

Accord Defined Reports

User Guide

Document: **Accord Defined Reports V1.8 User Guide.Docx**

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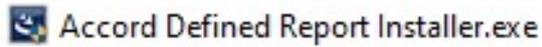
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1 Introduction

Accord Defined Reports allows for the configuration of one or more Bespoke client Reports. Each Report is unique to client and will have unique setups, configurations and format.

2 Installation

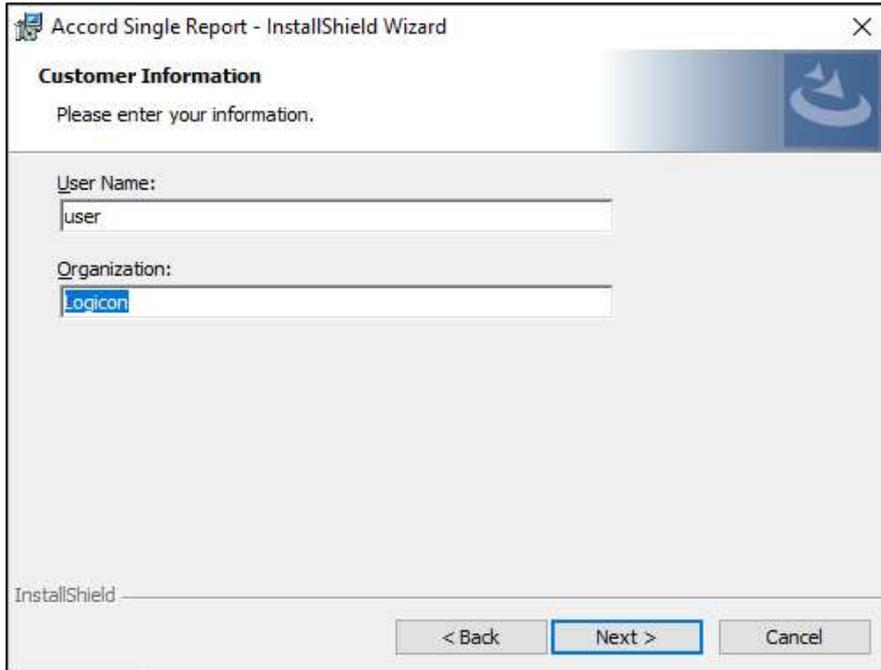
Double click installation file to install Defined Reports. See image below for reference.



Installer will fire up and Install Shield Wizard will appear, press Next to continue with installation.



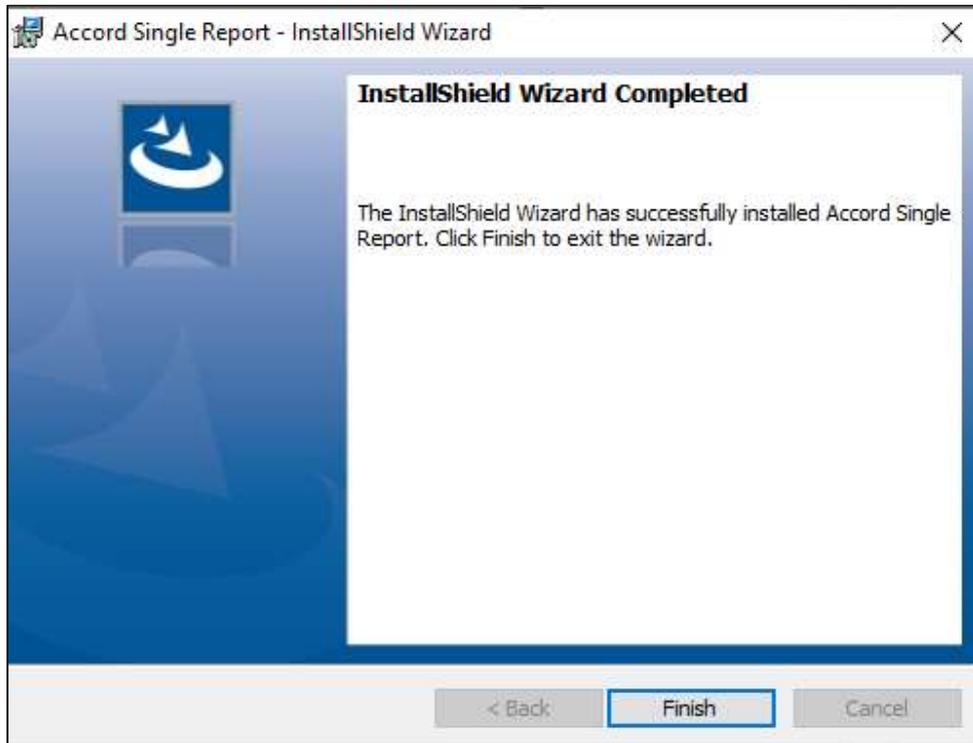
Fill in Customer Information, type Username and Organization, press Next to continue. See image below for reference.



Check the details and press Install.



After the installation is complete, press finish.

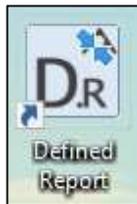


3 Connection to Accord Server

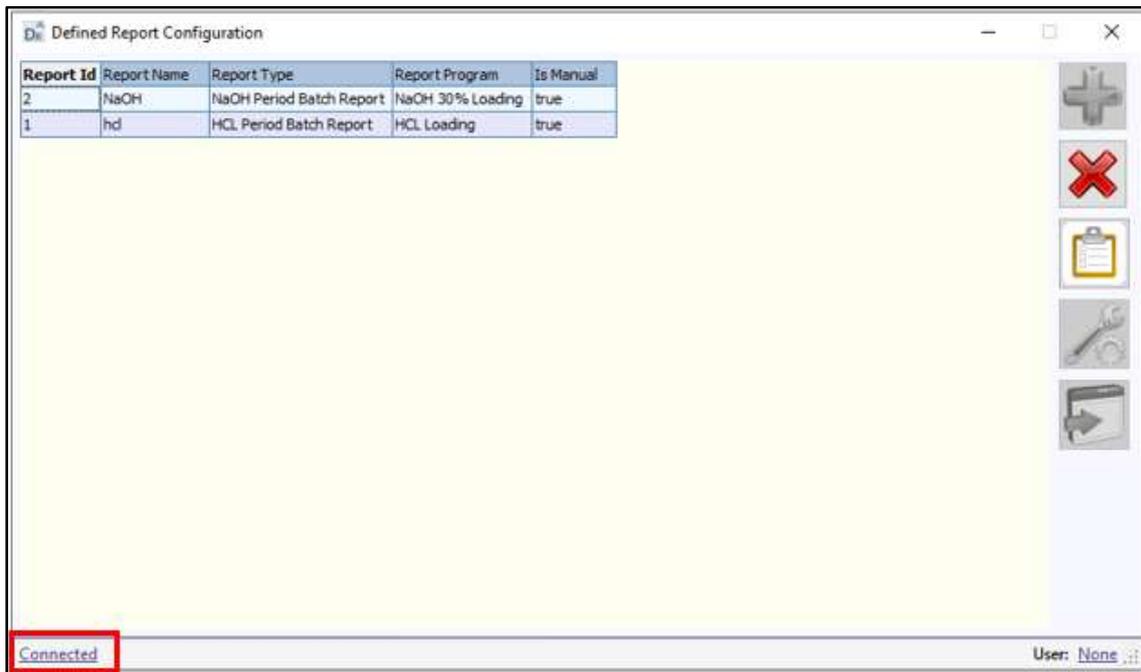
Once installed the Reports module must connect to an Accord Server for data. Reports should find the Server module automatically if it is on the same PC.

Note: The license applied to the Accord Server must include a Reports license of sufficient band size to enable the functionality of the Reports application. Please refer to the Accord Server User Guide for more information.

Locate Defined Reports shortcut icon on the desktop. Double click to start the application.

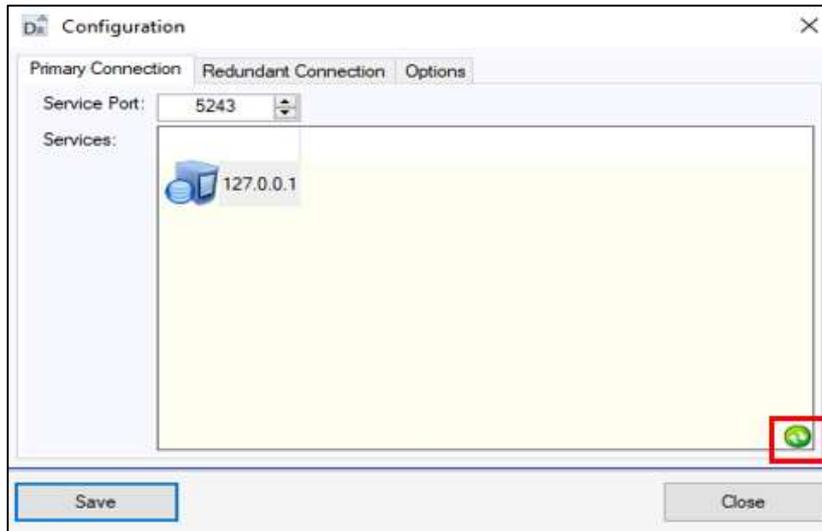


When the application starts the application will load the main form. On the bottom left side of the form check for the Connected to Service status at bottom of Screen. See the highlighted area in the image below.



If disconnected, then perform Search by clicking on the Connection Status (highlighted above).

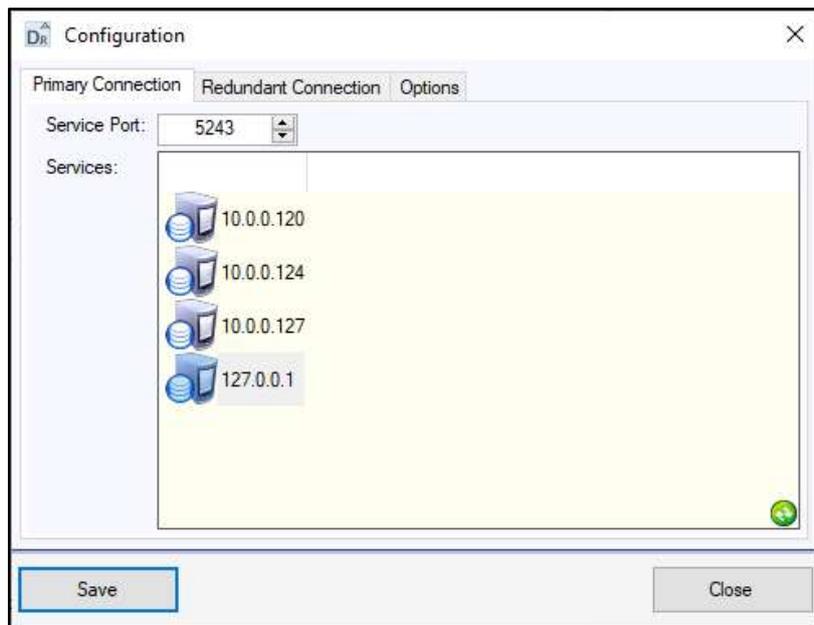
This will cause the following popup to appear with Green Refresh button at Bottom (highlighted below).



Click on the Green Refresh button to begin search for Accord Server by IP address. This will find Accord Servers available, with appropriate IP addresses. Select required Server and press Save.

If this does not return appropriate IP, check that:

- Check that Accord Server is running.
- Check that Accord Server PC connected if it is another PC.



3.1 User Login

After connecting Log-In by clicking on the User: in the bottom right of the Screen (highlighted below).



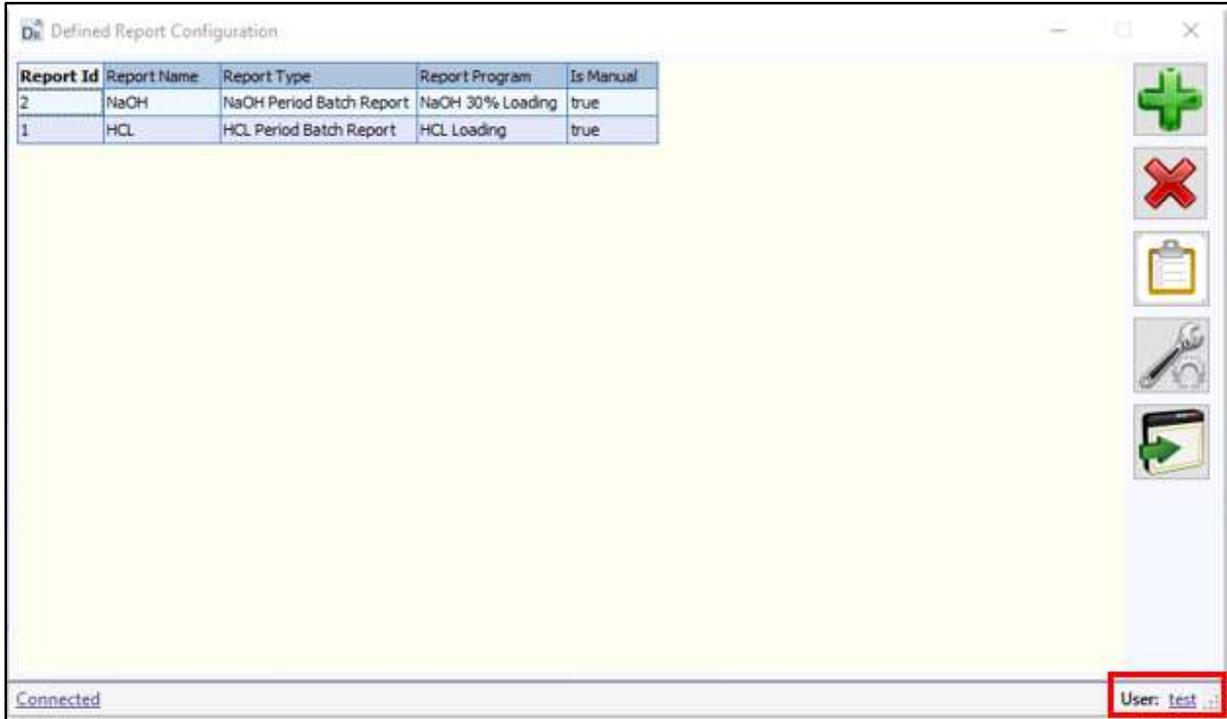
Type in Username and Password and press login,



Accord Defined Reports



After successful login all the controls on the form are enabled and username displayed on the bottom right of the form, see highlighter area below.



4 Setup selection of registers

Press + icon on the form, report configuration will open which allows to create reports.

The screenshot shows a window titled "Defined Report Details" with the following configuration:

- Report Type: HCL Period Batch Report (dropdown menu is open showing "HCL Period Batch Report" and "NaOH Period Batch Report")
- Report Name: (field is currently hidden by the dropdown menu)
- Configuration:
 - Project: CHM Foynes Tanks
 - Load Program: HCL Loading
 - Load Meter: HCL Loading Bay 01 Program Weight
 - Unload Program: HCL Unloading
 - Unload Meter: HCL Unloading Program Weight
- Tank Configuration (6 tanks):

Tank	Load Decision	Unload Decision	Weight
Tank 1:	HCL Loading Tank 01	HCL UnLoading Tank 01	HCL Tank 01 Weight
Tank 2:	HCL Loading Tank 02	HCL UnLoading Tank 02	HCL Tank 02 Weight
Tank 3:	HCL Loading Tank 03	HCL UnLoading Tank 03	HCL Tank 03 Weight
Tank 4:	HCL Loading Tank 04	HCL UnLoading Tank 04	HCL Tank 04 Weight
Tank 5:	HCL Loading Tank 05	HCL UnLoading Tank 05	HCL Tank 05 Weight
Tank 6:	HCL Loading Tank 06	HCL UnLoading Tank 06	HCL Tank 06 Weight

Buttons: Save, Close

- Press a dropdown control in Report Type configuration, this will display the list of available reports.
- Type in unique Report Name in the location provided (Currently hidden by the list of reports).
- Select the rest of the settings as required for selected report. Press save button. The report will appear on the main form. In this case both reports were created already there for they displayed on the screen. See the highlighted area below.

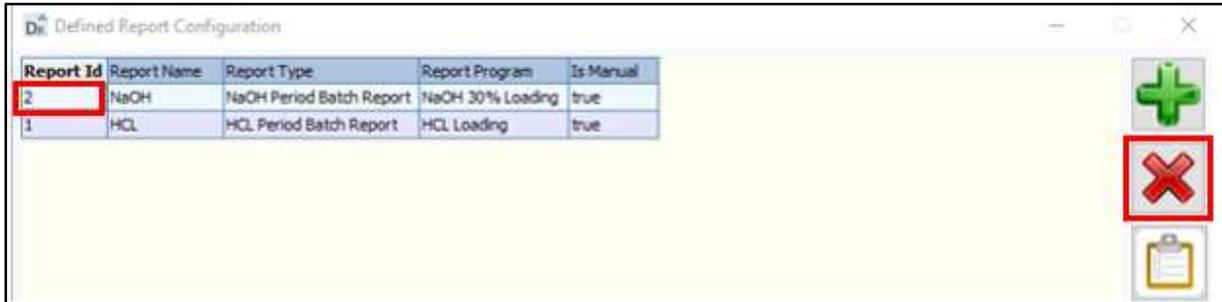
The screenshot shows a window titled "Defined Report Configuration" with a table of existing reports:

Report Id	Report Name	Report Type	Report Program	Is Manual
2	NaOH	NaOH Period Batch Report	NaOH 30% Loading	true
1	HCL	HCL Period Batch Report	HCL Loading	true

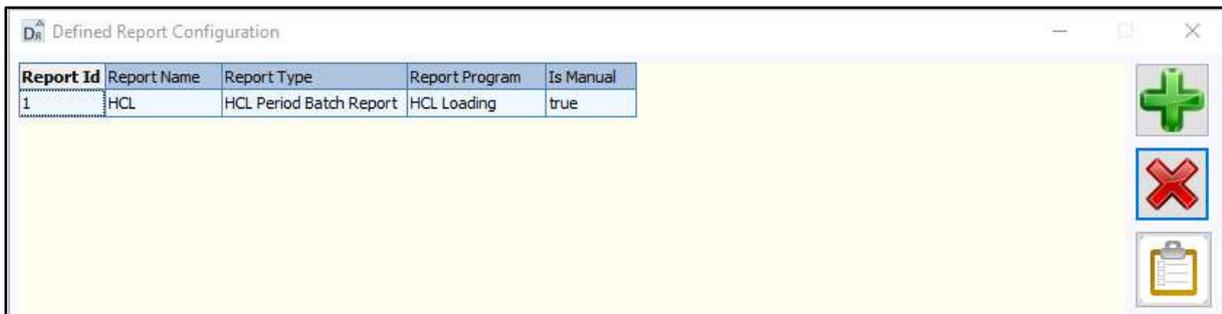
Buttons: + (Add), - (Remove)

5 Deletion of a Report

Select report on the main form by pressing on report Id. Press x icon to delete selected report. See image below for reference.

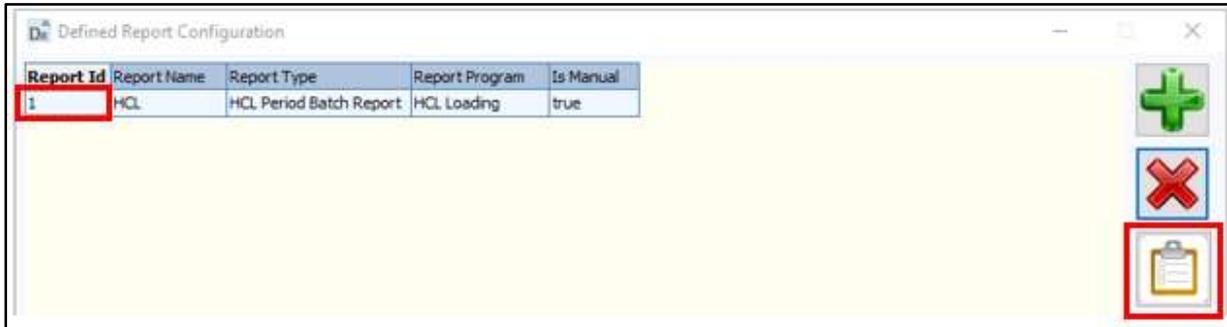


Report will be deleted and removed from the main screen.

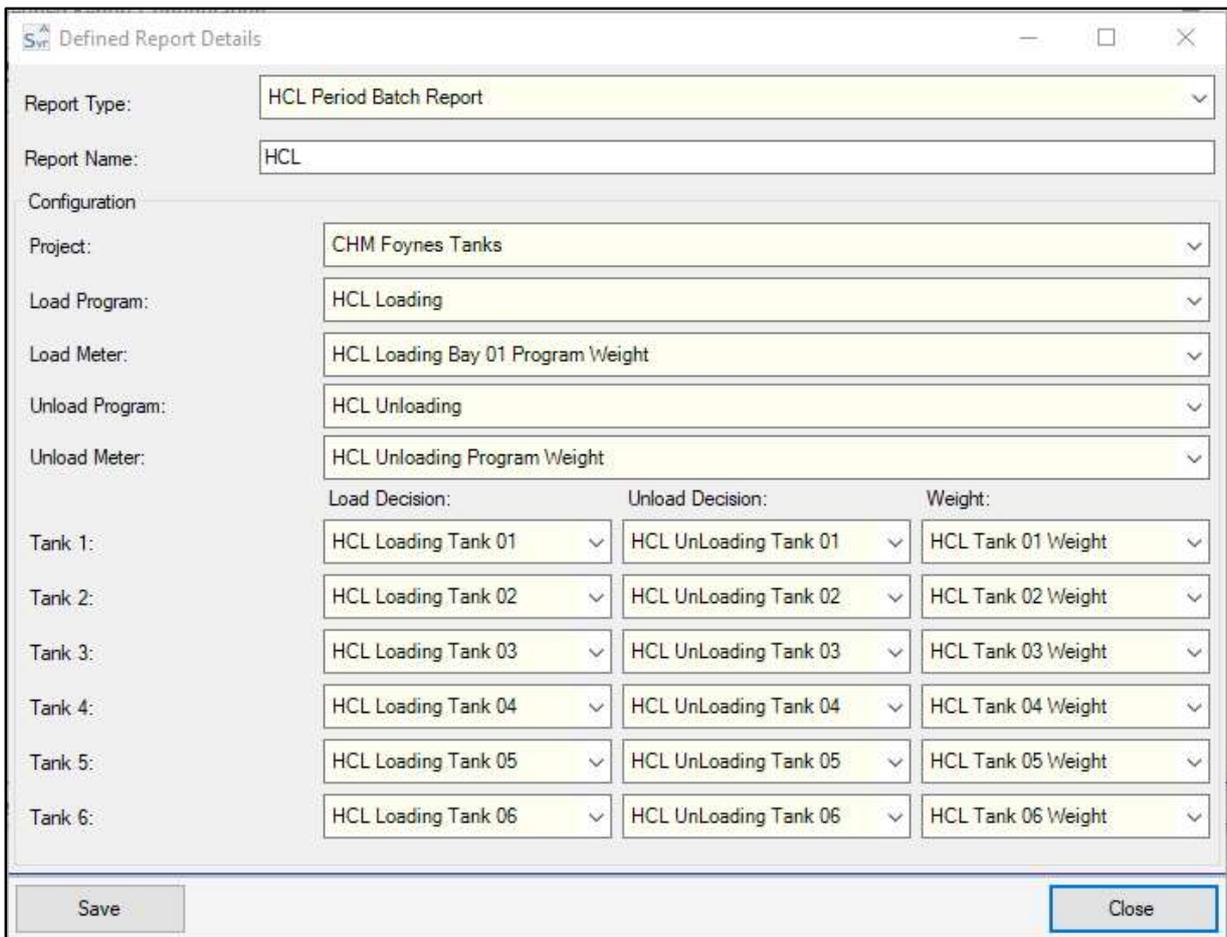


6 Editing of a Report

Select report for editing and press highlighted icon to edit report configuration.

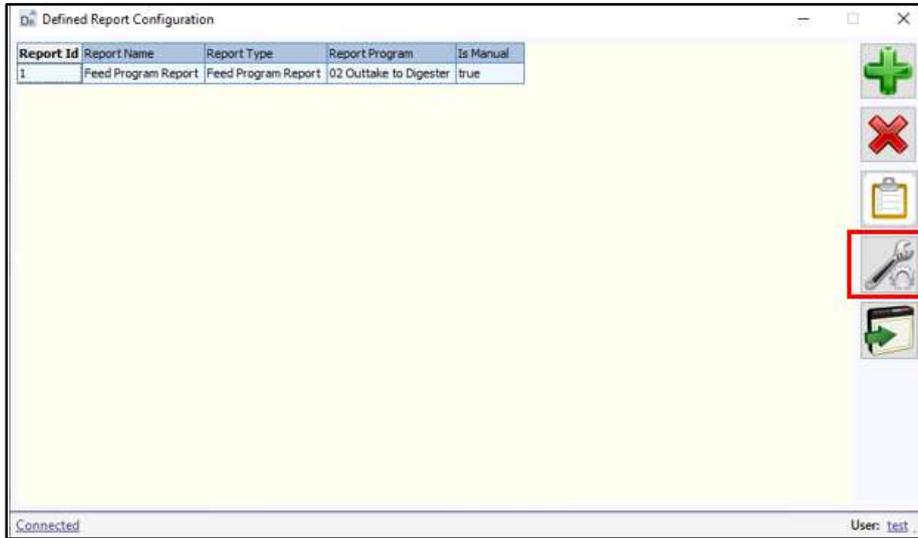


Configure required changes in report configuration form and press save.

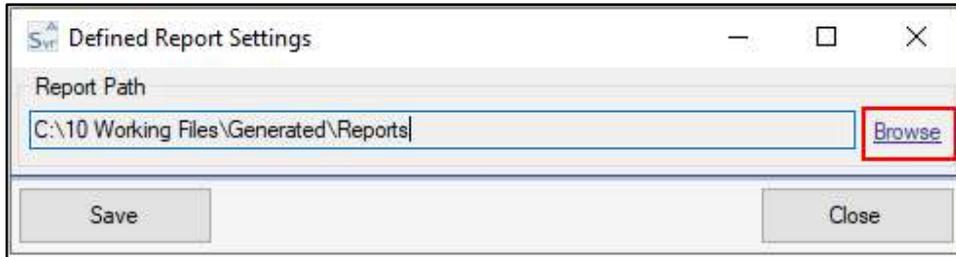


7 General Settings

Click highlighted icon to access settings form, see image below for reference.

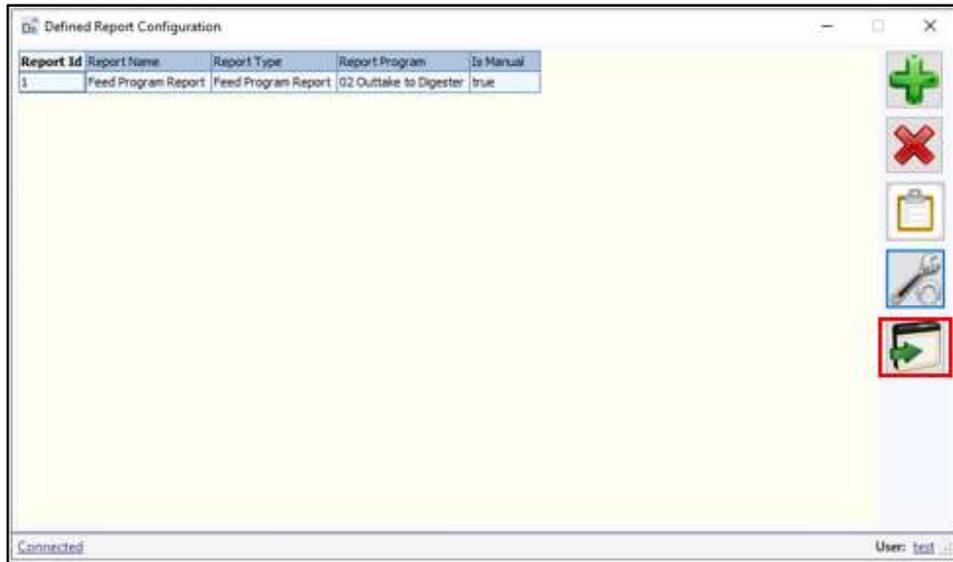


Click on Browse to select location for the storage of generated reports, press Save button. See image below for reference.

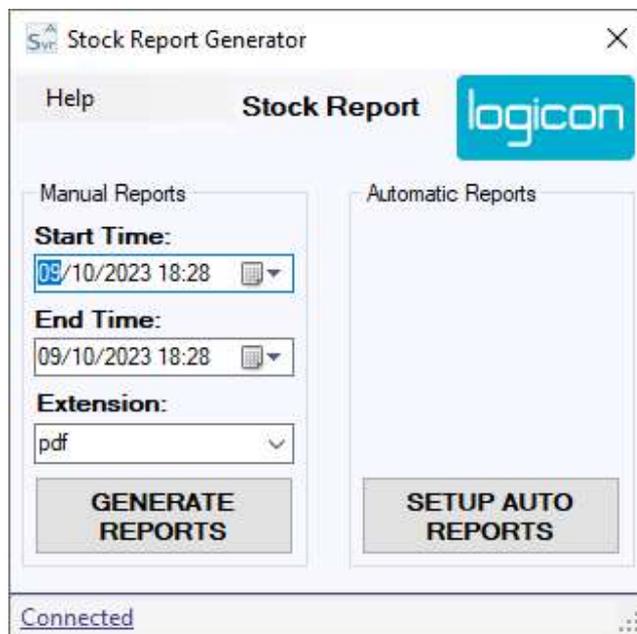


8 Manual Generation of Reports

Reports are manual and Realtime, Realtime reports generated after the program finished and no user interface required. To generate manual report, open manual reports configurator, click on the highlighted icon,



Select Start and End time, only data between those times will be used to generate report. Press Generate Report button. If required select from two available extensions: pdf and xlsx. Default extension type is pdf. Report will be stored in the location selected using Settings form, described in previous topic.



9 Daily Reports Generation

Click on Set Auto Report button. In the form appeared select Report from the dropdown box provided. Select Daily Reports. Select Report Generation Time, click checkbox to the right of the email displayed to select it. Press Save button. The report will be generated and emailed at the set time to the selected user emails.

The screenshot shows a window titled "Auto Report Configurator" with the following fields and options:

- Select Report:** A dropdown menu showing "Chemfloc Foynes Caustic Stock Report".
- Report Frequency:** Radio buttons for "Daily Reports" (unselected) and "Weekly Reports" (selected).
- Report Generation Day:** A dropdown menu showing "Wednesday".
- Report Generation Time:** A time selection field showing "10:01".
- Emails:** A table with columns for email name, email address, and a selection checkbox.

Email Name	Email Address	Selected
Eng1	shaun@accord.com	<input checked="" type="checkbox"/>
Engineer1	harry@accord.com	<input type="checkbox"/>
EngineerL	barry@accord.com	<input checked="" type="checkbox"/>
Manager1	michael@accord.com	<input type="checkbox"/>
Operator1	john@accord.com	<input type="checkbox"/>

At the bottom of the window are "Save" and "Close" buttons.

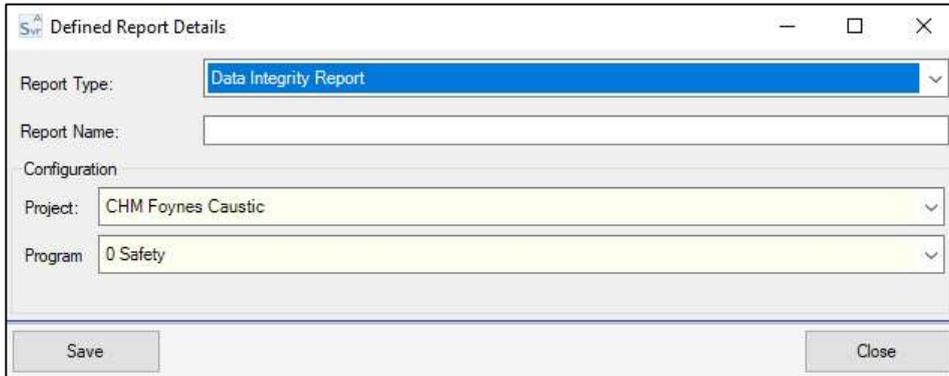
10 Weekly Reports Generation

Click on Set Auto Report button. In the form appeared select Report from the dropdown box provided. Select Weekly Reports, select weekday on which reports will be generated. Select Report Generation Time, click checkbox to the right of the email displayed to select it. Press Save button. The report will be generated and emailed at the set day and time to the selected user emails.

User	Email	
Eng1	shaun@accord.com	<input checked="" type="checkbox"/>
Engineer1	harry@accord.com	<input type="checkbox"/>
EngineerL	barry@accord.com	<input checked="" type="checkbox"/>
Manager1	michael@accord.com	<input type="checkbox"/>
Operator1	john@accord.com	<input type="checkbox"/>

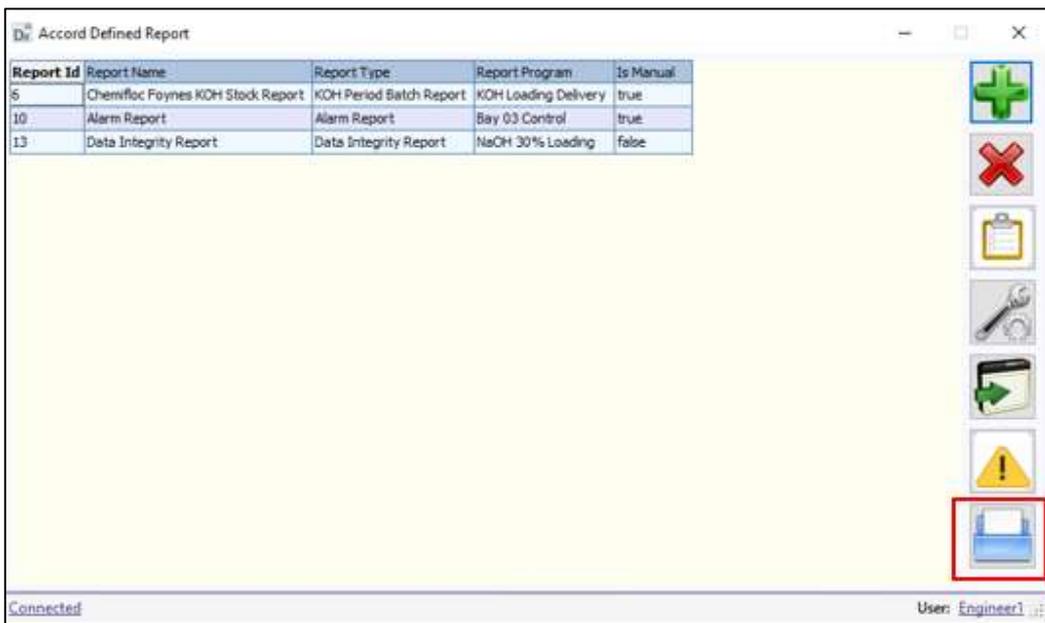
11 Data Integrity Reports

Start Defined Reports application. Click + icon and select Data Integrity Report from the dropdown list. See image below for reference.



Type Report name and select any project and program available. This is required for email setup, so it is not important which program or project are used. Click save button to store the report.

Report created and displayed in Defined Reports application. Click icon at the bottom right side to configure emails for data integrity reports. See image below for reference.



Accord Defined Reports

Select data Integrity report from the drop down list, select required emails and click save button to store report email configuration.

User	Email	
Engineer1	jack@logicon.com	<input checked="" type="checkbox"/>
Manager1	info@support.com	<input type="checkbox"/>