



ICE Business System

Fixed Connections - Reporting

(Version – v2.0)

Learning Unit Guide

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I : Introduction

This Learning Unit Guide is reference-based, in that most of the information for the tasks can be found in the **Signature Learning Centre**.

This guide is designed as a workbook to be used during facilitator led learning. It includes instructional materials, descriptions of business processes and details of demonstrations to be undertaken by the facilitator.

There are references to **menu paths** for accessing the functions within **ICE** application and **SLC References** for locating additional information in the **Signature Learning Centre**.

II : Objectives

To provide detail on steps required to use the reporting function of the ICE Fixed Connections Module.

III : Target Audience

Back of house administrators and managers with a need to report on activity in the ICE Fixed Connections Module, including sales, payments and adjustments.

IV : Prerequisites

- Fixed Connections Reporting Activities

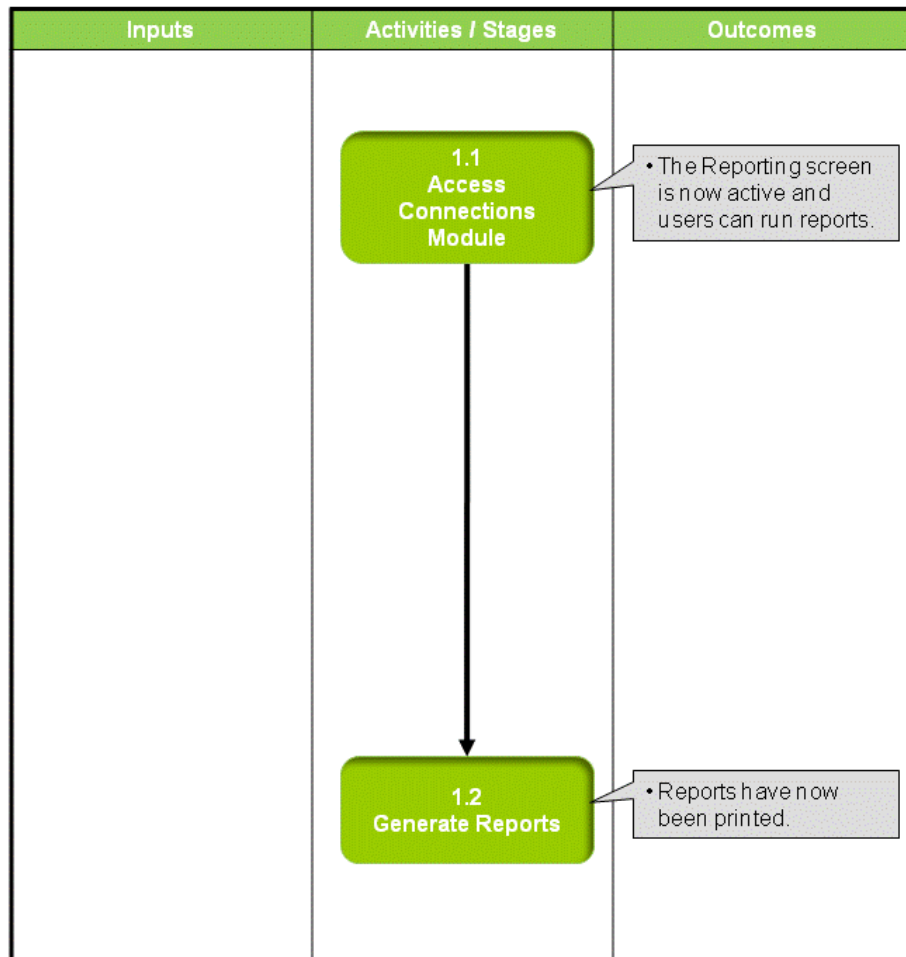
V : Scenarios

V.1 : General Reporting



Workflow

Workflow :	General Reporting
Scenario 1:	The reporting section of the ICE Fixed Connections module allows users to customise reports through the use of filters. This allows users to select certain types of product, specific customers or groups of staff to report on.



Scenario 1: General Reporting

The reporting section of the ICE Fixed Connections module allows users to customise reports through the use of filters. This allows users to select certain types of product, specific customers or groups of staff to report on.



1.1: Access Connections Module

Objectives:
<ul style="list-style-type: none"> Log in to the connections module in order to access reporting functions
SLC Reference:
<ul style="list-style-type: none"> ICE Business Systems > Fixed Connections > Reporting Activities > Reporting.

Work Instructions

Screen: ICE Main
<ol style="list-style-type: none"> Access CONNECTIONS. Select menu path: Operations > Connections > Fixed Connections or The Fixed Connections icon.
Screen: Enter Access Code
<ol style="list-style-type: none"> Enter your Access Code and press OK.
Screen: Select Branch
<ol style="list-style-type: none"> Select the appropriate Branch from the drop-down menu. Press OK. Note: <i>If your system has only one Branch set up you will not be required to select a Branch.</i>
Screen: Connections Main
<ol style="list-style-type: none"> Click the Reports icon on the left of screen.

Outcomes:
<ul style="list-style-type: none"> The Reporting screen is now active and users can run reports.
Notes:
<ul style="list-style-type: none"> Access to areas within the Connections Module is set by your system administrator. If you do not have access to required areas see your system administrator.



1.2: Generate Reports



Objectives:

- Select parameters to reports on and generate reports.

SLC Reference:

- ICE Business Systems > Fixed Connections > Reporting Activities > Reporting.

Work Instructions

Screen: Reporting - Main

1. On the left of screen, click the type of report you wish to run.
 - **Sales Activity:** Displays detail of the quantity and dollar value of sales of fixed equipment and services.
 - **Reconciliation Activity:** Displays financial details of adjustments made to services and amounts that remain outstanding.
 - **Payment Activity:** Displays details of payments received for the sale of fixed services and the allocation of those payments.
 - **Connection Activity:** Displays non-financial summary of types of fixed connections that have been processed.
2. In the middle area of the screen, highlight the specific report you wish to run.
3. Select a period to report on by selecting a **Report Period** and **Date:**
 - **Day:** reports on the specific day entered in the **Date** field.
 - **Week:** Reports on a one week period starting from the **Start date** selected.
 - **Month:** Reports on a one month period starting from the **Start date** selected.
 - **Date Range:** Reports from the date entered in the **Start Date** field to the date entered in the **End date** field inclusive.
4. Use the **Report Type** toggle to select the level of detail required in the report.
 - **Summary** reports will show grouped totals for the selected data.
 - **Detailed** reports will show the individual transactions that make up those totals.
5. The report chosen at step 2 will determine which filters are available for selection. Click on the tab containing the criteria you wish to specify. For example: **Staff, Connection Types** or **Commission Type**.
6. Click the radio button for **Selected {data type}**, for example: **Selected Staff** or **Selected Customer**.
7. Tick any data type that you wish to include in your report.



<p>8. Repeat steps 5-7 for each data type that you wish to specify for the report.</p> <p>9. Click Run Report.</p>
<p>Screen: Output Options</p>
<p>10. Click OK to preview the report.</p>
<p>Screen: Report Preview</p>
<p>11. Click the Printer Icon.</p> <p>12. Click OK to send the report to the default printer, or select a different printer by:</p> <ul style="list-style-type: none"> ○ Clicking Setup. ○ Selecting from the list of installed printers. ○ Clicking OK. <p>13. Click the Door Icon to return to the main reporting screen.</p>
<p>Outcomes:</p>
<ul style="list-style-type: none"> • <i>Reports have now been printed.</i>
<p>Notes:</p>
<ul style="list-style-type: none"> • <i>N/A</i>