



MCS Edison – Check It Out: Elevate Your Program Performance with Edison Reporting

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Reports

Report Menu Configurations

- Customizing Stock Reports
 - Set specific criteria
 - Change report title (this does not change the report name within the report itself)
- Add/Delete Report Sections
- Add/Delete Custom Reports
- Suppress Stock Reports
- Report Menu Configurations are assigned to users in Admin & Maintenance – Users

Report Layout Overrides

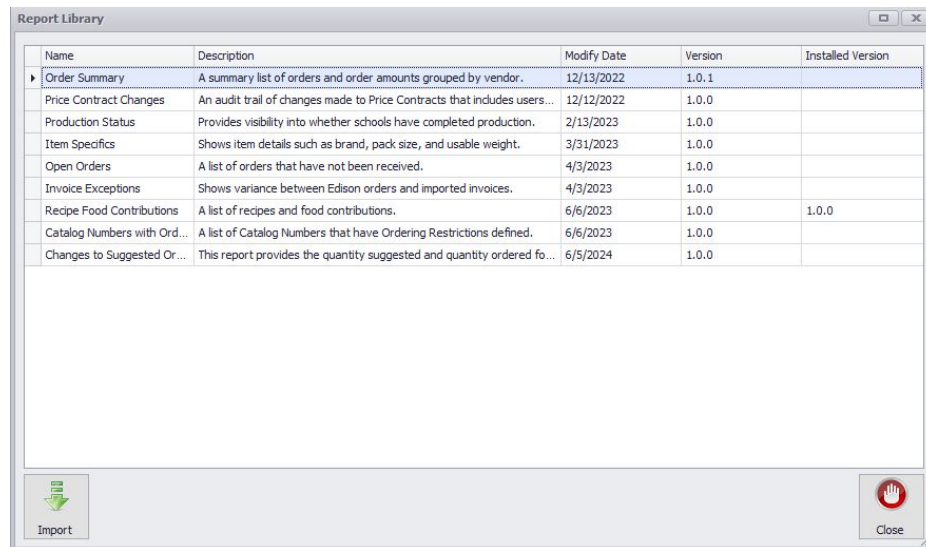
- Create custom versions of stock reports
 - Add, remove and move fields around
 - Save and name the new layout
 - Set new layout as default

The screenshot displays the 'Report Layout Overrides' window. At the top, there is a toolbar with icons for Add, Edit Layout, Rename, Set as Default, Remove, Import, and Export. Below the toolbar, the 'Report Name' is 'Transfer Ticket'. Under the 'Layouts' section, there is a table with two columns: 'Layout Description' and 'Is Default'.

Layout Description	Is Default
Transfer Ticket Signature	<input checked="" type="checkbox"/>
(System-Defined Layout)	<input type="checkbox"/>

User Defined Reports

- Report Library
 - Import reports to your User Defined Reports list
 - Add the reports to your Report Menu Configurations as needed

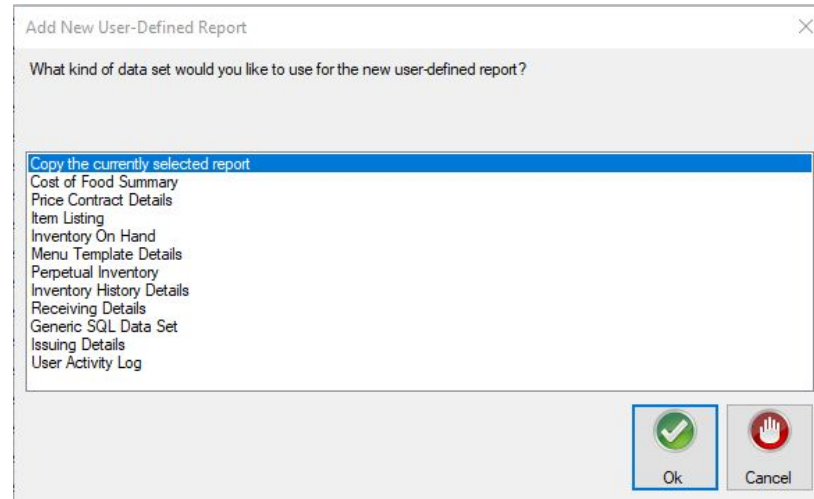


The screenshot shows a window titled "Report Library" with a table of reports. The table has five columns: Name, Description, Modify Date, Version, and Installed Version. The first row is highlighted with a blue arrow icon in the first column. Below the table, there is a large empty space and two buttons at the bottom: "Import" (with a green arrow icon) and "Close" (with a red hand icon).

Name	Description	Modify Date	Version	Installed Version
Order Summary	A summary list of orders and order amounts grouped by vendor.	12/13/2022	1.0.1	
Price Contract Changes	An audit trail of changes made to Price Contracts that includes users...	12/12/2022	1.0.0	
Production Status	Provides visibility into whether schools have completed production.	2/13/2023	1.0.0	
Item Specifics	Shows item details such as brand, pack size, and usable weight.	3/31/2023	1.0.0	
Open Orders	A list of orders that have not been received.	4/3/2023	1.0.0	
Invoice Exceptions	Shows variance between Edison orders and imported invoices.	4/3/2023	1.0.0	
Recipe Food Contributions	A list of recipes and food contributions.	6/6/2023	1.0.0	1.0.0
Catalog Numbers with Ord...	A list of Catalog Numbers that have Ordering Restrictions defined.	6/6/2023	1.0.0	
Changes to Suggested Or...	This report provides the quantity suggested and quantity ordered fo...	6/5/2024	1.0.0	

User Defined Reports

- Creating a new User Defined report
 - Use a predefined data set
 - Use a Generic SQL Data Set (SQL query)



User Defined Reports

- Setup Data Set – set report criteria

The image shows two overlapping dialog boxes from a software application. The background dialog is titled 'Edit User-Defined Report' and contains a 'Description' field with the text 'New Item Listing Report', a 'Data Set' dropdown menu showing 'Item Listing', and an 'Inactive' checkbox. Below these are three buttons: 'Setup Data Set' (highlighted with a blue border), 'Edit Layout', and 'Test'. The foreground dialog is titled 'Configure Dataset' and contains a 'Filter by Item' section with radio buttons for 'Specific Item', 'Specific Catalog Number', 'Item Storage Category', 'Item Usage Type', 'Ordering Category', 'Brand', and 'By Other Category'. Each of these has a corresponding dropdown menu. The 'All Items' radio button is selected. Below this are checkboxes for 'Include Inactive Items' and 'Include Active Items'. At the bottom are 'Options' with checkboxes for 'Include Inactive' and 'Include Leftover Recipes'. Both dialog boxes have 'Ok' and 'Cancel' buttons at the bottom right.

Edit User-Defined Report

Description: New Item Listing Report

Data Set: Item Listing ☐ Inactive

Setup Data Set **Edit Layout** **Test**

Configure Dataset

Filter by Item

- ☐ Specific Item
- ☐ Specific Catalog Number
- ☐ Item Storage Category: Chemicals
- ☐ Item Usage Type: Baked Goods
- ☐ Ordering Category: Bread
- ☐ Brand: Advanced Pierre
- ☐ By Other Category: (n/a)

☒ All Items

☒ Include Inactive Items ☒ Include Active Items

Options

- ☐ Include Inactive
- ☐ Include Leftover Recipes

Ok **Cancel**

User Defined Reports

- Edit Layout – add fields, groups, sorting

