XLS Report Wizard Quick Start

Need:

- V7 polling must be installed.
- A machine should already be setup in V7 polling. It is best to have already done a Save All Program prior to using the XLS Wizard.
- There should be reports in the Polling software since we query the reports to generate the new Excel® files.
- Excel® must be installed on the PC to edit and view the output files. The files can be viewed with Open Office® if desired.
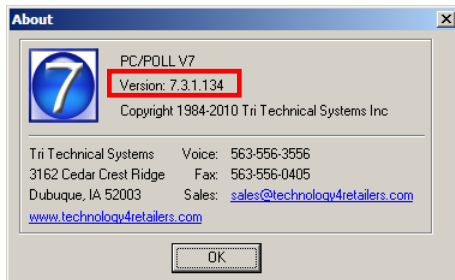
Setup Steps:

The following steps detail how to create one sample report. With the XLS Wizard, users can create many different types of reports. Please use this example as a starting point for your creation process.
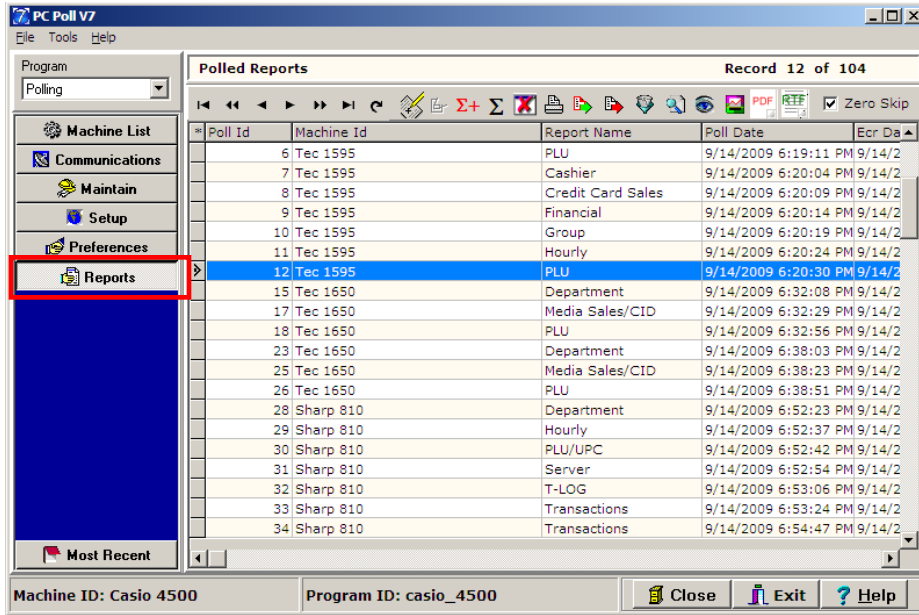

1. Open up V7 Polling from the drop down Program menu near the top of the screen.

2. Scroll down to **About** from the **Help** menu at the top of the screen.

3. Make sure you are running build 7.3.1.134 or a higher version.

4. Go into the Reports area by clicking the **Reports** button on the menu on the left side of the screen. Find a report from one of your previously created machines. Make sure you have a PLU report. Other reports can be used but for this example, we will use a PLU Report. Write down the date of the polls. This one was created on 9/14/2009.
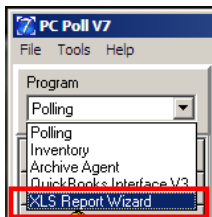
5. Open **XLS Report Wizard**, in the red box above, from the drop down Program menu.
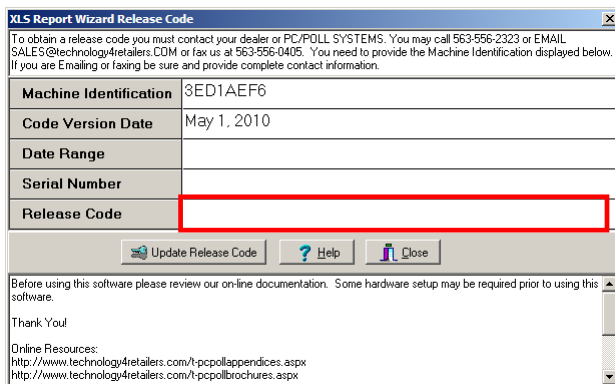
6. A XLS Report Wizard Release Code screen will open requesting a Release Code.

7. In order to activate the software a **Release Code** must be entered in the red box in Step 5. To obtain a Release Code, contact Tri-Technical Systems Sales by phone at 563-556-3556, via email at sales@technology4retailers.com , or via fax at 563-556-0405. Enter the Release Code given by sales in the Release Code entry box and click the **Update Release Code** button.


8. Select the **Template Creator** button.
9. Select the **PLU** button just below the **Template Creator** button. As the cursor is passed over the menu buttons, the color will change. (Any report type will work, but use PLU for this example).
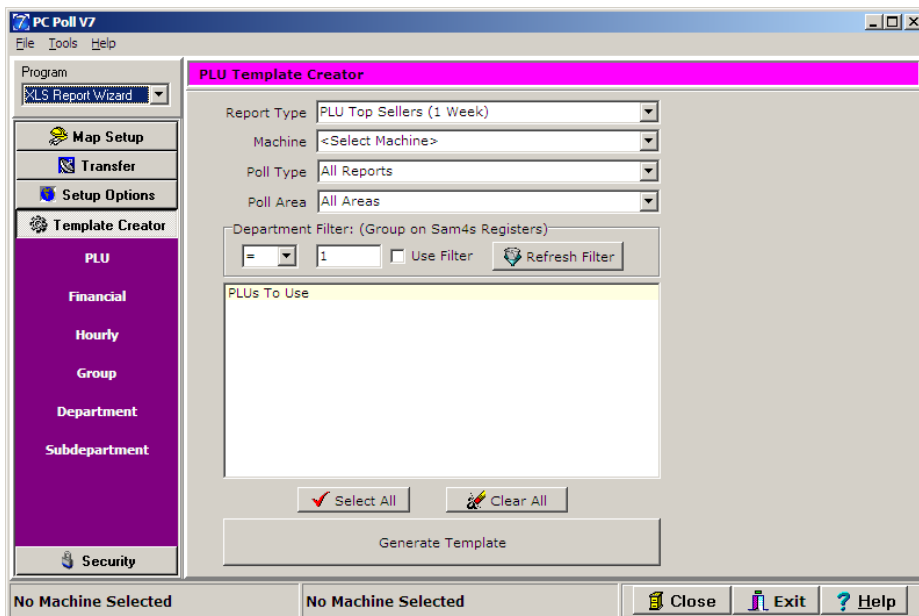
10. Create a template for the machine that corresponds to the report data you have.
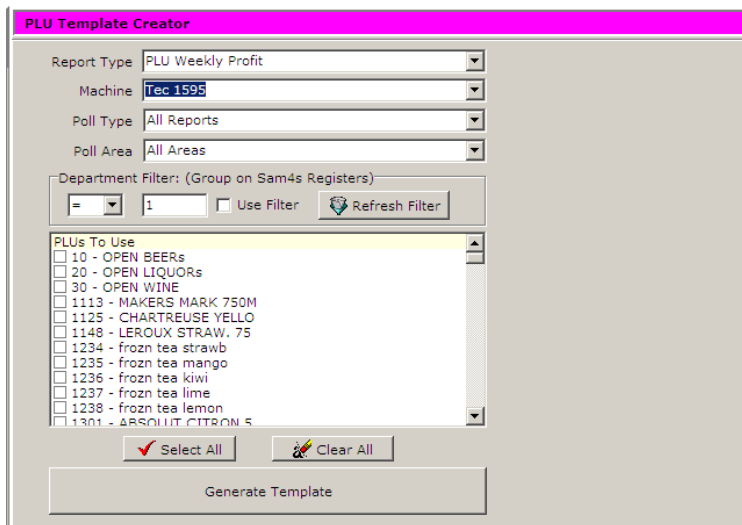
A. For a PLU Profit template, set the Report Type to PLU Weekly Profit.
B. Set the Machine to your desired machine.
C. Leave the Poll Type and Poll Area as is currently set. (Leave the default for ease of use for this example.)
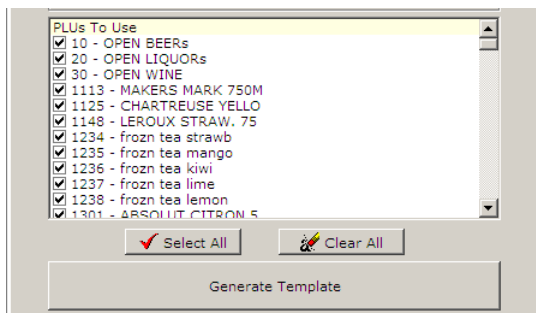
D. Press the **Select All** button to select all PLUs. The entire PLUs list will be checked in the PLUs To Use area of the screen above. The **Clear All** button will clear all selections in the upper portion of the screen.
E. Press the **Generate Template** button to create the Excel® template file. A Save As screen opens.
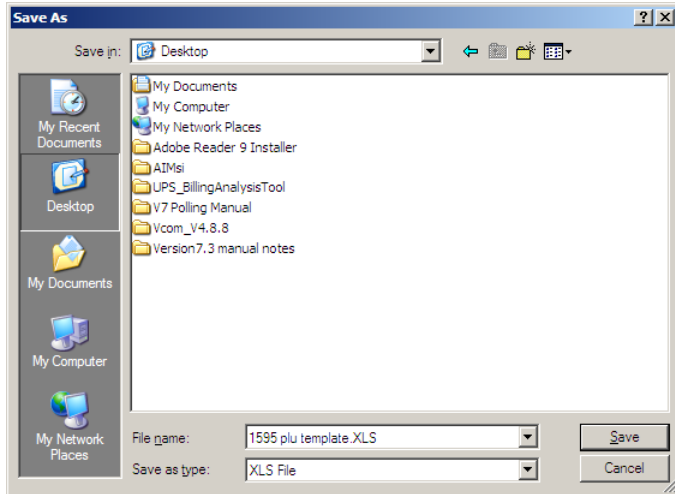
F. Pick a place to save the template to your PC. Click **Save**.
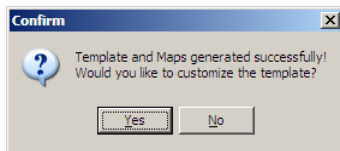
G. Customize if desired, but you can just click the **No** button to that prompt to use the software created defaults.

11. Next, click on the **Transfer** menu button.
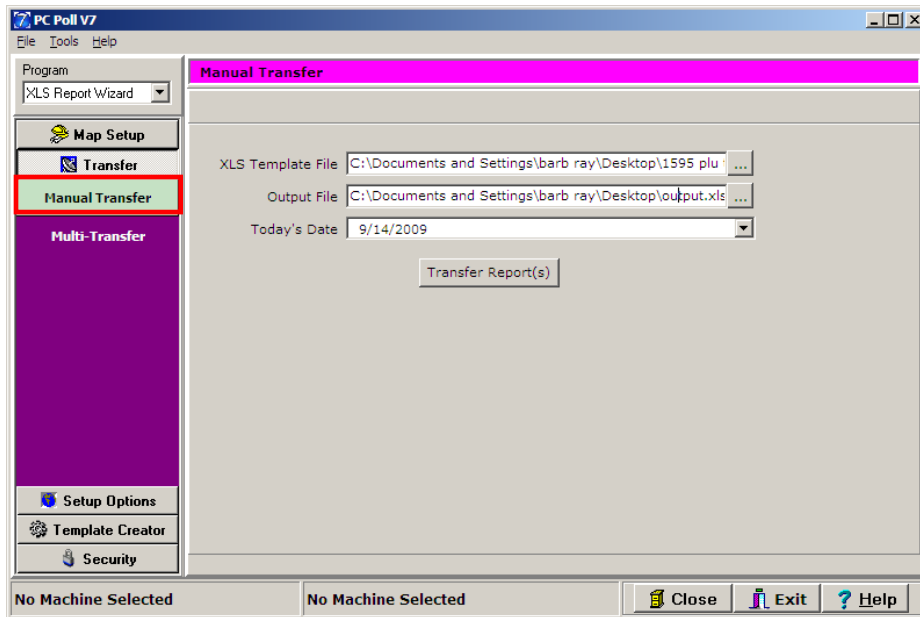
12. Select the **Manual Transfer** button.
13. Find your template file for the XLS Template File line. Point the software to the template you just created.
14. Select a location by using the **Browse** button at the end of the line to browse to the location. Pick a file name for the output file. (A new file anywhere on the PC is acceptable)
15. Change the Today's Date field to match the date of the reports you found in Step 3.
16. Click the **Transfer Reports** button.

Sample Template File

17. The data will transfer and open the new Excel® file.

18. This is the finished report

Other Report Examples

Day of the Month Groups

Day TP Group Breakdown

PLU and Financial

19. For those proficient with Excel®, the report variations are endless.

Map Setup
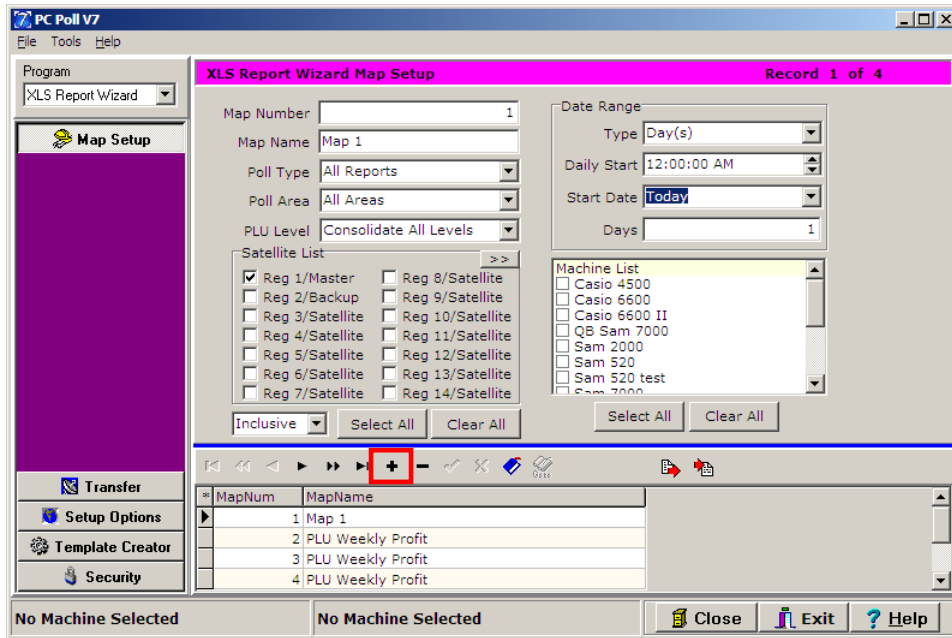
The Map Setup area adds more options to use when adding new maps. When using the template creator, the software will automatically create maps for use.

1. Click on the plus button on the lower tool bar to add a new record.
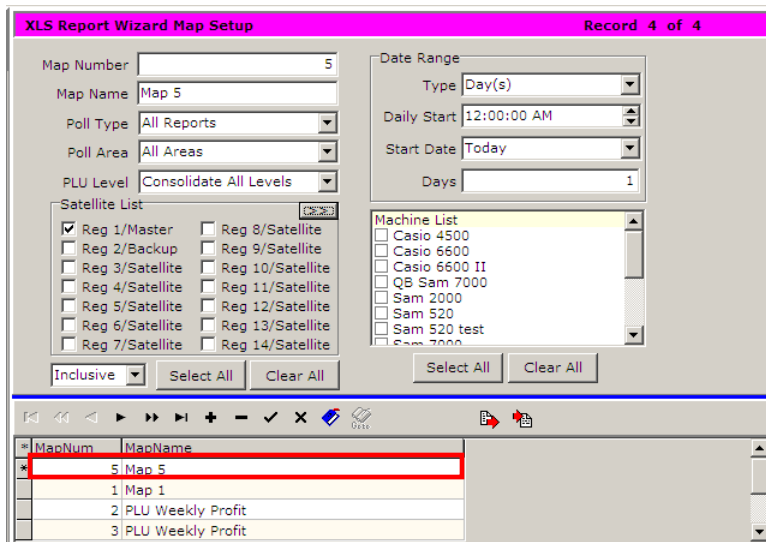
2. A new record is added to the lower grid. After picking the options in the upper part of the screen, click the check mark to post the new record.

Map Number   The Map Number assigned by the software to the new map

Map Name   A descriptive name can be added to the map.
Poll Type   Choose between All Reports, X Reports Only, or Z Reports Only.
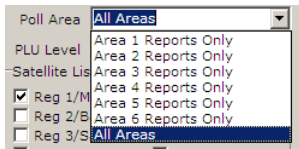
Poll Area   Choose between All Areas or Area 1-6 Only.
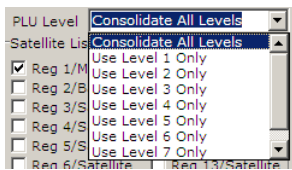
Poll Level   Offers the option to Consolidate All Levels or to Use Level 1-7 Only
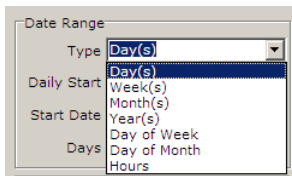
Type   Allows users to choose between Day(s), Week(s), Month(s), Year(s), Day of (the) Week, Day of (the) Month, and Hours so that they can customize the results.

Daily Start   Use to set the time the report will start with.

Start Date   Enter the day to begin the report.

Days   Enter the number of days to include.
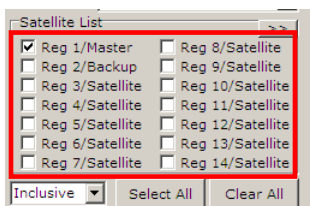
Satellite List   Use to check the appropriate satellite machines.
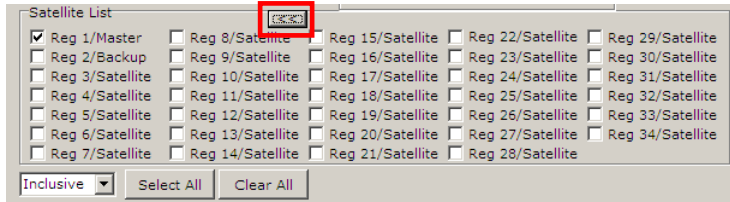
Satellite List chevron button   This button extends the list of available registers.

Inclusive   Picking **Inclusive** includes any combination of the selected registers. For example, if registers 1, 2, & 3 are selected, the **Inclusive** feature includes a report with just register 1 and a report with register 1, 2, 3 to be included in the tabulation.

Exclusive   The Exclusive feature offers an exact match on the selected set of machines. For example, if registers 1, 2, & 3 are selected, only reports with all registers 1, 2, & 3 will be included in the tabulation.

Select All button   Clicking the **Select All** button will check off all satellites in the list.

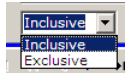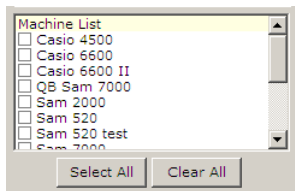**Clear All** button   Clicking the **Clear All** will clear from the Satellite List all checked off satellites.

Machine List   The Machine List allows the user to check off the registers to be included in the new map.

Select All button   Clicking this button will check off all registers in the Machine List to include them in the report.

Clear All button   The Clear All button clears all checked off machines in the Machine List.

You can create templates for various report types. Copy and paste the values from one template into another.

Multi-Transfer Option
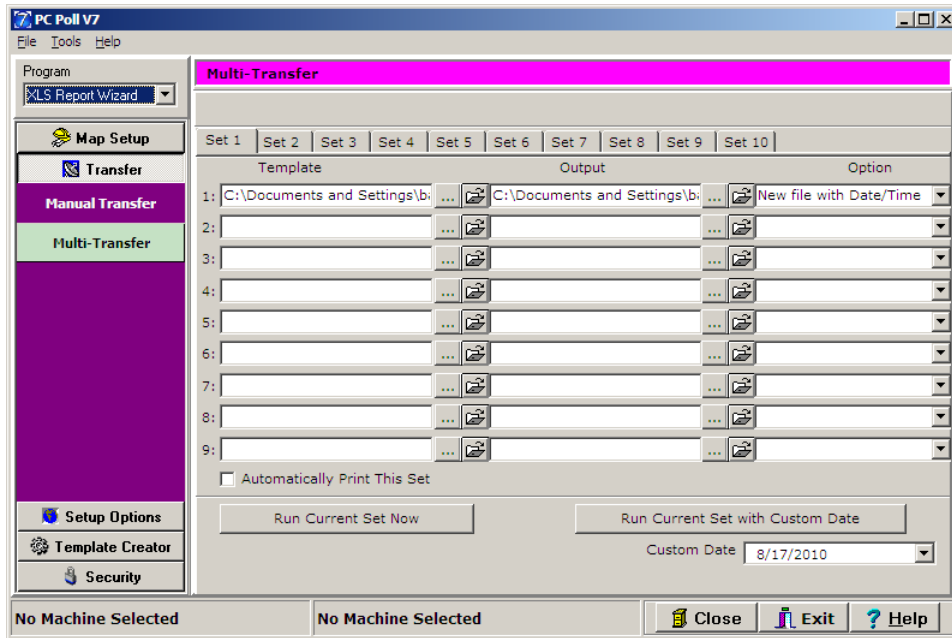
Using the Multi-Transfer option, you can setup paths and then link the multi-transfer to the calendar via the Polling Schedule area. There are 10 Sets available with templates on each set.

1. Search for the template(s) to use for Templates 1-9 on each tab by clicking the **Browse** [...] button or the **Search Folder** [icon] button.
2. Select the folder to save to using either button in step 1.
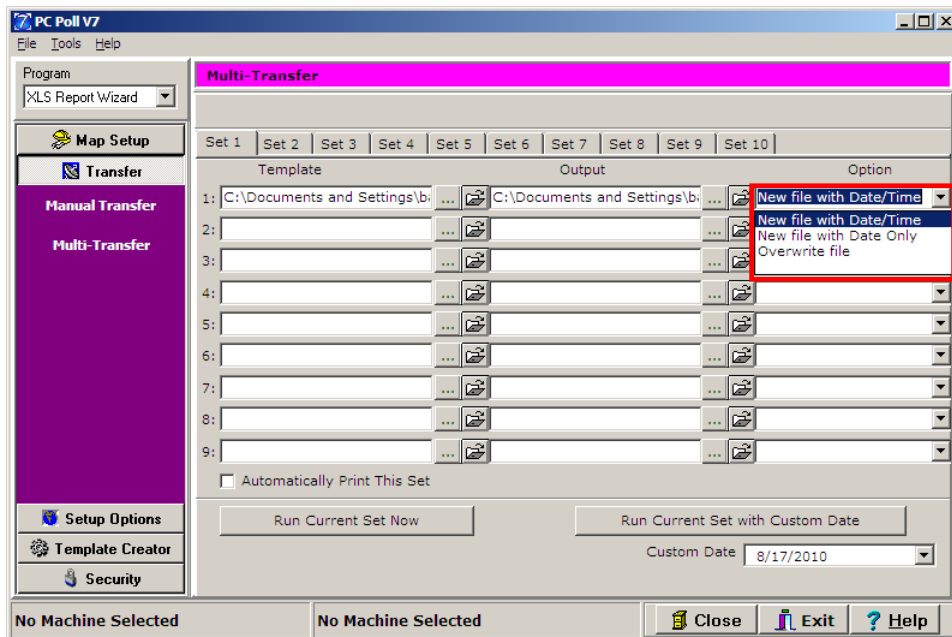
3. Under **Option** column, select one of three options to use for each template: **New file with Date/Time**, **New file with Date Only**, or **Overwrite file**.
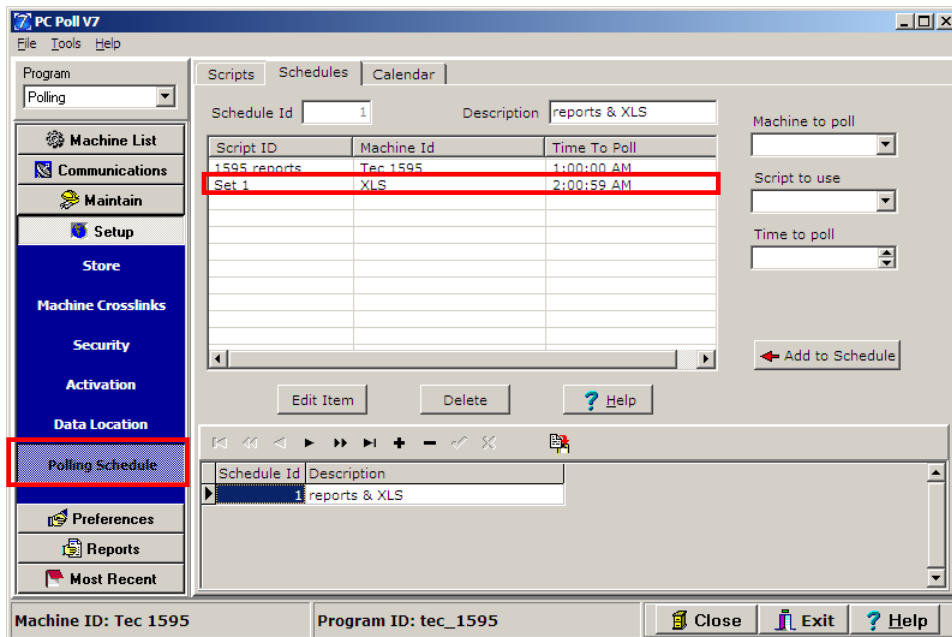4. The **Run Current Set Now** button near the bottom of the screen will start the process immediately.
5. The **Run Current Set with Custom Date** allows the user to pick the date to run the transfer.

6. Go to **Polling** on the Program drop down menu, and click on **Setup**. Then click on **Polling Schedule**.
7. Click on the **Schedule** tab. Set up the transfer by entering a **Description**, **Machine to poll**, **Script to use**, and a **Time to poll**. In the example above, the transfer of Set 1 is ready to go at 2:00:59 AM. Be sure to set the transfer time after the reports are polled (1:00:00 AM).
8. Lastly, activate the calendar to run the events automatically.