

Ad Hoc Reporting Tool



Volume 1

February 2016

		ſ	\sim 1 1
lah	Α	$\cap \uparrow$	Contents
IUD			COnternes

Introduction	3
Accessing the Ad Hoc Reporting Tool	4
Navigating between Ad Hoc Reporting Tool Views	4
Using Different Tabs to Search for Transactions within View Dataflow Navigation	5
Using View Errors Navigation to search for Erred Documents	6
Tips	7

Introduction

This user guide explains what the Ad Hoc Reporting tool is, how to access it, and how to use it.

Overview

The Ad Hoc Reporting tool is a web based application that allows you to view a report of document transactions between your company and your Trading Partners on SPS Commerce's network.

This tool allows you view the raw EDI data if your Trading Partner sends and/ or receives EDI. You can also see the file your company sent or received for a particular transaction, in your data format.

Finally, you will have the ability to see which documents have passed successfully or failed on SPS' network.

Accessing the Ad Hoc Reporting Tool

- 1. Go to spscommerce.net
- 2. Use your login credentials to access the SPS Portal.
- 3. Hover your cursor over Reporting in the top banner.
- 4. Left-click Ad Hoc Reporting.
 - a. A new window will appear in your browser.

NOTE: If you do not see **Ad Hoc Reporting** when hovering your cursor over **Reporting** in the banner, please contact Support or your Implementation Consultant to gain access to the tool.

```
Phone: 888-739-3232
```

E-mail: fiservices@spscommerce.com

SPS COMMERCE	Analytics	WebForms Fulfillment	Reporting	Assortment - Catalog	EDI Testing	Carrier Portal	Retail Universe
Portal		Integrated Fulfil	Iment	Ad Hoc Reporting			
	News Feed			₩.			

Navigating between Ad Hoc Reporting Tool Views

The default view for the Ad Hoc Reporting tool, upon accessing the application, is the **View Dataflow** navigation.

Sidebar:

- View Dataflow Clicking here will allow you to view all dataflow transmitted on SPS' network, with your Trading Partners.
 - a. Business Documents Tab: Allows you to search for data using a variety of fields.
 - b. EDI Documents Tab: Allows you to search for and view raw EDI data.
 - c. File Integration Documents: Allows you to view integrated files sent/received through SPS' network This search option will only work if documents you are searching for are sent/received through an integrated connection.
- View Errors Clicking here will allow you to view only transactions that have failed to fully transmit on SPS' network, between you and your Trading Partner(s).

Navigation	Dataflow								×
View Dataflow	Business Documer	EDI Documents	File Integration Documents						
View Errors	Search								/
	SPS Serial #		-	Overall Status	All Documents	\$			* Required
	Trading Partner			* Start Date					
	Doc Type		\$	* End Date	2/16/2016	20			
	Document Identifier								
									Search Reset
	View - Export	t to Excel							
	SPS Serial #	Sender	Receiver I	Doc Type	Status	Identifier Type	Document Identif	Document Date	/
	No data to display.								

Using Different Tabs to Search for Transactions within View Dataflow Navigation

To use one of the tabs below:

- 1. Left-click **View Dataflow** in the sidebar.
- 2. Left-click the tab you wish to use.

Business Documents Tab

- Enter search criteria in any of the fields to find the document transactions you are looking for.
 NOTE: You can only search for transactions within a 30 day window.
- 2. When you find the document you are looking for you can view more information related to the transaction by clicking one of the following icons.
 - a. Click the **View Business Document** button to open a stylesheet with the data from the document you selected. This stylesheet can also be printed.
 - b. Jump to the **Tips** (page 7) section of this User Guide to learn more about each icon.

Dataflow									~
Business Documents	EDI Documents	File Integration Document	•						
Search									
								* R	lequired
SPS Serial #			Overall Status	In Process	\$				
Trading Partner		Q,	* Start Date	2/1/2016	20				
Doc Type	Invoice	\$	* End Date	2/16/2016	120				
Document Identifier									
								Search	Reset
View - Export to	Excel Detach								
SPS Serial # Se	ender	Receiver	Doc Type	Status	Identifier Type	Document Identif	Document Date		

EDI Documents Tab

Enter search criteria in any of the fields to find the document transactions you are looking for.
 NOTE: You can only search for transactions within a 30 day window.

NOTE: The "EDI Doc Type, ENV CTL #, GRP CTL #, and TRN CTL #" fields refer to information found within the EDI data you are looking for.

- 2. When you find the document you are looking for you can view more information related to the transaction by clicking one of the following icons.
 - a. Click the **View Business Document** button to open stylesheet with the data from the document you selected. This stylesheet can also be printed.
 - b. Jump to the **Tips** (page 7) section of this User Guide to learn more about each icon.
- 3. The **Ack Status** column will display whether a document has been Accepted, Unacknowledged, Rejected, is Invalid, or in Error.
 - a. Click the Binocular icon under the **Ack Status** column to view the raw 997 of a particular transaction.
 - b. Refer to this <u>guide</u> for information on finding 997s within the Ad Hoc Reporting Tool.

Dataflow		×
Business Documents EDI Documents File Integration D	ocuments	
≤ Search		
SPS Serial # GRP CTL #	* Start Date 02/01/2016	* Required
Trading Partner TRN CTL #	* Start Date 02/01/2016 20 * End Date 02/16/2016 20	
EDI Doc Type (C) Ack Status	¢	
ENV CTL # Overall Status	All Documents \$	
		Search Reset
View - Export to Excel		
SPS Seria Sender Receiver	EDI Overall St: ENV CTL # GRP CTI TRN CTL Ack Status Ack Time Created Date	

File Integration Documents Tab

- 1. Enter search criteria in any of the fields to find the document transactions you are looking for. **NOTE:** You can only search for transactions within a 30 day window.
- 2. When you find the document you are looking for you can view more information related to the transaction by clicking one of the following icons.
 - a. Click the **View Business Document** button to open a stylesheet with the data from the document you selected. This stylesheet can also be printed.

NOTE: You will not be able to use this feature if the document was sent/received through WebForms.

b. Jump to the **Tips** (page 7) section of this User Guide to learn more about each icon.

Dataflow					24
Business Docum	nents EDI Documents	File Integration	Documents		
Search					
					* Required
SPS Serial #		Overall Status	All Documents	\$	
Trading Partner		Start Date	02/01/2016	1	
Doc Type	\$	 End Date 	02/16/2016	2	
File Name					
					Search Reset
View - Exp	ort to Excel				
View - Exp	ort to Excel				

Using View Errors Navigation to search for Erred Documents

- Enter search criteria in any of the fields to find the document transactions you are looking for.
 NOTE: You can only search for transactions within a 30 day window.
- 2. Search for specific failed documents by copying the erred Parcel ID you received in an email from SPS and placing it in the **SPS Serial #** search criteria.
 - a. Be sure to set your Start/End Date criteria appropriately.
- 3. Click **View Error** to see the error(s) of the document that failed.
 - a. Make changes as needed so that you can re-transmit any failed documents you sent.

Dataflow	All Errors						_
✓ Search							1 Decesion
TicketUid		De	octype 🔄 💠				* Require
SPS Serial #		v	ersion				
SenderName		🔍 🔹 Star	t Date 01/17/2016		100		
ReceiverName	Orschein Farm	🔍 * End	Date 01/21/2016		20		
							Search Reset
View -	Detach						
TicketUid	SPS Serial #	SenderName	ReceiverName	Doctype	Version	CreatedDate	
	State States of	PHONE MG S.	Opphin Fam.	810	7.0	1/20/2016	View Error
P48124170	2007 00 00	PADIAGING S.	Cristels Fram.	810	7.0	1/18/2016	View Error

Tips



Click the **View Visual Dataflow** button to see the progress of the document through the data center.

- Clicking this button will open a flowchart of the data transmission on SPS' network.
- Here you can see if the document transaction passed or failed, and you can view the document data in each stage of the transaction.

Click the **View Visual Dataflow** button to see documents related to the selected document.



- Clicking this button will open a spreadsheet with all of the documents on SPS' network related to the transaction you selected.
- Using this feature will allow you to easily find Invoices, Ship Notices, and more that are related to a specific Order; or any other document transaction your business trades.

NOTE: You only see related documents for transactions that have gone through SPS' system.

View Error

Click the **View Errors** to view errors associated with the document.

• Clicking this button will open a view contains an email that was sent to your company outlining errors for the failed document.

Export to Excel

Click the **Export to Excel** button to download a spreadsheet of the report generated by your search.



Click the **Close** button in the upper right-hand corner to close any tab or view.