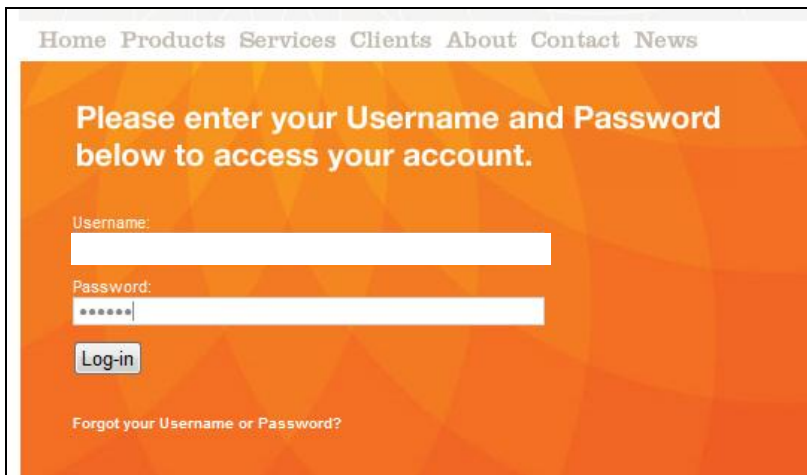
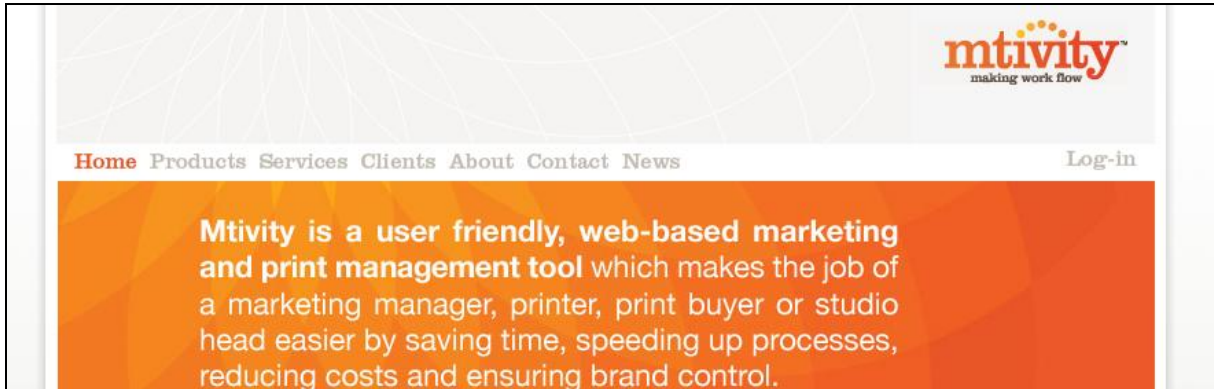


Reporting Guide

Mativity Inc.

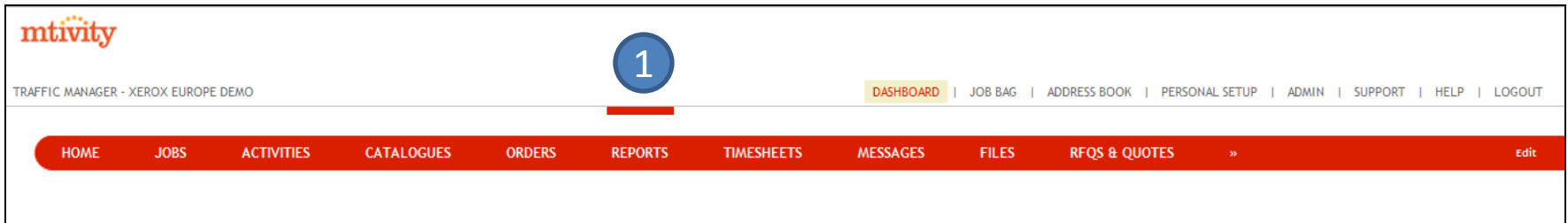
Log In to Mtivity



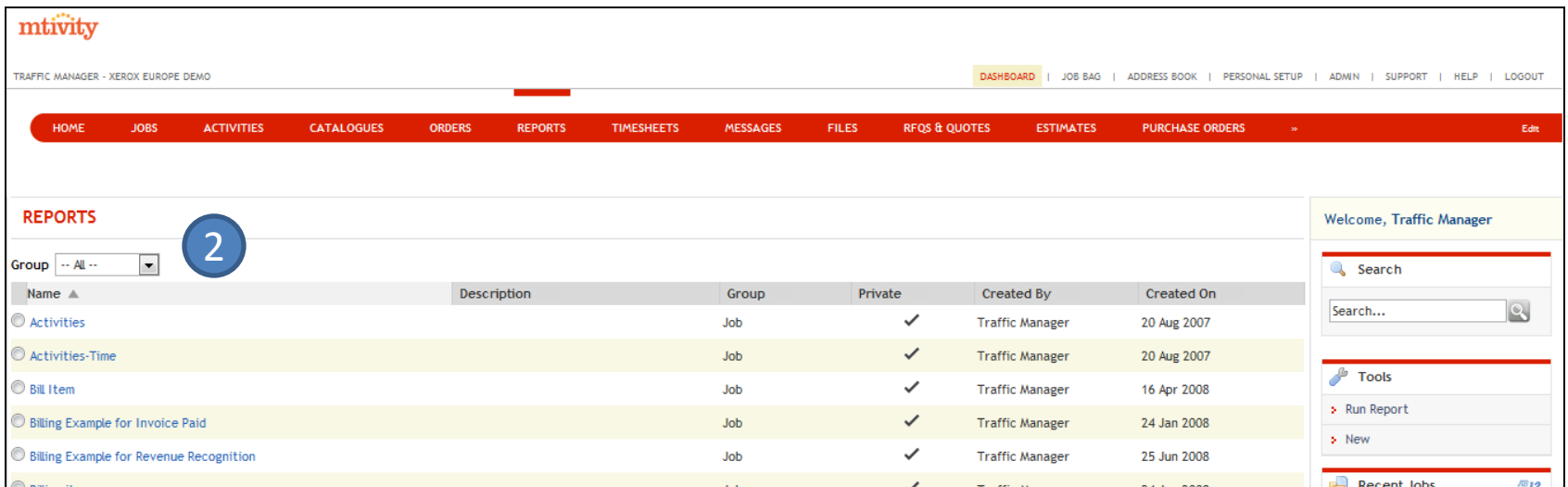
To access reports, **Log In** to Mtivity

Running a report

1) From your home page, select **Reports** on the top Navigation bar.

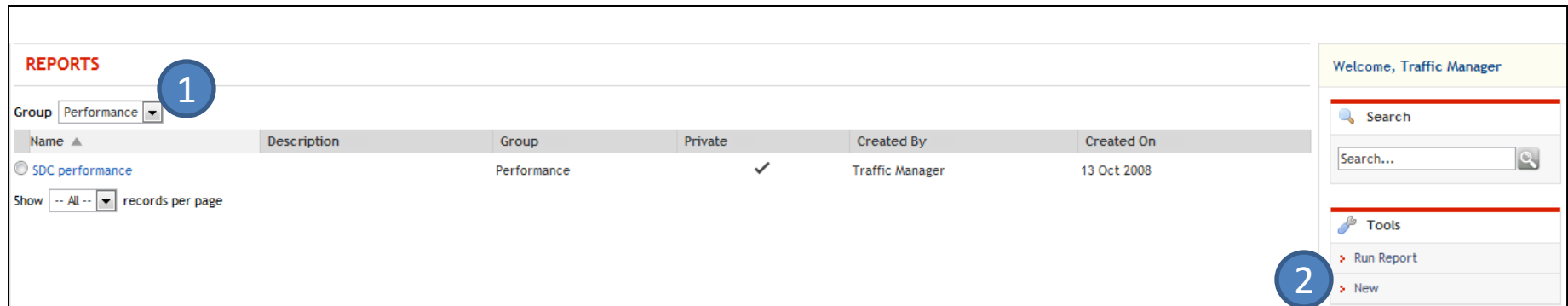


2) You will need to then change the **Group**, to **Performance**. This will appear in the drop down menu here.



Running a report

1) After selecting **Performance** from the Group drop down menu, your screen will change to the below.



The screenshot displays the 'REPORTS' section of the mtivity interface. A blue circle with the number '1' highlights the 'Performance' dropdown menu in the 'Group' field. Below this is a table with the following data:

Name ▲	Description	Group	Private	Created By	Created On
SDC performance		Performance	✓	Traffic Manager	13 Oct 2008

Below the table, there is a 'Show' dropdown menu set to 'ALL' and the text 'records per page'. On the right side, a sidebar contains a 'Welcome, Traffic Manager' message, a 'Search' field, and a 'Tools' menu with options for 'Run Report' and 'New'. A blue circle with the number '2' highlights the 'New' option in the 'Tools' menu.

2) To generate your new report, click **New** here, under the Tools Menu.

RUNNING A REPORT: SUMMARIZED SUPPLIER REPORT

Running a report

You will be presented with this screen, Step 1 of 4.

TRAFFIC MANAGER - XEROX EUROPE DEMO

DASHBOARD | JOB BAG | ADDRESS BOOK | PERSONAL SETUP | ADMIN | SUPPORT | HELP | LOGOUT

HOME | JOBS | ACTIVITIES | CATALOGUES | ORDERS | REPORTS | TIMESHEETS | MESSAGES | FILES | RFQS & QUOTES | ESTIMATES | PURCHASE ORDERS

NEW REPORT - STEP 1 OF 4

Welcome, Traffic Manager

Recent Jobs 12

- Campaign-Nokia 97
- AF April
- Andrew Agency test
- Agency Test
- Andrew-Myra
- Agency
- Andrew
- Boston Print Buyers
- 0000002-Andrew Billing Examp...
- 0000012-Andrew Billing Examp...

LIVE SUPPORT OFFLINE
CLICK HERE TO LEAVE A MESSAGE

1 * Name

2 Description

Private

Report Style Tabular Summary

3 * Report Group -- Choose One --

4 * Report -- Choose One --

5 Next Save Cancel

- 1) You must enter a **Name** for the report
- 2) **Description** is optional, but can be helpful
- 3) Select your **Report Group** – please select Performance here.
- 4) Select the **Report** you would like. For this section of the guide we choose Summarized Supplier Report.
- 5) Click **Next** to continue to Step 2.

* Report Group Performance

* Report Summarised Supplier Report

At any point you can click **Save** instead of Next to save your report template for completion at a later date.

Running a report

NEW REPORT - STEP 2 OF 4

View -- All -- ▾

Available Columns		Selected Columns					
Name	Category	Name	Category	Total	Avg	Max	Min
		Work Type	Default				
		RFQs Sent	Default				
		Supplier Name	Default				
		RFQs Sent To Supplie	Default				
		Quotes Submitted B	Default				
		Purchase Orders Se	Default				
		RFQs Sent To Supplie	Default				
		Quote Submitted/E	Default				
		<input type="checkbox"/> Display Total Number of Results					

2

1

3

4

Move Up

Move Down

Previous Next Save Cancel

Step 2 is where you select your **columns** for your report.

- 1) As default, all available columns appear in the **Selected Columns** box, if you proceed as default, your report will report on all these columns.
- 2) To **customize** your report, use these controls (arrows). You can remove any column by selecting the column header and then the left facing arrow (2nd down), to move that column header to the 'Available Columns' box. To move any columns back, use the right facing arrow .
- 3) You can choose to move column headers up or down to change the order with these buttons.
- 4) When you are happy with the columns that will appear on your report, click **Next**.

Running a report

Explanations of column headers for reporting.

Work Type	The work type classification that was listed against the RFQ
Supplier Name	Name of the supplier.
RFQs Sent	Total number of RFQs sent
RFQs Sent To Supplier	Total number of RFQs sent to that supplier
Quotes Submitted By Supplier	Total number of quotes submitted by that supplier
Purchase Orders Sent To Supplier	Total number of POs sent to that supplier
RFQs Sent To Supplier/RFQs Sent (%):	Percentage of RFQs that were sent to that specific supplier versus all RFQs sent.
Quotes Submitted/RFQs Sent (% for Supplier)	Percentage of RFQs that were responded to by the supplier with a quote.
Purchase Orders Sent/RFQs Sent (% for Supplier)	The percentage that supplier won the Job, the percentage of times they were sent POs verses RFQs sent to them.
Purchase Orders Sent/Quotes Submitted (% for Supplier)	The percentage of POs awarded versus the number of quotes the supplier submitted.
Total Value	Total Value of the awarded Jobs

Running a report

NEW REPORT -STEP 3 OF 4

Calculated Fields

Note: Calculated Fields display dynamically generated calculations based on the results of your report. You must give your calculation a name which will be displayed along with the result in your generated report. If the Field 1 selection is Number you must enter a number, otherwise, if Count is selected use the drop down menu to select a grouping (the number of results returned for that grouping will be used). You should then select an Operator which will be used as the basis of your calculation and again, either enter a positive number or select a grouping for Field 2. If a Name is entered the Operator, Field 1, and Field 2 will be treated as mandatory. If more than one row is used, all Fields in the subsequent rows will become mandatory. You may enter up to 6 calculation Rows. If you do not want to create a Calculated Field simply click Next

Name	<input type="text"/>	Operator	Plus <input type="text"/>
Field 1	Number <input type="text"/>	Field 2	Number <input type="text"/>

1

Previous Next Save Cancel

1) Step 3 – please go straight to Step 4, by clicking **Next**.

Running a report

NEW REPORT - STEP 4 OF 4

User Filtering 1 Allow Re-Filtering (User may re-filter results)
 Static (User may not re-filter results)

Standard Filters

Standard Filters -- Choose One --

Advanced Filters

Show results where 5 -- Choose One -- -- Choose One --
And -- Choose One -- -- Choose One --
And -- Choose One -- -- Choose One --
And -- Choose One -- -- Choose One --

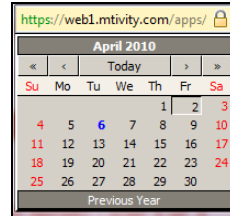
6 Previous Next Save Cancel

Step 4 is where you will set your **Parameters** for your Report.

- 1) Select here if you would like the user to be able to further filter the report or not.

Advanced Filters 2 3 4

Show results where Job Start Date Is Between 29 Mar 2010 2 Apr 2010



- 2) The first drop down menu, **Show Results Where**, is your primary parameter selector. Choose from the drop down menu. Here we choose Job Start Date. This will generate a report of jobs that have been created in the past month for example.
- 3) Your next drop down menu will show **options**, eg. *Is after today, Is before today, Is between, Is before, On or after*. We will select *Is between* to give us a time period the report will be ran for.
- 4) To **Select your dates**, use this icon to launch a pop up calendar, you can then click the appropriate date. Close the calendar and click on the next icon to select the 'closing' date.
- 5) You may select **further parameters**, with the additional drop down menus.
- 6) When you have completed your selection, click **Next**.

Running a report

Your report will then be generated and shown, as example below.

ACM TEST REPORT

Note: Standard Filters search within returned results only. Changes made to Filters after running the report are not saved.

View **1** -- Choose One -- where the -- Choose One -- -- Choose One --

Group By -- Choose One -- -- Choose One --

2 **3**

Previous Run Report Save Export To CSV Cancel

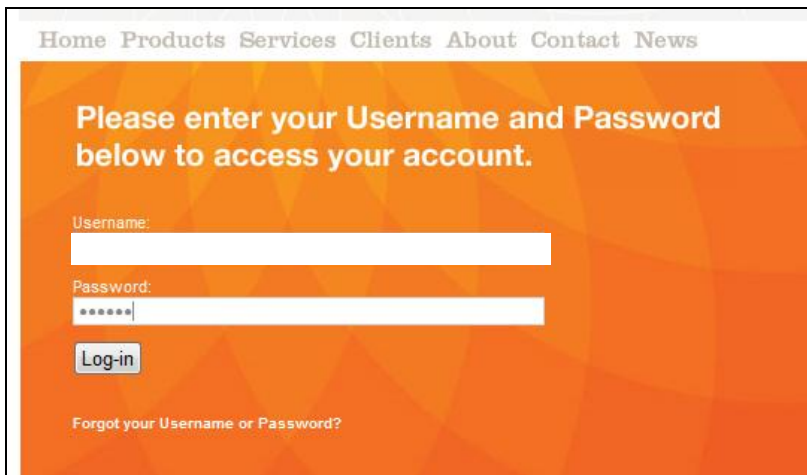
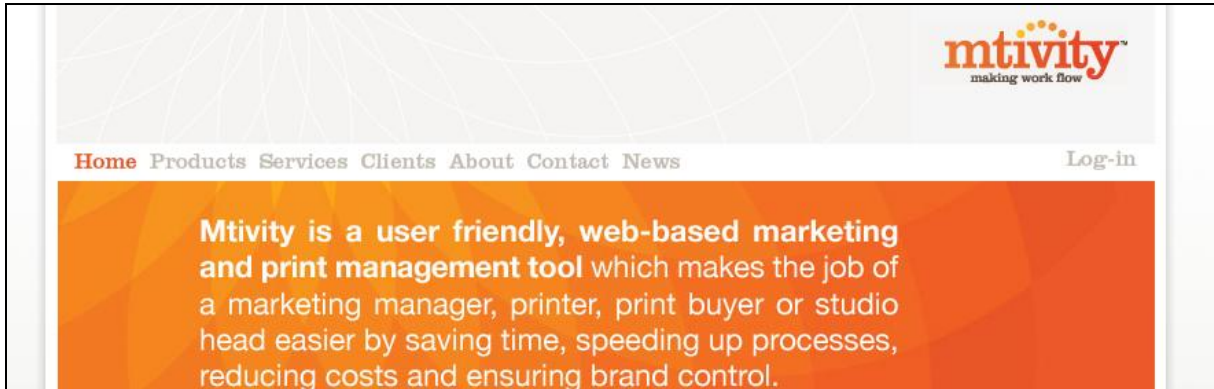
Work Type	Supplier Name	Quotes Submitted By Supplier	Purchase Orders Sent To Supplier	RFQs Sent To Supplier/RFQs Sent (%)	Quotes Submitted/RFQs Sent (% for Supplier)	Purchase Orders Sent/RFQs Sent (% for Supplier)	Purchase Orders Sent/Quotes Submitted (% for Supplier)	Total Value	RFQs Sent	RFQs Sent To Supplier
Absent	AL-Demo	0	0	0.00	0.00	0.00	0.00	\$0.00	0	0
Absent	Craigdon	0	0	0.00	0.00	0.00	0.00	\$0.00	0	0
Absent	drukdoenerij1	0	0	0.00	0.00	0.00	0.00	\$0.00	0	0
Absent	drukdoenerij2	0	0	0.00	0.00	0.00	0.00	\$0.00	0	0

You have options here for how to use this report.

- 1) These menus will be accessible, if applicable to your report. If using, select Run Report to re-run your report with your updated filters.
- 2) **Save** will save your report in Mtivity.
- 3) **Export to CSV** will download this report for local or offline use in an excel format.

Running a report: Individual Supplier Reports

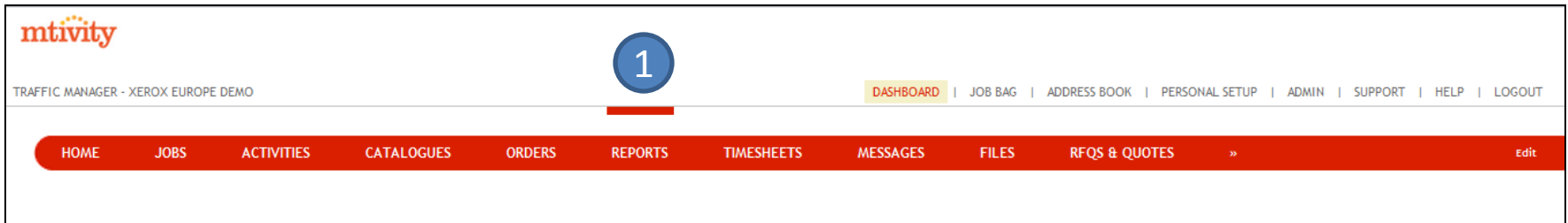
Log In to Mtivity



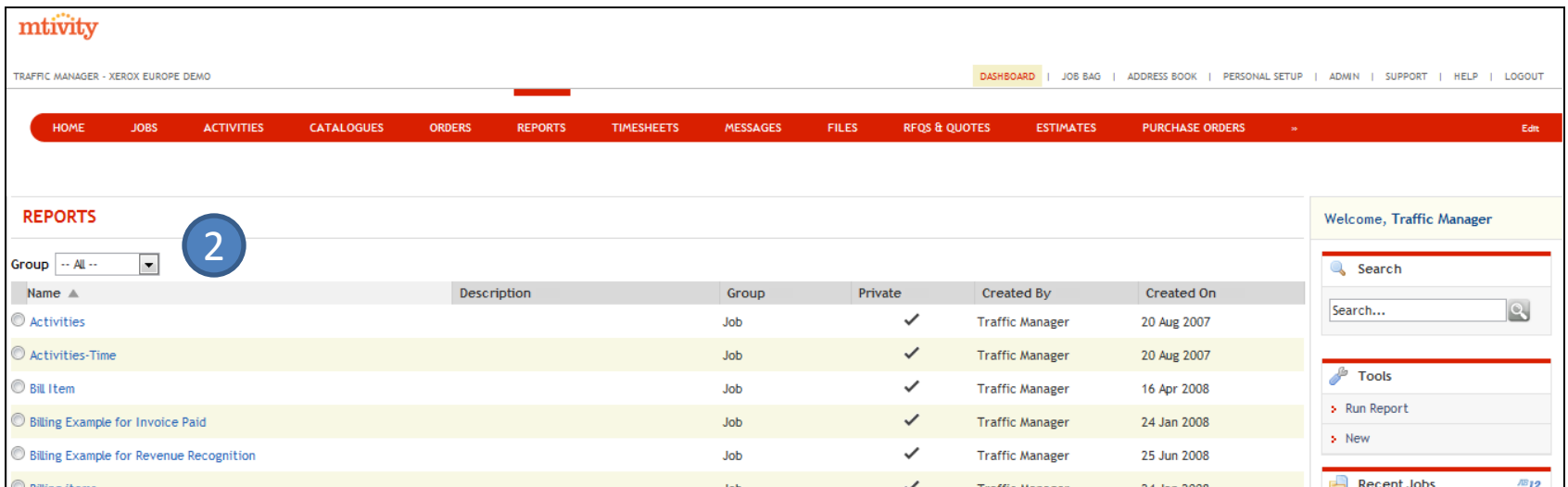
To access reports, **Log In** to Mtivity

Running a report

1) From your home page, select **Reports** on the top Navigation bar.

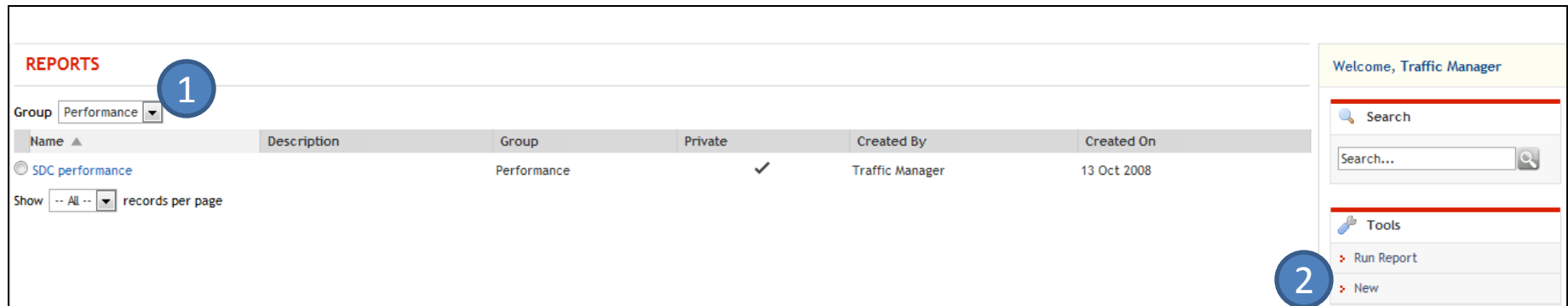


2) You will need to then change the **Group**, to **Performance**. This will appear in the drop down menu here.



Running a report

1) After selecting **Performance** from the Group drop down menu, your screen will change to the below.



The screenshot displays the 'REPORTS' section of the mtivity interface. A blue circle with the number '1' highlights the 'Performance' option in the 'Group' dropdown menu. Below the menu is a table with the following data:

Name ▲	Description	Group	Private	Created By	Created On
SDC performance		Performance	✓	Traffic Manager	13 Oct 2008

Below the table, there is a 'Show' dropdown menu set to 'ALL' and the text 'records per page'. On the right side, a sidebar contains a 'Welcome, Traffic Manager' message, a 'Search' box, and a 'Tools' menu. A blue circle with the number '2' highlights the 'New' option in the 'Tools' menu.

2) To generate your new report, click **New** here, under the Tools Menu.

Running a report

You will be presented with this screen, Step 1 of 4.

TRAFFIC MANAGER - XEROX EUROPE DEMO

DASHBOARD | JOB BAG | ADDRESS BOOK | PERSONAL SETUP | ADMIN | SUPPORT | HELP | LOGOUT

HOME | JOBS | ACTIVITIES | CATALOGUES | ORDERS | REPORTS | TIMESHEETS | MESSAGES | FILES | RFQS & QUOTES | ESTIMATES | PURCHASE ORDERS | Edit

NEW REPORT - STEP 1 OF 4

*** Name**

Description

Private

Report Style Tabular Summary

*** Report Group**

*** Report**

Next Save Cancel

Welcome, Traffic Manager

Recent Jobs 12

- Campaign-Nokia 97
- AF April
- Andrew Agency test
- Agency Test
- Andrew-Myra
- Agency
- Andrew
- Boston Print Buyers
- 0000002-Andrew Billing Examp...
- 0000012-Andrew Billing Examp...

LIVE SUPPORT OFFLINE
CLICK HERE TO LEAVE A MESSAGE

- 1) You must enter a **Name** for the report
- 2) **Description** is options, but can be helpful
- 3) Select your **Report Group** – please select Performance here.
- 4) Select the **Report** you would like. For the purpose of this guide, we choose **Individual Supplier Report**.
- 5) Click **Next** to continue to Step 2.

*** Report Group** Performance

*** Report** Individual Supplier Report

At any point you can click **Save** instead of Next to save your report template for completion at a later date.

Running a report

NEW REPORT - STEP 2 OF 4

View -- ALL -- ▾

Available Columns		Selected Columns					
Name	Category	Name	Category	Total	Avg	Max	Min
RFQ Number	Default	Supplier Name	Default				
RFQ Name	Default	Job Number	Default				
Job Type	Default	Job Name	Default				
Work Type	Default	RFQ Description	Default				
Client Company	Default	Quote Value	Default				
Client Contact	Default	PO Value	Default				
Client Reference	Default	RFQ Won By	Default				
Client Department	Default	Difference to Winni	Default				
		<input type="checkbox"/> Display Total Number of Results					

1

2

3

Move Up

Move Down

Previous Next Save Cancel

Step 2 is where you select your **columns** for your report. There are more columns to choose from than available for a Summarized Supplier Report.

- 1) To **customize** your report, use these controls (arrows), you can remove any column by selecting the column header and then the left facing arrow (2nd down), to move that column header to the Available Columns box. To move any columns to Selected Columns box, use the right facing arrow (1st).
- 2) You can choose to move column headers up or down to change the order with these buttons.
- 3) When you are happy with the columns that will appear on your report, click **Next**.

Suggested Minimum Column Headers

Job Number
Job Type
Supplier Name
Work Type
Quote Value
PO Value
Difference to winning bid.

Running a report

NEW REPORT -STEP 3 OF 4

Calculated Fields

Note: Calculated Fields display dynamically generated calculations based on the results of your report. You must give your calculation a name which will be displayed along with the result in your generated report. If the Field 1 selection is Number you must enter a number, otherwise, if Count is selected use the drop down menu to select a grouping (the number of results returned for that grouping will be used). You should then select an Operator which will be used as the basis of your calculation and again, either enter a positive number or select a grouping for Field 2. If a Name is entered the Operator, Field 1, and Field 2 will be treated as mandatory. If more than one row is used, all Fields in the subsequent rows will become mandatory. You may enter up to 6 calculation Rows. If you do not want to create a Calculated Field simply click Next

Name	<input type="text"/>	Operator	Plus <input type="text"/>
Field 1	Number <input type="text"/>	Field 2	Number <input type="text"/>

1

Previous Next Save Cancel

1) Step 3 – please go straight to Step 4, by clicking **Next**.

Running a report

NEW REPORT - STEP 4 OF 4

User Filtering Allow Re-Filtering (User may re-filter results) Static (User may not re-filter results)

Standard Filters

Standard Filters -- Choose One --

Advanced Filters

Show results where

1 Job Start Date Is Between 29 Mar 2010 2 3 2 Apr 2010

4 And -- Choose One -- -- Choose One --

And -- Choose One -- -- Choose One --

And -- Choose One -- -- Choose One --

5 Previous Next Save Cancel

Step 4 is where you will set your **Parameters** for your Report.

- 1) The first drop down menu, under **Show Results Where** is your primary parameter selector. Choose from the drop down menu. Here we choose Job Start Date. This will generate a report of jobs that have been created in the past month for example.
- 2) Your next drop down menu will show **options**, eg. *Is after today, Is before today, Is between, Is before, On or after*. We will select *Is between* to give us a time period the report will be ran for.
- 3) To **Select your dates**, use this icon to launch a pop up calendar, you can then click the appropriate date. Close the calendar and click on the next icon to select the 'closing' date.
- 4) For the **Individual Report** we recommend also selecting a parameter of Supplier Name. You can then select your options and type the relevant information in the text box. E.g. if you select Equals To, you will need to enter the full supplier name. For Contains, you can enter a partial name.
- 5) Select **Next** to generate your report.

4 Job Start Date Is Between 29 Mar 2010 2 A

And Supplier Name Contains

And -- Choose One -- -- Choose One --

Running a report

ACM TEST 2 REPORT

Note: Standard Filters search within returned results only. Changes made to Filters after running the report are not saved.

View **1** -- Choose One -- where the -- Choose One -- -- Choose One --
 Group By -- Choose One -- -- Choose One --

2 **3**
 Previous Run Report Save Export To CSV Cancel

Supplier Name	Job Number	Job Name	RFQ Description	Quote Value	PO Value	RFQ Won By	Difference to Winning Quote (%)
Xerox Supplier2 Company	--000856	Agency Test		\$100.00	\$100.00	Xerox Supplier2 Company	0.00
Xerox Supplier2 Company	--000857	Andrew-Myra					
Xerox Supplier3	--000856	Agency Test		\$150.00	\$100.00	Xerox Supplier2 Company	50.00
Xerox Supplier3	--000857	Andrew-Myra					
Xerox Supplier4	--000856	Agency Test		\$300.00	\$100.00	Xerox Supplier2 Company	200.00
Xerox Supplier4	--000857	Andrew-Myra					

Previous Run Report Save Export To CSV Cancel

You have options here for how to use this report.

- 1) These menus will be accessible, if applicable to your report. If using, select Run Report to re-run your report with your updated filters.
- 2) **Save** will save your report in Mitivity.
- 3) **Export to CSV** will download this report for local or offline use in an excel format.