



# Memorized Reports

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## Introduction

The Edge Memorized Reports feature allows you to create a direct button for reports with commonly used presets. They differ from running reports using presets in that it actually creates a new report button that can be placed anywhere on the **Reports** menu. Memorized reports can be created from the **Presets** menu on any report filter. Once they are created, you can manage them from the **Administrative** menu. And you can even run a group of reports together from a single button.

### What Does This Mean to You?

If you have reports that you run repeatedly with the same parameters, they can be readily available from the **Report** screen without re-selecting options. For example, suppose at the close of every day, you run five reports for your bookkeeper. You might start by setting up each of the five reports as a memorized report. Then you can group them together to run without the filter. This document will show you how to do that.

## Memorizing Reports

To memorize a report:

1. From the **Reports** window, select the report that best models the report you wish to memorize.
2. Enter report parameters as you would for any report.
3. Do not select **OK** to run the report; go to **Presets** from the parameters window.
4. From the **Presets** menu, select **Memorize Report**. You will be prompted to add a report title and text for the report tab as it will appear in the **Reports** window.

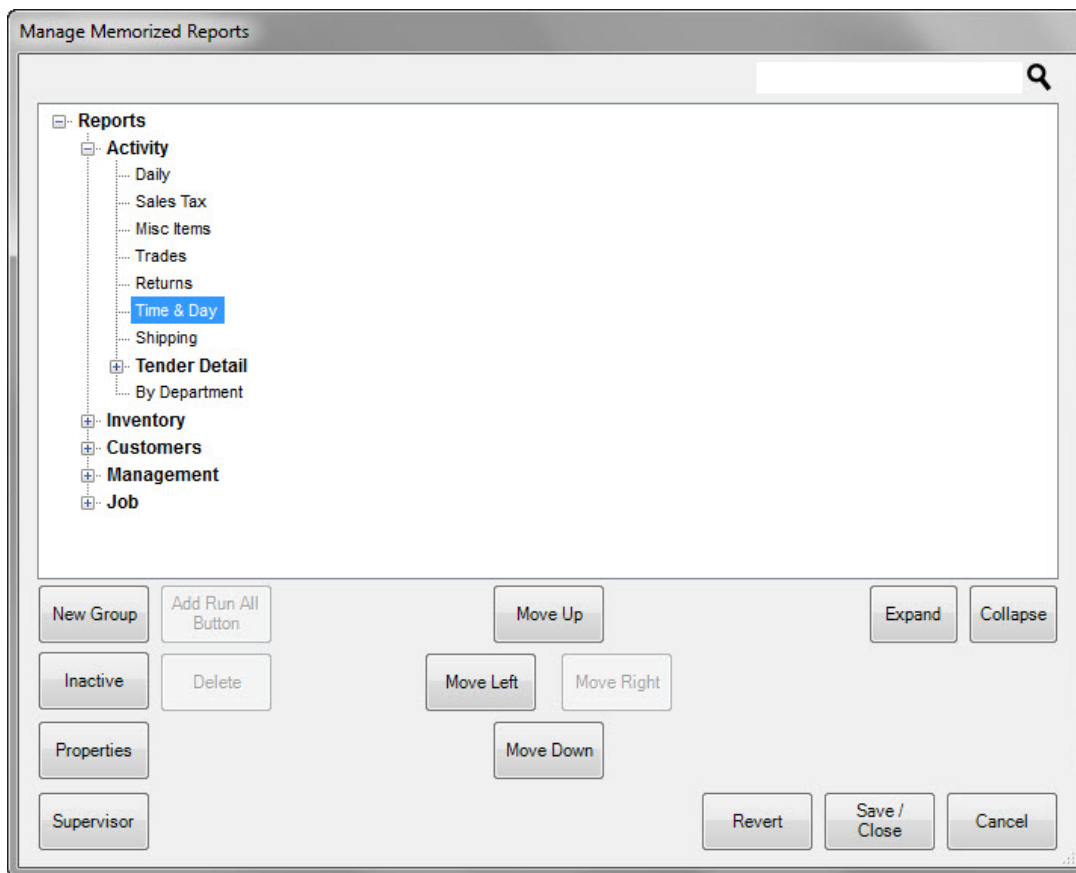
5. Enter the data as prompted.
6. If you wish to run this report the future without any manual prompting, select the option **Run Report without a User Interface**. This means the report will run without offering the **Report** filter.
7. From the **Output** drop-down menu, select the format for output:
  - Display Only
  - PDF Only
  - PDF & Display.
8. Select **OK**.

Once the report is memorized, you can run it just as you would pre-loaded reports from the **Reports** window.

## Managing Memorized Reports

Memorized reports appear in the **Reports** window navigation bar. By default, reports will be saved at the bottom of the **Reports** menu for that report section. For example, if you created a report based on any of the **Activity** reports, your memorized report will be saved at the bottom of the **Activity** reports list. To change how those items appear and manage other settings:

1. Select **Administrative ► Manage Reports Menu**. The **Manage Memorized Reports** window will appear.



The hierarchy of reports shown will mirror what is shown in the main **Reports** window. Also notice that the reports you created are in italics. What you arrange here is what will appear in the **Reports** window. Options in the **Manage Memorized Reports** window include:

- |                  |  |
|------------------|--|
| <b>Expand</b>    | Expands the hierarchy to show the whole list of reports. |
| <b>Collapse</b>  | Collapses the hierarchy to show only the top-level list. |
| <b>New Group</b> | Allows you to create a new category of reports.          |

**Add Run All Button** Allows you to add a button to the **Reports** menu to run all reports in that section.

**IMPORTANT!**

**This is a lot of reporting and will consume system resources for some time!**

**Inactive** Allows you to mark the report inactive so it will not appear in the **Reports** window. It is saved, however. You can mark it active at a later time.

**Delete** Deletes the report.

**Properties** Shows the settings for the button, but does not permit editing of the report filter.

**Move Up/Move Down/Move Left/Move Right** Allows you to move the memorized report button relative to others in the hierarchy. For example, to place a button in the **Activity** report section, move it up to the **Activity** section, select **Move Right** or **Move Left** to position it under a different level.

**Import** Allows you to import memorized reports exported by The Edge or other stores.

**TIP!**

**After importing a memorized report, they will appear at the bottom of the hierarchy in Imported Reports.**

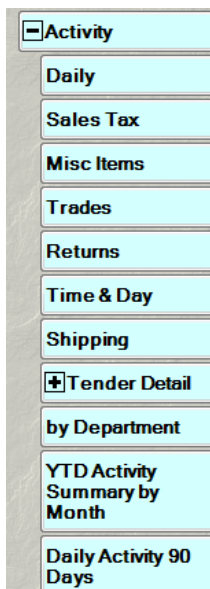
**Export** Allows you to export memorized reports for use in sharing with other stores.

**Revert** Reverts the hierarchy to the state it was in since the last save.

**Save/Close** Saves the changes made to hierarchy and closes the window.

**Cancel** Closes the window without saving changes.

2. Make changes to the structure as desired and select **Save/Close**. The **Report** will reflect that structure.

**NOTE!**

To erase memorized reports and go back to the pre-packaged reports, select **Administrative=>Manage Reports Menu=>Supervisor=>Reset Reports to System Defaults.**

## Creating Groups of Reports

To create a group of reports to run regularly:

1. Create reports to be run in the group. For each one, decide whether they should run without further filtering using the **Run Report without a User Interface** option.
2. Using the **Administrative ► Manage Reports Menu**, select **Create Group**.
3. Name the group as desired.
4. Using the **Move Up/Move Down/Move Right/Move Left** buttons, move the group to the desired location in the hierarchy, then move the newly memorized reports under the group.
5. Optionally, add a **Run All** button under the group.

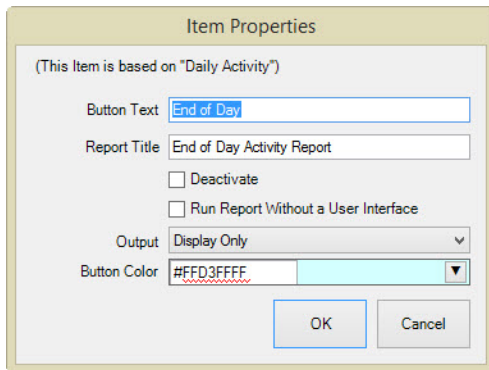
**IMPORTANT!**

**The Run All command will apply to the group under which it is located. If it is at the top of the hierarchy, it will run ALL!**

## Changing Report Button Properties

To change memorized report button properties (not report filters):

1. Using the **Administrative ► Manage Reports Menu**, select the report and select **Properties**.



2. Make changes as needed and select **OK**.

## Changing the Criteria of a Memorized Report

To change a memorized report:

1. Be sure the **Run Report without a User Interface** option is not turned on.
2. In the **Reports** menu, find and select the memorized report to be changed.
3. When the report filter appears, make changes as required.
4. Do not select **OK** to run the report. Select **Presets ► Set as Default**.
5. Select **OK** if you wish to run the report.
6. If desired, re-enable the **Run Report without a User Interface** option.

## Best Practices

- Running a large group of reports can tax system resources. You may wish to account for that in planning the run.
- When running a group of reports each report will perform a permissions check. If permission is not granted for one report, it will stop, but the queue will continue, running reports as permitted.
- If any report in a group exceeds a 5-minute run time, the next report in a group will prompt for permission.

## FAQs

**Question:** What if I set **Run Report without a User Interface**, but now need to see or change the filter?

**Answer:** Find the report from **Administrative ► Manage Reports Menu** and select **Properties**. From there, you can uncheck the **Run Report without a User Interface** option. Then you can go back and change the filter as described above.

**Question:** How do I save changes the report filter after it is memorized?

**Answer:** Select the report you wish to change with the interface option, make the changes to the filter, and from **Presets**, select **Set as Default**.