User Guide

CSR Matrix
V21.1.0200

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EFI PrintStream | *V21.1.0200 CSR Matrix User Guide*

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Table of Contents

Introduction 4
Overview 4
Contact Information 4
Create a Report 5
Run Existing Report 10
Edit/Change a Report 11
Delete a Report 12
Create Special Events 13

Introduction

Overview

CSR Matrix was designed to aid in the creation of a Schedule Report for job processes by CSR's or Sales Reps, enabling them to follow jobs and know when critical events are scheduled (i.e., used for milestones like sign offs); so CSR's and salespeople can print this report instead of looking through an entire schedule. These reports are also beneficial for department managers, etc.

Examples of benefits:

1. Create a "samples due" listing.
2. View when sign offs are scheduled.
3. View when press checks are scheduled.

You can select what you want the report to include and how you want to filter it (i.e., all sales reps, CSR's, or combination) to enable team reporting.

Contact Information

EFI Support

US Phone:	855.334.4457 (first select option 3, then press option 8, then press option 1)
US Fax:	415.233.4157.
US E-mail:	printstream.support@efi.com

Regular Service Desk hours are 8:00 AM to 7:00 PM Central Time, Monday – Friday. Outside of these hours, you may leave a voice mail message and an on-call support representative will be paged. Response time is based on the severity of the issue.

Note For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues.

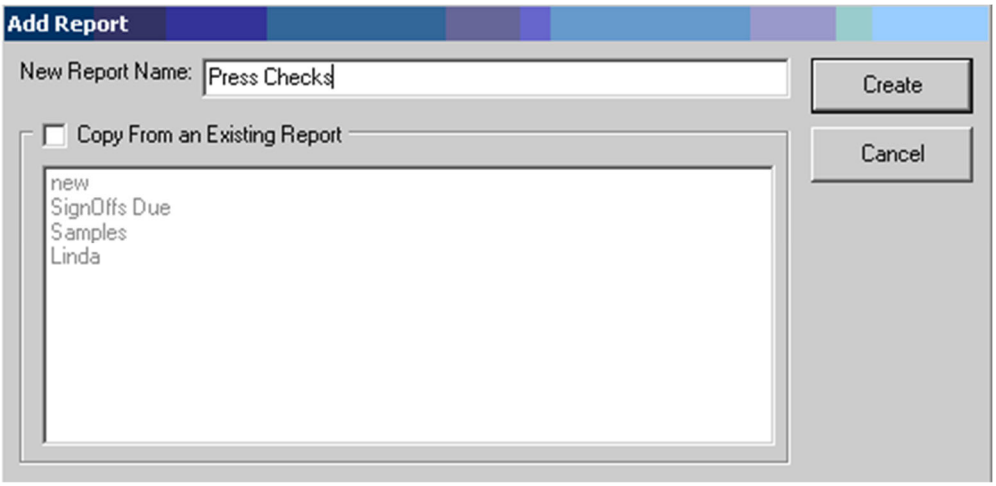
EFI Professional Services

US Phone:	651.365.5321
US Fax:	651.365.5334
E-Mail:	ProfessionalServicesOperations@efi.com

EFI Professional Services can help you perform EFI software installations, upgrades, and updates. This group can also help you implement, customize, and optimize your EFI software plus offer a range of training options.

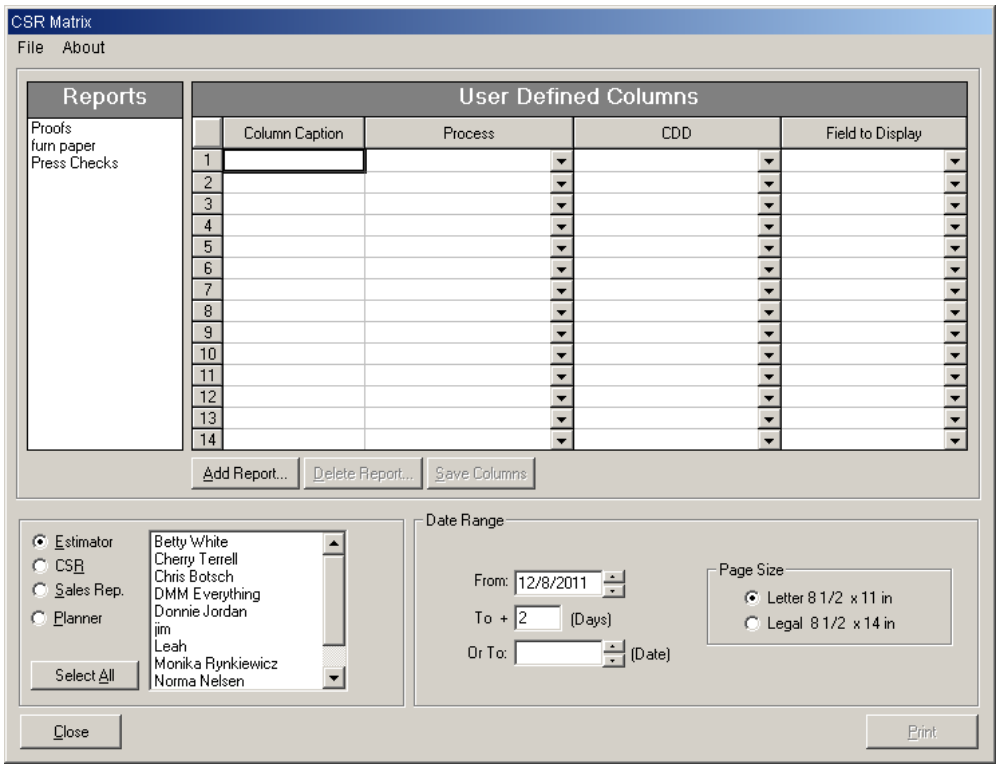
Create a Report

1. Open the CSR Matrix.
2. Select **Add Report**.



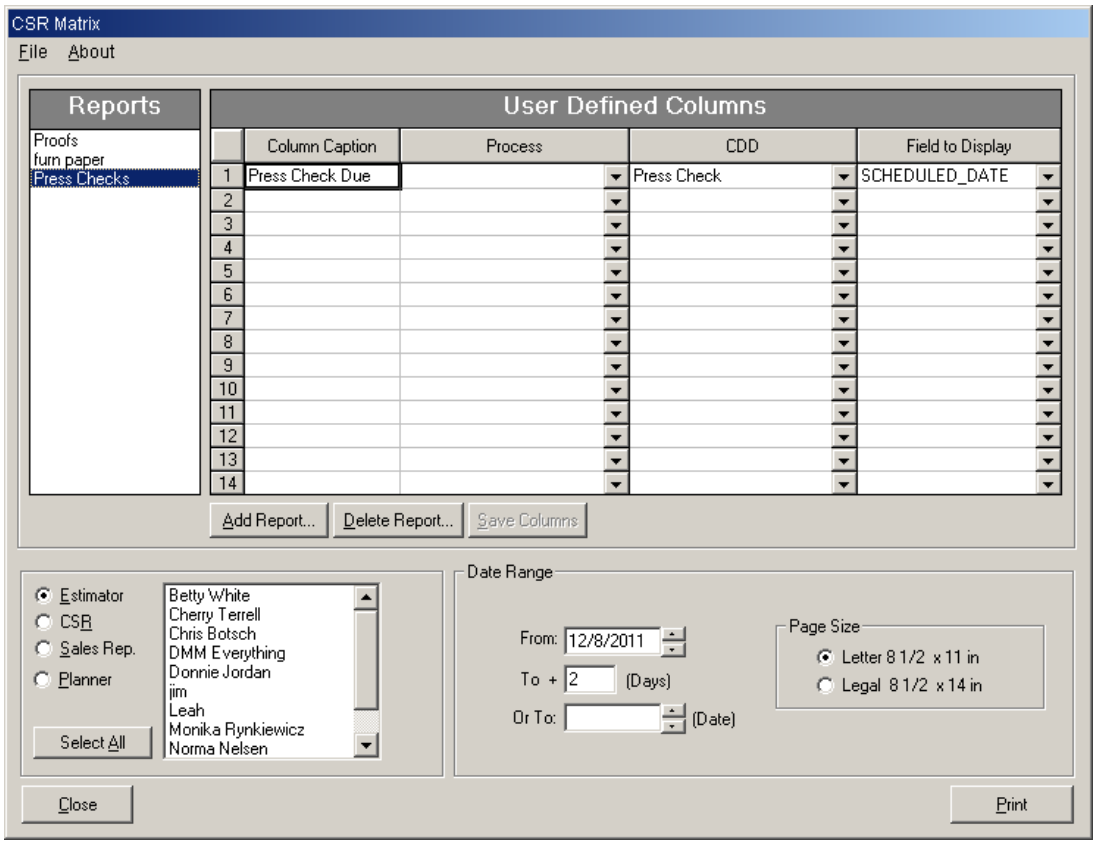
3. Enter a New Report Name (i.e., Press Checks).
4. Select **Create**.

   The report displays in the left column.

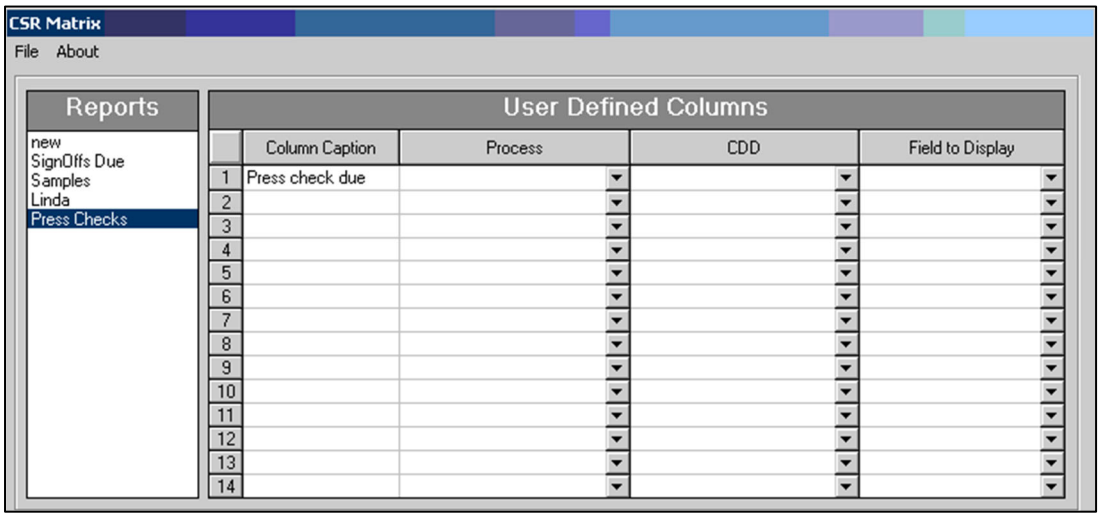


5. Highlight the Report to define the columns.

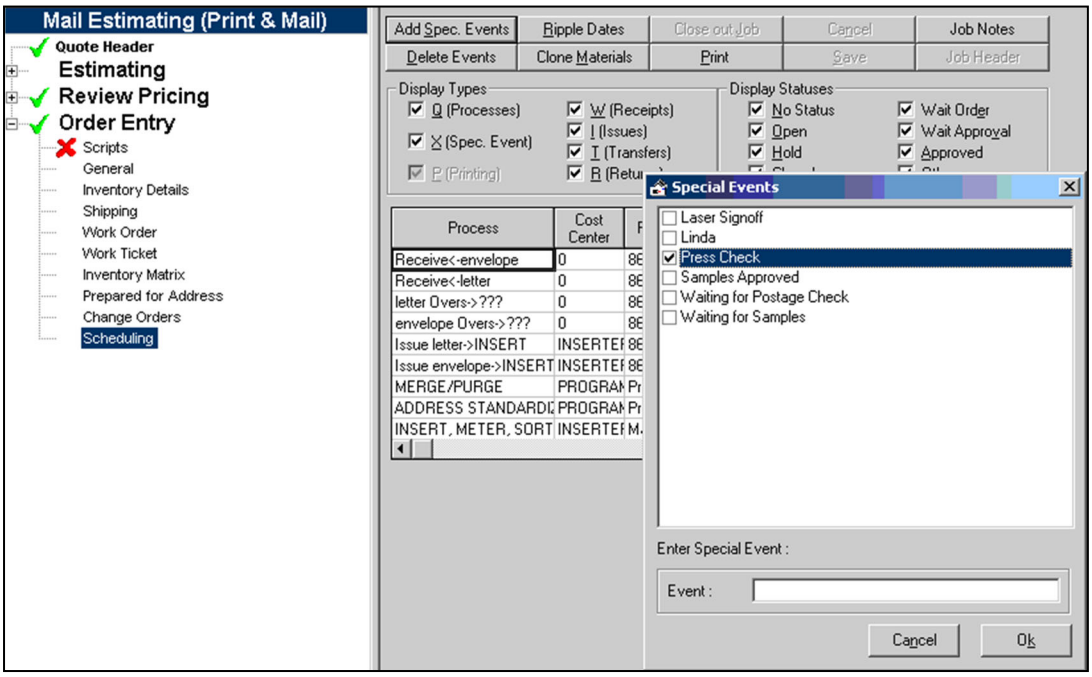
   When the Report is highlighted on the right, the User Defined Columns grid will display columns that have been defined within the grid. In the example above, NO columns have been defined; in the example below the columns have been defined:



6. Using the first example: **Press Checks**, highlight the Report and start to define the columns on the right:



- **Column Caption**: Free form field on the report. The column header for the fields defined.
- **Process**: Drop down box. These are YOUR activities as defined in your system. (Master Files)
- **CDD**: Drop down box. These are the special events specific to YOUR company as seen in **Estimating > Order Entry > Scheduling > Spec. Events**.

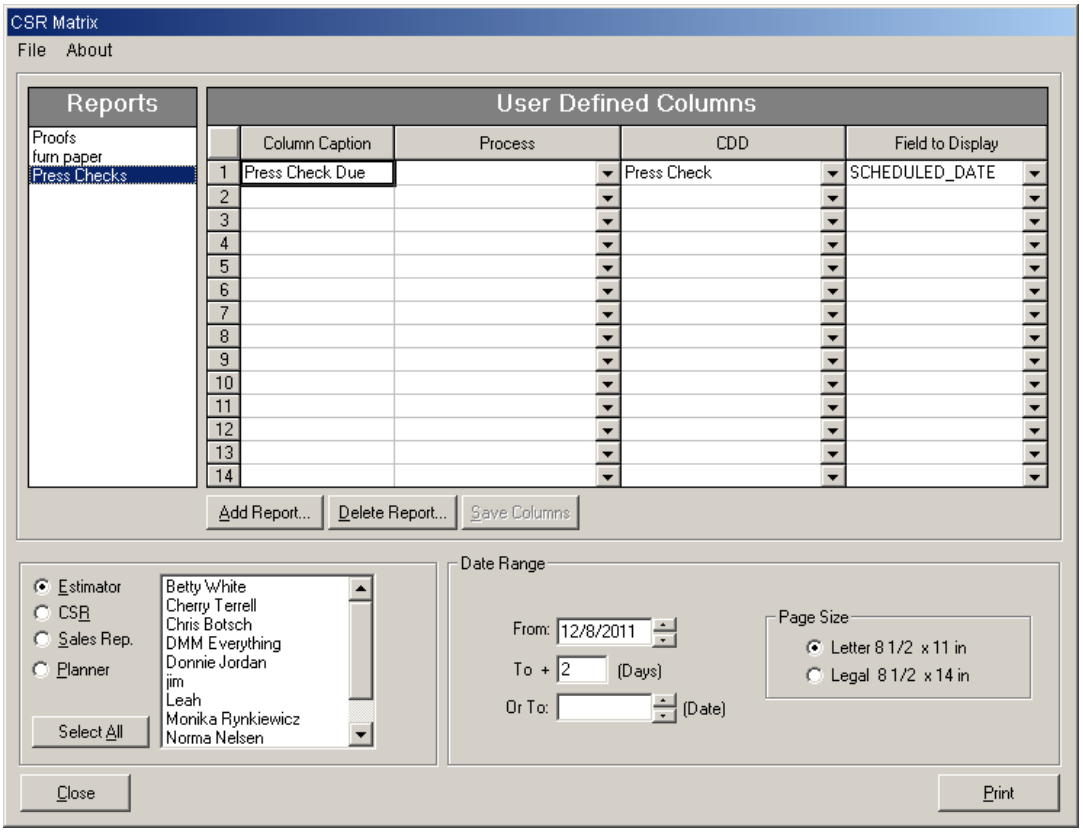


Note To Create Special Events, please see the end of this document for instructions.

- **Field to display**: Drop down field. Corresponds to table data.

Note For each line, either choose a **Process** OR a **CDD** – both CANNOT be chosen.

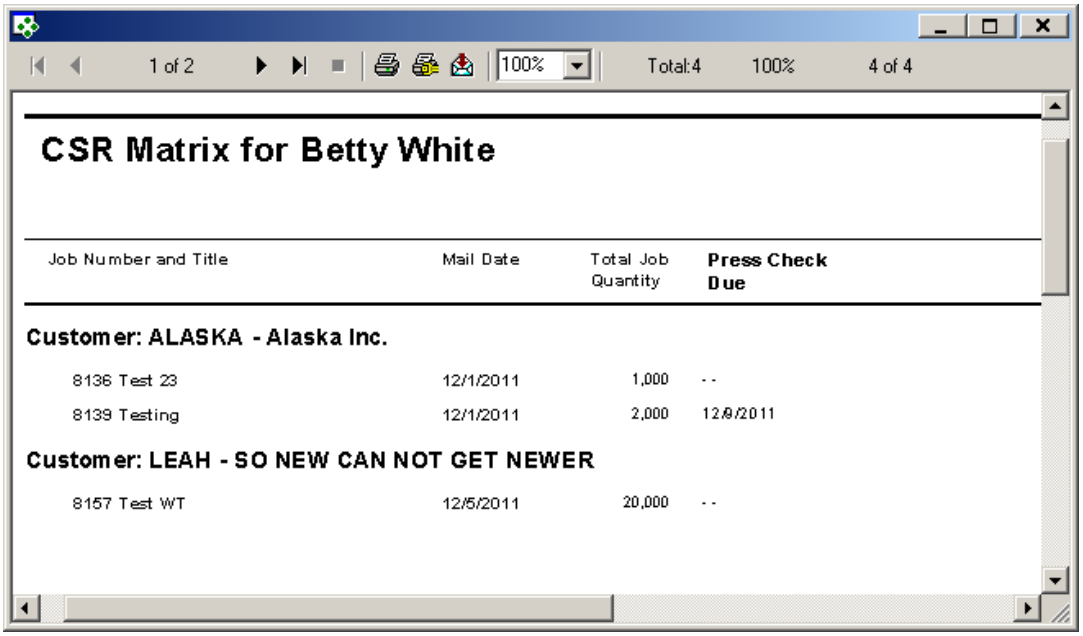
A report may be complex or as simple as the example below.



7. Remember to **Save Columns** after you have made the initial entries or when changes are made to save.
8. To print the report, select the report, filter by **Employee Type, Date Range** and **Page Size** and Print to run. To choose more than one person but not all, hold the Ctrl key and select the names.

Note In the date range, the date it is looking at for the jobs is the FIRST Mail DATE.

The report as defined above will display as follows:



Note Numerous reports can be created and existing reports can also be edited.

Additional Notes Job Number and description of the job are by default included on the report; no need to add a separate line for this.

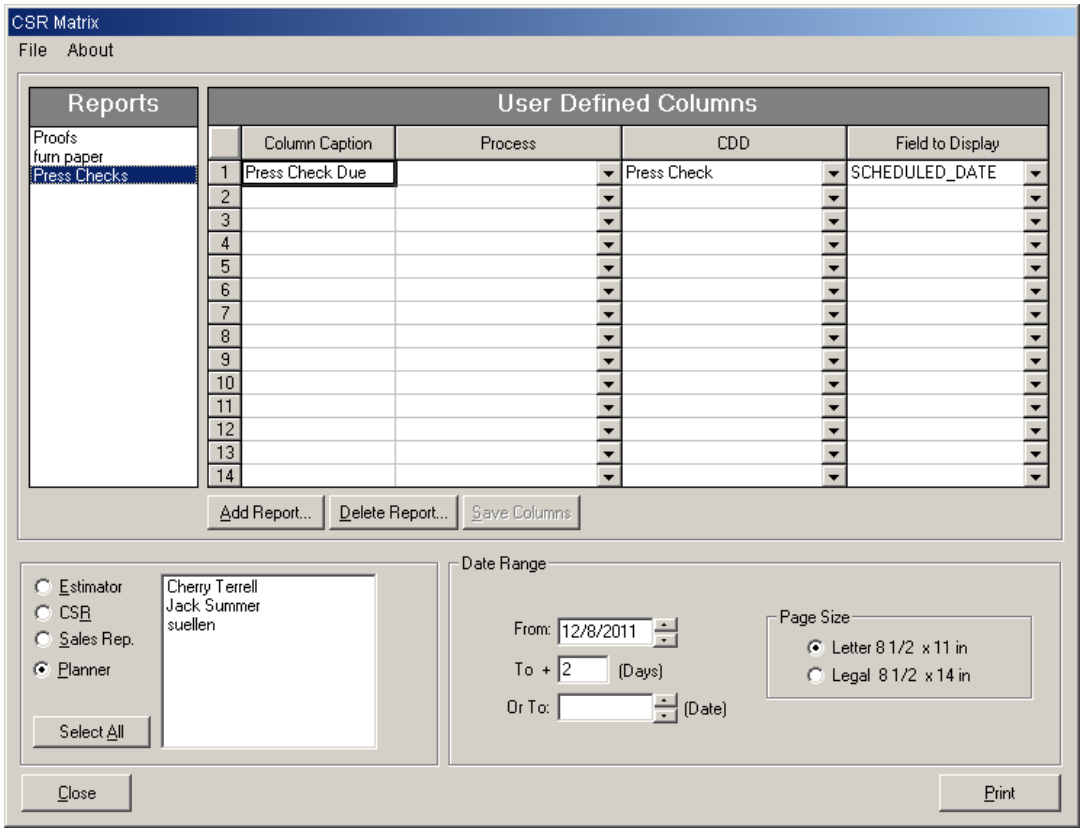
Each CSR, Sales Rep, or Estimator will print out on a separate page.

Recommended to preview the report until satisfied all columns, etc., is defined as needed.

Run Existing Report

1. Open the **CSR Matrix**.

   The program opens to a list of reports already created and are displayed in the left column of the grid.
2. Select the Report and filter by **Employee Type, Date Range** and **Page Size**.
3. Click **Print** to run the Report.

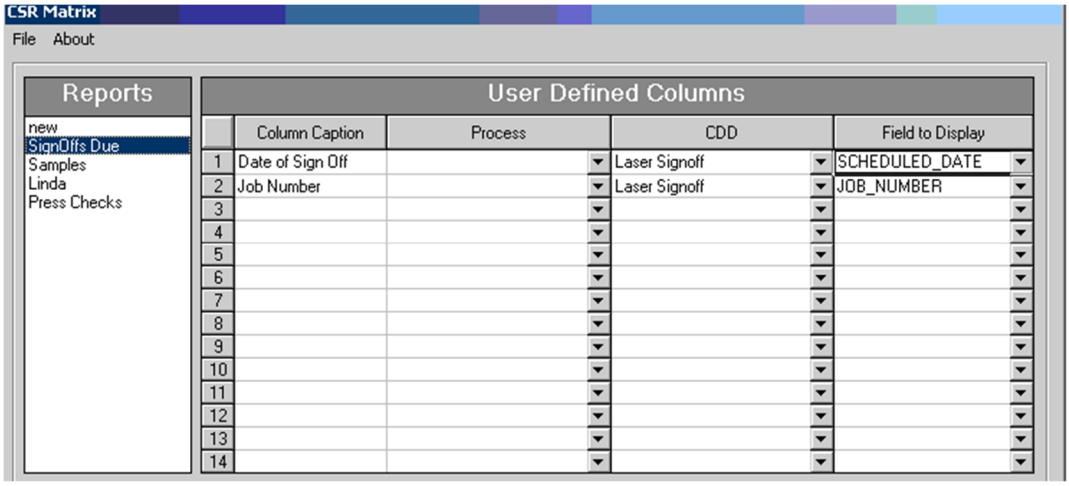


Edit/Change a Report

The ability to add a line or change the order of the current columns in a report is now available. Follow the steps as you would to create a report:

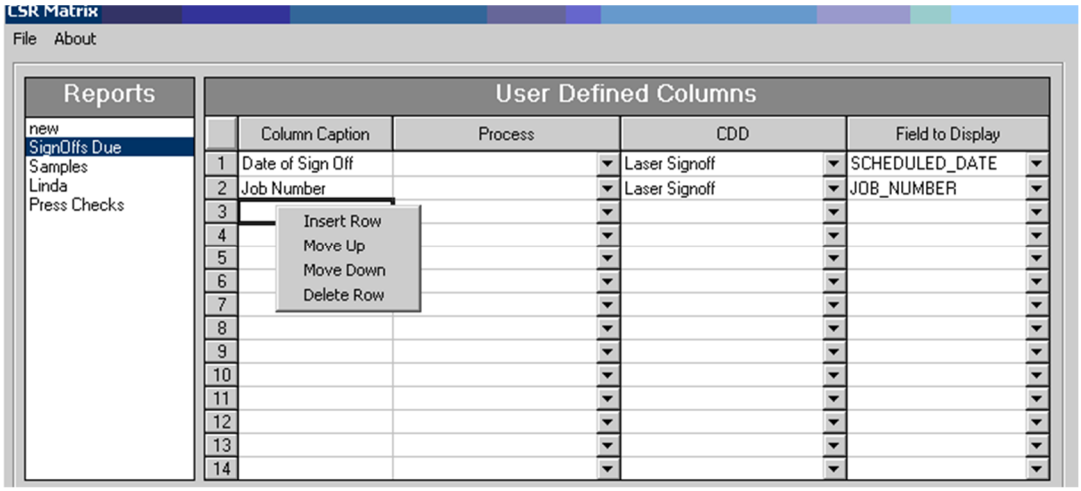
1. Launch CSR Matrix module.
2. Select the report by clicking the report name found under the column Reports.

   All current columns for the report display.



To insert a row / move rows up or down / delete a row

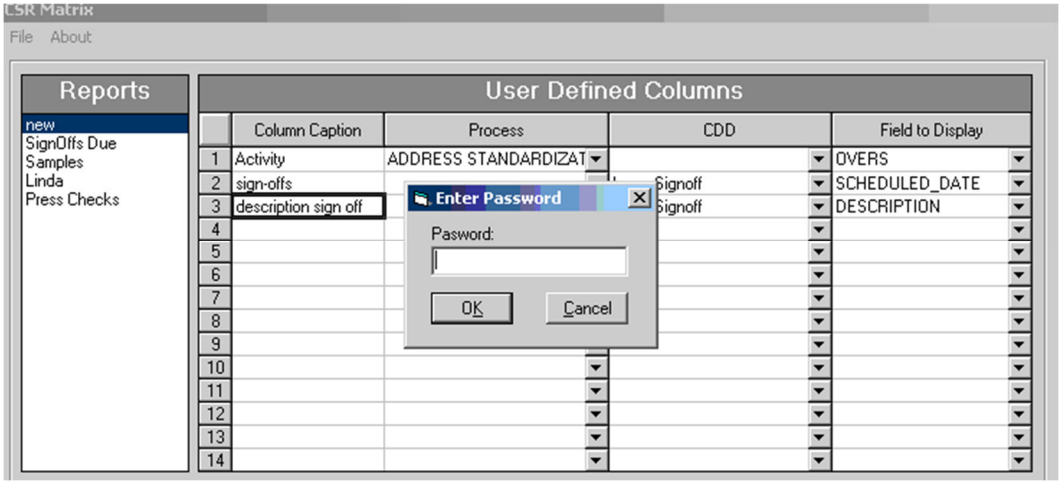
1. Right click the row where you want to make the change to view the selection options – this will highlight the row.
2. Select the appropriate option.
3. Make changes.
4. Click **Save**.



Delete a Report

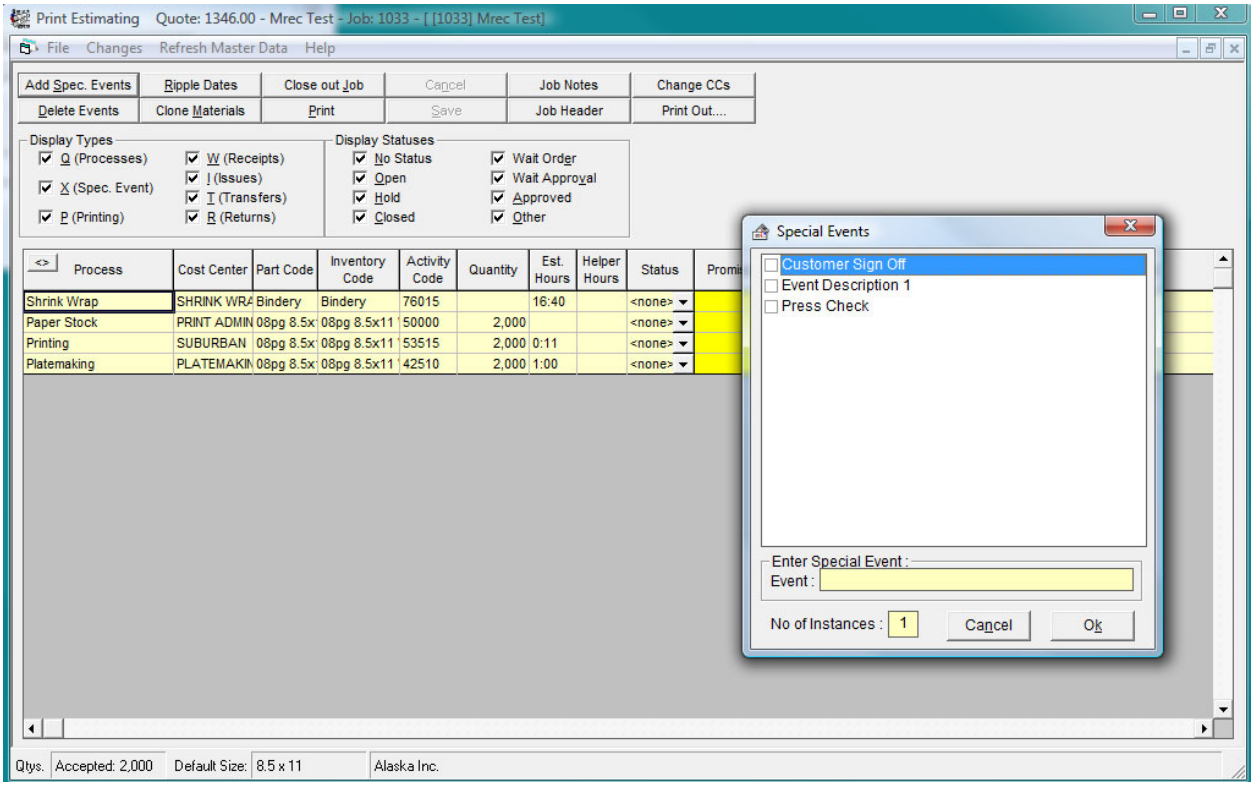
To delete a report

1. Launch **CSR Matrix** module.
2. Select the report by clicking the report name found under the column Reports.
3. Select **Delete Report**.
4. Enter the password when prompted (Intentionally omitted from documentation). Please see your production support representative for the password.

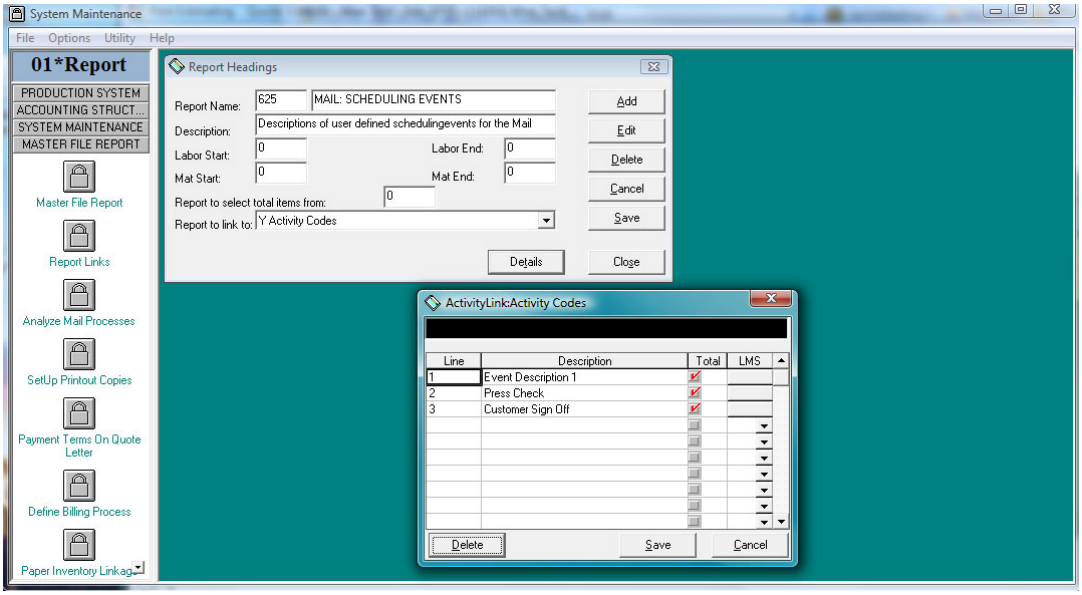


Create Special Events

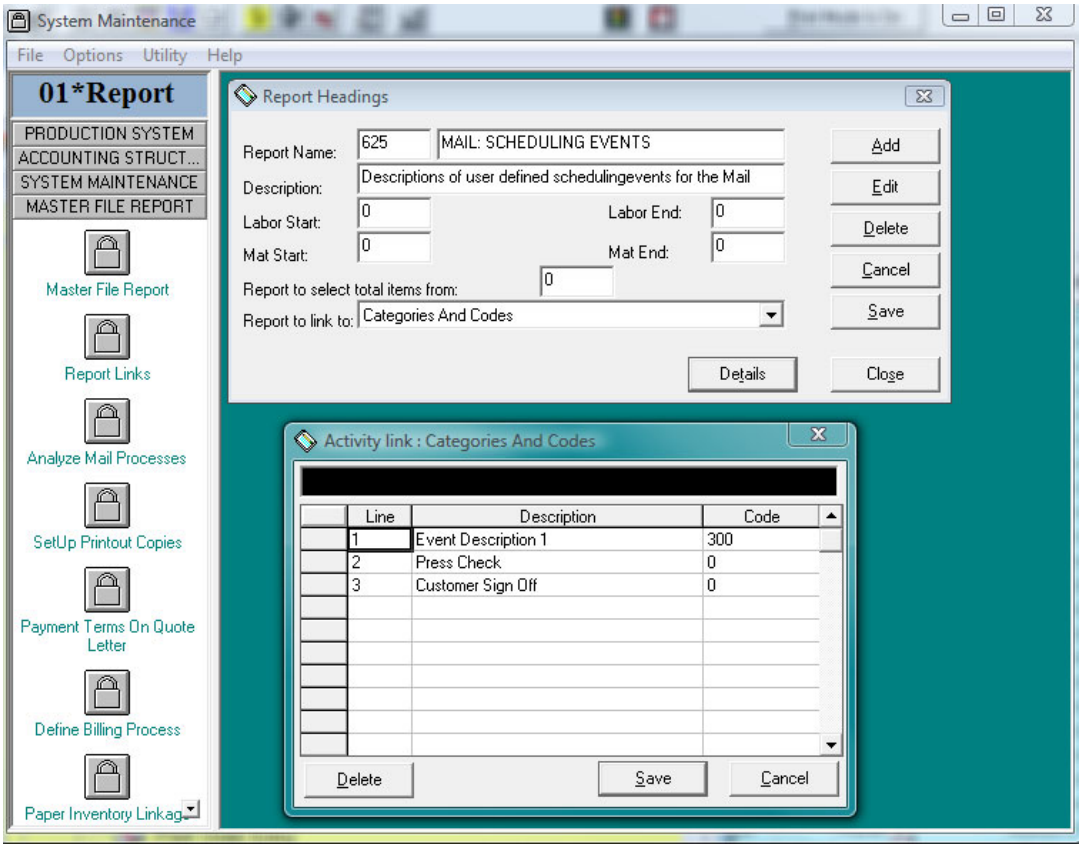
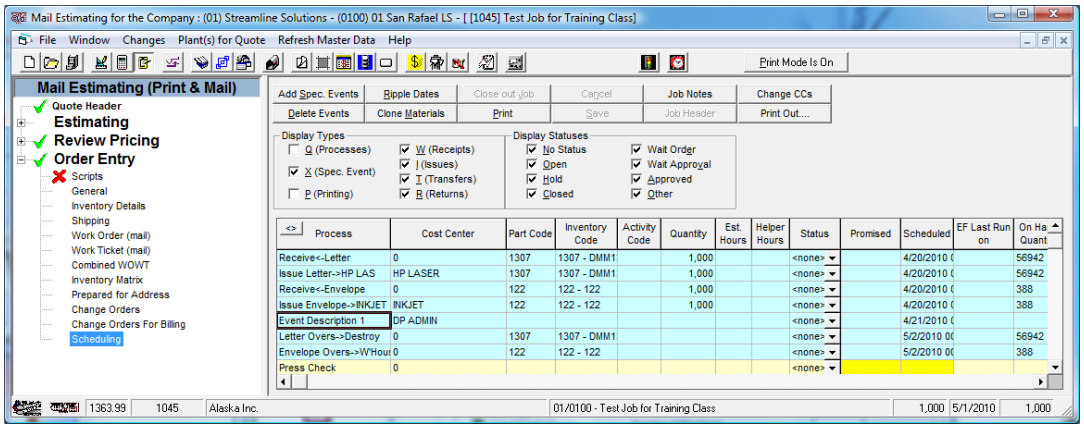
Special Events can be set up in Master Files Reports > Master File Report > Report #625.



1. Select **Details** and enter **Line** and **Description**. Select **Total** and **Save**.



2. To link a Special Event to a Cost Center, change the report link to **Categories** and **Codes** and select **Details**. Enter the **Cost Center** code and **Save**.



Event Description 1 is linked to Cost Center 300 DP ADMIN.