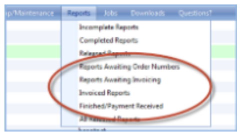
Allows a customer to view any reports that have been released to them. No editing of released reports is possible. An option exists to generate a PDF version of the report.

For more information on this menu, visit the ***Released reports (Section 1.5)*** *help.*



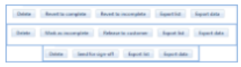
Supplementary statuses

Supplementary statuses are bespoke statuses that are applied to a job or report's lifecycle and give greater detail that the main statuses above. To the right are some examples of these statuses.



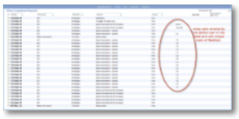
At the bottom of the reports lists are a number of buttons. The

Buttons	*image shows a selection from different report status lists and it is possible that an individual implementation may have more or less than those shown.*
Revert to ... / Mark as ... / Release / Send for sign-off	*These buttons change the status of the reports selected using tick boxes. They are likely to be accessible through the context menu by right-clicking on the report whose status needs to be changed.*
Delete	*Select which reports need to be deleted using the tick box next to it and click this button. A confirmation box will appear after which the report(s) will be permanently deleted.*
Export list	*This option sends the list of reports to an Excel spreadsheet. For further information on bespoke formatting please contact magic5 support.*
Export data	*This option sends data from the selected reports to an Excel spreadsheet. For further information on bespoke formatting please contact magic5 support.*

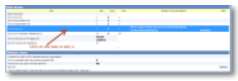


1.2 Viewing and editing reports

Viewing a report in magic5 is simple - just click on the desired item.



It is possible to filter report lists using the drop down-lists positioned at the top of each column. By default these columns contain date, customer, location, template name and user, but can be customised in the template - see **Report lists (on-line documentation)** in the Template paramenters help for further details.

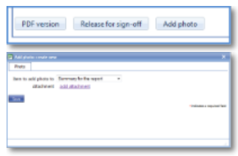


To **Edit** an item in a report click on it to open it for viewing, then click on the required item and a pop-up box will appear. A few examples of amendable items are shown below.

Buttons

At the bottom of the report are some buttons.

- ***PDF version*** *produces a PDF version of the report as it is.*
- ***Release for sign-off*** *changes the report status to 'released'.*
- ***Add photo*** *adds a photo to a specified item in the report (see image to right). Photos are uploaded by clicking the 'Add attachment' link.*



Report header

The top of the report will look something like the image to the right. None of these items can be amended from here, but it is possible to view follow up actions and mark them as complete with a username, a date and any relevant comments.

*For help changing other items in the Report header such as **Job data** and **Status**, see help for the type of report you wish to amend - **Incomplete reports (Section 1.3)**, **Complete reports (Section 1.4)** or **Released reports (Section 1.5)**.*

Risk factors

The Risk factor item type is where a device user identifies the risk of a particular item (eg. unsafe appliance, poor hygiene, unsealed fire door).

*More **help on Risk factors ('Item Type - Risk Factors' in the on-line documentation)** is available.*

Risk factor findings

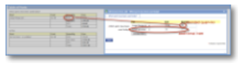
Risk factor findings are attached to Risk factor scores (see above) and elaborate on the situation.

*More **help on Risk factor findings ('Item Type - Findings' in the on-line documentation)** is available.*

Tables - listed items

Tables can contain items from a readymade list or a user can enter free text items.

*More **help on Tables ('Item Type - Table' in the on-line documentation)** or **Invoice table ('Item Type - Invoice table' in the on-line documentation)** is available.*



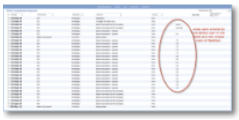
Tables - ad hoc items

Tables can contain items from a readymade list or a user can enter free text items.

*More **help on Tables ('Item Type - Table' in the on-line documentation)** or **Invoice table ('Item Type - Invoice table' in the on-line documentation)** is available.*

1.3 Incomplete reports

The **Incomplete reports list** in magic5 allows a user to view any reports that they have created but which have not had all mandatory information completed.



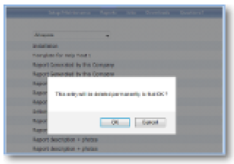
It is possible to filter report lists using the drop down-lists positioned at the top of each column. By default these columns contain date, customer, location, template name and user, but can be customised in the template - see **Report lists (on-line documentation)** in the Template paramenters help for further details.

Click on a report to View and edit full report results. **Find out more about viewing and editing reports. (Section 1.2)**

Right-click on a report to bring up the context menu which will offer the options listed below.

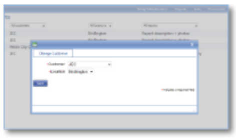
Delete

This option deletes the report. You will be asked to confirm but once you have agreed you will not be able to recover the report.



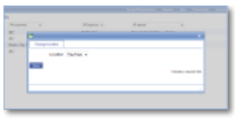
Change customer

Select the required customer and location from the drop-down lists. The location list is dependent on the customer selected. ***Find out more about customer lists ('Add customer' in the on-line documentation)****.*



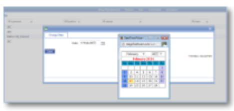
Change location

Select the required location from the drop-down list. The items in the list are dependent on the current customer. ***Find out more about location lists. ('Attachments for a customer' in the on-line documentation)***



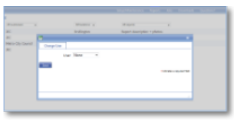
Change date

Click on the calender icon next to the date prompt to bring up the calendar and select the required date.



Change user

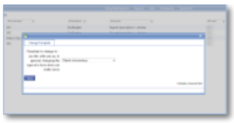
Select the required user from the drop-down list. ***Find out more about user lists. ('Users' in the on-line documentation)***



Select the required template from the drop-down list, bearing

Change template

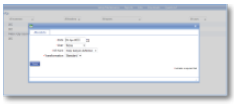
in mind that changing a form template after the form has been completed is a very dangerous undertaking and should only be done in extreme circumstances and in the knowledge that problems may ensue. ***Find out more about templates. ('Template' in the on-line documentation)***



Create job

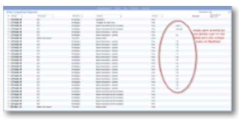
The option allows a follow-up job to be created and allocated to a particular user.

*Date	*Click on the icon to show the calendar to select a date.*
*User	*Select a user from the drop-down list to whom the job is to be allocated.* ***Find out more about user lists. ('Users' in the on-line documentation)***
*Job type	*Select a Job definition from the drop-down list.* ***Find out more about job definitions ('Job definition' in the on-line documentation)****.*
*Transformation	*Select the required transformation from the drop-down list. This is a bespoke item and must have already been created by magic5 support to appear in this list.*

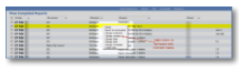


1.4 Complete reports

The **Complete reports list** in magic5 allows an administrator to view any reports that have been completed but which are waiting to be "released" to the customer.



It is possible to filter report lists using the drop down-lists positioned at the top of each column. By default these columns contain date, customer, location, template name and user, but can be customised in the template - see **Report lists (on-line documentation)** in the Template paramenters help for further details.

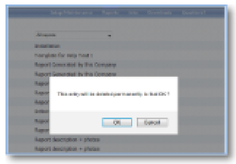


Click on a report to view and edit full report results. Options also exist for generating PDF versions of the report and for releasing the report to the customer. **Find out more about viewing and editing reports. (Section 1.2)**

Right-click on a report to bring up the context menu which will offer the options listed below.

Delete

This option deletes the report. You will be asked to confirm but once you have agreed you will not be able to recover the report.



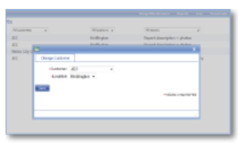
Revert to Incomplete

Moves the report from the "Complete Reports" category to "Incomplete Reports". The report will then require "release for sign-off" before it again appears in "Complete Reports". Note that any actions associated with the report moving to status "Complete" will be performed again when the report is "released for sign-off".

Please note that there is no confirmation prompt so make sure that this is the correct report before taking this action.

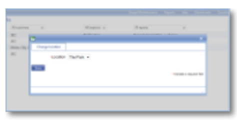
Change customer

Select the required customer and location from the drop-down lists. The location list is dependent on the customer selected. ***Find out more about customer lists ('Add customer' in the on-line documentation).***



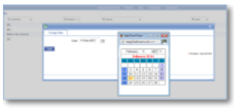
Change location

Select the required location from the drop-down list. The items in the list are dependent on the current customer. ***Find out more about location lists. ('Attachments for a customer' in the on-line documentation)***



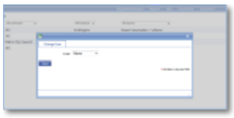
Change date

Click on the calender icon next to the date prompt to bring up the calendar and select the required date.



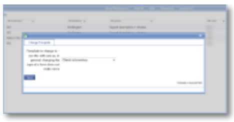
Change user

Select the required user from the drop-down list. ***Find out more about user lists. ('Users' in the on-line documentation)***



Change template

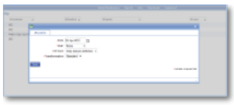
Select the required template from the drop-down list, bearing in mind that changing a form template after the form has been completed is a very dangerous undertaking and should only be done in extreme circumstances and in the knowledge that problems may ensue. ***Find out more about templates. ('Template' in the on-line documentation)***



Create job

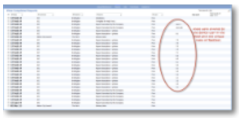
The option allows a follow-up job to be created and allocated to a particular user.

*Date	*Click on the icon to show the calendar to select a date.*
*User	*Select a user from the drop-down list to whom the job is to be allocated.* ***Find out more about user lists. ('Users' in the on-line documentation)***
*Job type	*Select a Job definition from the drop-down list.* ***Find out more about job definitions ('Job definition' in the on-line documentation)****.*
*Transformation	*Select the required transformation from the drop-down list. This is a bespoke item and must have already been created by magic5 support to appear in this list.*

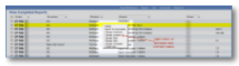


1.5 Released reports

The **Complete reports list** in magic5 allows an administrator to view any reports that have been completed but which are waiting to be "released" to the customer.



It is possible to filter report lists using the drop down-lists positioned at the top of each column. By default these columns contain date, customer, location, template name and user, but can be customised in the template - see **Report lists (on-line documentation)** in the Template paramenters help for further details.

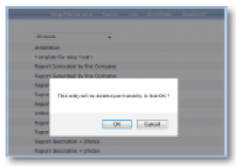


Click on a report to view and edit full report results. Options also exist for generating PDF versions of the report and for releasing the report to the customer. **Find out more about viewing and editing reports. (Section 1.2)**

Right-click on a report to bring up the context menu which will offer the options listed below.

Delete

This option deletes the report. You will be asked to confirm but once you have agreed you will not be able to recover the report.



Revert to Incomplete

Moves the report from the "Released Reports" category to "Incomplete Reports". The report will then require "releasing for sign-off" and "release to customer" before it again appears in "Released Reports". Note that any actions associated with the report moving to status "Complete" or "Released" will be performed again when the report is again "released for sign-off" and "released to customer".

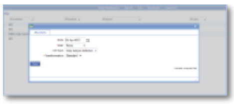
Please note that there is no confirmation prompt so make sure that this is the correct report before taking this action.

Revert to Complete

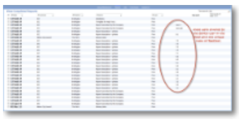
Moves the report from the "Released Reports" category to "Complete Reports". The report will then require "release to customer" before it again appears in "Released Reports". Note that any actions associated with the report moving to status "Released" will be performed again when the report is "released to customer".

Please note that there is no confirmation prompt so make sure that this is the correct report before taking this action.

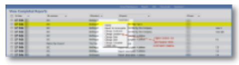
Create job	*The option allows a follow-up job to be created and allocated to a particular user.*
*Date	*Click on the icon to show the calendar to select a date.*
*User	*Select a user from the drop-down list to whom the job is to be allocated.* ***Find out more about user lists. ('Users' in the on-line documentation)***
*Job type	*Select a Job definition from the drop-down list.* ***Find out more about job definitions ('Job definition' in the on-line documentation)****.*
*Transformation	*Select the required transformation from the drop-down list. This is a bespoke item and must have already been created by magic5 support to appear in this list.*

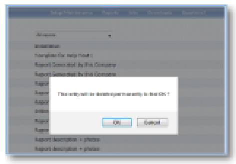


1.6 Reports awaiting order numbers



The **Reports awaiting order numbers list** in magic5 allows ********************* The prompts below have been left in in case they are useful. ***************************************





Delete

This option deletes the report. You will be asked to confirm but once you have agreed you will not be able to recover the report.

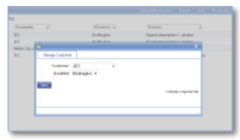
Revert to Incomplete

Moves the report from the "Complete Reports" category to "Incomplete Reports". The report will then require "release for sign-off" before it again appears in "Complete Reports". Note that any actions associated with the report moving to status "Complete" will be performed again when the report is "released for sign-off".

Please note that there is no confirmation prompt so make sure that this is the correct report before taking this action.

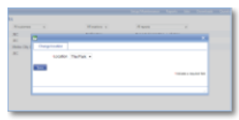
Change customer

Select the required customer and location from the drop-down lists. The location list is dependent on the customer selected. ***Find out more about customer lists ('Add customer' in the on-line documentation)****.*



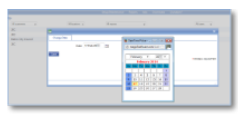
Change location

Select the required location from the drop-down list. The items in the list are dependent on the current customer. ***Find out more about location lists. ('Attachments for a customer' in the on-line documentation)***



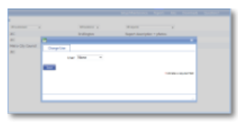
Change date

Click on the calender icon next to the date prompt to bring up the calendar and select the required date.



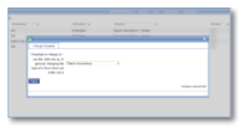
Change user

Select the required user from the drop-down list. ***Find out more about user lists. ('Users' in the on-line documentation)***

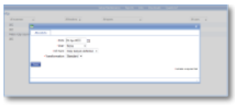


Change template

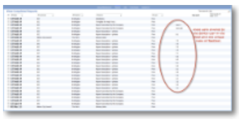
Select the required template from the drop-down list, bearing in mind that changing a form template after the form has been completed is a very dangerous undertaking and should only be done in extreme circumstances and in the knowledge that problems may ensue. ***Find out more about templates. ('Template' in the on-line documentation)***



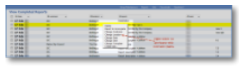
magic5software
Data management for a mobile workforce

Create job	*The option allows a follow-up job to be created and allocated to a particular user.*	
*Date	*Click on the icon to show the calendar to select a date.*	
*User	*Select a user from the drop-down list to whom the job is to be allocated.* ***Find out more about user lists. ('Users' in the on-line documentation)***	
*Job type	*Select a Job definition from the drop-down list.* ***Find out more about job definitions ('Job definition' in the on-line documentation)****.*	
*Transformation	**	

1.7 Reports awaiting invoicing

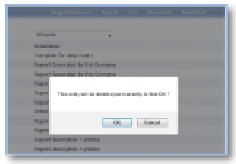


The **Reports awaiting invoicing list** in magic5 allows ********************** The prompts below have been left in in case they are useful. ***



Delete

This option deletes the report. You will be asked to confirm but once you have agreed you will not be able to recover the report.



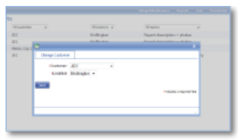
Revert to Incomplete

Moves the report from the "Complete Reports" category to "Incomplete Reports". The report will then require "release for sign-off" before it again appears in "Complete Reports". Note that any actions associated with the report moving to status "Complete" will be performed again when the report is "released for sign-off".

Please note that there is no confirmation prompt so make sure that this is the correct report before taking this action.

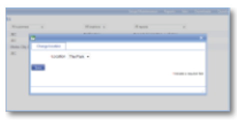
Change customer

Select the required customer and location from the drop-down lists. The location list is dependent on the customer selected. ***Find out more about customer lists ('Add customer' in the on-line documentation)****.*



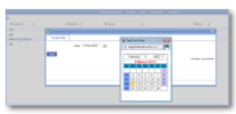
Change location

Select the required location from the drop-down list. The items in the list are dependent on the current customer. ***Find out more about location lists. ('Attachments for a customer' in the on-line documentation)***



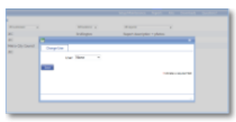
Change date

Click on the calender icon next to the date prompt to bring up the calendar and select the required date.



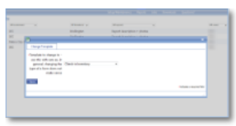
Change user

Select the required user from the drop-down list. ***Find out more about user lists. ('Users' in the on-line documentation)***



Change template

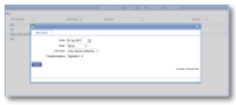
Select the required template from the drop-down list, bearing in mind that changing a form template after the form has been completed is a very dangerous undertaking and should only be done in extreme circumstances and in the knowledge that problems may ensue. ***Find out more about templates. ('Template' in the on-line documentation)***



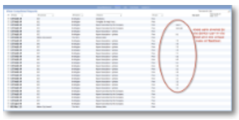
Create job

The option allows a follow-up job to be created and allocated to a particular user.

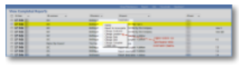
*Date	*Click on the icon to show the calendar to select a date.*
*User	*Select a user from the drop-down list to whom the job is to be allocated.* ***Find out more about user lists. ('Users' in the on-line documentation)***
*Job type	*Select a Job definition from the drop-down list.* ***Find out more about job definitions ('Job definition' in the on-line documentation)****.*
*Transformation	**



1.8 Invoiced Reports

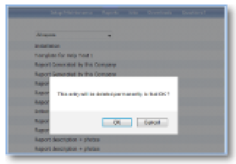


The **Invoiced Reports list** in magic5 allows ********************* The prompts below have been left in in case they are useful. ***************************************



Delete

This option deletes the report. You will be asked to confirm but once you have agreed you will not be able to recover the report.



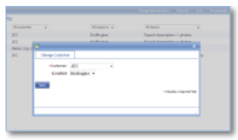
Revert to Incomplete

Moves the report from the "Complete Reports" category to "Incomplete Reports". The report will then require "release for sign-off" before it again appears in "Complete Reports". Note that any actions associated with the report moving to status "Complete" will be performed again when the report is "released for sign-off".

Please note that there is no confirmation prompt so make sure that this is the correct report before taking this action.

Change customer

Select the required customer and location from the drop-down lists. The location list is dependent on the customer selected. ***Find out more about customer lists ('Add customer' in the on-line documentation)****.*

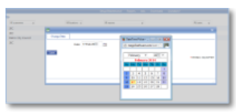


Change location

Select the required location from the drop-down list. The items in the list are dependent on the current customer. ***Find out more about location lists. ('Attachments for a customer' in the on-line documentation)***

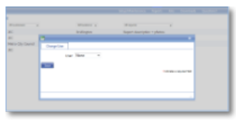
Change date

Click on the calender icon next to the date prompt to bring up the calendar and select the required date.



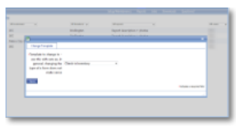
Change user

Select the required user from the drop-down list. ***Find out more about user lists. ('Users' in the on-line documentation)***



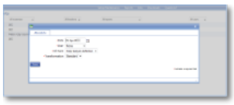
Change template

Select the required template from the drop-down list, bearing in mind that changing a form template after the form has been completed is a very dangerous undertaking and should only be done in extreme circumstances and in the knowledge that problems may ensue. ***Find out more about templates. ('Template' in the on-line documentation)***



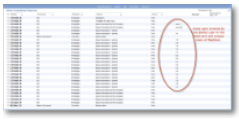
Create job

The option allows a follow-up job to be created and allocated to a particular user.

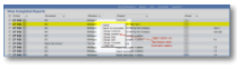


*Date	*Click on the icon to show the calendar to select a date.*
*User	*Select a user from the drop-down list to whom the job is to be allocated.* ***Find out more about user lists. ('Users' in the on-line documentation)***
*Job type	*Select a Job definition from the drop-down list.* ***Find out more about job definitions ('Job definition' in the on-line documentation)****.*
*Transformation	***

1.9 Finished/Payment Received

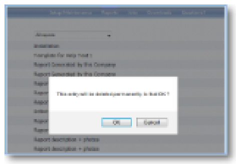


The **Finished/Payment Received list** in magic5 allows ********************* The prompts below have been left in in case they are useful. ***************************************



Delete

This option deletes the report. You will be asked to confirm but once you have agreed you will not be able to recover the report.



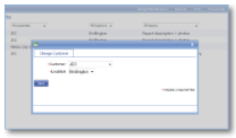
Revert to Incomplete

Moves the report from the "Complete Reports" category to "Incomplete Reports". The report will then require "release for sign-off" before it again appears in "Complete Reports". Note that any actions associated with the report moving to status "Complete" will be performed again when the report is "released for sign-off".

Please note that there is no confirmation prompt so make sure that this is the correct report before taking this action.

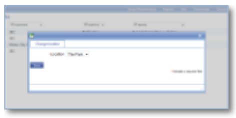
Change customer

Select the required customer and location from the drop-down lists. The location list is dependent on the customer selected. ***Find out more about customer lists ('Add customer' in the on-line documentation)****.*



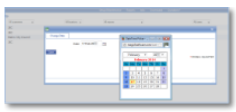
Change location

Select the required location from the drop-down list. The items in the list are dependent on the current customer. ***Find out more about location lists. ('Attachments for a customer' in the on-line documentation)***



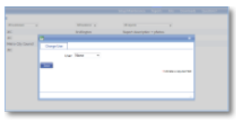
Change date

Click on the calender icon next to the date prompt to bring up the calendar and select the required date.



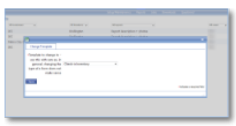
Change user

Select the required user from the drop-down list. ***Find out more about user lists. ('Users' in the on-line documentation)***



Change template

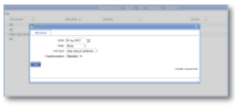
Select the required template from the drop-down list, bearing in mind that changing a form template after the form has been completed is a very dangerous undertaking and should only be done in extreme circumstances and in the knowledge that problems may ensue. ***Find out more about templates. ('Template' in the on-line documentation)***



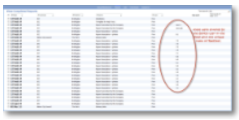
Create job

The option allows a follow-up job to be created and allocated to a particular user.

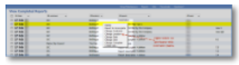
*Date	*Click on the icon to show the calendar to select a date.*
*User	*Select a user from the drop-down list to whom the job is to be allocated.* ***Find out more about user lists. ('Users' in the on-line documentation)***
*Job type	*Select a Job definition from the drop-down list.* ***Find out more about job definitions ('Job definition' in the on-line documentation)****.*
*Transformation	**



1.10 All released reports

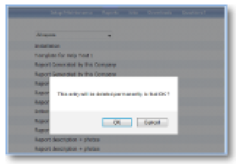


The **All released reports list** in magic5 allows ********************** The prompts below have been left in in case they are useful. **



Delete

This option deletes the report. You will be asked to confirm but once you have agreed you will not be able to recover the report.



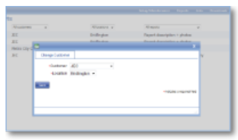
Revert to Incomplete

Moves the report from the "Complete Reports" category to "Incomplete Reports". The report will then require "release for sign-off" before it again appears in "Complete Reports". Note that any actions associated with the report moving to status "Complete" will be performed again when the report is "released for sign-off".

Please note that there is no confirmation prompt so make sure that this is the correct report before taking this action.

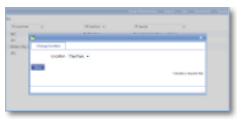
Change customer

Select the required customer and location from the drop-down lists. The location list is dependent on the customer selected. ***Find out more about customer lists ('Add customer' in the on-line documentation)****.*



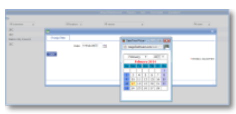
Change location

Select the required location from the drop-down list. The items in the list are dependent on the current customer. ***Find out more about location lists. ('Attachments for a customer' in the on-line documentation)***



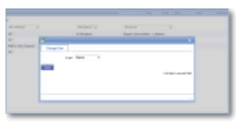
Change date

Click on the calender icon next to the date prompt to bring up the calendar and select the required date.



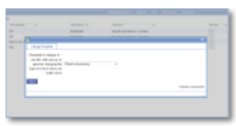
Change user

Select the required user from the drop-down list. ***Find out more about user lists. ('Users' in the on-line documentation)***



Change template

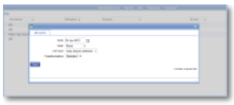
Select the required template from the drop-down list, bearing in mind that changing a form template after the form has been completed is a very dangerous undertaking and should only be done in extreme circumstances and in the knowledge that problems may ensue. ***Find out more about templates. ('Template' in the on-line documentation)***



Create job

The option allows a follow-up job to be created and allocated to a particular user.

*Date	*Click on the icon to show the calendar to select a date.*
*User	*Select a user from the drop-down list to whom the job is to be allocated.* ***Find out more about user lists. ('Users' in the on-line documentation)***
*Job type	*Select a Job definition from the drop-down list.* ***Find out more about job definitions ('Job definition' in the on-line documentation)****.*
*Transformation	**



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