

1on1 Reporting Tools

Instructions for Setting Up the 1on1 User ID Using ERA-IGNITE Security Maintenance

1on1 Reporting Tools creates your reports by pulling data from your ERA system, using a dedicated “data” pc and a User ID that you set up for us.

- Contact your **ERA System Administrator**. That person should log in to the **ERA-IGNITE “SEC” Security Application** (*note: this is different than ERA screen 6210 User Security*), and set up the following access to Dynamic Reporting for your 1on1 Reporting Tool. Note: Dynamic Reporting is available to all R+R dealers, even if you are not signed up for ERA-IGNITE.
- Open ERA-IGNITE and log in as ADMIN (or as a user with access to the “SEC” Security Application within ERA-IGNITE).
 - Select **Applications > Security Maintenance**.
 - Add a new User ID by selecting **File > Add/Clone** (a shortcut is “Control+A”).
 - The “Create a User ID” tab should appear. Click the button “Add a new User ID”, then follow the onscreen prompts. Please assign a User ID from the instructions we sent you.
 - Click “F12” to add the new User ID.
- **Define Entry Point:**
 - Select **Subscreens > Basic Profile Information**.
 - Click “Entry Point” lookup button, and give access to all applicable stores and branches.
- **Define Permissions for Dynamic Reporting:**
 - Select **Subscreens > Security Access**.
 - If no access, then press “F5” and select Retail Management Intelligence (RMI) Application.
 - If you have multiple stores that need access, make sure to do each appropriate store.
 - Select the **Access** checkbox for RMI, then press “F12”.
 - Click the “+” (expand) button for RMI, then choose Dynamic Reporting.
 - Right-click and select “Set All” (or, the long way is to click the “+” (expand) button for Dynamic Reporting, then choose All options). We will need to be able to Run Rpt, Add Rpt, Delete Rpt, Edit Rpt, Edit Additional Users, Maintain User-Defined Rpt, Schedule Rpt When Owner.
 - No need to save changes yet. Please proceed to next section.
- **Grant Access to Dynamic Reporting Data Sets:**
 - Select **Subscreens > Dynamic Reporting Data Set Security**.
 - If you have multiple stores that need access, make sure to do each appropriate store.
 - Select each application, as listed below, by clicking the pull-down in the “Run area” (normally, the “**ACCTG**” application will already be selected). Do **NOT** choose “Access to All Data Sets in the Store/Branch” (that option should only be used for upper management). Please provide access to the following data sets:
 - ✓ Accounting (each data set below ends in “-ACCTG”):
 - ACCOUNTS (*for AvS; Exec DOC; Heat Sheet; FloorPlan Rec*)
 - GL (*not needed, unless you have the Executive DOC*)
 - JOURNAL (*for AvS; Expense Analysis*)
 - NVSJOURNAL (*for AvS; Sales Tax*)
 - PSJOURNAL (*for Sales Tax*)
 - ROJOURNAL (*for Sales Tax*)

- SCHEDULE4 (for Heat Sheet; FloorPlan Rec)
 - UVSJOURNAL (for AvS; Sales Tax)
 - ✓ F&I (each data set below ends in "-FANDI"):
 - FIMAST (for Sales Mgr Tool)
 - ✓ Sales (each data set below ends in "-SALES"):
 - NVINVBK (for New Vehicle Inventory - History)
 - NVINVENTORY (for New Vehicle Inventory - Current)
 - UVINVBK (for Used Vehicle Inventory - History)
 - UVINVENTORY (for Used Vehicle Inventory - Current)
 - ✓ Service (each data set below ends in "-SERVC"):
 - AA.SER.WIP (for Service Mgr Tool – RO transactions)
 - SERVCODE (for Service Mgr Tool - OpCodes)
 - WIPLABOR (for Service Mgr Tool – RO transactions)
- **Grant Access to specific ERA Applications:**
 - Select **Subscreens > ERA Application and Program Security**.
 - At the top of the screen, under "Application Access", you should see the following applications for each appropriate store (if you have multiple stores that need access, make sure each appropriate store is listed): Accounting, F&I, Sales, Service.
 - If you do NOT see the Accounting, F&I, Sales, Service applications, then press the "F5" button, then select the appropriate applications for the appropriate stores.
 - Note: we do NOT need access to any specific subscreen, just the applications.
 - Save the changes to the User ID (and create backup User ID):
 - Press "F12" to save settings for that specific store before giving access to another store (if appropriate).
 - If giving access to multiple stores, please click on the link near the bottom right of the screen to change to the next store (the link may say something like "Store 01 / Branch 01"). Change to the next appropriate store, then repeat the steps above.
 - Press the "Esc" (escape) key to go back to previous screen.
 - Create a backup User ID by selecting **File > Add/Clone** (a shortcut is "Control+A"). The "Create a User ID" tab should appear. Click the button "Add a new User ID", but this time, choose "Add a New User ID by Copying from an Existing User ID". Follow on-screen prompts.
 - Close the SEC application, if finished. Hint: If you need to modify other User IDs (not just for 1on1), a shortcut is to type "Control + S" (this gives you the option to do a quick search by a portion of the user's name, followed by pressing the "F5" key to search).

For more details on RMI and Dynamic Reporting, please go to www.my.reyrey.com, and search for the following documents: (1) Define Security Settings for RMI Dynamic Reporting (ZB247); (2) RMI Dynamic Reporting Quick Reference Guide (ZB246).

Hardware Requirements

Before you install the "1DMS" program on your "data" PC, please review the following requirements:

- The 1DMS software will be installed on a single PC at your dealership, even if you have many stores.
- Our User ID must not be shared with any other vendor or employee.
- The "data" PC must have Windows 10, 8, 7, or Vista (not XP).
- The "data" PC should have at least 8GB of memory, and at least 10GB disk space.
- The "data" PC must have Internet access and a browser. Please limit the number of other installed programs (while unlikely, it is possible for some anti-virus software to interfere with our software). It's OK to be behind a firewall, and no need to open any special firewall port.
- The "data" PC must have Era software installed.
- The "data" PC must have Power settings turned OFF (no hibernation, no sleep). To avoid screen burn-in, you may turn off the screen, just never turn off the PC (it needs to run 24/7). You can lock the vendor PC (Windows logout), since 1DMS runs in the background.
- The "data" PC should not be frequently used by employees (other vendors is okay).