

MoversSuite

User Guide

User Guide to Reports

Setting up, understanding, and using MoversSuite Reports

User Guide to Reports

Version 3.8 (Spring 2009)

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Reports



Click icon to view the Standard Report Listing in Adobe Portable Document Image (PDF) format.



Click icon to open this entire document in Adobe Portable Document Image (PDF) format.

MoversSuite has taken great effort to work with its customers to develop documents that are useful to all users. Customizable invoices, dispatch work tickets, sales summaries, and many, many more reports and other documents that range from the simple, such as printable hauling labels, to the complex, such as accounting reporting tools, are available.

In addition to these easily accessible documents provided by MoversSuite, MoversSuite can accommodate a client's own list of custom documents, providing a complete reporting environment.

Reporting with MoversSuite

Documents, forms, letters, reports, invoices, and other similar forms of output are referred to as **Reports** within MoversSuite. This is due to MoversSuite's seamless integration with the robust Microsoft SQL Server Reporting Services reporting tools.

Although Reporting Services is the primary document rendering tool, the application is versatile enough to work with many other tools, including Crystal Reports and Microsoft Word documents.

The use of bookmarked fields, that map MoversSuite data to a Microsoft Word document, will continue to be a developed resource, adding to the ever increasing list of reporting options.

Set up and maintenance of these files is accomplished through the Reports setup within the Mover's Suite Administration. Additionally, access to the documents is controlled through assigning personnel a Report Profile through this tool, as well.

Once a user has been assigned a profile, they will be able to access the documents established for their Report Profile in a variety of ways: From the application's menu bar, from buttons placed throughout the application, and through Reporting Services, directly.

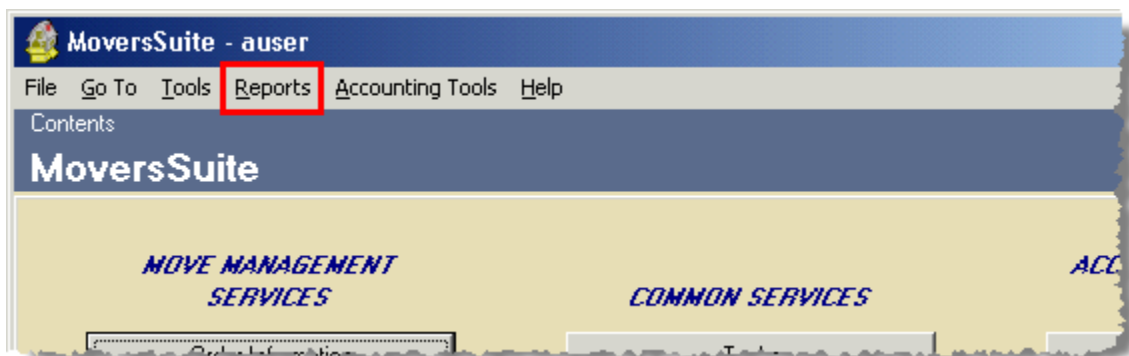


Figure 1: Reports menu options

The reports listed in the Reports drop-down menu are all those assigned to the particular person logged into MoversSuite (as assigned through their Report Profile).

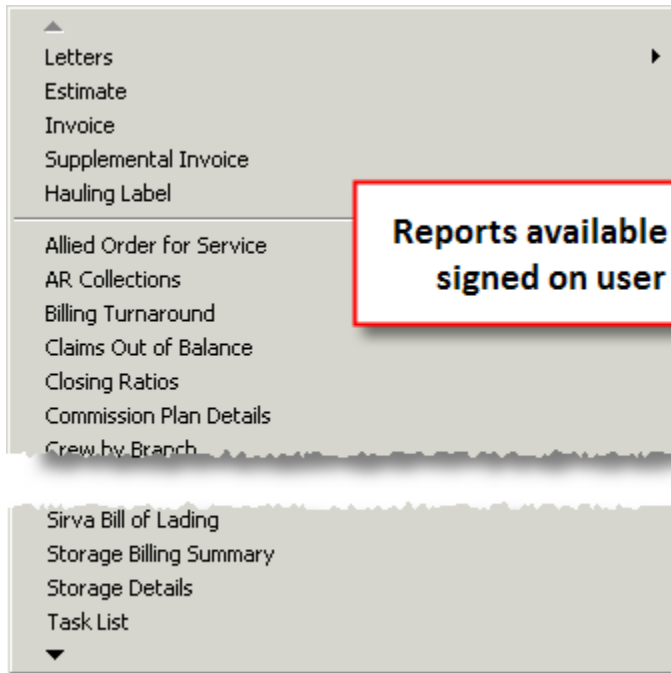


Figure 2: Reports menu

Selecting a report from the menu will invoke the Report Viewer window to display the contents of the report.

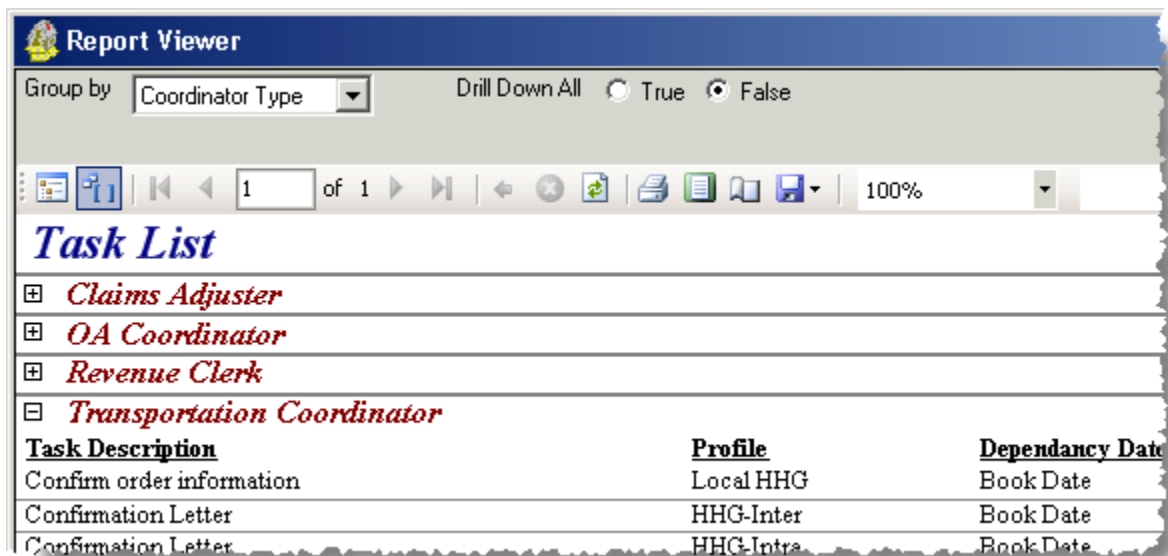


Figure 3: Task List report

Standard Reports Provided by MoversSuite

An extensive list of quality documents is provided as a standard part of the MoversSuite Software package. Most of these documents are designed, generated, and viewed through Microsoft SQL Server Reporting Services, except where indicated, and are categorized into the following areas:

- Accounting and Financial Services Documents
- Common Services Documents
- Move Management Services Documents
- Move Management Services Forms
- Reporting Tools

Items not included in this description are those that have been modified for, or by, a customer. Contact your system administrator, or your MoversSuite Professional Services contact, for more information on custom or modified reports. Refer to the [Standard Report and Document Listing](#) section for more information.

Using Report Documents

Once the documents and profiles have been established, a user can launch and view the reports assigned to them in one of the following ways:

- Reports menu option, available from the application's main toolbar,
- Letters menu option, available from the application's main toolbar by Reports > Letters,
- Buttons available throughout the MoversSuite application,
- Accessing the report service directly through the Report Manager (Microsoft SQL Server Reporting Services).

Report Menu Option

Reports defined in Reports Setup will be available through the Reports menu option. This is available through the application's main toolbar by selecting Reports.

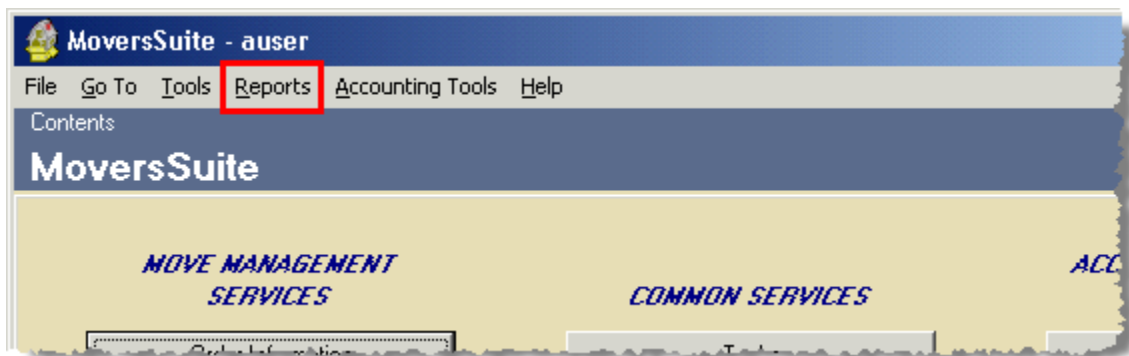


Figure 4: Accessing Reports from the main toolbar

Pressing the Reports button will open up a report listing, which includes two sections: An upper section that produces system-generated documents that require specific data that the application passes to the document generator; and a lower section that contains all general purpose reports, documents, and forms.

The upper section includes a link to a separate listing of documents defined with a Report Type of "Letters."

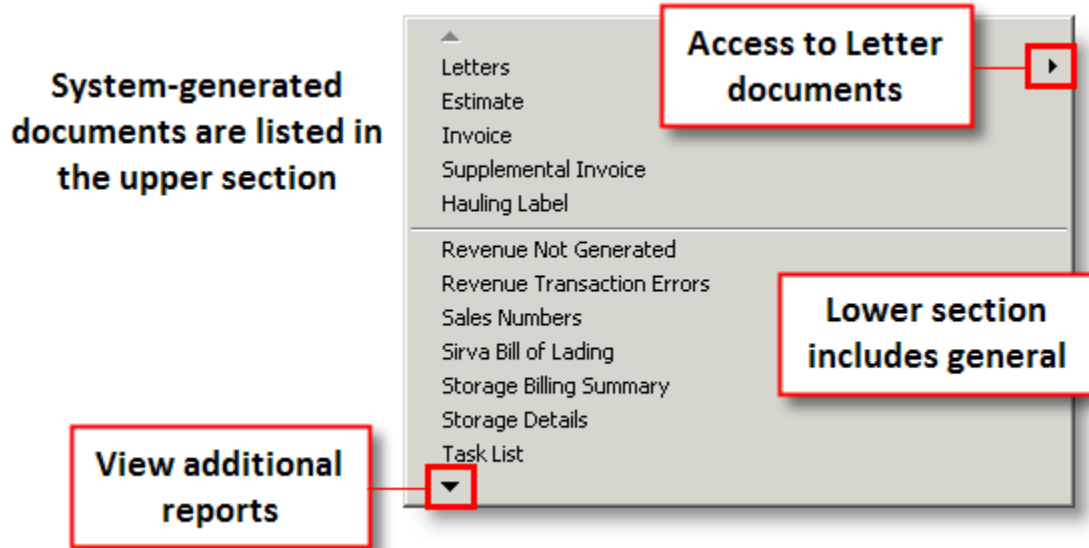


Figure 5: Reports menu

System-generated documents (all those in the upper section, including Letters) may require that a record be opened within MoversSuite otherwise the report generator may return an error.

Selecting a document defined with a Report Type of “Letters” will cause the program to open a Microsoft Word window to display the generated content.

Otherwise, the application will open a **Report Viewer**, displaying the contents of any Reporting Services and Crystal Reports documents. Often the report will generate the output automatically, but the user has the option to reset the parameters and can re-run the report using the **View Report** button.

Report Viewer

The most prevalent report-generation tool is the Report Viewer. This application is included with the Microsoft SQL Server Reporting Services suite and is used by MoversSuite to process Reporting Services Reports and Crystal Reports documents. **Note:** Some Crystal Reports documents will not work with Reporting Services and may need to be generated through a Crystal Reports server.

The functional components of the Report Viewer are listed below.

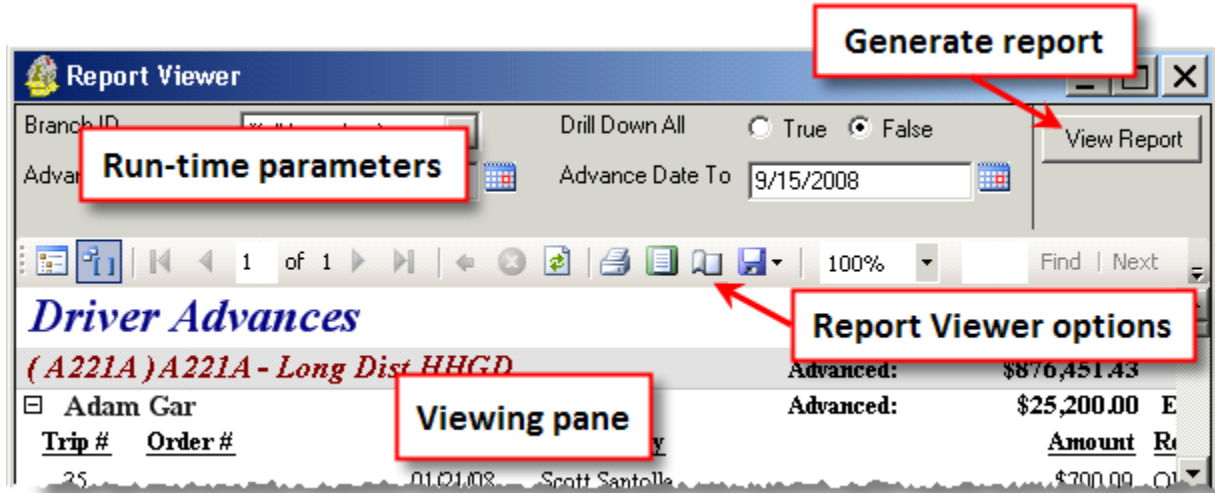


Figure 6: Report heading section

Report Viewer Options

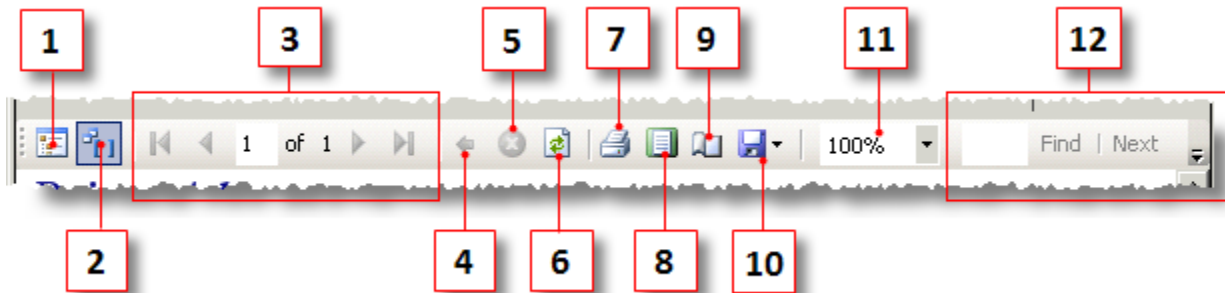
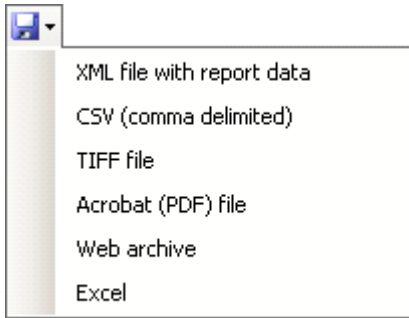
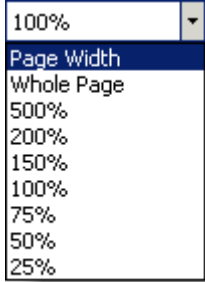
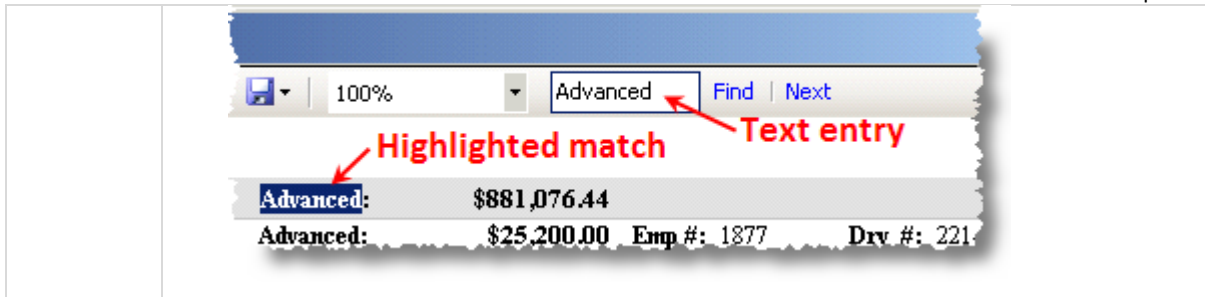


Figure 7: Report Viewer options

Report Viewer options are detailed in the following table.

Image Ref.	Description
1	Show or Hide Document Map The document map allows a user to jump to other referenced locations within the report such as breaks and individual records.
2	Show or Hide Parameter Area This option allows the user to show or hide the parameter entry area.
3	Page Navigation User can choose to navigate to the first, previous, next, or last page or choose to enter a page number to jump to in the report.
4	Back to Parent Report This option will take the user to the parent report if the reports are built in a hierarchy and linked together. Note: This option is disabled for most Mover's s Suite reports.

5	<p>Cancel Report</p> <p>If the report is being rendered, then the user can choose to cancel the report generation process.</p>
6	<p>Refresh Report</p> <p>This is the same as the View Report option which regenerates the report.</p>
7	<p>Print Report</p> <p>Opens a Print dialog where a user can send the contents of the report to a printer.</p>
8	<p>Printer Layout</p> <p>This option will display the report as it will be rendered by the printer.</p>
9	<p>Page Setup</p> <p>Opens the Page Setup dialog where a user can change the report size, orientation, margins, and other print and page functions.</p>
10	<p>Save Report</p> <p>A user can select from several options to save the output of the report in a physical form.</p> 
11	<p>Zoom Display</p> <p>A user can change the size of the report by choosing from a list of zoom options.</p> 
12	<p>Report Search</p> <p>A user can enter a description in the blank text box and press Find to search the contents of the opened reports. Search hits will be highlighted and the user can toggle back and forth between the matches using the Find and Next buttons.</p>



A user can quickly become accustomed to using the various report options and a user will know when the Report Viewer is generated by a “Report is being generated” indicated (Figure 8).

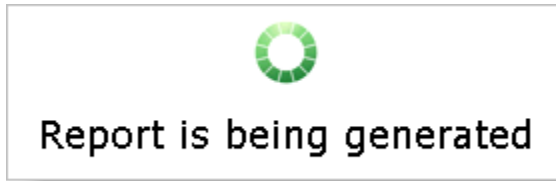


Figure 8: Report generation symbol

If this indicator is not present, then a user should attempt to regenerate the report by pressing the View Report button. A user will always need to press this button after report parameters have changed.

The output of each report will either be in landscape or portrait layout, depending on the need of the report. While the Report Viewer window can be adjusted, the layout cannot be altered without special report customization.

Letters Menu Option

All documents defined with a Report Type of “Letters” and are not assigned to a button (through the System ID setting) will appear within the **Letters** sub-menu.

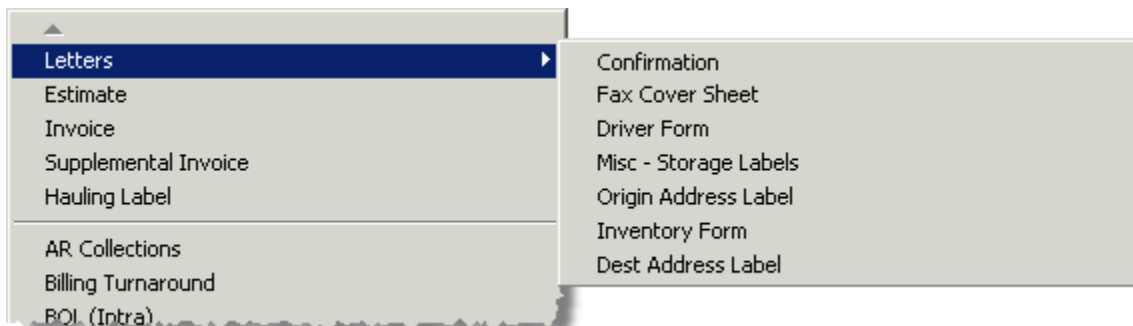


Figure 9: Letter document listing

All Letters documents will be generated and viewed through a **Microsoft Word** document viewer. Bookmark files are the most common type of Letter document and they provides an easy way for a user to define and produce custom forms, letters, etc. Refer to the [Bookmarks](#) subject for more information.

Accessing Documents through Buttons

In addition to the **Reports > Letters** menu options available from the application's menu bar, a user can also access documents by various buttons found throughout the application.

The System ID setting within the Reports setup controls which documents are referenced through a specific button. For example, the document that references the Report table System ID setting of **OLAB** will appear when the **Print Label** button is pushed from within the **Name, Address, Phone** tab.

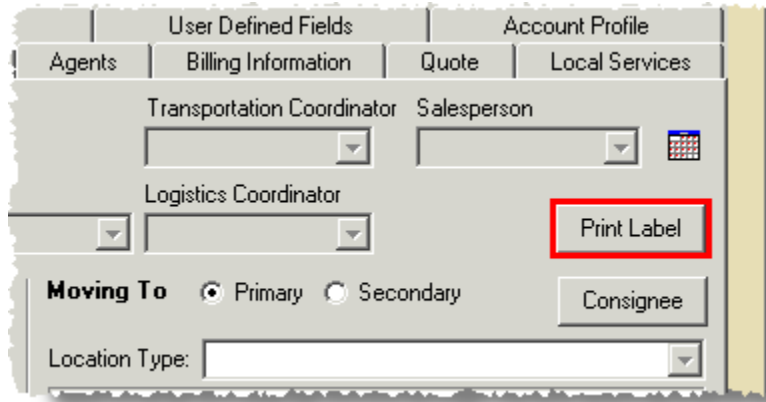


Figure 10: Print Label button available through the Name, Address, Phone tab

Refer to the [System ID Setting](#) section for a complete listing of available buttons and understanding of its setup.

Accessing Reports through a Reporting Server

Reports can also be viewed directly through the Microsoft SQL Server Reporting Services, by means of the **Report Manager** application. This application is accessible through a web browser, such as Microsoft Internet Explorer 7. Contact an Information Technology (IT) expert for more information for the specifics of accessing the Report Manager.

When the Report Manager is successfully loaded into a web browser window, a user may have access to running and viewing all reports loaded into the service. The security that controls file access in MoversSuite is not present here.

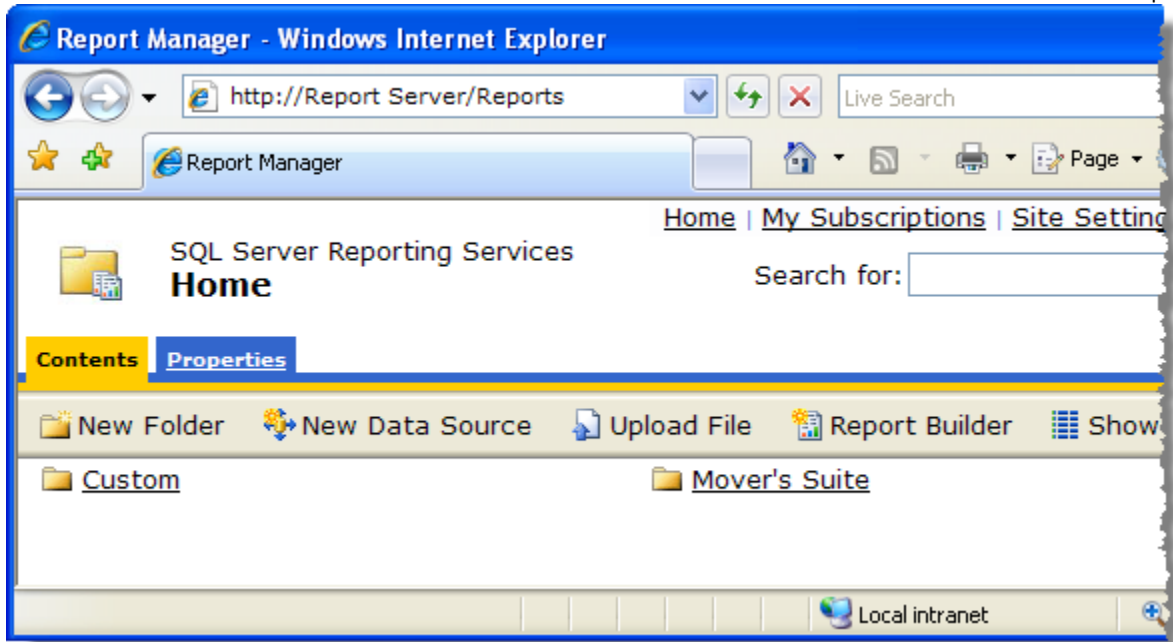


Figure 11: Report Manager as viewed within a web browser

Selecting a folder will list its contents within the same window.

When all the standard Reporting Services reports from MoversSuite are loaded into a single-folder, then a user would see the following folder structure.

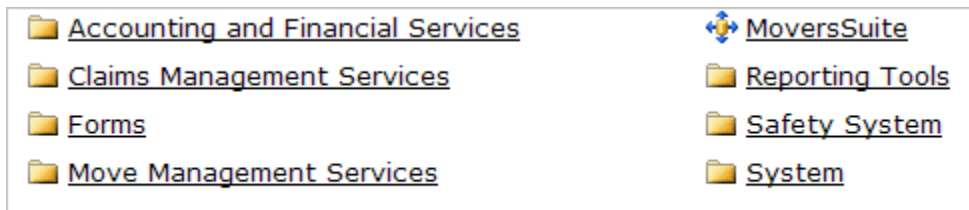


Figure 12: List of standard MoversSuite report directories

Selecting one of the listed categories will display its contents to the same screen. Eventually, a user will be able to see the list of available reports, along with a description of what they report.

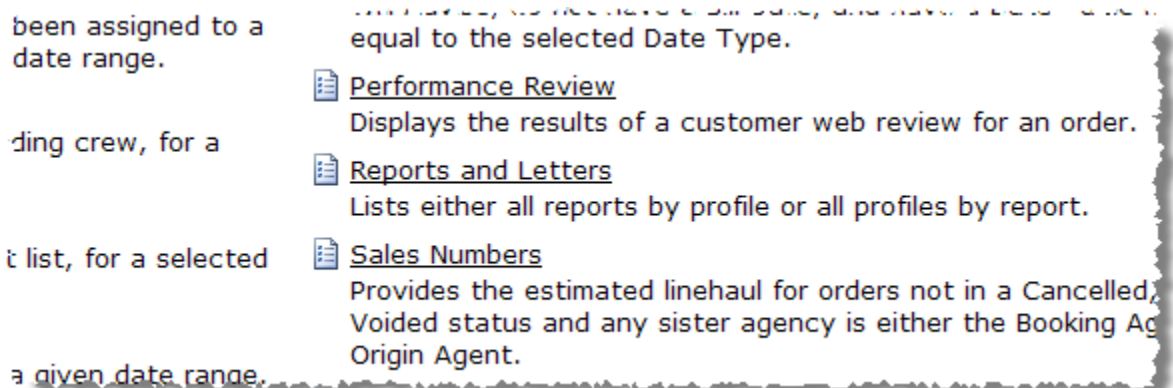


Figure 13: Reports and their descriptions

Note: All reports available within the Report Manager are also available to the MoversSuite application. Reports listed within the Report Manager can be linked to MoversSuite through the Reports setup by a **Render Type** setting of **Reporting Services Report**.

Selecting one of the reports within the Report Manager will cause the **Report Viewer** to be launched. The output will be generated and displayed in the same window as that of the listing.

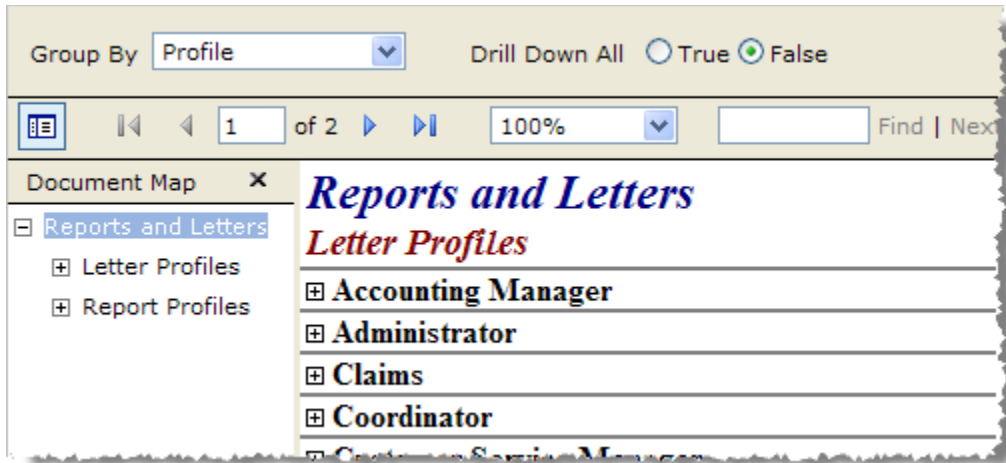


Figure 14: Report accessed directly through the Reporting Services Report Viewer

Tip: Use the Report Manager’s search utility to locate existing files by their Name, including report and image files. The search utility is located in the upper right-hand corner of the Report Manager window.

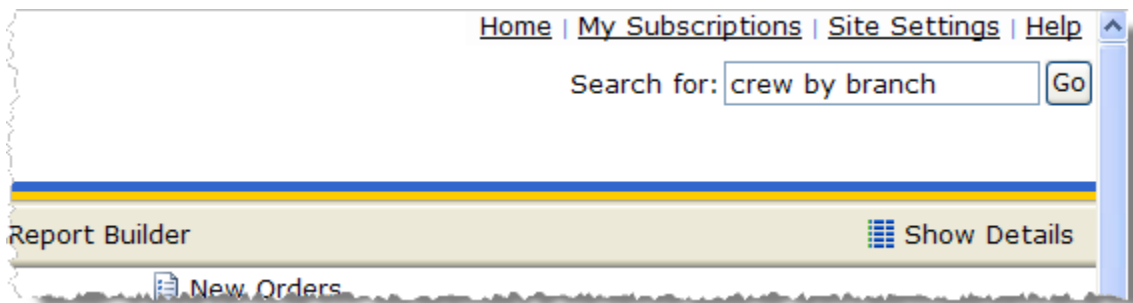


Figure 15: Report Manager search feature

Uploading to the Reporting Services Server

The Report Manager can be used to add custom Reporting Services reports or to update existing ones. The process below describes how the Report Manager can be used to upload a report file in a report server.

Important: The files must be defined as a **Report Definition Language (RDL)**, aka *Report Definition File*, file in order to be uploaded into Reporting Services. Special procedure files and related database changes that may need to accompany the file must also be in place prior to executing the report.

Uploading Reporting Service Reports using Report Manager

1. **Open** a web browser, such as Microsoft Internet Explorer, from a computer that has sufficient privileges to access the company's report server,
2. Enter the URL that opens the Microsoft SQL Server Reporting Services **Report Manager** application hosted on the company's report server. Typically, the URL format is **http://report server/Reports\$instance/**, where the *red italicized* settings are specific to a user's system,

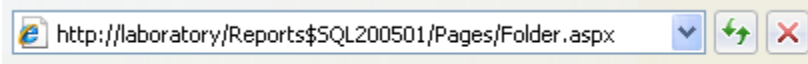


Figure 16: Sample URL to access Report Manager

The SQL Server Reporting Services screen will appear,

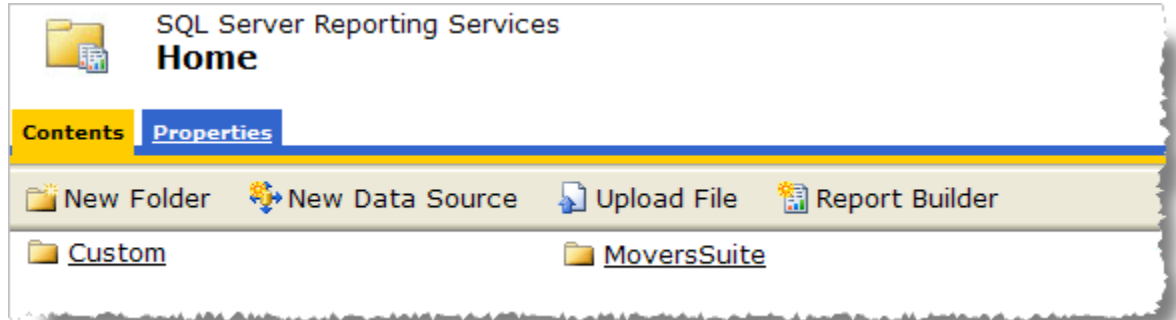



Figure 17: Report Manager screen

3. **Open** and **access** the folder in which the uploaded report will reside. **Note:** The **New Folder** option can be used to create a separate locale for reports,
4. Click on **Upload File** () and the Upload File screen will appear,

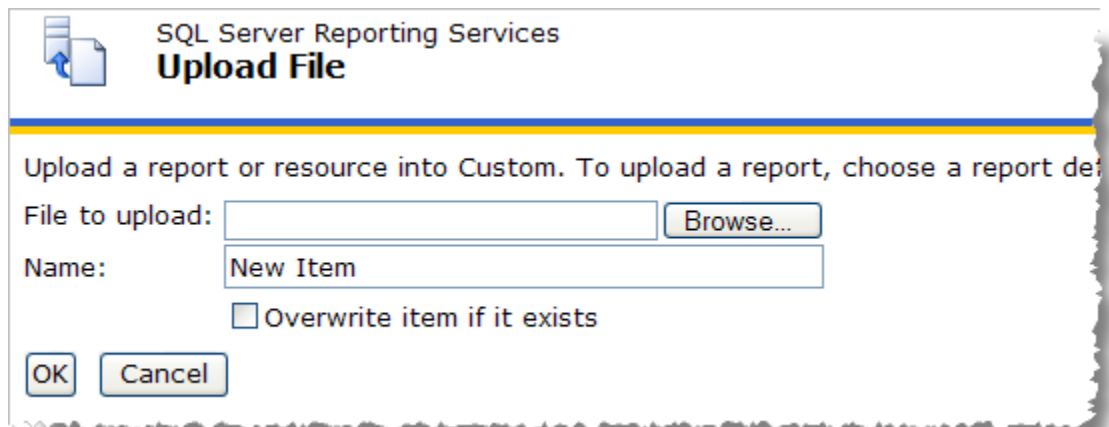


Figure 18: Upload File screen

5. Press **Browse** to locate the RDL file using the Choose File utility,

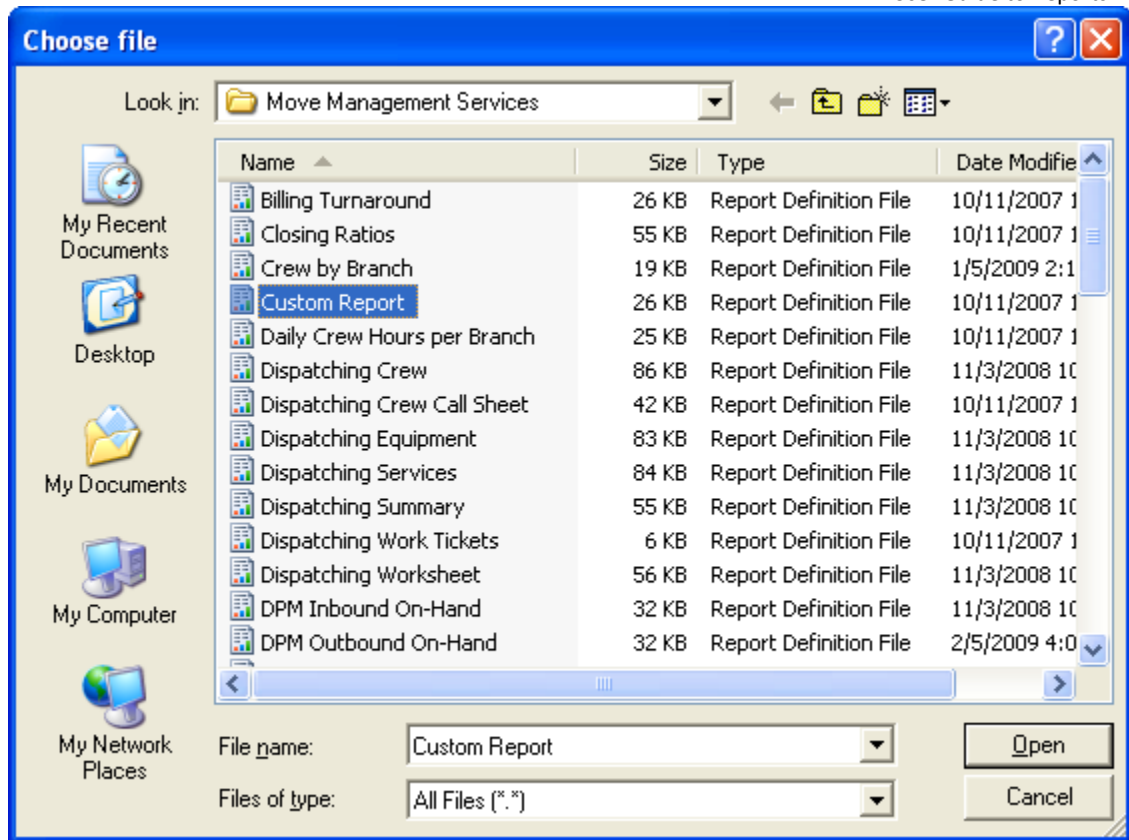


Figure 19: Choose File window

6. Select the correct report and press **Open** and the file name will be painted in the **File to upload** field,

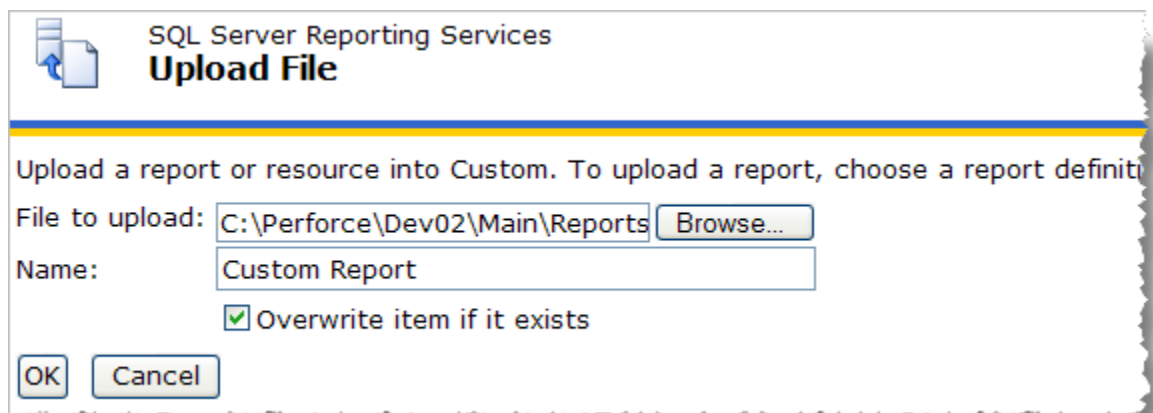


Figure 20: Report Manager Upload File screen

7. Select the **Overwrite item if it exists**. This option instructs the application to replace an existing version of the report existing in the report server,

Important: If this option is not selected and the report already exists on the server then the new file will not be uploaded.

8. Press **OK** and the report will be inserted into the open folder. Reports inserted into the report server since the last server update will be flagged with a **!NEW** flag,

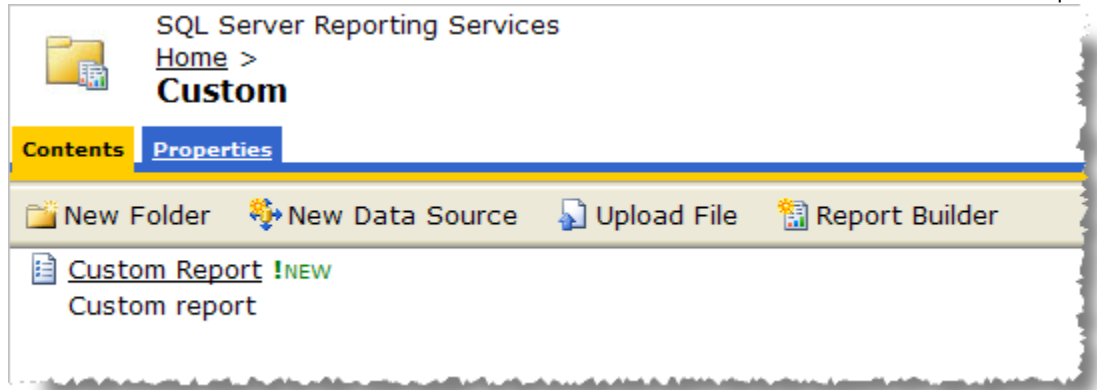


Figure 21: New report sample

Verify the report properties:

- Click on **Show Details** and the screen will display the Edit options,

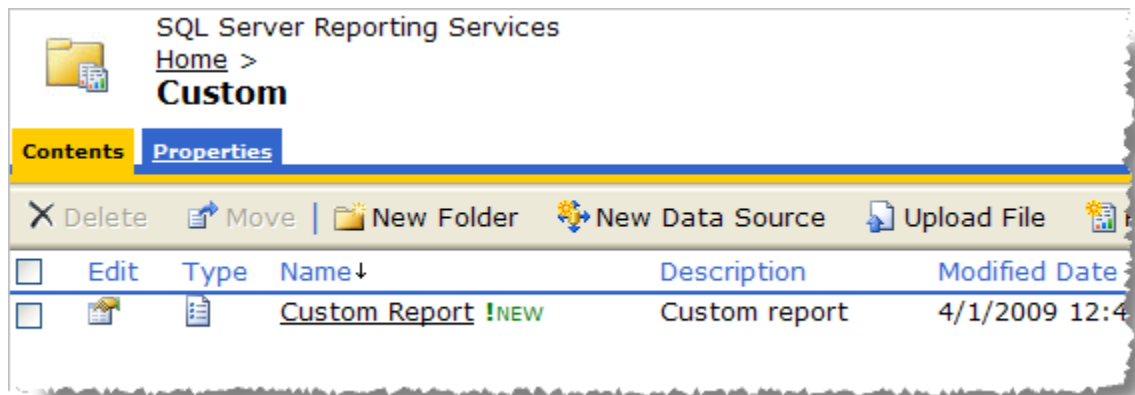


Figure 22: Show Details

Tip: Using the **Show Details** option will enable the Delete and Move options.

- Press **Edit** () to access the report Properties,

Make adjustments within the **General**, **Parameters**, **Data Sources** settings as needed.

Important: Press **Apply** on each screen to ensure that the changes are committed.

Often a new report will need to have the data source updated in order to view the report. A report with an invalid data source will return the following error when viewed: “The report server cannot process the report. The data source connection information has been deleted. (rsInvalidDataSourceReference)”

Update a data source:

- Open the **Properties** tab,
- Select **Data Sources** option,

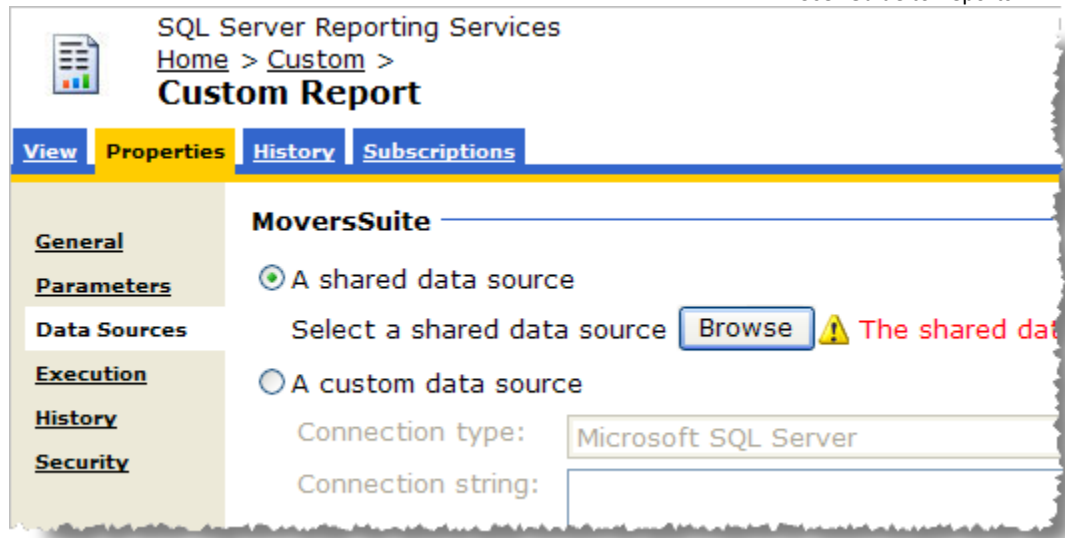


Figure 23: Data Sources > A shared data source setting

- c. Check the **A shared data source** option,
- d. Press **Browse** and the screen will list the directory of the report server,

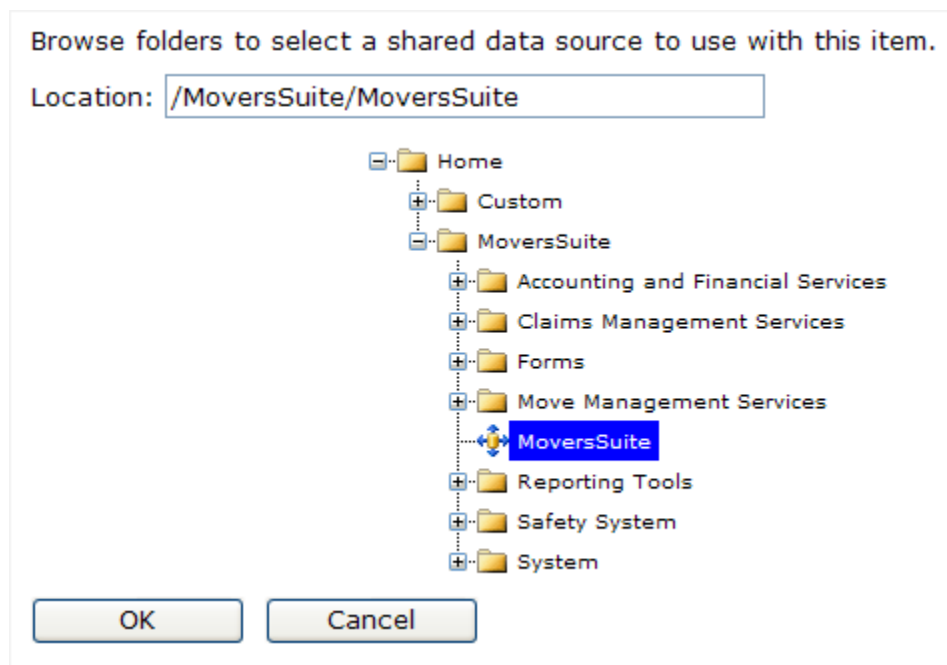



Figure 24: Data source selection

- e. **Select** the appropriate data source (denoted by ) ,
- f. Press **OK** and the selected data source will appear as the shared data source,

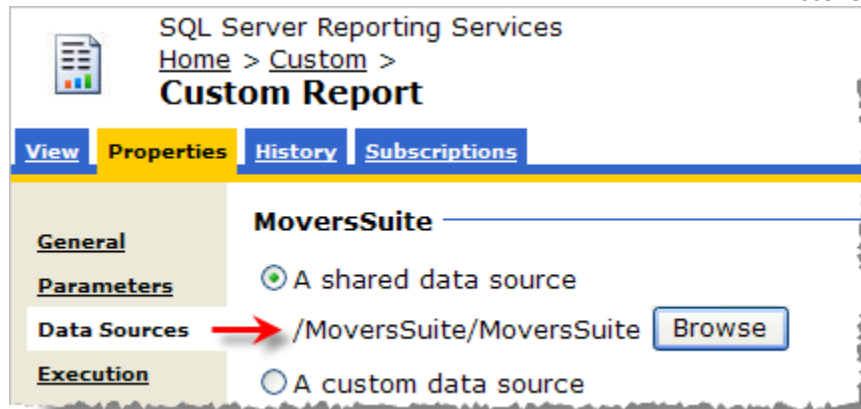


Figure 25: Specified data source

- g. Press **Apply** (bottom of screen) to commit the changes. The report will now reference this data source when executed.
11. Click on the **View** tab to execute the report and view its output.

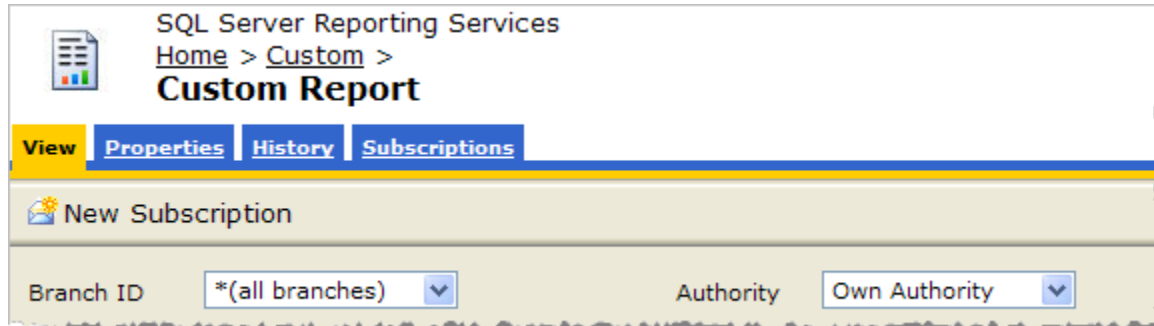


Figure 26: View tab

Reports loaded into the report server will be accessible to MoversSuite. Refer to the [Report Setup and Administration](#) section to understand how to link a Reporting Services report to a MoversSuite menu item.

Report Setup and Administration

Report documents are any files that can be generated from within the MoversSuite application. They include reports, forms, invoices, letters, quotes, etc. The output of these documents can be rendered through one of the three, supported document generation applications:

- Crystal Reports
- Microsoft Word
- Microsoft SQL Server Reporting Services

A moving company can define their own set of document to work with these applications or use those provided by MoversSuite. To view the list of standard MoversSuite reports access the [Standard Report and Document Listing](#) section.

This topic informs an user on how to set up documents to work within MoversSuite and how a user can be set up to generate these documents.

Reports Setup

The way in which MoversSuite identifies documents available to be rendered, and how they are to be generated, is accomplished through the **Reports** setup within the **Mover's Suite Administration**. Use this tool to identify, update, and add to the list of reports that can be generated through MoversSuite.

Administrative setup of Reports involves the following areas:

- Report Type Settings
- Report Name Settings
- Report Path Settings
- System ID Settings
- Render Type Settings

The following procedure can be used to generically identify which documents are available to users through the MoversSuite application. One can follow this procedure to add documents, modify existing ones, or isolate problems.

Adding a Reports document

1. Access the **Mover's Suite Administration**,
2. Open the **Common > Reports > Reports** setup,

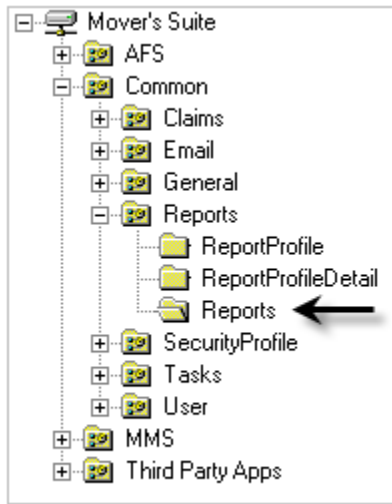


Figure 27: Reports setup section

3. **Click** the mouse in the row describing “Click here to add a new row”,
4. Enter a **Menu Name**. This is the name that appears for the document within the Reports menu of MoversSuite application,
5. Enter a **Report Name**. This is name of the physical file as it exists within the application server or the name recognized by Reporting Services. See the [Report Name Setting](#) section for details,
6. Enter **Report Path**. This is the path (directory) that is a prefix of the Report Name. See the [Report Path Setting](#) section for details,
7. Select a **Report Type**. This setting determines which application is to be used to process the document. See [Report Type Setting](#) section for details,
8. Optionally enter a **System ID** to have the document available through a button. See the System ID Setting section for details,
9. Optionally select a **Render Type**. This value instructs the program as to which file extension to use when saving the output of the document, when generated through a batch process. See the [Report Type Setting](#) section for details,
10. Press the **Tab** key to add the record to the database,
11. **Repeat** Steps 3 through 10 to define other documents.

Once successfully defined, the Reports documents can be associated to a report profile (a grouping of reports that can be assigned to personnel) as described within the [Allowing Access to Reports Documents](#) section.

Refer to the [Custom Report Document Setup](#) section for specifics on custom reports settings.


The [Sample Reports Settings](#) section contains several examples of the Reports setup.

Quick Reference to Reports Settings

A quick reference to the Reports settings is listed in the table below.

Refer to this section when making changes to the Reports table from within the Mover's Suite Administration.

Field Name	Description
Menu Name (required)	<p>The name that appears for the document within the MoversSuite application.</p> <p>Example: "Confirmation Letter"</p>
Report Name (required)	<p>The name of the physical file as it exists on one's system, or the name recognized by Reporting Services document. This option is dependent on what is set for the Report Type.</p> <p>For documents that have a Report Type of Letters, then this must be a Microsoft Word document with the filename extension of either doc or docx (Microsoft Word 2007).</p> <p>Example: "Confirmation.docx"</p> <p>For documents defined with a Report Type of Crystal Reports, the file referenced must have been created using the Crystal Reports application and have a file extension of rpt.</p> <p>Example: "Printer_Alignment_Form.rpt"</p> <p>Reporting Services Reports documents must be referenced by their file name and the directory structure as they exist on the server.</p> <p>Example: "[Account]/Move Management Services/Task List"</p> <p>This is where [Account] represents the top-level directory within the Reporting Services Report Manager and may indicate a specific release of MoversSuite.</p> <p>For custom Reporting Services Reports, a user may want to create a Custom folder at the highest level within the Report Manager. See the Custom Report Document Setup section for more information on custom reports.</p>
Report Path (required)	<p>This is the path (directory) that is a <u>prefix</u> to the Report Name. As with the Report Name, this option is dependent upon the Report Type setting.</p> <p>For documents that have a Report Type of Letters and Crystal Reports, this will be the location within the server that contains the files.</p> <p>Example: "\\[Server Name]\mssShare\mssLetters\Crystal Reports\"</p> <p>This is where [Server Name] represents the name of the server that hosts MoversSuite.</p> <p>For Reporting Services Reports documents, this would be the URL that references the report server and the Reporting Services web service.</p> <p>Example: "http://[Server Name]/ReportServer"</p> <p>This is where [Server Name] represents the name of the report server.</p> <p>See the Custom Report Document Setup section for more information on custom reports.</p>
Report Type (required)	<p>The Report Type instructs the program on how the file should be generated.</p> <p>Options:</p> <ul style="list-style-type: none"> Crystal Report, Letter, Reporting Services Report.

System ID (optional)	<p>In general, the System ID is a four-character identifier that allows the document to be launched from a button within the MoversSuite application.</p> <p>For example, assigning a System ID of “CLAM” will allow for the document to be made available through the Report/Letters button from within the Claims interface.</p> <div style="text-align: center;">  </div> <p>See the Accessing Documents through Buttons section for further details on each of these codes.</p>
Render Type (optional)	<p>This setting determines how the file should be saved, when generated through a batch process.</p> <p>Options:</p> <p>PDF (adds “.pdf” to filename)</p> <p>EXCEL (adds “.xls” to filename)</p>

Report Type Setting

The **Report Type** option defines which method MoversSuite will use in generating output from the document. There are currently three options available:

Valid Report Type	Description
Crystal Report	The file will be generated using Crystal Reports.
Letter	The file will be generated using Microsoft Word.
Reporting Services Report	The file will be generated using Microsoft SQL Server Reporting Services.

This option affects what is entered for the **Report Name** and **Report Path** options.

Report Name Setting

The **Report Name** is the name of the physical file as it exists on one’s system. It can also be the name of the document uploaded into a Reporting Services server.

This option is dependent on what is set for the **Report Type**.

The table below attempts to illustrate the appropriate Report Name values that should be set depending on what the **Report Type** is set to.

Report Type is Set to:	What is expected for Report Name values:
Crystal Report	The file will be generated through Crystal Reports and must have a file extension of rpt .

	Example: Printer_Alignment_Form.rpt
Letter	The file will be generated through Microsoft Word and should have a file extension of either doc or docx (Microsoft Word 2007). Example: Confirmation.docx
Reporting Services Report	The file will be generated through Microsoft SQL Server Reporting Services. No file extension is needed, but the name specified must match that of what has been loaded, or saved, within Reporting Services. Example: /[Account]/Move Management Services/Task List <i>This is where [Account] represents the top-level directory within the Reporting Services Report Manager and may indicate a specific release of MoversSuite.</i>

For custom Reporting Services Reports, a user may want to create a **Custom** folder at the highest level within the Report Manager. See the [Custom Report Document Setup](#) section for more information on custom reports.

Report Path Setting

This is the path, or directory location, that is a prefix to the **Report Name**.

This option is dependent on what is set for the **Report Type**.

The table below attempts to illustrate the appropriate Report Path values that should be set depending on what the **Report Type** is set to.

Report Type is Set to:	What is expected for Report Name values:
Crystal Report or Letter	For these documents, the Report Path will need to reference the physical location of the file within the application server. Examples: \\[Server Name]\mssShare\mssLetters\Crystal Reports\ \\[Server Name]\mssShare\mssLetters\Custom\ <i>This is where [Server Name] represents the name of the server that hosts MoversSuite.</i> See the Custom Report Document Setup section for more information on modifying this setting for custom reports.
Reporting Services Report	For Reporting Services Reports, this must be the URL that points to the report server that hosts the Reporting Services. Example: http://[Server Name]/ReportServer <i>This is where [Server Name] represents the name of the report server.</i>

The Report Path is used in conjunction with the Report Name to produce a complete mapping to the location of the source of the document. If, for example, the document is a Reporting Services Report document, then a possible complete reference would be as follows:

<http://Server/ReportServer/MoversSuite/Move Management/Task List>

System ID Setting

The **System ID** is a four-character identifier that, when set for a document in the Reports setup, will allow the document to be available through a button within MoversSuite. An example of this is the **Print Label** button available through the **Name, Address, Phone** tab.

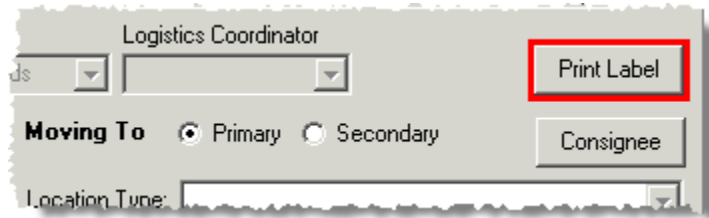


Figure 28: Print Label button on the Name, Address, Phone tab

When the application renders a document through a button, it passes record-specific data to a third-party application such as Microsoft Reporting Services or Microsoft Word (Letters) and displays the content of the filled-in document in a separate window.

In addition to allowing a document to be rendered through a button, the System ID values also instruct the application to send data regarding a specific record to the output generation application (e.g. Microsoft SQL Reporting Services). The document being rendered must be able to accept this data. If it cannot, then the user will receive an error.

Administrators must be aware of what is required by the document from the requesting application in order for the process to work correctly. For example, the use of the **HLAB** value (for the Print Label button) will require that the **Order ID** be present (a valid Order Number) and the standard label document will call on **Reporting Services** to generate the output. By assigning the HLAB value to a document, MoversSuite will attempt to pass the Order ID to the Reporting Services. If the document does not accept the Order ID as an argument, then the user will receive a Reporting Services error. Likewise, if a document is assigned the HLAB value then it must be setup to take in the Order ID.

Available System ID Values

Use the following table to identify what System ID values can be referenced, including which button(s) it represents along with the standard document supplied by MoversSuite.

Notes:

- A System ID value can only be referenced once in the Reports table settings, except for CLAM, INTL, MILT, and QUOT which can be referenced by more than one report document (indicated a **red** in the table below). Refer to the [Multiple Document Settings](#) section.

- The System ID setting instructs the application to pass information about the record being accessed to a particular document. If the information being passed to the document is not correct, the user will receive an error. In general, reports that reference more than one record will cause an error if rendered through a button.

System ID	Button(s) Text	Location within Application	Standard Default Report Name
CASH	Print Receipt	Cash Receipts > Cash Receipts	Payment Receipt
CLAM	Reports/Letters	Claims	Not available.
CSMR	Create New Statement	Accounting Tools > Commission Statement Management	Commission Statement
GLES	VL Distributions	Accounting Tools > Payment Management	Payment Management Vanline Distributions
HLAB	Hauling Label	Reports > Hauling Label	Hauling Label
INTL	Forms	Shipping Information	Not available.
MILT	Military Form	Military/Government	Gov DD1840 Gov DD1840 Delivery Out Gov DD619 Gov DD619-1
OLAB	Print Label	Name, Address, Phone	Standard Label
PBER	Generate Transactions	Accounting Tools > Payment Management > Detail Processing	Payment Management Transaction Errors
PDEP	Deposit Report	Accounting Tools > Payment Management > Batch Management	Deposit Statement
QUOT	Generate Quote	Quote	Quote
REVI	New Complete New Supplemental	Revenue Entry > Summary Tab > Invoice Claims > Summary Tab > Invoice	Standard Invoice (long)
RSBI	View Invoices	Accounting Tools > Recurring Billing Management	Standard Invoice (short)
SSTR	Supplemental Invoice	Reports > Supplemental Invoice	Special Services Invoice by Store
STRK	Invoice	Reports > Invoice	Special Services Invoice by Order
	<p>Note on SSTR and STRK: If the task group associated to the order has the Invoice By counter set to a non-zero value then the STRK document will be rendered for the Reports > Invoice option, otherwise if the Invoice By counter is zero then the report referencing SSTR will be rendered. Refer to the</p>		

	System ID Setting for Special Services Invoices for more information.		
STMT	Generate	Accounting Tools > Customer Statement Generation	Customer Statement
WORK	Work Ticket	Local Dispatch > Dispatch Center	Work Ticket

Multiple Document Settings

Several System ID values can be referenced by multiple documents within the Reports table setup, they include the following:

CLAM
INTL
MILT
QUOT
REVI
RSBI

Each of these System IDs represents a button with a drop-down menu option. This feature allows a user access to an unlimited number of documents. The System ID of CLAM, for example, will allow the report to be accessed through the **Reports/Letters** menu within the Claims interface.

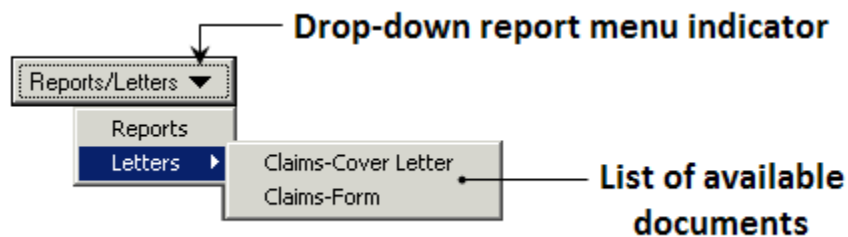


Figure 29: Reports/Letters within Claims

Render Type Setting

A user can define how output of the generated document is to be saved by setting the **Render Type** within the Reports setup of the **Mover's Suite Administration**. This setting only applies to documents generated in batch or as part of an internal function, such as archiving invoices and quotes.

For example, when the monthly recurring billing and storage process produces invoices, it can be instructed to save the output as an Adobe Portable Document Form (PDF). In such a case, it would be tedious to require a user to manually set the output type.

These same options are available to Reporting Services Report files that are interactively generated by a user from within either the MoversSuite application or through the Report Manager. Refer to [Accessing Reports through a Reporting Server](#) section for more information.

Listed below are the available Render Types and the extension used to save the file with.

Render Type Descriptions

Code	Description	File Extension
PDF	Adobe Portable Document Format file	.pdf
Excel	Microsoft Excel Format file	.xls

Adding Branch and Van Line Images to Documents

A company can display their logo or its van line image on report documents such as invoices and customer statements. The following standard report documents provided by MoversSuite have the ability to display images for the branch and van line:

- Customer Statement
- Quote
- Standard Invoice (long)
- Standard Invoice (short)

Important: Only certain report documents have been designed to display the branch or van line image, such as those listed above. Contact MoversSuite to find out more about adding images to other documents.

For all documents, the branch image will generally appear on the left while that of the van line will appear on the right.

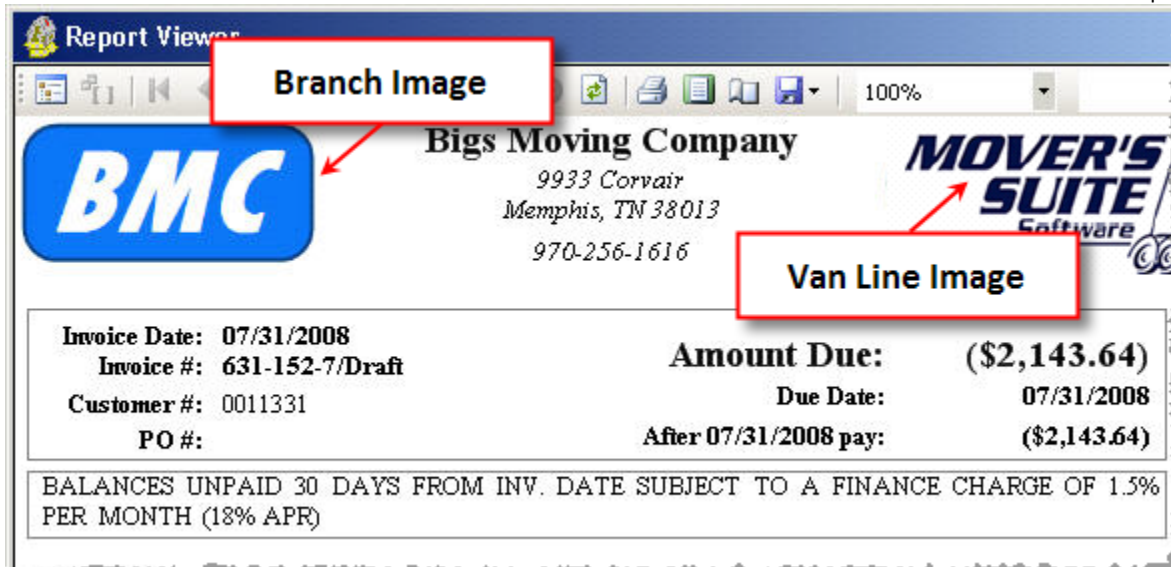


Figure 30: Branch and van line image locations on an invoice document

The following steps are needed to add a branch or van line image to a report document:

1. Upload the image file into the Microsoft SQL Server Reporting Services
2. Set the Image URL field for the Branch and Van Line records to recognize the image file
3. Set the Invoice Properties settings to turn on the imaging functionality for report documents

The image files supported by this functionality include all those widely accepted by most web browsers, such as Microsoft Internet Explorer and Mozilla. These file types include BMP, GIF, JPEG, PNG, TIFF and may need to be adjusted to fit correctly within the two by three inch area available on invoices, quotes, and customer statements.

Uploading the image file into Microsoft SQL Server Reporting Services

MoversSuite will use the Report Viewer to produce the output of documents including the images therefore the image files need to be loaded in into Microsoft SQL Server Reporting Services through the **Report Manager** and specifically into the application folder titled "System".

The Report Manager is part of the Reporting Services product base and allows an administrator to interact with the report server and perform tasks such as uploading report and image files, set the database pointer, and execute and view reports.

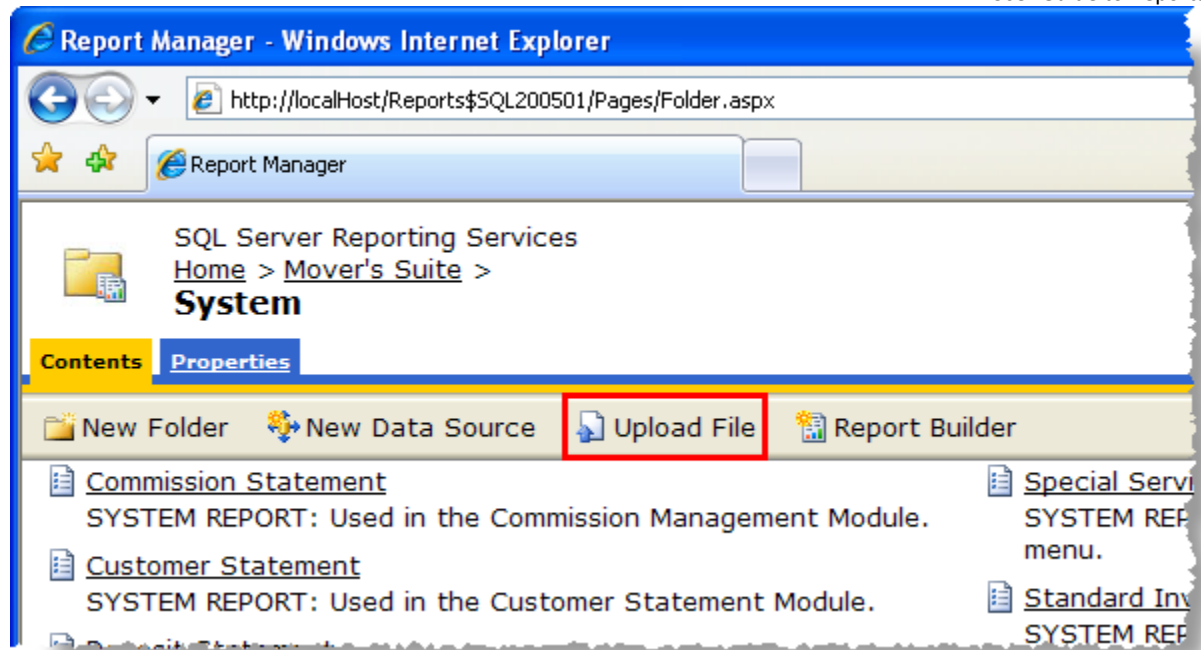


Figure 31: Upload File option in Report Manager

Use the Report Manager to update company and van line images into the System folder.

Uploading an image file using Report Manager

12. Open the Microsoft SQL Server Reporting Services **Report Manager** application using a URL that points to the service executing on a report server through a web browser. An example of the URL format is **http://report server/report instance/**,
13. **Access** the folder that contains the report documents used by the MoversSuite application,
14. Click on **System** to open the folder (typically **Home > MoversSuite > System**). The image file will need to be uploaded to the same folder as the documents that will be referencing it. For example, the standard *Customer Statement* document exists in the System folder therefore the image file must be in this same folder. **Note:** If the image file is uploaded into a different folder than that of the report document, then the application will be unable to render the image,
15. Click on **Upload File**,

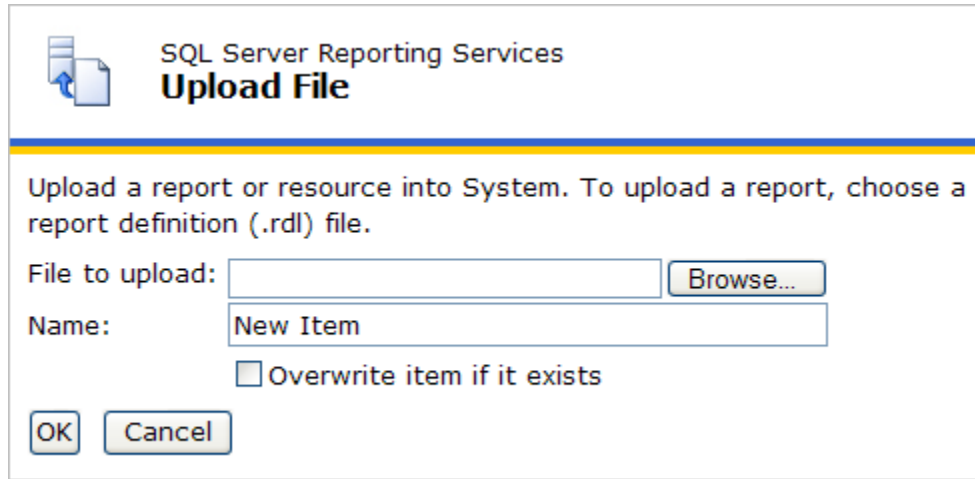


Figure 32: Upload File page in Report Manager

16. Click on the **Browse...** button to use the Choose File dialog to locate the image file to upload,
17. Once the **File name** is set within the Choose File dialog press the **Open** button. **Note:** The **File to upload** field will be updated along with the **Name** field once a file is selected,
18. Choose to **Overwrite item if it exists** to purge an existing document with the same name.
Important: If the *Overwrite item if it exists option* is not on (checked) and a document with the same name is found in the report server, then new file will not be uploaded,

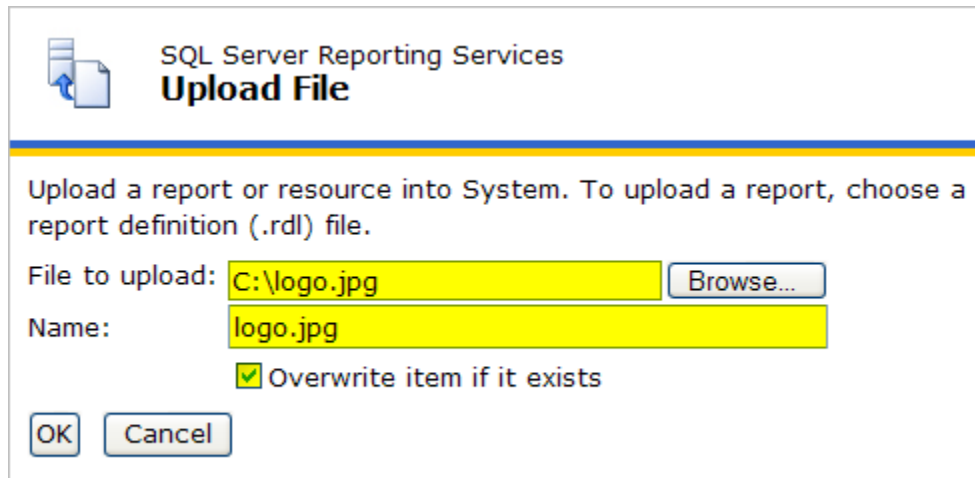


Figure 33: Sample file and name for an upload file

Tip: Use the Report Manager's search utility to locate existing files by their Name, including report and image files. The search utility is located in the upper right-hand corner of the Report Manager window.



Figure 34: Report Manager search feature

19. Press the **OK** button from the Upload File page to perform the upload,
20. **Repeat** Steps 4 through 8 to upload other files into the report server.

The image file will be visible within the System folder and will be available to be referenced by documents rendered through Microsoft SQL Server Reporting Services.

Successfully uploaded images will be listed along with all existing files stored within the report server.

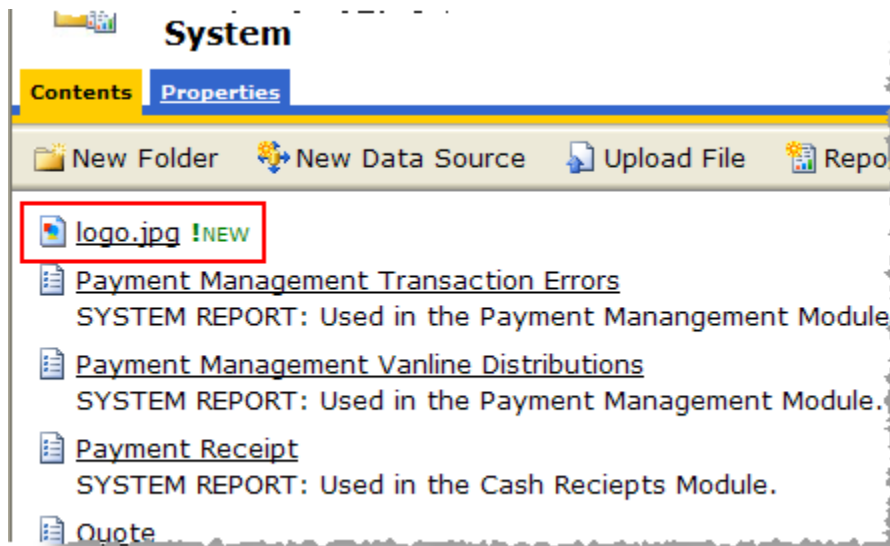


Figure 35: Uploaded image file

Tip: Clicking the file name will display the contents of the image file to the screen.

Making a image available to branch and van lines documents

The second step needed to add images to branch and van line documents is update the Image URL field for each branch and van line record.

Update the Image URL field to reference an uploaded image file

Set the branch image reference:

1. Open the **MoversSuite Administration - web**,

2. Click on **Common > Branch Setup**,
3. Select a **Branch** from the available list,
4. Press **Edit** to update the branch data,
5. Enter the **Image URL** as the name of the image document uploaded into Microsoft SQL Server Reporting Services. The name that the file assigned to the image when it was uploaded is what will need to be entered here, character for character. Case lettering of the Image URL is ignored, therefore “logo.jpg” is treated the same as “LOGO.jpg”,

The screenshot shows a web form for editing a branch. At the top, there is a dropdown menu for 'Branch' set to 'B0221 - BR0221' and a 'New' button. Below this are two tabs: 'General' (selected) and 'Contacts'. Under the 'General' tab, there is a section titled 'General Information' containing several input fields:

- Name: BR0221
- Branch ID: B0221
- Agent: U0221 (dropdown)
- Van Line: BV
- Estimate Prefix: 221
- Estimate Number: 1186
- Image URL: logo.jpg (highlighted in yellow)
- DOT: (empty)
- Dispatching Common View: RLOC

Figure 36: Image URL field within Branch Setup

6. Press **Save** to keep any changes made,
7. **Repeat** Steps 3 through 6 to assign an image file to other branches,

Set the van line image reference:

8. Open the **Mover's Suite Administration**,
9. Locate and open the **MMS > General > Van Line** setup folder,
10. Select a van line by **Van Line ID**,
11. Enter the **Image URL** as the name of the image document uploaded into Microsoft SQL Server Reporting Services,

The screenshot shows the 'Mover's Suite Administration' application window. On the left is a tree view with folders: 'Mover's Suite', 'AFS', 'Common', 'MMS', 'Account Pr', and 'General'. The 'General' folder is expanded. On the right is a data table with columns: 'VanLineID', 'VanLineName', 'CustomerNumber', 'VendorNumber', 'ImageURL', 'DOT', and 'Pr'. The table contains one row for 'BV' (Big Van Line) with '93999' in the CustomerNumber column and 'logo.jpg' in the ImageURL column (highlighted in yellow). Above the table is a text prompt: 'Drag a column header here to group by that column'. Below the table is a text prompt: 'Click here to add a new row'.

VanLineID	VanLineName	CustomerNumber	VendorNumber	ImageURL	DOT	Pr
BV	Big Van Line	93999		logo.jpg		

Figure 37: Image URL field within Van Line setup

Note: If the Image URL field is not listed, then add it by right-mouse clicking on the Van Line folder name, selecting New > Fields, and choosing the ImageURL field from the pop-up windows listed. Press Add to close the window and add the field to the Van Line setup table.

12. Press the **TAB** key through the remaining record values to keep the change made to the Image URL field. **Note:** The van line referenced for the imaging is that assigned to the branch. Refer to the **MoversSuite Administration - web > Common > Branch Setup > Van Line** field,
13. **Repeat** Steps 10 through 12 above steps to assign image files to other van line records.

Turning on the branch and van line image functionality

So far in this process, an image file has been loaded into the report server and the branch and van line records have been updated to reference the uploaded image file. The last step is to set flag(s) for each report document to include the image.

Turning on branch and van line imaging for a document


1. Open the **Mover's Suite Administration**,
2. Open the **AFS > Invoice > Invoice Properties** setup folder,
3. Select a report document from the list of **Report Name** values,

Note: Only certain report documents have been designed to display the branch or van line image. Contact Mover's Suite to find out more about adding images to other documents.
4. Place a check in the column to **Include Branch Image** and/or **Include Van Line Image** for the selected report document,

Drag a column header here to group by that column			
Report Name	Include Branch Image	Include vanline Image	Hide Header Address
*	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
/Mover's Suite/System/Customer Statement	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
/Mover's Suite/System/Quote	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
/Mover's Suite/System/Standard Invoice (long)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Figure 38: Include image options within Invoice Properties

5. Press the **TAB** key through the record to keep the changes,
6. **Repeat** Steps 3 through 5 to enable other report documents to display the branch or van line image.

If the **Include Branch Image** or **Include Van Line Image** is on and a branch or van line image has not been loaded into the report server, then an image rendering error icon () will appear in its place.

Custom Report Document Setup

Custom documents are files considered outside the standard list of documents provided by Mover's Suite, including those documents developed by Mover's Suite for a specific customer.

In any case, these documents should follow the same rules that apply to standard Mover's Suite documents. Additionally, they should be stored within a directory that is accessible to the Mover's Suite application, but safe from application's installation process.

Custom Letter and Crystal Report Documents

Documents defined as Letters or Crystal Reports, which must physically reside on the application server, should be stored in a place where they will not be overwritten by a Mover's Suite process. In general, the `\\[Server Name]\mssShare` folder will not be overwritten and is considered a safe place to put custom documents, however, the name of any custom file should not be the same as any standard Mover's Suite file; the Mover's Suite installation process will overwrite any file that is of the same name as the file it is attempting to place on the system.

Suggested format for custom physical documents:

`\\[Server Name]\mssShare\mssLetters\Custom\`

-Or-

`\\[Server Name]\mssShare\mssLetters\Crystal Reports\`

Where [Server Name] represents the name of the server that hosts Mover's Suite

Custom Report Services Report Documents

Custom reports designed within Reporting Services should also be stored within a safe folder within the server. This is typically done by creating a folder that separates these documents from the standard ones supplied by Mover's Suite.

In the example below, a user has created a custom folder from within the Report Manager.

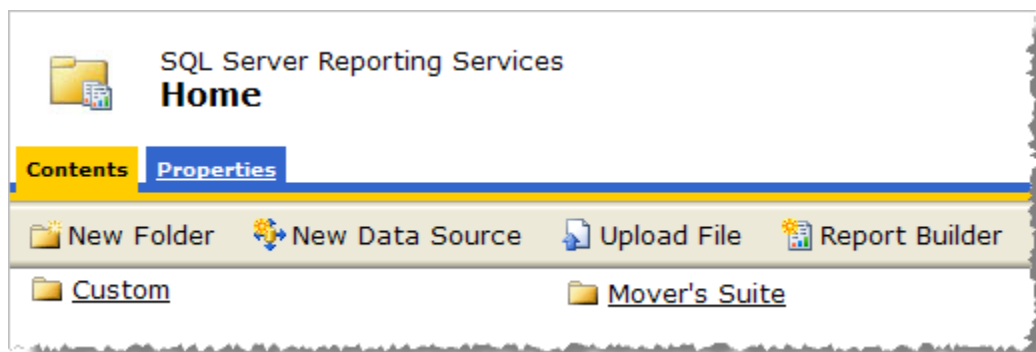


Figure 39: Custom folder from within the Report Manager

The Report Path that would be referenced for the Reports setup would be similar to the following, for example:

http://[Server Name]/ReportServer/Custom

Where [Server Name] represents the name of the reporting server

Contact your Mover's Suite support professional for more information on custom reports.

Allowing Access to Reports Documents

To access Reports documents within Mover's Suite, a user's Report Profile must be updated. A **Report Profile** is a type of user that can access the reports. This type is assigned to a user through the **Personnel** settings.

A Report Profile can have any number of documents assigned to it through the Report Profile Details setting. The **Report Profile Detail** setup links documents defined in Reports to a Report Profile.

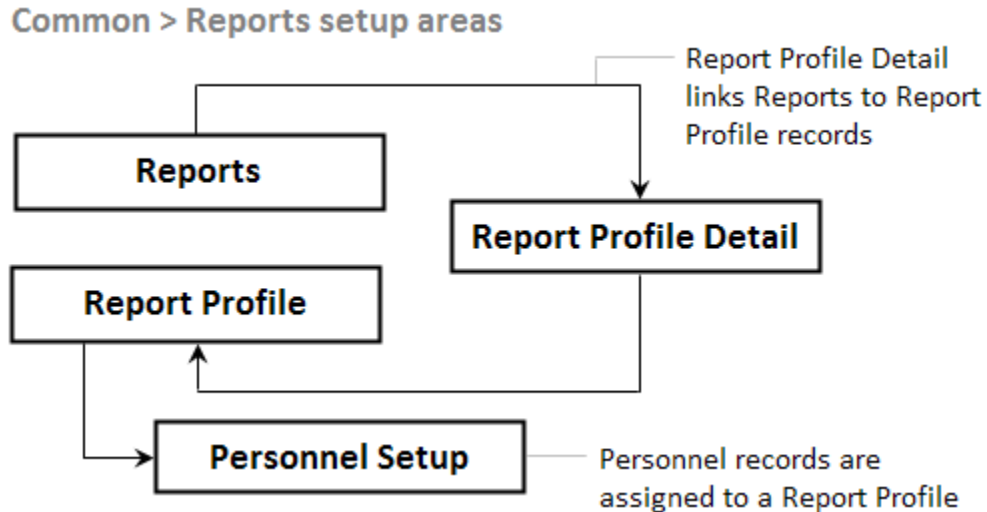


Figure 40: Reports setup flow diagram

Once the document is linked to the employee, they will be able to access the document through Mover's Suite.

Report Profile Settings

Define a group of users to access documents within the Report Profile setup.

Establishing Report Profiles

1. Access the **Mover's Suite Administration**,
2. Open the **Common > Reports > ReportProfile** setup,

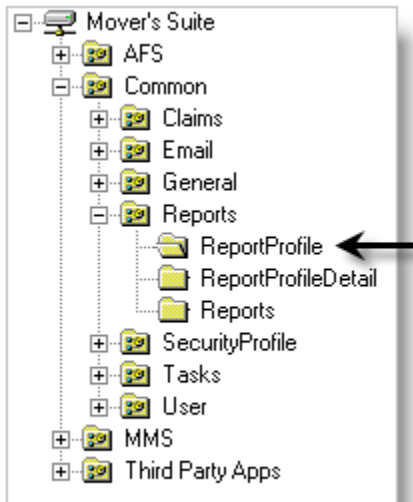


Figure 41: Report Profile Detail setup section

3. **Click** the mouse in the row describing “Click here to add a new row”,
4. Enter a **Description** for the group of users who will be access the reports, such as “Coordinator”,
5. Press the **Tab** key to add the record to the database,
6. **Repeat** steps 3 through 5 to define other profiles.

Report Profile Detail Settings

Report Profiles are typically established when MoversSuite is initially installed and will be available within a drop-down menu, when updating the Report Profile Details. Updating these records creates the link between the Reports documents and the Report Profile.

Linking Reports to Report Profiles

1. Access the **Mover’s Suite Administration**,
2. Open the **Common > Reports > ReportProfileDetail** setup,

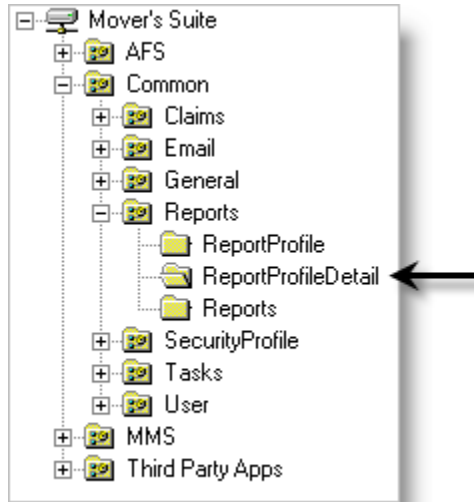


Figure 42: Report Profile Detail setup section

3. In the entry row, select a **Report Profile** from the list of available profiles,
4. Select a **Report Name** from the list of available report documents,
5. Press the **Tab** key to add the record to the database,
6. **Repeat** steps 3 through 5 to define other profiles.

In the example below, the profile titled “Coordinator” has access to the documents titled *Unassigned Order*, *Unregistered Orders Master*, *Unregistered Orders*, *User Details List*, and *Work Ticket*.

Drag a column header here to group by that column	
Report Profile	Report Name
*	Click here to add a new row
Coordinator	Unassigned Orders
Coordinator	Unregistered Orders Master
Coordinator	Unregistered Orders
Coordinator	User Details List
Coordinator	Work Ticket

Figure 43: Report Profile Detail example

View the [Reports and Letters Report](#) for a complete listing of profiles and reports.

Changes made here affect which reports will be available to a user, as further defined within the Personnel setup of the MoversSuite Administration - web.

Report Profile Setting in Personnel Setup

The **Report Profile** setting, within the **Personnel** setup of the **MoversSuite Administration - web** allows an administrator to assign Report Profiles to employees, hence giving them access to the documents it represents.

Setting or updating a user's Report Profile, will grant them access to the documents for which the profile represents.

Assigning Personnel to a Report Profile

1. Access the **MoversSuite Administration - web**,
2. Select the **Personnel** setup within the User Setup section,
3. Choose an **Employee** from the list available through the drop-down menu, (or press **New** to create an employee record) and the data for the employee will paint to the screen,
4. Click on the **User Setup** tab,

The screenshot shows the 'User Setup' tab of the Personnel Setup interface. It includes the following elements:

- Tabs: General, Contact, Dispatch, Web User Setup, **User Setup**, Roles
- Number of Users** section: Existing Users: 90, Licensed Users: 100
- User Access** section:
 - Username: auser
 - Password: [masked]
 - Security Profile: Administrator
 - Report Profile: Administrator** (highlighted with a red arrow)
- Buttons: Delete, Edit, Save, Cancel

Figure 44: User Setup tab of Personnel Setup

5. Press **Edit** to allow for the fields to be edited,
6. Select a **Report Profile** from the drop-down list,
7. Press **Save** to keep the change,
8. **Repeat** steps 2 through 7 to update the profile for other employees.

Once set, the user can then access the application and view the documents assigned to them.

Troubleshooting Reports

This section covers the causes and resolutions to some of the more common reporting problems a user may encounter.

Issue:	Document is missing from the list of reports
Cause:	The user does not have access to the document, or the document is not defined.
Resolution:	<p>Verify that the document is established within the Reports setup and that user has appropriate access to the document.</p> <p><i>Check the following areas:</i></p> <p><u>Mover's Suite Administration:</u></p> <ul style="list-style-type: none"> - Common > Reports Setup (to ensure that the document is defined) <p><u>MoversSuite Administration - web:</u></p> <ul style="list-style-type: none"> - User Setup > Personnel > User Setup (to ensure that the user is in the correct Report Profile) <p>Reference the Reports and Letters Report to identify which reports and profiles have been defined to be accessible within MoversSuite.</p>

Issue:	Document cannot be found
Cause:	The application or the Report Viewer may list an error when it cannot find a file. The error should include the name of the file that it is attempting to open.
Resolution:	Verify the settings within the Reports setup of the Mover's Suite Administration. If the settings are correct and the file is a Reporting Services Report, then verify that the report is correctly loaded within the Report Server. If the problem persists, contact an Information Technologies (IT) expert.

Issue:	Document button pushed, but nothing happens
Cause:	<p>Often a report may take longer to generate than is anticipated. When the document is generated through a button, no Report Viewer message will display and, often, error messages <u>may not appear</u>.</p> <p>Another cause could be that the System ID for the button is missing or invalid within the Reports setup.</p>
Resolution:	Wait for the report to generate, or check the System ID setting within the Reports setup (refer to the Accessing Documents through Buttons section for a complete listing).

Issue:	No record found
Cause:	The program was unable to locate any records, or an invalid argument was entered as a parameter. The latter typically involves the user selecting a system-generated document from the lower section of the Reports menu. Errors similar to “The ... parameter is missing a value” or “0 could not be found” will usually be generated from this.
Resolution:	Verify that the argument was entered correctly, and for system-generated reports, setup the document to be rendered through a button (see the Accessing Documents through Buttons section).

Issue:	Reporting Services Error
Cause:	There can be a number of reasons that can cause a Reporting Services error, including that the Reporting Service is not responding, cannot find requested document, the requested document is of the wrong type, the application is attempting to pass invalid data to the document, etc.
Resolution:	If the error returned is not enough to identify and correct the problem, then verify that the requested document is setup correctly and that the Reporting Services is running correctly, or contact you Information Technology (IT) expert to identify the source of the problem.

Issue:	Branch or van line image not appearing on customer statements, invoices, or quotes
Cause:	Image not loaded into the report server or is placed in the wrong folder in Report Manager. Another cause may be that the document has not been designed to render images.
Resolution:	Verify that all the steps have been followed as documented in the Adding Branch and Van Line Images to Documents section.

Sample Reports Settings

A sample of the Reports setup for the three Report Types is listed below:

Crystal Report Sample Reports Setup	
Menu Name	Government Form 1113
Report Name	Gov SF1113.rpt
Report Path	\\RSQL-01\mssShare\mssReports\Crystal Reports\Forms\Government
Report Type	Crystal Report
System ID	RSBI or REVI
Render Type	Adobe Portable Document Form

Letter Sample Reports Setup	
Menu Name	Order Confirmation
Report Name	Order Confirmation.doc
Report Path	\\RSQL-01\mssShare\mssLetters
Report Type	Letter
System ID	
Render Type	Adobe Portable Document Form

Reporting Services Report Sample Reports Setup	
Menu Name	Quote
Report Name	/MoversSuite/System/Quote
Report Path	http://RSQL-01\ReportServer
Report Type	Reporting Services Report
System ID	QUOT
Render Type	Adobe Portable Document Form