

# Ad Hoc Reporting Tool



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# 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	\$	<ul> <li>End Date</li> </ul>	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.