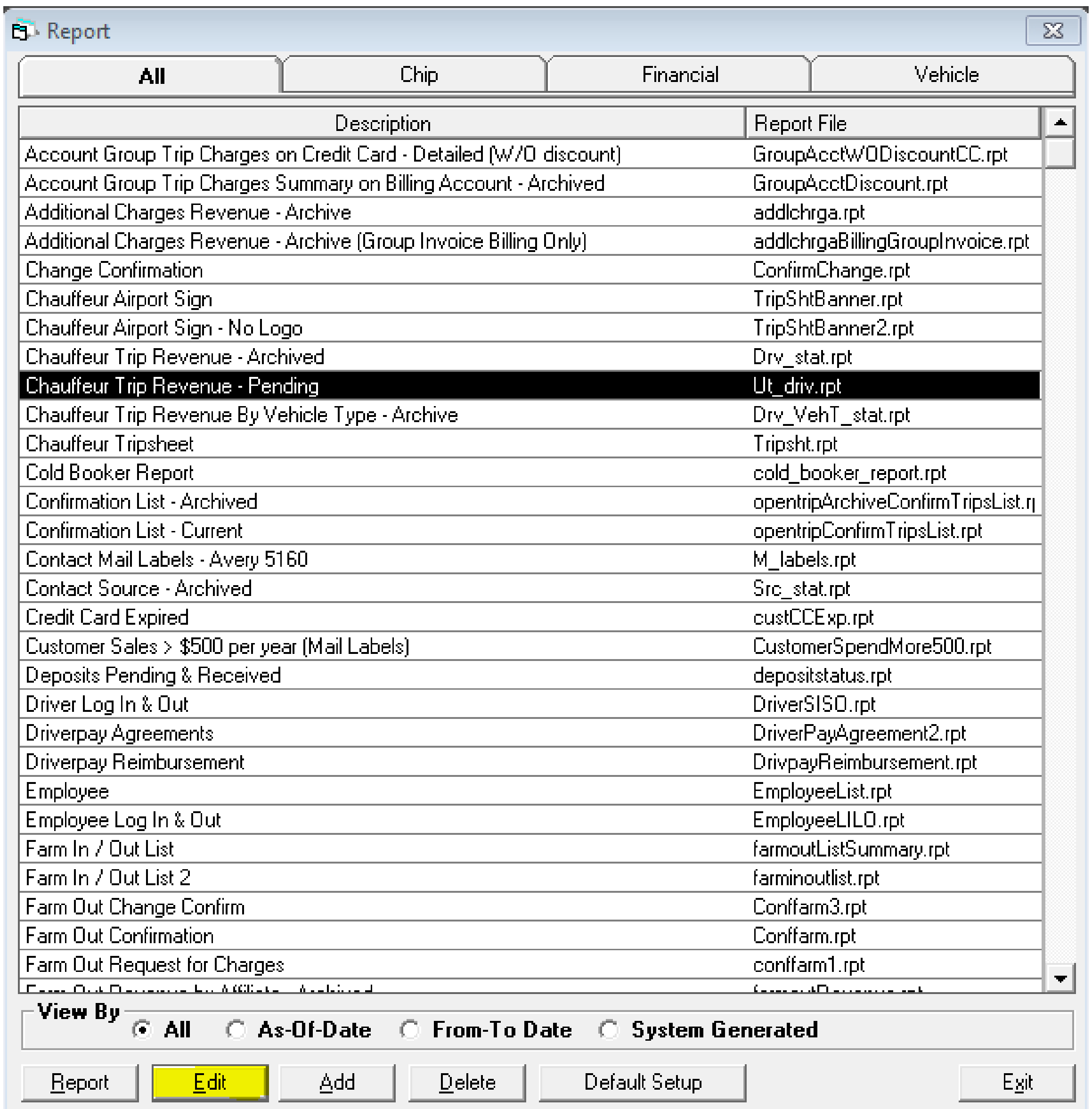
Tech Tip Tuesday—January 7, 2014
by Chip Bowman

Happy New Year! We hope to see many of you in Las Vegas—our annual user's meeting is Saturday, February 15 from 2pm to 4pm in Room 117.

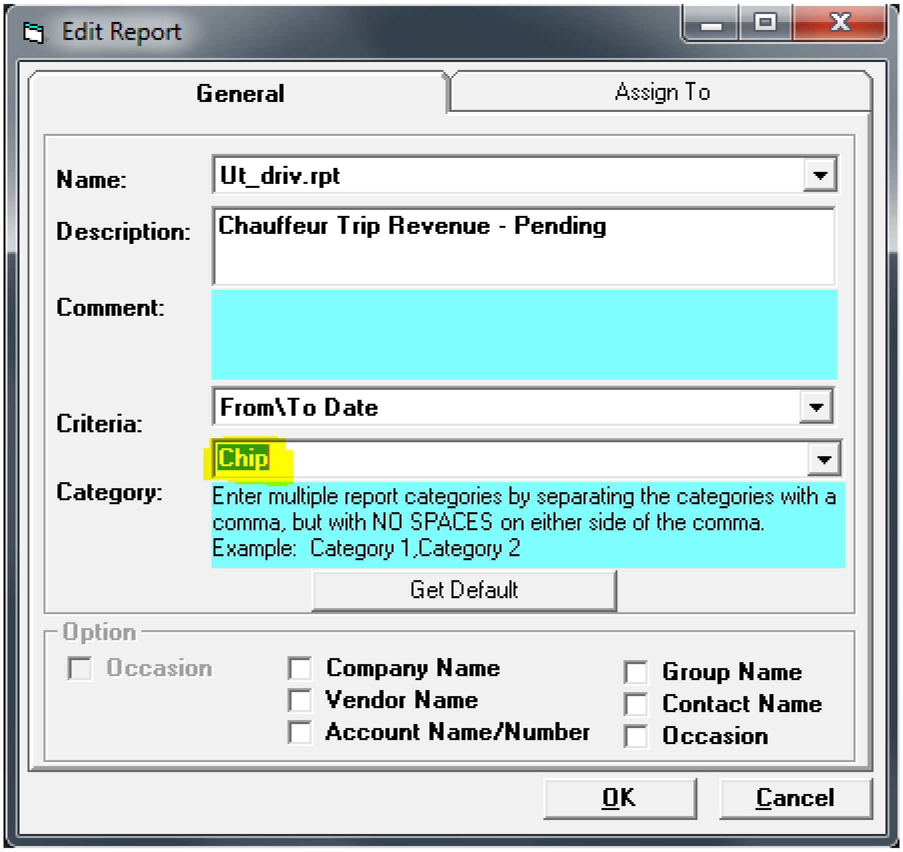
Reports

Having trouble finding that report you only run once a year? Do you have a series of reports you run weekly, monthly or for a specific function? With report categories, you can quickly and easily categorize any of the tons of Livery Coach reports for fast and easy access.

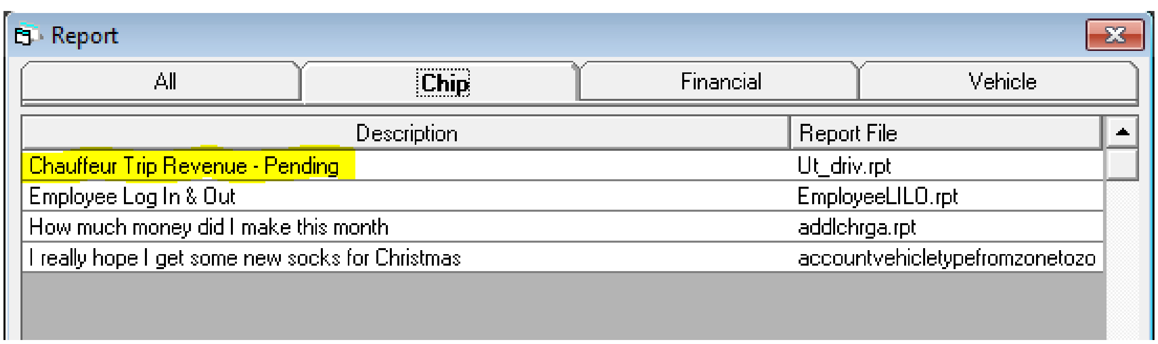
To create a category and put that report in the category, simply open Maintenance…go to Maintain…Reports…List…and select the report you would like to categorize.



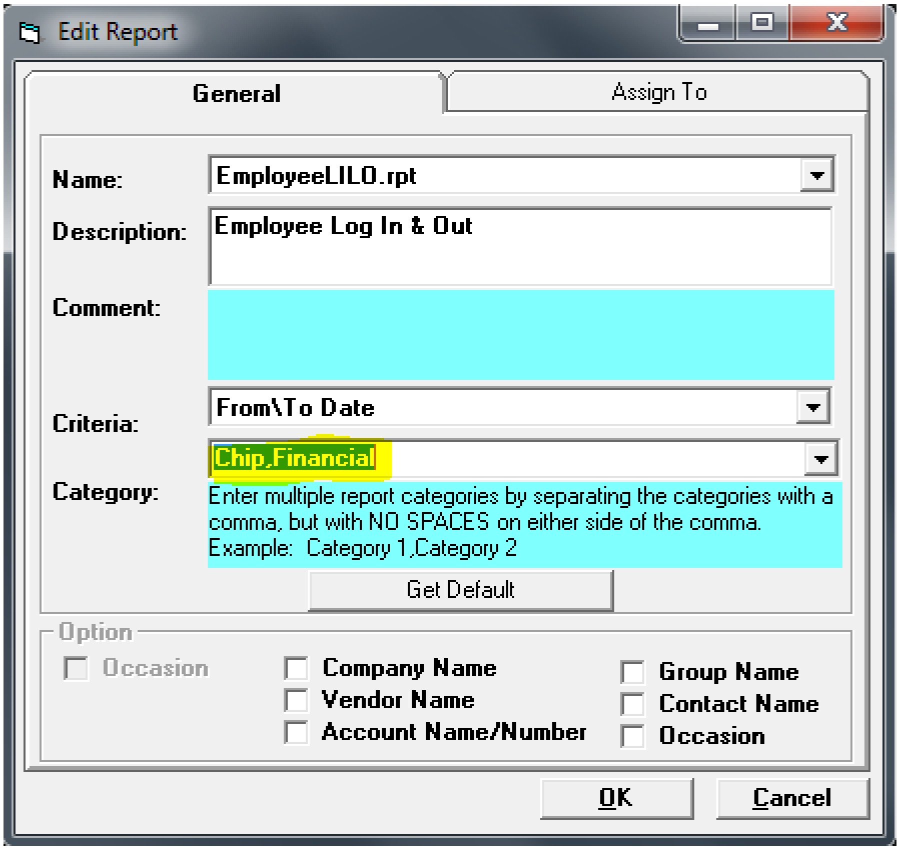
In the "Category" field, enter the name of the category you would like to create, and then Click OK.



Your report is now part of the new category, and can be selected from its own tab.



If you want a report to exist in more than one category, just add a comma and the new category name. (Do not add a space after the comma)



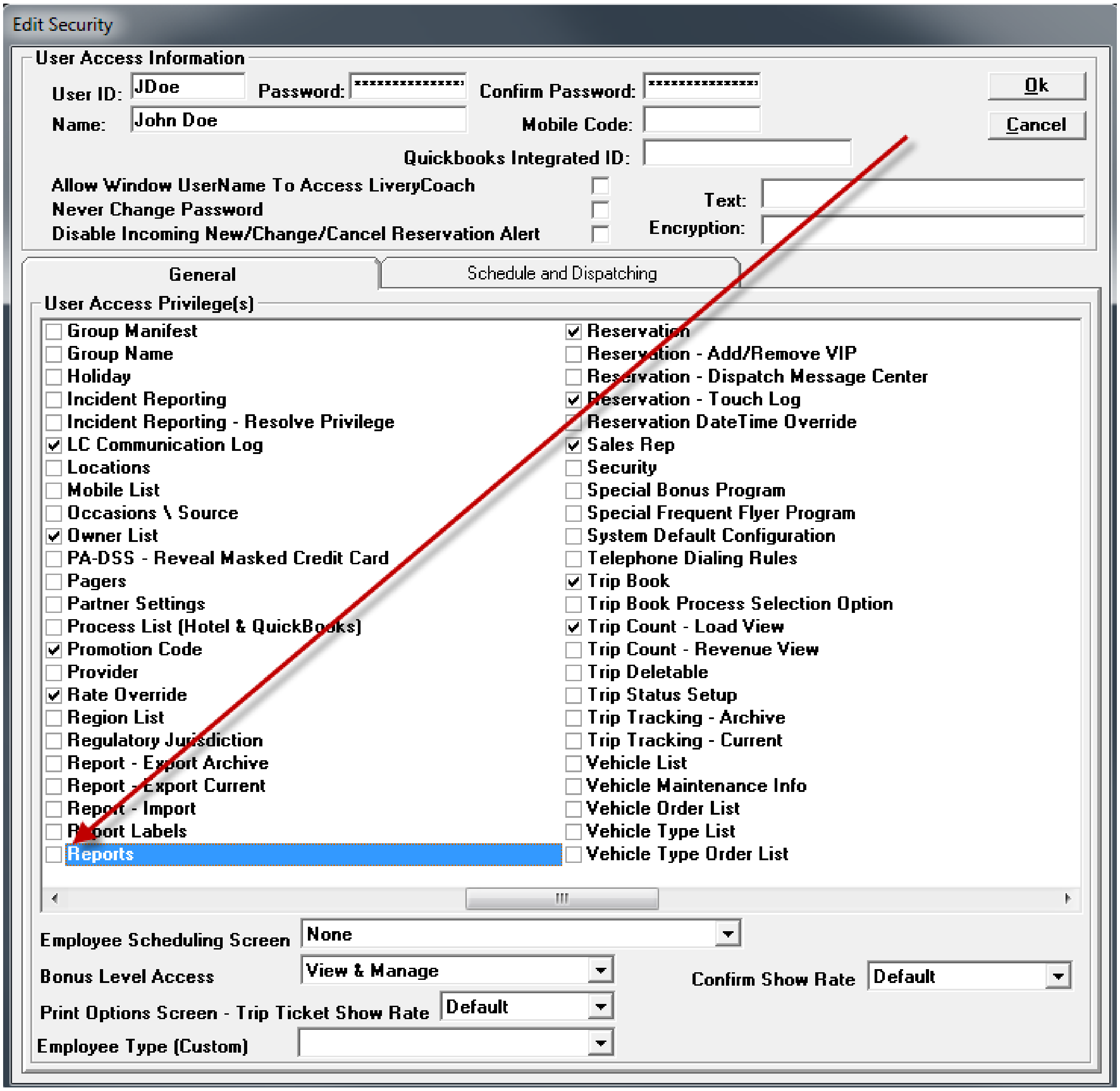
There is no practical limit to the number of categories a report can be in, so have at it.

Bonus feature for those that are still reading......

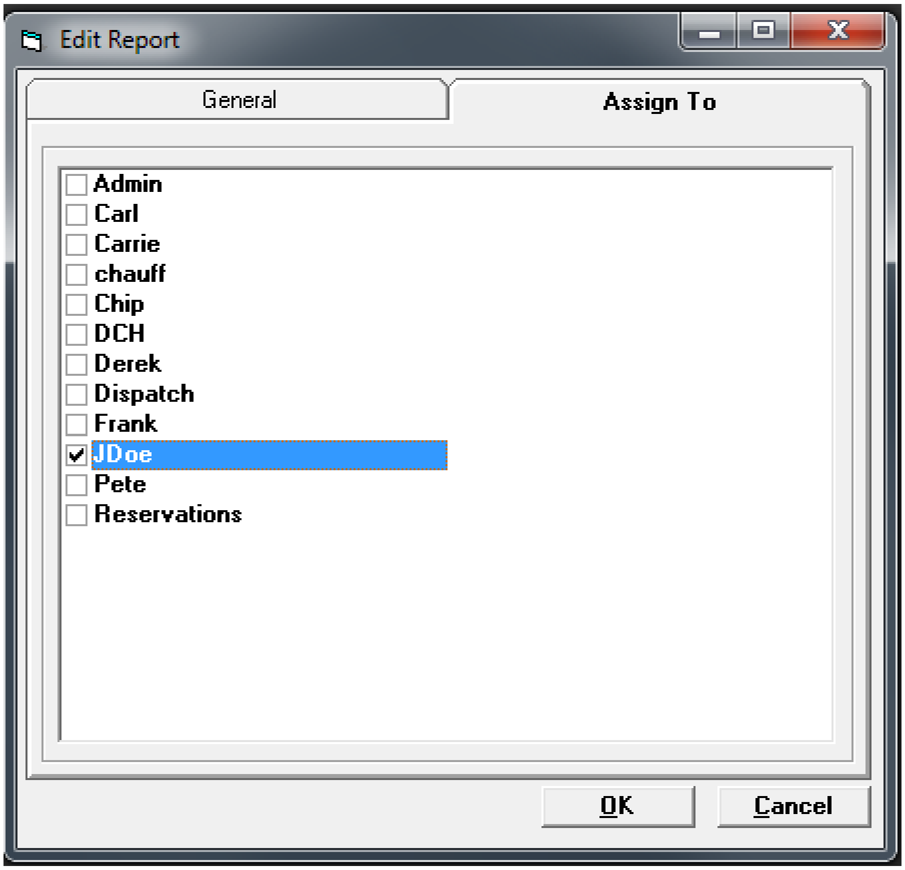
Access to the reports menu is a security setting. Users with this setting have access to all reports, including ones with sensitive financial data. In the last tech tip, you learned how to search through the various security settings and determine which users have access to a specific function, now you can learn a new way to apply this knowledge.

Suppose you have a user that only needs to print the vehicle wash list, or the driver login/logout report. Granting full access to the user would give access to all reports, but with the "assign to" function you can select specific reports to appear in the users report menu.

First, make sure the user does *not* have security access to reports, as shown below.


Edit Security
User Access Information
User ID: JDoe
Password: ***************
Confirm Password: ***************
Ok
Cancel
Name: John Doe
Mobile Code:
Quickbooks Integrated ID:
Allow Window UserName To Access LiveryCoach
Never Change Password
Disable Incoming New/Change/Cancel Reservation Alert
Text:
Encryption:
General
Schedule and Dispatching
User Access Privilege(s)
Group Manifest
Group Name
Holiday
Incident Reporting
Incident Reporting - Resolve Privilege
LC Communication Log
Locations
Mobile List
Occasions \ Source
Owner List
PA-DSS - Reveal Masked Credit Card
Pagers
Partner Settings
Process List (Hotel & QuickBooks)
Promotion Code
Provider
Rate Override
Region List
Regulatory Jurisdiction
Report - Export Archive
Report - Export Current
Report - Import
Report Labels
Reports
Reservation
Reservation - Add/Remove VIP
Reservation - Dispatch Message Center
Reservation - Touch Log
Reservation DateTime Override
Sales Rep
Security
Special Bonus Program
Special Frequent Flyer Program
System Default Configuration
Telephone Dialing Rules
Trip Book
Trip Book Process Selection Option
Trip Count - Load View
Trip Count - Revenue View
Trip Deletable
Trip Status Setup
Trip Tracking - Archive
Trip Tracking - Current
Vehicle List
Vehicle Maintenance Info
Vehicle Order List
Vehicle Type List
Vehicle Type Order List
Employee Scheduling Screen
None
Bonus Level Access
View & Manage
Confirm Show Rate
Default
Print Options Screen - Trip Ticket Show Rate
Default
Employee Type (Custom)

Next, select the desired report, click edit and then select the "assign to" tab. Assign the report to the desired user(s) by adding a checkmark next to the username, then click ok.



The next time the user logs in to reservations and access the reports menu (under view) they will only see the reports you have assigned to them. (Note that if a user does not have the Reports security checked, and has NO reports assigned, then the Reports menu item will not appear.)