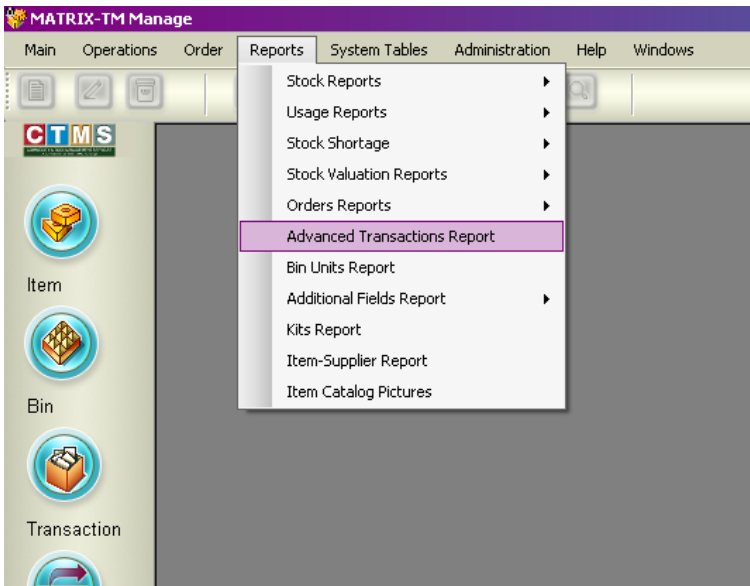
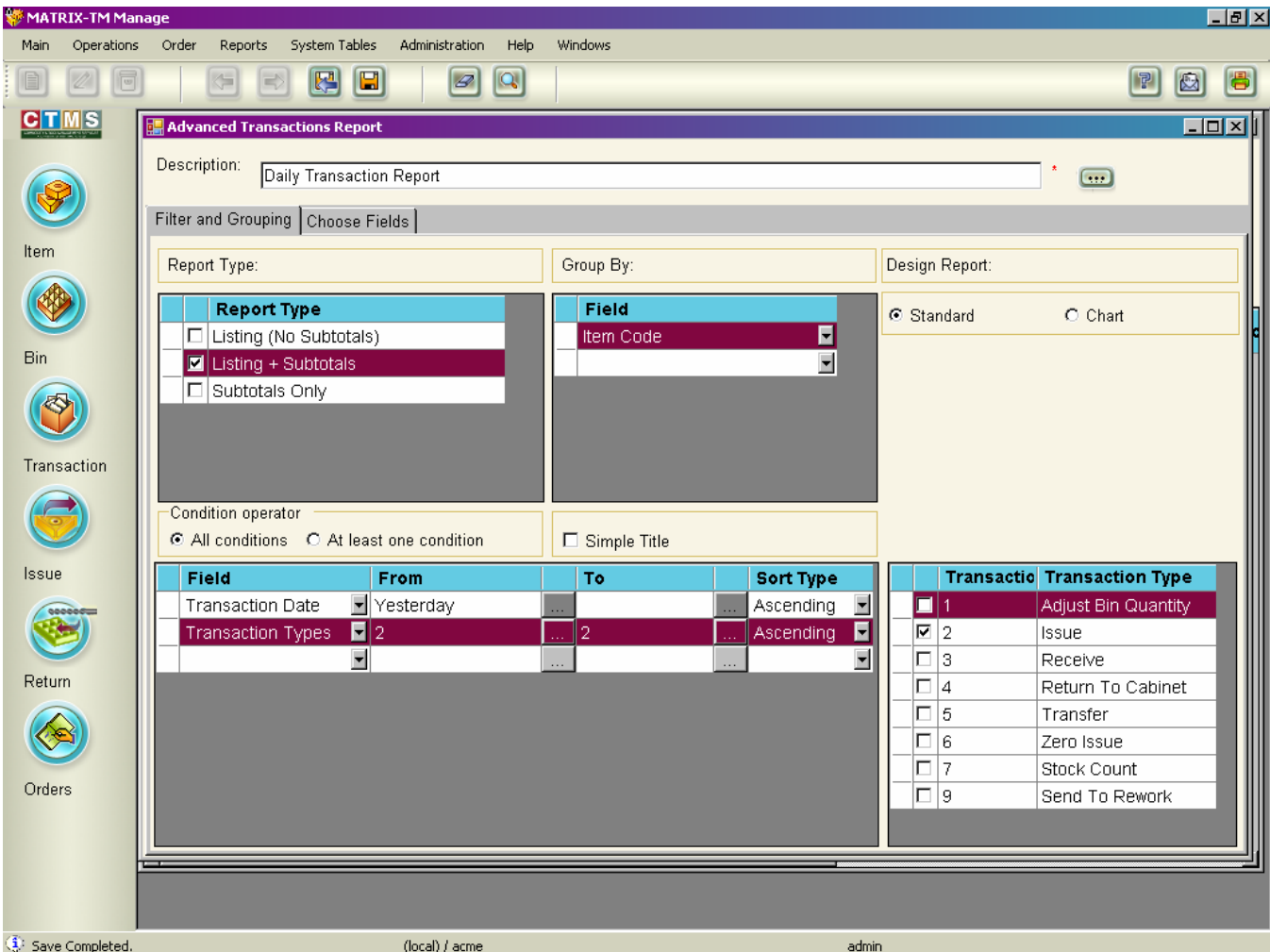


Creating Transaction Reports

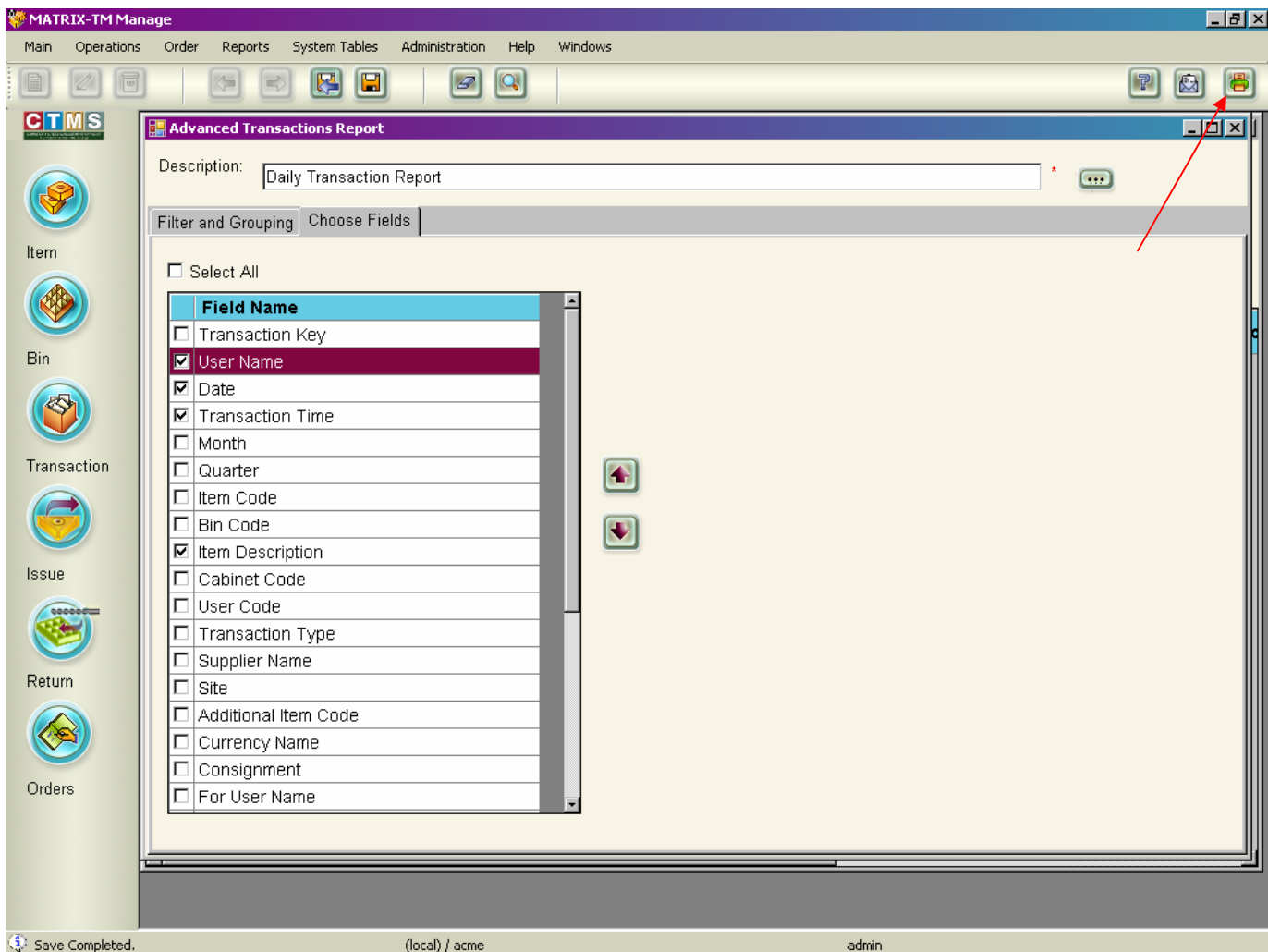
In Manage Go to Reports>Advanced Transaction Reports.



Set up as shown below. You may name it whatever works for you in the Description box. Choose the transaction types you want to report on. Generally it's just Issue. Save.

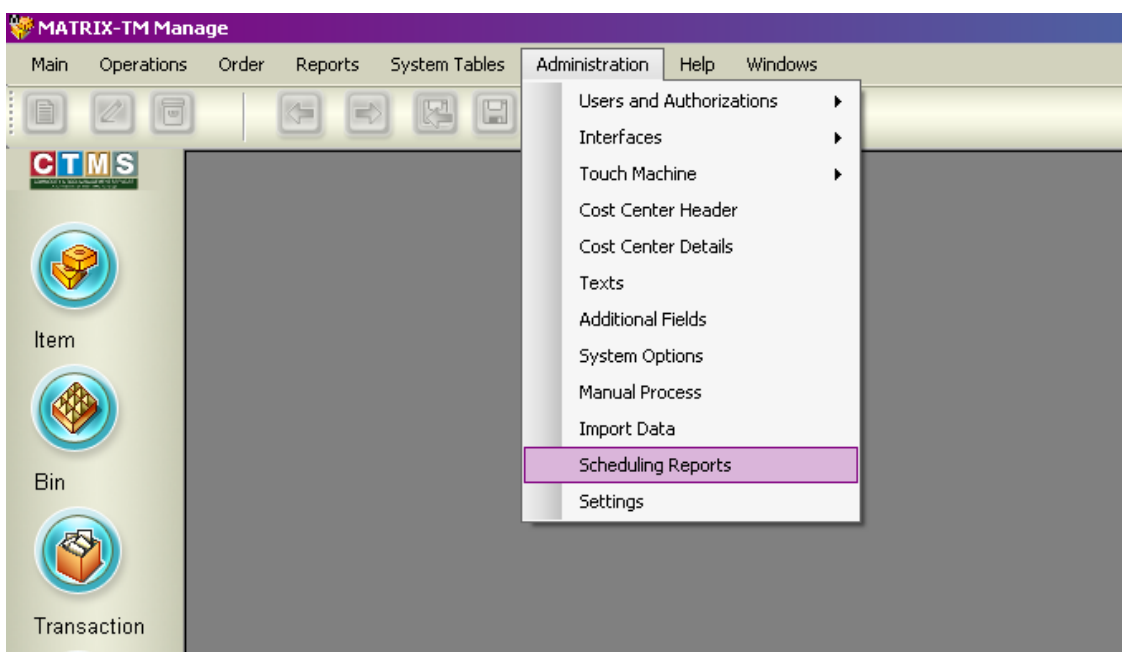


Click Choose Fields. Choose the fields you wish to show up in the report. The arrows to the right of the fields will move the Field Names so you can arrange them in the order you want them across the top of the report.

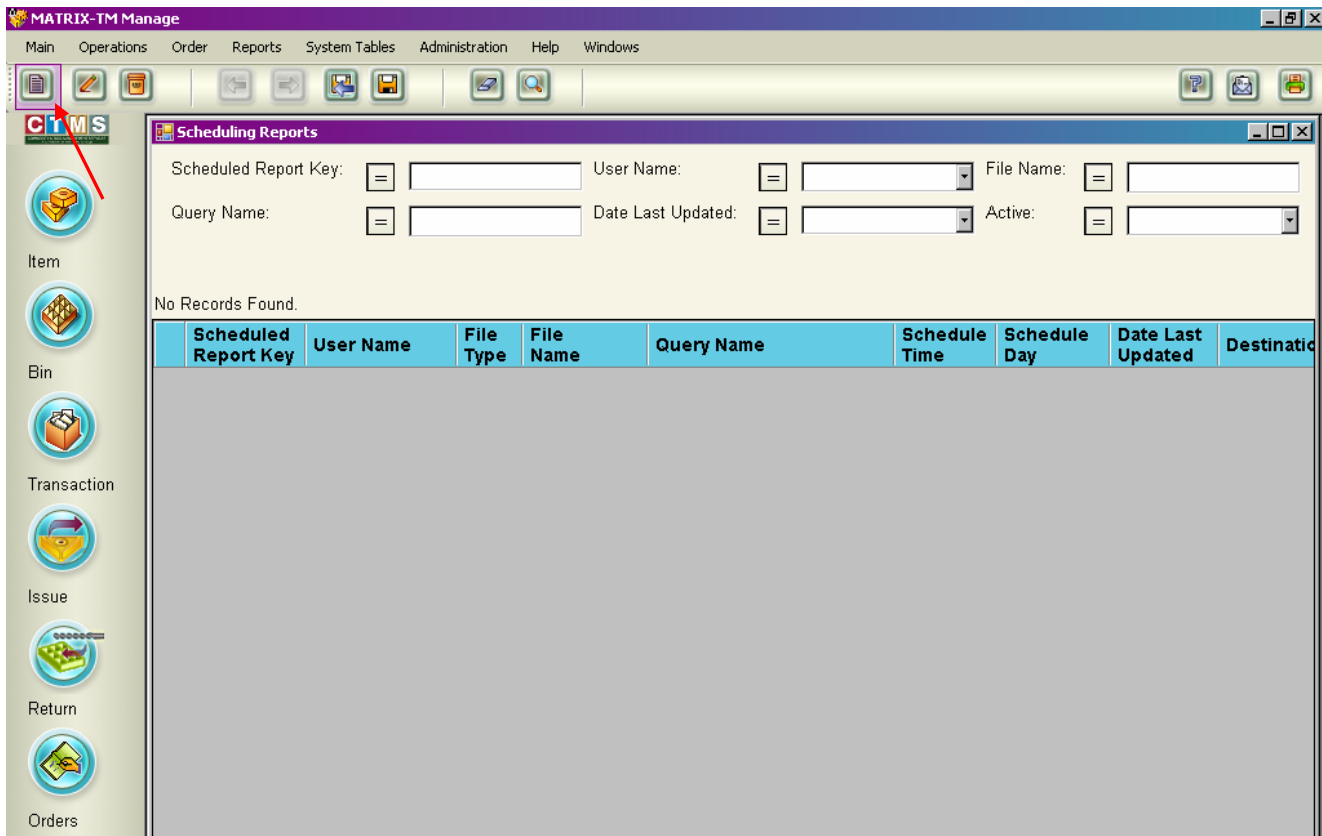


Save. Click on the Print button in the upper right to view the report format. If it is what you want, save and close.

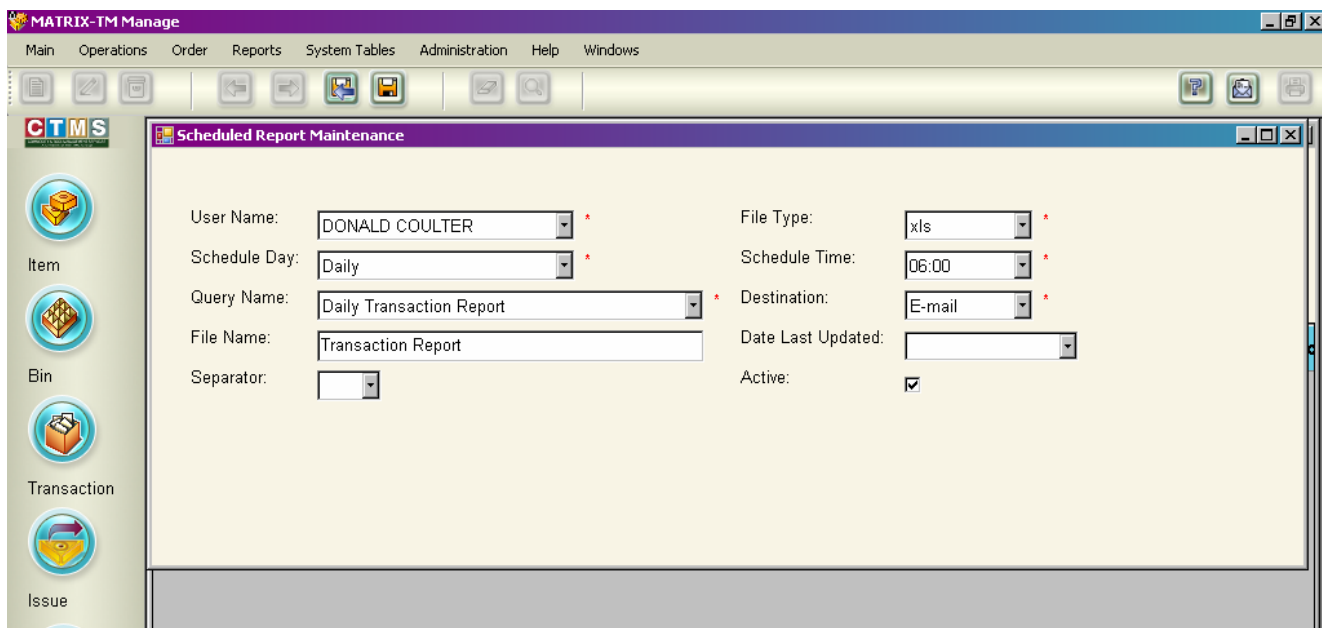
Now that the report is created we need to schedule it. Go to Administration>Scheduling Reports.



Click the Add button in the upper left.



The Scheduled Reports Maintenance screen will open. Fill in the required info from the drop down menus. If you want different people to view the reports, the report will have to be scheduled for that particular user. You can schedule as many reports as you want for as many users as you want. The file can be named whatever you want. Be sure to check the Active box. It will email the report to the user scheduled. The users email must be in the user's profile. Save and close. This report is now scheduled. Repeat the process to add different users that will receive the reports.



You will see this screen.

The screenshot shows the MATRIX-TM Manage application interface. The main window is titled "Scheduling Reports" and contains several search filters:

- Scheduled Report Key: [input field]
- User Name: [input field]
- File Name: [input field]
- Query Name: [input field]
- Date Last Updated: [input field]
- Active: [input field]

Below the filters, it states "Found 1 Records." and displays a table with the following data:

Scheduled Report Key	User Name	File Type	File Name	Query Name	Schedule Time	Schedule Day	Date Last Updated	Destination
1	DONALD COU...	xls	Transaction...	Daily Transaction Report	06:00	Daily		E-mail

The status bar at the bottom of the application shows "Search Completed. Records Found." on the left, "(local) / acme" in the center, and "admin" on the right.