TRMax Reporting

The instructions in this article relate to **TRMax.** The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

There are a number of reports that are available for TRMax depending on the information required. All of the reports mentioned in this article are accessed from within TRMax, except for ***Search Recoveries***, which has its own icon and menu.

Search Recoveries

Please see ***Search Recoveries*** for a very robust and simple way to display, extract, and report**TRMax** recovery data in StrataMax.
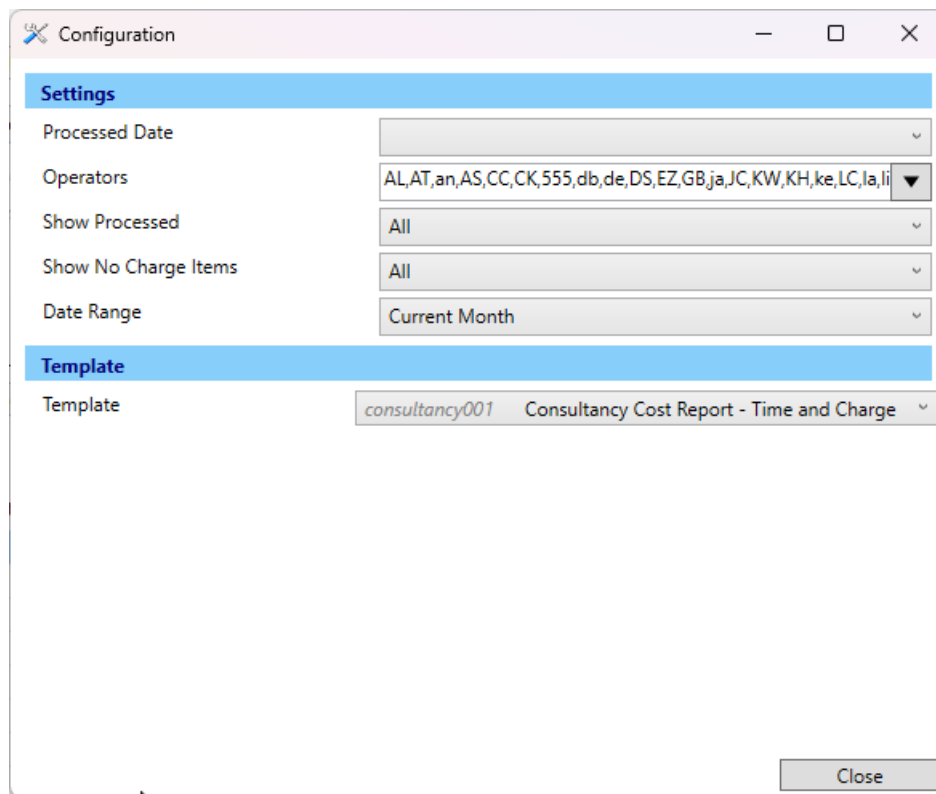
Recovery and Consultancy Reports

TRMax Recovery and Consultancy reports are now available for selection inReport Distribution. These reports can be produced as standalone reports or added to an existing report set for a single building. For global functionality, continue to use the instructions below for recovery and consultancy reports. For example, Recovery and Consultancy reports can be included in the Status Report set and will report for the period configured for the Status Report. This report should be configured in each separate window (e.g ***Merge Letters*** and ***Status Report***) to ensure the output is consistent with the expected results.

1. Search or select ***Merge Letters*** to set individually, or ***Status Report*** to include in this area.
2. Untick *Merge Letters Only*. Search for *TRMax Consultancy* and / or *TRMax Recovery*. Repeat for each report if both are required.
3. Each report must be configured using the cogwheel and the following fields set.
   - Processed Date

- Operators
- Show Processed
- Show No Charge Items
- Date Range
- Template

4. Click Close to the configuration window.
5. If being used in a report set for consistent use, click the*Save* icon to save the configuration.

Recovery Records Report

This report presents all recoveries that have been processed for a specific period.

1. Search or select **TRMax**.
2. Click *Reports.*
3. Select *Recovery Reports.*
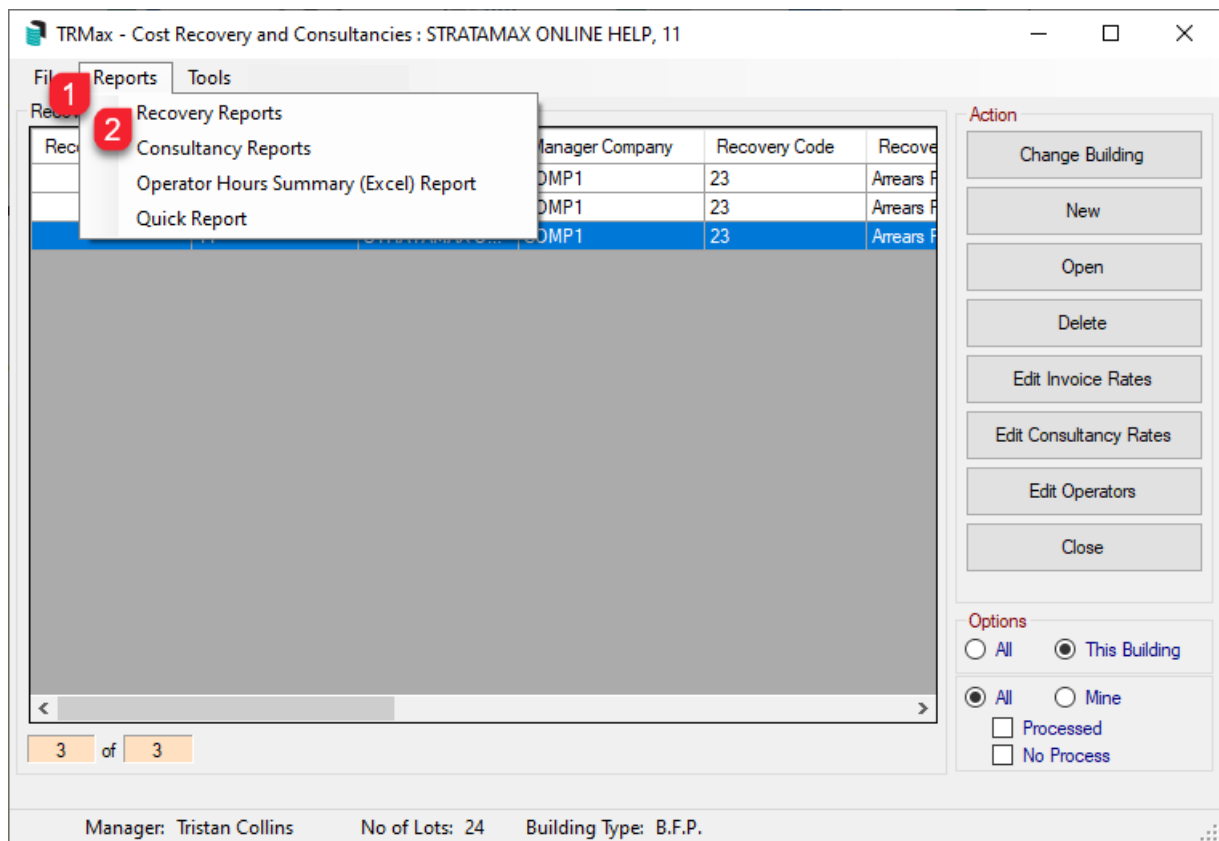
4. Click the drop arrow to view reports available and select the appropriate report.

5. Enter the required criteria.
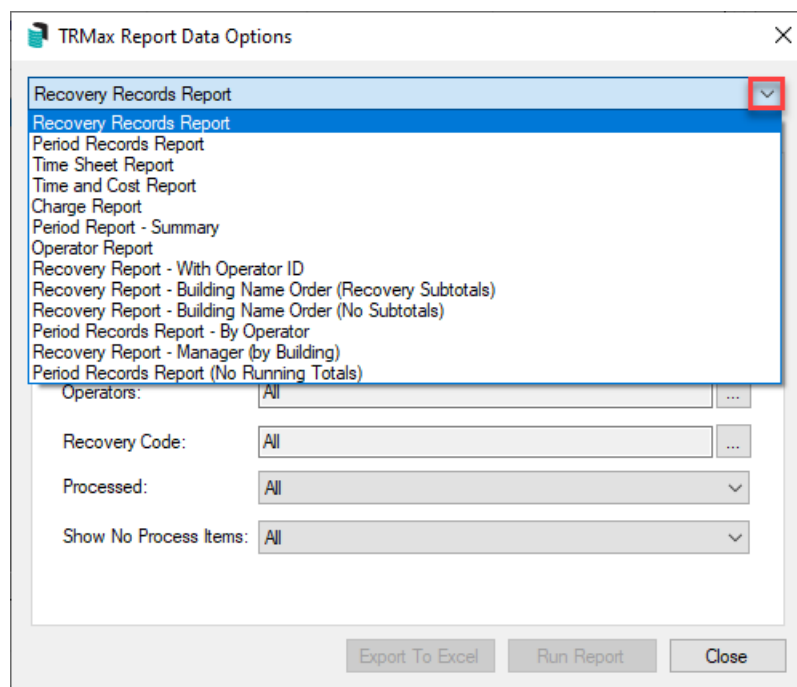
   o Options available:

a. Manager Company, select GLMax Company if there is more than one company.
b. Buildings, tag buildings for report if required.
c. Date Range, either enter a date range or select predetermined from the drop list.

d. Processed Period, select processed date if required.

e. Operators, tag if required.

f. Recovery Code, tag if required.

g. Processed, select from the drop list.

h. Show No Process Items, select from the drop list.

i. Click on the tab *Format Options* and tick selections as required.

j. There is an option to *Export To Excel.*

k. Select *Run Report* to produce report to screen.

l. Select *Close* to exit the Report Data Options.

Consultancy Reports

This report details the records for consultancy against the actual cost.

1. Search or select **TRMax**.

2. Click *Reports*.

3. Click *Consultancy Reports*.

4. Select *Consultancy Cost Report*.

5. Apply settings.

6. Click *Export to Excel* or *Run Report.*

Operator Hours Summary (Excel) Report

1. Search or select **TRMax**.

2. Click *Reports*.
3. Click *Operator Hours Summary (Excel) Report*.
4. Enter 'Start Date' and 'End Date' and click *OK*.

Quick Report

The quick report will report the information showing on your screen from 'Options', selected on the bottom right of your screen - 'All' / 'This Building' and 'All' / 'Mine', 'Processed', 'No Process'.

1. Search or select **TRMax**.
2. Select *Reports*.
3. Click *Quick Report*.

Filtering and deleting multiple TRMax records

1. Search or select **TRMax**.
2. Set *Options* accordingly - Building and User selections.
3. Right click on any column, and the option to filter will be displayed and you can then show all e.g. Email and delete multiple records.
4. Click *Tools* and then 'Select Multiple Rows'.
5. Click the rows you want highlighted by using your mouse and the shift or control keys.
6. Click *Delete*.
7. Click *Yes* to the message.