OutSmart

Feature user guide
Reporting 2.0

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User Guide Reporting module 2.0

Licensing

- Accelerate: All features available except Snapshots functionality
- Maximize: no limitations

How do I activate a beta module?

1. Go to the Modules page (bottom-left in the menu).
2. Open the Beta Modules tab. Here, you'll find various beta modules.
3. Enable the module you want to use. You'll be asked to agree to the terms and conditions of the beta program. Be sure to read them carefully and accept them if applicable.
4. After accepting, you'll see a confirmation message.

Licensing

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1. Introduction

Overview

The new reporting module is designed for users with an Accelerate subscription and above. This module offers a powerful way to transform data into valuable insights, allowing you to better analyse and improve business performance.

Benefits

The reporting module provides pre-built reports that deliver immediate insights into commonly used data. With options to duplicate and customise reports, each report can be tailored to specific business needs.

Activate the Module

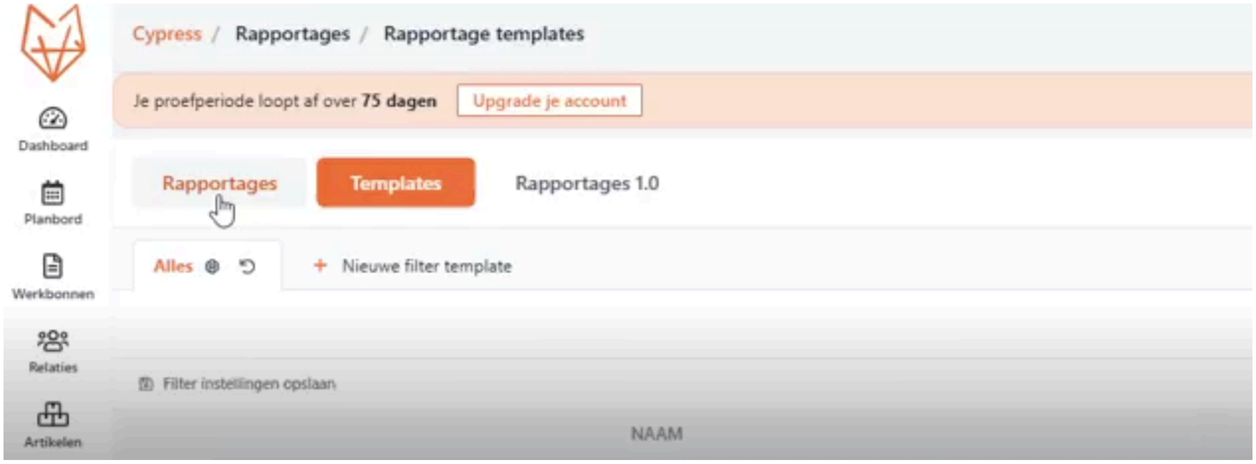
This step can be skipped if the module is already active.

Start by navigating to the Modules page (left bottom). On this page, you will see a tab called BETA Modules. Here you will find Reports 2.0. Enable the BETA module, and you will be prompted to accept the terms and conditions. Read the terms, and if applicable, agree to the terms and conditions of the beta module program. After accepting the terms, you will see a confirmation popup.

2. Navigation and Basic Features

Accessing the Reporting Module

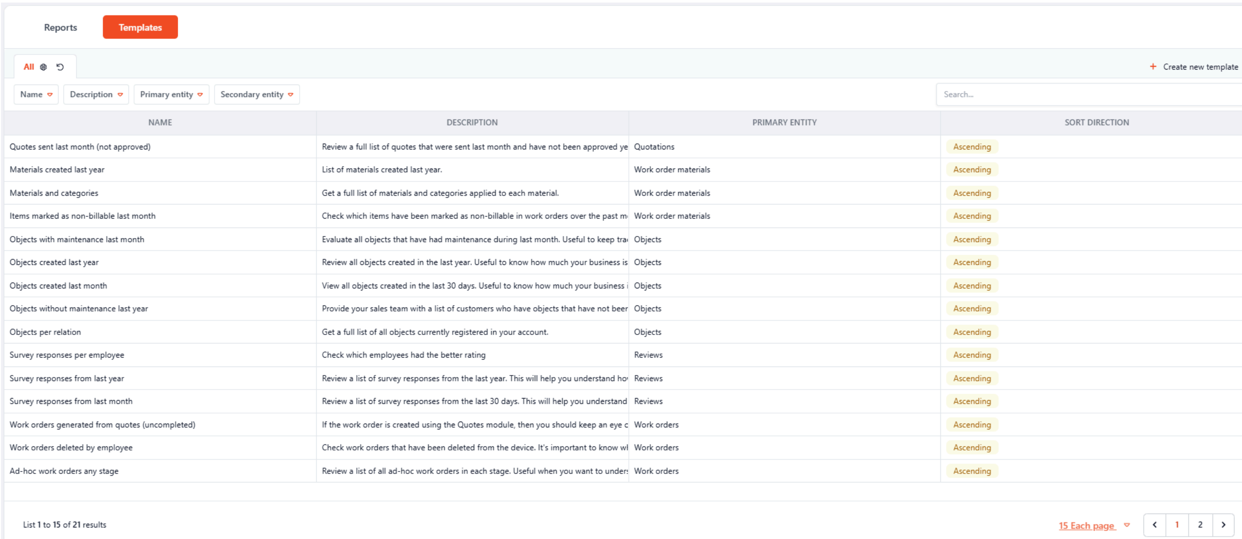
To access the reporting module, log in to your dashboard and select the “Reports” option in the sidebar-menu. This will open an overview of the standard reports and any custom reports you’ve created.



Have you created any reports in the old version, Reports 1.0?
You can find them under the **Reports 1.0** tab. Clicking on this tab will display all your old reports, which you can still run if needed.

Templates
Go to the Templates tab. Upon opening the reporting module, several standard reports are displayed. These reports are called templates and are immediately usable, providing frequently requested insights.

- **Using Templates:** Select the desired report. This will open the create-panel and automatically fill all fields with the correct data. The report can then immediately be created.
- **Customization:** Templates can be easily customised. After selecting one, every field can be edited to suit specific needs.



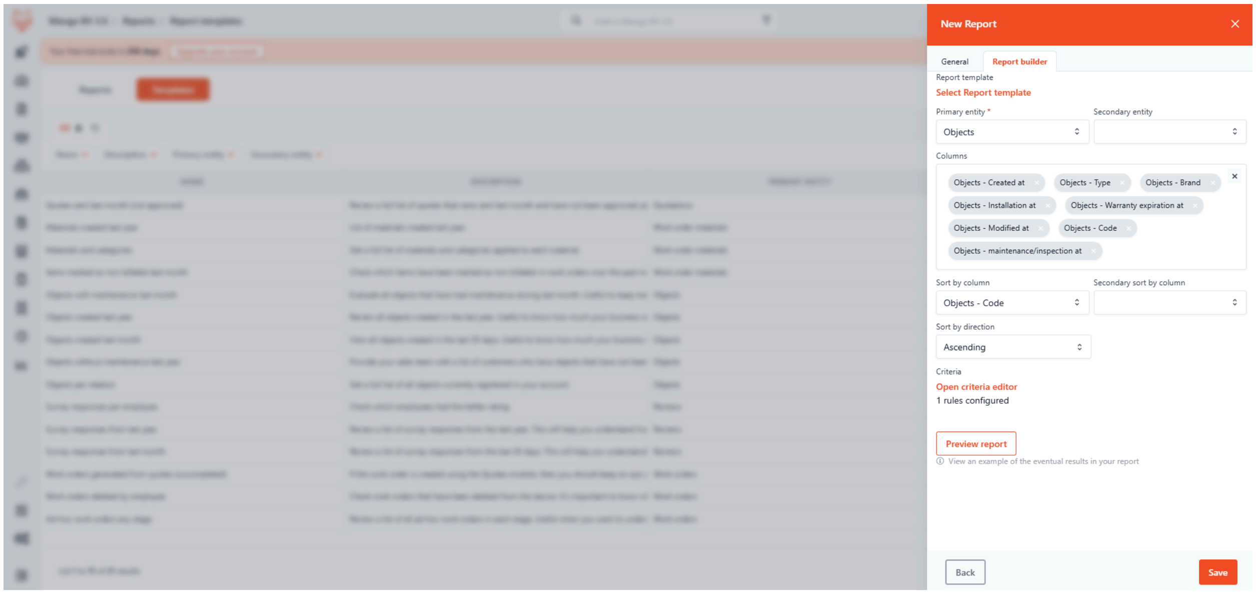
NAME	DESCRIPTION	PRIMARY ENTITY	SORT DIRECTION
Quotes sent last month (not approved)	Review a full list of quotes that were sent last month and have not been approved ye	Quotations	Ascending
Materials created last year	List of materials created last year.	Work order materials	Ascending
Materials and categories	Get a full list of materials and categories applied to each material.	Work order materials	Ascending
Items marked as non-billable last month	Check which items have been marked as non-billable in work orders over the past m	Work order materials	Ascending
Objects with maintenance last month	Evaluate all objects that have had maintenance during last month. Useful to keep tra	Objects	Ascending
Objects created last year	Review all objects created in the last year. Useful to know how much your business is	Objects	Ascending
Objects created last month	View all objects created in the last 30 days. Useful to know how much your business i	Objects	Ascending
Objects without maintenance last year	Provide your sales team with a list of customers who have objects that have not beer	Objects	Ascending
Objects per relation	Get a full list of all objects currently registered in your account.	Objects	Ascending
Survey responses per employee	Check which employees had the better rating	Reviews	Ascending
Survey responses from last year	Review a list of survey responses from the last year. This will help you understand ho	Reviews	Ascending
Survey responses from last month	Review a list of survey responses from the last 30 days. This will help you understand	Reviews	Ascending
Work orders generated from quotes (uncompleted)	If the work order is created using the Quotes module, then you should keep an eye c	Work orders	Ascending
Work orders deleted by employee	Check work orders that have been deleted from the device. It's important to know wl	Work orders	Ascending
Ad-hoc work orders any stage	Review a list of all ad-hoc work orders in each stage. Useful when you want to unders	Work orders	Ascending

3. Building a report

Entities: The *primary entity* is selected to decide what kind of data the report will contain. Most entities have relations which can also be reported on. Instead of having to create two separate reports, a *secondary entity* can be selected. Doing so creates a combination of two sets of data.

Columns: It is possible that a company values certain columns more than others. In this case, specific entity-columns can be selected for a report. This ensures that a report only contains the data that actually needs to be shown (and can prevent files from getting bloated). Additionally, the columns-field can be left empty to include *all* columns in the report.

Sort by columns: If the data has to be reported in a specific order, a column can be selected to perform a sort on. For example: By selecting the "created at" field, the data will be sorted on the date of creation starting from newest to oldest. This works for secondary entities as well.

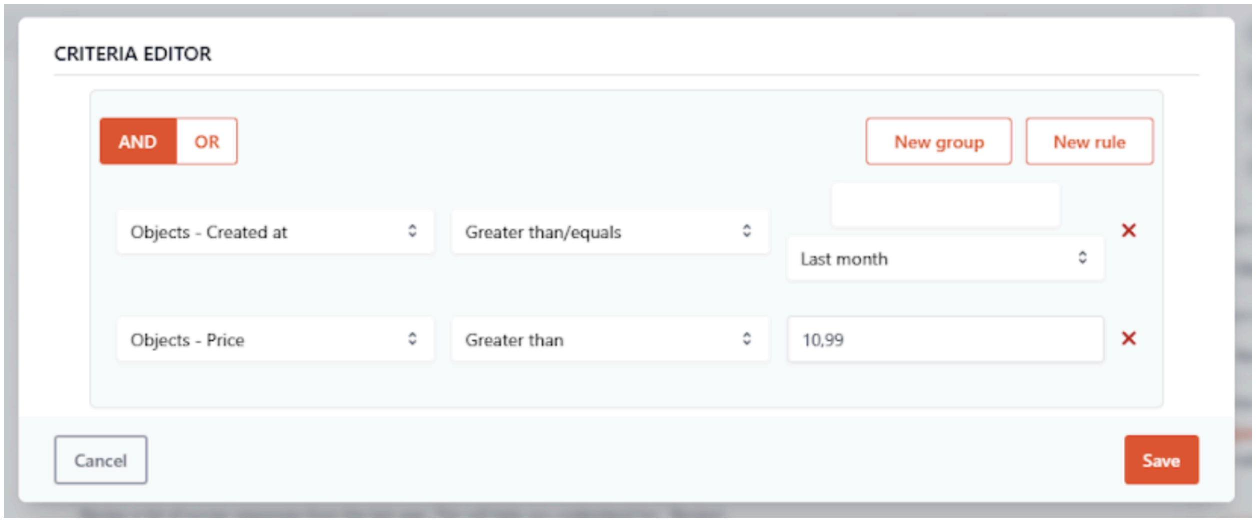


Criteria: The *criteria editor* gives total control over the eventual results in a report. It can be used to provide all sorts of constraints and desires.

- **Rules:** Determine which values are allowed/forbidden in a report.
- **Groups:** A collection of rules. New groups can be created to give even greater control over the eventual result
- **AND/OR operators:** Determine whether a collection of rules/conditions must *all* be met, or just *one of them*.

Criteria: writing rules

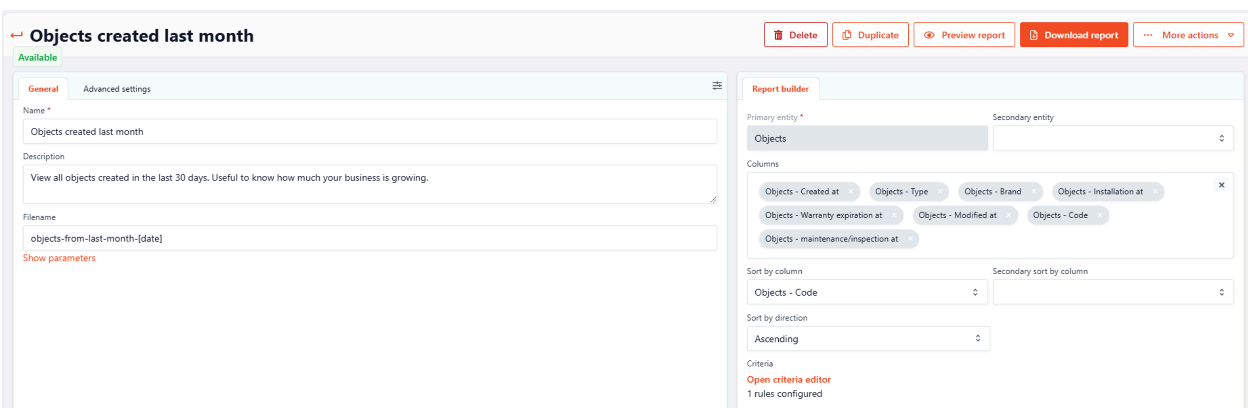
1. To start configuring a rule, click the "new rule" button. A column must be selected in the first input in order to continue. (e.g. "created at").
2. The second input will now become available with *operators*. These give a high level of control because they determine how the desired value must be processed during the exporting process (e.g. the column-value must be *greater than/equal to* the desired value).
3. The third input is where the desired value can be declared. The eventual results of your report will be determined by the column's correlation to this value.



Preview: An example of the eventual results. This helps with gaining insight into how your customizations affect your report and its data.

4. Working with Existing Reports

Opening an existing report will lead to the detail-page. This page contains all information and values that have been configured. All previously configured fields can be edited and saved.

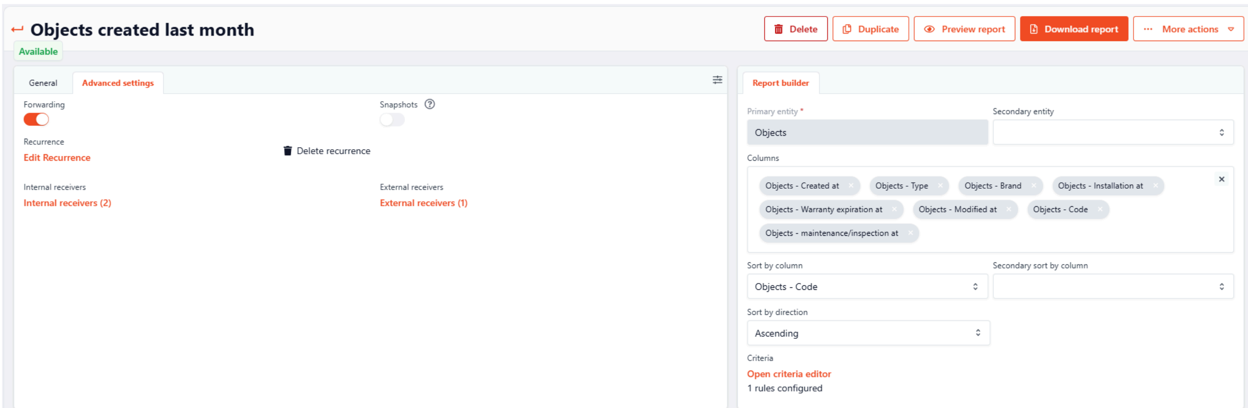


Advanced settings

In addition to the “general” and “report builder” tabs, a new tab called “advanced settings” is available in this detail page.

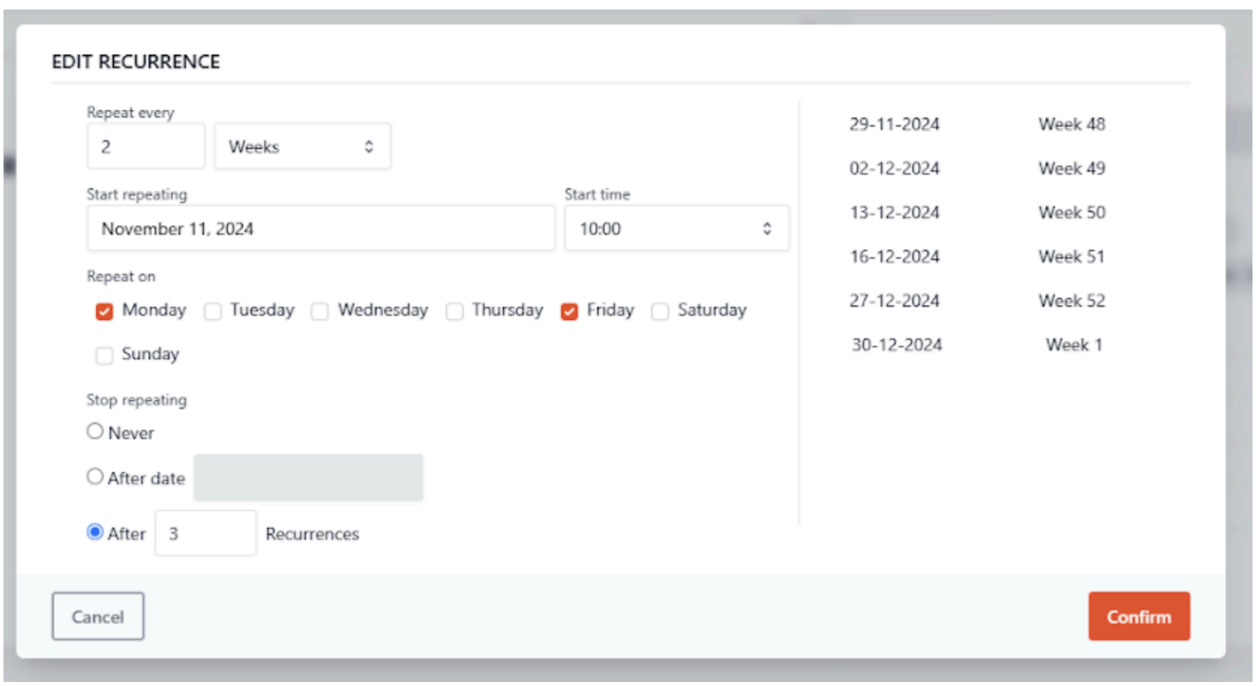
- **Forwarding:** Enabling this setting allows for sending exporting reports to *receivers*. This can be done within the Reporting module through emails.
- **Snapshots:** Enabling this setting makes it possible to save the (current) results of an exported report. These results can be saved within the Reporting module and can be exported again at a later time.
- **Recurrence:** Generating snapshots and forwarding reports to *receivers* can be completely automated. This feature allows for total control over when automated forwarding should take place and for what period of time.

- **Receivers:** The recipients of forwarded reports. There are two types of receivers:
    - **Internal:** These are the employees within your organization.
    - **External:** Recipients who are not defined within your organization account (e.g. a sister company or supplier).



Editing a recurrence

Configuring a recurrence will remove the need to manually generate a report, as well as forwarding it to receivers. This functionality will automatically generate a snapshot, and forward the exported file, at the desired dates & time.

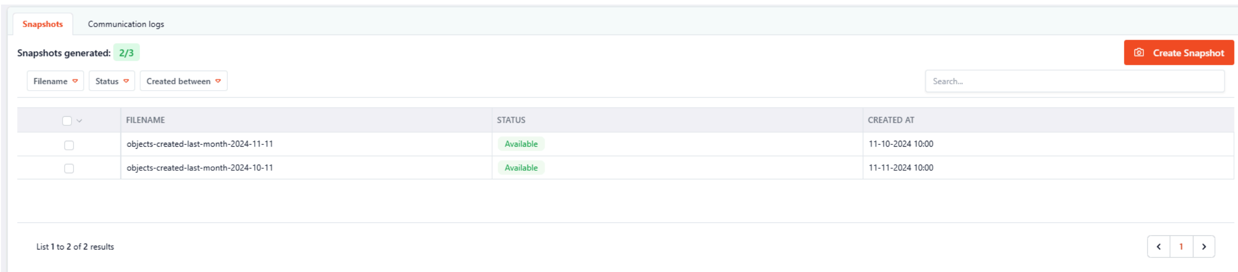


Snapshots overview

! Only available in the Maximize plan

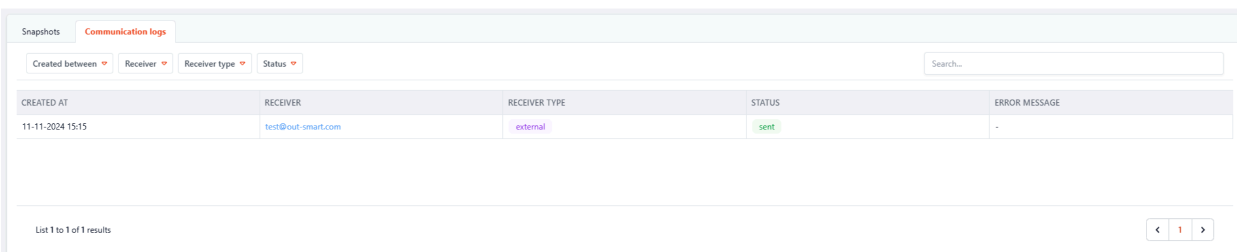
The "Snapshots" tab contains a table of every snapshot that has been generated for this report. There can be a maximum of *three* snapshots per report. This table allows snapshots to be downloaded or deleted.

- **Create snapshot:** Save the (current) results of an exported report in a snapshot. After this action is executed, the table will refresh and your snapshot will be present.
  Disclaimer: If the maximum number of snapshots has already been reached, the oldest will be deleted if a new entry is created (the system will ask for confirmation before executing).



Communication logs overview

The ""communication logs" tab contains a table with all receivers that a report was forwarded to. The table contains email addresses, a status that indicates whether the mail was successfully sent or not, and the types of receivers.



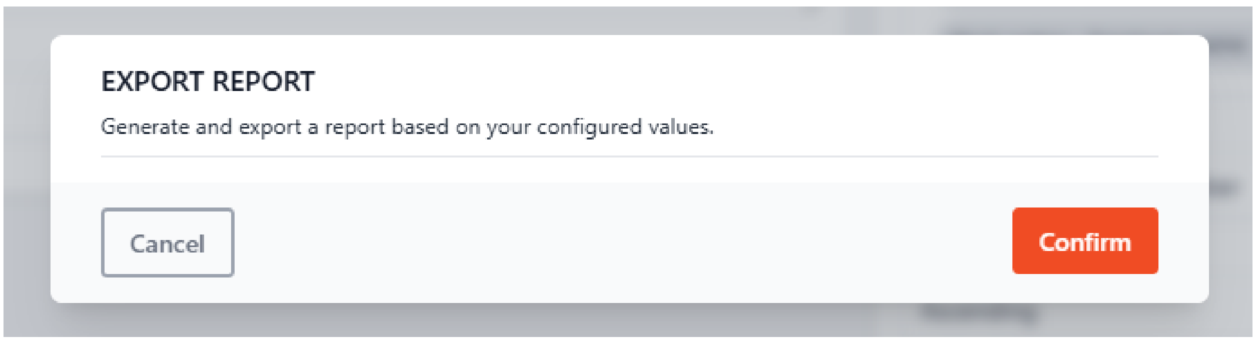
Actions

There are a variety of actions that can be executed.

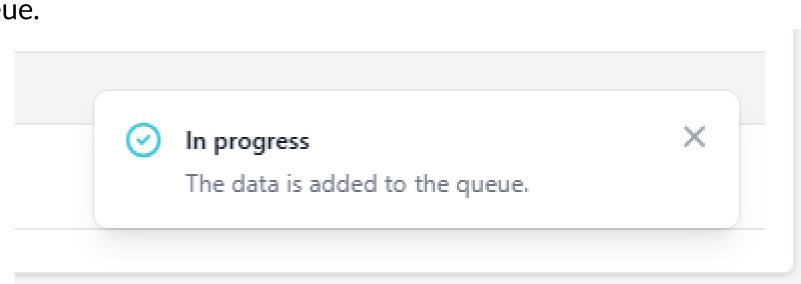
- **Delete:** The configured report will be deleted. This cannot be undone!
- **Duplicate:** A new report will be created with copied data from the original report.
- **Preview report:** Generates an example of the eventual results of the exported report file.
- **Export report:** This action creates a downloadable .XLSX file containing data. The data is based on the selected entities, columns and criteria. **See 6. Queue Notifications**
- **Generate snapshot:** Manually generate a snapshot of the (current) results.
- **Forward to receivers:** Manually send an email containing the exported report file to all recipients.

5. Queue Notifications

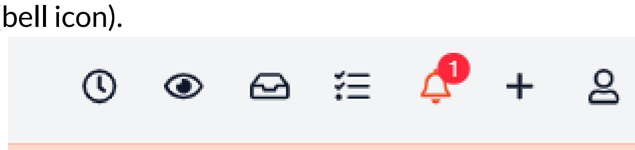
In order to download a report, it must first be exported to a downloadable file. This is done through a *queue*. This process is started by executing the following action:



After the action is successfully confirmed, a toast-message will appear which states that the data is added to the queue.



This means that the selected report is now actively being exported to a downloadable .xlsx file in the background. This process can take some time, because it has to handle every item that will be present in the eventual results. After some time has passed, a queue notification will appear at the top-right of the screen (bell icon).



Clicking this icon leads to the queue notification list view. This is a collection of all new and old notifications. The notification can contain a download, in this case the exported report. The download-button can be clicked to receive the file.

If exporting fails for whatever reason, a notification will appear and states that the action has failed.