

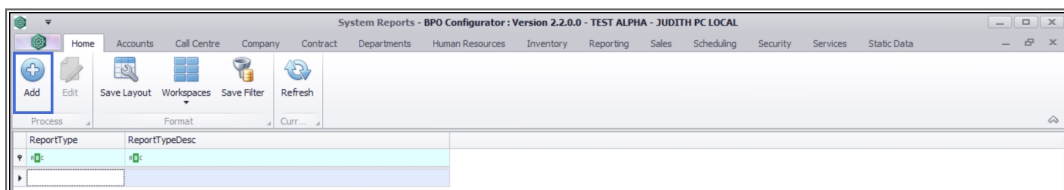
REPORTING

ADD A NEW REPORT

Ribbon Access: Configurator > Reporting > System Reports



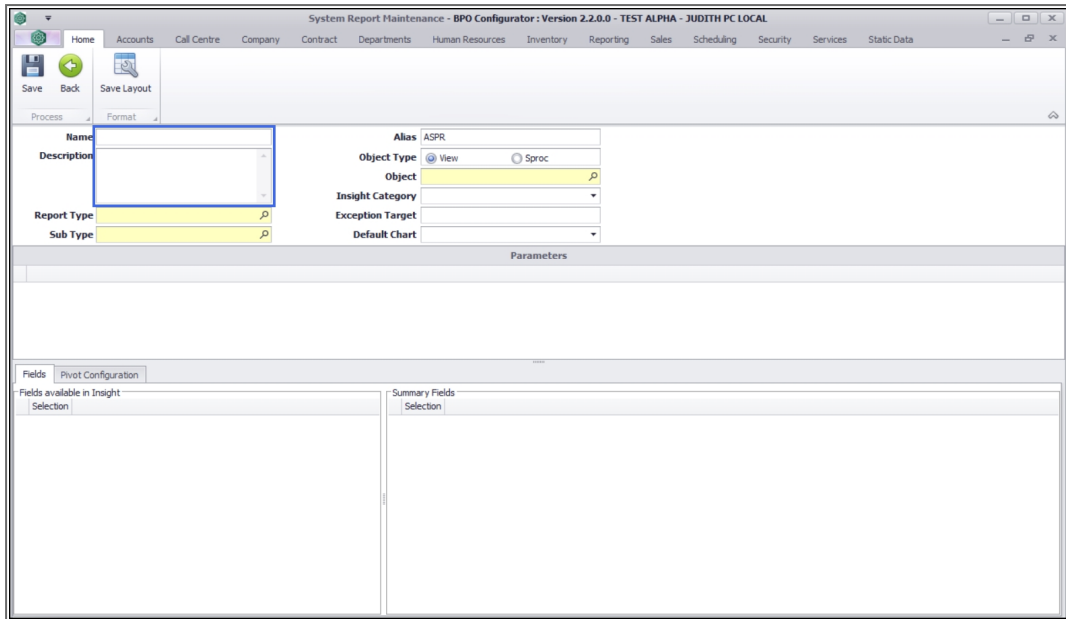
- The **System Reports** screen will be displayed.
- Click on **Add**.



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

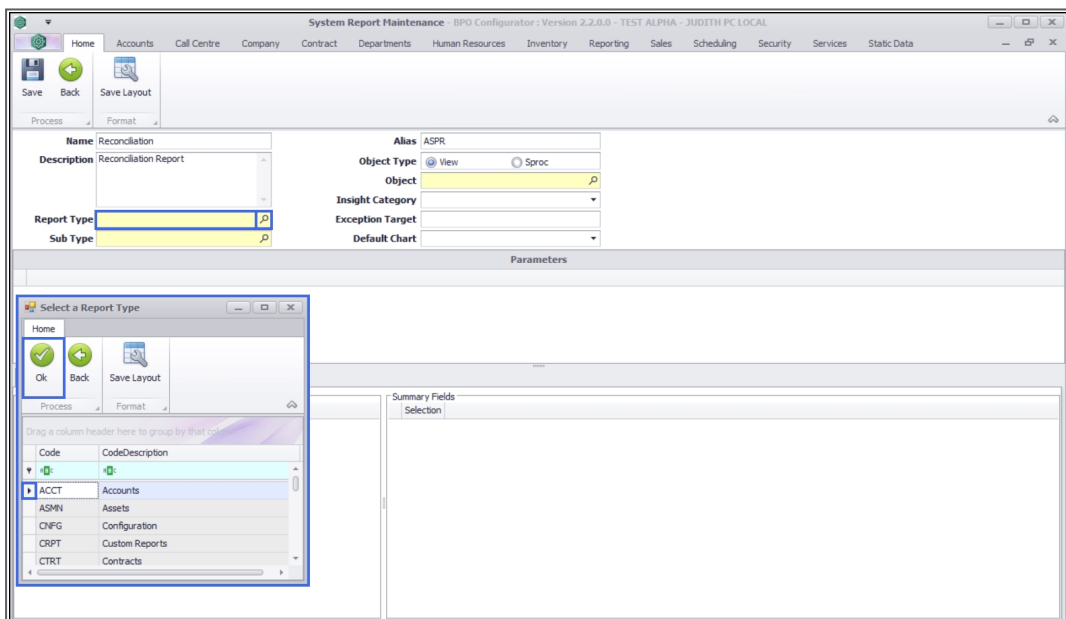
REPORT NAME AND DESCRIPTION

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



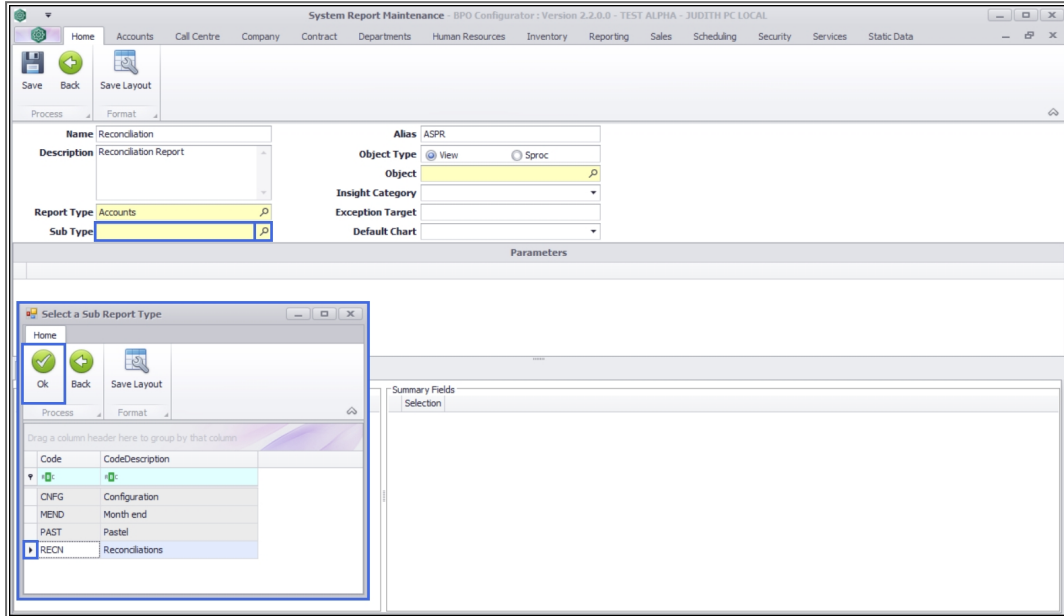
REPORT TYPE

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.

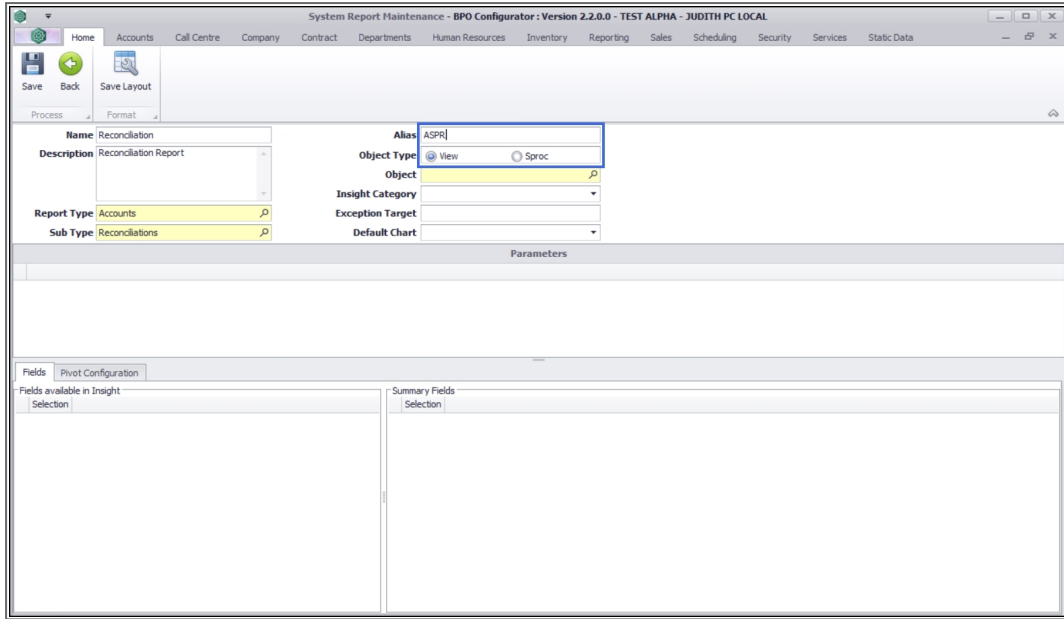


ALIAS

Alias: This will be populated by default.

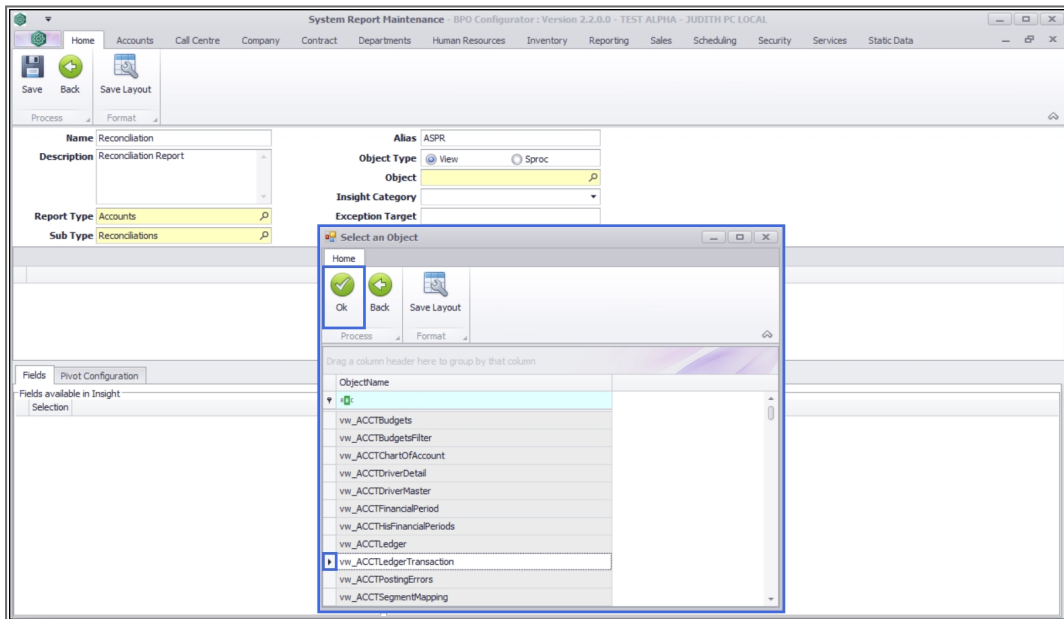
OBJECT TYPE

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



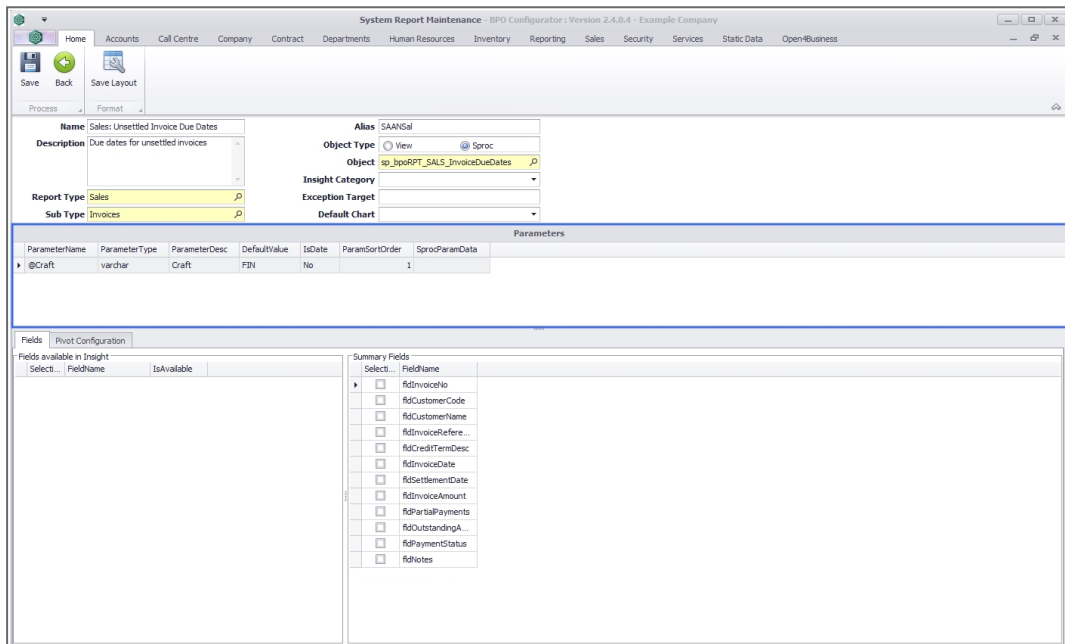
OBJECT

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' interface. The main configuration area includes:

- Name:** Sales: Unsettled Invoice Due Dates
- Description:** Due dates for unsettled invoices
- Alias:** SAANSal
- Object Type:** View (selected), Sproc
- Object:** sp_bpoRPT_SALS_InvoiceDueDates
- Insight Category:** (empty)
- Exception Target:** (empty)
- Default Chart:** (empty)
- Report Type:** Sales
- Sub Type:** Invoices

Below the configuration area is a 'Parameters' table:

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

At the bottom, there are sections for 'Fields' and 'Summary Fields' with checkboxes for selecting fields like RdlInvoiceNo, RdlCustomerCode, etc.

PARAMETER INPUT VALUES

Version Compatibility¹

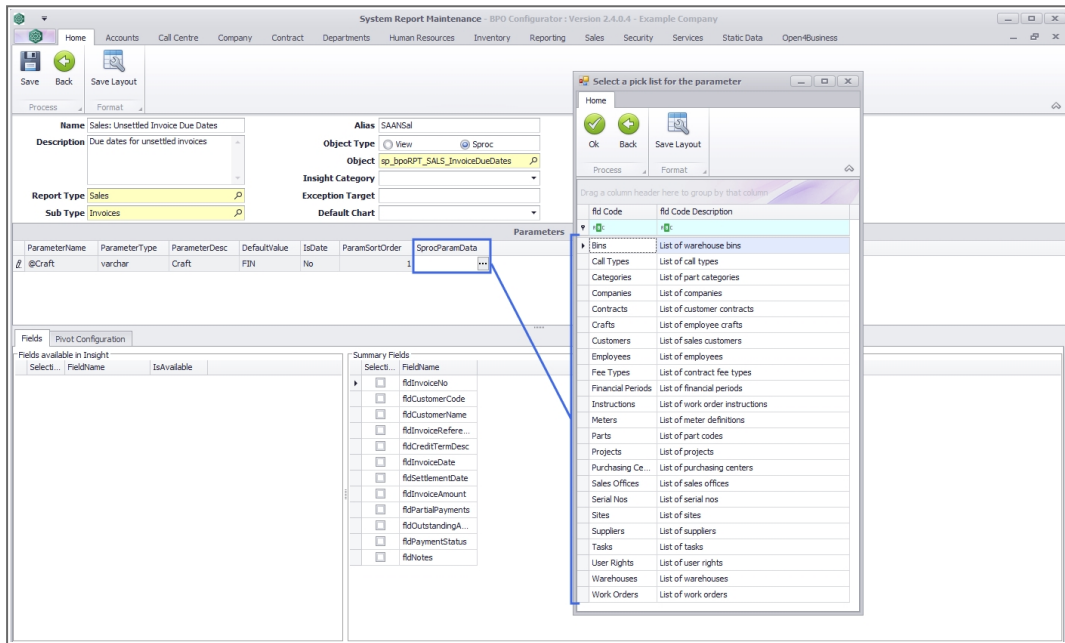
- You can select parameter input values from a drop-down list where a pick list has been defined for all parameters except for

¹ BPO2 v2.5.0.8 or higher

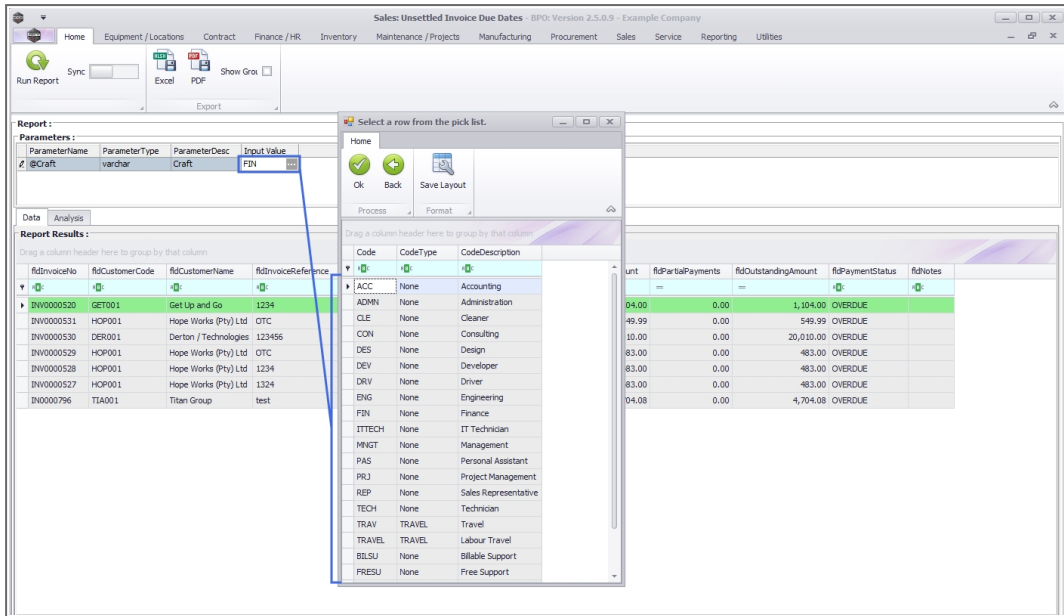
Dates. Input values can still be manually typed, but these will now be validated against records generated in the pick list.

- 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.

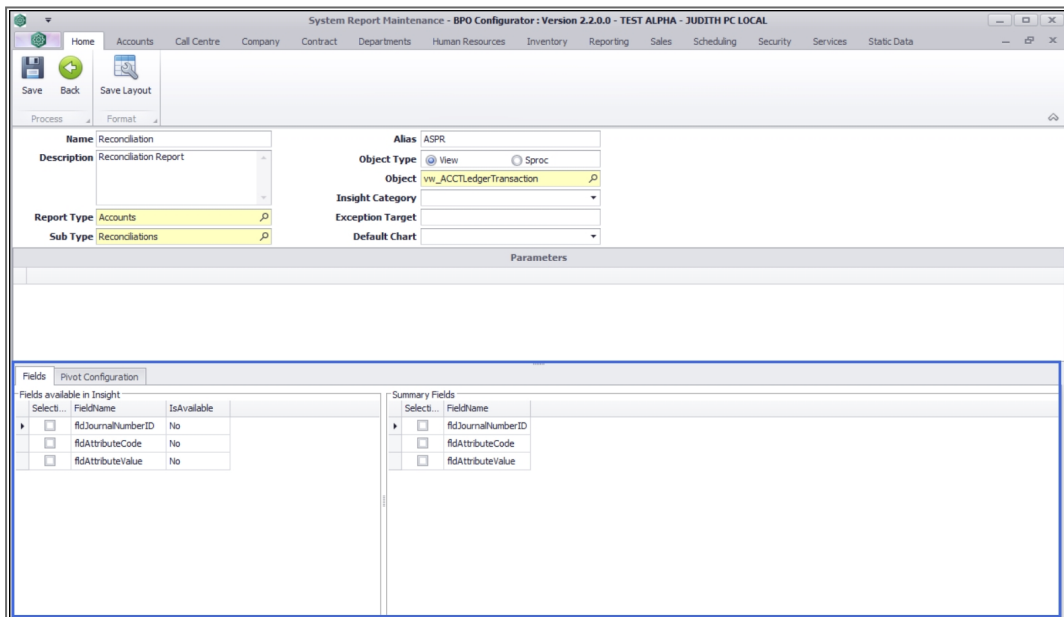


Now when pulling the report in BPO, a list of crafts as configured in the system will appear in a selection list.



FIELDS AND PIVOT CONFIGURATION

- The **Fields** and **Pivot Configuration** tabs will become auto populated with data.



INSIGHT CATEGORY

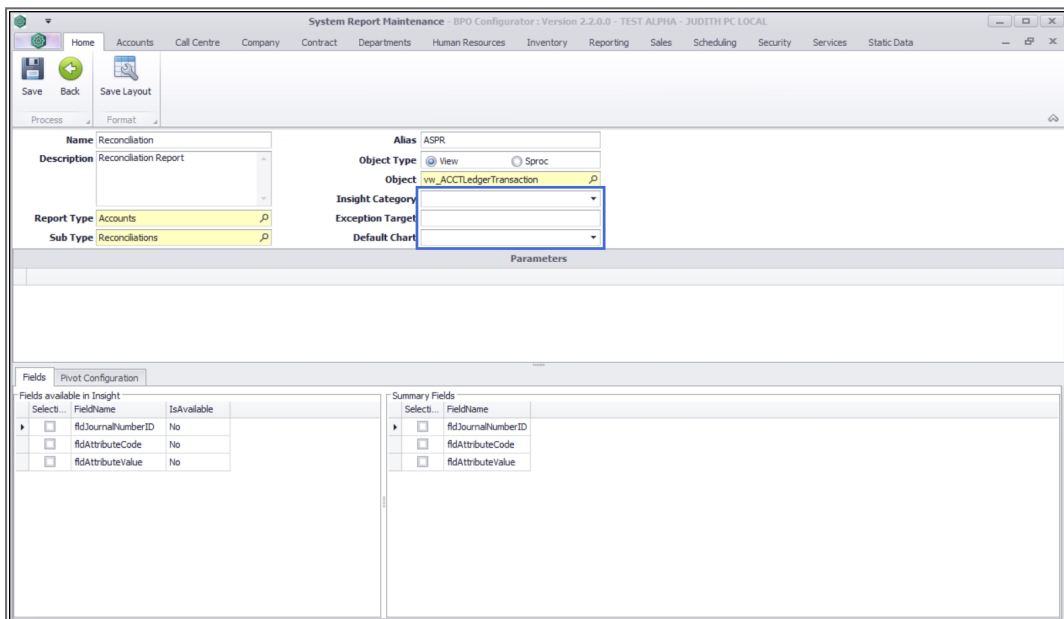
Click on the down arrow and select the required option.

EXCEPTION TARGET

Type in the Exception Target if required.

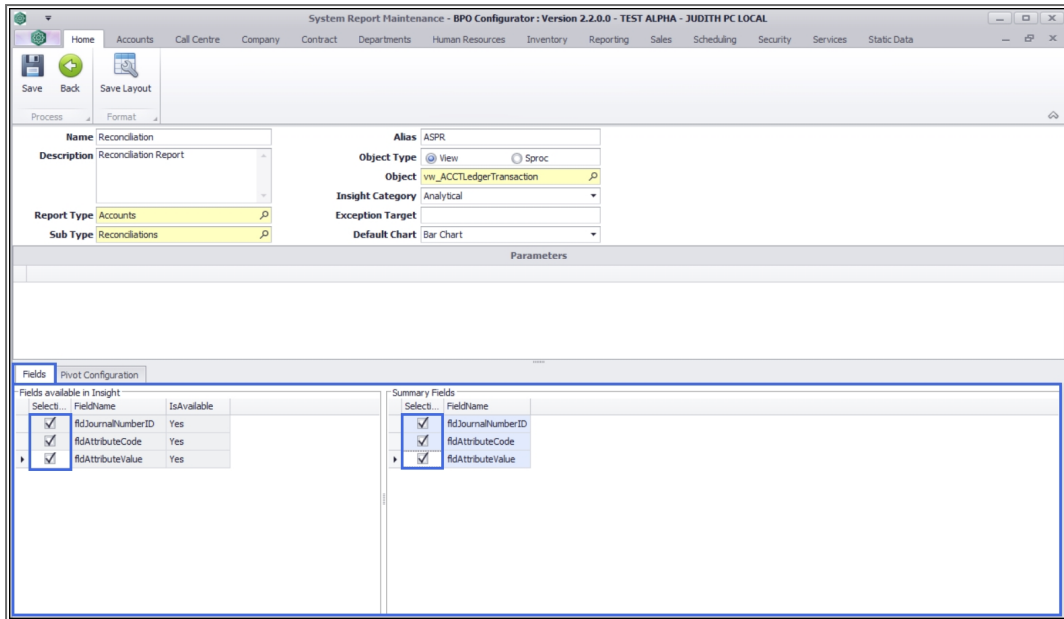
DEFAULT CHART

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



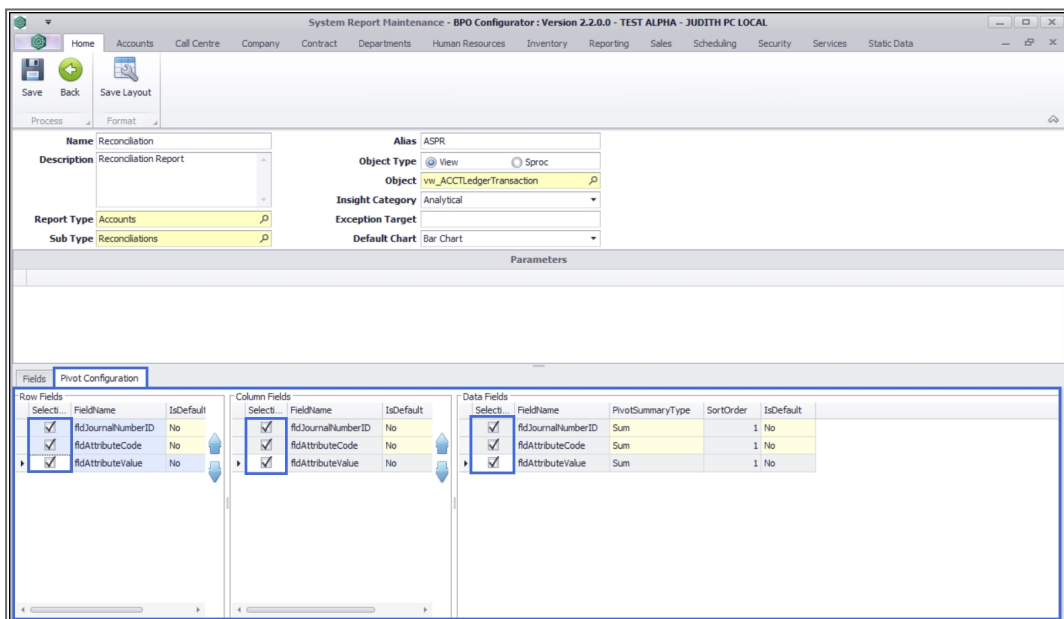
FIELDS

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



PIVOT CONFIGURATION

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



- 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			Column Fields			Data Fields				
Select...	FieldName	IsDefault	Select...	FieldName	IsDefault	Select...	FieldName	PivotSummaryType	SortOrder	IsDefault
<input checked="" type="checkbox"/>	fdJournalNumberID	No	<input checked="" type="checkbox"/>	fdJournalNumberID	No	<input checked="" type="checkbox"/>	fdJournalNumberID	Sum	1	No
<input checked="" type="checkbox"/>	fdAttributeCode	No	<input checked="" type="checkbox"/>	fdAttributeCode	No	<input checked="" type="checkbox"/>	fdAttributeCode	Sum	1	No
<input checked="" type="checkbox"/>	fdAttributeValue	No	<input checked="" type="checkbox"/>	fdAttributeValue	No	<input checked="" type="checkbox"/>	fdAttributeValue	Sum	1	No

SAVE REPORT

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

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Select...	FieldName	IsDefault	Select...	FieldName	IsDefault	Select...	FieldName	PivotSummaryType	SortOrder	IsDefault
<input checked="" type="checkbox"/>	fdJournalNumberID	No	<input checked="" type="checkbox"/>	fdJournalNumberID	No	<input checked="" type="checkbox"/>	fdJournalNumberID	Sum	1	No
<input checked="" type="checkbox"/>	fdAttributeCode	No	<input checked="" type="checkbox"/>	fdAttributeCode	No	<input checked="" type="checkbox"/>	fdAttributeCode	Sum	1	No
<input checked="" type="checkbox"/>	fdAttributeValue	No	<input checked="" type="checkbox"/>	fdAttributeValue	No	<input checked="" type="checkbox"/>	fdAttributeValue	Sum	1	No

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