

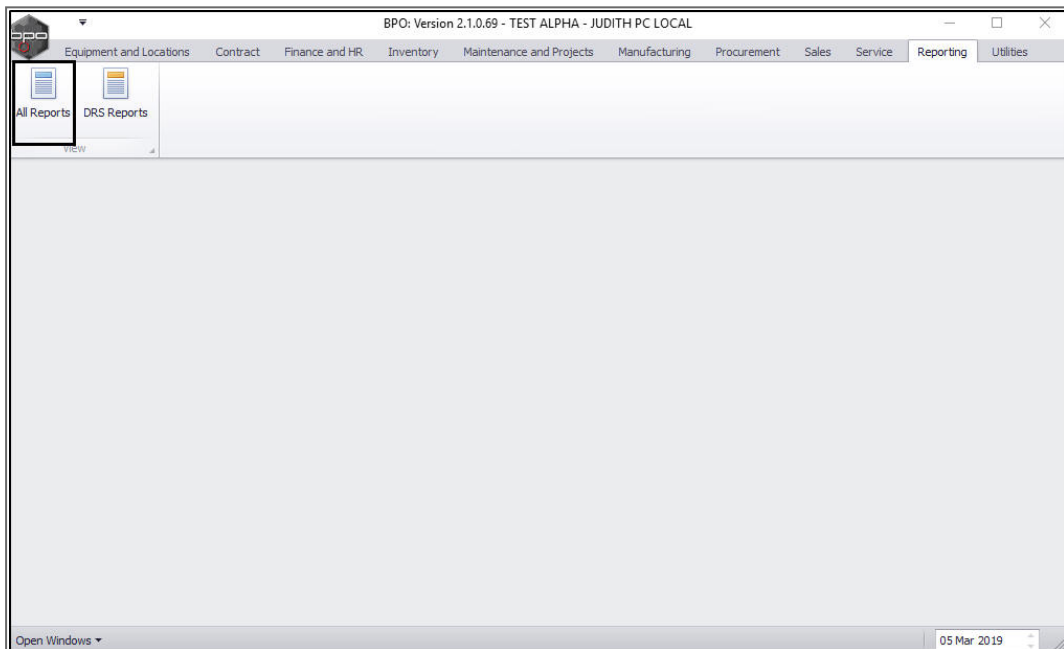
We are currently updating our site; thank you for your patience.

REPORTING

ALL REPORTS – CUSTOMISE REPORTS

A user can **customise** a report to suit preference and several methods can be used to achieve this as set out below.

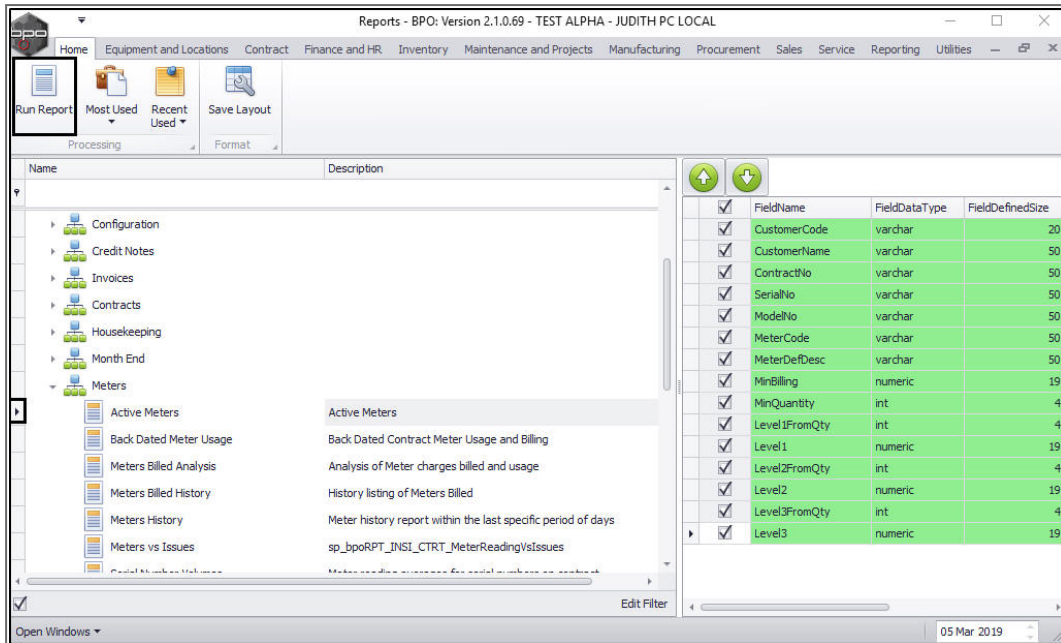
Ribbon Select **Reporting > All Reports**



The **Reports** screen will be displayed.

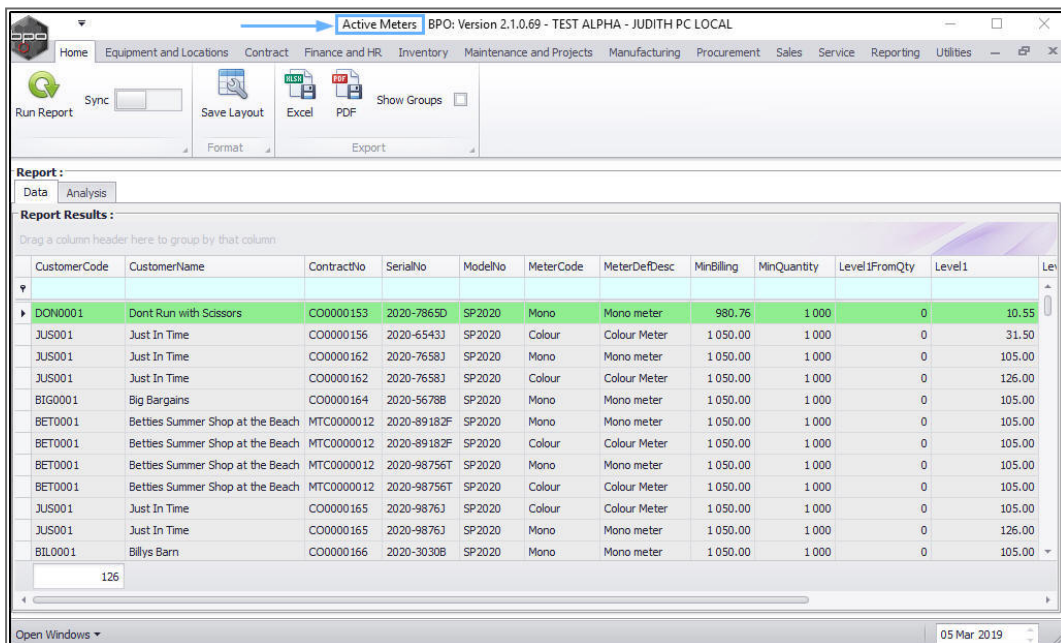
SELECT REPORT

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



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

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

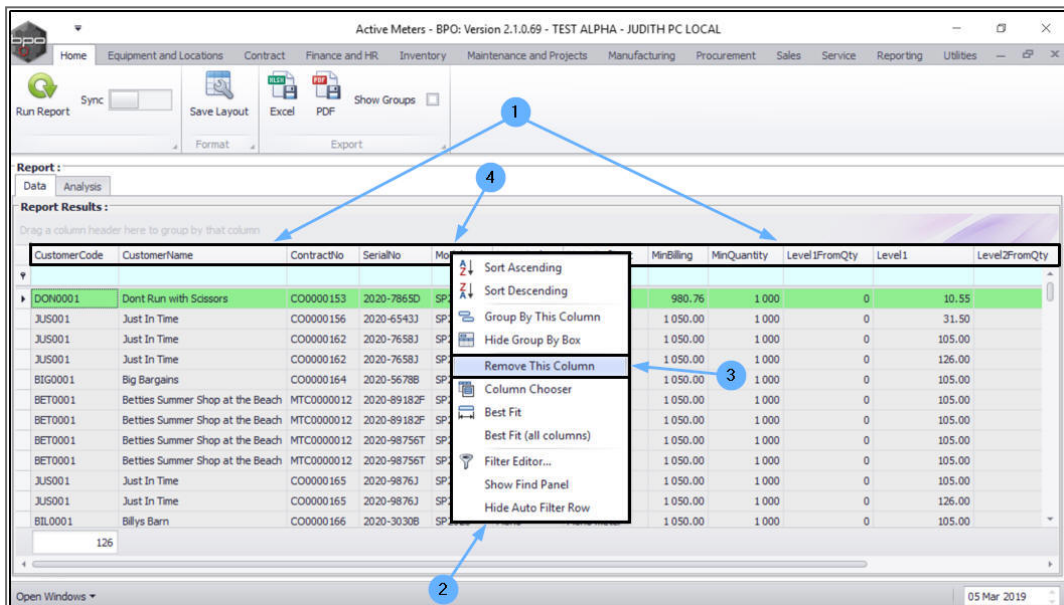


REMOVING/ADDING COLUMNS

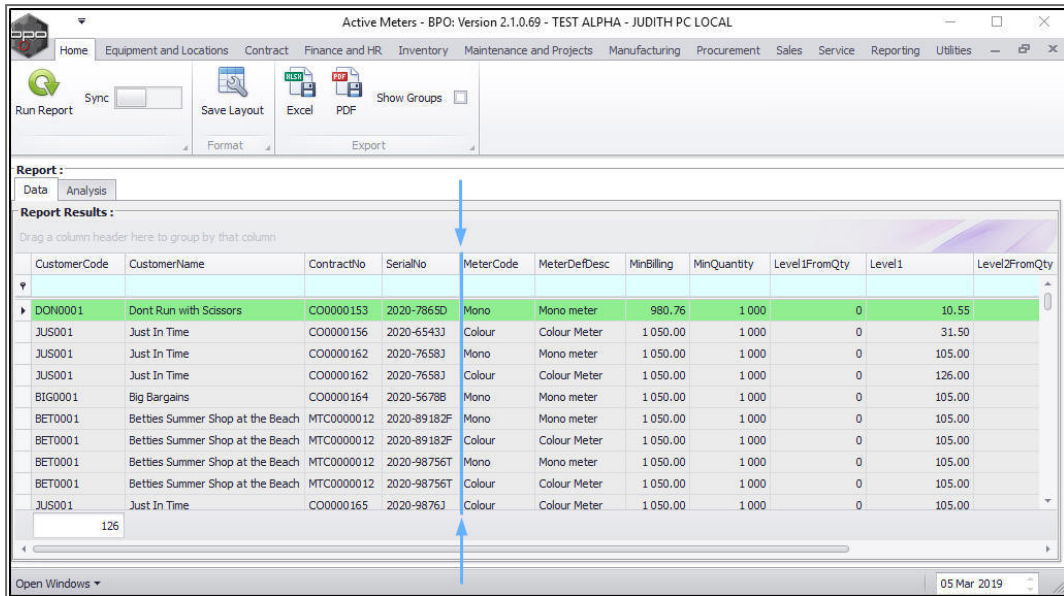
There are **2** methods of removing columns:

Method 1:

1. **Right click** in any column header.
2. The **drop-down** menu will be displayed.
3. Click on **Remove This Column** option.
4. In this example, the **Model No** column has been selected (it is positioned between the Serial No and Meter Code columns).



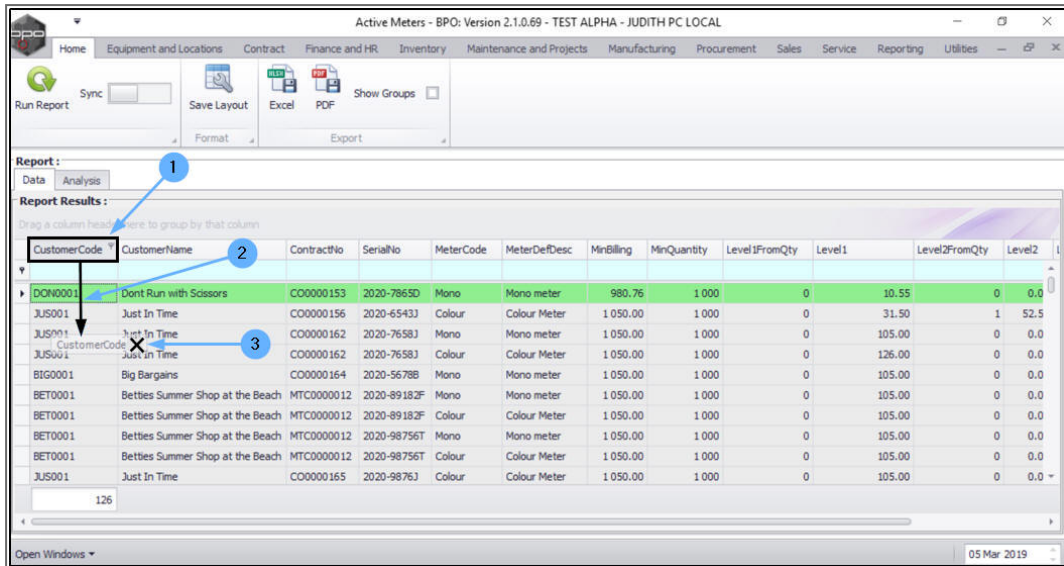
- The selected column, in this example **Model No** will now be **removed**.



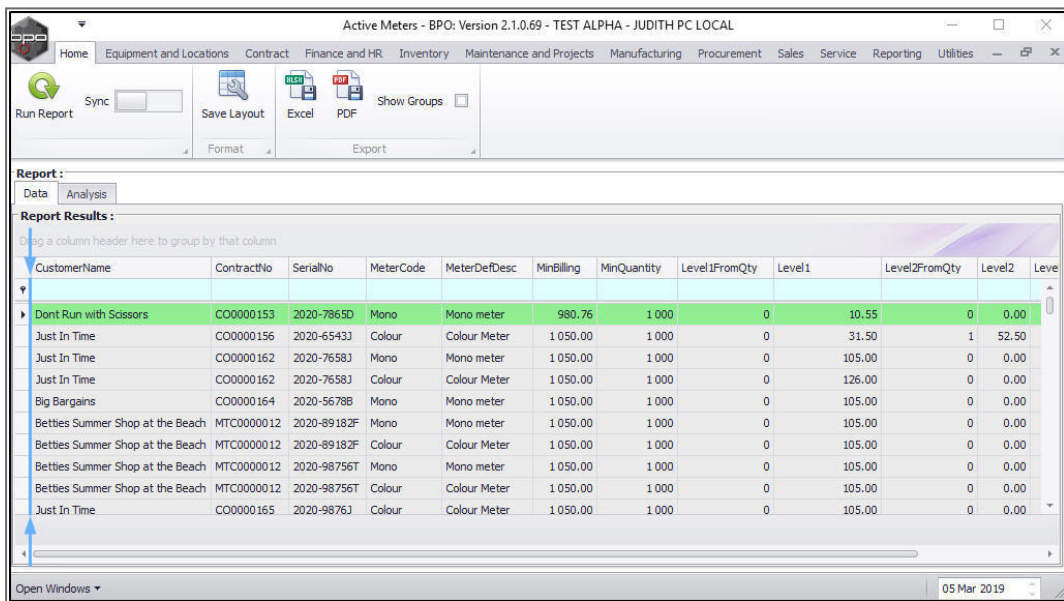
Method 2:

1. **Click on** the selected column header.
 - In this example, the **Customer Code** column has been selected.
2. **Drag** the column header downwards away from the column header row.
3. A black cross [**X**] will appear.

Now **drop** the column header.



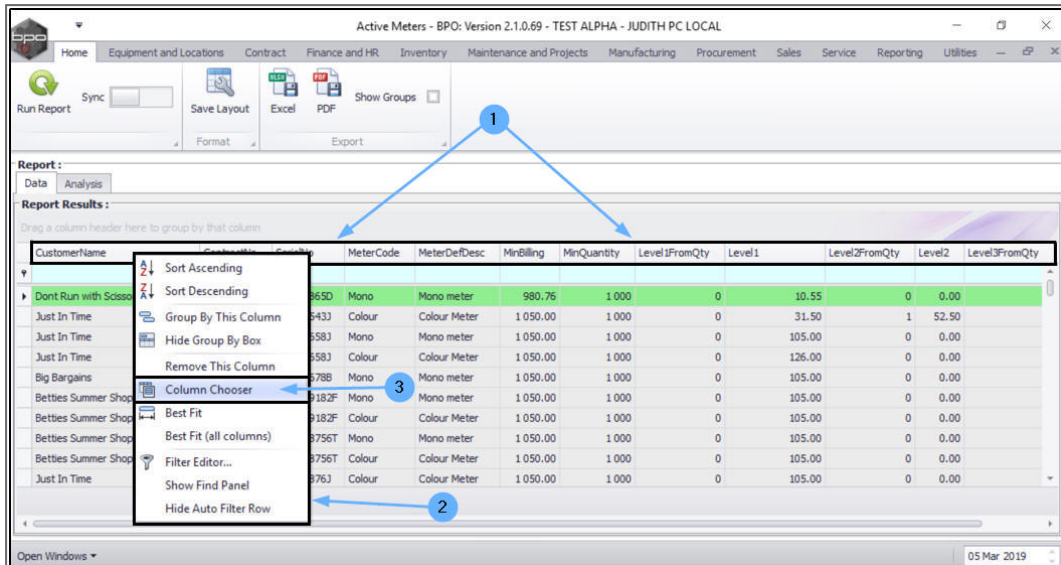
- The selected column, in this example, **Customer Code** will now be removed.



RECOVERING/ADDING COLUMNS

1. **Right click** in any column header.
2. The **drop-down** menu will be displayed.

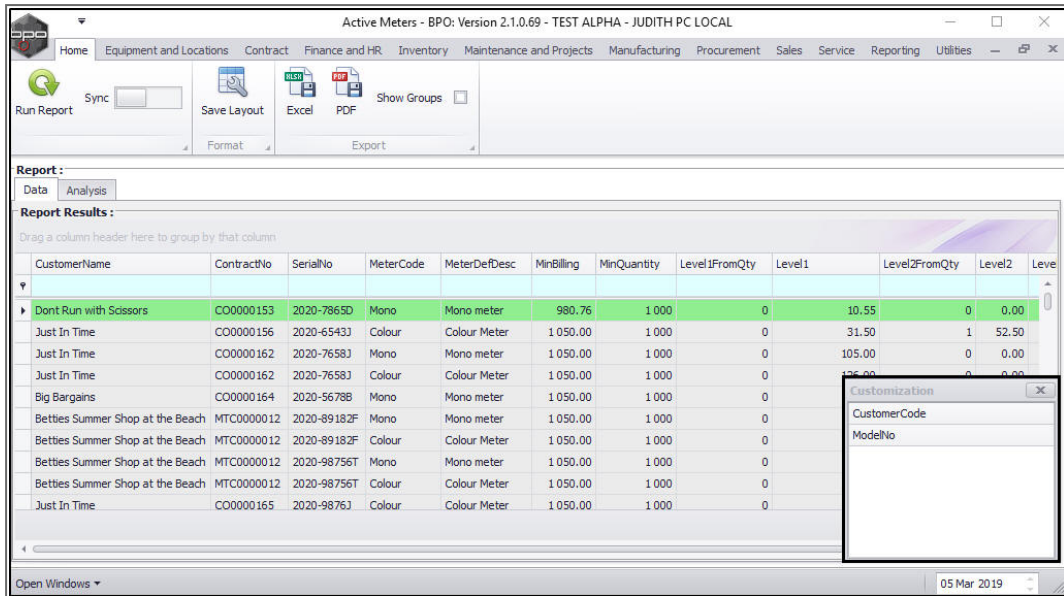
3. Click on **Column Chooser**.



CUSTOMIZATION MENU

- A **Customization** pop up menu will appear in the bottom right hand side of the screen.
- This contains an alphabetical list of all the columns that you can add to your current data grid.

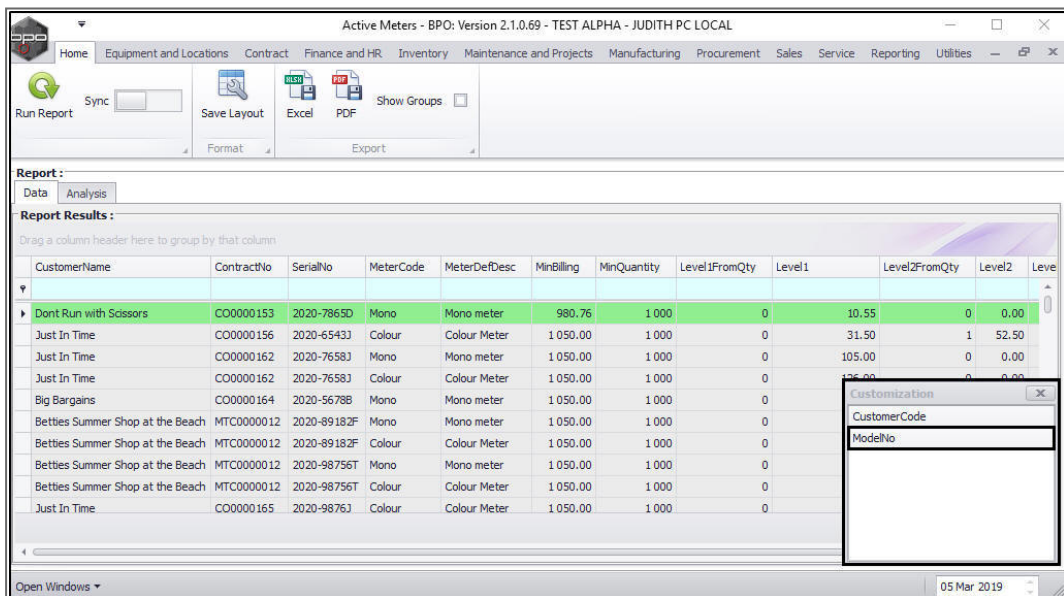
Note: If all the columns are **already** added to your data grid, then there will be nothing listed here.



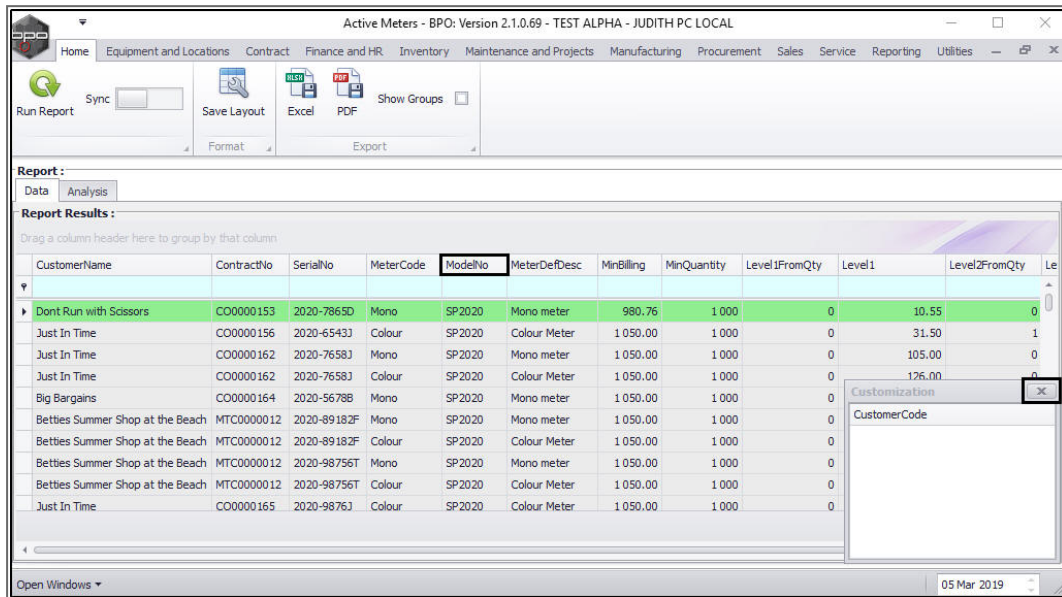
Either,

Method 1:

- In the **Customization** menu, **double click** on the **column header** that you wish to add to your data grid.
- In this image, **Model No** is selected.



- The selected column, in this example, **Model No** will now be displayed in the data grid.
- **Close** the **Customization** menu when you are done.

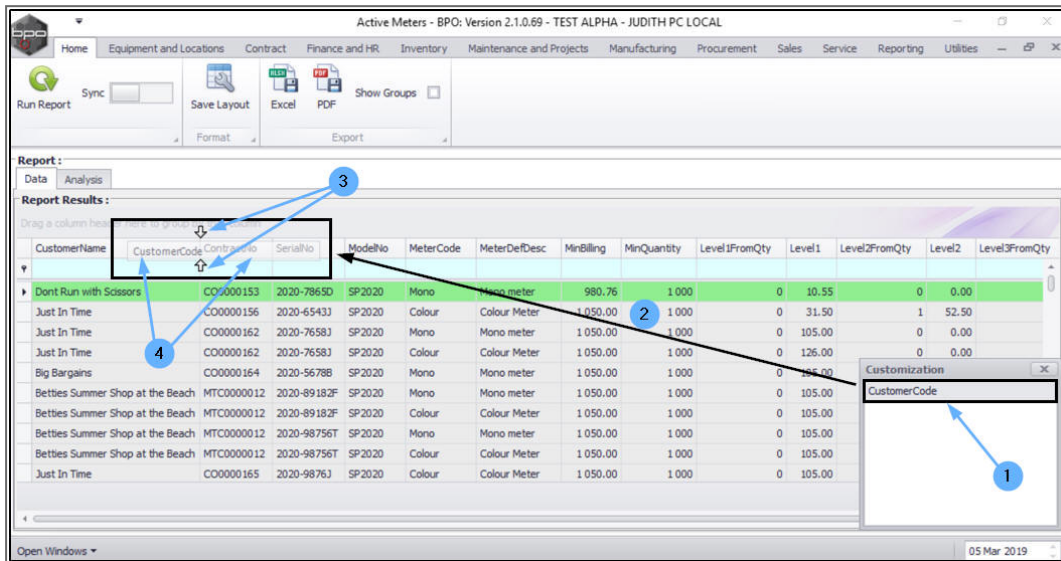


Or,

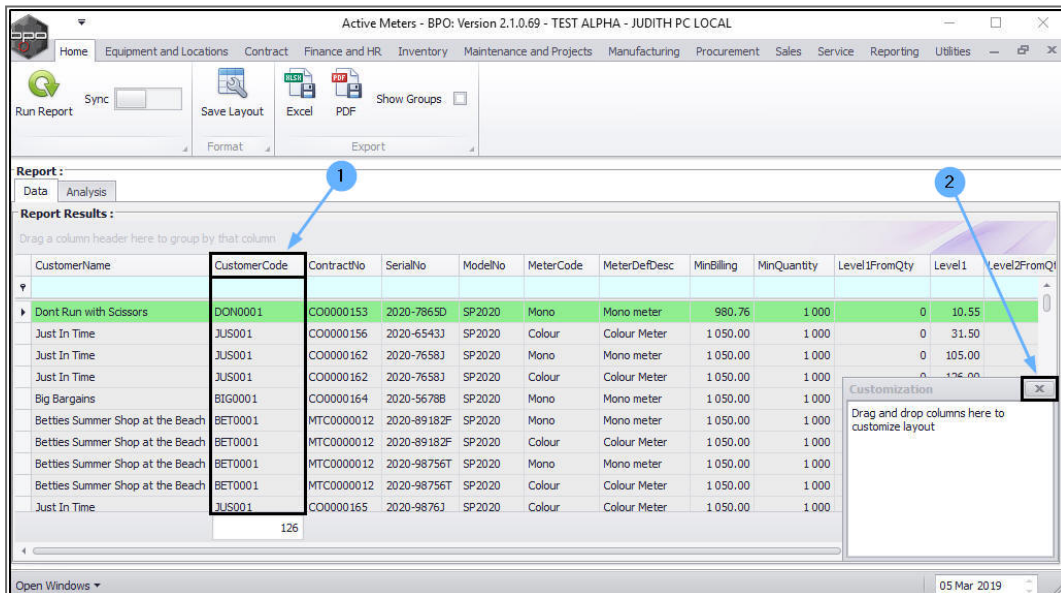
Method 2:

1. In the **Customization** menu, click on the **column header** that you wish to add to the data grid.
 - In this example, **Customer Code** has been selected.
2. **Drag** the column to the column header **row**.
3. You can drop this header anywhere in the column header row, in between any columns or at the beginning or end of the column header row according to your preference. **2 white arrows** will appear to show you where the column will be added. Keep dragging the selected column along this header row until the arrows point to the required place.

- In this example, the arrows are indicating that the selected Customer Code column will be dropped between the **Customer Name** and **Contract No** columns.



- The selected column, **Customer Code** will now be displayed in the data grid.
- Close the **Customization** menu when you are done.



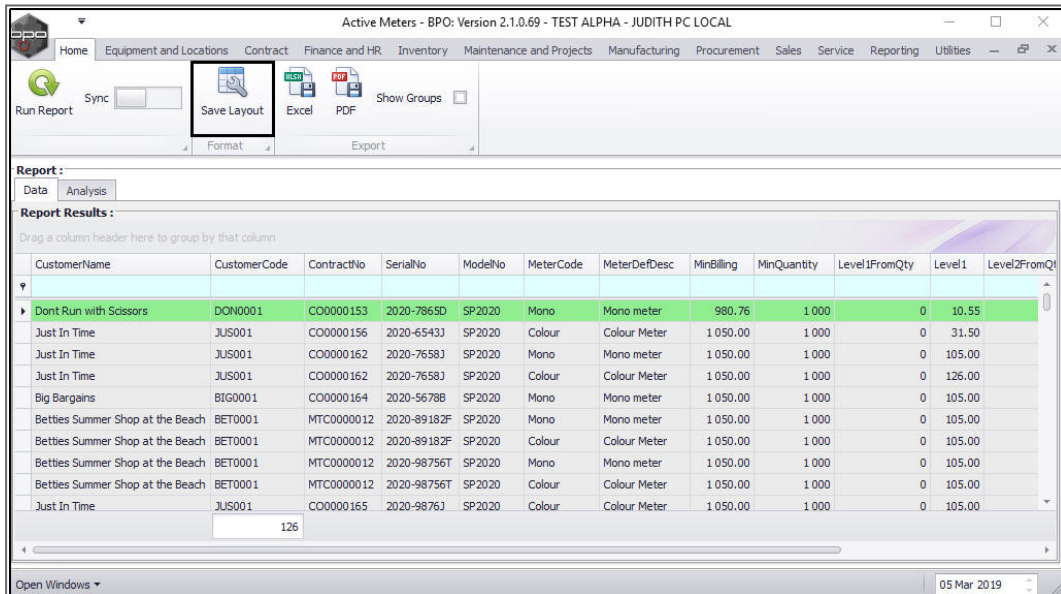
ADDITIONAL DATA GRID INFORMATION

For more information on the editing and organisation of data grids, navigate to the following manuals:

- [Using BPO Data Grids](#)
- [Using BPO Controls and Functions](#)
- [Using BPO2 Working Environment](#)

SAVE LAYOUT

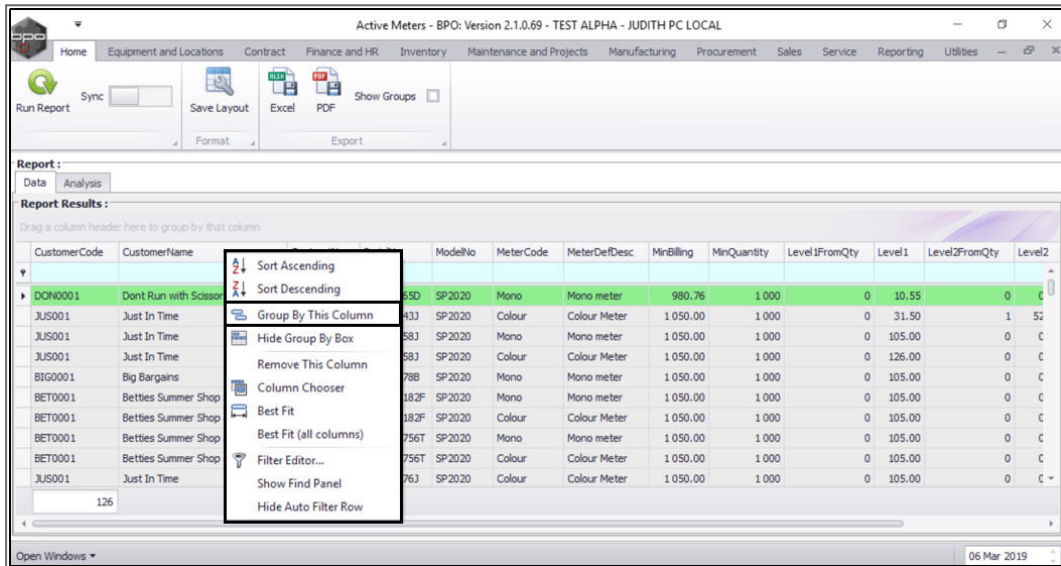
1. If you wish to keep the changes made to the data grid, you must click on **Save Layout**.
 - If you do not use this functionality, the changes will be undone as soon as you close the screen.
 - These changes are saved **per user**.
2. **Close** the screen when you are done.



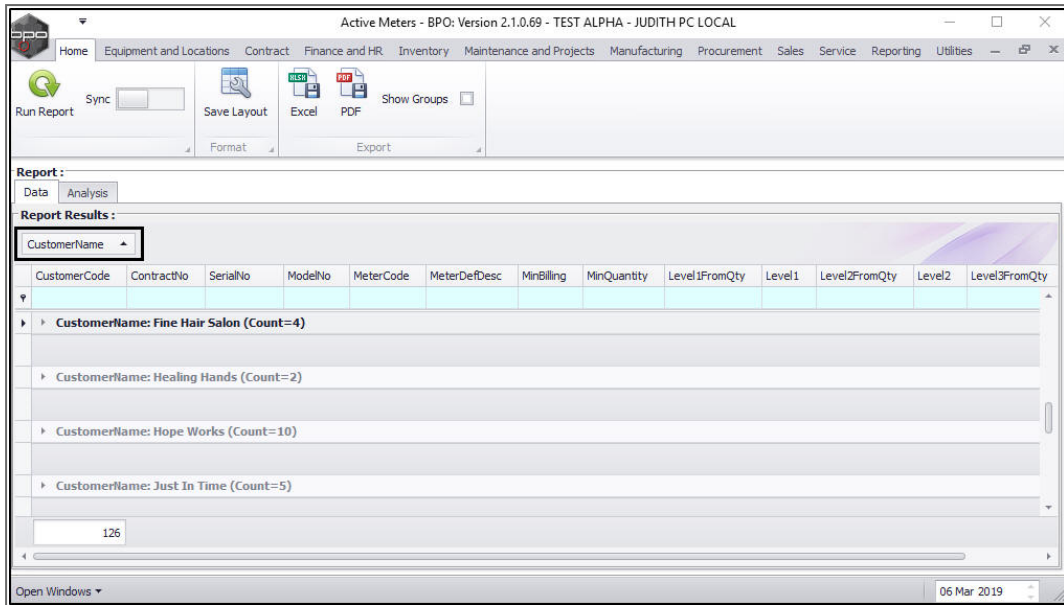
GROUP DATA BY COLUMN

Method 1:

- In the column header of your choice, **right click** to display the **drop-down menu**, then click on the **Group By This Column** option.
- In this example, items will be grouped by **Customer Name**.

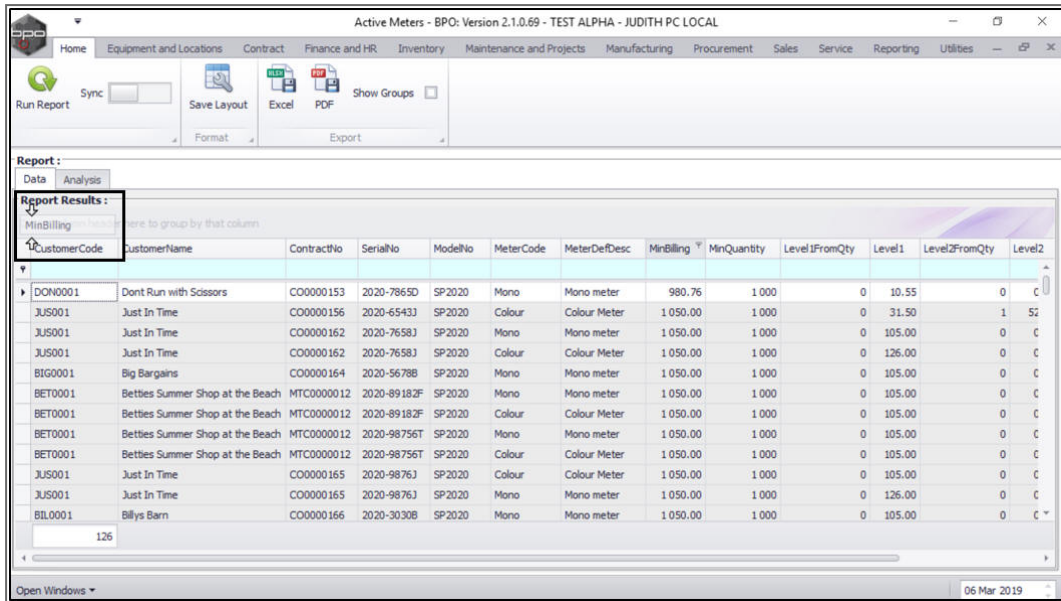


- The data grid will now display the results of your **Group By This Column** choice.
- The **Group By** box above the column will now display which column has been sorted.

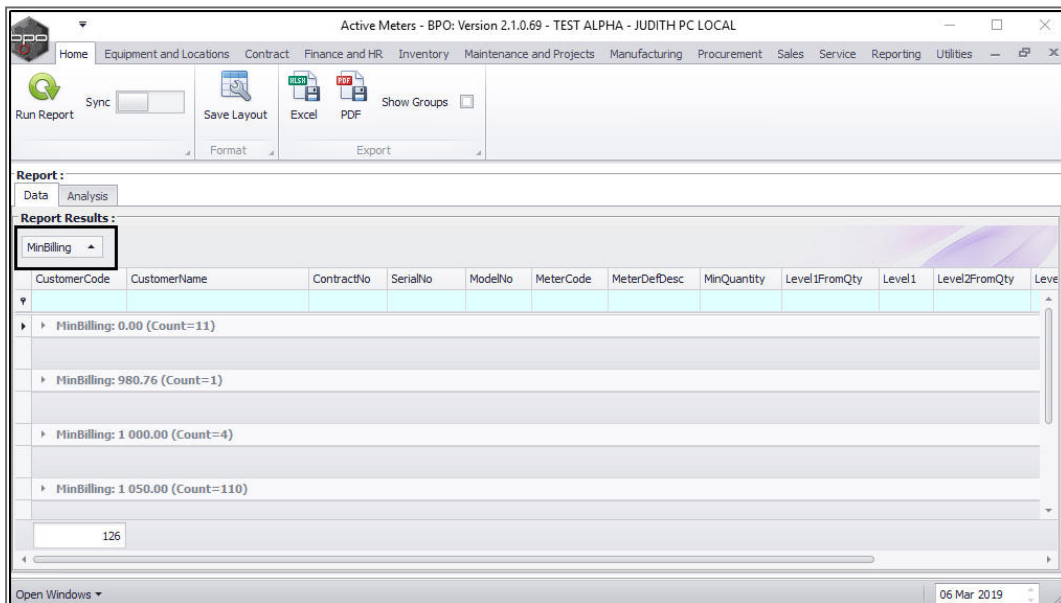


Method 2:

- **Click** and **hold** on the column header of your choice.
 - In this example, **Min Billing** has been selected.
- **Drag** the selected header **up** and **away** from the **original** column header position.
- As you do this, **two white arrows** will appear directing you to the **Group By** box.
- **Drop** the column header in this box.



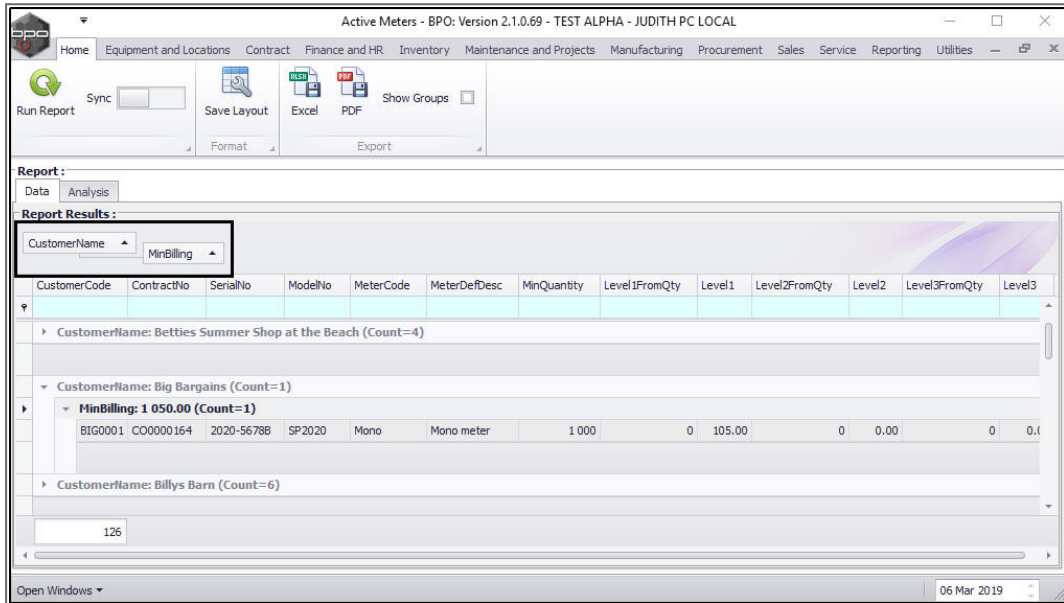
- The data grid will now display the results of your column sort.
- The **Group By** box above the columns will now display which column has been sorted.
 - in this example, **Min Billing**.



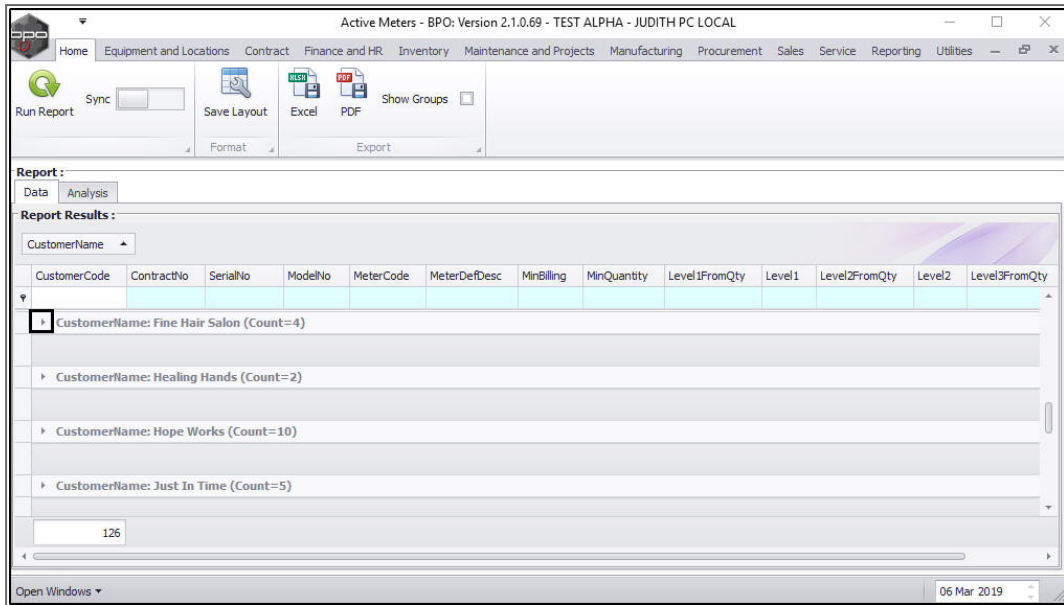
CREATE A SUB GROUP

You can also create a sub-group.

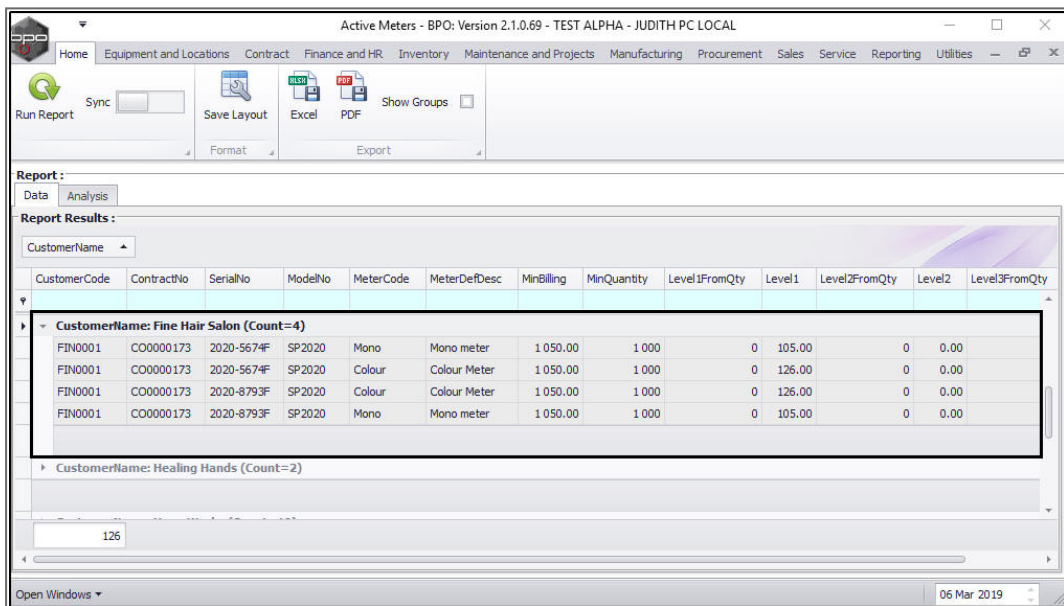
- In this example, first the **Customer Name** column was grouped, using **Method 2** then the **Min Billing** columns was sub-grouped, also using **Method 2**.



- To view the details for any grouping, click on the **arrow** in the selected row.

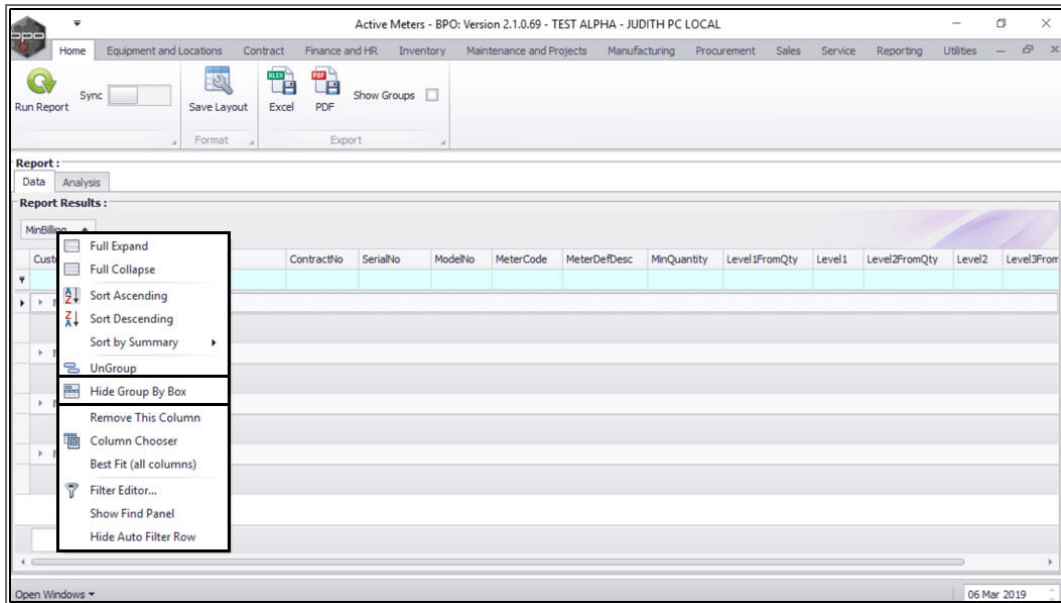


- You can now view the details of the grouping.

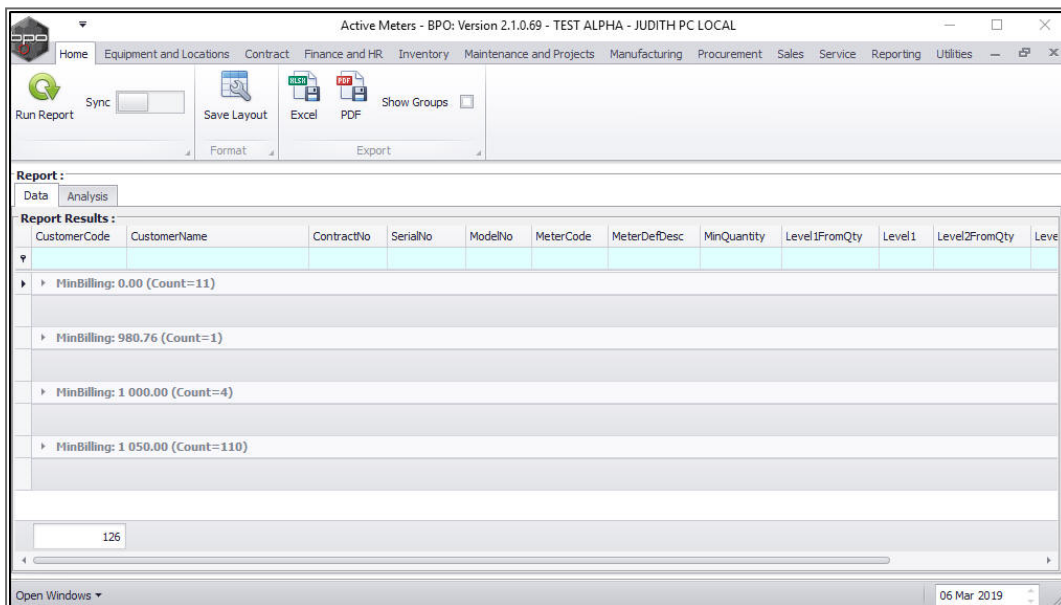


HIDE 'GROUP BY' BOX

- **Right click** in any column header to display the **drop-down menu**, then click on the **Hide Group By Box** option.



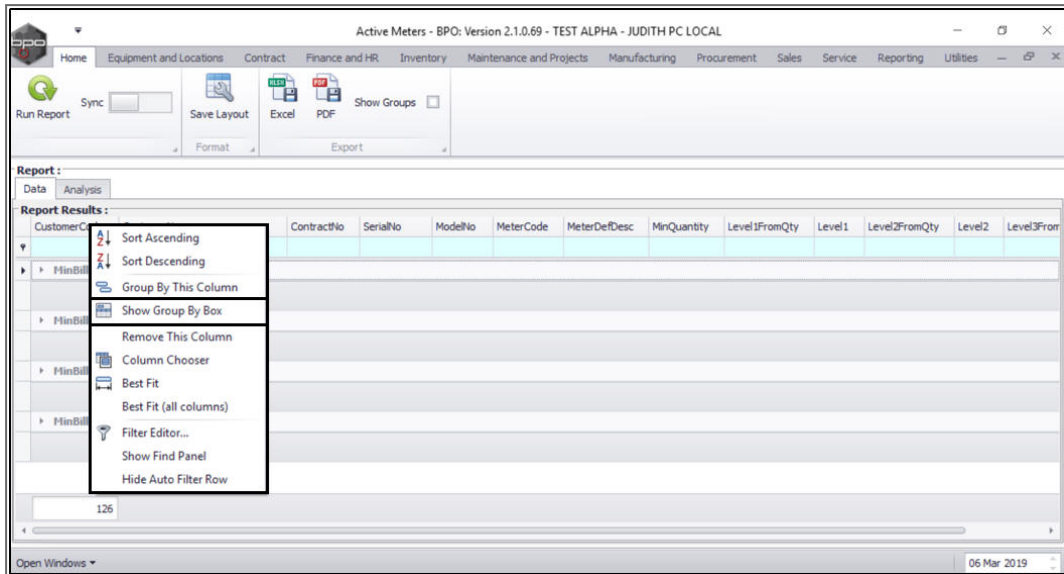
- The **Group By** box which is usually above the column header row is now hidden.



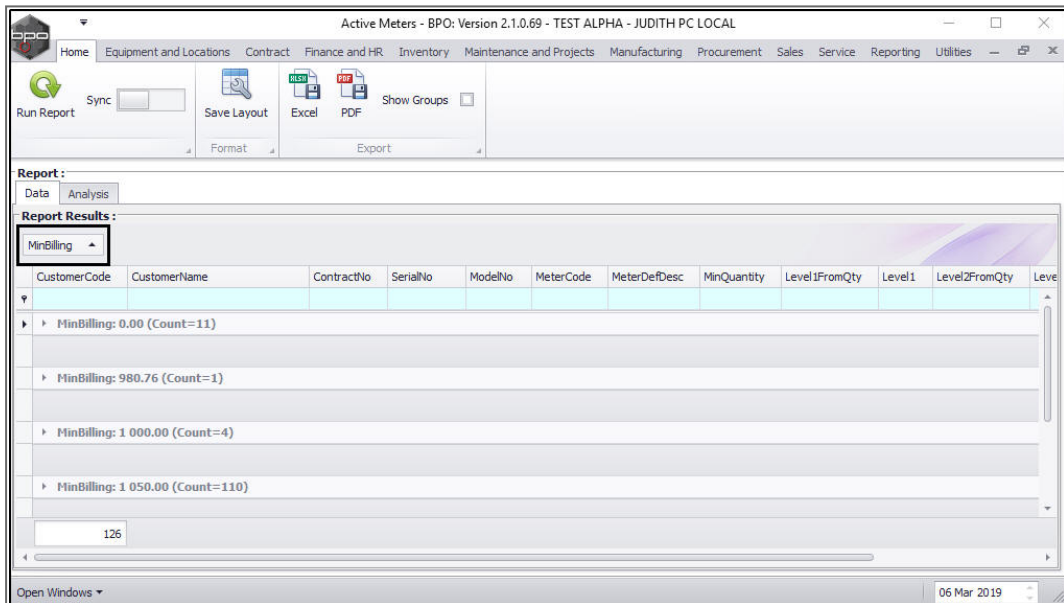
UN-HIDE 'GROUP BY' BOX

- **Right click** in any column header to display the **drop-down menu**. Then click on the **Show Group By Box** option to display the

Group By box again.



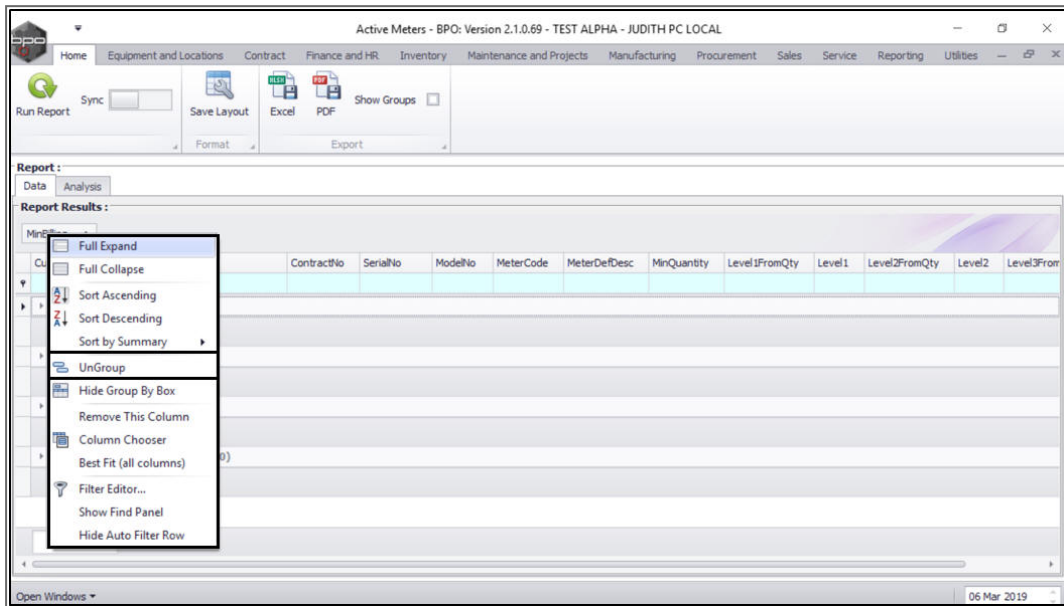
- You can now view the **Group By** box.



UNGROUP DATA

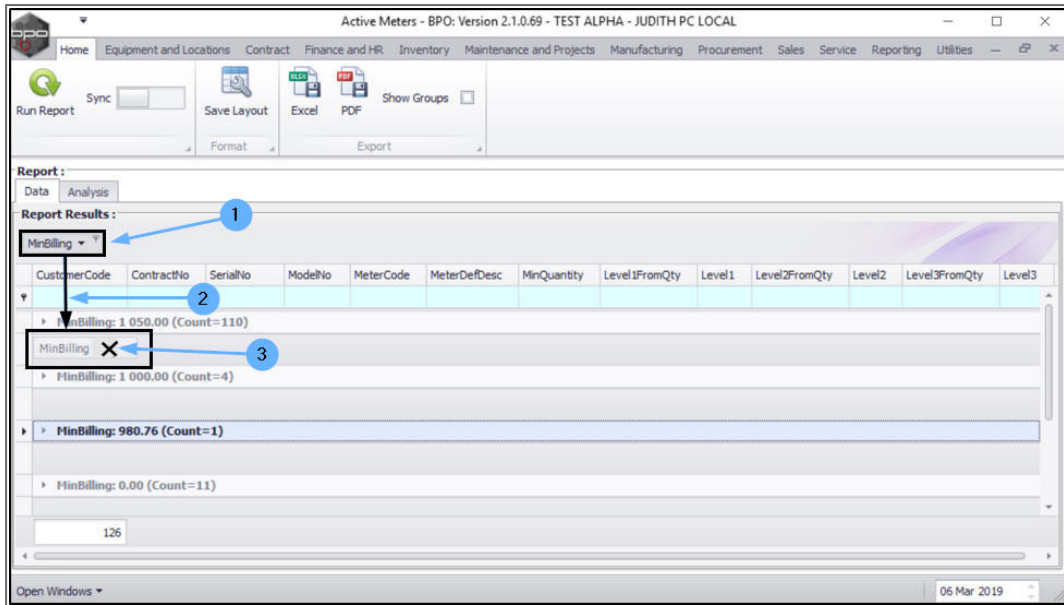
Either,

- **Right click** on the **Group By** box to display the drop-down menu.
- Click on **Ungroup**.



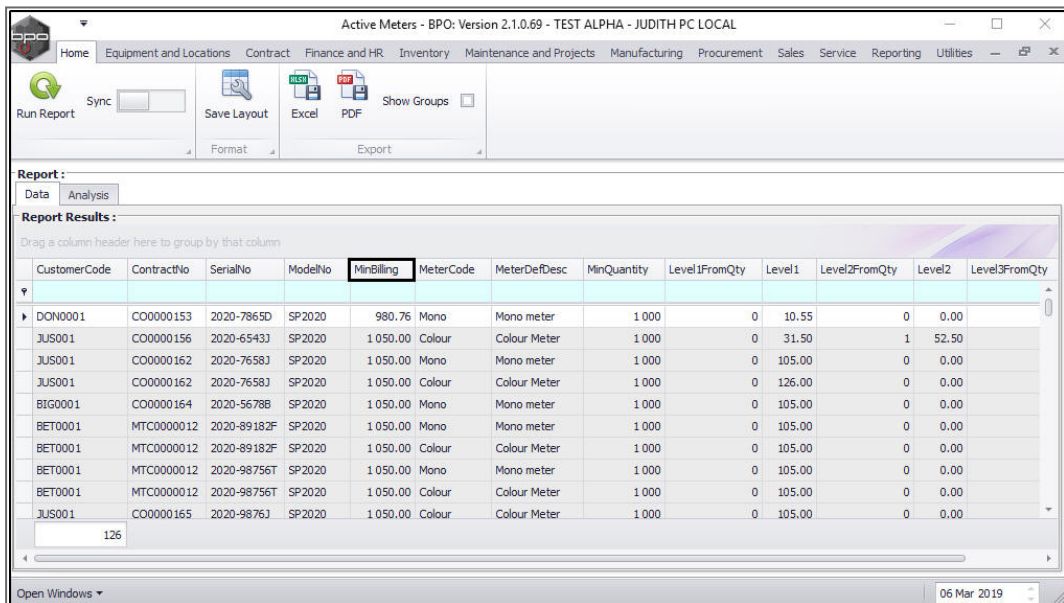
Or,

1. **Click on** the selected column header in the Group By box.
 - In this image, **Min Billing** is selected.
2. **Drag** this header downwards until,
3. a black [X] appears then **Drop** the box.



- The data grid will now be displayed without the grouping option.

Note: If you cannot find the column you removed from the **Group By** box, then **add** the column to the data grid.

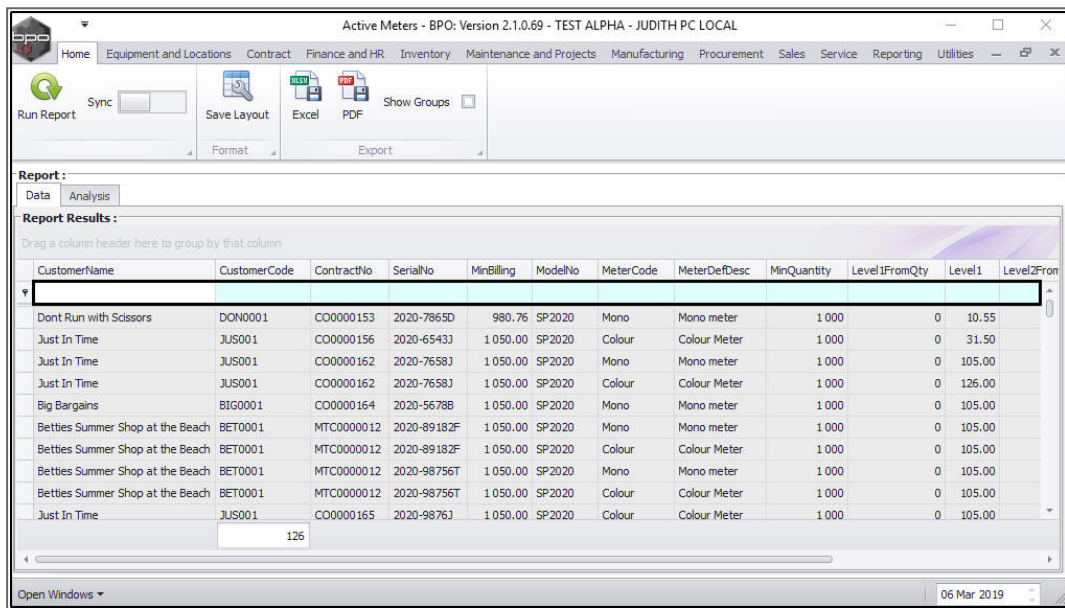


FILTERING COLUMNS

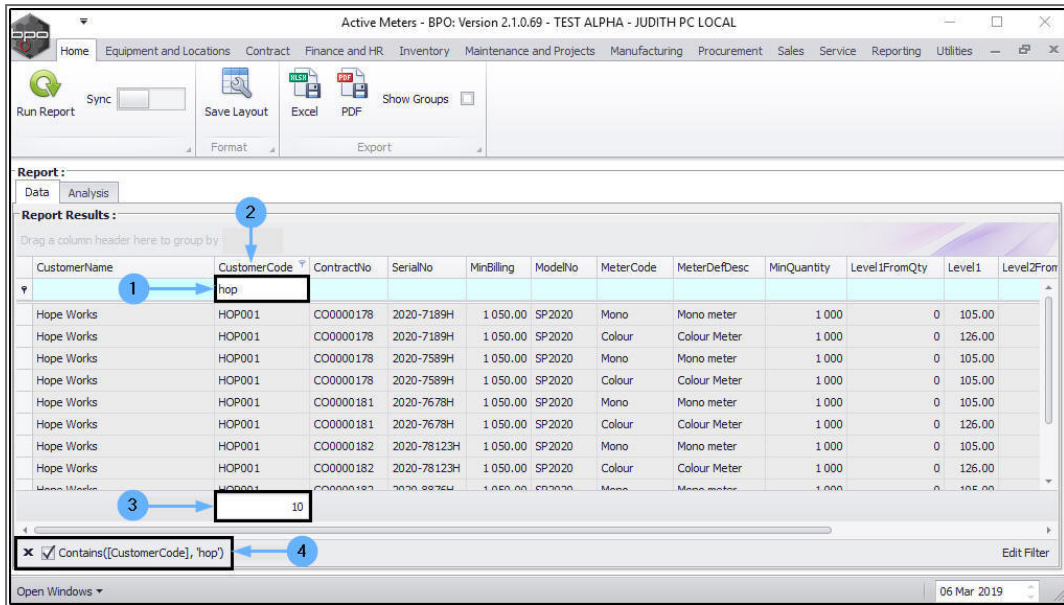
THE FILTER SEARCH ROW

The **Filter Search Row** can be used to filter the data in the open screen.

- This row will display any choices of column filtering that you have made in that screen.
- You can type directly in this row to filter your columns.



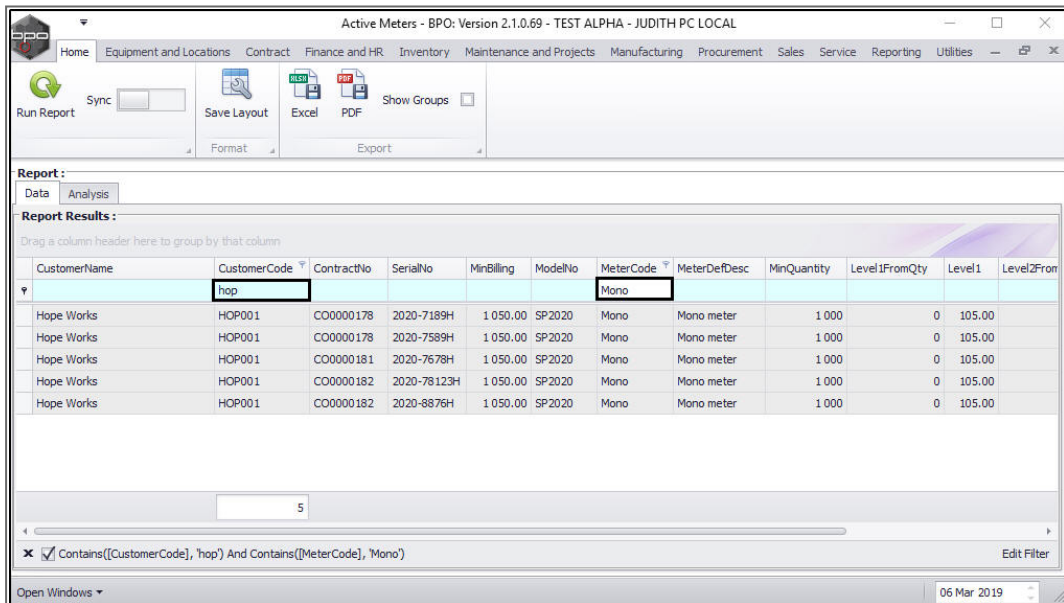
1. In this example, **hop** has been typed in the **Filter Search row** of the **Customer Code** column.
2. The **Customer Code** column now displays all the results of this filter i.e. all the rows containing the word **hop** in that column.
3. The total number of results is displayed at the bottom of the column.
4. All filters can be viewed at the bottom of the screen.



FILTER MULTIPLE COLUMNS

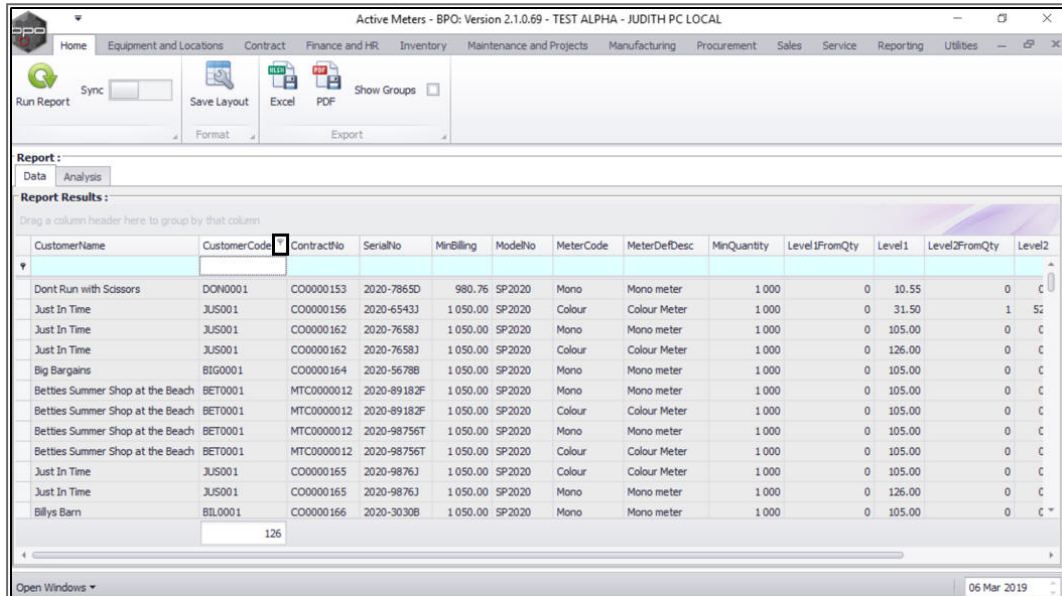
You can also filter **more than one** column.

- In this image, the data is filtered by **Customer Code** and **Meter Code**.

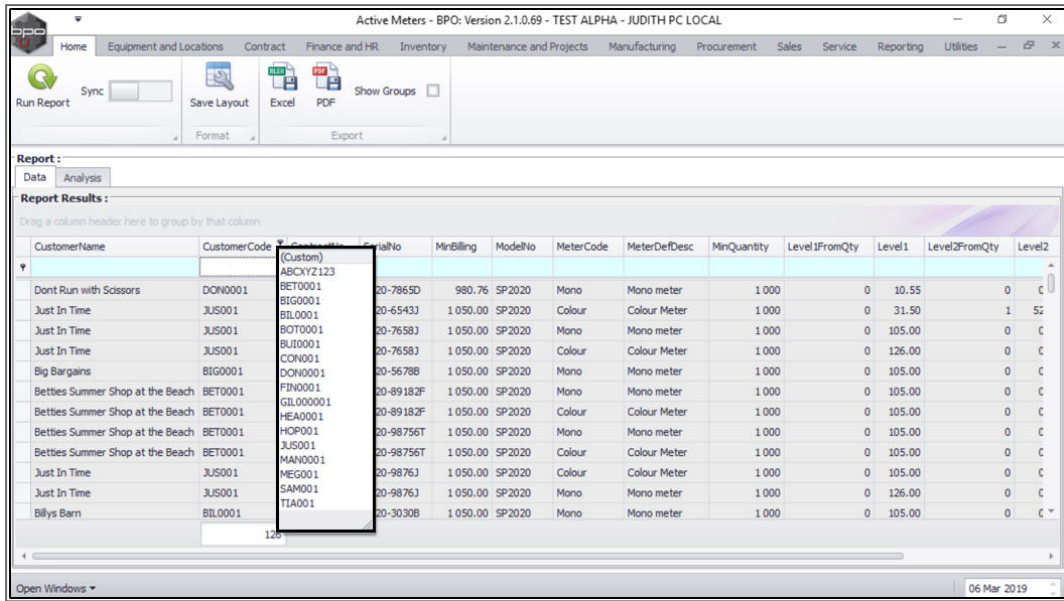


THE COLUMN HEADER FILTER ICON

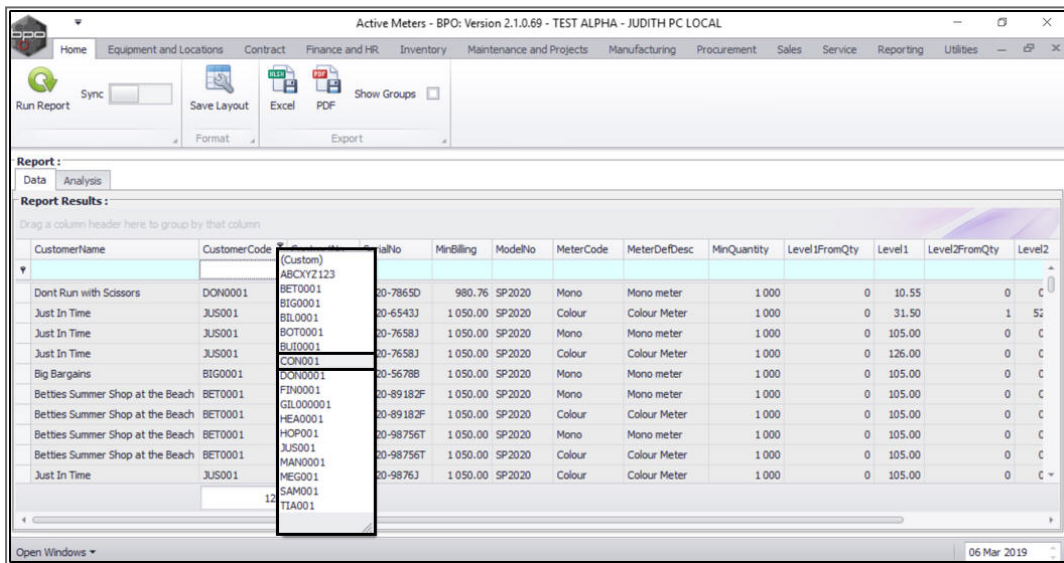
- You can also filter in columns by **hovering** over the column header cell.
- The column header cell will **highlight white**.
- A **Filter icon** will appear in the top right of the column header cell.



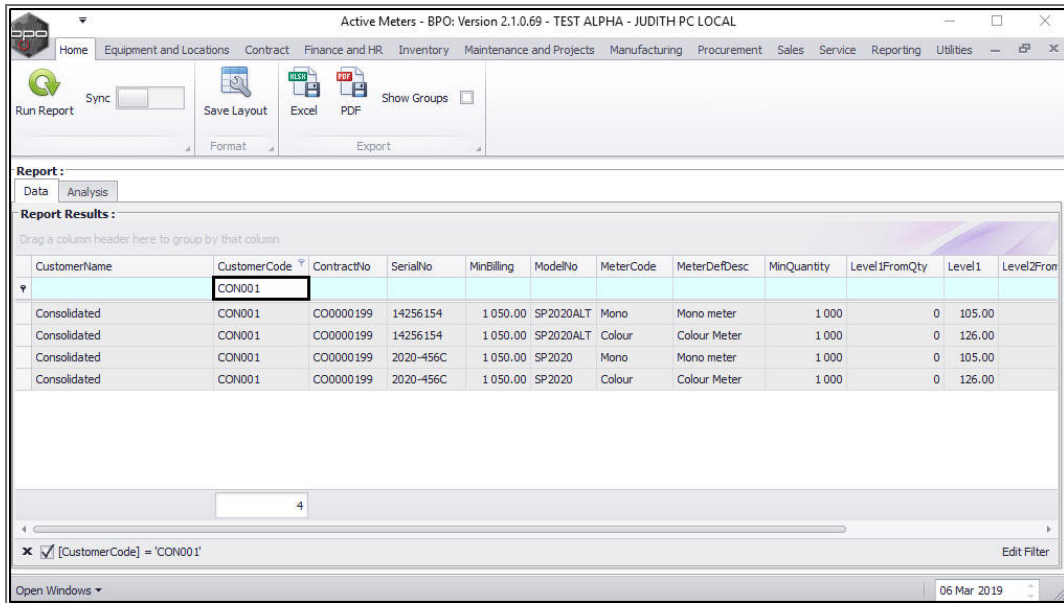
- Click on this **Filter** icon.
- A quick reference drop-down **Filter menu** will be displayed.
- This menu lists in numerical / alphabetical order the **contents** of the selected column.



- Click on your choice of **filter** in this menu.
- In this image, filter **CON001** has been selected.



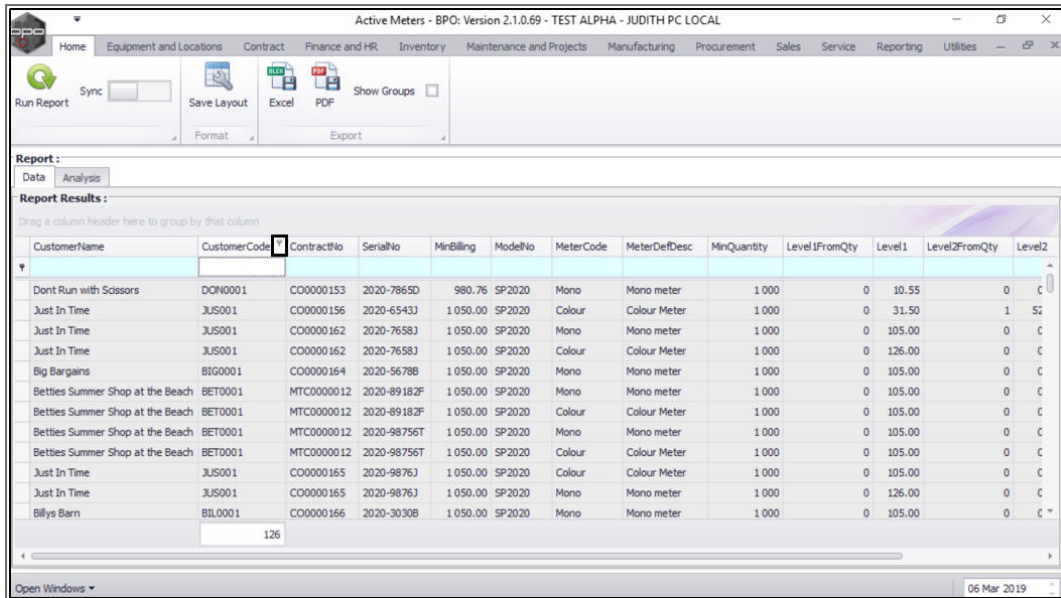
- The data grid will now display the results of that filter.



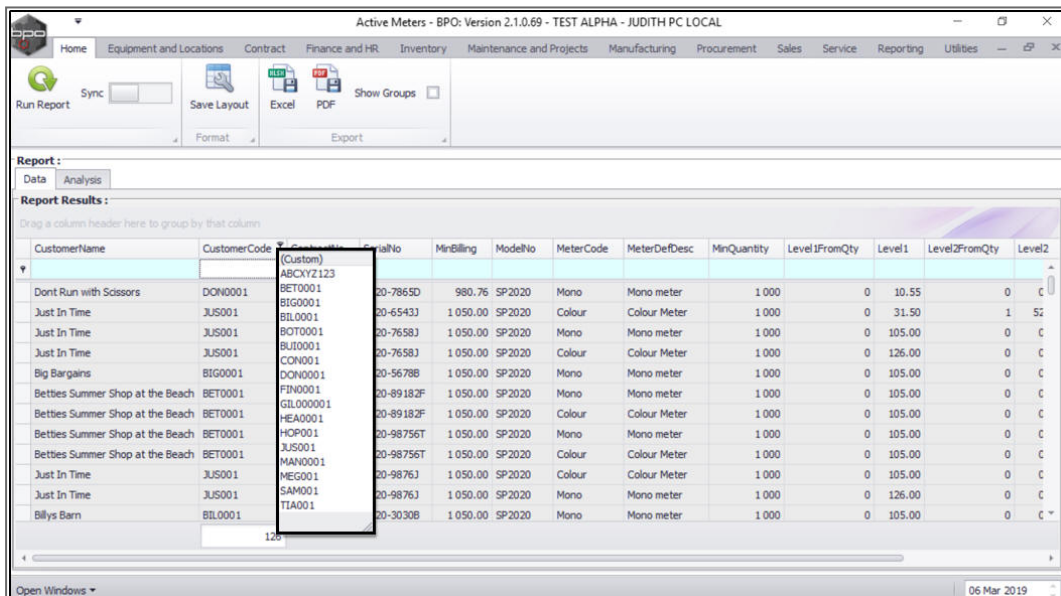
THE CUSTOM FILTER

Follow a similar process to select the **Custom Filter**.

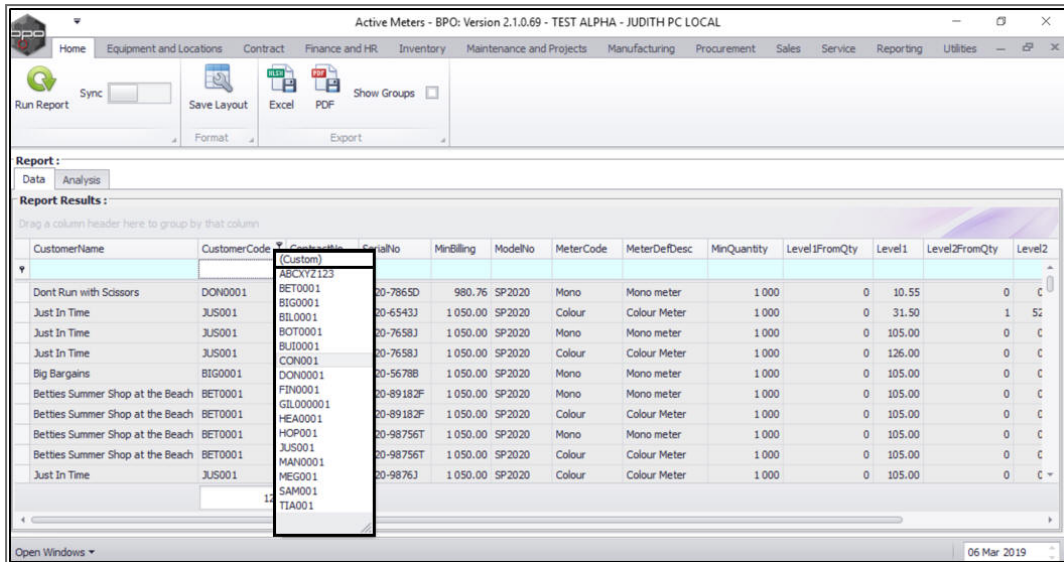
- **Hover over** the selected column header cell.
- The column header cell will **highlight white**.
- A **filter icon** will appear in the top right of the column header cell.



- Click on this **filter icon**.
- A quick reference **drop-down filter menu** will be displayed.
- This **drop-down filter menu** lists in numerical / alphabetical order the contents of the selected column.



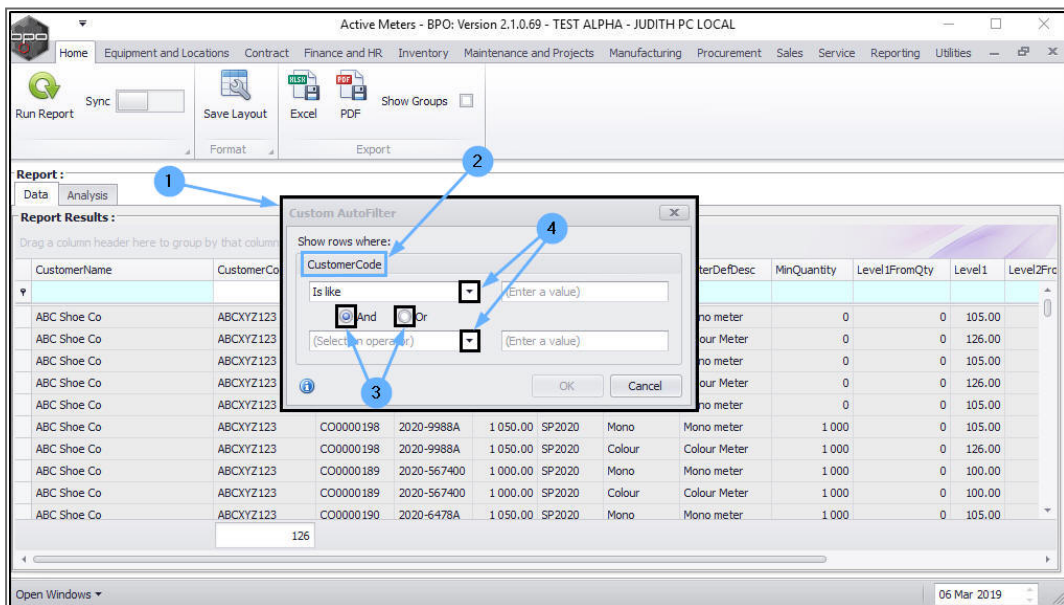
- Select **Custom**.



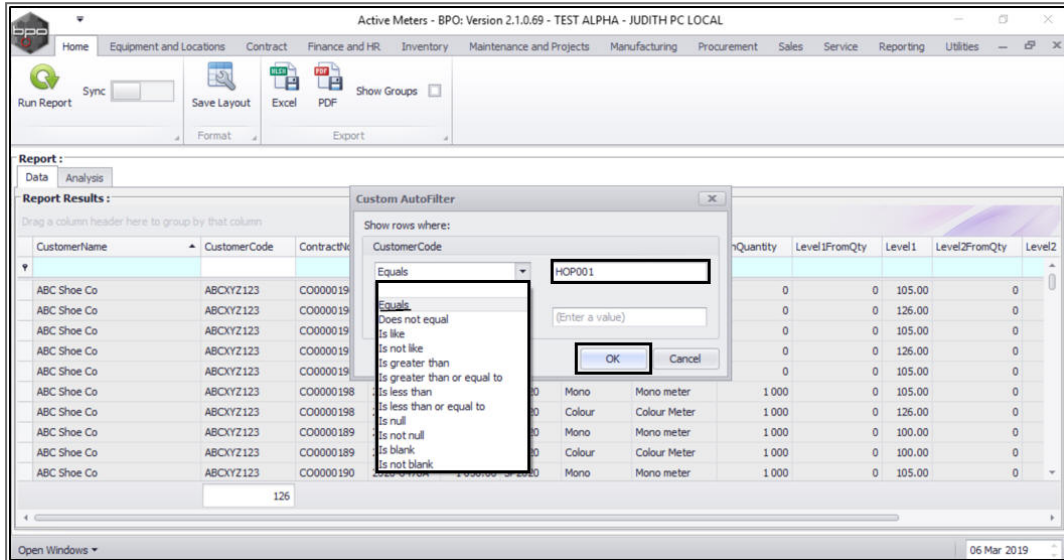
1. The **Custom AutoFilter** screen will be displayed.
2. You will note that this screen will display information that corresponds with the column selected - in this example; **Customer Code**.

There are a **multitude** of filter options:

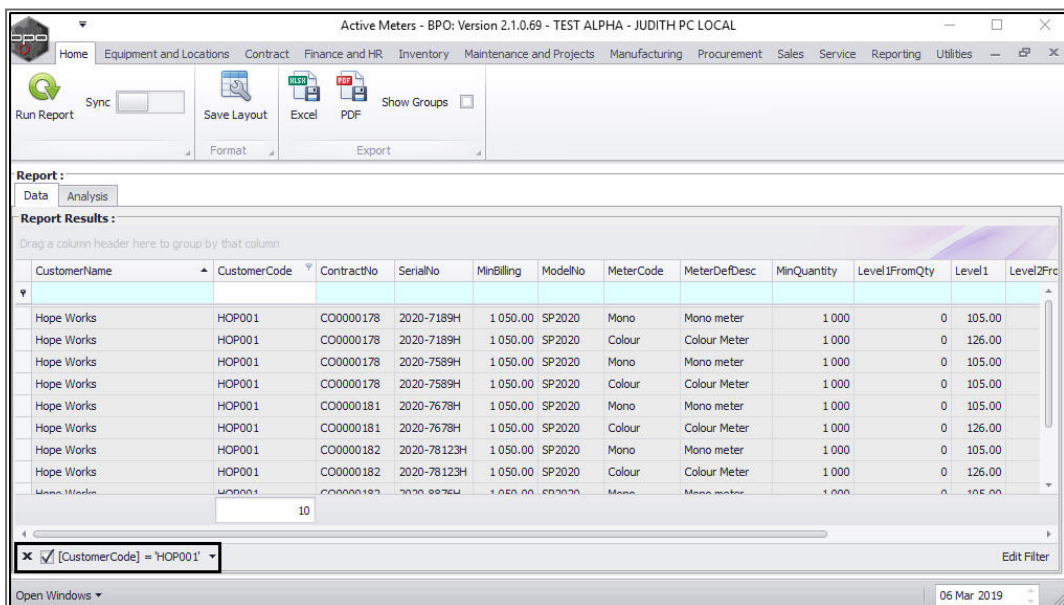
3. You can use the **radio buttons** and
4. the **drop-down arrows** to select the custom filter you wish to use.



- Type in the **value** relating to the custom filter.
 - In this image, the filter option **Equals** has been selected and filter value **HOP001** has been typed in.
- Click on **Ok**.

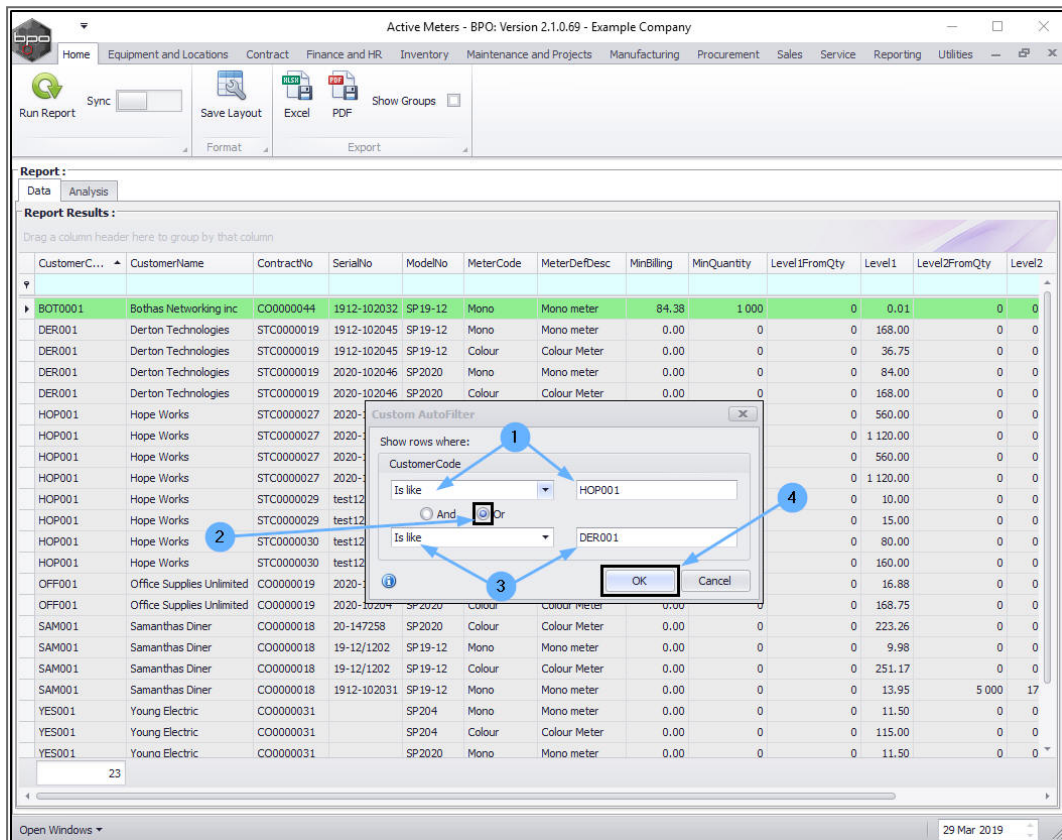


- The report will now be filtered according to the selected filter.
- In this image, only rows with **Customer Code equal to HOP001** are now displayed as shown in the **Edit Filter** row.



You have the option to use a **second** filter, if required.

1. In this image, the **first** filter **Is like HOP001**.
2. The **Or** radio button filter has been selected.
3. The second filter is **Is like DER001**.
4. Click on **Ok**.



1. The Report Results data grid will now be filtered according to the selections made.
2. The **Edit Filter** row will display the selected filters for reference.

Active Meters - BPO: Version 2.1.0.69 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Run Report Sync Save Layout Excel PDF Show Groups

Report: Data Analysis

Report Results:

Drag a column header here to group by that column

Customer...	CustomerName	ContractNo	SerialNo	ModelNo	MeterCode	MeterDefDesc	MinBilling	MinQuantity	Level1FromQty	Level1	Level2FromQty	Level2
DER001	Derton Technologies	STC0000019	1912-102045	SP19-12	Mono	Mono meter	0.00	0	0	168.00	0	0.00
DER001	Derton Technologies	STC0000019	1912-102045	SP19-12	Colour	Colour Meter	0.00	0	0	36.75	0	0.00
DER001	Derton Technologies	STC0000019	2020-102046	SP2020	Mono	Mono meter	0.00	0	0	84.00	0	0.00
DER001	Derton Technologies	STC0000019	2020-102046	SP2020	Colour	Colour Meter	0.00	0	0	168.00	0	0.00
HOP001	Hope Works	STC0000027	2020-103059	SP2020	Mono	Mono meter	0.00	0	0	560.00	0	0.00
HOP001	Hope Works	STC0000027	2020-103059	SP2020	Colour	Colour Meter	0.00	0	0	1 120.00	0	0.00
HOP001	Hope Works	STC0000027	2020-103059	SP2020	Mono	Mono meter	0.00	0	0	560.00	0	0.00
HOP001	Hope Works	STC0000027	2020-103059	SP2020	Colour	Colour Meter	0.00	0	0	1 120.00	0	0.00
HOP001	Hope Works	STC0000029	test121212	SP2020	Mono	Mono meter	0.00	0	0	10.00	0	0.00
HOP001	Hope Works	STC0000029	test121212	SP2020	Colour	Colour Meter	0.00	0	0	15.00	0	0.00
HOP001	Hope Works	STC0000030	test1234	SP2020	Mono	Mono meter	0.00	0	0	80.00	0	0.00
HOP001	Hope Works	STC0000030	test1234	SP2020	Colour	Colour Meter	0.00	0	0	160.00	0	0.00

12

[x] [CustomerCode] Like 'HOP001' Or [CustomerCode] Like 'DER001' Edit Filter

Open Windows 29 Mar 2019

Related Topics

- [Using BPO2 Data Grids](#)
- [Introduction to All Reports](#)

MNU.149.003

