Reports Overview

Lading

	Version	Created Date
Reports Overview	V1.2	Oct. 16, 2019

1 Introduction and Disclaimer

This process is a suggestion and may not match all/any suggestions found in WiseTech videos or provided by the WiseTech help desk. This guide is meant to enhance and condense the WiseTech Global documentation - it is not intended to be comprehensive. Refer to the individual documentation and videos on the WiseTech page for complete information from WiseTech.

Additional information is available in Lading Workshops, or in private sessions with your company – contact the Lading training department at info@ladingcorporation.com/ to schedule your session.

2 Overview

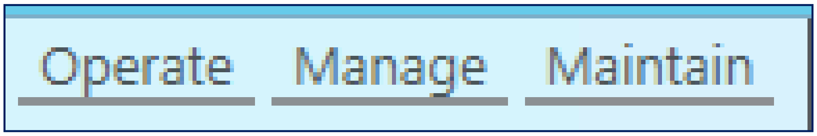
C1 has many ways to extract data. One of the most effective ways to extract statistical data is in the form of Reports. This document describes the reporting functionality, including how to automate the scheduling and delivery.

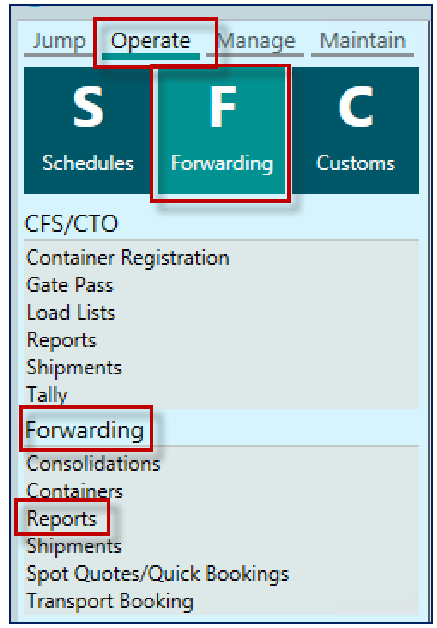
This guide will assist with the following:

- Running a report
- Scheduling delivery of a report
- Managing scheduled reports
- Naming a report, template, and/or schedule

Access to reports is security based, not all users will have access to all reports.

Reports can be run from any of the 3 modules: ‘Operations’, ‘Manage’ and ‘Maintain’, access to reports for a particular module will depend on the individual user’s access rights. Some reports are available in more than one module.



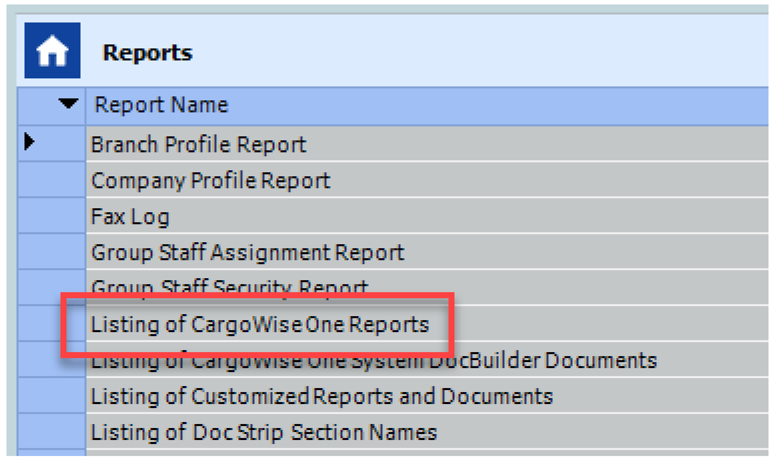


In almost all cases, when a section is opened (in the illustrated case to the right, *Operate>Forwarding>Forwarding*) “Reports” will be listed where it falls alphabetically in the list of items.

2.1 Viewing a list of all Reports

A list of all reports available can be found by going to **Maintain>System>Reports**

When the Listing of CargoWise One Reports is selected, a list of all reports available, along with a brief description of some reports. This list will also show the current version you are on.



Listing of CargoWise One Reports

License Code **ZLC - JEC - TST**
Release **GP Release CW1 2018 Jun 29 patch 573 18.6.29.573**
Exe Date **20-Sep-2018 11:13:41 PM**
Printed by Ken.Kozlowski 25-Sep-18 11:32

Report Name	Description	Sys	Client	Filter
ComplianceReport				
Compliance Tax Report		Y	N	
Day Book Report		Y	N	
VAT Register Report		Y	N	CTY=IT
DocReportCustomiser				
Report Reference Guide		Y	N	
RepAccountReports				
Charge Code Listing		Y	N	
Charge Code Profile	The Charge Code Profile Report will generate a detailed profile of all Charge Code set ups for the current login company.	Y	N	
Chart Of Accounts	The Chart of Accounts Report shows a detailed profile of the General Ledger Account codes set up in your CargoWise One system.	Y	N	

3 Running a Report

3.1 Reports List

Available reports are visible upon clicking on the ‘Reports’ function in any module where reports are available.

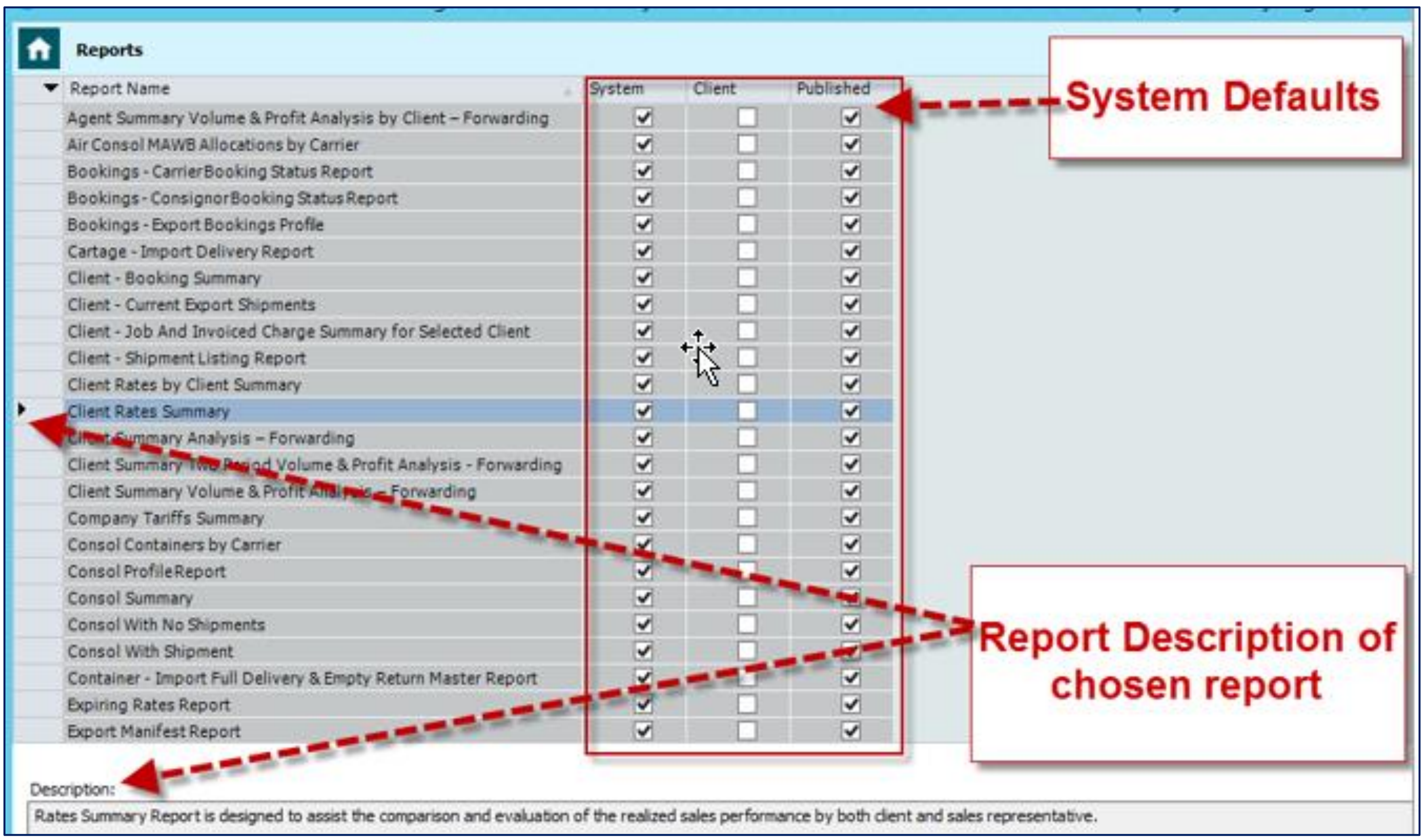
A description of each report will become visible once you click on the individual report name.

The “System” Checkbox signifies a report created within the WiseTech System.

The “Client” Checkbox would signify a custom report created for a particular client

All reports should be checked as “Published”, as only published reports may be seen by the end user.

All of these choices can be hidden and/or rearranged by Right clicking anywhere in the grid and clicking “Customize Columns”. More detail on Customizing Columns is available in the General Functions Manual. If a report is published, it will show with a checked box.

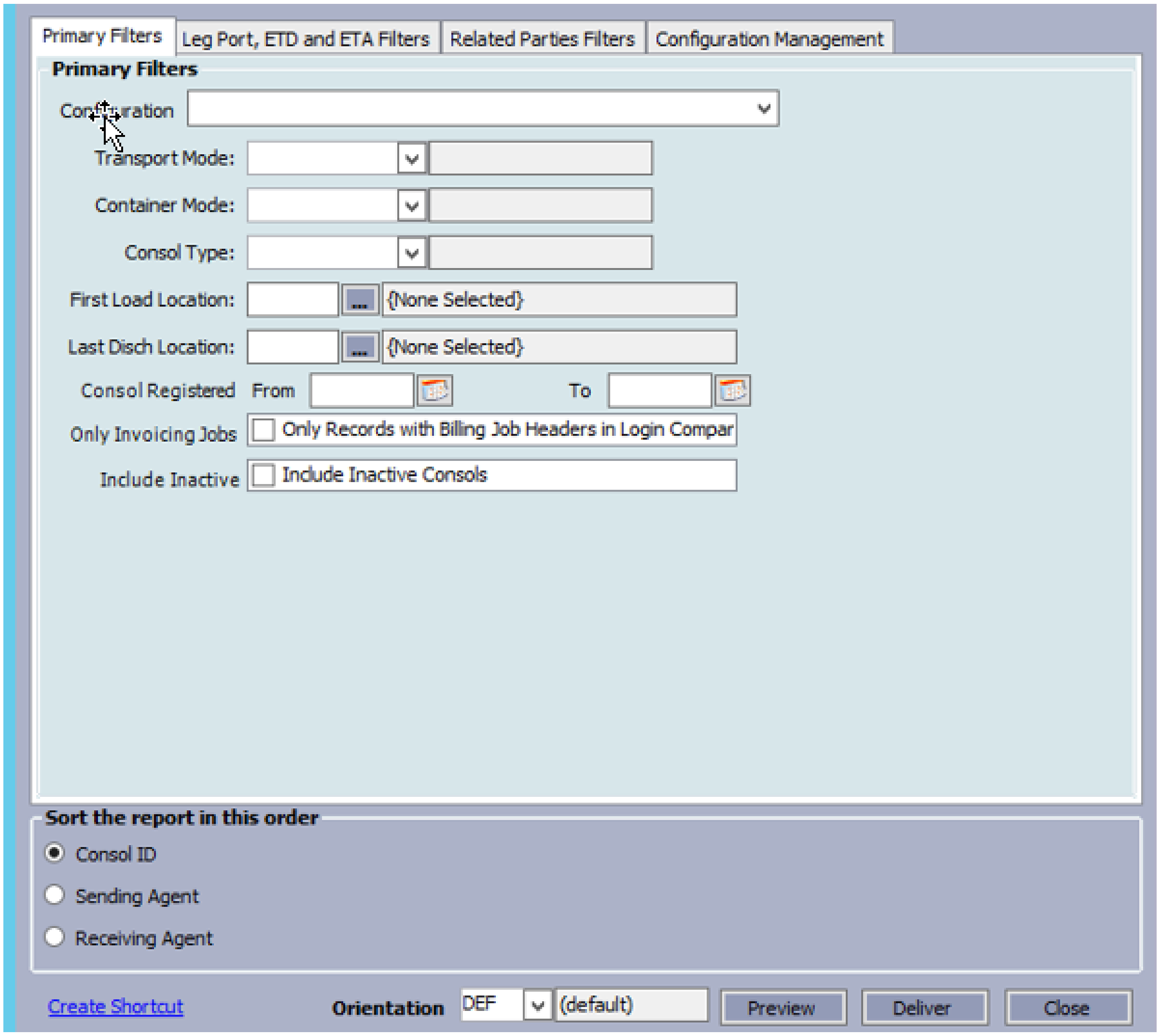


3.2 Report Filters

Double clicking on any report will open a new window with various filter options.

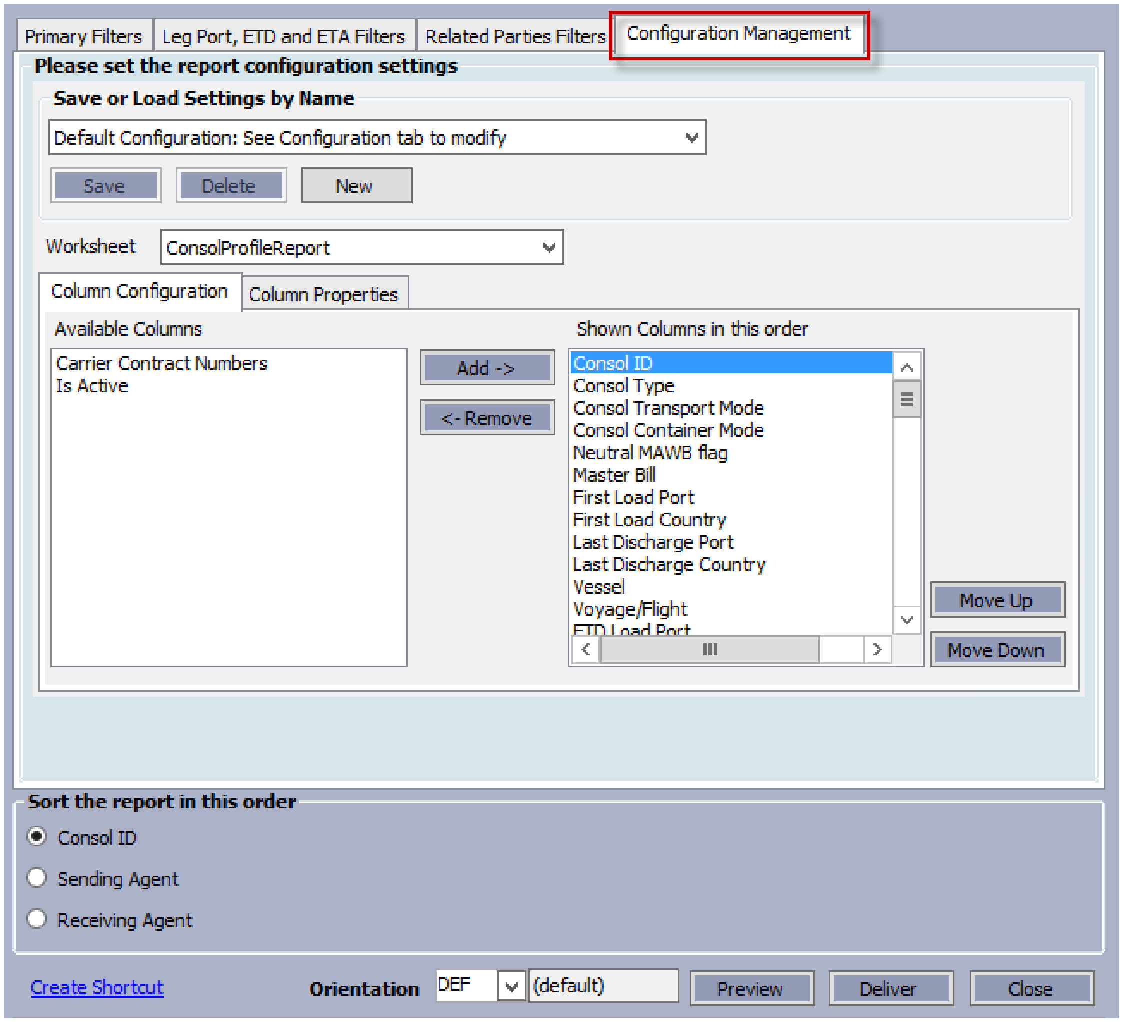
The first tab will almost always reflect the "primary" filter options. Any required fields will appear in red.

Additional tabs may be available to add additional filters. (In this example, "Leg Port, ETS and ETA Filters" and "Related Parties Filters"). Any required fields will appear in red.



Configuration Management

On many (but not all) reports the "Configuration Management" tab allows you to customize the output data columns to be included on the report in two different ways:

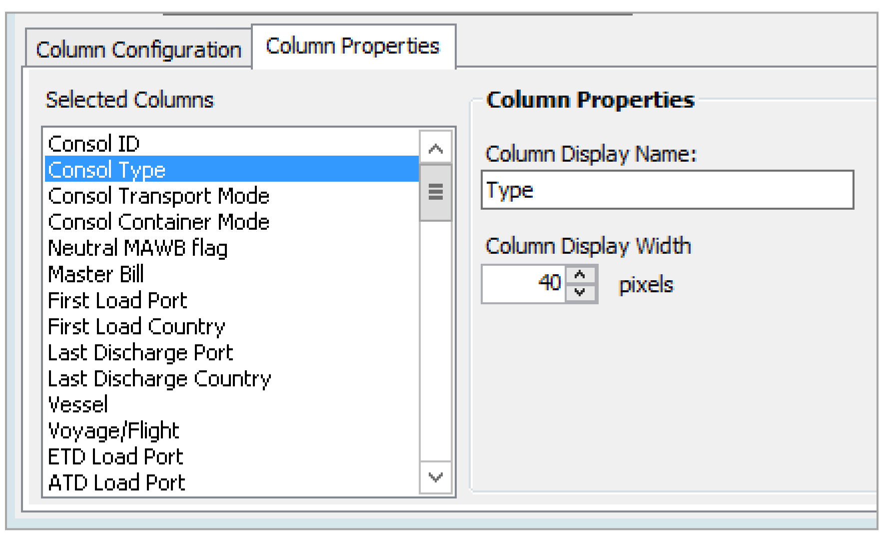


Column Configuration:

This section allows the user to determine what columns will appear on the report, and in which order. The Add, Remove, Move Up, and Move Down buttons are used to set the appearance and order of the report columns.

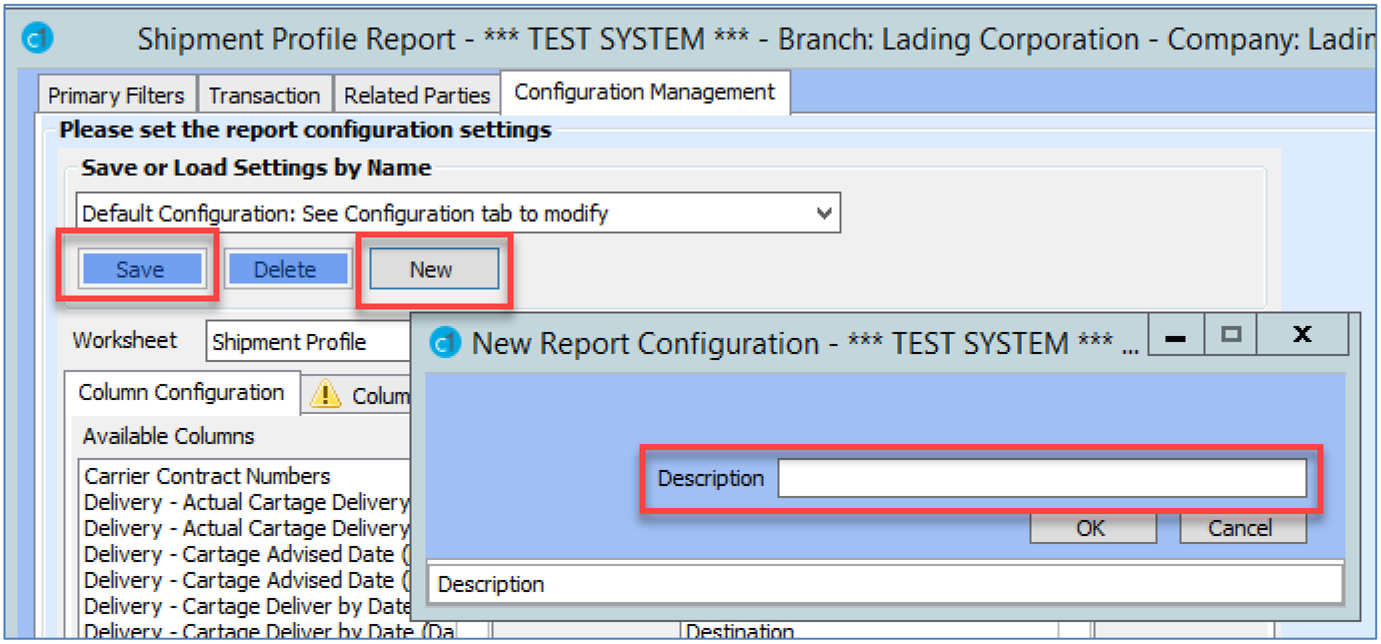
Column Properties:

Column properties are used to change the Default Column Display name and width.



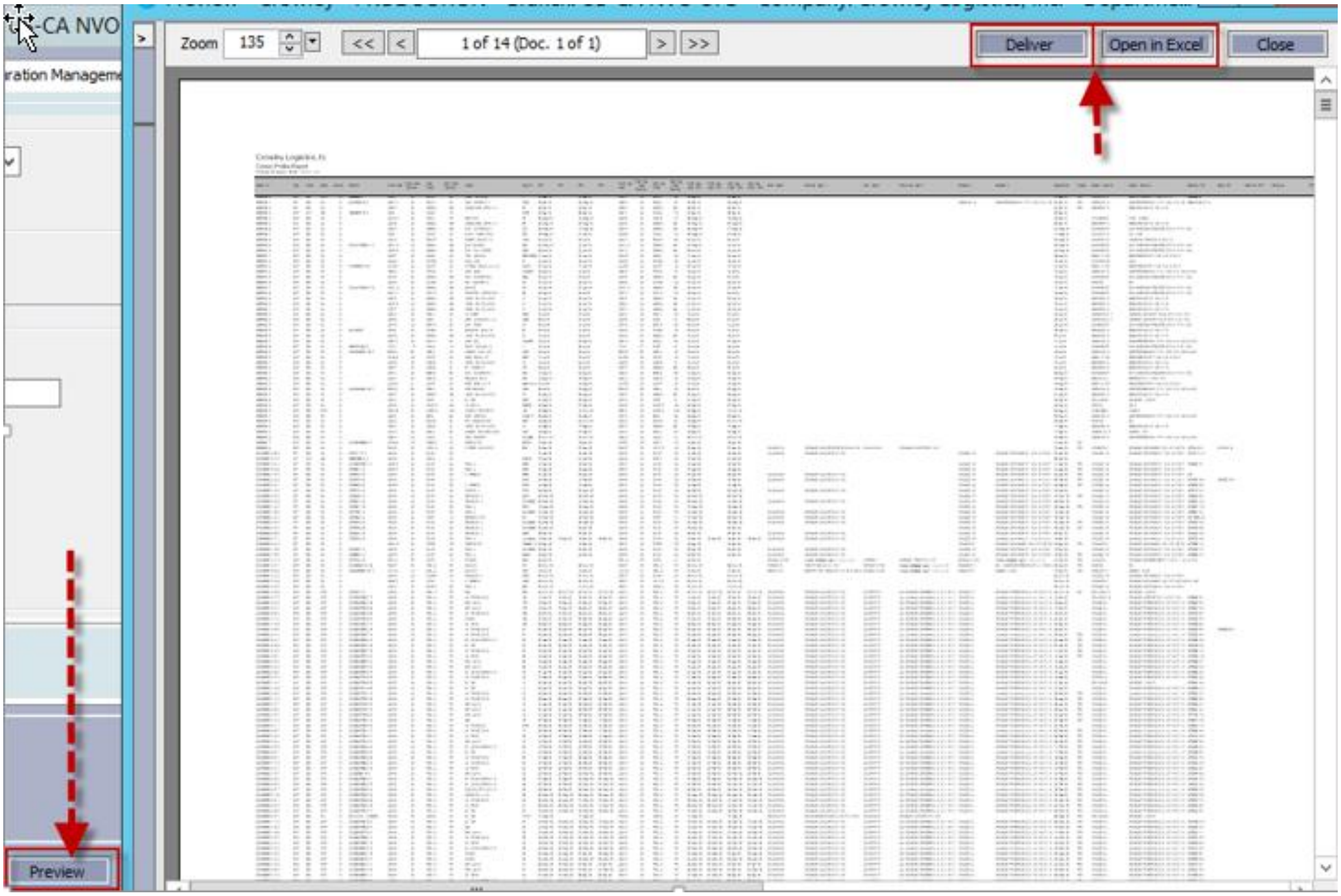
Save or Load Settings by Name

If a report is likely to be used again, a template can be saved from Configuration Management by using the "Save or Load Settings by name functionality.

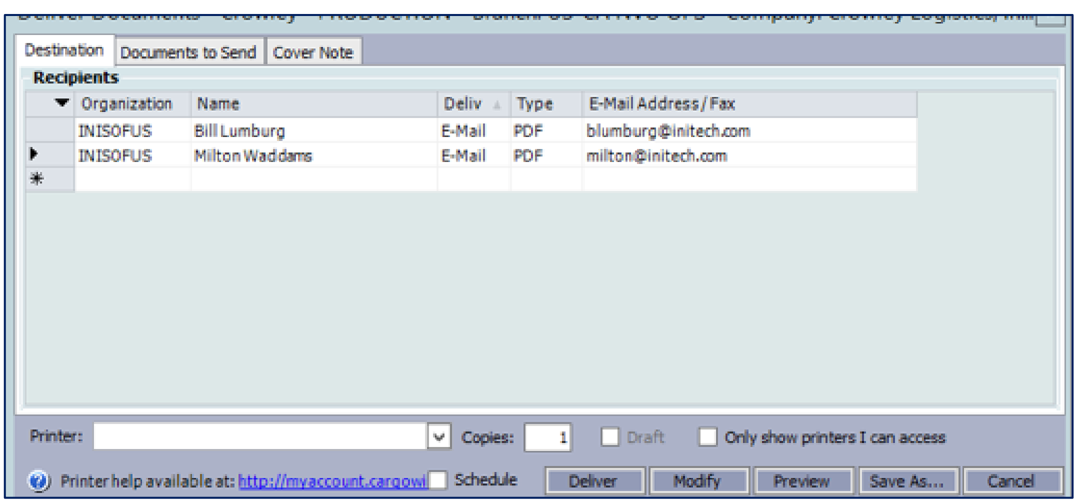


3.3 Previewing and Delivering Reports

Once you have set the filters, a report can be viewed by clicking on the "Preview" button on the bottom of the first screen. Once open in "preview", the report can delivered or Opened in Excel.



Any report can also be sent to email or printed through the standard "Deliver" functionality.



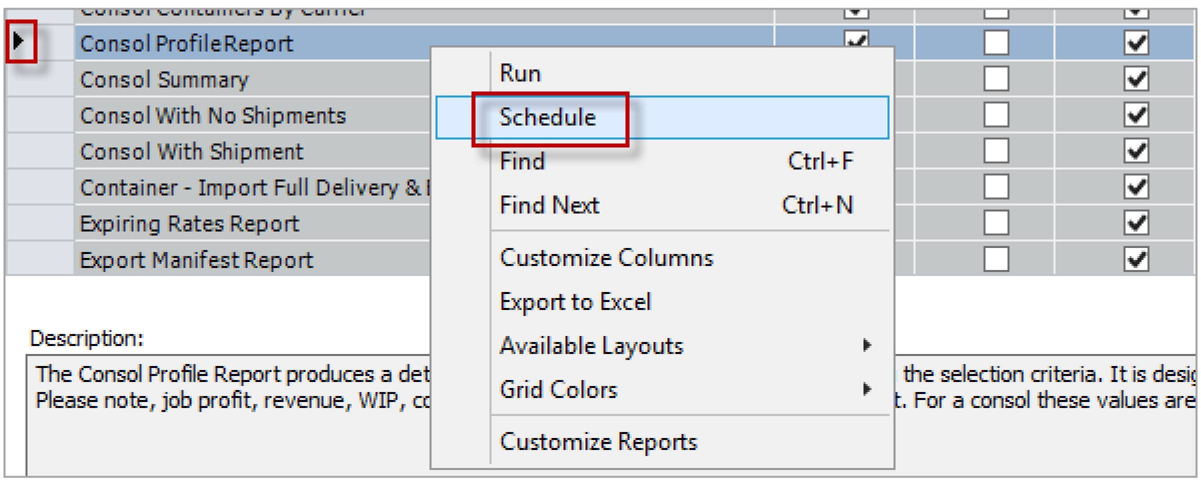
4 Scheduled Reports

4.1 Scheduling Delivery of a Report

If a report has been identified for re-occurring delivery to specific individuals, C1 supports automation of this task through the "Schedule" functionality.

Always check for existing schedules first, prior to setting up a new scheduled report.

Auto scheduling of reports can be configured by right clicking on the respective report, and selecting the "Schedule" option.

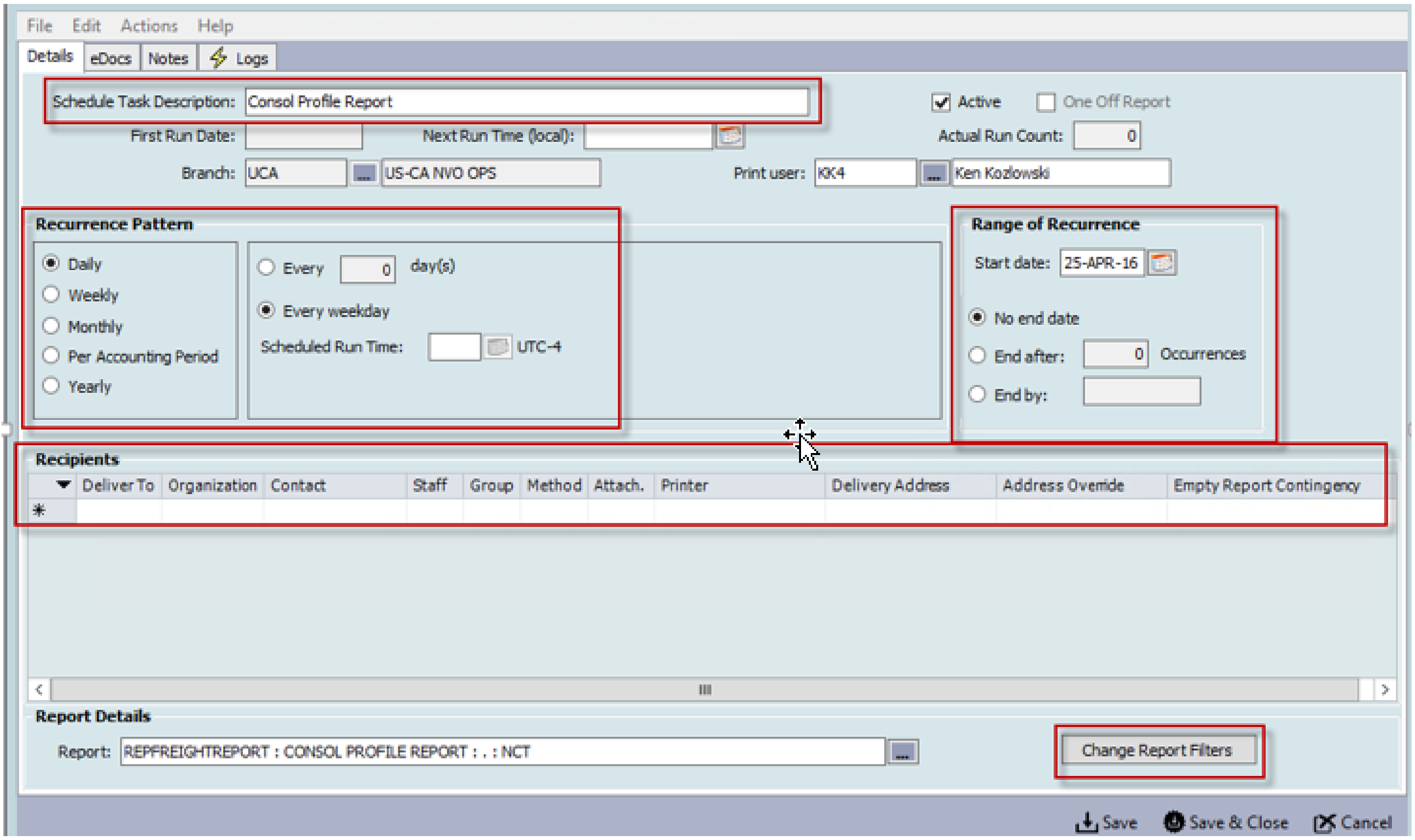


The "New Scheduled Report" window will open.

Identify the name to save it under using the proper naming convention described in the *"Naming a report, template, and/or schedule"* section of this document

Now you can identify the Recurrence Pattern, Duration (Range) and Recipients.

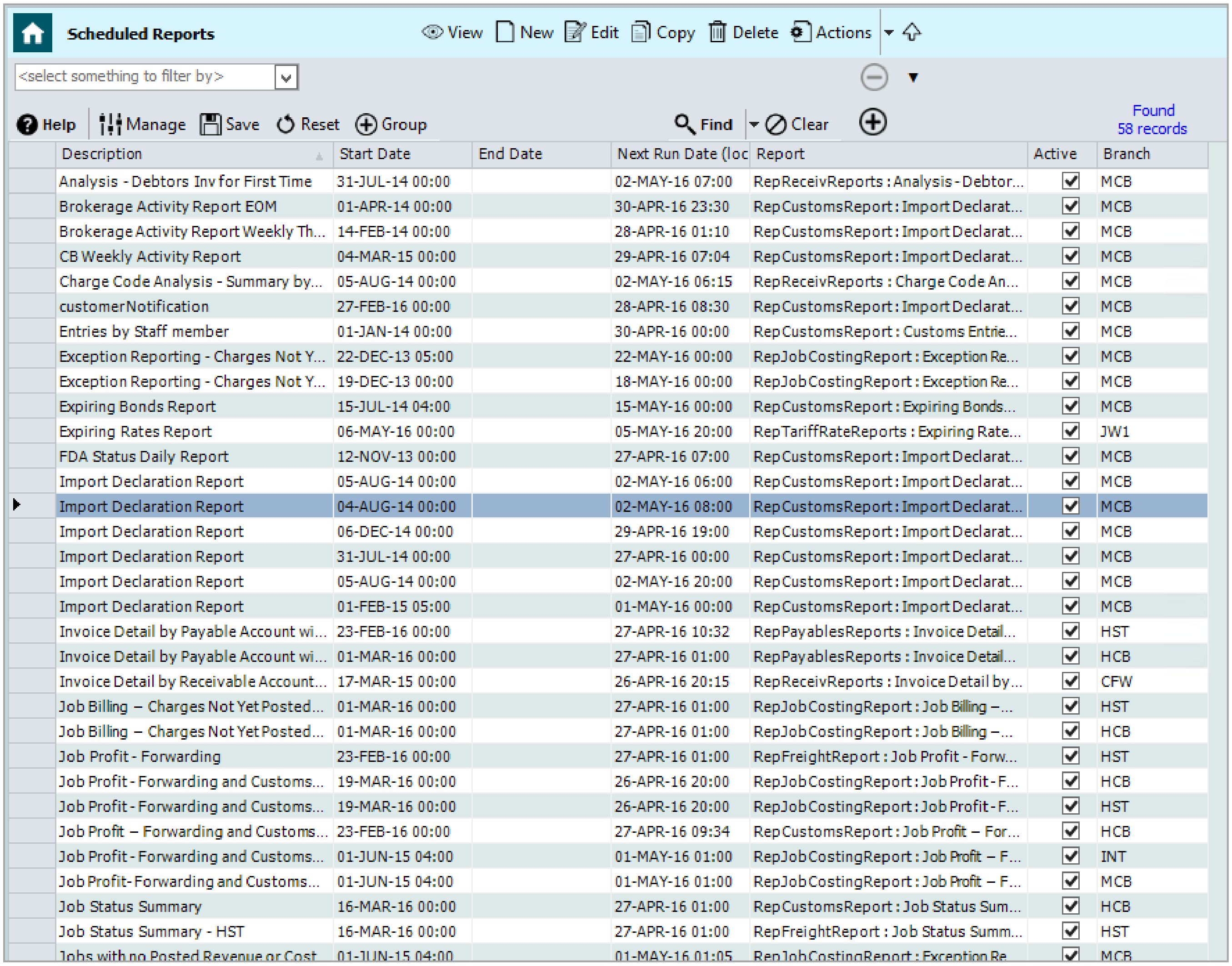
Report filters can be set by clicking on **'Change Report Filters'**.


File Edit Actions Help
Details eDocs Notes Logs
Schedule Task Description: Consol Profile Report
Active
One Off Report
First Run Date:
Next Run Time (local):
Actual Run Count: 0
Branch: UCA
US-CA NVO OPS
Print user: KK4
Ken Kozlowski
Recurrence Pattern
Daily
Weekly
Monthly
Per Accounting Period
Yearly
Every 0 day(s)
Every weekday
Scheduled Run Time:
UTC-4
Range of Recurrence
Start date: 25-APR-16
No end date
End after: 0 Occurrences
End by:
Recipients
Deliver To
Organization
Contact
Staff
Group
Method
Attach.
Printer
Delivery Address
Address Override
Empty Report Contingency
Report Details
Report: REPFREIGHTREPORT : CONSOL PROFILE REPORT : . : NCT
Change Report Filters
Save
Save & Close
Cancel

4.2 Manage Scheduled Reports

Existing reports can be viewed and managed in *Maintain > System > Scheduled Reports.*

Prior to setting up a new report, to avoid duplication, existing schedules should to be reviewed.



Scheduled Reports | View | New | Edit | Copy | Delete | Actions

<select something to filter by>

Help | Manage | Save | Reset | Group | Find | Clear | Found 58 records

Description	Start Date	End Date	Next Run Date (loc	Report	Active	Branch
Analysis - Debtors Inv for First Time	31-JUL-14 00:00		02-MAY-16 07:00	RepReceivReports : Analysis - Debtor...	✓	MCB
Brokerage Activity Report EOM	01-APR-14 00:00		30-APR-16 23:30	RepCustomsReport : Import Declarat...	✓	MCB
Brokerage Activity Report Weekly Th...	14-FEB-14 00:00		28-APR-16 01:10	RepCustomsReport : Import Declarat...	✓	MCB
CB Weekly Activity Report	04-MAR-15 00:00		29-APR-16 07:04	RepCustomsReport : Import Declarat...	✓	MCB
Charge Code Analysis - Summary by...	05-AUG-14 00:00		02-MAY-16 06:15	RepReceivReports : Charge Code An...	✓	MCB
customerNotification	27-FEB-16 00:00		28-APR-16 08:30	RepCustomsReport : Import Declarat...	✓	MCB
Entries by Staff member	01-JAN-14 00:00		30-APR-16 00:00	RepCustomsReport : Customs Entrie...	✓	MCB
Exception Reporting - Charges Not Y...	22-DEC-13 05:00		22-MAY-16 00:00	RepJobCostingReport : Exception Re...	✓	MCB
Exception Reporting - Charges Not Y...	19-DEC-13 00:00		18-MAY-16 00:00	RepJobCostingReport : Exception Re...	✓	MCB
Expiring Bonds Report	15-JUL-14 04:00		15-MAY-16 00:00	RepCustomsReport : Expiring Bonds...	✓	MCB
Expiring Rates Report	06-MAY-16 00:00		05-MAY-16 20:00	RepTariffRateReports : Expiring Rate...	✓	JW1
FDA Status Daily Report	12-NOV-13 00:00		27-APR-16 07:00	RepCustomsReport : Import Declarat...	✓	MCB
Import Declaration Report	05-AUG-14 00:00		02-MAY-16 06:00	RepCustomsReport : Import Declarat...	✓	MCB
Import Declaration Report	04-AUG-14 00:00		02-MAY-16 08:00	RepCustomsReport : Import Declarat...	✓	MCB
Import Declaration Report	06-DEC-14 00:00		29-APR-16 19:00	RepCustomsReport : Import Declarat...	✓	MCB
Import Declaration Report	31-JUL-14 00:00		27-APR-16 00:00	RepCustomsReport : Import Declarat...	✓	MCB
Import Declaration Report	05-AUG-14 00:00		02-MAY-16 20:00	RepCustomsReport : Import Declarat...	✓	MCB
Import Declaration Report	01-FEB-15 05:00		01-MAY-16 00:00	RepCustomsReport : Import Declarat...	✓	MCB
Invoice Detail by Payable Account wi...	23-FEB-16 00:00		27-APR-16 10:32	RepPayablesReports : Invoice Detail...	✓	HST
Invoice Detail by Payable Account wi...	01-MAR-16 00:00		27-APR-16 01:00	RepPayablesReports : Invoice Detail...	✓	HCB
Invoice Detail by Receivable Account...	17-MAR-15 00:00		26-APR-16 20:15	RepReceivReports : Invoice Detail by...	✓	CFW
Job Billing – Charges Not Yet Posted...	01-MAR-16 00:00		27-APR-16 01:00	RepJobCostingReport : Job Billing –...	✓	HST
Job Billing – Charges Not Yet Posted...	01-MAR-16 00:00		27-APR-16 01:00	RepJobCostingReport : Job Billing –...	✓	HCB
Job Profit - Forwarding	23-FEB-16 00:00		27-APR-16 01:00	RepFreightReport : Job Profit - Forw...	✓	HST
Job Profit - Forwarding and Customs...	19-MAR-16 00:00		26-APR-16 20:00	RepJobCostingReport : Job Profit - F...	✓	HCB
Job Profit - Forwarding and Customs...	19-MAR-16 00:00		26-APR-16 20:00	RepJobCostingReport : Job Profit - F...	✓	HST
Job Profit – Forwarding and Customs...	23-FEB-16 00:00		27-APR-16 09:34	RepCustomsReport : Job Profit – For...	✓	HCB
Job Profit - Forwarding and Customs...	01-JUN-15 04:00		01-MAY-16 01:00	RepJobCostingReport : Job Profit – F...	✓	INT
Job Profit- Forwarding and Customs...	01-JUN-15 04:00		01-MAY-16 01:00	RepJobCostingReport : Job Profit – F...	✓	MCB
Job Status Summary	16-MAR-16 00:00		27-APR-16 01:00	RepCustomsReport : Job Status Sum...	✓	HCB
Job Status Summary - HST	16-MAR-16 00:00		27-APR-16 01:00	RepFreightReport : Job Status Summ...	✓	HST
Jobs with no Posted Revenue or Cost	01-JUN-15 04:00		01-MAY-16 01:05	RepJobCostingReport : Exception Re...	✓	MCB

Double click on any existing scheduled report which will open up the "Edit Scheduled Report" window.

In order to modify existing schedules, the **"print user"** needs to be consulted to avoid any negative impact.

4.3 Suggested Naming Conventions

To ensure quick and easy recognition of standard templates and to avoid duplicated templates, the below naming convention should be followed when configuring report templates and delivery schedules:

1. Country Code or city code (for example US for United States, CR for Costa Rica, JAX for Jacksonville, HOU for Houston, etc.)
2. Shipment Mode – if applicable (for example AIR for Airfreight)
3. Department / Direction – if applicable (for example IMPORT)
4. Frequency (for example WEEKLY)
5. Meaning / Description name (for example SUMMARY)

Each of the above identifier should be written in CAPS and separated by 'space, dash, space'.

No other information / data should be included in the naming of a report or schedule.

Example:

HOU-AIR-IMPORT-WEEKLY SUMMARY

On scheduled reports, the Name of the report will appear as the subject line if the report is sent via e-mail.