

Reports Overview



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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/](mailto: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:

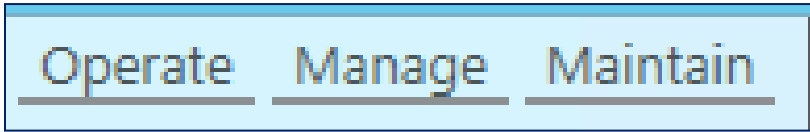
- Running a report
- Scheduling delivery of a report
- Managing scheduled reports
- Naming a report, template, and/or schedule



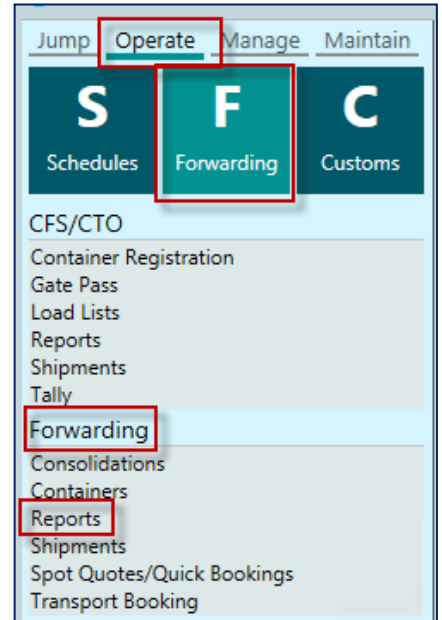
Access to reports is security based, not all users will have access to all reports.



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.



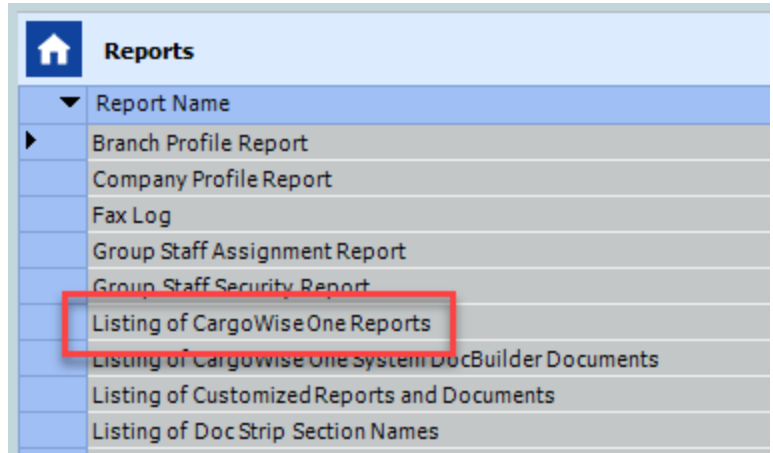
In almost all cases, when a section is opened (in the illustrated case to the right, *Operate>Forwarding>Forwarding*) "Reports" will be listed where it falls alphabetically in the list of items.



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
<u>ComplianceReport</u>				
Compliance Tax Report		Y	N	
Day Book Report		Y	N	
VAT Register Report		Y	N	CTY=IT
<u>DocReportCustomiser</u>				
Report Reference Guide		Y	N	
<u>RepAccountReports</u>				
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.

The screenshot shows a web application interface for a 'Reports' list. The table has columns for 'Report Name', 'System', 'Client', and 'Published'. A red dashed box highlights the 'System', 'Client', and 'Published' columns, with an arrow pointing to a callout box labeled 'System Defaults'. Another red dashed box highlights the 'Client Rates Summary' row, with an arrow pointing to a callout box labeled 'Report Description of chosen report'. A third red dashed box highlights the 'Description:' field at the bottom, which contains the text: 'Rates Summary Report is designed to assist the comparison and evaluation of the realized sales performance by both client and sales representative.'

Report Name	System	Client	Published
Agent Summary Volume & Profit Analysis by Client - Forwarding	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Air Consol MAWB Allocations by Carrier	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Bookings - Carrier Booking Status Report	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Bookings - Consignor Booking Status Report	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Bookings - Export Bookings Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Cartage - Import Delivery Report	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Client - Booking Summary	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Client - Current Export Shipments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Client - Job And Invoiced Charge Summary for Selected Client	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Client - Shipment Listing Report	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Client Rates by Client Summary	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Client Rates Summary	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Client Summary Analysis - Forwarding	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Client Summary Two Period Volume & Profit Analysis - Forwarding	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Client Summary Volume & Profit Analysis - Forwarding	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Company Tariffs Summary	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Consol Containers by Carrier	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Consol Profile Report	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Consol Summary	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Consol With No Shipments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Consol With Shipment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Container - Import Full Delivery & Empty Return Master Report	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Expiring Rates Report	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Export Manifest Report	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Description:
Rates Summary Report is designed to assist the comparison and evaluation of the realized sales performance by both client and sales representative.



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.

Primary Filters | Leg Port, ETD and ETA Filters | Related Parties Filters | Configuration Management

Primary Filters

Configuration

Transport Mode:

Container Mode:

Consol Type:

First Load Location: {None Selected}

Last Disch Location: {None Selected}

Consol Registered From To

Only Invoicing Jobs Only Records with Billing Job Headers in Login Compar

Include Inactive Include Inactive Consols

Sort the report in this order

Consol ID

Sending Agent

Receiving Agent

[Create Shortcut](#) Orientation DEF (default)



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.

The screenshot shows the "Configuration Management" tab selected in a software interface. The interface is divided into several sections:

- Primary Filters:** Includes "Leg Port, ETD and ETA Filters", "Related Parties Filters", and "Configuration Management" (highlighted with a red box).
- Please set the report configuration settings:**
 - Save or Load Settings by Name:** A dropdown menu shows "Default Configuration: See Configuration tab to modify". Below it are "Save", "Delete", and "New" buttons.
 - Worksheet:** A dropdown menu shows "ConsolProfileReport".
 - Column Configuration:** A tabbed interface with "Column Properties" selected.
- Available Columns:** A list of columns including "Carrier Contract Numbers" and "Is Active".
- Shown Columns in this order:** A list of columns including "Consol ID", "Consol Type", "Consol Transport Mode", "Consol Container Mode", "Neutral MAWB flag", "Master Bill", "First Load Port", "First Load Country", "Last Discharge Port", "Last Discharge Country", "Vessel", "Voyage/Flight", and "ETD Load Port".
- Sort the report in this order:** Radio buttons for "Consol ID" (selected), "Sending Agent", and "Receiving Agent".
- Orientation:** A dropdown menu showing "DEF" (default).
- Buttons:** "Preview", "Deliver", and "Close".

The screenshot shows the "Column Properties" dialog box, which is used to configure the display of a selected column. The dialog is divided into two main sections:

- Selected Columns:** A list of columns including "Consol ID", "Consol Type" (highlighted), "Consol Transport Mode", "Consol Container Mode", "Neutral MAWB flag", "Master Bill", "First Load Port", "First Load Country", "Last Discharge Port", "Last Discharge Country", "Vessel", "Voyage/Flight", "ETD Load Port", and "ATD Load Port".
- Column Properties:**
 - Column Display Name:** A text input field containing "Type".
 - Column Display Width:** A numeric input field containing "40" and a "pixels" label.



Save or Load Settings by Name

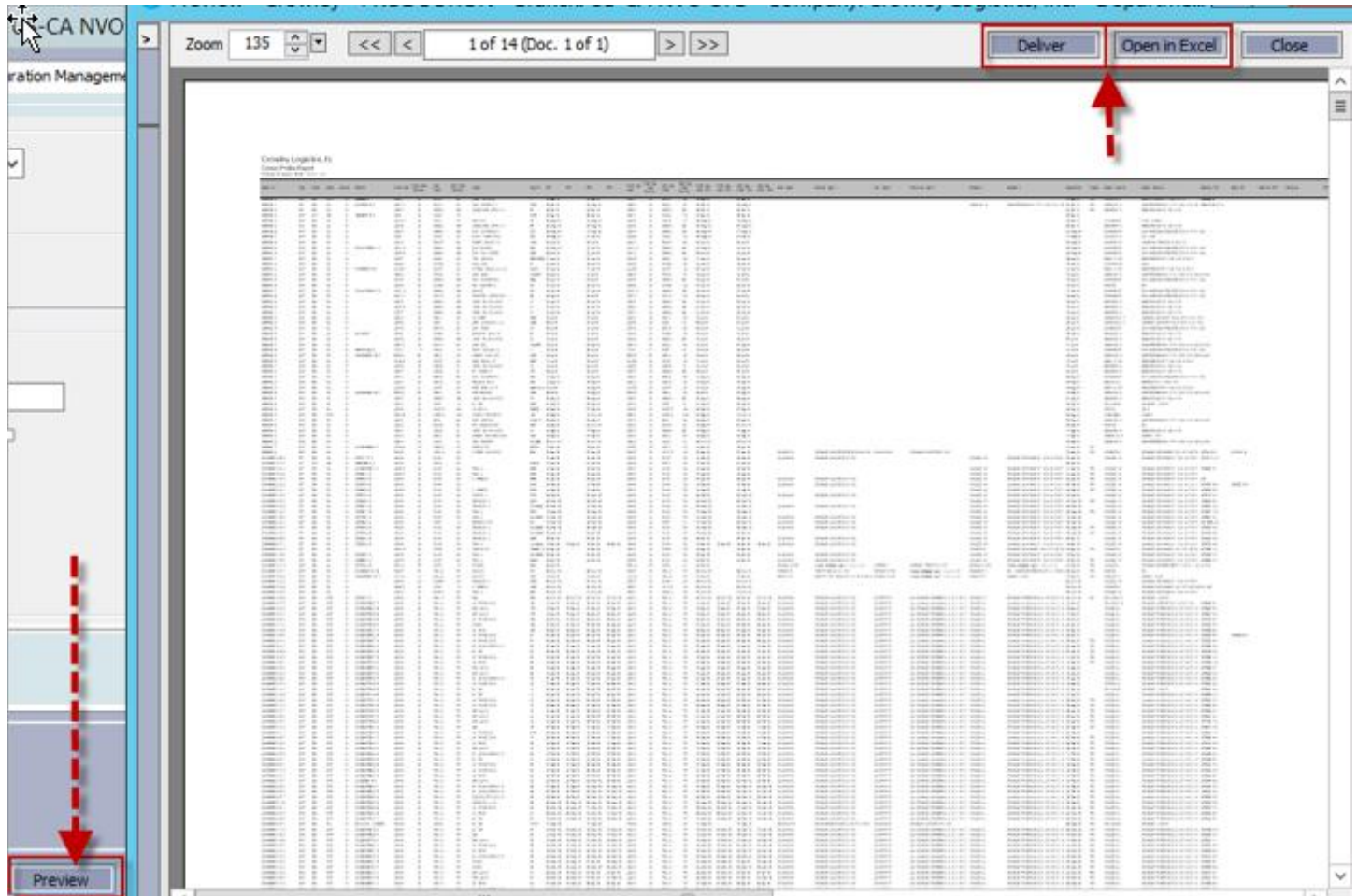
If a report is likely to be used again, a template can be saved from Configuration Management by using the "Save or Load Settings by name" functionality.

The screenshot displays the 'Shipment Profile Report - *** TEST SYSTEM *** - Branch: Lading Corporation - Company: Lading Corporation' window. The 'Configuration Management' tab is active, showing a 'Please set the report configuration settings' dialog. Within this dialog, the 'Save or Load Settings by Name' section includes a dropdown menu with the text 'Default Configuration: See Configuration tab to modify'. Below the dropdown are three buttons: 'Save', 'Delete', and 'New', all of which are highlighted with red boxes. A 'New Report Configuration - *** TEST SYSTEM *** ...' dialog is also open, featuring a 'Description' text input field and 'OK' and 'Cancel' buttons, with the input field also highlighted by a red box. In the background, a 'Worksheet' titled 'Shipment Profile' is visible, showing a 'Column Configuration' section with a warning icon and a list of 'Available Columns' including 'Carrier Contract Numbers', 'Delivery - Actual Cartage Delivery', and 'Delivery - Cartage Advised Date'.

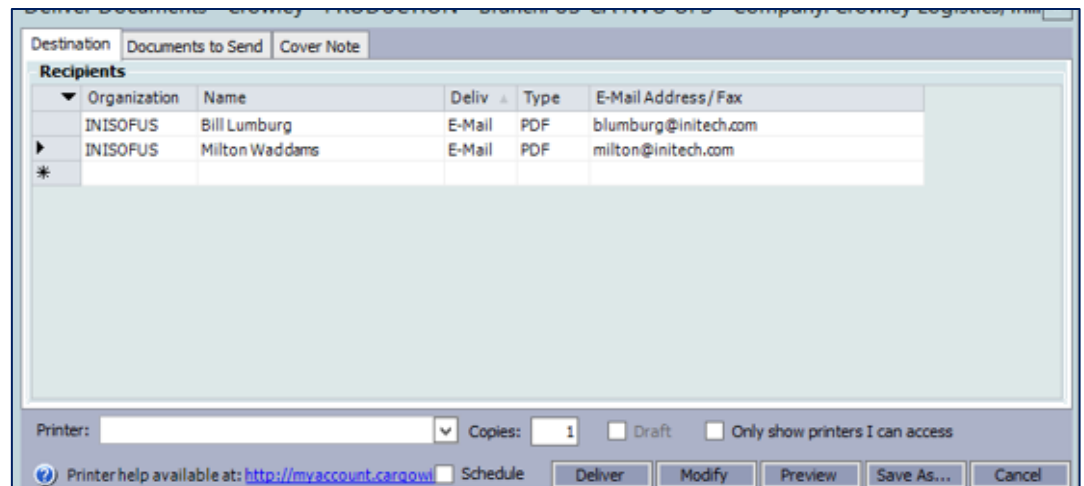


3.3 Previewing and Delivering Reports

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 be delivered or Opened in Excel.



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



4 Scheduled Reports

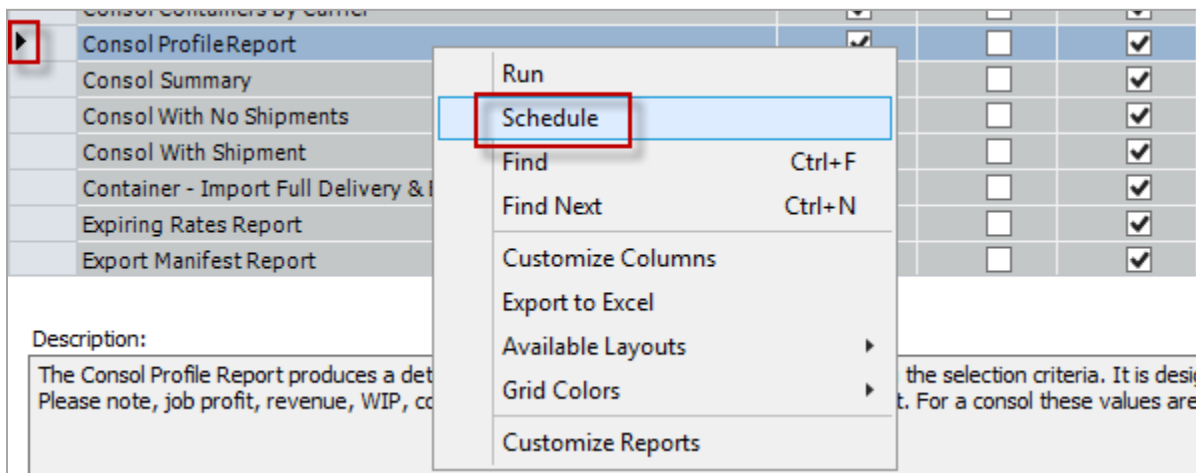
4.1 Scheduling Delivery of a Report

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:

Active One Off Report
 First Run Date: Next Run Time (local): Actual Run Count:

Branch: Print user:

Recurrence Pattern

Daily
 Weekly
 Monthly
 Per Accounting Period
 Yearly

Every day(s)
 Every weekday
 Scheduled Run Time: UTC-4

Range of Recurrence

Start date:

No end date
 End after: Occurrences
 End by:

Recipients

Deliver To	Organization	Contact	Staff	Group	Method	Attach.	Printer	Delivery Address	Address Override	Empty Report Contingency
*										

Report Details

Report:



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

TAKENOTE



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

