

Polaris Reporting Installation Instructions

Downloading the reports

You can download the reports from our website (Insert link here). After you have downloaded the reports, they need placing in the company folder along with the macros. Usually this will be the SXCo1 folder. If you run a multi company setup of Platinum then you will need to copy these reports to the relevant folders (SXCo2 etc).

🗋 ~PI	File	1 KB	No
🗋 ~PI.ST	ST File	2 KB	No
📄 ~PS	File	1 KB	No
~PS.ST	ST File	3 KB	No

Typically SXCo1 can be found by opening up windows file explorer (Windows key + E) and paste in the file path location P:\SX\SXCo1 into the address bar at the top. If you use a different drive mapping for Platinum then please replace the "P:\" to your drive mapping.

File	Home	Share	View					
Pin to Qu access	ick Copy	Paste	Cut Copy path Paste shortcut	Move to *	Copy to -	X Delete	■】 Rename	New folder
	C	ipboard			Orga	anise		
\leftrightarrow \rightarrow \checkmark \uparrow This PC \rightarrow Public (\\CYMSL-STEWAPER1) (P:) \rightarrow SX \rightarrow SXCo1								

Importing the reports

Once the reports have been copied to the SXCo1 folder then you are now ready to import them into Platinum. Sign into Platinum and head to *Systems* > *Stock Control* > *Stock Reports* > *Stock Reports Generator*. Click on the functions button which is highlighted below.

🚼 Add or Edit Reports



Select "Import Report"



🚼 Functions	Available ?	×		
<f2></f2>	Proceed with Search			
<s-f2></s-f2>	Start Specific Report			
<f3></f3>	List Code Variations			
<f6></f6>	Add Report			
<f7></f7>	File Browser			
<s-f8></s-f8>	Import Report			
<f9> Advanced Search Range</f9>				
	Custom Cance	el		

Once that has been selected click on the "..."

🚼 Repor	t Transfer		×
👈 Exit	C Proceed	🕜 k? 🚺	
Import	report File name:	REPORT.ST	
		OK Can	cel



This will open up Windows File Explorer, you should see your copied reports of ~PI.ST and ~PS.ST.

🚼 File Search				×
Look in:	SXCo1	~	G 🤌 📂 🛄 -	
₹	Name	^	Date modified	Туре
	Browser		31/07/2023 10:14	File fo
Quick access	Docs		10/03/2023 11:08	File fo
	Export		03/03/2016 12:12	File fo
	HEADERCO1		10/03/2023 11:08	File fo
Desktop	Logs		31/07/2023 15:19	File fo
	Pics		10/03/2023 11:08	File fo
-	Purge		31/07/2023 15:19	File fo
Libraries	SXHelp		03/03/2016 12:12	File fo
	📑 ~PI.ST		31/07/2023 14:49	ST Fil
	PS.ST		31/07/2023 14:49	ST Fil
This PC				
	<			>
	File name:	REPORT	~	OK
Network	The fidine.		-	ON
	Files of type:	Import/Export Files	~	Cancel
	Action:	Choose the selected file	\sim	Help

Simply double click on PI.ST and repeat the above process for PS.ST.

Configuring the reports

Once the reports have been imported you will need to amend them to match your company details with Polaris. This process will need completing for both reports of "~PI" and "~PS".



Find the reports in the Stock Report Generator. Highlight the report and click on edit.



Click on Range Filter (1) and "POL001" account code is already filled in. If this is not your Purchase Ledger account for Polaris, then please either change this to the account code you hold for them or create it. Once you have amended the screen press "ESC" on your keyboard to exit the Range Filter (1) screen.

After you have completed that, head to the "Definable Literals" button.

There are 3 fields that you need to update.

"ACCNUM" needs to be overwritten with your Polaris account number.

"DEACDE" needs to be overwritten with your Polaris dealer code

"GB" needs to be overwritten with your country code. In most instances this won't need touching.



🚼 Sto	ck Control	?	×
Polar	is PGA Inventory		
1	Sort Order		
2	File Selection		
3	Date Ranges		
4	Range Filter (1)		
5	Range Filter (2)		
6	Range Filter (3)		
7	Column Details		
8	Output Options		
9	Definable Literals		
10	Test Run the Report		
ESC	Finish Editing		
Select	option:		

After you have completed the definable literals, press "ESC" and "Finish Editing". Press "Accept" to save your changes made. This process will also need to be repeated for the second report.

Importing the macro

Within the download you should also receive two macros called ~PI and ~PS. Login to Platinum and head over to macros at the very top of the screen and then click no "Macro Manager"

	-Cataly	yst Denio (.	si) on criv	ISL-STEW	APENI - Pidu	inum w	lodules - Catalyst Platinum	
Task	Edit	Options	Macros	Reports	Messages	Help		
Press	the f	unctions	button (I	F12) or	the blue m	ouse a	arrow/question mark.	
🚼 A	dd, Edi	it or Play M	acros				-	
5 ₽	xit (Procee	d 🕜 丨	*? 🕞	-			



Select "Import" and then click on the three dots to open Windows file explorer. From here find where you have saved the macros to and select ~PI. Repeat the process and click on ~PS this time.

Setting up the Windows Task Scheduler

This process will need to be completed on a PC that has a Platinum terminal licence and will be switched on at the time specified on the scheduled task.

Open the task scheduler service by pressing on the windows key on your keyboard, afterwards type "Task Scheduler" and click on the icon.

Right click on "Task Scheduler Library" and select "New folder..." and name it Catalyst.

P Task Scheduler (Local)							
🗸 🔀 Task Scheduler Library							
Agent Activation Runtime							
📫 Apple							
AVAST Software							
> 🧮 Hewlett-Packard							
> 🛗 HP							
Enter name of the new folder ×							
Name							
Catalyst							
OK Cancel							

Click onto that newly created folder and on the right-hand side select "Create Task". You will need to create two scheduled tasks, one for each report.

Call the first task "PGA Inventory Upload" Call the second task "PGA Sale Upload"



Courts Tests	V	Cat	talyst
Create lask	^	1	Create Basic Task
ieneral Trig	gers Actions Conditions Settings	•	Create Task
Name:			Import Task
ocation:	\Catalyst		Disable All Tasks History
)escription:		×	New Folder Delete Folder
			View
C		Q	Refresh
When runn	ing the task, use the following user account:	?	Help
Run only	y when user is logged on		
O Run whe	ether user is logged on or not not store password. The task will only have access to local computer resources.		
Run with	n highest privileges		
Hidden	Configure for: Windows Vista™, Windows Server™ 2008 ∨		
	OK Cancel		



Click on "Triggers" at the very top and then click on "New" to set a new trigger point for this to activate. Select "Daily" on the settings and a time of 18:00. Then click "Ok" once you have input those options.
New Trigger
X

Begin the task: On a schedule Settings One time ● Daily ● Weekly ● Monthly Recur every: 1 days
Advanced settings Delay task for up to (random delay): 1 hour v Repeat task every: 1 hour v for a duration of: 1 day v Stop all running tasks at end of repetition duration Stop task if it runs longer than: 3 days v Expire: 07/08/2024 v 14:21:41 v Synchronize across time zones Enabled
OK Cancel

Click on "Actions" at the very top and then click "New" to implement a new action.

Under Program/Script paste *P:\SX\SXutils\CR32.exe* and in the arguments paste in *SXCO=1 SXVER=4.01 K:SX GR00 ~PI*



New Actio	n	>
You mus	t specify what action this task will perform.	
Action:	Start a program	~
Settings	;	
<u>P</u> rogra	m/script:	
P:\SX\	SXutils\CR32.exe	B <u>r</u> owse
<u>A</u> dd ar	guments (optional):	VER=4.01 K:SX GR00 ~PI
S <u>t</u> art in	n (optional):	

Now create a secondary task called "PGA Sale Upload" with the same trigger point.

The program/script remains the same of *P:\SX\SXutils\CR32.exe* and the argument is *SXCO=1 SXVER=4.01 K:SX GR00 ~PS*