

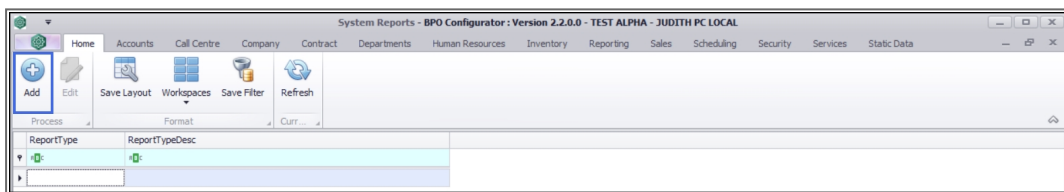
REPORTING

ADD A NEW REPORT

Ribbon Access: Configurator > Reporting > System Reports



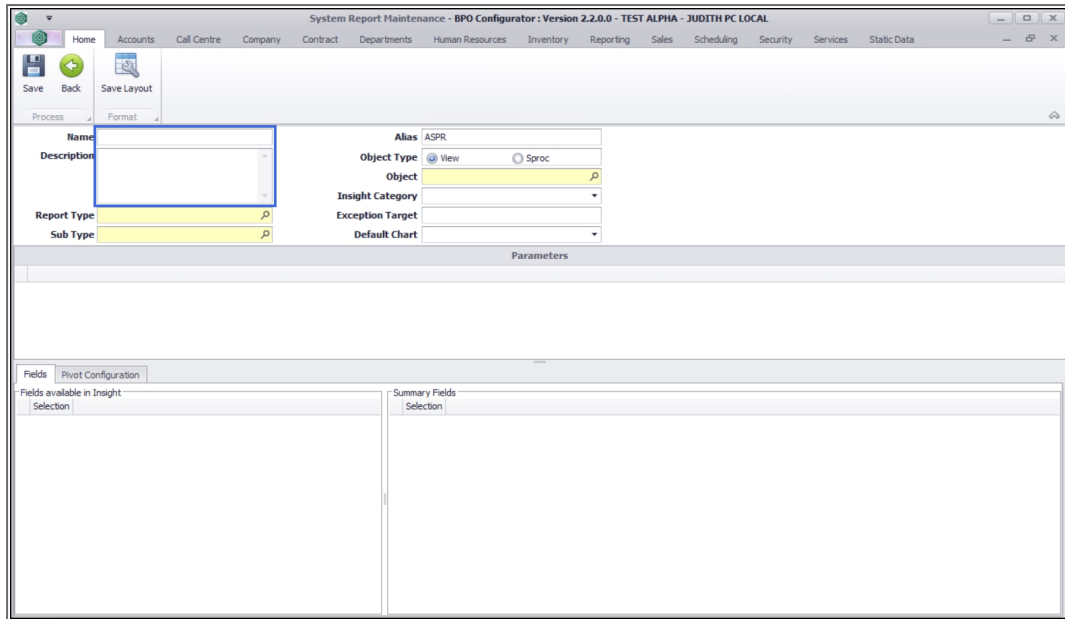
- The **System Reports** screen will be displayed.
- Click on **Add**.



The **System Reports Maintenance** screen will be displayed.

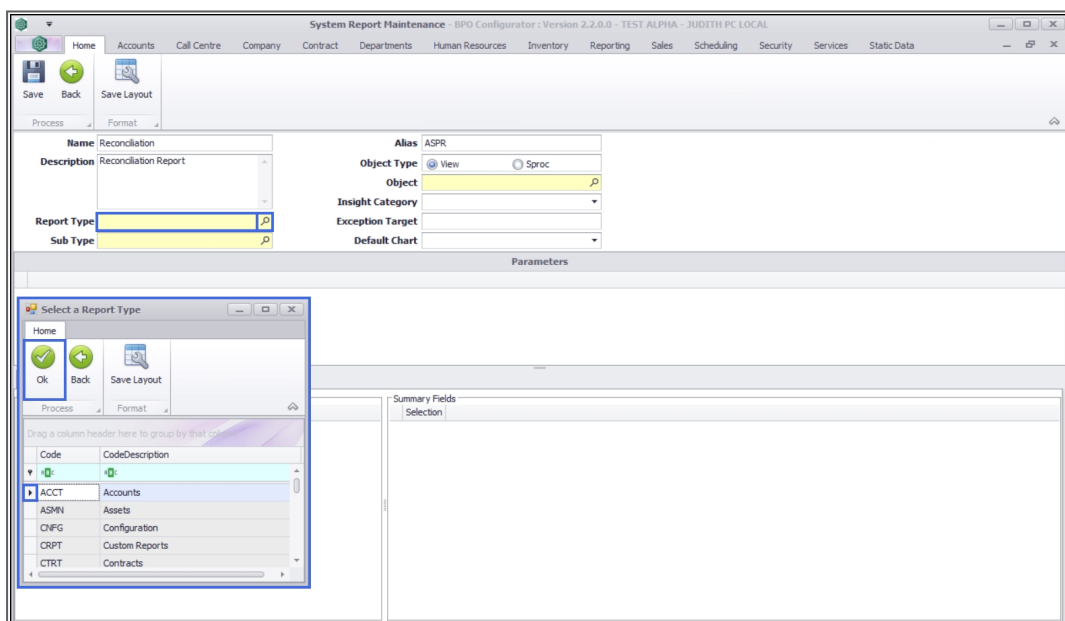
REPORT NAME AND DESCRIPTION

- **Name:** Type in the name of the report.
- **Description:** Type in the description of the report.



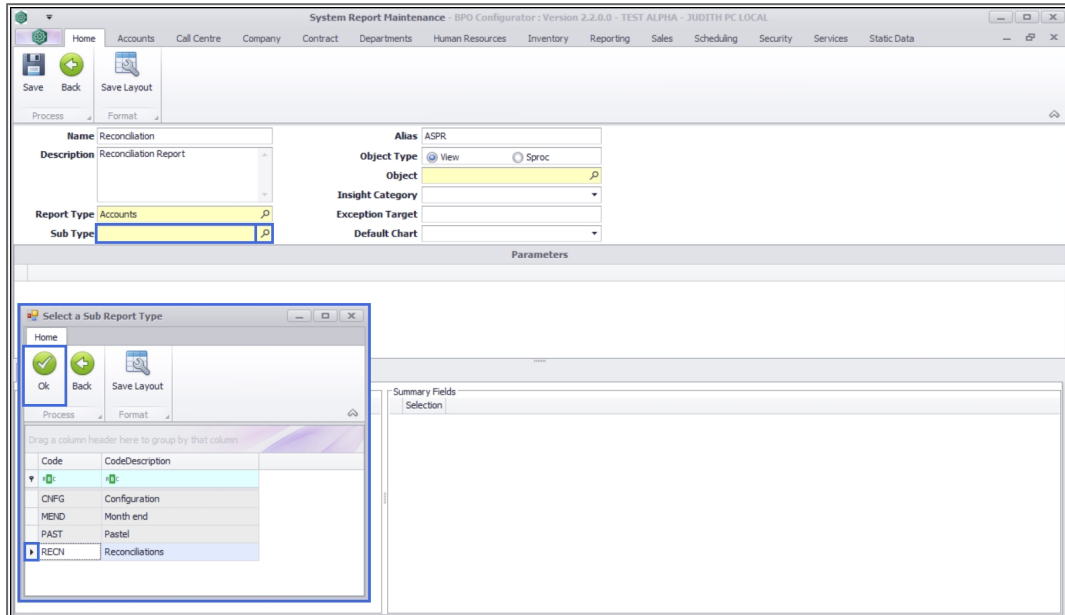
REPORT TYPE

Report Type: Click on the *Search* icon and select the applicable report type from the *Select A Report Type* pop up screen.



SUB TYPE

Sub Type: Click on the *Search* icon and select the applicable sub-report type from the *Select a Sub Report Type* screen.

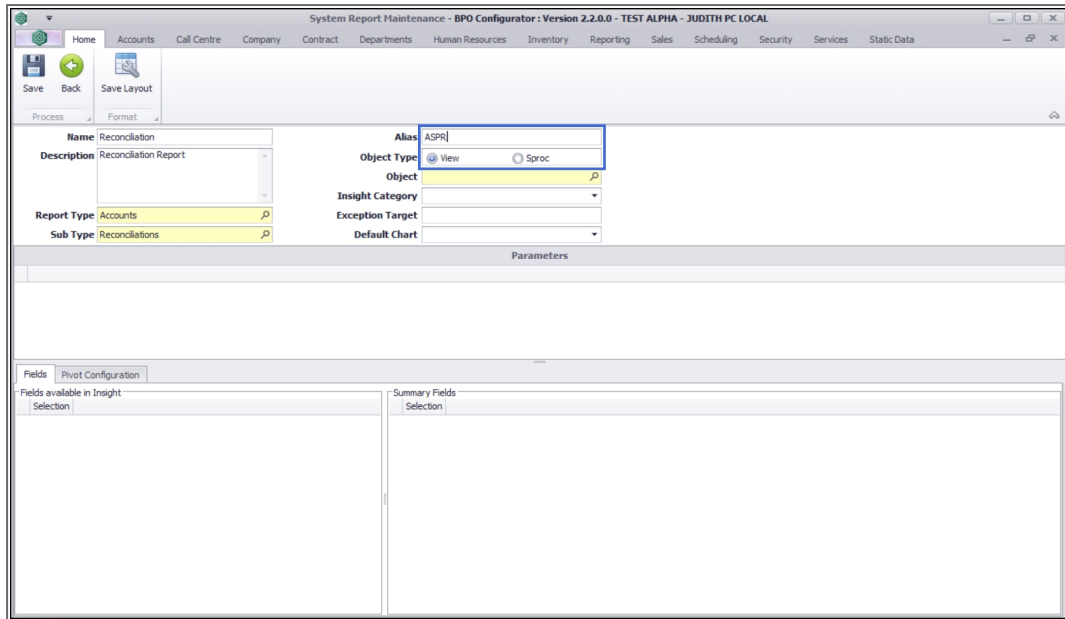


ALIAS

Alias: This will be populated by default.

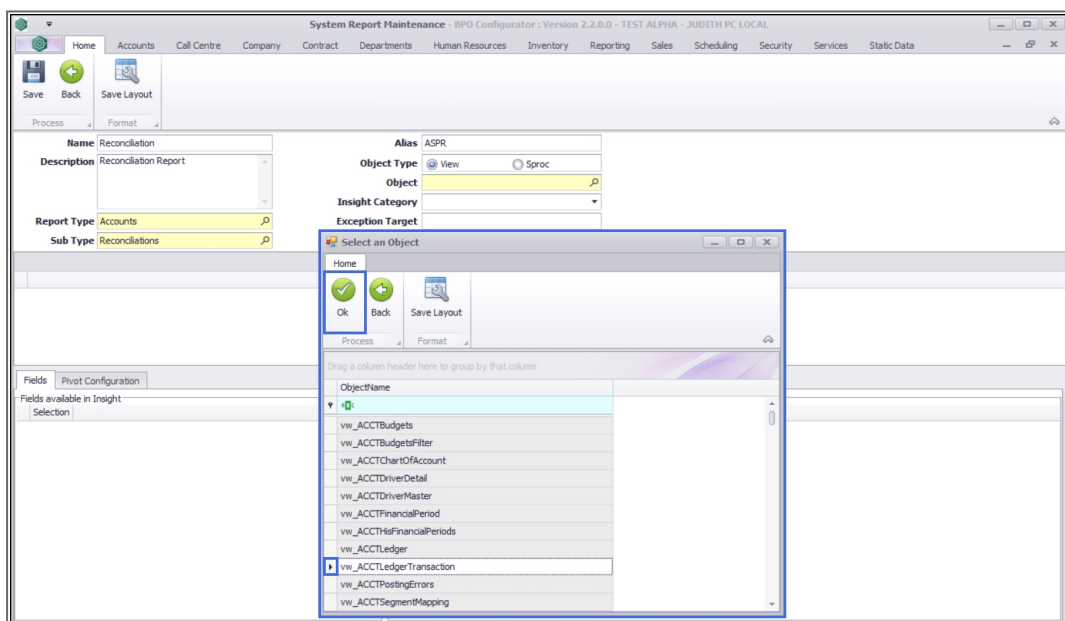
OBJECT TYPE

Object Type: *View* will be selected by default. Select the required option.



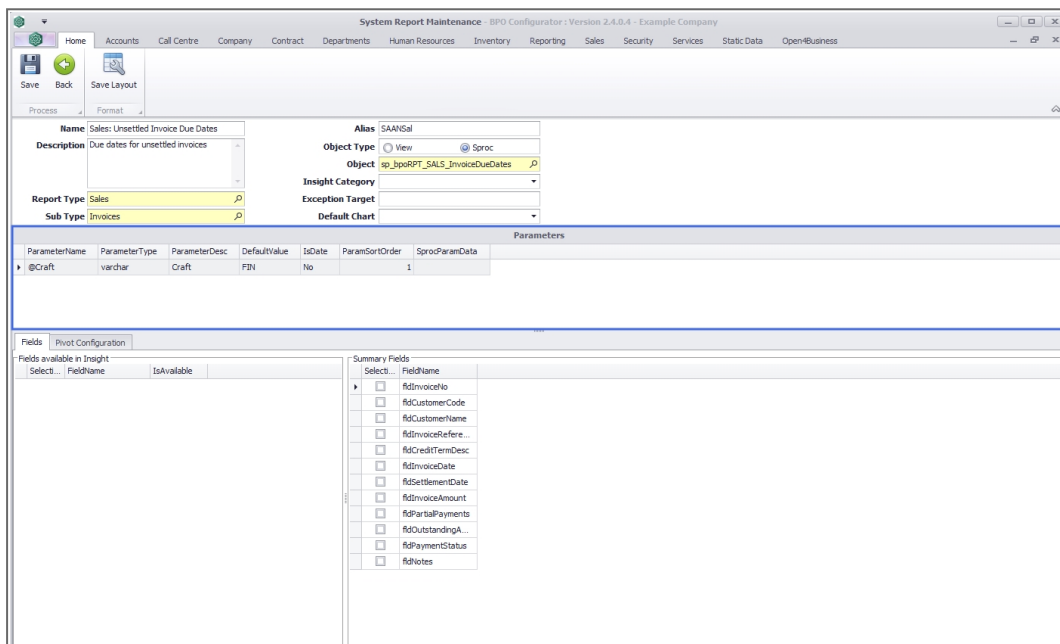
OBJECT

Object: Click on the **Search** icon and select the applicable object from the **Select an Object** screen.



PARAMETERS

- Report parameters enable you to control report data by returning specific results, such as a date range. Only reports creating with a Sproc (stored procedure) type object, contain paramaters (so this option is not available for View object type reports).
- The available parameters will be listed once the Sproc Object has been selected.



The screenshot shows the 'System Report Maintenance - BPO Configurator' window. The 'Parameters' section is highlighted, showing a table with the following data:

ParameterName	ParameterType	ParameterDesc	DefaultValue	IsDate	ParamSortOrder	SprocParamData
@Craft	varchar	Craft	FIN	No	1	

Below the table, there are sections for 'Fields' and 'Summary Fields' with checkboxes for selecting fields to include in the report.

PARAMETER INPUT VALUES

Version Compatibility¹

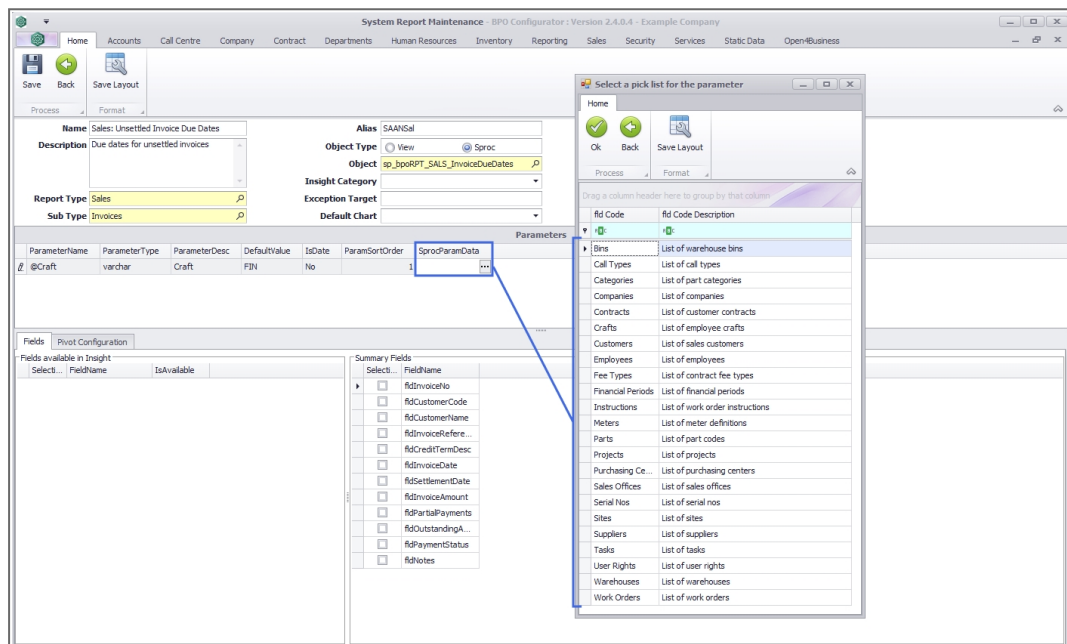
- You can select parameter input values from a drop-down list where a pick list has been defined for all parameters except for

¹ BPO2 v2.5.0.8 or higher

Dates. Input values can still be manually typed, but these will now be validated against records generated in the pick list.

- Parameters that have not been assigned a pick list code, will appear as a regular text edit control, while parameters that have been assigned a pick list code, will appear as a drop-down list.

In this example, I am going to select the Craft pick list to assign to the Craft Parameter.



Now when pulling the report in BPO, a list of crafts as configured in the system will appear in a selection list.



- System Report Maintenance - BPO Configurator: Version 2.2.0.0 - TEST ALPHA - JUDITH PC LOCAL

HomeAccountsCall CentreCompanyContractDepartmentsHuman ResourcesInventoryReportingSalesSchedulingSecurityServicesStatic Data

SaveBackSave Layout

ProcessFormat

NameReconciliation

DescriptionReconciliation Report

Report TypeAccounts

Sub TypeReconciliations

AliasASPR

Object TypeView

Objectvw_ACCTLedgerTransaction

Insight Category

Exception Target

Default Chart

Parameters

FieldsPivot Configuration

Fields available in Insight

Select...	FieldName	IsAvailable
<input type="checkbox"/>	fdJournalNumberID	No
<input type="checkbox"/>	fdAttributeCode	No
<input type="checkbox"/>	fdAttributeValue	No

Summary Fields

Select...	FieldName
<input type="checkbox"/>	fdJournalNumberID
<input type="checkbox"/>	fdAttributeCode
<input type="checkbox"/>	fdAttributeValue

INSIGHT CATEGORY

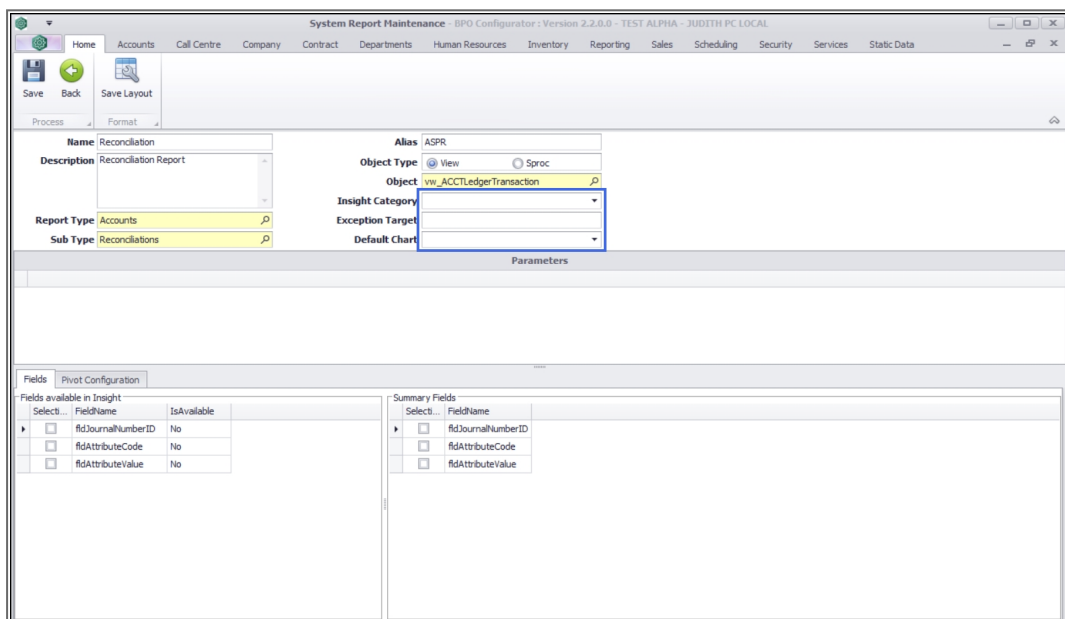
Click on the down arrow and select the required option.

EXCEPTION TARGET

Type in the Exception Target if required.

DEFAULT CHART

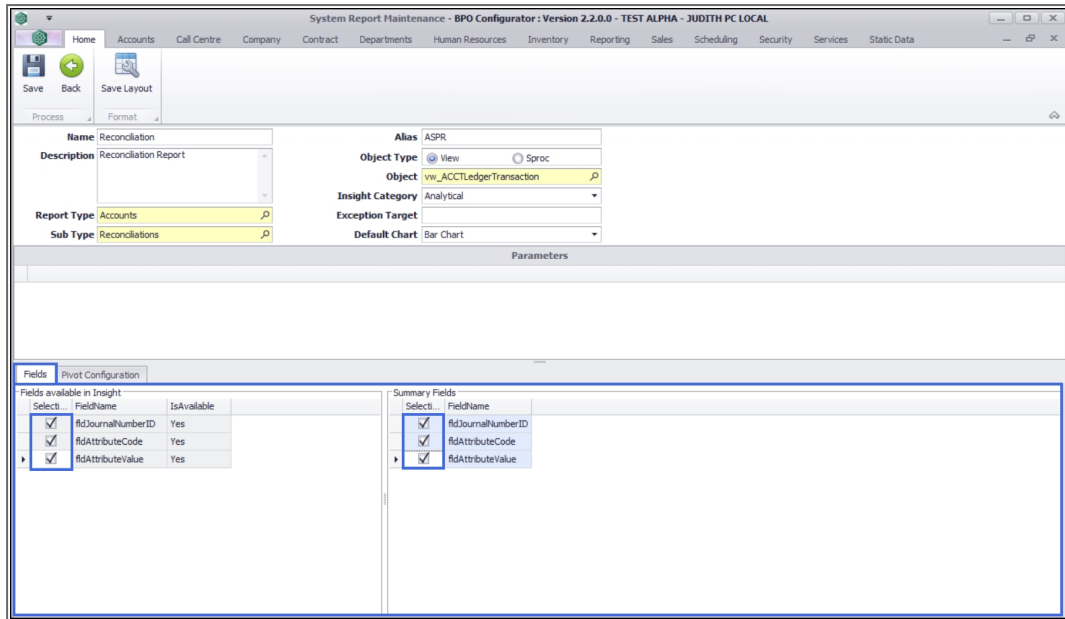
Click on the down arrow and select the required default chart.



The screenshot shows the 'System Report Maintenance - BPO Configurator' window. The 'Name' field is 'Reconciliation', 'Description' is 'Reconciliation Report', 'Report Type' is 'Accounts', and 'Sub Type' is 'Reconciliations'. The 'Alias' is 'ASPR', 'Object Type' is 'View', and 'Object' is 'vw_ACCTLedgerTransaction'. The 'Insight Category' dropdown is highlighted with a blue box. Below the main configuration, there are sections for 'Fields' and 'Summary Fields' with checkboxes for selecting fields to include in the report.

FIELDS

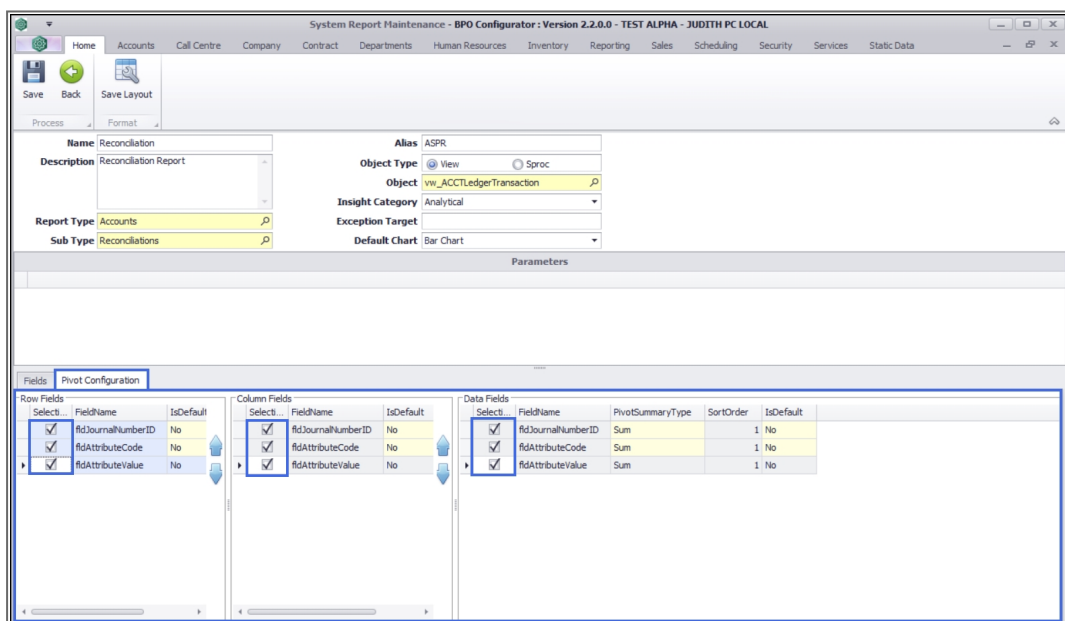
Select all the fields you would like to see in the report. It is recommended that you select all the available fields.



Select	FieldName	IsAvailable
<input checked="" type="checkbox"/>	fldJournalNumberID	Yes
<input checked="" type="checkbox"/>	fldAttributeCode	Yes
<input checked="" type="checkbox"/>	fldAttributeValue	Yes

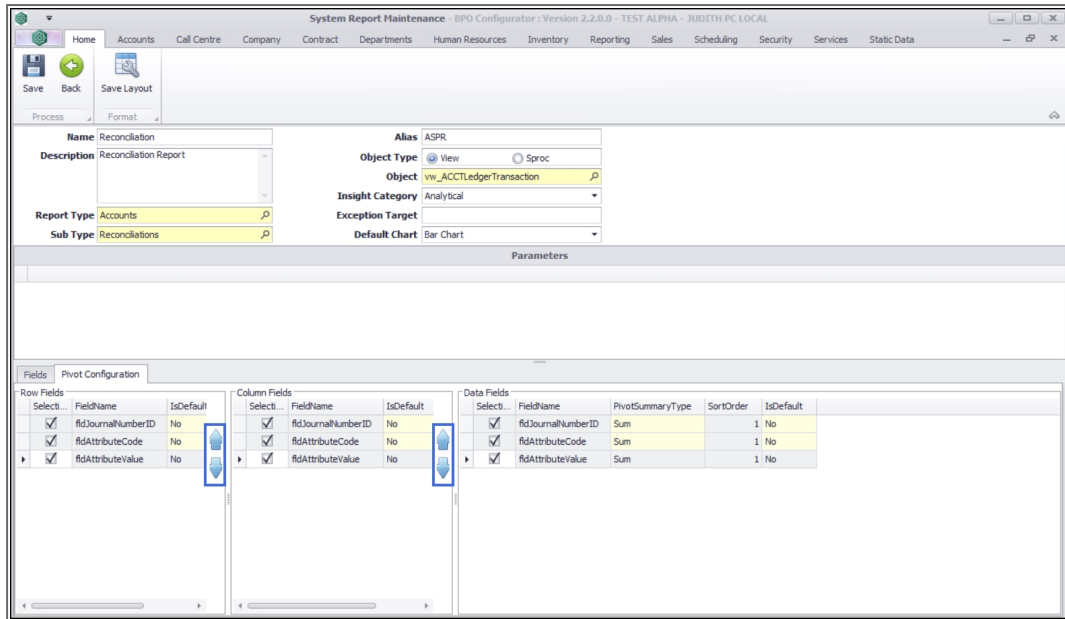
PIVOT CONFIGURATION

Select all the fields you would like to see in the report. It is recommended that you select all the available fields.



Select	FieldName	IsDefault
<input checked="" type="checkbox"/>	fldJournalNumberID	No
<input checked="" type="checkbox"/>	fldAttributeCode	No
<input checked="" type="checkbox"/>	fldAttributeValue	No

- Click on the **blue arrows** to move the fields up or down.



System Report Maintenance - BPO Configurator : Version 2.2.0.0 - TEST ALPHA - JUDITH PC LOCAL

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Back Save Layout

Process Format

Name: Reconciliation
Description: Reconciliation Report
Report Type: Accounts
Sub Type: Reconciliations

Alias: ASPR
Object Type: View
Object: vw_ACCTLedgerTransaction
Insight Category: Analytical
Exception Target:
Default Chart: Bar Chart

Parameters:

Fields: Pivot Configuration

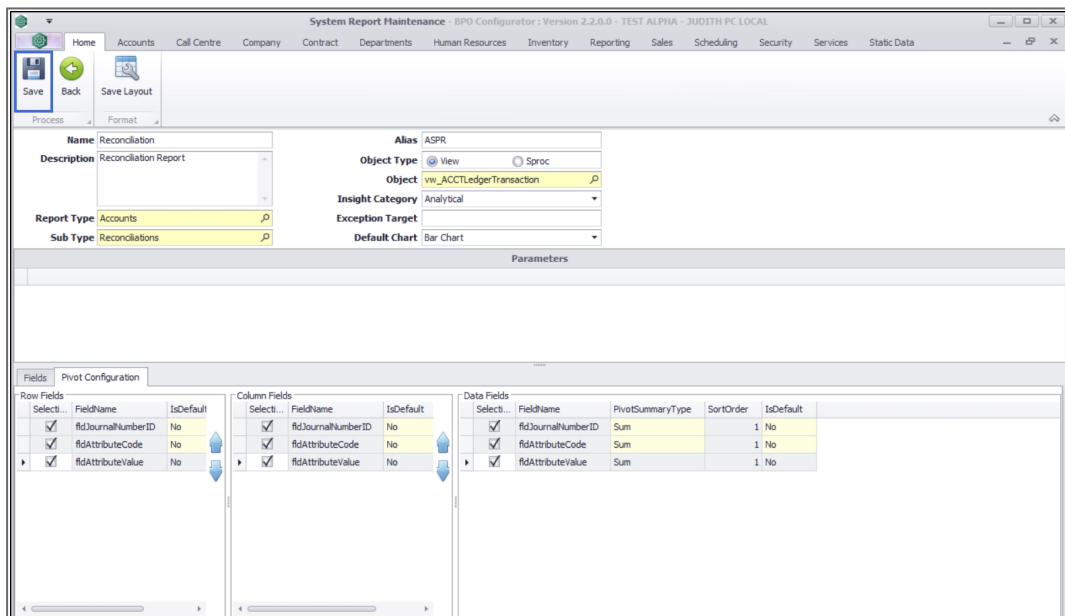
Row Fields	Field Name	Select	Is Default
<input checked="" type="checkbox"/>	fldJournalNumberID	<input checked="" type="checkbox"/>	No
<input checked="" type="checkbox"/>	fldAttributeCode	<input checked="" type="checkbox"/>	No
<input checked="" type="checkbox"/>	fldAttributeValue	<input checked="" type="checkbox"/>	No

Column Fields	Field Name	Select	Is Default
<input checked="" type="checkbox"/>	fldJournalNumberID	<input checked="" type="checkbox"/>	No
<input checked="" type="checkbox"/>	fldAttributeCode	<input checked="" type="checkbox"/>	No
<input checked="" type="checkbox"/>	fldAttributeValue	<input checked="" type="checkbox"/>	No

Data Fields	Field Name	PivotSummaryType	SortOrder	Is Default
<input checked="" type="checkbox"/>	fldJournalNumberID	Sum	1	No
<input checked="" type="checkbox"/>	fldAttributeCode	Sum	1	No
<input checked="" type="checkbox"/>	fldAttributeValue	Sum	1	No

SAVE REPORT

- When you are done, click on **Save**.



System Report Maintenance - BPO Configurator : Version 2.2.0.0 - TEST ALPHA - JUDITH PC LOCAL

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Save Back Save Layout

Process Format

Name: Reconciliation
Description: Reconciliation Report
Report Type: Accounts
Sub Type: Reconciliations

Alias: ASPR
Object Type: View
Object: vw_ACCTLedgerTransaction
Insight Category: Analytical
Exception Target:
Default Chart: Bar Chart

Parameters:

Fields: Pivot Configuration

Row Fields	Field Name	Select	Is Default
<input checked="" type="checkbox"/>	fldJournalNumberID	<input checked="" type="checkbox"/>	No
<input checked="" type="checkbox"/>	fldAttributeCode	<input checked="" type="checkbox"/>	No
<input checked="" type="checkbox"/>	fldAttributeValue	<input checked="" type="checkbox"/>	No

Column Fields	Field Name	Select	Is Default
<input checked="" type="checkbox"/>	fldJournalNumberID	<input checked="" type="checkbox"/>	No
<input checked="" type="checkbox"/>	fldAttributeCode	<input checked="" type="checkbox"/>	No
<input checked="" type="checkbox"/>	fldAttributeValue	<input checked="" type="checkbox"/>	No

Data Fields	Field Name	PivotSummaryType	SortOrder	Is Default
<input checked="" type="checkbox"/>	fldJournalNumberID	Sum	1	No
<input checked="" type="checkbox"/>	fldAttributeCode	Sum	1	No
<input checked="" type="checkbox"/>	fldAttributeValue	Sum	1	No

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