

1on1 Sales Manager Tool

User Guide

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Overview of Conversion to Dynamic Reporting ver DR4

As of May 2015, R+R expanded the number of fields per report that could be downloaded. This means that we now only need to download 1 F&I data file, rather than 3 data files (which saves time). In a nutshell, to take advantage of this capability, we need to do the following:

- (1) Install the most recent version of 1on1 before doing anything else.
- (2) Update the spec file by clicking on "Activate (update specs and expiration date)".
- (3) Open Dynamic Reporting and click F9 to import from Query Builder the files labeled "1on1_DR4_...etc" (note: DR4 refers to the 4th iteration of Dynamic Reporting that allows us to download more fields than before).
- (4) Share the new report with the appropriate users (click "Additional Users" tab).
- (5) Delete the old "1on1dr_fi ..." reports to eliminate confusion (note: do **not** delete anything that starts with "1on1dr_acc..." those are for accounting and are not affected by the recent enhancements).

Install or Upgrade 1on1

Contact your ERA System Administrator or your IT department before installing any software on your computer.

Step-by-step instructions:

- **Install 1on1 for the First Time:**
http://1on1co.com/custom_reports/files/misc/1on1sls_install1_first_time.pdf
(typically takes about **2 minutes** per computer):
- **Install 1on1 Enhancements:**
http://1on1co.com/custom_reports/files/misc/1on1sls_install2_enhancements.pdf
(typically takes about **60 seconds** per computer):
- **Activate (Update the Specs and Expiration Date):**
http://1on1co.com/custom_reports/files/misc/1on1sls_install3_activate.pdf
(typically takes about **30 seconds** per computer):

Note1: After you install the Enhancements, the 1on1 Sales Mgr Tool should display ver.2015.05.19 or higher to work with the version of Dynamic Reporting that only requires 1 F&I download (rather than 3 downloads).

Note2: After you install the Enhancements, please click the 3rd option above, called "Activate (update specs and expiration date)". In the past, you have only needed to do this for new installations. You now need to click this button AFTER running EITHER of the first 2 options above. This installs the necessary specs to work properly with the version of Dynamic Reporting that only requires 1 F&I download (rather than 3 downloads).

Setting up Security for Dynamic Reporting

- Contact your ERA System Administrator. That person must log in to the ERA Ignite “SEC” Security Application (*note: this is different than ERA screen 6210 User Security*), and do the following for the appropriate employees who are using the 1on1 Sales Mgr Tool, 1on1 State Sales Tax Tool, 1on1 Expense Analysis Tool, or the 1on1 Executive DOC:
- Define Permissions for the Dynamic Reporting Feature:
 - Log into Ignite as ADMIN.
 - Select **Applications > Security Maintenance**.
 - Search for the appropriate employee (“F5” searches; “F12” selects).
 - If you have multiple stores, make sure the correct store is selected.
 - Select **Subscreens > Security Access**.
 - If no access, then press “F5” and select Retail Management Intelligence (RMI) Application.
 - Select the **Access** checkbox for RMI, then press “F12”.
 - Click the “+” (expand) button for RMI, then choose Dynamic Reporting.
 - Click the “+” (expand) button for Dynamic Reporting, then choose options.
 - Select the **Permission** check box for each action that specific employee should have. At a minimum, any employee using 1on1 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.
 - Press “F12” to save settings for that specific employee.
 - Press the “Esc” (escape) key to go back to previous screen.
- Grant Access to Dynamic Reporting Data Sets:
 - Select **Applications > Security Maintenance**.
 - Search for the appropriate employee (“F5” searches; “F12” selects).
 - If you have multiple stores, make sure the correct store is selected.
 - Select **Subscreens > Dynamic Reporting Data Set Security**.
 - In the Run area, select the “**FANDI**” application (if you do not see your application, then press the “F2” key). After selecting the application, the available Data Sets will automatically display for you to review. Most users of the 1on1 Sales Mgr Tool will need the following files (click the appropriate **Access** checkbox):
 - **FiMast, NVInventory, UVInventory**
 - If the user has permission to run reports like: Heat Sheet, Executive DOC, Floorplan Rec, then they will also need access to the “**ACCTG**” application (if you do not see your application, then press the “F2” key). Specifically, they will need the following files (click the appropriate **Access** checkbox):
 - **Journal, NVJournal, UVSJournal, Schedule4** (Heat Sheet), **GL** (Exec DOC)
Note: you can also choose Access to All Data Sets in the Store/Branch, but that option is normally reserved for upper management).
 - Repeat previous steps to grant access for different applications.
 - Press “F12” to save settings for that specific employee.
 - Press the “Esc” (escape) key to go back to previous screen.
 - To search for the next User ID, type “Control + S”. Enter a portion of the user’s name, then press the “F5” key to search.
- For details on RMI and Dynamic Reporting, please go to www.my.reyrey.com. As a convenience, we have placed some of the key documents within the green “Instructions” button at the bottom of the 1on1 Reporting Tool. After clicking the green “Instructions” button, choose the buttons called:
 - Define Security Settings for RMI Dynamic Reporting (ZB247).
 - RMI Dynamic Reporting Quick Reference Guide (ZB246).

Converting (Importing) Queries into Dynamic Reporting

- Open 1on1; click Login; click Specs; type “DR4” for Dynamic Reporting in the yellow box; exit 1on1.
- Log into Era Ignite.
- Click on the white spreadsheet icon (6th icon from the right, at the top of Era Ignite). Or click the link for Retail Management Intelligence (RMI).
- If prompted to choose between Dynamic Reporting and Report Generator, pick Dynamic Reporting.

Do the following for each report to import:

- Click the “F8 Import” or “F9 Add New” button (at bottom of the “Search Dynamic Reporting” screen).
- Click “Import from Query Builder”, then click the button to the far right of “Import From”.
- Click the pull-down to the right of “Look In” and browse to the following folder:
My Computer, then “C:\Program Files (x86) \ 1on1 \ 1on1fi \ Dyn_Rptg” --- or ---
My Computer, then “C:\Users \ Public \ Public Documents \ 1on1 \ Sales \ Dyn_Rptg”
- Select the file called “1on1_dr4_fi1a (daily)”, then click “Add (F12)”.
- If prompted to choose between data sets, pick “FANDI” for F&I reports. You should see a “processing” message on the screen.
- Click the yellow highlighted pull-down and select the appropriate “Store/Branch”.
- Click the “F12 Add” button to add the report (the “F12 Add” changes to “F12 Update” when saved).
- Press the “Esc” (escape) key to return to the previous screen.
- Repeat the same procedure for all queries that you want to import. At minimum, you will need the 2 queries called “1on1_dr4_fi1a (daily) ...”, “1on1_dr4_fi2a (yearly) ...”.

Notes:

- *Note1: If you download your data to a server, then you will need to change the file path.*
- *Note2: If you download from multiple dealerships, then select the appropriate “Stores/Branches”.*
- *Note3: If you want to **schedule** the reports, click “F7” while editing the report.*
- *Note4: If you want **other users** to be able to download data, you should click “Additional Users”.*

Shortcuts to Launch Dynamic Reporting

- Log into Era Ignite.
- Click on the “Configure” button (at the bottom of the “Favorites” section).
- Click the pull-down under “Application” and select “Retail Management Intelligence” (RMI).
- Select the appropriate Store & Branch (ex: Store01 F&I).
- Type “R” in “Hot Key” field, then click the “Run on Startup” box. This will allow you to see RMI as a quick link within your “Favorites” section. Also, the Hot Key will allow you to quickly get to RMI and Dynamic Reporting by simply typing “Control + R” rather than clicking multiple options.
- Click or press “F12” button to Save your settings.

Downloading Data using Dynamic Reporting

Option #1: Run Now

Log into Era Ignite (not the original Era blue screen).

- Click on the white spreadsheet icon (6th icon from the right, at the top of Era Ignite). Or click the link for Retail Management Intelligence (RMI).
- Select Dynamic Reporting (optional: only needed if it does not appear automatically).
- Select the tab called “Available Reports”.
- We need to download the F&I files, as follows:
 - 1) Double-click “1on1_dr4_fi1a (daily)” then wait for about 30 seconds for report to run.
 - a) **Right-click** anywhere within the column headers, select “**Export**”, then “All Rows to File”.
 - b) Enter 4 digit security key, then wait for the green bar at the bottom of the screen to finish.
 - c) Press the “ESC” (escape) key to go back to previous screen.
 - 2) Optional: Double-click “1on1_dr4_fi1b (daily)” then wait for about 30 seconds for report to run.
 - a) **Right-click** anywhere within the column headers, select “**Export**”, then “All Rows to File”.
 - b) Enter 4 digit security key, then wait for the green bar at the bottom of the screen to finish.
 - c) Press the “ESC” (escape) key to go back to previous screen.
- Open 1on1 and choose your report.

Notes:

- *Note1: If you have more than 1 branch (ex: multiple F&I areas), and you **always** download data for multiple branches, and if your output displays “Store/Branch” (ex: “01/01”) as the left-most column, then you should open 1on1, click on the “Specs” tab, then check the box next to “F+I” that refers to data containing the “Store/Branch” field. Close and Reopen 1on1 to use the new specs.*
 - *Note2: If you have more than 1 branch (ex: multiple F&I areas), and you **sometimes** download data for multiple branches, and if your output displays “Store/Branch” (ex: “01/01”) as the left-most column, then you should create one set of reports for multiple stores, and another set of reports for the individual store. Run the report for multiple stores. After the output is displayed on your screen, please right-click anywhere in the column header, select “Columns”, then UnSelect “Branch”. Do this for each file containing the field “Branch” in the output displayed on screen (ex: 1on1_dr4_fi1a (daily), 1b, 1c and 1on1_dr4_fi2a (yearly), 2b, 2c). Remember to press “F12” to update changes. The system will remember to ignore this field from now on. Do NOT check the “F+I” box in the “Specs” tab.*
-

Option #2: Schedule

Scheduling reports through ERA Ignite is NOT as efficient as it should be. If you schedule your report to run, you still must manually open Era Ignite and download the data (see below).

To schedule a report:

- While editing a report (see above), click the “F7 Schedule” button.
- Choose the appropriate time of day, etc, then click “F12” to save your changes.

To download a scheduled report:

- Log into Era Ignite (not the original Era blue screen).
- Click on the white spreadsheet icon (6th icon from the right, at the top of Era Ignite). Or click the link for Retail Management Intelligence (RMI).
- Select Dynamic Reporting (optional: only needed if it does not appear automatically).
- Select the tab called “Completed Reports”.
- Press “F5” to view reports (reports do not appear automatically – you must press “F5” button).
- Sort the reports so the most recent reports are at the top of the table.
- Select a report. Right-click in the column header. Select Export, then All Rows to File.
- Select next report and repeat previous step until all reports are downloaded.
- Open 1on1 and choose your report.

Using your “1on1 Sales Mgr Tool”

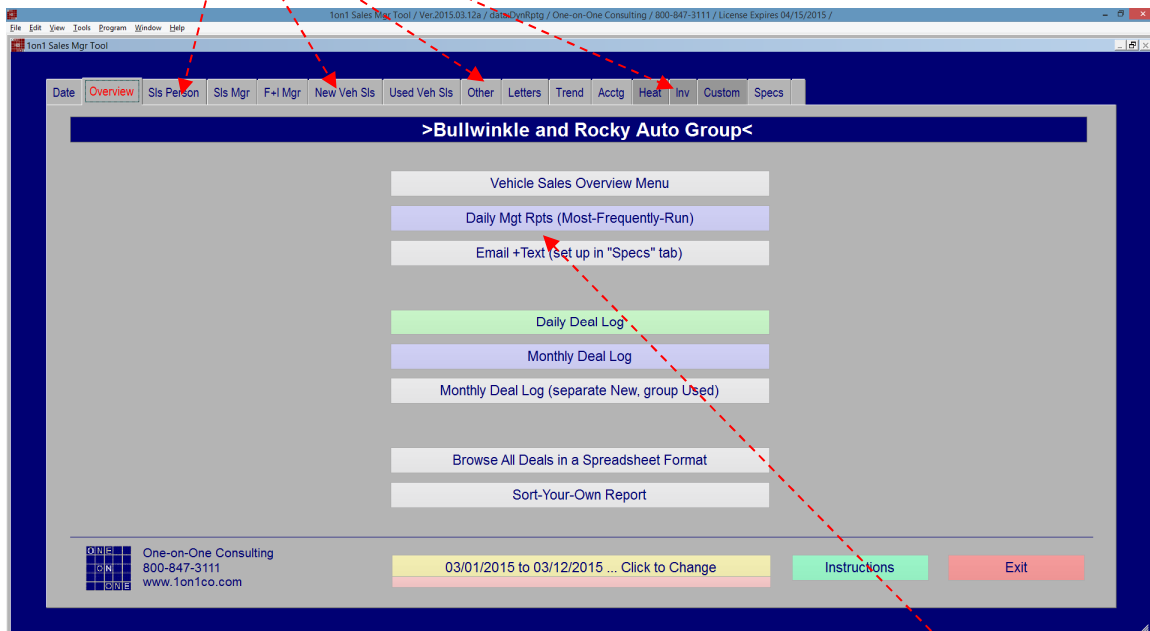
Make sure that you have downloaded data before proceeding (see previous section)

Open the “1on1 Sales Mgr Tool” icon (on your desktop)

Click “Login” to agree to the license agreement

The following screen will open.

Click on the desired group of reports (see the tabs at the top of the screen).



Since there are so many reports, many people will simply click the button, called “Daily Mgt Rpts (Most-Frequently-Run)”. This option uses our “1-click” technology to display the most-commonly-run reports with one simple click. Or explore your options by clicking the different tabs at the top of the screen. Just click the ones you want (printing is optional).

By default, the system will assume that you want the current month’s data, unless it is within the first 4 days of the month, then it is smart enough to assume that you then want the previous month’s data. At any time, you can click on the **yellow button to change date** ranges if you want. By default, the system will display data for the past 2 years, but that can easily be changed to meet your needs.

Click on the **red EXIT button** when finished.

We do our best to continually improve this tool. Please let us know if you have any suggestions.