

AMS Online Reports Manual



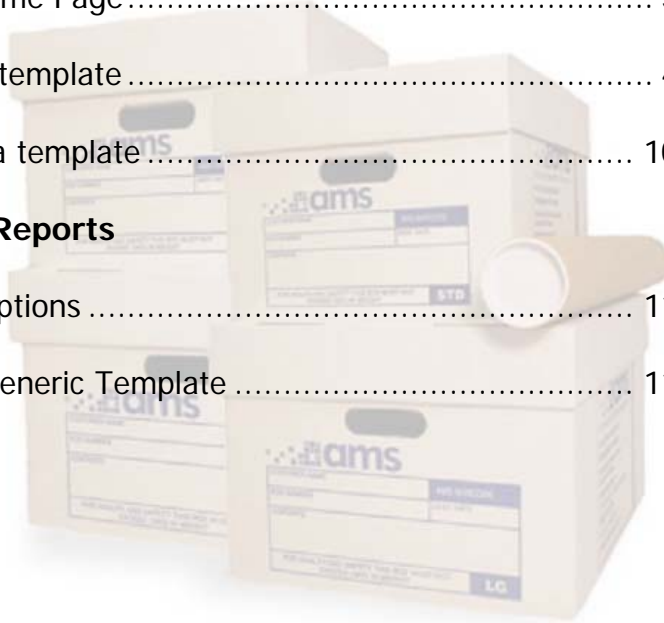
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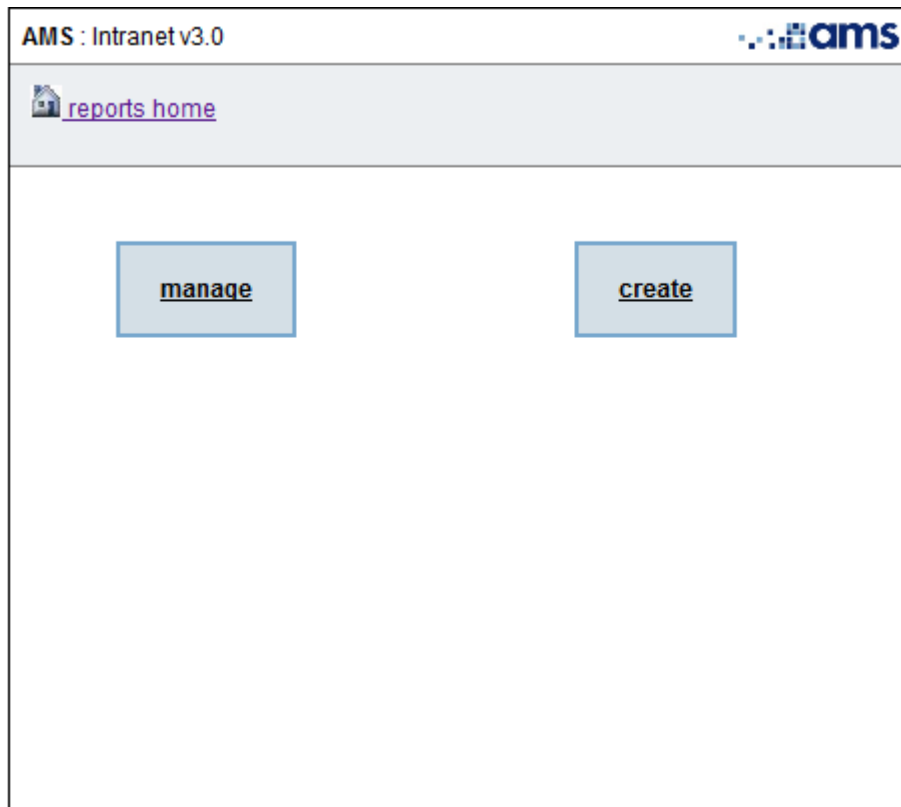
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Reports Home Screen



Select **Manage** to create your own custom template or update an existing report template.

Select **Create** to generate a report to an existing template.

AMS Generic Report Template

This template will generate a report to satisfy many customers. It will generate the following sections and fields:

Box Listing: AMS Box Reference, Customer Reference 1, Description, Destruction Date

Box Cataloguing: Index Value 1, Index Value 2, Index Value 3, Index Value 4

Creating a Report Template

Select **Manage** from the Reports Home Screen. Click New Template...

ID	Default	Account	Available to	Description
New template...				
107	<input type="checkbox"/>	Z00001	User	Box Details
108	<input type="checkbox"/>	Z00001	User	File Listings

You will then see the main edit template page:

AMS : Intranet v3.0

[reports home/manage/edit template](#)

Template Name:

Page Size:

Orientation:

This report is available to:

Section	Sort Column
New section...	

Template name – Box Details is the default name, you can simply type over this with your own name if required.

Page Size – You can choose either A4 (default) or A3

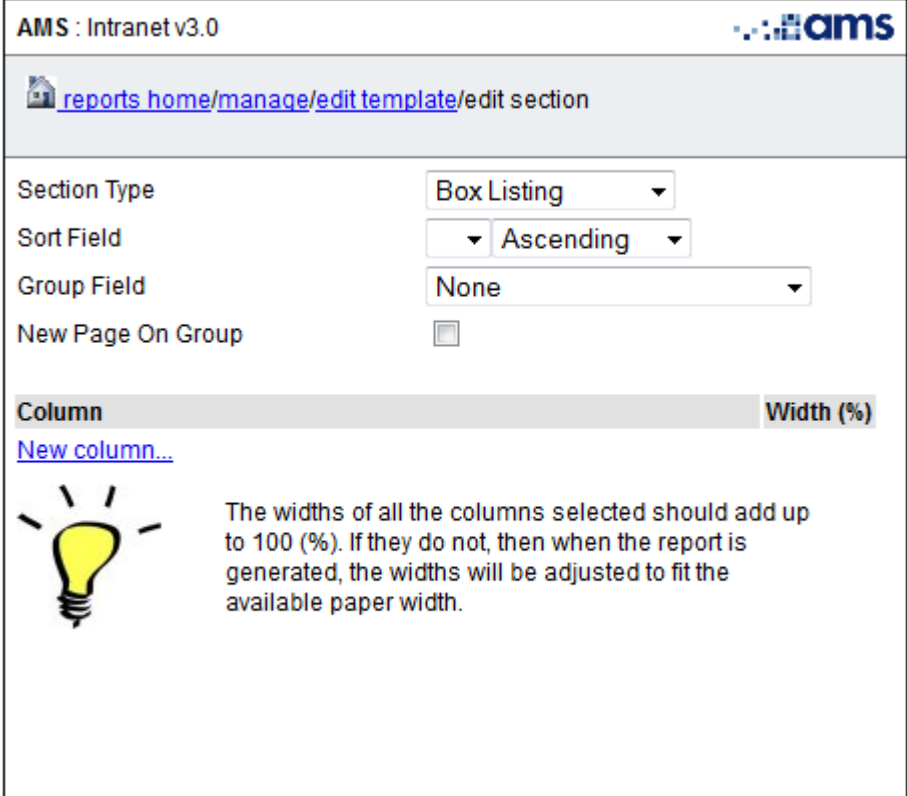
Orientation – Portrait or Landscape depending on your requirements. If you have long descriptions for your boxes and this is one of the fields you wish to display, or if you wish to see many columns of data then Landscape may be preferable.

This report is available to – Select Only me if you do not wish other Account Users to use your report template. All users means all online users for your Account.

You will then need to click **New Section** for each section of the report that is required.

Edit Section

If you only wish to display simple box information you may just need one section. More than one section will be required if you wish to show box information and file information separately.



AMS : Intranet v3.0 ams

[reports home/manage/edit template/edit section](#)


Section Type

Sort Field

Group Field

New Page On Group

Column	Width (%)
New column...	

 The widths of all the columns selected should add up to 100 (%). If they do not, then when the report is generated, the widths will be adjusted to fit the available paper width.

The **Edit Section** page is where you choose what type of information you wish to display.

Section Type – The choices here are Box Listing (default) and Box Cataloguing. Box cataloguing is only relevant if you have your files catalogued within your boxes.

Sort Field – Once you have selected your columns you can choose to sort by one of these. You don't have to select a sort column and if you don't your boxes will be sorted by the AMS Box Reference by default. You may wish to sort by description or one of your references if you wish to sort alphabetically or numerically, you can select either ascending (default) or descending.

Group Field –

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[reports home/](#)[manage/edit template/](#)edit section

Section Type

Sort Field

Group Field

New Page On Group

Column

[New column...](#)

[AMS Box Reference](#)

[Box Status](#)

The widths of all the columns will be adjusted to 100 (%). If they do not, then when the report is generated, the widths will be adjusted to fit the available paper width.

Here you can select to view your results in groups according to the selected field. For example you may have collections of boxes with different start dates that you wish to see together – in this case you would select Start Date from the drop down.

New Page On Group – Check the tickbox if you have selected a Group Field and wish to view each new group on a new page.

To select which columns you'd like in your report select **New Column...**

Edit Column

AMS : Intranet v3.0 ams

[reports home](#)/[manage](#)/[edit template](#)/[edit section](#)/[edit column](#)

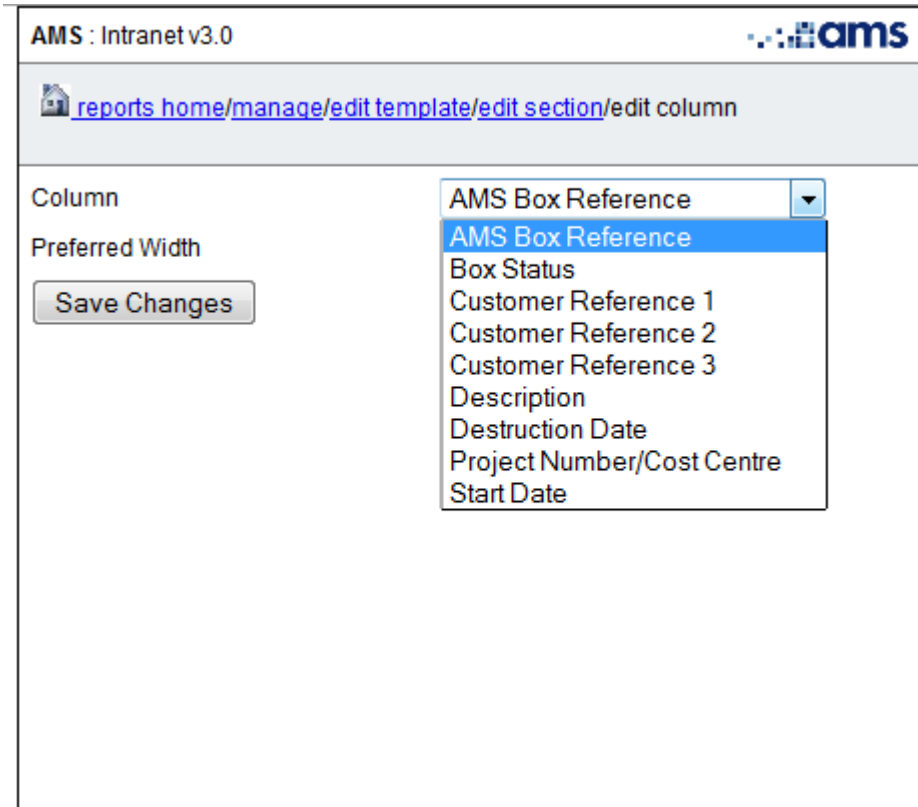
Column

Preferred Width

Column - here you can select which column you would like first on your report (in the Box Listing Section), you can see the fields available for selection in the image below.

Preferred Width – this value is a percentage of the width of the report. The above example is showing that the AMS Box Reference column should be 25% (a quarter) of the width of the report page.

If the widths of all columns do not add up to 100% then the widths will be adjusted to fit the available paper width.

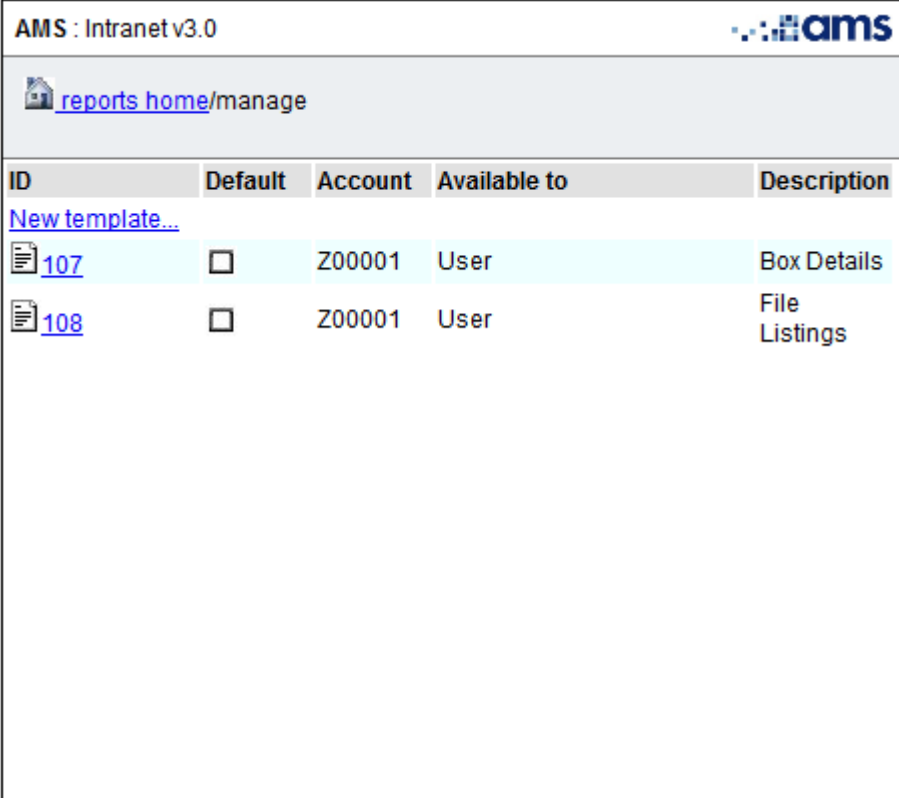




Save Changes – this will save your changes and take you back to the Edit Section page from which you can add more columns as required.

Once you have added all the sections and columns that you require, simply click Reports Home in the blue bar and click the Create button to run your report. (See page 11 for options available when running a report.)

Managing a Report Template

Select **Manage** from the Reports Home Screen. Select the report that you would like to manage/edit.



ID	Default	Account	Available to	Description
New template...				
 107	<input type="checkbox"/>	Z00001	User	Box Details
 108	<input type="checkbox"/>	Z00001	User	File Listings

All the options for managing a template are the same as for creating a new report template.

Creating a Report

Select Create from the Reports Home Screen to see the available options:

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[reports home/create](#)

Account Number

Project Number/CC

Report Template

Report Format

Status

Box Start Date ... to ...

Destruction Date ... to ...

End Date ... to ...

Box Reference to

Options

Projects/Cost Centres – If you have more than one cost centre then you can create a report for just one cost centre only. The default setting is to view boxes (and files) for all cost centres.

Report Template – Here you can select one of the AMS generic report templates or your own custom templates that you previously created.

AMS Generic Report Template

This template will generate a report to satisfy many customers. It will generate the following sections and fields:

Box Listing: AMS Box Reference, Customer Reference 1, Description, Destruction Date

Box Cataloguing: Index Value 1, Index Value 2, Index Value 3, Index Value 4

Report Format – Select either PDF (for Adobe Reader) or xls (for Microsoft Excel).

Status – You can select either live or retrieved boxes or both.

Box Start Date – This is the date that the box was first received by AMS. Use the pop up calendar button to select the to and from dates if you only wish to show boxes that came to AMS within a certain date range.

Destruction Date – This is the date that you have selected for us to destroy your box. Use the pop up calendar button to select the to and from dates if you only wish to show boxes that are due to be destroyed by AMS within a certain date range.

NB. If you choose to manually enter your dates rather than using the calendar selector then they must be in the format DD/MM/YYYY. To clear a date simply delete it from the field by clicking in the field and using your backspace or delete button.

Box Reference – This is the AMS box reference.

Once you have selected any required options/filters then click the **Create Report** button to generate your report. This may open in a new browser window or download to your computer depending on your browser settings.

Help! – Should you require any help generating reports (or templates) please contact AMS Storage Services on 0118 9439165 or storage@archivems.co.uk