



Despatch Manager Online

Reporting Guide

February 2015

Version 2.0

Contents

- Introducing DMO Shipping System Reporting.....3
- Standard Reporting.....3
- Schedule/ Run/Delete/Modify Reports5
 - Scheduling a Report..... 5
 - Running Reports..... 7
 - Deleting a Scheduled Report..... 9
 - Modifying Standard Reports..... 10
- Creating a Custom Report 14

Introducing DMO Shipping System Reporting

This document will give you a quick start guide for running standard reports and also for creating and running your own reports..

For the general DMO user guide please email the RMDMO Helpdesk on rmdo@royalmail.com for a copy of the DMO Shipper User guide.

Standard Reporting

There are five standard report templates provided with DMO:

Standard Report Template	Description
Statistic Report by Number since opened	This report produces a PDF document presenting the total number of shipments by recipient town.
Posting Report by Destination Country & Location	This report produces a PDF document presenting the total number of shipments by destination country and location
Statistic Report by Shipper Activity	This report produces a PDF document presenting the total number of shipments by shipper and service reference
Detailed Report by Shipper Date	This report produces a CSV file presenting all shipment fields sorted by shipping date
Volume Report by Shipping Date	This report produces a PDF document presenting the total number of shipments by shipping date

These reports can be run as is, or modified to create your own reports

From the Archive main menu option, highlight and click on Reporting. The user has two options: Create Report or View Report. Click on Create Reports.

After clicking on Create Report the default screen below shows the standard template reports available.

Shipping Services		Shipments	End of Day	Archive	Addresses	Admin	Help	Log Off
-------------------	--	-----------	------------	---------	-----------	-------	------	---------

Archived Shipments	
Reporting	
Create Report	13/Mar/2014
View Report	
Audit Reporting	
Create Audit Report	
View Audit Report	

Create Reports

Select a Report template in the list below and click on Run or Schedule to launch it. If you want to create your own template, you can either click on New or select an existing report. To view an existing or scheduled report result, go to the [View Report](#) page.

Standard Reports
 My Reports

Template:

- Volume Report by Recipient
- Posting report by Destination Country & Location
- Shipper Activity Report
- Detailed report by Shipping Date
- Volume report by Shipping Date

Description:

New ↘
Modify ↘
Delete ↘

Schedule ↗
Run ↗

There are five standard report templates available on the left hand side of the screen above. Click on a specific template to see the detailed description in the Description box above.

Standard report templates can be modified and then scheduled for a particular date(s), or run now, to meet your requirements. See next section for more details. Where a report template has been modified there is an opportunity to give the modified report template a new report name.

Checking My Reports field in the screen above will list those reports that have been created by you completely, or as a modification of a standard report. These reports can also be modified and then scheduled for a particular date(s), or run now, to meet your requirements.

Schedule/ Run/Delete/Modify Reports



All reports can be Scheduled, Run and Modified as required.

Scheduling a Report

To Schedule a Report - Highlight the report to be scheduled in the 'Available Reports' and click on the  button on the screen on the previous page:

This action triggers the appearance of the pop-up window below:

Schedule a Report

Report: Volume Report by Recipient

Period of Selection: Last 1 Calendar Month

Scheduled: Run on

Here is a list of the next five reports that will be run based on your scheduling selection:

Report Available On:	From:	To:
17/03/2014	01/03/2014	16/03/2014
24/03/2014	01/03/2014	23/03/2014
31/03/2014	01/03/2014	30/03/2014
07/04/2014	01/04/2014	06/04/2014
14/04/2014	01/04/2014	13/04/2014

Note: As the report process is launched early in the morning, the last shipments available for reporting will be those manifested on the day before the report is generated.

Send the report by email

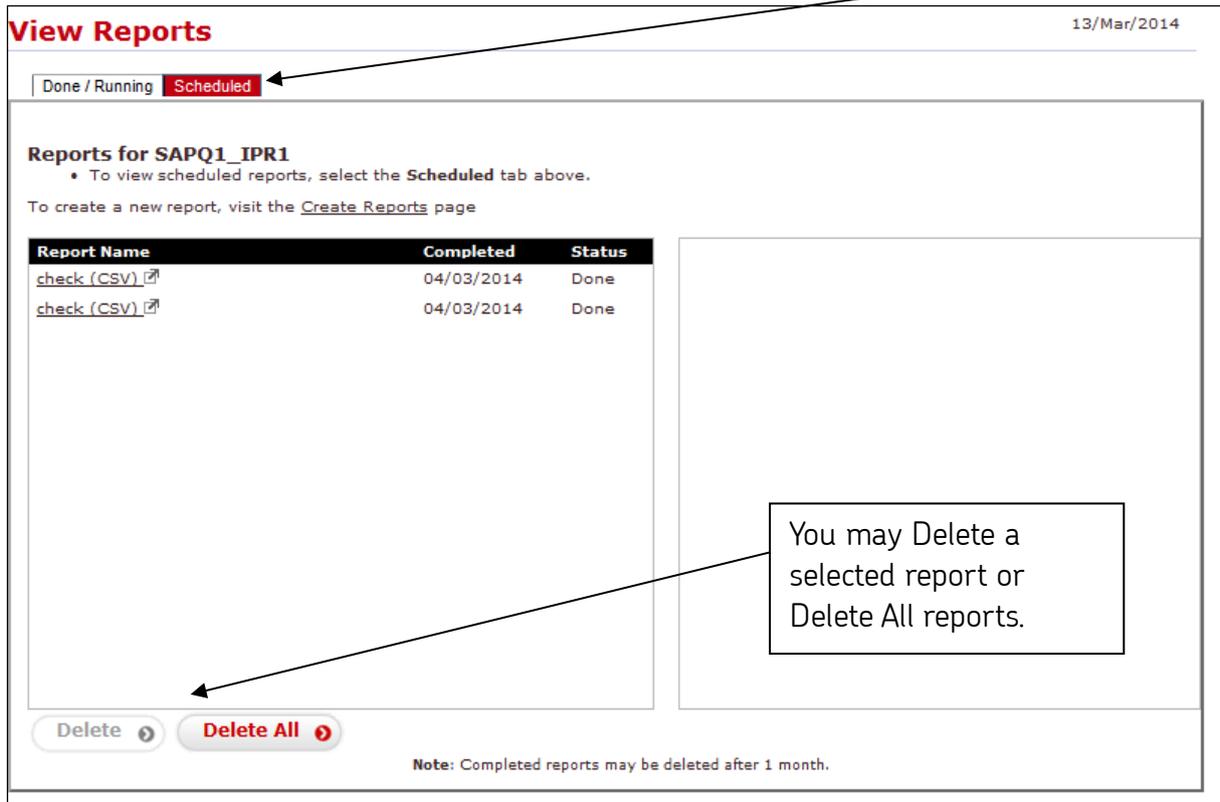
This feature allows you sending automatically this report each time it is launched to an e-mail address or a list of e-mail addresses. Enter the address(es) in the text field below. If you enter several addresses, please separate them with a semicolon and a space (ex: email1@company.com; email2@company.com)

The report can be scheduled daily, weekly or monthly. Also, you can choose from which day of the week you would like to start this schedule.

For example, if you were running a weekly report, you could specify Wednesday as the day to start the report. So it would be a

You can send the reports to specific email addresses if needed by checking the box and entering the address in the space provided

NOTE: Once a report has been scheduled, it will be available in the 'View Reports' menu 'Scheduled' tab as shown below



View Reports 13/Mar/2014

Done / Running **Scheduled**

Reports for SAPQ1_IPR1

- To view scheduled reports, select the **Scheduled** tab above.

To create a new report, visit the [Create Reports](#) page

Report Name	Completed	Status
check (CSV)	04/03/2014	Done
check (CSV)	04/03/2014	Done

You may Delete a selected report or Delete All reports.

Delete Delete All

Note: Completed reports may be deleted after 1 month.

To view a completed Scheduled Report, select the **Done / Running** tab above and double click on the corresponding hyperlink, and then save the report.

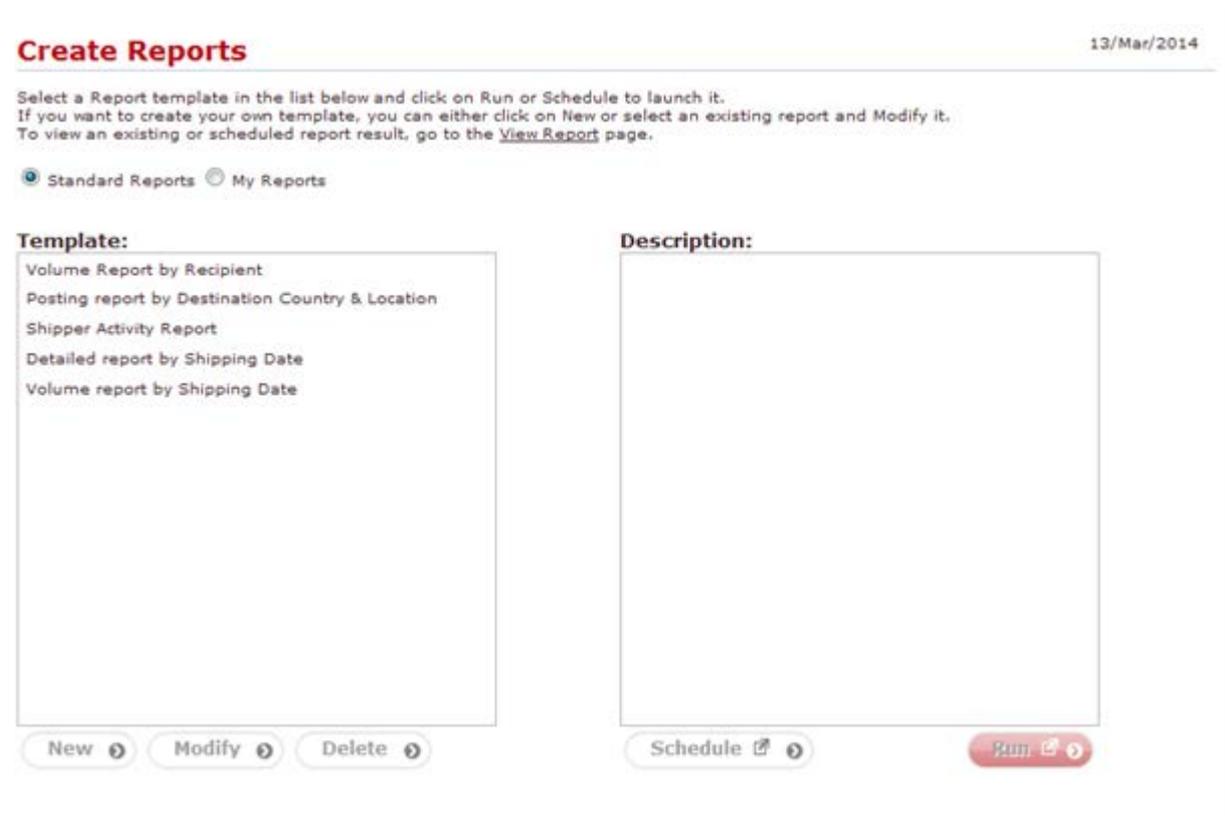
Running Reports

Create Reports

From the Archive main menu option, highlight and click on Reporting. Click on Create Reports.

Highlight your chosen report from the Standard Reports tab or My reports tab and click the

 button below:



Create Reports 13/Mar/2014

Select a Report template in the list below and click on Run or Schedule to launch it.
If you want to create your own template, you can either click on New or select an existing report and Modify it.
To view an existing or scheduled report result, go to the [View Report](#) page.

Standard Reports My Reports

Template:

- Volume Report by Recipient
- Posting report by Destination Country & Location
- Shipper Activity Report
- Detailed report by Shipping Date
- Volume report by Shipping Date

Description:

If you have not specified an email address in the report template, the report will be saved as a PDF or CSV file within DMO 'View Reports' for accessing later. See next section for 'Viewing Reports'

Viewing Reports

From the Archive main menu option, highlight and click on Reporting. Click on View Reports.

To view a report, click on the Done/ Running tab below, and highlight the selected report. The report then opens in a new window as shown below.

The screenshot shows the 'View Reports' interface. At the top right, the date '21/May/2013' is displayed. Below the title, there are two tabs: 'Done / Running' and 'Scheduled'. The 'Scheduled' tab is active. The main content area is titled 'Reports for chrisv' and includes instructions: 'To view scheduled reports, select the Scheduled tab above.' and 'To create a new report, visit the Create Reports page'. A table lists reports with columns 'Report Name', 'Completed', and 'Status'. The report 'number since opened (PDF)' is highlighted. An arrow points from this report to a detailed view window. The detailed view window is titled 'Report: number since opened' and contains the following information:

- Created on: 21/05/2013
- Period of selection: From 01/05/2013 to 20/05/2013
- Non default selection criteria: None

Carrier	Shipment Date	Items
ROYAL MAIL	01/05/2013	1
ROYAL MAIL	01/05/2013	1
ROYAL MAIL	01/05/2013	1
ROYAL MAIL	08/05/2013	1
ROYAL MAIL	09/05/2013	1
ROYAL MAIL	20/05/2013	1
ROYAL MAIL	20/05/2013	1

At the bottom of the detailed view window, there are two buttons: 'Delete' and 'Delete All'. A note at the bottom states: 'Note: Completed reports may be deleted after 1 month.'

The system presents the option to send the report to one or more email addresses:

The dialog box contains the text: 'Do you want to send this report to one or several email addresses?'. Below the text are two buttons: 'Yes' and 'No'.

If the 'Yes' option is selected, an opportunity to enter one or more email addresses is presented:

The form contains the text: 'Enter the address(es) in the text field below. If you enter several addresses, please separate them with a semicolon and a space (ex: email1@company.com; email2@company.com)'. Below the text is a text input field containing the email addresses: 'email1@company.com; email2@company.com'. At the bottom of the form are two buttons: 'Cancel' and 'Continue'.

If the 'No' option is selected, the user is directed to the View Reports screen/Done Running Tab to view the report.

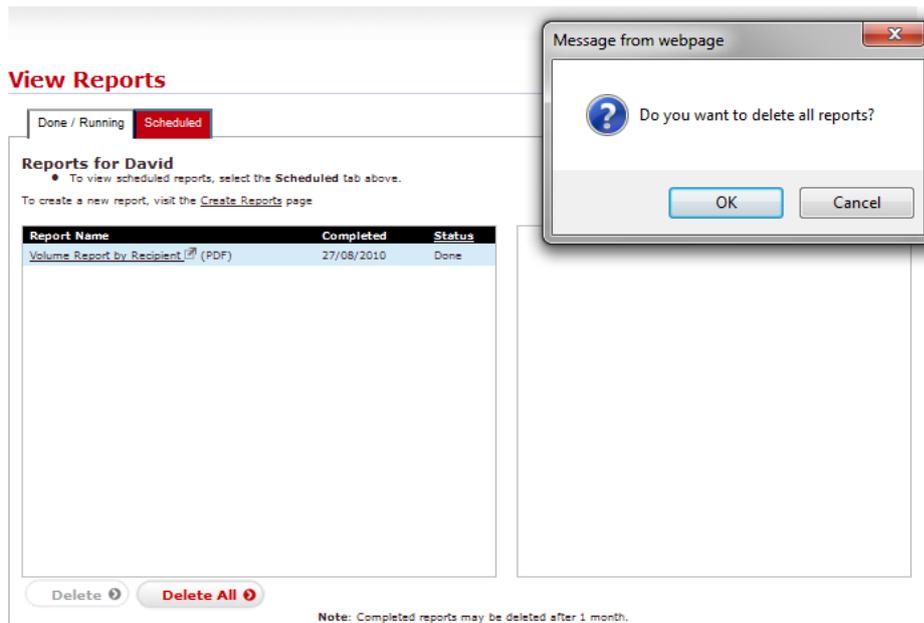
Deleting a Scheduled Report

Select the **Scheduled** tab and then the report to be deleted and click on the **Delete** button. Alternatively you can delete all completed reports by selecting the **Delete All** button - DMO will ask for confirmation as shown below.

Delete

Delete All

Applying the **OK** button below will permanently delete the report(s) selected.



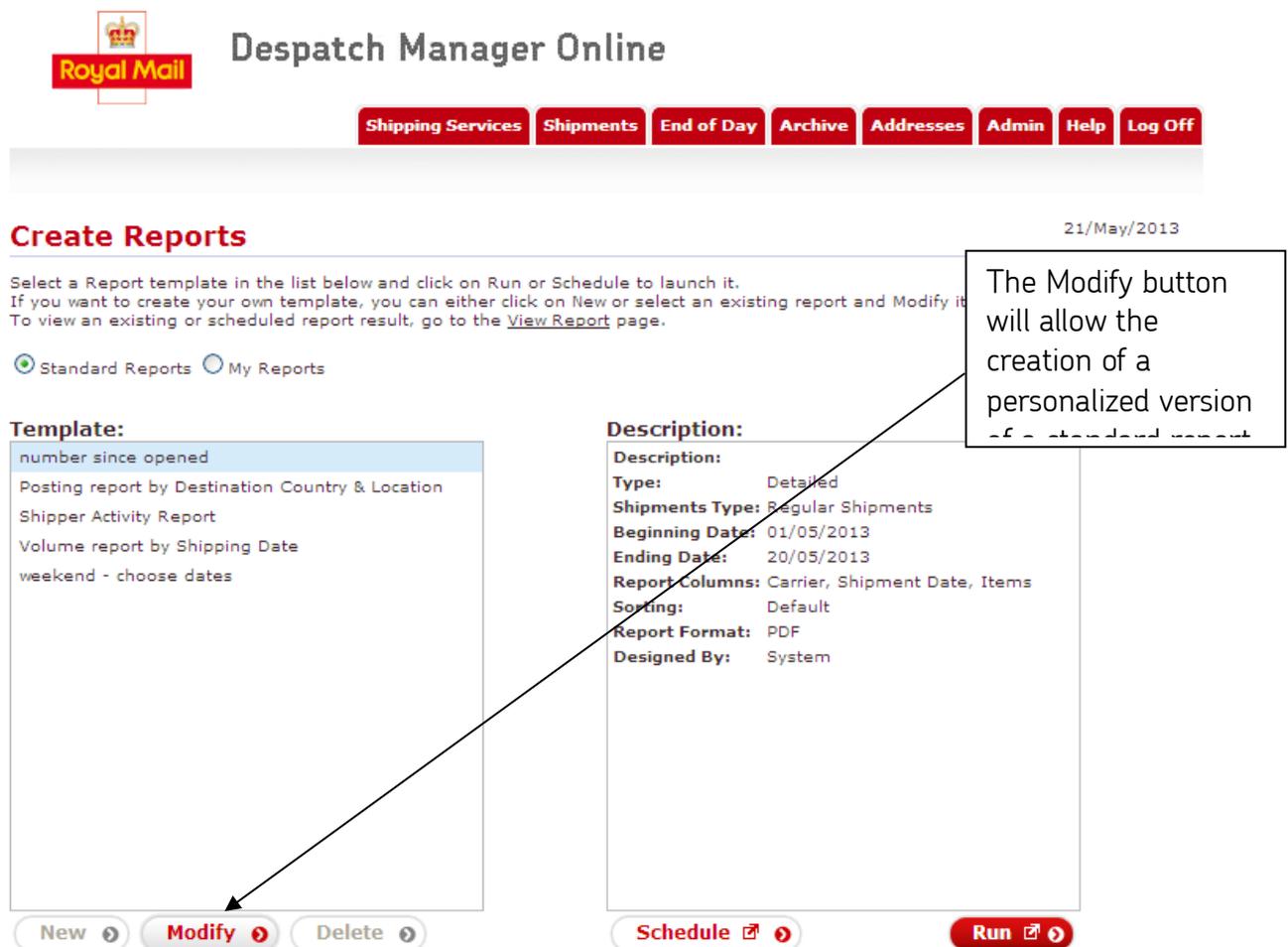
Individual reports may be deleted by the system after one month.

Modifying Standard Reports

The Modify functionality allows for a user-defined customization of Standard Reports. The created report can be saved with a unique name and viewed using the My Reports check box on the Create Reports screen.



To modify any of the five existing Standard Reports, highlight the report of choice and click on the **Modify** button as shown below.



Clicking the 'Modify' button will start the 'Creating a Report wizard'.

The only difference between the 'Create report' via the 'New' button and 'Modify' button is that the modify button will hold the existing report information to be customized.

See the 'Creating Report' screen below for details of the reporting wizard.

Creating a Report - Step 1 08/feb/2015

Name:

Description:

Type: Detailed Summarized

1st:

2nd:

3rd:

4th:

5th:

6th:

7th:

In summary mode, the report will allow the selected summary fields above, and the following calculated fields.

Report Columns

- Total Items
- Total Weight
- Shipments Number
- Posting Location Number
- Posting Location Name
- Total labels printed
- Number Range Allocation Size
- Number of Labels Reprinted
- Active Start Range No
- Active End Range No
- % Used
- Status

Sample Report
 Drag and drop the report columns to change their order.

Shipper Location	Service Reference	Service	Account Number	Contract Number	Shipments Number	Number Range Allocation Size	Total Items	Total Weight	Number of Labels Reprinted
[Shipper Location]	[Service Reference]	[Service]	[Account Number]	[Contract Number]	[Shipments Number]	[Number Range Allocation Size]	[Total Items]	[Total Weight]	[Number of Labels Reprinted]
Total Account Number				Sum (Shipments Number)	Sum(Number Range Allocation Size)	Sum (Total Items)	Sum (Total Weight)	Sum(Number of Labels Reprinted)	

Sorting: 1st: [Show more sorting options](#)

Creating or Modifying a Report - Step 2

Select the main parameters for your reports

Shipping Dates

Relative Dates

Absolute Dates

Within the last

From:

To:

Format

PDF

HTML

TEXT (CSV)

Separator:

Delimiter:

Selection Options

You can also select part of the shipments with these selection options:

Service Reference

Service Reference 1
Service Reference 2
Service Reference 4
Service Reference 5
Service Reference 3

Carrier

Royal Mail

Service / Service Format

1ST AND 2ND CLASS ACCOUNT MAIL / Inland Large Letter
1ST AND 2ND CLASS ACCOUNT MAIL / Inland Large Letter
1ST AND 2ND CLASS ACCOUNT MAIL / Inland Letter
1ST AND 2ND CLASS ACCOUNT MAIL / Inland Letter
1ST AND 2ND CLASS ACCOUNT MAIL / Inland Parcel

Customer Collection Receipt Number

You can define one or several Customer Collection Receipt Number by writing their number separated with a semicolon

NOTE: Search criteria will be saved in uppercase to enhance performance.

Sender's Reference

is

Shipment Number

is

Recipient Code

is

Name

is

Postalcode

is

Town

is

Country

AFGHANISTAN
ALAND ISLANDS
ALBANIA
ALGERIA
ANDORRA

Items Number

=

Weight

=

Send the report by email

This feature allows you sending automatically this report each time it is launched to an e-mail address or a list of e-mail addresses.

Enter the address(es) in the text field below. If you enter several addresses, please separate them with a semicolon and a space (ex: email1@company.com; email2@company.com)

[Back](#)

[Save](#)

[Save & Run](#)

[Save & Schedule](#)

Select desired date options and ranges

Select options such as Service Reference, Shipper Location(s), Service and Service Format

You may limit report to specific: Customer Collection Receipts, Reference Numbers, Shipment Numbers, Recipient Information, Items and Weight

Menu options to Save, Save and Run or Save and Schedule personalized report

For example, if a custom report is created, saved and scheduled, it will appear in the My Reports list for the Admin user as well as the list of scheduled reports as shown below:

Create Reports 25/Aug/2010

Select a Report template in the list below and click on Run or Schedule to launch it.
If you want to create your own template, you can either click on New or select an existing report and Modify it.
To view an existing or scheduled report result, go to the [View Report](#) page.

Standard Reports My Reports

Template:

Olas Barcode Allocation Report

Description:

New Modify Delete Schedule Run

Personalized 'Olas Barcode Allocation Report' in 'My Reports' and in 'View Reports' as scheduled weekly

View Reports

Done / Running Scheduled

Reports for RMCC

To view completed reports, select the Done/Running tab above.
To create a new report, visit the [Create Reports](#) page

Report Name	Scheduled	Next Runs
Barcode allocation	Daily	26/08/2010
Collection & Returns : Number ...	Daily	26/08/2010
Number of shipments per Carri...	Weekly	27/08/2010
Number of shipments per Carri...	Daily	26/08/2010
Number of shipments per Date ...	Daily	26/08/2010
Olas Barcode Allocation Report	Weekly	30/08/2010
User Label Reprint Report	Monthly	01/09/2010

Delete Delete All Reschedule

Creating a Custom Report

When creating a customized standard report, a user has the option to create either a summarized or detailed report.

The selection of the detailed check button will allow the user to define precise column headings and options. Selection of the summarized button will display total column headings.

Using both options, a user can:

- Define a report name
- Define report description
- Select desired report columns
- Arrange column headings in desired order using the simple drag and drop action
- Define multiple sorting options based on specific fields name in ascending or descending order

Detailed Report

Shipping Services **Shipments** **End of Day** **Archive** **Addresses** **Admin** **Help** **Log Off**

Archived Shipments
Reporting
[Create Report](#)
View Report
Audit Reporting
[Create Audit Report](#)
[View Audit Report](#)

06/Feb/2015

Creating a Report - Step 1

Name

Description

Type Detailed Summarized

Report Columns

<input type="checkbox"/> Shipper Location Name	<input type="checkbox"/> Customer Collection Receipt Number	<input type="checkbox"/> Sender's Reference 3
<input type="checkbox"/> Service Reference Name	<input type="checkbox"/> Customer Collection Receipt Date	<input type="checkbox"/> Sender's Reference 4
<input type="checkbox"/> Carrier	<input type="checkbox"/> Delivery Date	<input type="checkbox"/> Sender's Reference 5
<input type="checkbox"/> Service	<input type="checkbox"/> Original Shipment Number	<input type="checkbox"/> Shipper Mailbox
<input type="checkbox"/> Shipping Date	<input type="checkbox"/> Recipient Summary	<input type="checkbox"/> Email Notification
<input type="checkbox"/> Account Number	<input type="checkbox"/> Recipient Address Code	<input type="checkbox"/> Labels printed
<input type="checkbox"/> Shipment number	<input type="checkbox"/> Recipient Name	<input type="checkbox"/> Contract Number
<input type="checkbox"/> 2D Item ID	<input type="checkbox"/> Recipient Complementary Name	<input type="checkbox"/> Department Reference
<input type="checkbox"/> Unique Item ID	<input type="checkbox"/> Recipient Address Line 1	<input type="checkbox"/> Customer Reference
<input type="checkbox"/> 2D Item ID (Hex Value)	<input type="checkbox"/> Recipient Address Line 2	<input type="checkbox"/> Your Reference
	<input type="checkbox"/> Recipient Address Line 3	<input type="checkbox"/> Your Description
	<input type="checkbox"/> Recipient Postcode	<input type="checkbox"/> Service Enhancement
	<input type="checkbox"/> Recipient Town	<input type="checkbox"/> Service Enhancement 2
	<input type="checkbox"/> Recipient Country Code	<input type="checkbox"/> Service Enhancement 3
	<input type="checkbox"/> Special Instructions	<input type="checkbox"/> Service Enhancement 4
	<input type="checkbox"/> Items	<input type="checkbox"/> Service Enhancement 5
	<input type="checkbox"/> Weight	<input type="checkbox"/> Channel
	<input type="checkbox"/> Sender's Reference 1	
	<input type="checkbox"/> Sender's Reference 2	

[Show fewer options](#)

Summarized Report

Shipping Services Shipments End of Day Archive Addresses Admin Help Log Off

Creating a Report - Step 1

06/Feb/2015

Name

Description

Type Detailed Summarized

1st Shipper Location
2nd Shipper Location
3rd Service Reference
4th Carrier
5th Service
6th Shipping Date
7th Customer Collection Receipt Number
Recipient Summary
Recipient Address Code
Recipient Name
Recipient Address Line 1
Recipient Town
Recipient Postcode
Recipient Country Code
Account Number
Contract Number
Shipment Number
Sender's Reference
Shipment Creation Date
Channel

In summary mode, the report will show the selected summary fields.

Report Columns

- Total Iter
- Total We
- Shipmen
- Posting L
- Posting L
- Total labels printed
- Number Range Allocation Size
- Number of Labels Reprinted
- Active Start Range No
- Active End Range No
- % Used
- Status

Sample Report
Drag and drop the report columns to change their order.

Shipper Location
[Shipper Location]
Grand Total

The order in which the report columns are selected in will determine the order they appear in the final report.

Creating or Modifying a Report - Step 2

08/Feb/2015

Select the main parameters for your reports:

Shipping Dates

Relative Dates

Within the last:

Calendar Week:

Absolute Dates

From: 1 Feb 2014

To: 1 Feb 2015

Allows user to select desired date options and ranges

Format

PDF

HTML

TEXT (CSV)

Separator:

Delimiter:

Selection Options

You can also select part of the shipments with these selection options:

Service Reference

Service Reference 1
Service Reference 2
Service Reference 4
Service Reference 5
Service Reference 3

Defining Report Format

Carrier

Royal Mail

Service / Service Format

1ST AND 2ND CLASS ACCOUNT MAIL / Inland Large Letter
1ST AND 2ND CLASS ACCOUNT MAIL / Inland Large Letter
1ST AND 2ND CLASS ACCOUNT MAIL / Inland Letter
1ST AND 2ND CLASS ACCOUNT MAIL / Inland Letter
1ST AND 2ND CLASS ACCOUNT MAIL / Inland Parcel

Allow user to define: Service References, Products, Customer Collection Receipts or word specific criteria, Country or by Item and Weight.

Customer Collection Receipt Number

You can define one or several Customer Collection Receipt Number by writing their number separated with a semicolon or by a dash to define a range.

NOTE: Search criteria will be saved in uppercase to enhance performance.

Sender's Reference

ia

Shipment Number

ia

Recipient Code

ia

Name

ia

Postcode

ia

Town

ia

Country

AFGHANISTAN
ALAND ISLANDS
ALBANIA
ALGERIA
ANDORRA

Menu options to Save, Save and Run or Save and Schedule personalized report

Item Number

-

Weight

-

Send the report by email

This feature allows you sending automatically this report each time it is launched to an e-mail address or a list of e-mail addresses.

Enter the address(es) in the text field below. If you enter several addresses, please separate them with a semicolon and a space (ex: email@company.com; email@company.com)



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