Adhoc Reporting

Contents

Overview

The **Adhoc Reporting** module within Access Commander® is an Ad Hoc SSRS (SQL Server Reporting Services) Web Reporting System. It allows you to produce formatted reports with tables in the form of data, graph, images and charts.

The **Adhoc Reporting** module is accessed from the Access Commander **User Home Page** menu.

To create a new report, users:

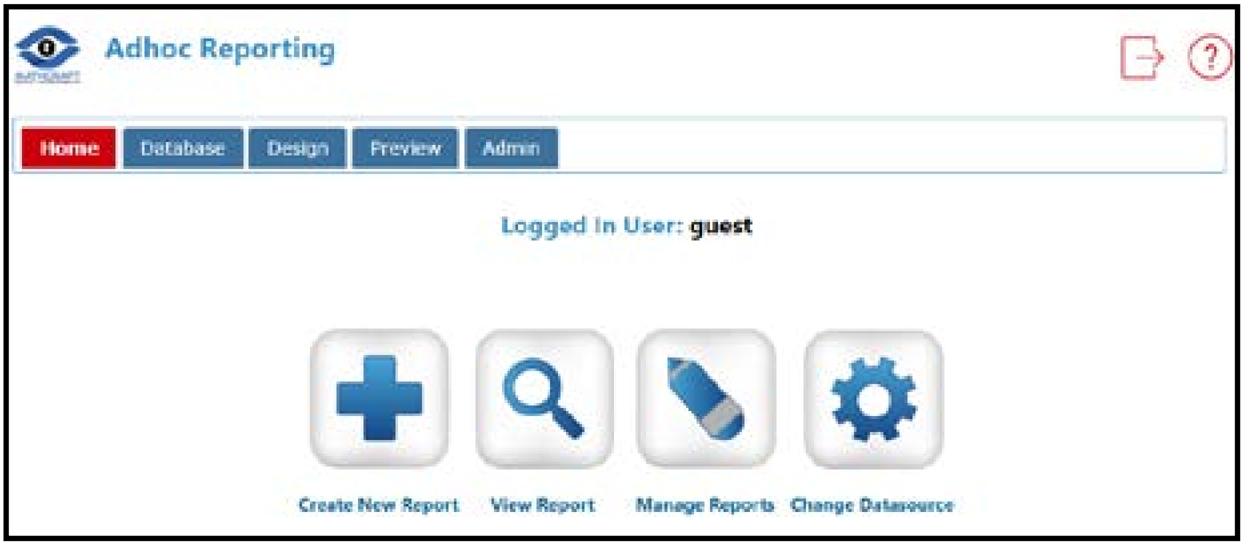
1. Select the Access Commander fields to include in the report, and designate the field sorting and filters.
2. Add to and modify the design of the report, such as adding charts, highlighting fields, inserting groups, and the report name.
3. Preview the report
4. Print and/or export the report

The design elements that can be applied to customize a report include:

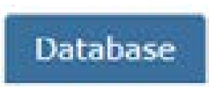
- Company logos
- Font type and color
- Grouping by field
- Group summaries and grand totals to the report footer
- Running Totals
- Charts, including Column, Pie, Funnel, Bar, Area and Line Charts
- Data bars
- Indicators
- Field Highlighting
- Paper size and page margins

Adhoc Reporting Home Page

The **Home Page** displays after logging in.



The following table describes the tabs and buttons on the Home Page.

 **Home** tab Takes you back to the Home Page. The Home Page displays: • 4 Buttons: • 5 Tabs: • Create New Report button/Database tab • View Report button/Preview tab • Manage Reports button/Admin tab • Change Datasource button/Admin tab **Database** tab
 Opens the Database page on which you designate and modify the: • Tables and Fields • Report fields • Field Sorting • Query Filters

Design tab

Opens the Design page on which you can access the following report design options:

- Report Info
- Report Fields
- Insert Groups
- Insert Summaries
- Insert Running Totals
- Insert Charts
- Insert Databars
- Insert Indicators
- Field Highlightings
- Page Setup

Preview tab

Opens the Preview page on which you can do the following:

- View the report
- Download a report
- Create a new report
- Rename a report
- Delete a report
- Upload a report
- Save (move) a report to a different folder

After you have selected a report and clicked **View Report**, the following options are available for the report:

- Refresh
- Export
- Print

Admin tab

Opens the Manage Reports page on which you can do following:

- Create a new folder
- Upload a report
- Rename a report or folder
- Delete a report or folder

Create New Report button (displays only when you're on the Home Page)

Opens the Database page (the same as the **Database** button) on which you designate and modify the:

- Tables and Fields
- Report fields
- Field Sorting
- Query Filters

View Report button (displays only when you're on the Home Page)

Opens the Preview page (the same as the **Preview** button) on which you can do the following:

- View the report
- Download a report
- Create a new report
- Rename a report
- Delete a report
- Upload a report

After you have selected a report and clicked **View Report**, the following options are available for the report:

- Refresh
- Export
- Print

Manage Reports button (displays only when you're on the Home Page)

Opens the Manage Reports page (the same as the **Admin** button) on which you can do the following:

- Create a new folder
- Upload a report
- Rename a report
- Delete a report or report folder

Users with System Admin access can also:

- Change a new user's password
- Change the report datasource?
- Create new users
- Manage user accounts (what does this include?)

Back to this chapter's TOC

	**Change Datasource** button (displays only when you're on the Home Page) Opens the Change Report Datasource page on which you set your database as the default database the first time you use Adhoc Reporting.

Database Tab How To's

In This Section

✓ Create a New Report

Create a New Report

Database tab

Also accessible via:

User Home Page > **Create New Report** button

Preview tab > **Create New Report** button

✓

There is a 30 minute session time out! If you let the system be idle for half an hour, it will automatically log out. To save your selected fields, click the Preview button. Name the report to what you want and that will save your design and you can finish it another time.

If you click **Home** and then **Create New Report** while you are working on the Database tab, the old design information will not be saved.

To design and run a custom report:

1. On the Ad Hoc Reporting Home page, click the **Create New Report** button.
   The Tables and Fields, Report Fields, Field Sorting and Query Filters sections display.
2. In the **Tables and Fields** section, expand the table that contains the fields for the report you're creating. If you're not sure which Table is correct, browse through the tables.
   The fields included in the table display.
3. Click the check box for the fields you want to include in the report. To select/unselect all the fields at once, click the check box to the left of the table title.

✓

If you choose too many fields from too many tables, performance can be slow because the generated SQL takes time to run. It is recommended that you choose only the fields that are necessary for the report you are creating.

4. To include fields from another table, repeat steps 2 and 3 above.
5. Add the selected fields to the report: Click the **Add Fields** button or the **Add Report Fields** button (it's to the left of the **Report Fields** title).
   The fields display in the **Report Fields** section, with the **Expression**, **Title** and **Sorting** columns.

✓ The **Clear All** button removes all of the fields from the report **and** any design information.

6. Sort the fields, as applicable: In the **Sorting** column, click **Not sorted** for the field for which you want to sort the report data.

✓ The order in which you select the fields determines their position (sort order) in the report. You can change the order of the sort fields later if you want.

   The sort options display: **Not sorted**, **Ascending** and **Descending**.

7. Select **Ascending** or **Descending**, as applicable.

   The selected field displays in the **Field Sorting** section.

8. Add additional fields for sorting, if applicable.
9. Make adjustments to the sort order, if needed. Click on the blue arrow button to the left of the sort field to change it's sort order:
   - **Ascending**
   - **Descending**
   - **Move to top**
   - **Move up**
   - **Move down**
   - **Move to bottom**
   - **Delete sorting**
10. Add filter fields, as applicable: In the **Query Filters** section, click the **Add Report Filters** button (it's to the left of the **Query Filters** title).

    The fields included in the report display in the **Query Filters** section.

11. Uncheck the fields that you do not want to set up as filters.
12. For the field(s) you selected to be a filter, click **starts with** (applies to non-date fields) or **is before** (applies to date field) and select the criteria that applies to the field:
    - **starts with** - the choices are starts with, contains, is equal to, is in list, does not start with, does not contain, is not equal to, is not in list, in sub query, is null, is not null
    - **is before** - the choices are is before (special date), is before (precise date), is after (special date), is after (precise date), is between, is (special date), is (precise date), is not (special date), is not (precise date), is maximum of, is null, is not null
13. For each field, click **[enter value]** or **[select value]** and select/enter the value that applies to the field:
    - **[enter value]** - type in the value
    - **[select value]** - the choices are Today, Yesterday, Tomorrow, First day of the month, First day of the year is the criteria chosen was for a special date. If the criteria chosen is for a precise date, the current date prepopulates; change the date to the desired date, if applicable.
14. The choices for filter fields are:
    - **All**
    - **Any**
    - **Not all**
    - **None**
15. Click the **Design** tab and complete the fields:
    - **Report Name** - Enter the name that should display on the report.

- **Report Author** - Enter your name.
- **Report Title** - Enter the name that will display on the report. By default the title displays left-aligned at the top of the report.
- **Report Description** - Optional. Enter a description for the report. By default the description displays left-aligned under the Report Title.
- **Report Logo** - Enter a description for the report.
- **Report Logo URL** - Optional. To enter a website address that links to the website when the logo is clicked, paste the URL into the field.
- **Detail Row Format** - Select the format for detail rows in the report so it is easier to read. The selections are **Alternate Row Color, Underline** or **Nothing**.

16. Make any additional design changes:
    - **Report Fields**
    - **Insert Groups**
    - **Insert Summaries**
    - **Insert Running Totals**
    - **Insert Charts**
    - **Insert Databars**
    - **Insert Indicators**
    - **Field Highlightings**
    - **Page Setup**
17. Click the **Create Report** button.
    The **Preview** tab displays with your newly designed report.

Query Filters

Button or Column	Description
Date fields	is after is before (special date)* is before (precise date) is after (special date)* is after (precise date) is between is (special date)* is (precise date) is not (special date)* is not (precise date) is maximum of is null is not null * When the criteria chosen is for a special date, the following values are available for selection when you click [select value]: Today Yesterday Tomorrow First day of the month First day of the year

Button or Column	Description
Non-Date fields	starts with contains is equal to is in list does not start with does not contain is not equal to is not in list in sub query is null is not null
Sort Field(s) column	**None** button All checked fields are unchecked. None of the fields are designated as sort fields. **Position** field Determines the order in which the query results display. The order in which you select the fields determines the position number (i.e., the sort field selected first will be the first sort criterion, the one selected next will be the second sort criterion, and so forth). **Descending** check box Populates the number (e.g., 1, 2, 3) that indicates the order in which the sort will be applied, either in ascending or descending order. If checked, will be in descending order. If not, ascending.
Filter Field(s) column	**None** button All checked fields are unchecked. Check box When checked, the field is designated as a filter. The criterion for the field is entered on the **Adhoc Query** (Summary) screen.

Design Tab How To's

- ✓ Add Your Company Logo to a Report
- ✓ Change Report Field Properties
- ✓ Insert Groups
- ✓ Insert Summaries
- ✓ Insert Running Totals
- ✓ Insert a Chart
- ✓ Insert Data Bars
- ✓ Insert Indicators
- ✓ Add Field Highlighting
- ✓ Change Page Settings (size, margins & orientation)
- ✓ Change the Format of Detail Rows
- ✓ Reorder Report Fields

Add Your Company Logo to a Report

Design tab > **Report Logo** section

1. Click the **Preview** tab.
   The **Report Folder** section displays, with the available folders and reports.
2. Expand the applicable folder and click the report into which you want to insert a group(s).
   The **Report Folder** selected report name displays in the field next to the **View Report** and **Download** buttons.
3. Click the **View Report** button.
   The report displays.
4. Click the **Design** tab.
   The **Report Info** fields and design menus display.
5. In the **Report Logo** section, select the logo. The logo will display at the top of the report.
6. Enter a website URL In the **Report Logo URL** field if you want report viewers to be able to click on the logo and be taken to the website.
7. Click the **Create Report** button or **Preview** tab to apply the design change, and see the results of the added summary.

Change Report Field Properties

Design tab > **Report Fields** menu > **Display Name**, **Font**, **Font Color**, **Font Bold or Regular**, **Back Color**, **Show/Hide**, and **Column Width** options

The columns are Display Name, Font Name, Width, Bold, Font Color, Back Color and Show. You can also reorder fields by dragging and dropping a row into its new spot in the order.

1. Click the **Preview** tab.
   The **Report Folder** section displays, with the available folders and reports.
2. Expand the applicable folder and click the report into which you want to insert a group(s).
   The **Report Folder** selected report name displays in the field next to the **View Report** and **Download** buttons.
3. Click the **View Report** button.
   The report displays.
4. Click the **Design** tab.
   The **Report Info** fields and design menus display.
5. Click the **Report Fields** menu.
   The **Report Fields** table displays.
6. Modify field properties using the fields in the columns:
   - **Display Name** - To change the name of the field as it displays on the report, type in the desired name.
   - **Font Name** - To change the font in which the field name displays, click the down arrow and select the desired font.
   - **Width** - To change the width of a column, highlight the width that is displaying and enter the desired width.
   - **Bold** - To display a field name in bold on the report, check its Bold check box.
   - **Font Color** - To change the font color of a field's name, click the down arrow in the Font Color column and select the desired font color.
   - **Back Color** - To add/change the back color of a field's name, click the down arrow in the Back Color column and select the desired back color.
   - **Show** - To show or hide a field title, check or uncheck its check box in the Show column, accordingly.
7. Click the **Create Report** button or **Preview** tab to apply the design change, and see the results of your field property changes.

Insert Groups

Design tab > **Insert Groups** menu

Grouping allows you to separate groups of records visually and to display introductory and summary data for each group

1. Click the **Preview** tab.
   The **Report Folder** section displays, with the available folders and reports.
2. Expand the applicable folder and click the report into which you want to insert a group(s).

The **Report Folder** selected report name displays in the field next to the **View Report** and **Download** buttons.

3. Click the **View Report** button.

   The report displays.

4. Click the **Design** tab.

   The **Report Info** and design menus display.

5. Click the **Insert Groups** menu.

   The **Insert Report Groups** fields display.

6. In order of the most outer group to the most inner group, double-click a field in the **Available fields:** list box. You can also click the field and then the **Add Report Group** button.

✓ You can't reorder the fields in the group after you've moved them to the Group by list. To modify the order, remove them and add them back to the group in the correct order.

7. Click the **Create Report** button or **Preview** tab to apply the design change, and see the results of your grouping.

Insert Summaries

Design tab > **Insert Summaries** menu > **Count Distinct**, **Count**, **Maximum** and **Minimum Width** options

This feature is used to sum a numerical field. The summary location can be at the report level as a grand total or at the group level. You can also insert a percentage summary to a group.

1. Click the **Preview** tab.

   The **Report Folder** section displays, with the available folders and reports.

2. Expand the applicable folder and click the report into which you want to insert a group(s).

   The **Report Folder** selected report name displays in the field next to the **View Report** and **Download** buttons.

3. Click the **View Report** button.

   The report displays.

4. Click the **Design** tab.

   The **Report Info** fields and design menus display.

5. Click the **Insert Summaries** menu.

   The **Insert Summaries** table displays.

6. In the **Choose the Field to Summary** column, click the down arrow to display the fields in the report and select the field to sum.

7. In the **Summary Type** column, click the down arrow to display the summary types:
   - **CountDistinct** - evaluates and counts the number of distinct values for the specified field (e.g., you can see not only the total number of products sold, but also the number of unique products sold).
   - **Count** - provides the count of non-null values for the specified field.
   - **Maximum** - provides the maximum value of all non-null values for the specified field.
   - **Minimum** - provides the minimum value of all non-null values for the specified field.

8. In the **Summary Location** column, click the down arrow to display the report location for the sum. Depending on the field that being summed, there may only be one option.

- **Grand Total (Report Footer)** - When selected displays the grand total at the report level.
- **Groups** - If a group was selected in the **Choose the Field to Summary** field, additional options in the **Summary Location** column will be the groups that have been set up for the report.

9. If a group was chosen in the **Choose the Field to Summary** column, the option to **Show As Percentage of** check box is active. Check the check box and select the applicable option for the drop down menu.
10. Click the **Insert Summary** button.
    The summary displays.
11. Click the **Create Report** button or **Preview** tab to apply the design change, and see the results of the added summary.

Insert Running Totals

Design tab > **Insert Running Totals** menu

Running totals are totals that are displayed on a record by record basis. They sum all records (in the report, in the group, and so on) up to and including the current record.

1. Click the **Preview** tab.
   The **Report Folder** section displays, with the available folders and reports.
2. Expand the applicable folder and click the report into which you want to insert a group(s).
   The **Report Folder** selected report name displays in the field next to the **View Report** and **Download** buttons.
3. Click the **View Report** button.
   The report displays.
4. Click the **Design** tab.
   The **Report Info** fields and design menus display.
5. Click the **Insert Running Totals** menu.
   The **Insert Running Totals** table displays.
6. In the **Choose the Field** column, click the down arrow to display the fields in the report and select the field for which you want a running total on the report.
7. In the **Summary Type** column, click the down arrow to display the summary types:
   - **CountDistinct** - evaluates and counts the number of distinct values for the specified field (e.g., you can see not only the total number of products sold, but also the number of unique products sold).
   - **Count** - provides the count of non-null values for the specified field.
   - **Maximum** - provides the maximum value of all non-null values for the specified field.
   - **Minimum** - provides the minimum value of all non-null values for the specified field.
8. In the **Reset Scope** column, click the down arrow to display the reset scope options for the running total. Depending on the field that is selected, there may only be one option.
   - **DataSet1** - When selected the running total will not be rest at all.
   - **Groups** - Select a group name to reset the running total when a new group starts.
9. Click the **Insert Running Total** button.
   The running total with the displays with the values you selected.

10. Click the **Create Report** button or **Preview** tab to apply the design change, and see the results of your running total.

Insert a Chart

Design tab > **Insert Charts** menu

The chart types that you can add to a report include: **Column Chart**, **Shape (Pie, Funnel)**, **Bar Chart**, **Area Chart** and **Line Chart**. Chart title and axis titles are all automatically generated, and can be changed to whatever you like.

1. Click the **Preview** tab.
   The **Report Folder** section displays, with the available folders and reports.
2. Expand the applicable folder and click the report into which you want to insert a group(s).
   The **Report Folder** selected report name displays in the field next to the **View Report** and **Download** buttons.
3. Click the **View Report** button.
   The report displays.
4. Click the **Design** tab.
   The **Report Info** fields and design menus display.
5. Click the **Insert Charts** menu.
   The chart options display: Column Chart, Shape (Pie, Funnel), Bar Chart, Area Chart, Line Chart.
6. Select the chart you want to create.
   The design fields for the chart display.
7. Click the display option for the chart.
8. In the **Arrange Chart Data** section, enter:
   - **Chart Title** - evaluates and counts the number of distinct values for the specified field (e.g., you can see not only the total number of products sold, but also the number of unique products sold).
   - **Chart Width** - provides the count of non-null values for the specified field.
   - **Chart Height** - provides the maximum value of all non-null values for the specified field.
9. From the **Available fields** list, select one field for the **Category** and click the blue arrow.
   The field displays in the **Categories** field.
10. From the **Available fields** list, select one field for the **Series** and click the blue arrow. This is optional for most charts.
    The field displays in the **Series** field.
11. From the **Available fields** list, select one field for the **Values** and click the blue arrow. This field will show as the data axis in the chart.
    The field displays in the **Values** field.
12. Click the **Create Report** button or **Preview** tab to apply the design change, and see the chart in the report.

Insert Data Bars

Design tab > **Insert Databars** menu

Data bars typically represent a single data point, just like regular bar charts. The data bar displays in the detailed section next to the last database field. You may add more than on data bar, but for each numerical field, only one data bar can be added.

1. Click the **Preview** tab.
   The **Report Folder** section displays, with the available folders and reports.
2. Expand the applicable folder and click the report into which you want to insert a group(s).
   The **Report Folder** selected report name displays in the field next to the **View Report** and **Download** buttons.
3. Click the **View Report** button.
   The report displays.
4. Click the **Design** tab.
   The **Report Info** fields and design menus display.
5. Click the **Insert Databars** menu.
   The **Insert Databars** table displays.
6. Select the chart you want to create.
   The design fields for the chart display.
7. Complete the fields:
   - **Short Description** - evaluates and counts the number of distinct values for the specified field (e.g., you can see not only the total number of products sold, but also the number of unique products sold).
   - **Choose the Field** - provides the count of non-null values for the specified field.
   - **Color** - click the down arrow and select the desired color.
   - **Width** - change the default wide, if needed.
   - **Height** - change the default height, if needed.
8. Click the **Insert Databar** button.
   The summary displays.
9. Click the **Create Report** button or **Preview** tab to apply the design change, and see the data bar in the report.

Insert Indicators

Design tab > **Insert Indicators** menu

Indicators are minimal gauges that convey the state of a single data value at a glance. The indicator will display in the detailed section next to the databar or in the last database field.

1. Click the **Preview** tab.
   The **Report Folder** section displays, with the available folders and reports.

2. Expand the applicable folder and click the report into which you want to insert a group(s).
   The **Report Folder** selected report name displays in the field next to the **View Report** and **Download** buttons.
3. Click the **View Report** button.
   The report displays.
4. Click the **Design** tab.
   The **Report Info** fields and design menus display.
5. Click the **Insert Indicators** menu.
   The **Insert Indicators** table displays.
6. Select the field for the indicator from the **Indicator Field** drop-down.
   The design fields for the chart display.
7. To designate a minimum and maximum value for the indicator states, click the check box for S**tates Measurement Unit** and enter the applicable values in the **Minimum Value** and **Maximum Value** fields.
8. Select an indicator set from the indicator gallery.
9. In the **Indicator States** section, complete the **Color**, **Start Value** and **End Value** for each indicator symbol.
10. Click the **Insert Indicator** button.
    The indicator configuration displays.
11. Click the **Create Report** button or **Preview** tab to apply the design change, and see the indicators in the report.

Add Field Highlighting

Design tab > **Field Highlightings** menu

You can apply conditional highlight formatting to all types of report fields.

1. Click the **Preview** tab.
   The **Report Folder** section displays, with the available folders and reports.
2. Expand the applicable folder and click the report into which you want to insert a group(s).
   The **Report Folder** selected report name displays in the field next to the **View Report** and **Download** buttons.
3. Click the **View Report** button.
   The report displays.
4. Click the **Design** tab.
   The **Report Info** fields and design menus display.
5. Click the **Field Highlightings** menu.
   The **Report Field Highlighting** fields display.
6. Select the field to highlight from the **Highlighting Field** drop-down.
   The design fields for the chart display.
7. Select the condition field that will be used to evaluate the value to determine how to highlight the field from the **Condition Field** drop-down.
8. Select the evaluation operation (e.g., equal, greater than) from the **Operation** drop-down.

9. Enter the first value for the highlighting condition in the **Value 1** field.
10. If the **Value 2** field displays, then you are required to enter the second value as well.
11. If you want the font color to be other than the default, black, select the desired color from the **Font Color** drop-down.
12. Select the color to use as the highlighting color from the **Background** drop-down.
13. Click the **Insert Highlighting** button.
    The field highlighting configuration displays.
14. Click the **Create Report** button or **Preview** tab to apply the design change, and see the field highlighting.

Change Page Settings (size, margins & orientation)

Design tab > **Page Setup** menu

Change the paper size, page width, margins, height and orientation (Portrait or Landscape).

1. Click the **Preview** tab.
   The **Report Folder** section displays, with the available folders and reports.
2. Expand the applicable folder and click the report into which you want to insert a group(s).
   The **Report Folder** selected report name displays in the field next to the **View Report** and **Download** buttons.
3. Click the **View Report** button.
   The report displays.
4. Click the **Design** tab.
   The **Report Info** fields and design menus display.
5. Click the **Page Setup** menu.
   The **Change page size and margins for the report** sections display.
6. In the **Paper Size** section, make the needed changes to the paper size settings:
   - **Paper Size**
   - **Width**
   - **Height**
   - **Orientation**
7. In the **Page Margins** section, make the needed changes to the margins
   - **Left**
   - **Right**
   - **Top**
   - **Bottom**
8. Click the **Create Report** button or **Preview** tab to apply the design change, and see the new paper size and page margin settings.

Change the Format of Detail Rows

Design tab > **Report Info** menu > **Detail Row Format** gallery options

The options are Alternate Row Color, Underline and Nothing.

1. Click the **Preview** tab.
   The **Report Folder** section displays, with the available folders and reports.
2. Expand the applicable folder and click the report into which you want to insert a group(s).
   The **Report Folder** selected report name displays in the field next to the **View Report** and **Download** buttons.
3. Click the **View Report** button.
   The report displays.
4. Click the **Design** tab.
   The **Report Info** fields and design menus display.
5. In the **Detail Row Format** gallery, click on the desired format for detail rows. Or, click the down arrow in the drop-down field above the gallery, and select the row format:
   - **Alternate Row Color**
   - **Light Grey Underline**
   - **None**
6. Click the **Create Report** button or **Preview** tab to apply the design change and to see the new detail rows format.

Reorder Report Fields

Design tab > **Report Fields** menu > **Field Name** drag and drop

You can also reorder fields by dragging and dropping a row into its new spot in the order.

1. Click the **Preview** tab.
   The **Report Folder** section displays, with the available folders and reports.
2. Expand the applicable folder and click the report into which you want to insert a group(s).
   The **Report Folder** selected report name displays in the field next to the **View Report** and **Download** buttons.
3. Click the **View Report** button.
   The report displays.
4. Click the **Design** tab.
   The **Report Info** fields and design menus display.
5. Click the **Report Fields** menu.
   The **Report Fields** table displays.
6. In the Field Name column, click the field you want to place in a different position, hold the mouse down and drag and drop it to its new position.
7. Click the **Create Report** button or **Preview** tab to apply the design change, and see the results of your field

property changes.

Preview Tab How To's

- ✓ Run,View and Refresh an Existing Report
- ✓ Revise an Existing Report
- ✓ Print a Report
- ✓ Export a Report
- ✓ Delete a Report
- ✓ Rename a Report
- ✓ Save (Move) a Report to a Different Folder
- ✓ Create a New Report

Run, View and Refresh an Existing Report

Preview tab > **View Report** button

Also accessible via:

User Home Page tab > **View Report** button

1. Click the **Preview** tab.
   The **Report Folder** section displays, with the available folders and reports.
2. Expand the applicable folder and click the report you want to run and view.
   The selected report name displays in the field next to the **View Report** button.
3. Click the **View Report** button.
   The report displays.
4. To refresh the report, click the **Refresh** button.
   The report refreshes.

Revise an Existing Report

Preview tab > **View Report** button

1. Click the **Preview** tab.
   The **Report Folder** section displays, with the available folders and reports.
2. Expand your USER folder and click the report you're revising.
   The selected report name displays in the field next to the **View Report** button.

3. Click the **View Report** button.
   The report displays.
4. Click the **Design** tab.
   The **Report Info** fields and design menus display.
5. Revise the following in the **Report Info** section, as applicable:
   - **Report Name**
   - **Report Author**
   - **Report Title**
   - **Report Description**
   - **Report Logo**
   - **Report Logo URL**
   - **Detail Row Format**
6. Revise report design elements by deleting, adding or modifying the design in the following sections:
   - **Report Info**
   - **Report Fields**
   - **Insert Groups**
   - **Insert Summaries**
   - **Insert Running Totals**
   - **Insert Charts**
   - **Insert Databars**
   - **Insert Indicators**
   - **Field Highlightings**
   - **Page Setup**
7. Click the **Create Report** button.
   The **Preview** tab displays with your revised report.

Print a Report

Preview tab > **Print** button

1. Click the **Preview** tab.
   The **Report Folder** section displays, with the available folders and reports.
2. Expand the applicable folder and click the report you want to print.
   The selected report name displays in the field next to the **View Report** button.
3. Click the **View Report** button.
   The report and the page navigation, refresh, zoom, export, print and Find/Next options display.
4. Click the **Print** button.
   The **Print** window displays.
5. Make the applicable selections in the **Page size** and **Page orientation** drop-down fields.
6. Click the **Print** button.

The report prints.

Export a Report

Preview tab > **Export** button

1. Click the **Preview** tab.
   The **Report Folder** section displays, with the available folders and reports.
2. Expand the applicable folder and click the report you want to export.
   The selected report name displays in the field next to the **View Report** button.
3. Click the **View Report** button.
   The report and the page navigation, refresh, zoom, export, print and Find/Next options display.
4. Click the down arrow next to the **Export** button.
   The export options display: **Excel**, **PDF** and **Word**.
5. Select the export format you want from the drop-down options.
   The report loads and displays in the selected format.

Delete a Report

Preview tab > **Delete Report** button

Also accessible via:

Admin tab > **Delete** button

User Home Page > **Manage Reports** button > **Delete** button

Be careful! Once you delete a report it can't be recovered.

1. Click the **Preview** tab.
   The **Report Folder** section displays, with the available folders and reports.
2. Locate the report you want to delete and click it to highlight it.
   The selected report is highlighted.
3. Click the **Delete Report** button.
   A confirmation window displays.
4. Click **OK**.

The report is deleted.

Rename a Report

Preview tab > **Rename Report** button

Also accessible via:

Admin tab > **Rename** button

User Home Page > **Manage Reports** button > **Rename** button

1. Click the **Preview** tab.
   The **Report Folder** section displays, with the available folders and reports.
2. Locate the report you want to rename and click it to highlight it.
   The selected report displays highlighted.
3. Click the **Rename Report** button.
   A window displays.
4. Enter the new name in the **Enter new name** field.
5. Click **Save**.
   The report displays with its new name.

Save (Move) a Report to a Folder

Preview tab > **Save to a Folder** button

1. Click the **Preview** tab.
   The **Report Folder** section displays, with the available folders and reports.
2. Locate the report you want to move to a different folder and click it to highlight it.
   The selected report displays highlighted.
3. Click the **Save to a Folder** button.
   A window displays.
4. From the drop-down, select the folder into which you want to move the report.
5. Click **OK**.
   The report is moved to the selected folder.

Create a New Report

Preview tab > **Create New Report** button

Also accessible via:

User Home Page > **Create New Report** button

Database tab

There is a 30 minute session time out! If you let the system be idle for half an hour, it will automatically log out. To save your selected fields, click the Preview button. Name the report to what you want and that will save your design and you can finish it another time.

If you click **Home** and then **Create New Report** while you are working on the Database tab, the old design information will not be saved.

To design and run a custom report:

1. On the **Preview** tab, click the **Create New Report** button.

   The **Database** tab displays with the Tables and Fields, Report Fields, Field Sorting and Query Filters sections.
2. In the **Tables and Fields** section, expand the table that contains the fields for the report you're creating. If you're not sure which Table is correct, browse through the tables.

   The fields included in the table display.
3. Click the check box for the fields you want to include in the report. To select/unselect all the fields at once, click the check box to the left of the table title.

   If you choose too many fields from too many tables, performance can be slow because the generated SQL takes time to run. It is recommended that you choose only the fields that are necessary for the report you are creating.
4. To include fields from another table, repeat steps 2 and 3 above.
5. Add the selected fields to the report: Click the **Add Fields** button or the **Add Report Fields** button (it's to the left of the **Report Fields** title).

   The fields display in the **Report Fields** section, with the **Expression**, **Title** and **Sorting** columns.

   The **Clear All** button removes all of the fields from the report **and** any design information.
6. Sort the fields, as applicable: In the **Sorting** column, click **Not sorted** for the field for which you want to sort the report data.

   The order in which you select the fields determines their position (sort order) in the report. You can change the order of the sort fields later if you want.

   The sort options display: **Not sorted**, **Ascending** and **Descending**.
7. Select **Ascending** or **Descending**, as applicable.

The selected field displays in the **Field Sorting** section.

8. Add additional fields for sorting, if applicable.
9. Make adjustments to the sort order, if needed. Click on the blue arrow button to the left of the sort field to change it's sort order:
   - **Ascending**
   - **Descending**
   - **Move to top**
   - **Move up**
   - **Move down**
   - **Move to bottom**
   - **Delete sorting**
10. Add filter fields, as applicable: In the **Query Filters** section, click the **Add Report Filters** button (it's to the left of the **Query Filters** title).

    The fields included in the report display in the **Query Filters** section.
11. Uncheck the fields that you do not want to set up as filters.
12. For the field(s) you selected to be a filter, click **starts with** (applies to non-date fields) or **is before** (applies to date field) and select the criteria that applies to the field:
    - **starts with** - the choices are starts with, contains, is equal to, is in list, does not start with, does not contain, is not equal to, is not in list, in sub query, is null, is not null
    - **is before** - the choices are is before (special date), is before (precise date), is after (special date), is after (precise date), is between, is (special date), is (precise date), is not (special date), is not (precise date), is maximum of, is null, is not null
13. For each field, click **[enter value]** or **[select value]** and select/enter the value that applies to the field:
    - **[enter value]** - type in the value
    - **[select value]** - the choices are Today, Yesterday, Tomorrow, First day of the month, First day of the year is the criteria chosen was for a special date. If the criteria chosen is for a precise date, the current date prepopulates; change the date to the desired date, if applicable.
14. The choices for filter fields are:
    - **All**
    - **Any**
    - **Not all**
    - **None**
15. Click the **Design** tab and complete the fields:
    - **Report Name** - Enter the name that should display on the report.
    - **Report Author** - Enter your name.
    - **Report Title** - Enter the name that will display on the report. By default the title displays left-aligned at the top of the report.
    - **Report Description** - Optional. Enter a description for the report. By default the description displays left-aligned under the Report Title.
    - **Report Logo** - Enter a description for the report.
    - **Report Logo URL** - Optional. To enter a website address that links to the website when the logo is clicked, paste the URL into the field.
    - **Detail Row Format** - Select the format for detail rows in the report so it is easier to read. The selections are **Alternate Row Color, Underline** or **Nothing**.

16. Make any additional design changes:
    - **Report Fields**
    - **Insert Groups**
    - **Insert Summaries**
    - **Insert Running Totals**
    - **Insert Charts**
    - **Insert Databars**
    - **Insert Indicators**
    - **Field Highlightings**
    - **Page Setup**
17. Click the **Create Report** button.

    The **Preview** tab displays with your newly designed report.

Admin Tab How To's

- ✓ Create a New Folder
- ✓ Delete a Report or Folder
- ✓ Rename a Report or Folder

Create a New Folder

Admin tab > **New Folder** button

Also accessible via:

User Home Page > > **Manage Reports** button > **New Folder** button

1. Click the **Admin** tab.
   The **Manage Reports** section displays, with the **Home**, **New Folder** and **Upload File** buttons.
2. Click the **New Folder** button.
   The **New Folder** window displays.
3. Enter the name for the new folder and click **Create**.
   The new folder displays in the **Manage Reports** section, and will display on the **Preview** tab in the USER folder.

Delete a Report or Folder

Admin tab > **Delete** button

Reports and folders can also be deleted via:

User Home Page > **Manage Reports** button > **Delete** button in the **Actions** column

A report (not a folder) can also be deleted via:

Preview tab > **Delete Report** button

Be careful! Once you delete a report or a folder, it can't be recovered.

1. Click the **Admin** tab.

The **Manage Reports** section displays, with the **Home**, **New Folder** and **Upload File** buttons. A table displays the existing reports and folders, if any.

2. Locate the report or folder you want to delete and click it's **Delete** button in the **Actions** column.
   A confirmation window displays.
3. Click **OK**.
   The report or folder is deleted.

Rename a Report or Folder

Admin tab > **Rename** button

Reports and folders can also be renamed via:

User Home Page > **Manage Reports** button > **Rename** button in the **Actions** column

A report (not a folder) can also be renamed via:

Preview tab > **Rename Report** button

1. Click the **Admin** tab.
   The **Manage Reports** section displays, with the **Home**, **New Folder** and **Upload File** buttons. A table displays the existing reports and folders, if any.
2. Locate the report or folder you want to rename and click it's **Rename** button in the **Actions** column.
   A confirmation window displays.
3. Click **OK**.
   The report or folder is renamed.

Home Page How To's

- ✓ Create a New Report
- ✓ Run, View and Refresh an Existing Report
- ✓ Create a New Folder
- ✓ Rename a Report or Folder
- ✓ Delete a Report or Folder
- ✓ Change the Report Datasource (Database)

Create a New Report

User Home Page > **Create New Report** button

Also accessible via:

Preview tab > **Create New Report** button

Database tab

✓ There is a 30 minute session time out! If you let the system be idle for half an hour, it will automatically log out. To save your selected fields, click the Preview button. Name the report to what you want and that will save your design and you can finish it another time.

If you click **Home** and then **Create New Report** while you are working on the Database tab, the old design information will not be saved.

To design and run a custom report:

1. On the **Home** page, click the **Create New Report** button.
   The **Database** tab displays with the Tables and Fields, Report Fields, Field Sorting and Query Filters sections.
2. In the **Tables and Fields** section, expand the table that contains the fields for the report you're creating. If you're not sure which Table is correct, browse through the tables.
   The fields included in the table display.
3. Click the check box for the fields you want to include in the report. To select/unselect all the fields at once, click the check box to the left of the table title.

✓ If you choose too many fields from too many tables, performance can be slow because the generated SQL takes time to run. It is recommended that you choose only the fields that are necessary for the report you are creating.

4. To include fields from another table, repeat steps 2 and 3 above.

5. Add the selected fields to the report: Click the **Add Fields** button or the **Add Report Fields** button (it's to the left of the **Report Fields** title).

   The fields display in the **Report Fields** section, with the **Expression**, **Title** and **Sorting** columns.

   ✓ The **Clear All** button removes all of the fields from the report **and** any design information.

6. Sort the fields, as applicable: In the **Sorting** column, click **Not sorted** for the field for which you want to sort the report data.

   ✓ The order in which you select the fields determines their position (sort order) in the report. You can change the order of the sort fields later if you want.

   The sort options display: **Not sorted**, **Ascending** and **Descending**.

7. Select **Ascending** or **Descending**, as applicable.

   The selected field displays in the **Field Sorting** section.

8. Add additional fields for sorting, if applicable.
9. Make adjustments to the sort order, if needed. Click on the blue arrow button to the left of the sort field to change it's sort order:
   - **Ascending**
   - **Descending**
   - **Move to top**
   - **Move up**
   - **Move down**
   - **Move to bottom**
   - **Delete sorting**
10. Add filter fields, as applicable: In the **Query Filters** section, click the **Add Report Filters** button (it's to the left of the **Query Filters** title).

    The fields included in the report display in the **Query Filters** section.

11. Uncheck the fields that you do not want to set up as filters.
12. For the field(s) you selected to be a filter, click **starts with** (applies to non-date fields) or **is before** (applies to date field) and select the criteria that applies to the field:
    - **starts with** - the choices are starts with, contains, is equal to, is in list, does not start with, does not contain, is not equal to, is not in list, in sub query, is null, is not null
    - **is before** - the choices are is before (special date), is before (precise date), is after (special date), is after (precise date), is between, is (special date), is (precise date), is not (special date), is not (precise date), is maximum of, is null, is not null
13. For each field, click **[enter value]** or **[select value]** and select/enter the value that applies to the field:
    - **[enter value]** - type in the value
    - **[select value]** - the choices are Today, Yesterday, Tomorrow, First day of the month, First day of the year is the criteria chosen was for a special date. If the criteria chosen is for a precise date, the current date prepopulates; change the date to the desired date, if applicable.
14. The choices for filter fields are:
    - **All**
    - **Any**
    - **Not all**
    - **None**

15. Click the **Design** tab and complete the fields:
    - **Report Name** - Enter the name that should display on the report.
    - **Report Author** - Enter your name.
    - **Report Title** - Enter the name that will display on the report. By default the title displays left-aligned at the top of the report.
    - **Report Description** - Optional. Enter a description for the report. By default the description displays left-aligned under the Report Title.
    - **Report Logo** - Enter a description for the report.
    - **Report Logo URL** - Optional. To enter a website address that links to the website when the logo is clicked, paste the URL into the field.
    - **Detail Row Format** - Select the format for detail rows in the report so it is easier to read. The selections are **Alternate Row Color, Underline** or **Nothing**.
16. Make any additional design changes:
    - **Report Fields**
    - **Insert Groups**
    - **Insert Summaries**
    - **Insert Running Totals**
    - **Insert Charts**
    - **Insert Databars**
    - **Insert Indicators**
    - **Field Highlightings**
    - **Page Setup**
17. Click the **Create Report** button.
    The **Preview** tab displays with your newly designed report.

Run, View and Refresh an Existing Report

User Home Page tab > **View Report** button

Also accessible via:

Preview tab > **View Report** button

1. On the User Home Page, click the **View Report** button.
   The **Report Folder** section displays, with the available folders and reports.
2. Expand the applicable folder and click the report you want to run and view.
   The selected report name displays in the field next to the **View Report** button.
3. Click the **View Report** button.
   The report displays.
4. To refresh the report, click the **Refresh** button.
   The report refreshes.

Create a New Folder

User Home Page > **Manage Reports** button > **New Folder** button

Also accessible via:

Admin tab > **New Folder** button

1. Click the **Manage Reports** button on the Home page.
   The **Manage Reports** section displays, with the **Home**, **New Folder** and **Upload File** buttons.
2. Click the **New Folder** button.
   The **New Folder** window displays.
3. Enter the name for the new folder and click **Create**.
   The new folder displays in the **Manage Reports** section, and will display on the **Preview** tab in the USER folder.

Rename a Report or Folder

User Home Page > **Manage Reports** button > **Rename** button in the **Actions** column

Reports and folders can also be renamed via:

Admin tab > **Rename** button

A report (not a folder) can also be renamed via:

Preview tab > **Rename Report** button

1. Click the **Manage Reports** button on the Home page.
   The **Manage Reports** section displays, with the **Home**, **New Folder** and **Upload File** buttons. A table displays the existing reports and folders, if any.
2. Locate the report or folder you want to rename and click it's **Rename** button in the **Actions** column.
   A confirmation window displays.
3. Click **OK**.
   The report or folder is renamed.

Delete a Report or Folder

User Home Page > **Manage Reports** button > **Delete** button in the **Actions** column

Reports and folders can also be deleted via:

Admin tab > **Delete** button

A report (not a folder) can also be deleted via:

Preview tab > **Delete Report** button

Be careful! Once you delete a report or a folder, it can't be recovered.

1. Click the **Manage Reports** button on the Home page.
   The **Manage Reports** section displays, with the **Home**, **New Folder** and **Upload File** buttons. A table displays the existing reports and folders, if any.
2. Locate the report or folder you want to delete and click it's **Delete** button in the **Actions** column.
   A confirmation window displays.
3. Click **OK**.
   The report or folder is deleted.

Change the Report Datasource (Database)

Home Page > **Change Datasource** button

1. Click the **Change Datasource** button on the Home page.
   The **Admin** tab, the **Change Report Datasource** list of databases displays.
2. Locate the database to which you want to switch and click its radio button.
3. Click the **Apply Change** button. If you want to not only change to that database, but also want to make it the default database, click the **Set As Default** button.
   If you clicked the **Apply Change** button, the **Database** tab displays with the Tables and Fields within the database.
   If you clicked the **Set As Default** button, an **Alert** confirmation window displays. Click **Ok**.

Create a New Report - Active Employee Listing Example

The steps below take you through the steps, from start to finish, to create a Personnel Listing report.

This example includes the following fields, sorts and filters:

- Personnel Employee _Name, Ascending sort
- Personnel Employee_Number, Ascending sort
- Personnel Facility_Code, filter (is not equal to, value = [facility code])
- Personnel Status, filter (is equal to, value = Active). This field will be hidden from view.
- Personnel Type

The following design features are applied:

- Change Display Name, Column Width, Bolding, Font Color, Hide a field (Personnel Status)
- Group (Facility_Code)
- Summaries (Facility_Code in two locations)
- Column Chart
- Field Highlighting (Contractor employee type)

✓

> There is a 30 min. session time out. If you let the system be idle for half an hour, it will automatically log out. To save your selected fields, click the Preview button. Name the report to what you want and that will save your design and you can finish it another time.
>
> If you click **Home** and then **Create New Report** while you are working on the Database tab, the old design information will not be saved.

Access the Database tab

1. On the Ad Hoc Reporting Home page, click the **Create New Report** button.
   The **Tables and Fields**, **Report Fields**, **Field Sorting** and **Query Filters** sections display.

Select the report Table

1. In the **Tables and Fields** section, expand the **Personnel** table (you may have to scroll down to get to the Personnel table).
   The fields included in the table display.

Select the report Fields

1. Click the check box for the following fields to include them in the report:
   - Employee_Name
   - Employee_Number
   - Facility_Code
   - Status

- Type

2. Click the **Add Fields** button (you may have to scroll down to see it) or the **Add Report Fields** button (it's to the left of the **Report Fields** section title).

   The fields display in the **Report Fields** section, with the **Expression**, **Title** and **Sorting** columns.

Sort the report Fields

1. In the **Report Fields** section in the **Sorting** column, click **Not sorted** for the **Personnel Employee_Name** field.

   ✓ The order in which you select the fields determines their position (sort order) in the report. You can change the order of the sort fields later if you want.

   The sort options display: **Not sorted**, **Ascending** and **Descending**.

2. Select **Ascending**.

   The **Personnel Employee_Name** field displays in the **Field Sorting** section.

3. Back in the **Report Fields** section, click **Not sorted** for the **Personnel Facility_Code** field.

   The sort options display: **Not sorted**, **Ascending** and **Descending**.

4. Select **Ascending**.

   The **Personnel Facility_Code** field displays in the **Field Sorting** section underneath **Personnel Employee_Name**.

Add report Query Filters

1. In the **Query Filters** section, click the **Add Report Filters** button (it's to the left of the **Query Filters** title).

   The fields included in the report display in the **Query Filters** section.

2. Complete the following:
   - Uncheck the check box for **Personnel Employee_Name**
   - Uncheck the check box for **Personnel Employee_Number**
   - For **Personnel Facility Code**, click "**starts with**" and select "**is not equal to**". In the "**[enter value]**" field, enter a facility code that you want to exclude from the report.
   - For **Personnel Status**, click "**starts with**" and select "**is equal to**". Click **[enter value]** and enter "**Active.**"
   - Uncheck the check box for **Personnel Type**

Modify the default Report Info Fields

1. Click the **Design** tab and complete the **Report Info** fields:
   - **Report Name** - For this example, enter "Personnel Listing Example".
   - **Report Author** - Enter your name.
   - **Report Title** - Enter "Personnel Listing".
   - **Report Description** - Enter "Active Personnel Directory".
   - **Report Logo** - Select a logo if available.
   - **Report Logo URL** - Not used in this example.
   - **Detail Row Format** - Leave as the default (Alternate Row Color).

2. Click the **Create Report** button or **Preview** tab to apply the design change and to see the changes to the **Report**

Info fields.

The **Preview** tab displays with the report.

3. Click the **Design** tab to continue with the next design change.

   The **Design** tab for the report displays.

Modify the properties of the report Fields

1. Click the **Report Fields** menu.

   The **Report Fields** table displays with the fields included in the report and the options that can be applied to each field.

2. Complete the following for the report fields:
   - Personnel Employee_Name: Display Name - **Employee Name,** Width = **120**, check the **Bold** check box, Font Color select **red**
   - Personnel Employee_Number: Display Name - **Employee No**, Width = **70**
   - Personnel Facility_Code: Display Name - **Facility Code,** Width = **70**
   - Personnel Status: Show check box - **uncheck** (we have already applied a filter that will include only Active employees in the report)
   - Personnel Type: Display Name - **Employee Type**, Width = **70**

3. Click the **Create Report** button or **Preview** tab to apply the design change and to see the changes to the report fields.

   The **Preview** tab displays with the report.

4. Click the **Design** tab to continue with the next design change.

   The **Design** tab for the report displays.

Insert a Group

1. Click the **Insert Groups** menu.

   The **Insert Report Groups** fields display with the available fields and the Sort options.

2. In the **Available Fields** list click **Facility_Code**.

3. Click the **Add Report Group** button.

   The added group displays with the **Facility_Code** field in the **Group by** column.

4. In the **Sort** column drop-down, leave the default **Ascending**.

5. Click the **Create Report** button or **Preview** tab to apply the design change and to see the added group in the report.

   The **Preview** tab displays with the report.

6. Click the **Design** tab to continue with the next design change.

   The **Design** tab for the report displays.

Insert two Summaries

1. Click the **Insert Summaries** menu.

   The **Insert Summaries** table displays.

2. Complete the following:
   - **Choose the Field to Summary** - select **Facility_Code** from the drop-down.
   - **Summary Type** - select **Count** from the drop-down.
   - **Summary Location** - select **Facility_Code** from the drop-down.
   - **Show As Percentage of** - leave as default **Grand Total**
3. Click the **Insert Summary** button.

   The added summary displays.
4. Complete the following to add the second summary:
   - **Choose the Field to Summary** - select **Facility_Code** from the drop-down if it is not already selected.
   - **Summary Type** - select **Count** from the drop-down if it is not already selected.
   - **Summary Location** - select **Grand Total (Report Footer)** from the drop-down.
5. Click the **Insert Summary** button.

   The summary displays below the first summary.
6. Click the **Create Report** button or **Preview** tab to apply the design change and to see the added summaries in the report.

   The **Preview** tab displays with the report.
7. Click the **Design** tab to continue with the next design change.

   The **Design** tab for the report displays.

Insert a Column Chart

1. Click the **Insert Charts** menu.

   The **Insert Charts** chart types display: **Column Chart**, **Shape (Pie, Funnel)**, **Bar Chart**, **Area Chart** and **Line Chart**.
2. Click **Column Chart** if it is not already selected.

   The **Insert Charts** fields display with **Column Chart** display options and the **Arrange Chart Data** fields.
3. In the **Column Chart** gallery, the first chart option is selected by default. Leave this as is.
4. In the **Available Fields** list click **Facility_Code**.
5. Click the right arrow in the **Categories** section.

   Facility_Code displays in the **Category** and **Title** fields.
6. Change the title to **Facility Code** (remove the underscore).
7. Click the right arrow in the **Values** section (**Facility_Code** is still selected in the **Available fields** list).

   CountDistinct(Personnel Facility_Code) displays in the **Value** field and **Facility_Code** in the **Title** field.
8. In the **Values** field, select **Count(Personnel Facility_Code)** from the drop-down.
9. In the **Chart Title** field, change the default title to **Facility Code Column Chart**.
10. Leave the default values in the **Chart Width** and **Chart Height** fields.
11. Click the **Create Report** button or **Preview** tab to apply the design change and to see the column chart in the report.

    The **Preview** tab displays with the report.
12. Click the **Design** tab to continue with the next, and last, design change.

    The **Design** tab for the report displays.

Add Field Highlighting

1. Click the **Field Highlightings** menu.
   The **Report Field Highlighting** fields display.
2. Complete the following:
   - **Highlighting Field** - select **Type** from the drop-down.
   - **Condition Field** - select **Type** from the drop-down.
   - **Operation** - select **equal to** from the drop-down if it is not the default.
   - **Value 1** - type **Contractor**.
   - **Font Color** - leave as the default, **black**.
   - **Background** - select **yellow** from the drop-down chart.
3. Click the **Inserting Highlighting** button.
   The added highlighting displays.
4. Click the **Create Report** button or **Preview** tab to apply the design change and to see the added highlighting.
   The **Preview** tab displays with the report.