



Eaco: Reporting Module

USER GUIDE

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ESTABLISH, ACT,
COMMUNICATE AND
OPTIMISE

1. REPORT TYPES

Important Notes:

The Eaco IT department have developed each Report Type and the attributes associated with each report: 1. Filters 2. Options 3. Dimensions 4. Metrics and 5. Order. Note that not every Report Type requires all five attributes and further, the Eaco IT department specifies to what file format a report may be exported.

Report Type Attributes:

1. **Filters** - Starting from a complete data set, Filters are applied to narrow down the results to a more specific data set (e.g. all jobs created in a date range or all jobs tagged something, or all jobs in a specific category). Multiple Filters can be selected based on the desired level of narrowing down results. Likewise, multiple values of a Filter can be selected, which will enable results to be narrowed down on the basis of one criterion **or** more.

Example of applying Filters multiple values of a Filter: a Job has to 1) have been created in the last week AND 2) be posted to the X Supplier Network AND 3) be tagged "melbourne" OR "sydney" AND 4) have category Plumbing OR Electrician OR Handyman

2. **Options** - Options are essential configuration settings that need to be established to enable a report to be run successfully. Without the configuration of Options, a Report cannot be run.

Example: an Option may be mandatory Filter (e.g. this report cannot run without a Reporting Period so it is an Option instead of a Filter). Options may also specify ways of Grouping data (e.g. Frequency: Day or Week or Month or Year), which are most commonly used in conjunction with Metrics.

3. **Dimensions** - Dimensions should be established in order to determine what fields to output in the report. If the Report Type has a CSV/table output format, then a Dimension would be a Column of the table/spreadsheet being produced. Reports will fail to run if you don't specify at least one Dimension.

4. **Metrics** - Metrics are like Dimensions but are more a collation of data and are used in conjunction with Options.

Understanding Options and Metrics: Option = Frequency: Day; and Metric = Number of Jobs.

Option = Reporting Period: 2020-01-01 to 2020-01-10 would produce a report on the number of jobs for each Day between 1st and 10th of January ultimately enabling you to collate the number of jobs posted each day for each of those 10 days.

5. **Order** - this enables you to order or sort the results of your report.

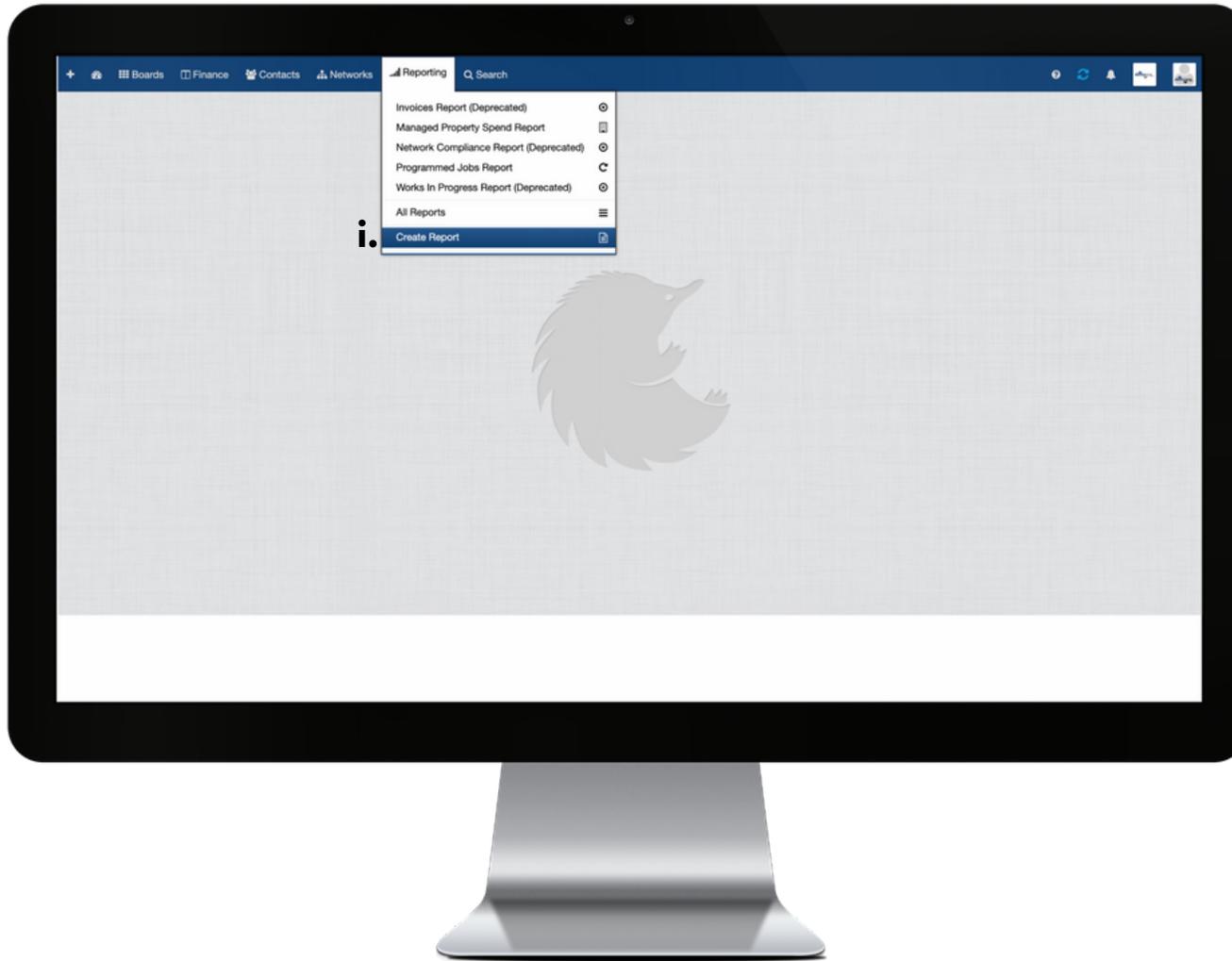
Access will depend on your Eaco subscription level and the relevance (i.e. access to different Report Types are granted to Clients by Eaco Admin. Some are relevant to Job/Network Owners, some are only relevant to Suppliers).

To date, the following is a list of the Report Types that have been developed by the Eaco IT department. If any of these Reports are not available via your Eaco subscription, please contact your Eaco Account Manager to enquire on what options exist, if applicable, to grant you access:

- Asset List
- Client Work Log List
- Compliance List
- Devices List
- Inspection List
- Invoice Analytics
- Invoice Line Item List
- Invoice List
- Job Analytics
- Job Feedback List
- Job List
- Job List by Supplier
- Leads List
- Multi Job Invoice Job List
- Programmed Maintenance (PM) Jobs
- Profile Job Stats
- Provider Compliance
- Provider Cost List
- Provider List
- Quote List
- Task Result JSON Report
- User List

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2. GET STARTED

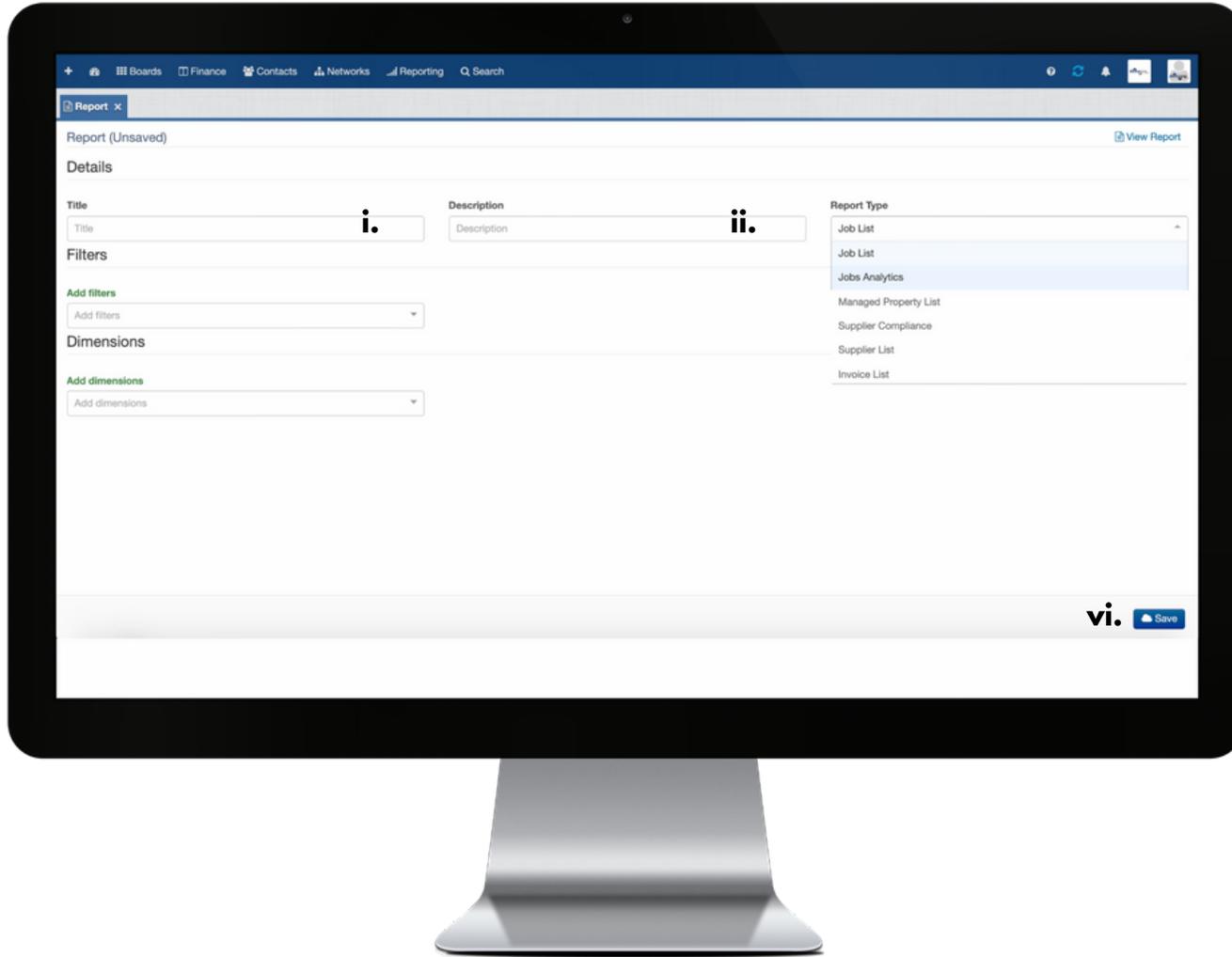


Your organisation's Reporting module, which is accessible as a main menu item of the Eaco Control Centre's navigation bar, contains a section dedicated to creating reports.

i. Click Create Report and this will direct you to establishing the configurations of the report you wish to create.

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3. CREATE A REPORT



General Notes:

The screen shot displayed on the previous page is just a sample view it is not necessarily representative of the Create Report view every Eaco subscriber will see displayed.

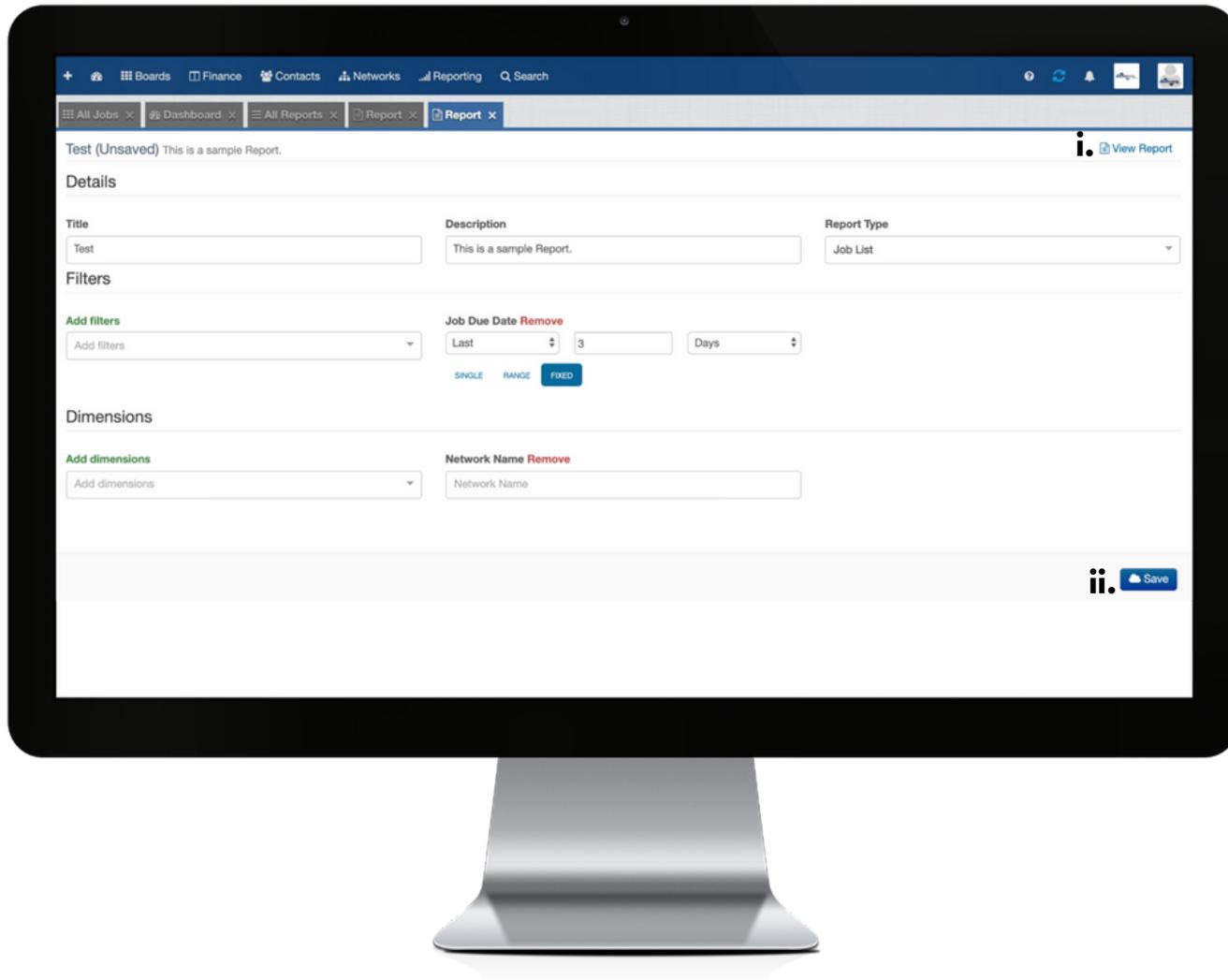
It is not necessary to Save a report to run it just toggle between "View Report" and "Configuration". You only need to Save if you want the configuration saved for recurring use.

Further, Title (i.) and Description (ii.) are also not needed, however, Title and Description should be entered if the User is going to Save the report.

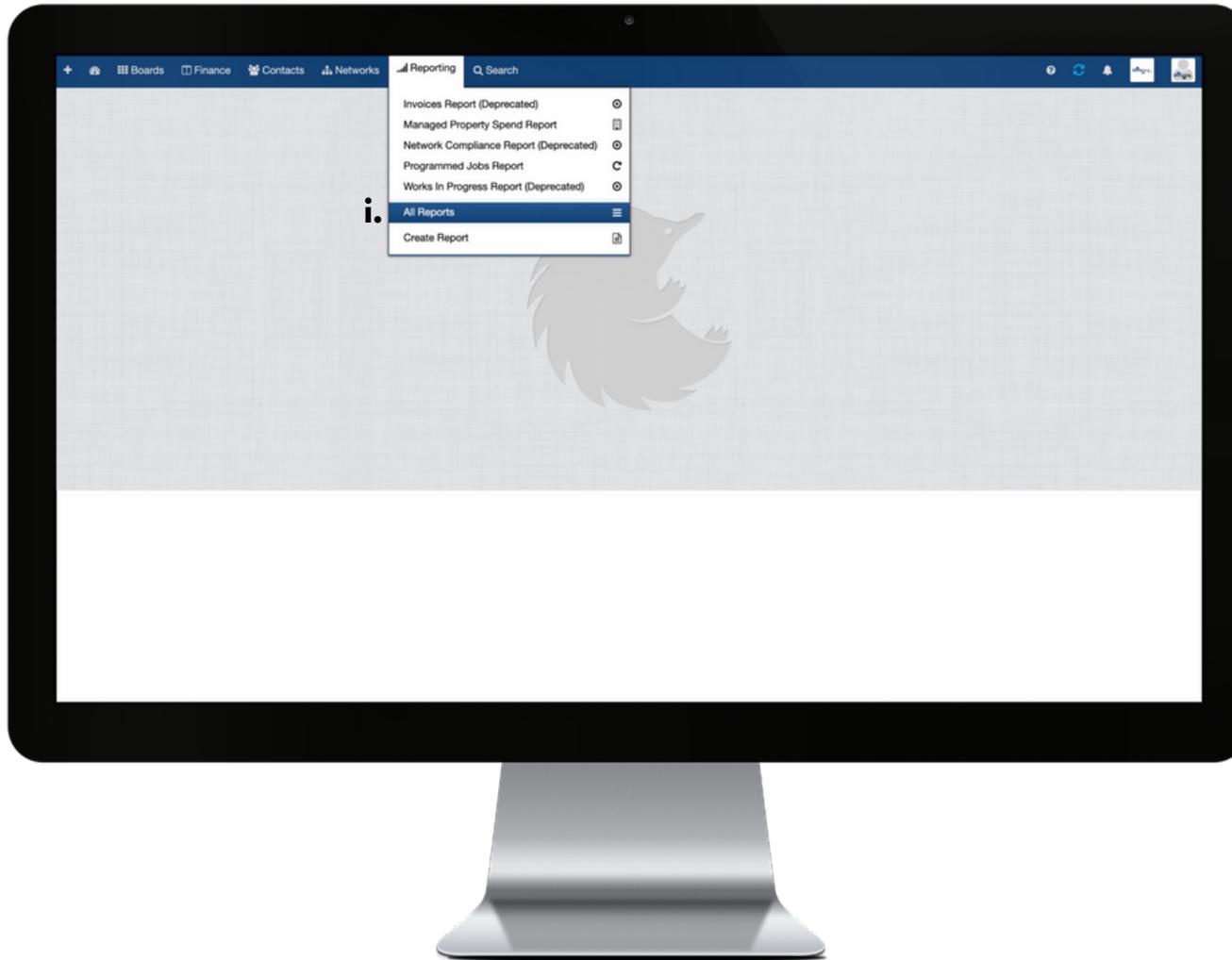
Should a report be saved, a User, from within the All Reports list, can duplicate or delete a report; view to edit configurations and/or run; download to straight out run and output the file; share with organisation (this makes the report available to everyone in your client with the reporting permission); display in menu (this adds the saved Report Type to the top of the Reporting Module's menu within your Organisation's Eaco Control Centre (double click on the menu heading to refresh it).

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4. RUN A REPORT

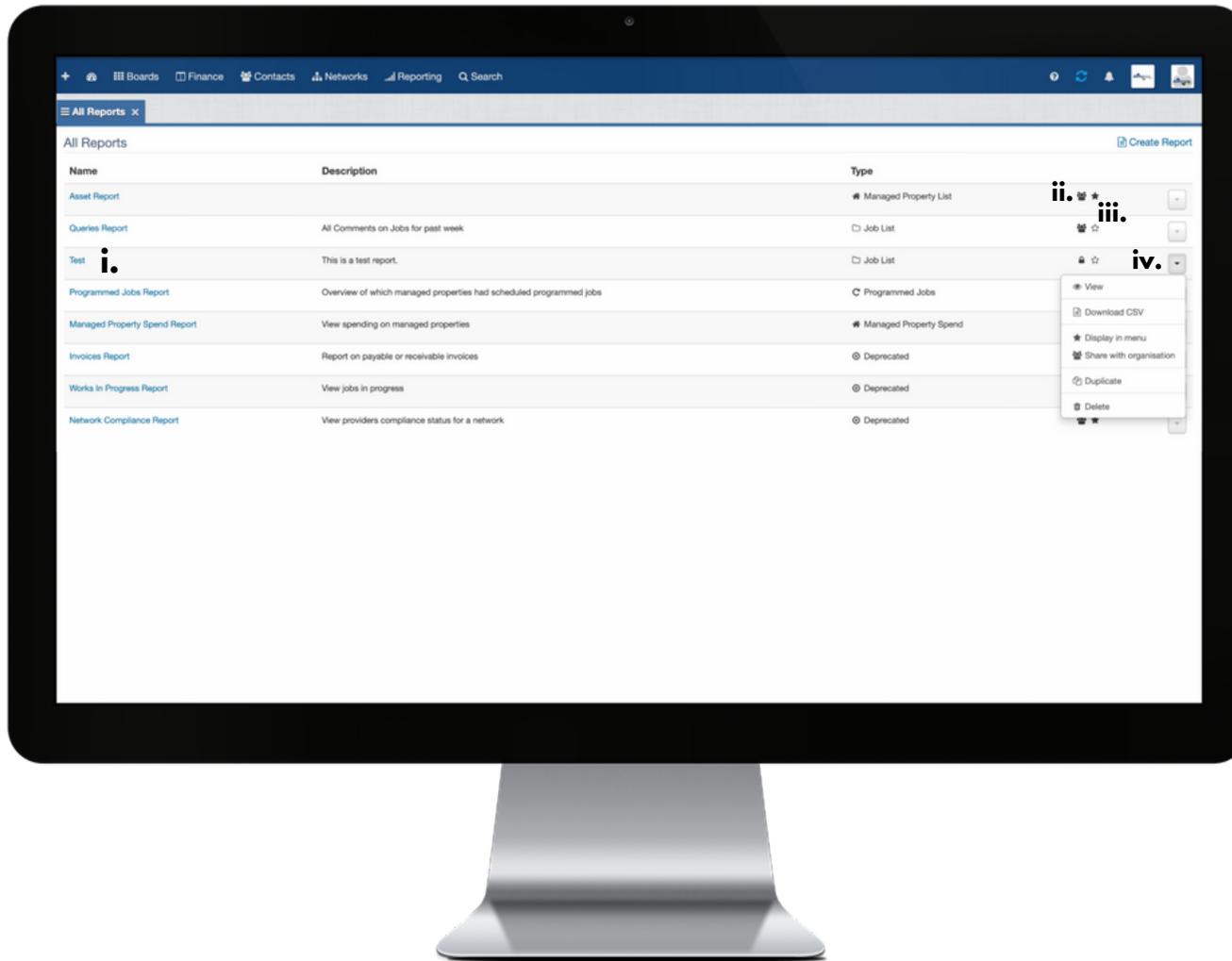


- i: Upon establishing the configurations for the report, click View Report to run it.
- ii. Click here to Save the configurations should you wish to run this as a recurring report. Upon saving, the Report it can be retrieved from within the All Reports section of the Reporting Module (see following page).



i: Click All Reports from the Reporting menu of your Eaco Control Centre and this will display your All Reports Register (see following page).

Note: the All Reports Register will consist only of Reports you have configured to run (i.e. to produce reporting results). Upon running a report , you will have the option to download the results to save as you see fit.



Screen view of the **All Reports Register**, which lists all reports that have been established to run more than once (reports that have been run as a one-off will not save and hence, will not appear in the All Reports Register).

Continue to the following page for details on what the icons represent and on the actions you can take when you are on the All Reports Register screen.

- i.** To run an establish Report, click on the Name.
- ii.** This icon represents that the Report has been shared to enable access by any of your user's that have been granted permission to use the Reporting Module. Sharing can be disabled by making the Report "Private" - see further down (iv.) for details.
- iii.** A filled star represents that the established Report will be listed (displayed), for quick retrieval from within the Reporting Module's main menu, found in your Eaco Control Centre's dark blue navigation bar at the top of the screen. To set the report so that it isn't displayed in the menu of the Reporting Module, select the "Hide from menu" option from the drop down menu - see below (iv.) for details. In this instance, the star will revert to an unfilled star.
- iv.** The drop down menu contains the list of actions you can take in relation to the respective report:
 - View the report
 - Download the report
 - Display/hide the report from being listed in the Reporting Module's menu accessible from the Control Centre's dark blue navigation bar.
 - Share the report with your organisation/make the report private
 - Duplicate the report
 - Delete the report