



REPORTER by ReadSoft

REPORTER 5-4

Quick Start Guide

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Introduction

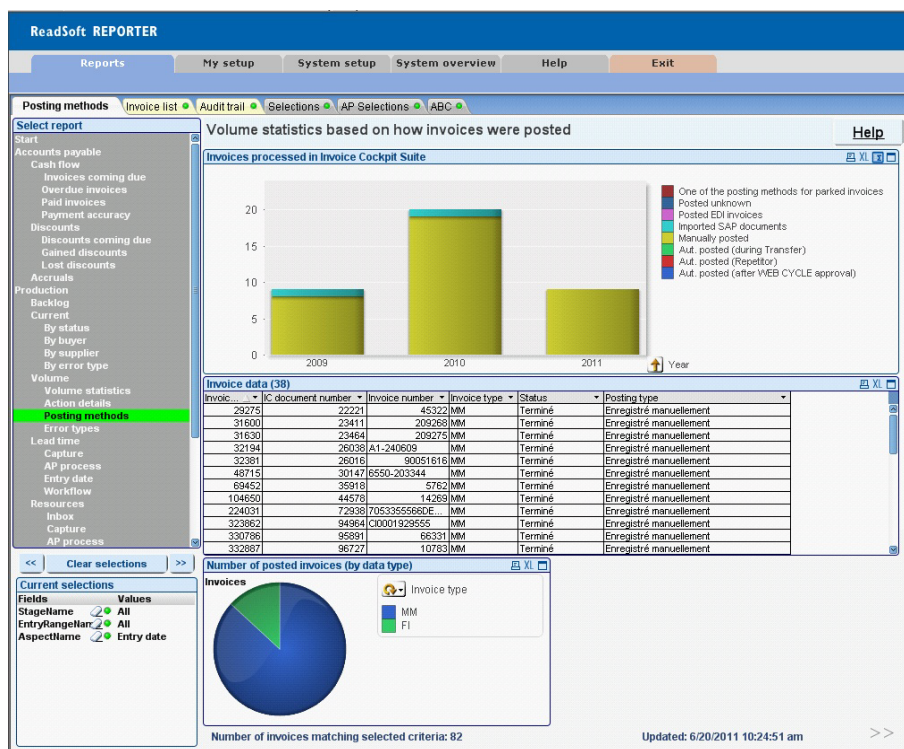
REPORTER is an optional product for use with ReadSoft INVOICES either alone or in combination with ReadSoft INVOICEIT/PROCESSIT (Oracle) or ReadSoft Invoice Cockpit Suite (SAP). REPORTER collects data from your INVOICES and/or ERP system creating historical records that you can view and analyze with an easy-to-use graphical interface. You can use REPORTER to monitor invoice processing efficiency and user performance from a web browser (Internet Explorer).

REPORTER quickly displays the information you need using an assortment of tables, graphs, and more. You can use REPORTER to create reports based on a variety of criteria such as:

- Date and time
- Supplier
- User (operator)
- Document type
- Document status

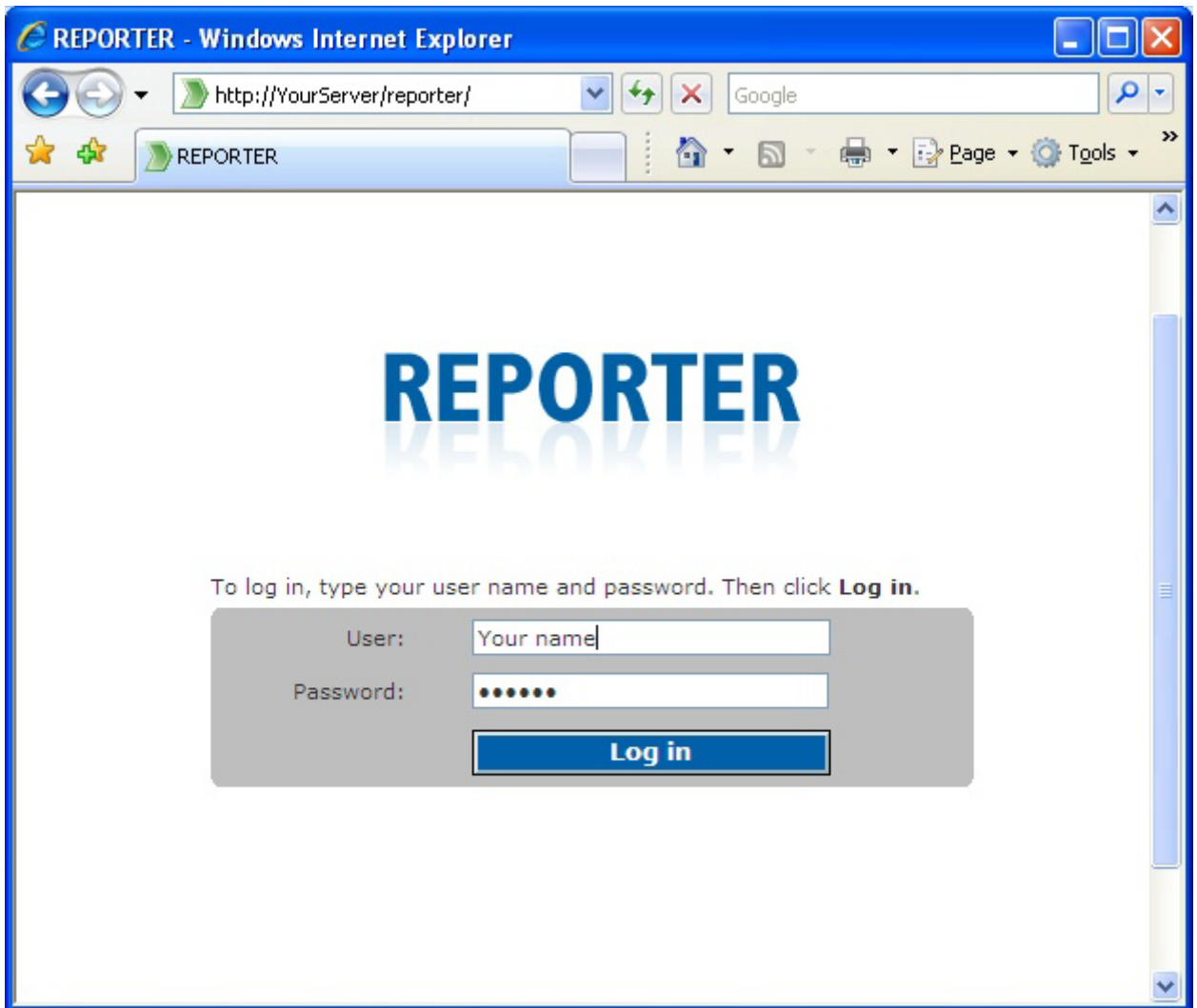
This guide assumes that REPORTER is already installed. It covers the basics of REPORTER operation:

- Logging in
- Viewing reports
- System setup
- System overview
- My setup
- Help
- REPORTER configuration



Logging in

1. Open Microsoft Internet Explorer (version 6 or later).
2. In the **Address** box, type the name of the REPORTER server and press **Enter**. The login page is displayed.



3. To log in using the default system administrator account, type the default user name ("iasa") and password ("secret") and click **Log in**.

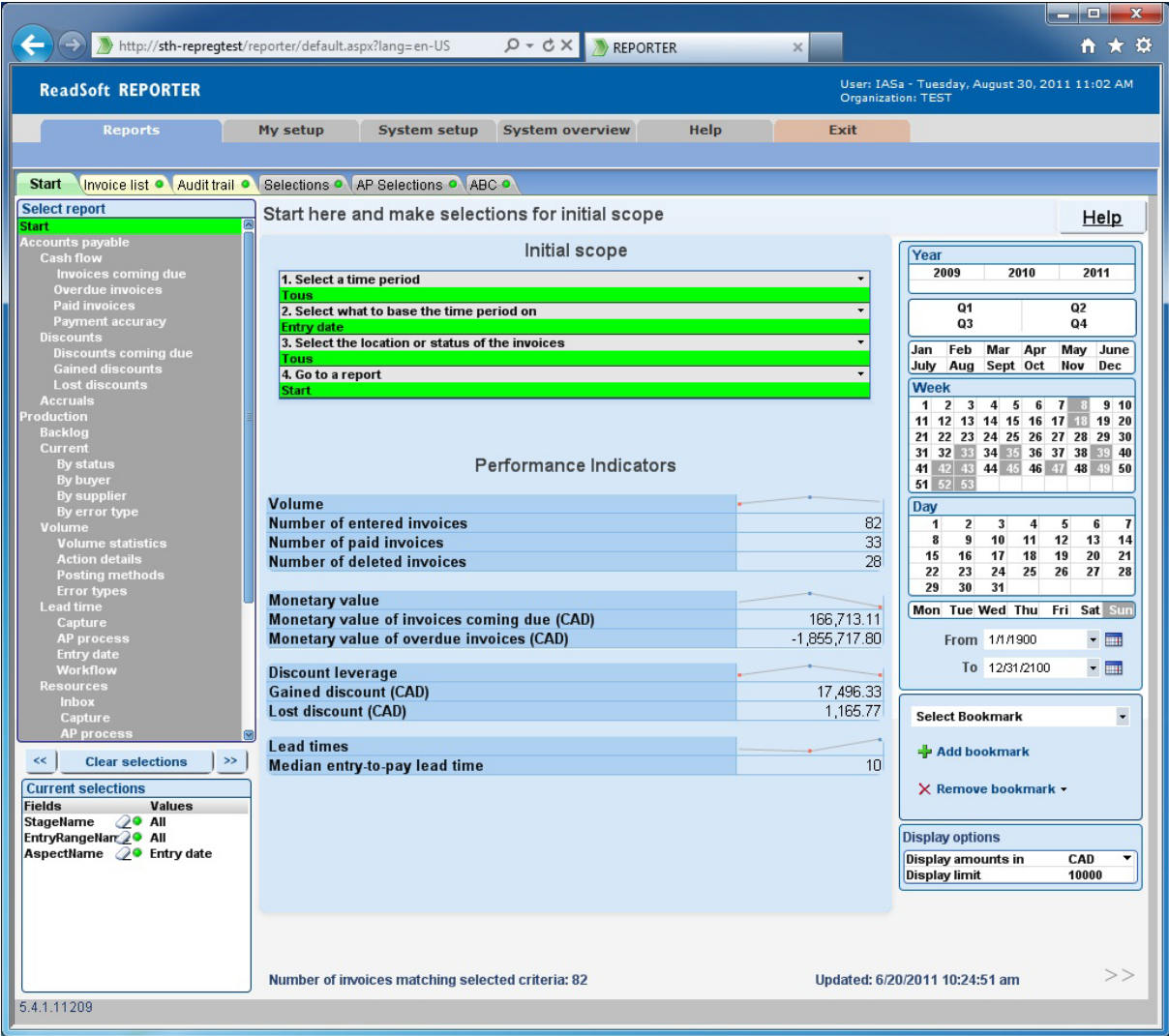
If that user name and password is not valid, log in using a user name and password obtained from your system administrator.



Viewing reports

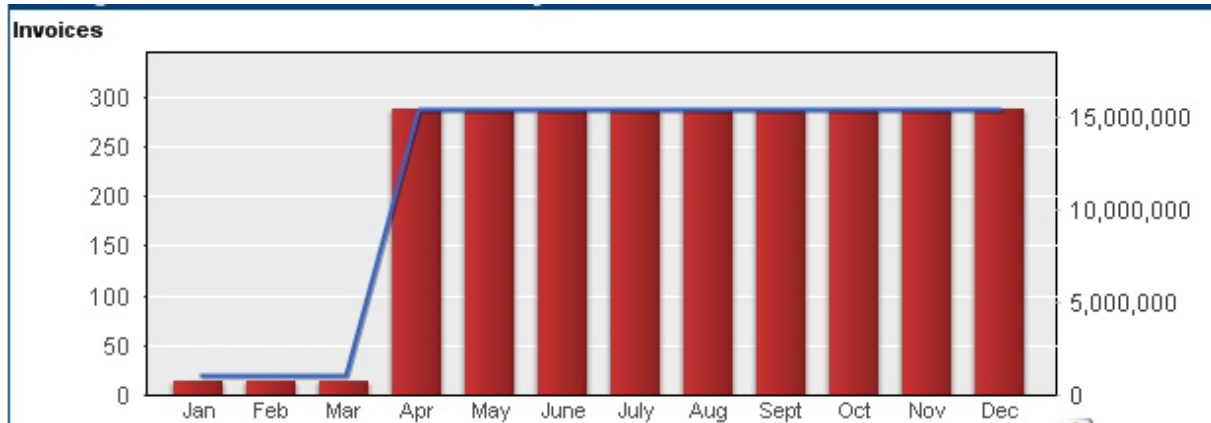
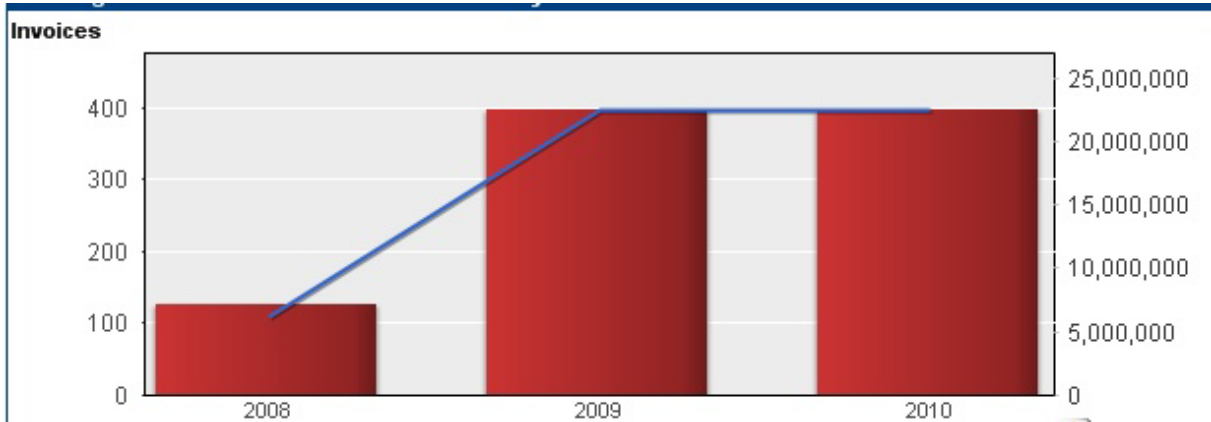
After you log in, click **Reports**. The **Start** tab is displayed, where you can specify the initial scope of your reports. Then click a report in the list on the left side to display a report.

Note that the options and tabs that appear can vary depending on your installation.



Changing the scope of a report using selection criteria

Most of the objects in the reports are interactive, and clicking them changes the scope of the report. For example, in the graph below, clicking the 2010 bar narrows the scope of the report to the year 2010.



This image represents what is displayed when 2009 was clicked in the previous image

In the example above, you could also use your mouse to draw a box around two bars to change the scope accordingly.



Each time you change the scope of the report, the results can be seen in three places:

1. The **Current Selections** list in the bottom left corner:

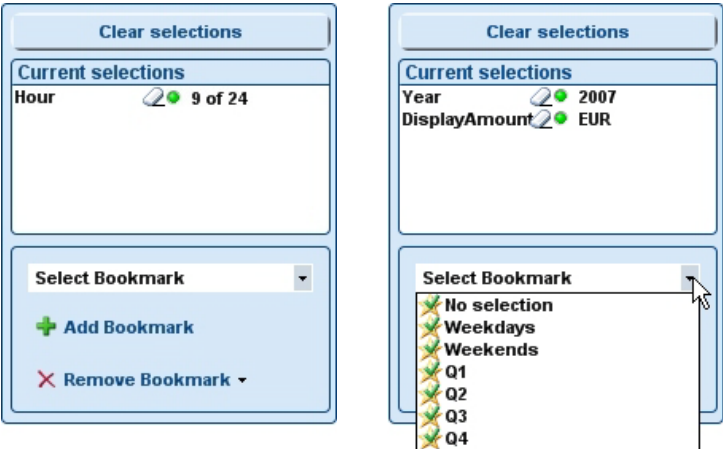


2. The **Selections** tab (if INVOICES is connected to the system).
3. The **AP Selections** tab (if ICS or INVOICEIT/PROCESSIT is connected to the system).

At any time, you can, for example:

- Click **Clear selections** to return the report to its default state.
- Right-click any criteria and select **Clear** to clear only that selection, or select **Clear Other Fields** to keep only that selection.
- Save your current selection by clicking **Add Bookmark**. (Delete unwanted bookmarks by clicking **Remove Bookmark** and selecting the bookmark you want to remove from the list.)

Many more options are described in *REPORTER Help*.



You can manage your selections using bookmarks.



When you make a selection, or change the scope of a report by any means, the selection applies to *all* reports. For example, if you narrow the scope of the Overview of volume statistics report to the year 2010, and then view the Overview of user resources report, the information in the user resources report is also limited to 2010 until you change the selection criteria again.

Colors show selection options and status:

- White items are available for selection.
- Gray items either conflict with current selections (for example **31** turns gray if you select **April**, because there is no April 31) or there is no data for the selection.
You can select gray items. However, the current selection(s) that conflict with that gray item are cleared.
- Green items are currently selected. You can click a green item again to deselect it.
- Blue items are locked. To unlock a blue item, right-click it and select **Unlock**.



System setup

The **System setup** menu is visible only to system administrators. Here you can manage REPORTER's users, currencies, and users of connected applications.

REPORTER users

On the **REPORTER users** page you can view, add, modify, or delete user profiles.

Creating a new user profile

You must be a system administrator to create new user profiles for REPORTER.

1. Click **System setup** > **REPORTER users**.
2. Click **New user**.

The screenshot shows the 'REPORTER users' management interface. At the top, there is a navigation bar with tabs for 'Reports', 'My setup', 'System setup', 'System overview', 'Help', and 'Exit'. Below this, a breadcrumb trail reads 'REPORTER users | Currencies | Users of connected applications'. The main content area is titled 'User:' and contains a form for creating a new user. The form has three buttons at the top: 'Save', 'Close', and 'Help'. On the left side of the form, there is a vertical menu with four options: 'User info' (highlighted in blue), 'Preferences', 'Notes', and 'Log'. The main form fields are: 'Name:' with a text input box, 'Employee ID:' with a text input box, 'Password:' with a text input box, and 'Confirm password:' with a text input box. Below these fields, there is a 'System rights:' section with a dropdown menu currently set to 'User' and a 'Search...' button. At the bottom, there is a 'Status:' section with two radio buttons: 'Active' (which is selected) and 'Disabled'.

3. Use these settings to define the new user. Begin with the **User info** settings.
 - Type the user's name. The user name must be unique.
 - Type an employee ID.
 - Type a password for the user (twice).
 - Optional: Change the user's system rights.
4. Optional: Click **Preferences** and select the language that the user prefers and which page to display when the user accesses the program.
5. Click **Save** and **Close**.



Currencies

On the **Currencies** page, you can add, adjust, or delete currencies.

Adding currencies

You must be a system administrator to add currencies in the system.

1. Click **System setup > Currencies > Add currency**.
2. In the dialog that is displayed, type a unique name for the currency in the **Name** box.
3. Type the corresponding exchange rate in the **Exchange rate** box.
4. Click **OK**.

Adjusting currencies

You must be a system administrator to adjust currencies in the system.

1. Click **System setup > Currencies**.
2. Click the currency that you want to adjust the exchange rate for.
3. In the dialog that is displayed, type the new exchange rate in the **Exchange rate** box.
4. Click **OK**.

Users of connected applications

On this page, you can assign aliases for users of connected applications.

1. Click **System setup > Users of connected applications**.
2. If not already selected, select **Use an alias for users of connected applications so that REPORTER will not display their actual login name**.
3. Click **Assign Alias**.
4. In the dialog that is displayed, type the name of the connected application user.
5. Type a new alias, or select an existing alias from the dropdown list.
6. Click **OK**.

System overview

The **System overview** menu is visible only to system administrators. Here you can monitor REPORTER's user and system activity.

The **User activity** page displays an overview of recent user activity. If you want more detailed information, click **System activity**.



My setup

The **My setup** menu lets you change your own user settings.

Adjusting your settings

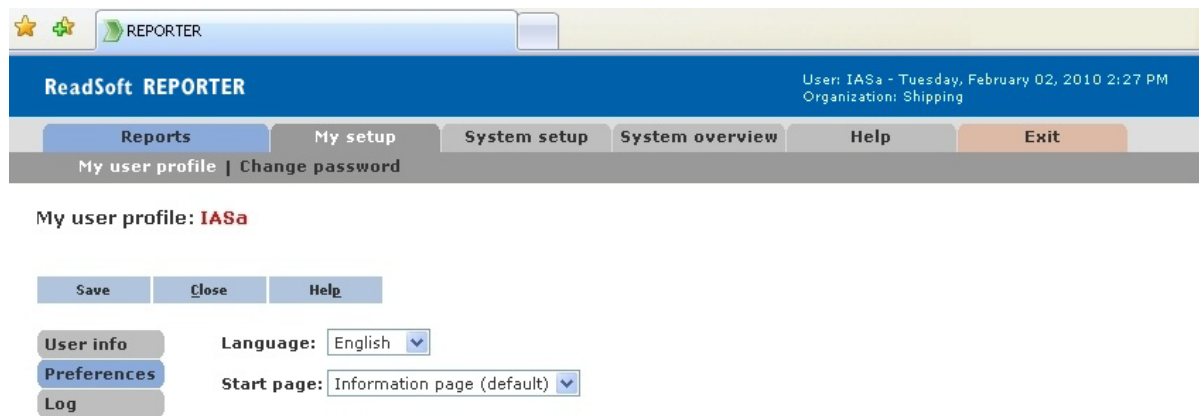
Changing your password

1. Click **My setup > Change password**.
2. Type the current password in the first box. (If you do not know the current password, your system administrator can change your password for you.)
3. Type the new password twice.
4. Click **OK**.

Changing your start page

When you start REPORTER, the first thing you see is either the **Information** page, where you can read system information or messages from your administrator, or **Reports**. To choose your start page:

1. Click **My setup > My user profile**.



The screenshot shows the ReadSoft REPORTER user interface. At the top, there is a navigation bar with the text "ReadSoft REPORTER" on the left and "User: IASa - Tuesday, February 02, 2010 2:27 PM Organization: Shipping" on the right. Below this is a menu bar with options: "Reports", "My setup", "System setup", "System overview", "Help", and "Exit". Under "My setup", there are sub-options: "My user profile" and "Change password". The main content area displays "My user profile: IASa". Below this, there are three buttons: "Save", "Close", and "Help". There are also two dropdown menus: "Language:" set to "English" and "Start page:" set to "Information page (default)". On the left side of the settings area, there are four buttons: "User info", "Preferences", and "Log".

2. Select your choice in the **Start page** box.
3. Click **Close**.



Help

The **Help** menu gives you access to *REPORTER Help*, **Start page**, and the **About REPORTER** page.

REPORTER contains two help systems:

- *REPORTER Help* – for information on using REPORTER with your ReadSoft system. You can access *REPORTER Help* from the **Help** menu or any of the **Help** buttons in REPORTER.
- *QlikView Help* – for information about using QlikView, a third-party tool used for displaying reports. To access *QlikView Help*, press **F1** when viewing a report.

REPORTER configuration

REPORTER comes with a separate configuration tool for configuring various database and system settings. The configuration tool should only be used by qualified personnel, such as a ReadSoft Professional Services representative.

To start the configuration tool, go to the server where REPORTER is installed and select **Start > All Programs > ReadSoft > REPORTER > Configuration > REPORTER Configuration**.

For help during the configuration process, *REPORTER Configuration Help* is available on the server where REPORTER is installed. Press **F1** while using the configuration tool, or select **Start > All Programs > ReadSoft > REPORTER > Configuration > REPORTER Configuration Help**.

