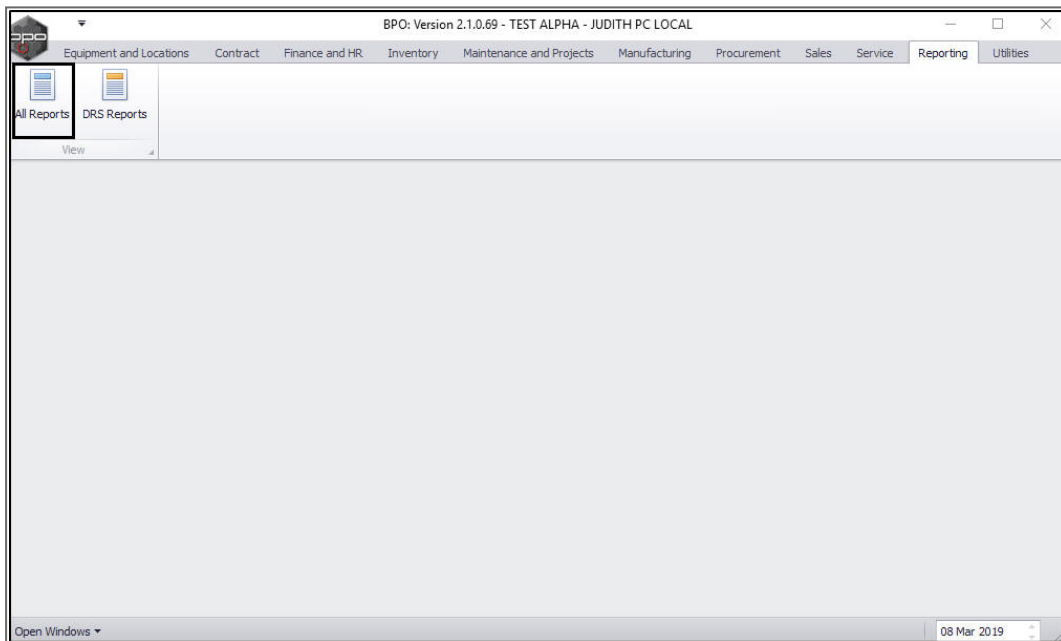**BACK**

REPORTING

ALL REPORTS – EXPORT AND PIVOT CHART

Introduction

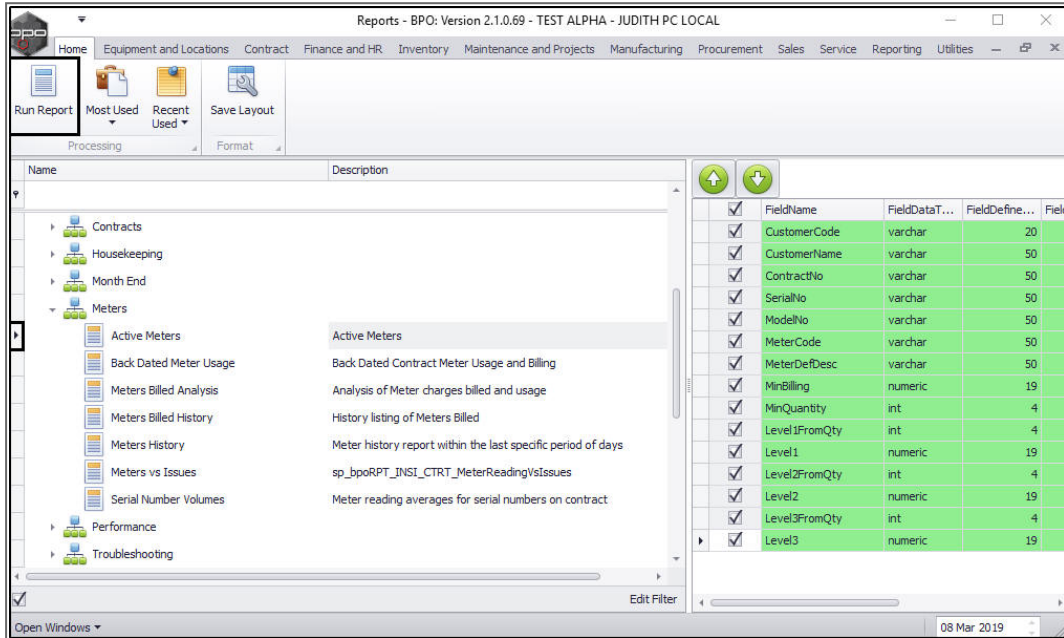In **BPO**, you can export a report to **Excel** or **PDF** as well as create a report **pivot chart**.

Ribbon Access: *Reporting > All Reports*
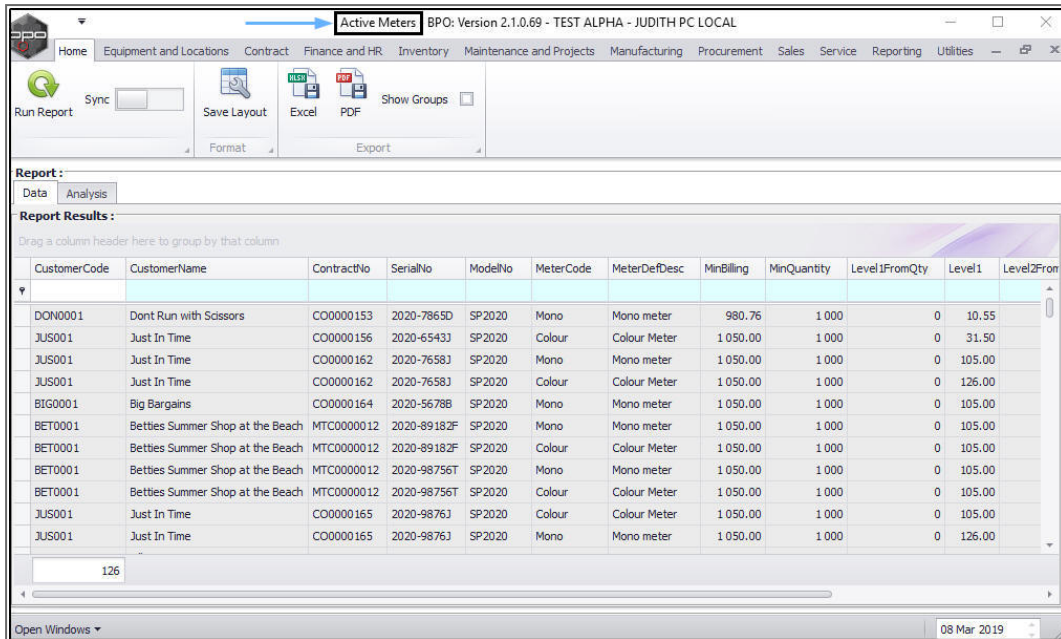

The *Reports* screen will be displayed.

SELECT AND RUN REPORT

- Browse or search for the report you want to view.
  - In this image, *Active Meters* has been selected.
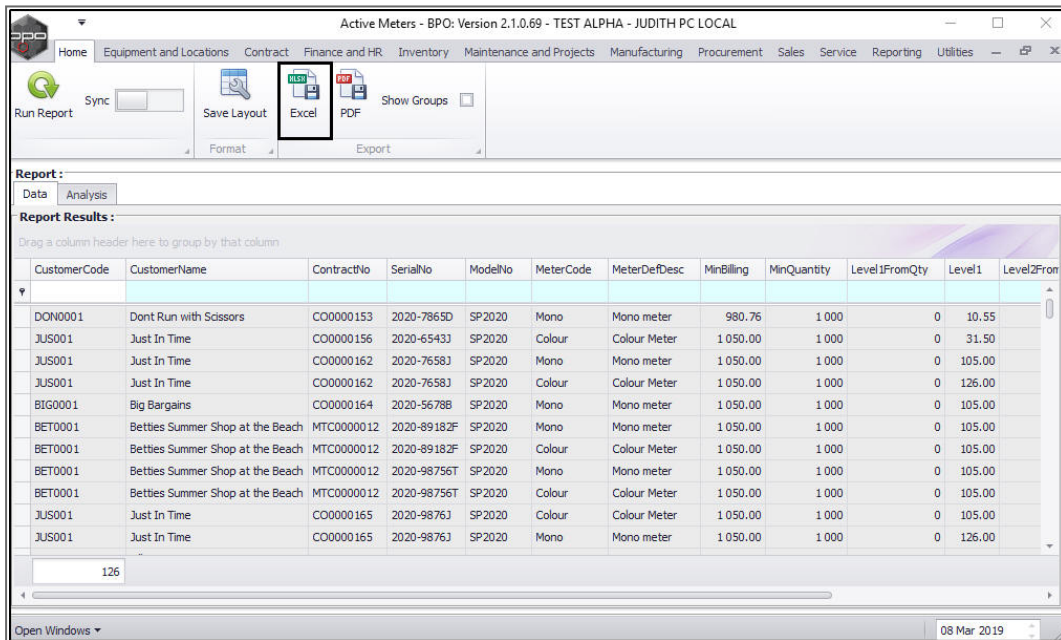- Click on *Run Report*.

- The report screen specific to the selected report will be displayed.

  - In this image, the *Active Meters* screen has been displayed.

EXPORT REPORT TO EXCEL

- Click on *Excel*.

- This will open *MS Excel* with a new spreadsheet and load all the data from the data grid into that spreadsheet.
- You can then save, view, search for data, prepare it for printing, etc. as required.

EXPORT REPORT TO PDF

- Click on *PDF*

- The data from the data grid will be displayed in the *PDF Reader*.
- You can then save, view, print the data etc. as required.

SELECTING AND COPYING DATA

To select *all* data in the data grid:

Either,

- **Right click** and click on **Select All** from the pop up **Process** menu.

Or,

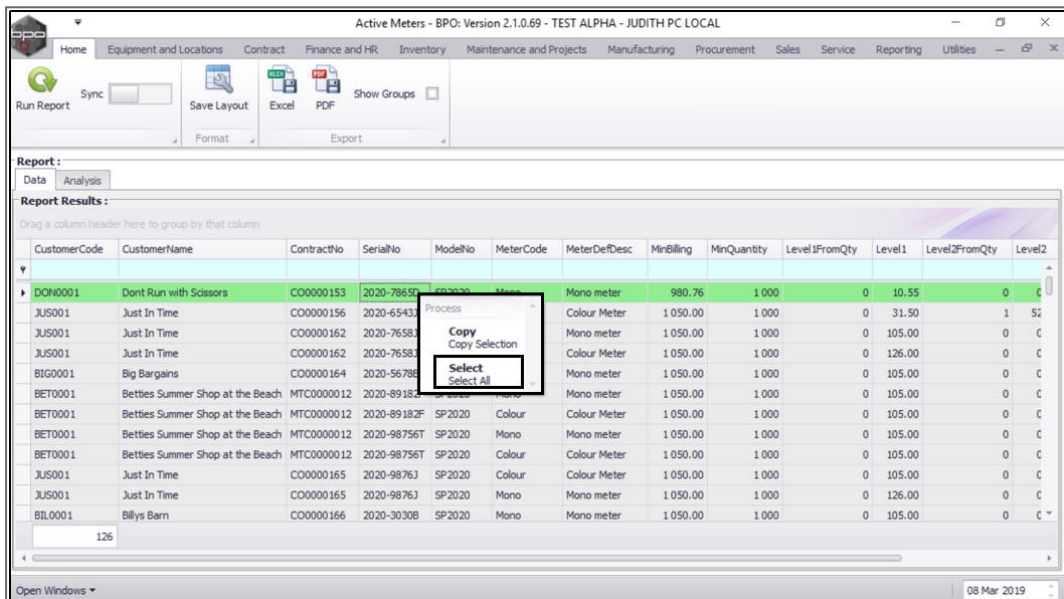- Press **Ctrl + A** on the keyboard.

To copy *selected* data in the data grid,

Either,

- **Right click** and then click on **Copy Selection** from the pop up **Process** menu.

or,

- Press **Ctrl + C** on the keyboard.
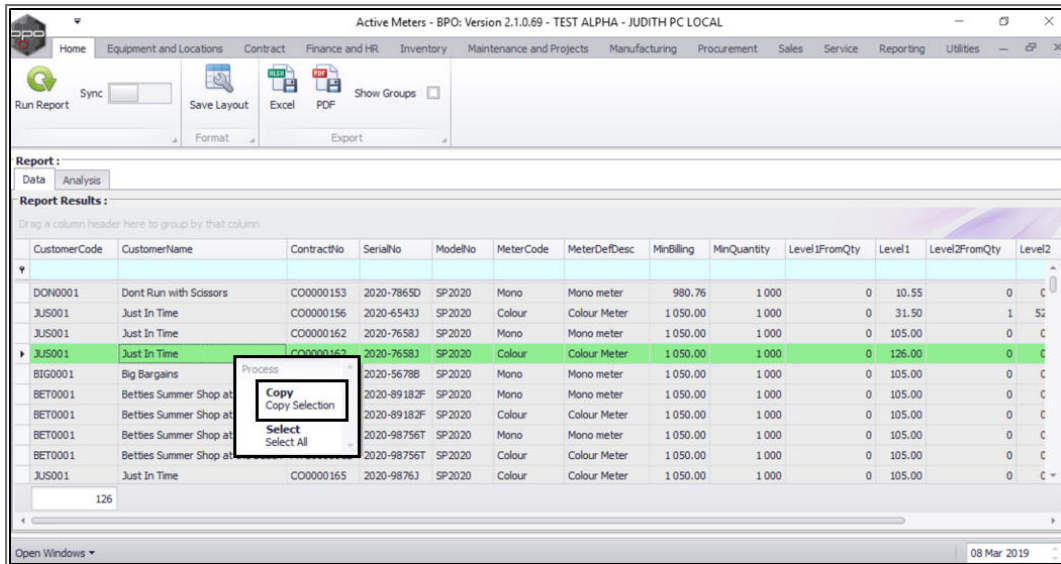
CREATE PIVOT CHART

- Click on the *Analysis* tab.
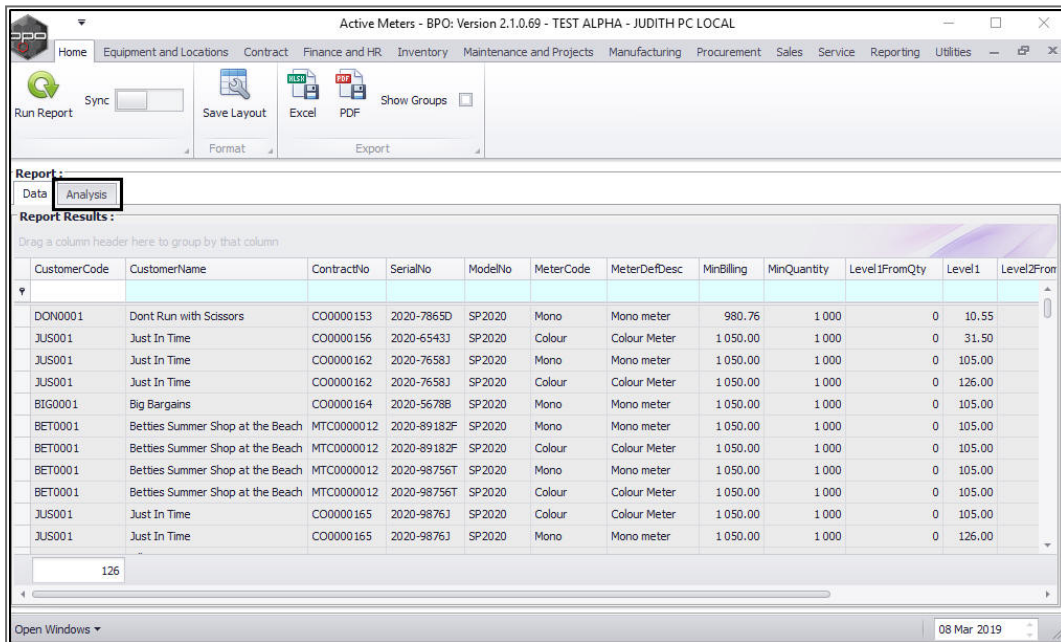
- The available report column headers will be displayed just below the *Analysis* tab.

- Decide which information (headers) you wish to use for the pivot chart.
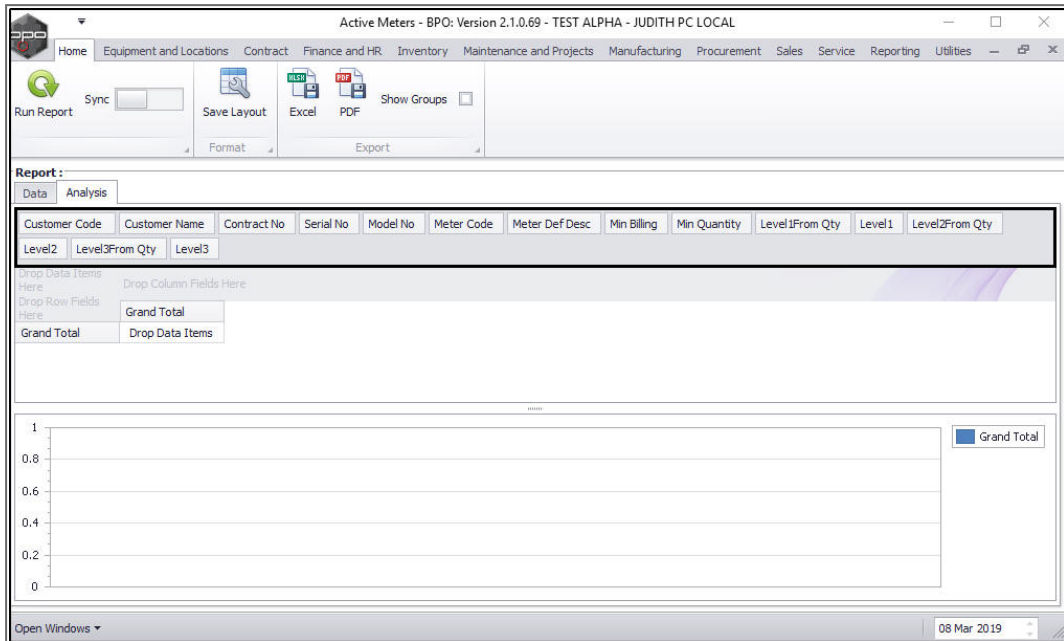
SELECTING COLUMNS FOR THE PIVOT CHART

The columns you wish to select for the Pivot Chart must be *dragged* and *dropped* into the relevant areas:

1. **Rows:** Drop selected column header(s) in the *Drop Row Fields Here* area.
2. **Columns**: Drop selected column header(s) in the *Drop Column Fields Here* area.
3. **Data Items**: Drop selected column header(s) in the *Drop Data Items Here* area.

   Note 1: It is *not* mandatory to drop columns in all 3 fields, for example you can drop columns in *Row* field and *Data* field but leave out the *Column* field.

> **Note** : You can drop **_multiple_** columns in a field for example, you can drop **_Serial No_** and **_Model No_** columns in the **_Row_** field.
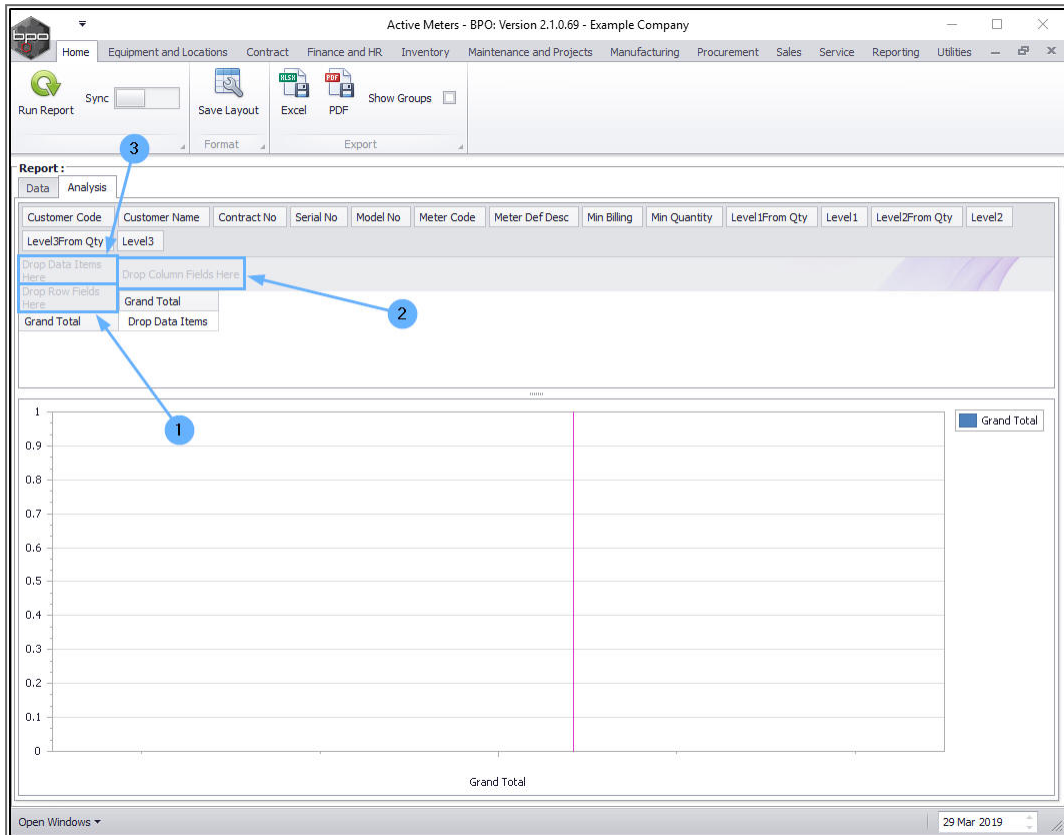
In this example,

1. **_Customer Name_** has been dropped in the **_Row_** field,
2. **_Level 1_** has been dropped in the **_Column_** field and
3. **_Min Billing_** has been dropped in the **_Data_** field.
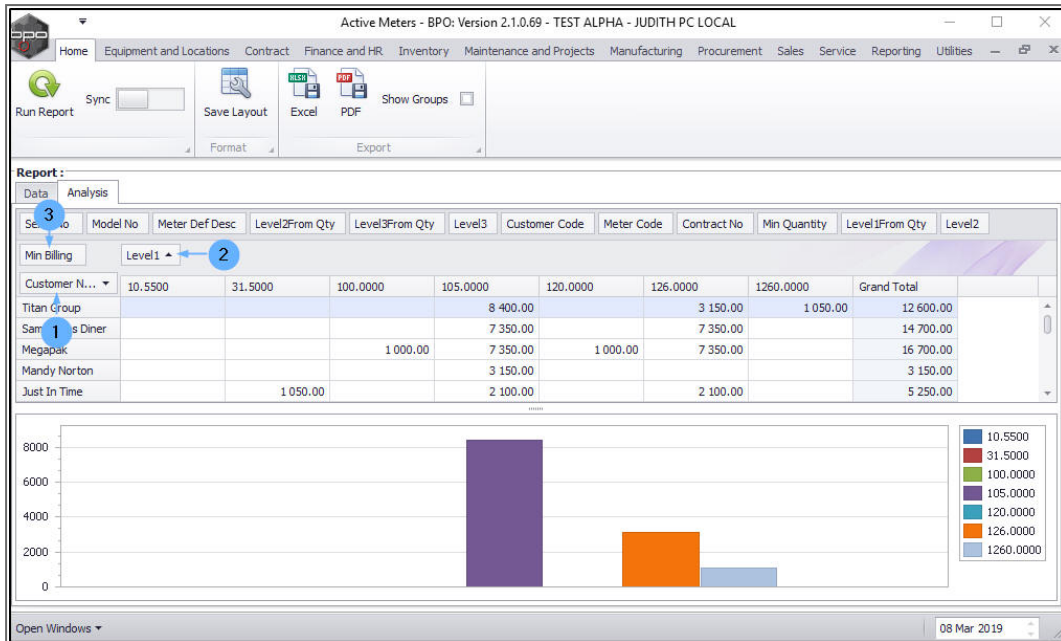
- You can pull a report *per column* by clicking on the column of your choice.
- In this image, *Grand Total* column has been selected and the report displayed is specific to the data in that column.
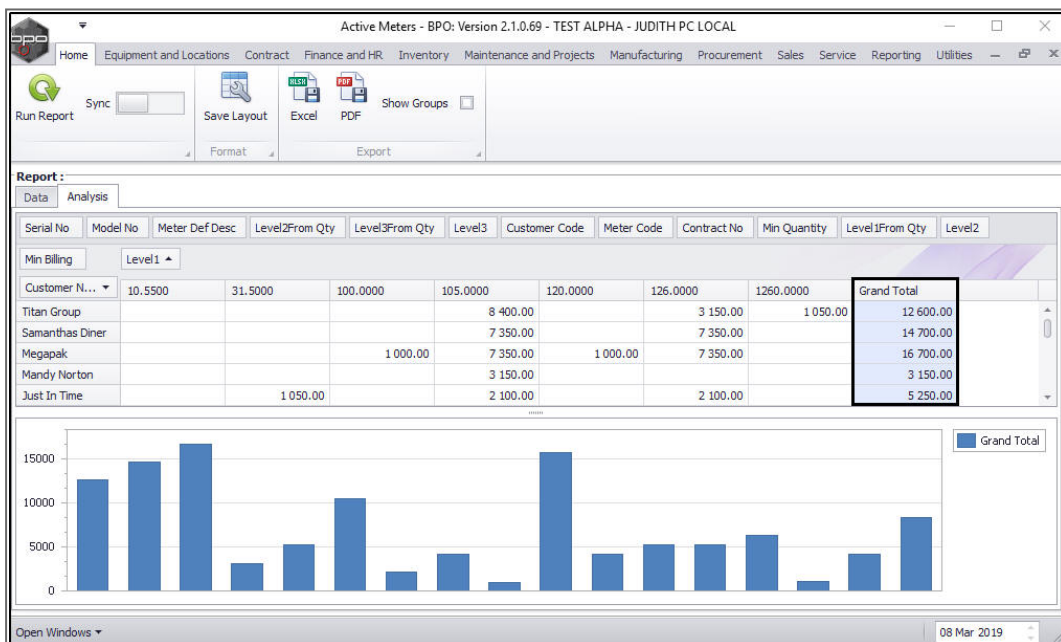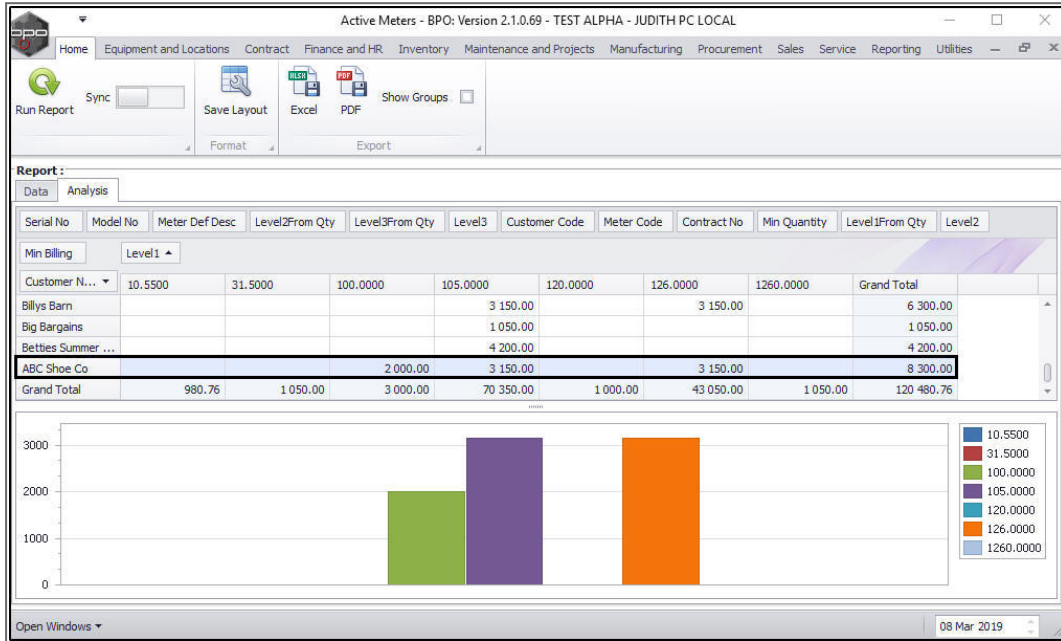
- You can also pull a report *per row* by clicking on the row of your choice.
- In this image, *ABC Show Co* row has been selected and the report displayed is specific to the data in that row.

> **Note**: You also export the pivot charts to Excel or to PDF.

RELATED TOPICS

- Introduction to All Reports
- Report View

CO3 Technologies (Pty) Ltd

©

Company Confidential

Status: ....

MNU.149.004

Software Version: ....

05 June, 2024

Date: ....

MNU.149.004