Understanding Reporting

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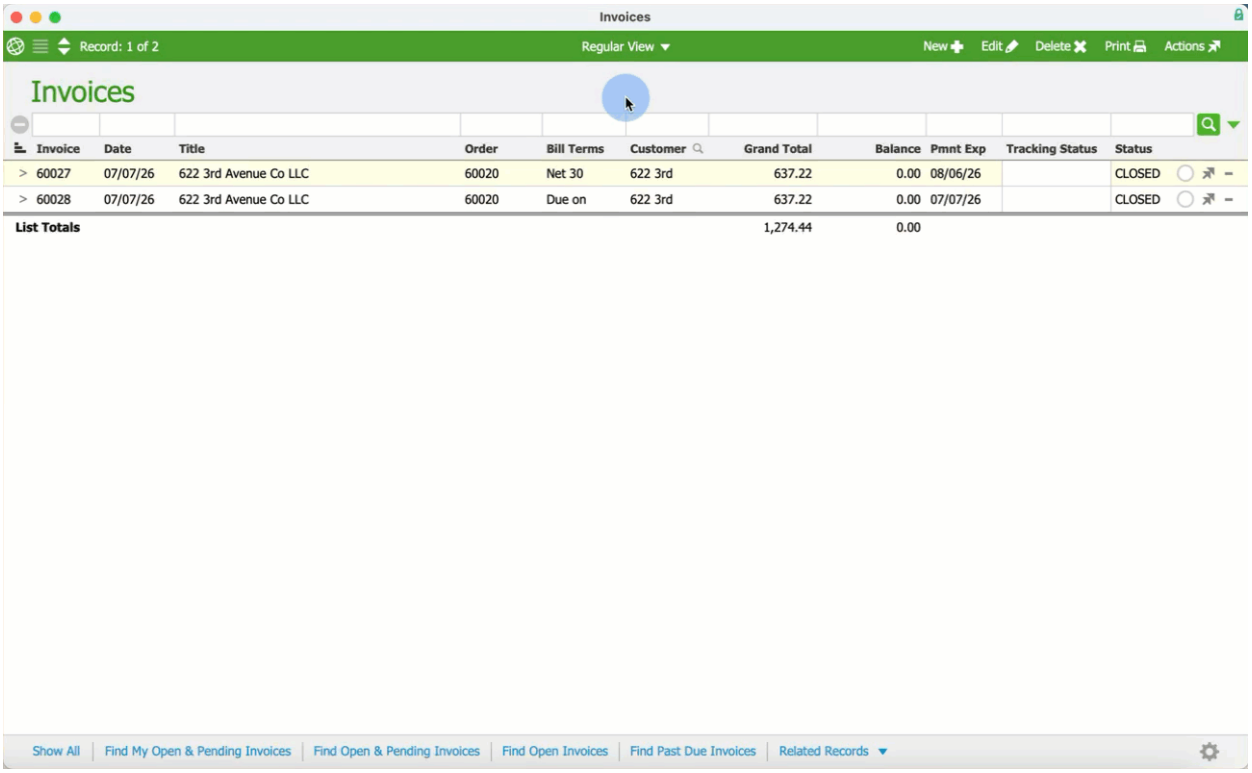
> This guide explains navigating out-of-the-box reports and requesting custom reports. It is intended for general users.

aACE developers have used FileMaker to build a variety of out-of-the-box reports that are included in every aACE system. Default reports are distributed to all Maintenance subscribers in Report Packs. Each Report Pack includes all previously-released reports.

Multiple reporting tools are available in most aACE modules. These reports usually focus on the records displayed in the module list view (https://aace6.knowledgeowl.com/help/overview-of-the-list-view). This guide uses the Invoices module (Main Menu > Accts Receivable > Invoices) as an example.

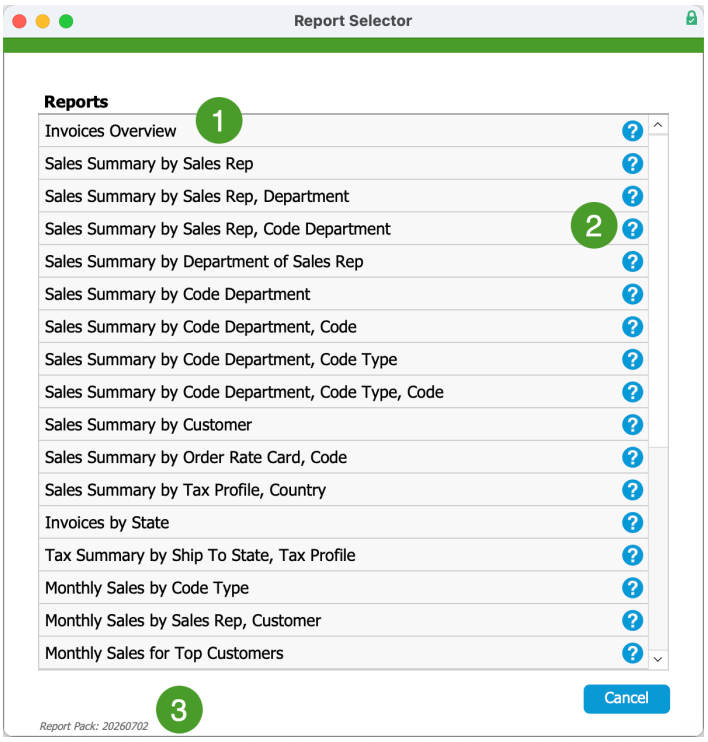
Generating Reports

Select Print to access some of the most commonly used reports. You can also access additional reports by selecting Print > Open Report Selector.



Using the Report Selector

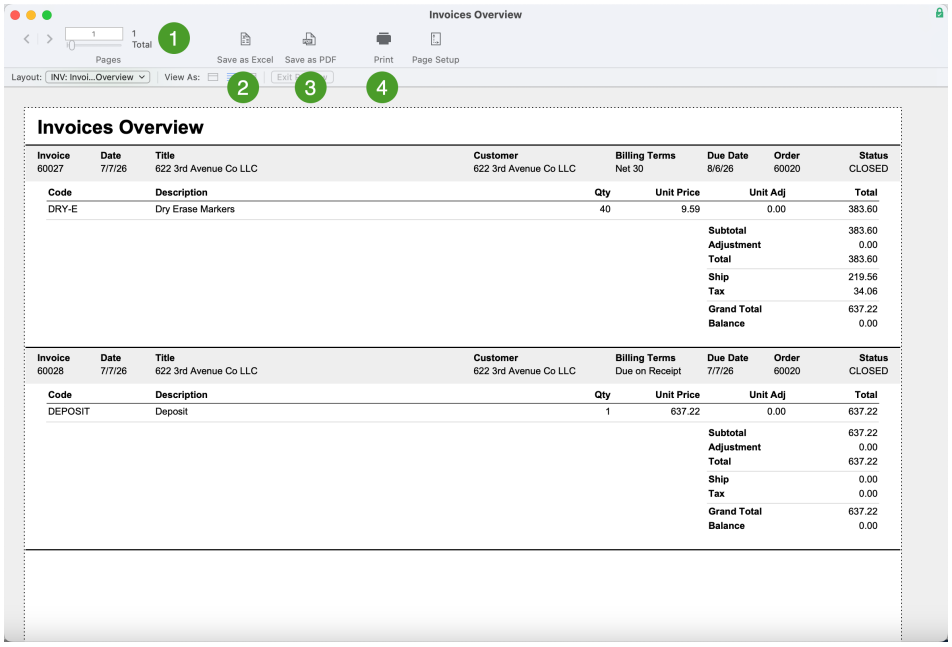
The Report Selector provides additional reports and functionality related to the current module.



1. **Generate a report** — Select the report name to generate the report. aACE prompts you for any needed information.
2. **Review details about a report** — Select the Report Detail icon (?) to display the report contents.
3. **Verify your Report Pack version** — Important information to convey to the your aACE Support Representative when inquiring about reports.

Navigating Reports

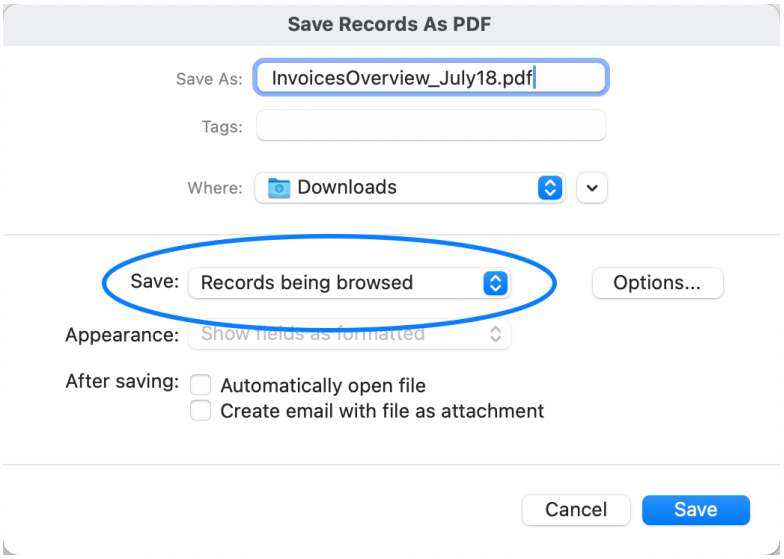
After you generate a report, use the controls in the FileMaker report header to navigate, save, or print the report:



1. Change the report page by:
    - Selecting the arrows to move forward or backwards one page at a time
    - Typing in a page number
    - Moving the page slider
2. Save the report data as an editable Excel spreadsheet
   This export is created by FileMaker (https://aace6.knowledgeowl.com/help/understanding-the-filemaker-save-as-excel-button). aACE does not control the appearance and quality of the export results.
3. Save the report data as a static PDF file
4. Print the report

Saving or Printing the Browsed Records

When you save or print a report, verify the Save field is Records being browsed. This ensures that all the information displayed on the report is included in the saved file or the printout.



Understanding Report Updates

Report Pack updates are distributed to all Maintenance subscribers during scheduled maintenance updates. These updates might include modifications to previously-released reports in addition to new reports.

Understanding Custom Reports

Occasionally users might find that they require a report that does not exist in the installed Report Pack. Unfortunately, the FileMaker development environment does not currently provide the ability to create custom reports instantly.

Instead, each report in the aACE Report Pack has been developed using the following process:

1. Submit a request to your system administrator including:
    - Clear specifications for the report
    - Your current Report Pack version number
2. Your system administrator provides this information to your aACE Support Representative.
3. Your aACE Support Representative works with aACE developers to determine whether the requested report could be added to the Report Pack.

Some report requests will not be added to the Report Pack. Usually this is because they are not widely applicable or because they rely on fields custom to your aACE system. In such

cases, an aACE developer can develop and install the report custom to your business.

Most companies only generate a handful of reports on a regular basis. These reports should be printed from your aACE system, either using a report in the Report Pack or a custom report. If your business processes require ad hoc reporting, we recommend either exporting the data from aACE as an Excel spreadsheet or integrating with a business analytics solution like Tableau.

Customizing Customer or Vendor Reports

Certain reports are related to a transaction you would send to a customer (e.g. sending an order, invoice, or receipt). System administrators can edit these print layouts (https://aace6.knowledgeowl.com/help/editing-print-layouts).

aACE Complete customers that customize reports might have their updates overwritten by semi-annual maintenance updates. We recommend keeping precise and thorough notes about your customizations to make it easy to recreate them, if necessary.