

Frequently Asked Questions

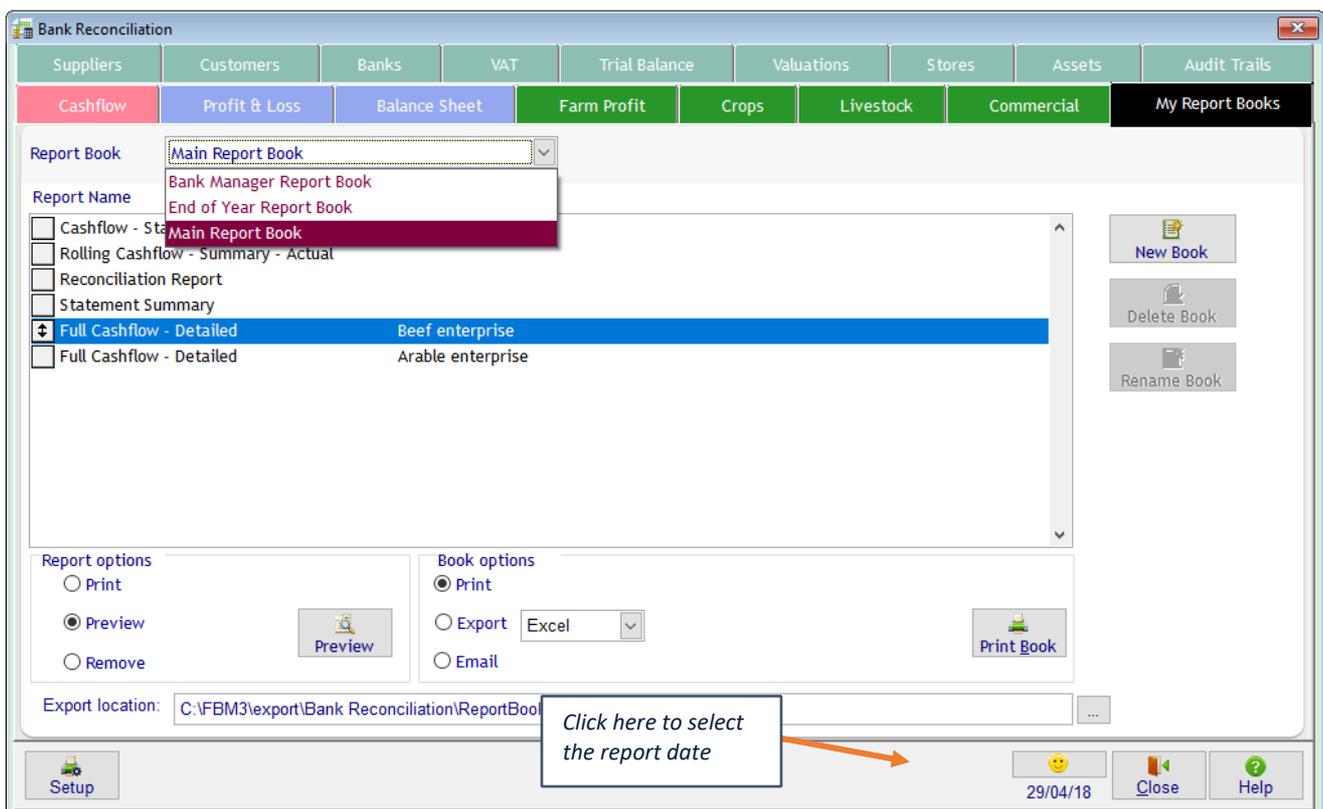
My Report Books - Business Manager

Part of
Proagrica

My Report Books is a tab within the Report Library of Business Manager. *It is not available for Cash Manager and Cash Focus Users.*

Selections of reports can be grouped together to form a Report Book to allow them to be printed, exported or emailed at once without having to specify each report individually. This saves time and can act as a reminder of reports you find useful, such as Month End Reports or Farm Management Reports.

One default Report Book will already exist, 'Main Report Book', which cannot be renamed or deleted. It is possible to create or delete new Report Books at any time.



Creating a report book

On the Top Menu go to Reports, Report Library.

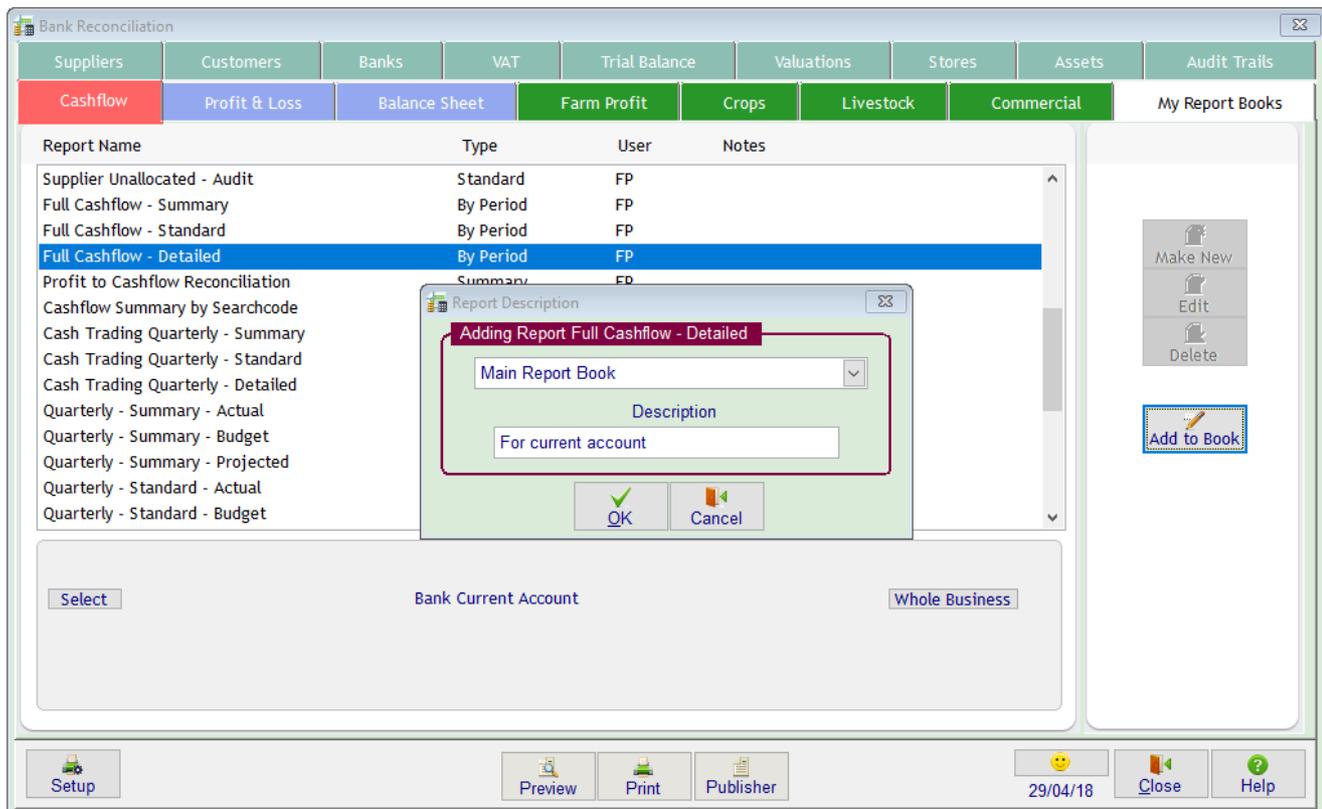
Click on the tab My Report Books.

Click on New Book.

Enter the name of your new Report Book and click OK.

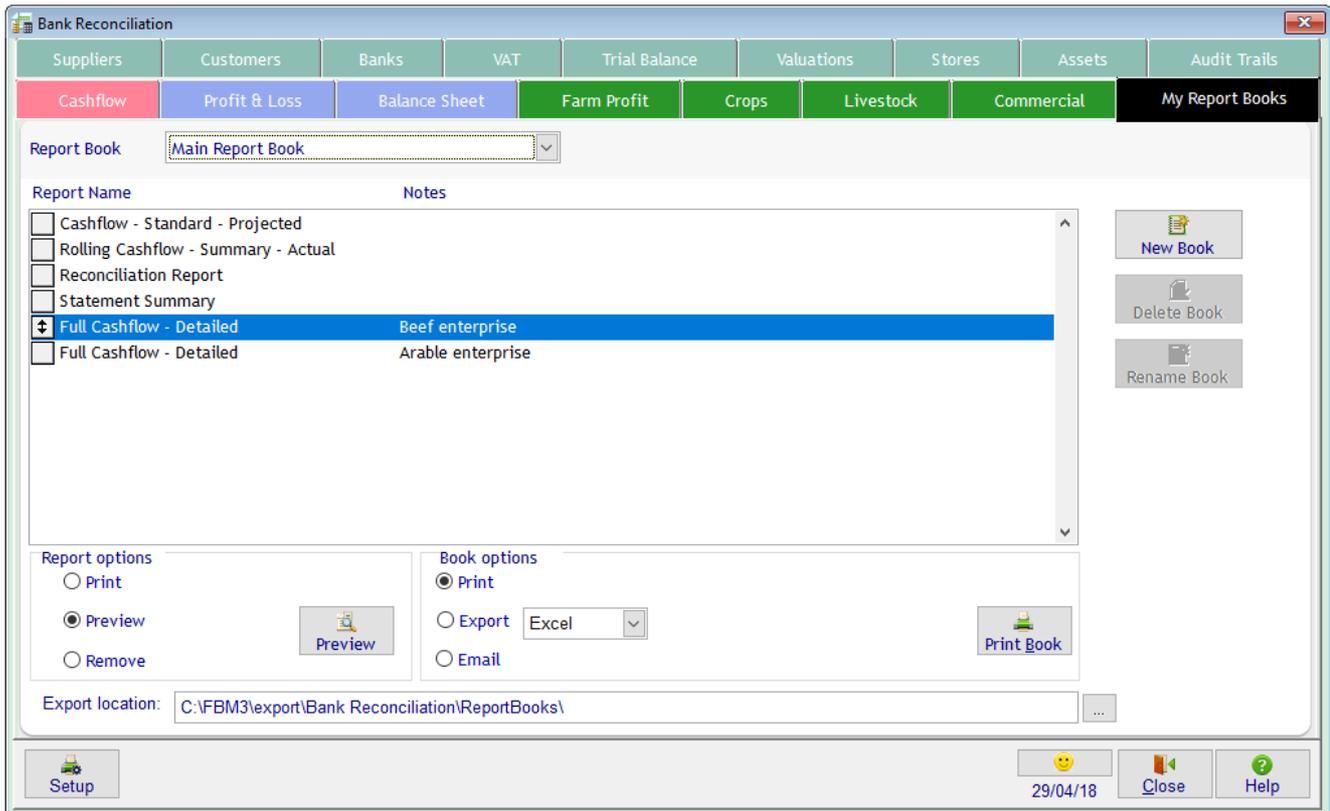
Adding reports to a book

Reports are added to Report Books from within the other tabs of the Report Library, e.g. Full Cashflow – Detailed is in the Cashflow tab. Highlight the report you wish to add, specify any filters or ranges required and click on the Add to Book button on the right of the screen.



When adding reports you have the chance to enter notes. These are especially important if you add more than one instance of the same report to ensure you can distinguish between them. When a Report Book is exported, or emailed, the files are given the same name with the notes at the end, e.g. Reconciliation Report Petty Cash.

Reports can be re-ordered by clicking in the grey box to the left of a report's name and holding down to drag the report up or down to the desired position.



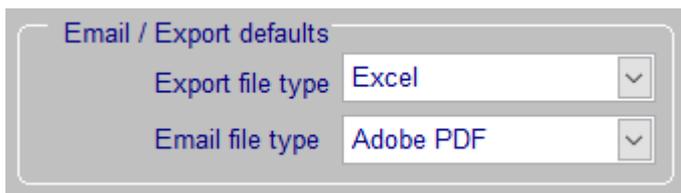
Individual reports can be printed, previewed, or removed from the Report Book by right clicking on their name.

Book Options

The whole Report Book can be printed, exported, or emailed. Take note of the calculated date at the bottom of the screen and change this if wishing to report up to a certain date.

Reports are printed in the order they are arranged on screen.

When the book is exported, or emailed the default file format is selected in Tools, Options, as below:



When exporting check the export location at the bottom of the screen, this can be changed by clicking on the button with three dots to the right of the location and browsing to the desired one. Each report is exported to a subfolder with the name of the Report Book to this location with the report name and any notes where appropriate.

When emailing the Report Book initially all of the reports are exported and are then attached to an email that opens when the export is complete. The recipient's details and any notes can then be added to the email before it is sent.