

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

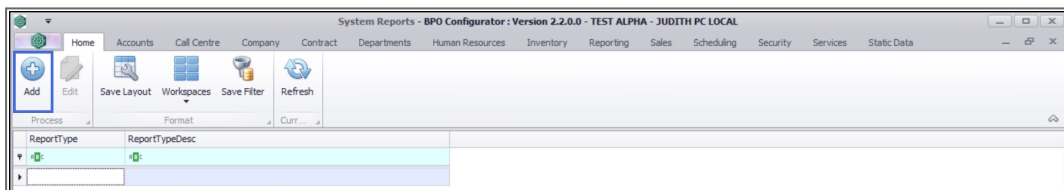
## REPORTING

### ADD A NEW REPORT

**Ribbon Access:** Configurator > Reporting > System Reports



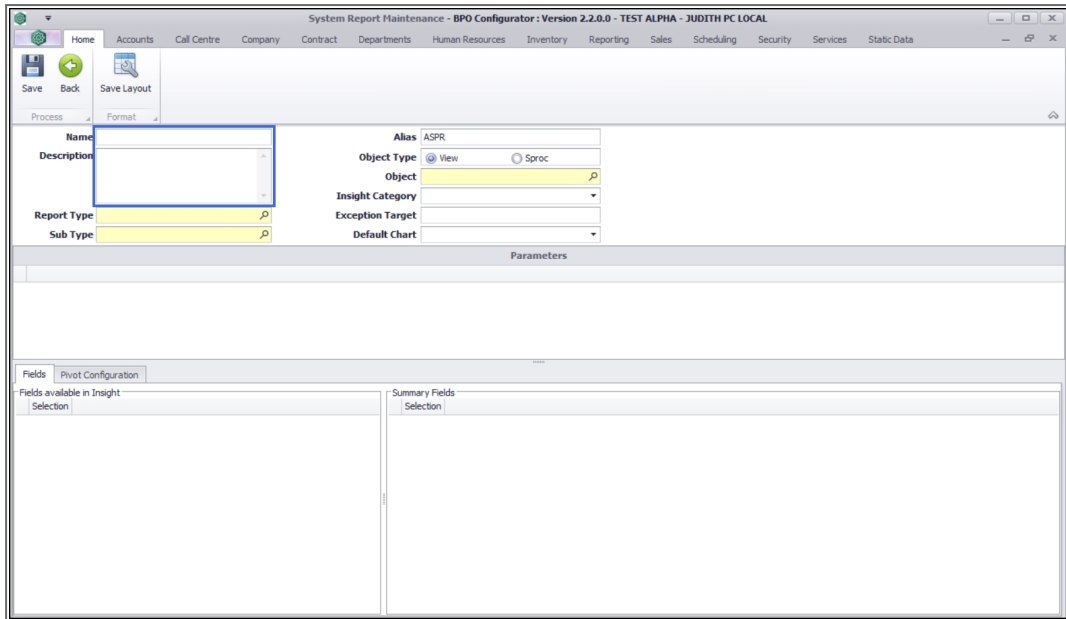
- The **System Reports** screen will be displayed.
- Click on **Add**.



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

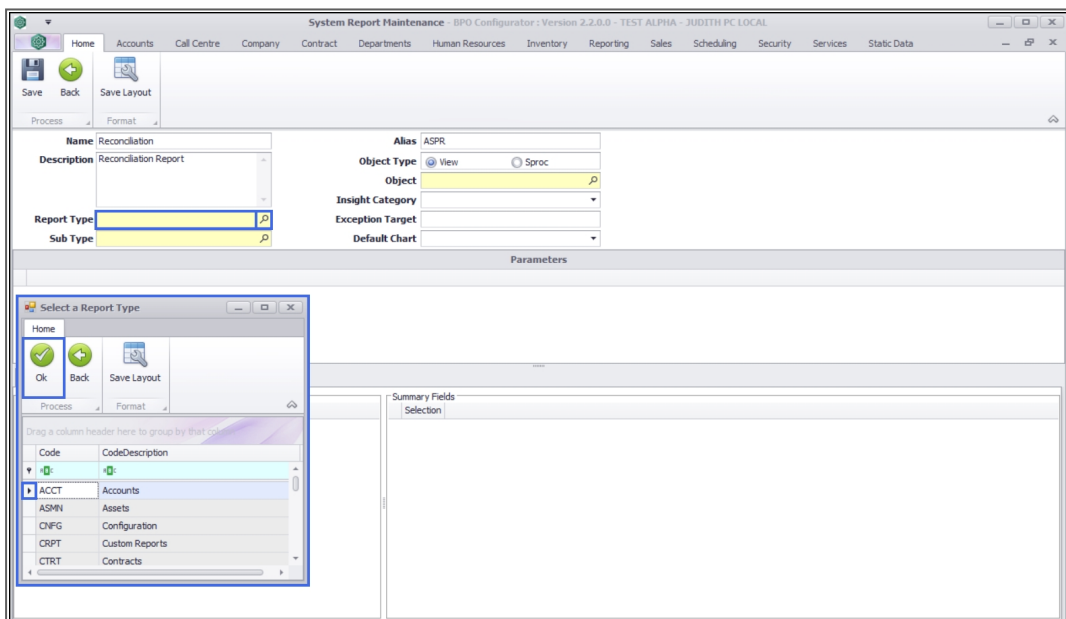
### REPORT NAME AND DESCRIPTION

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



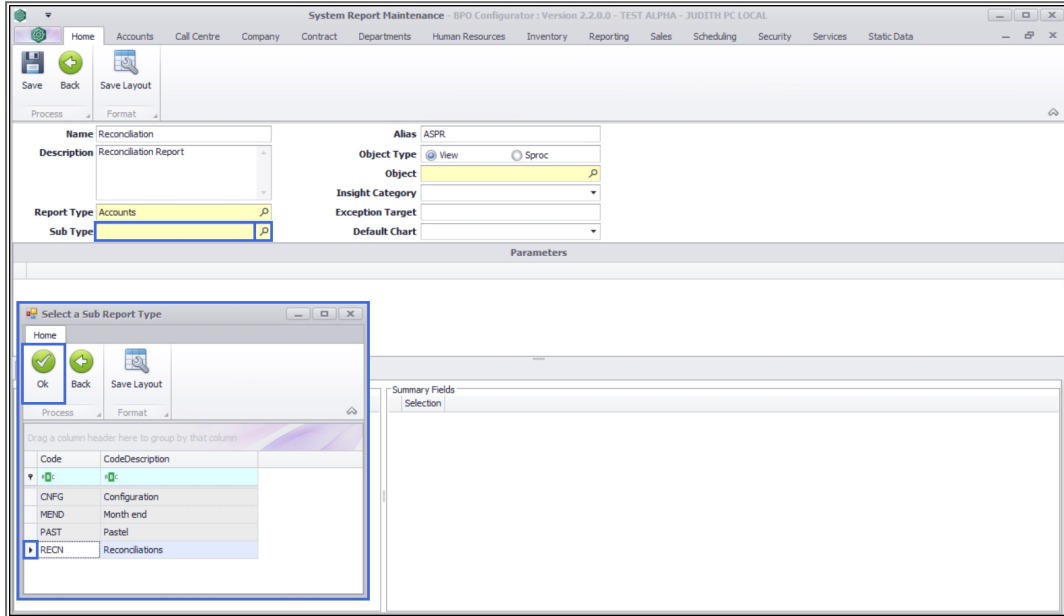
## REPORT TYPE

**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.

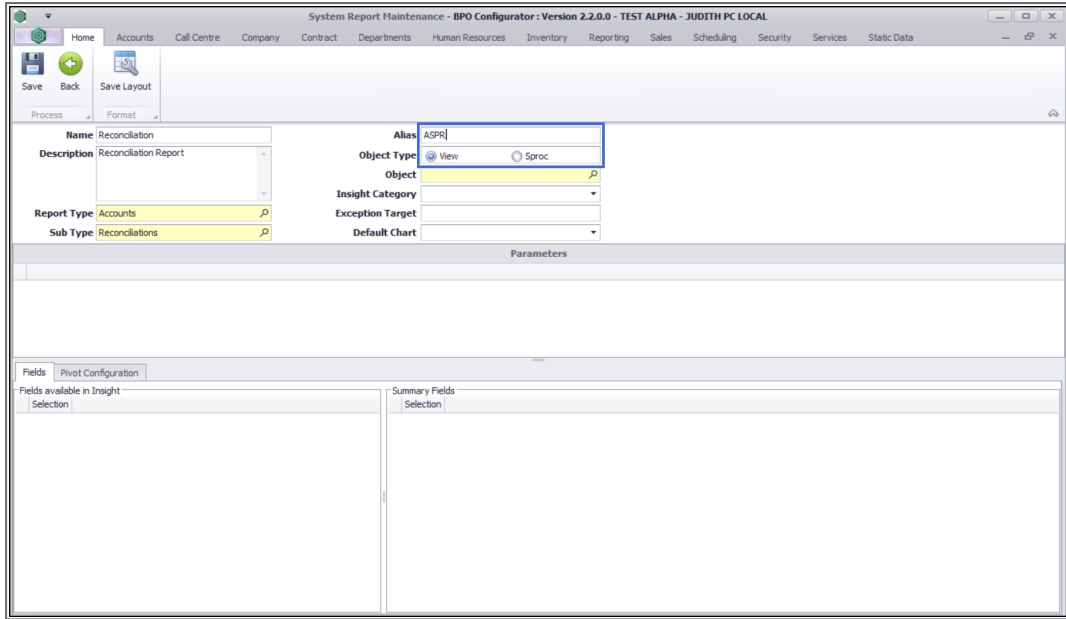


## ALIAS

**Alias:** This will be populated by default.

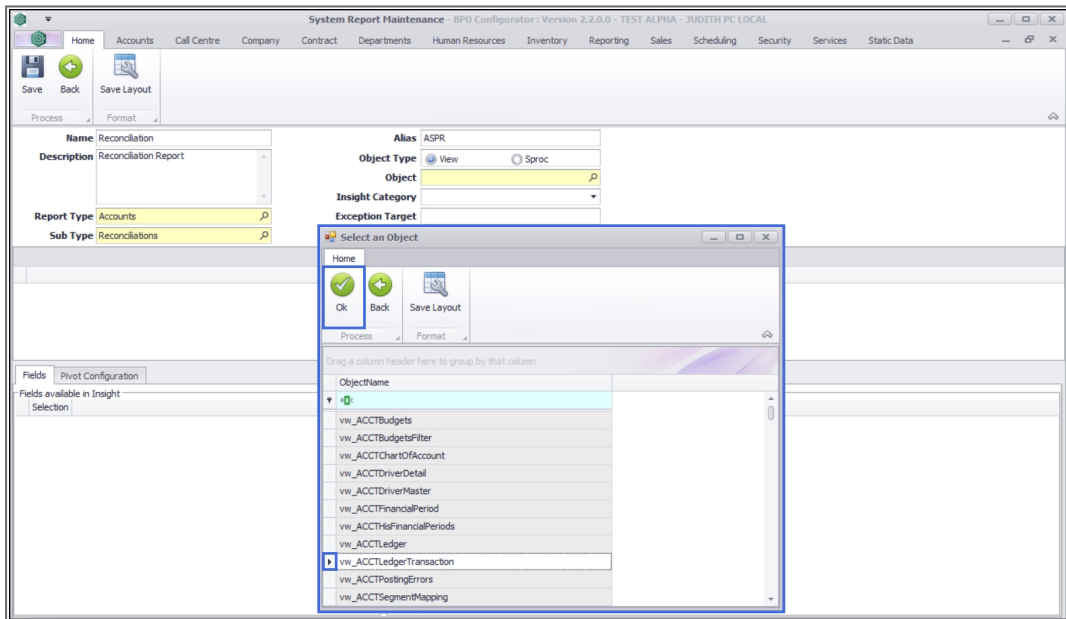
## OBJECT TYPE

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



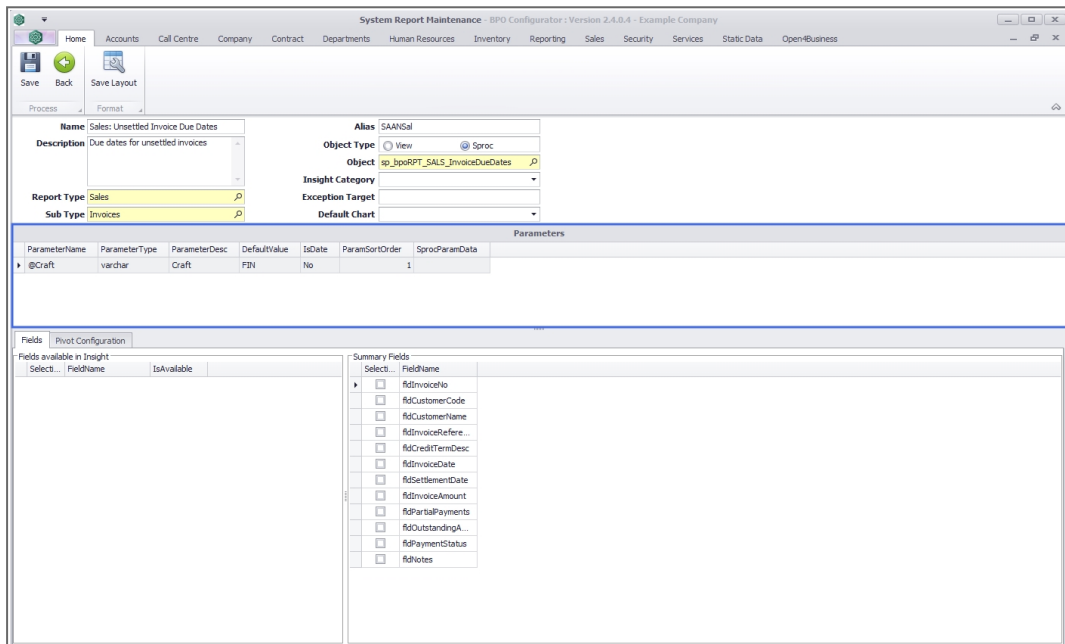
## OBJECT

**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.



## PARAMETER INPUT VALUES

### Version Compatibility<sup>1</sup>

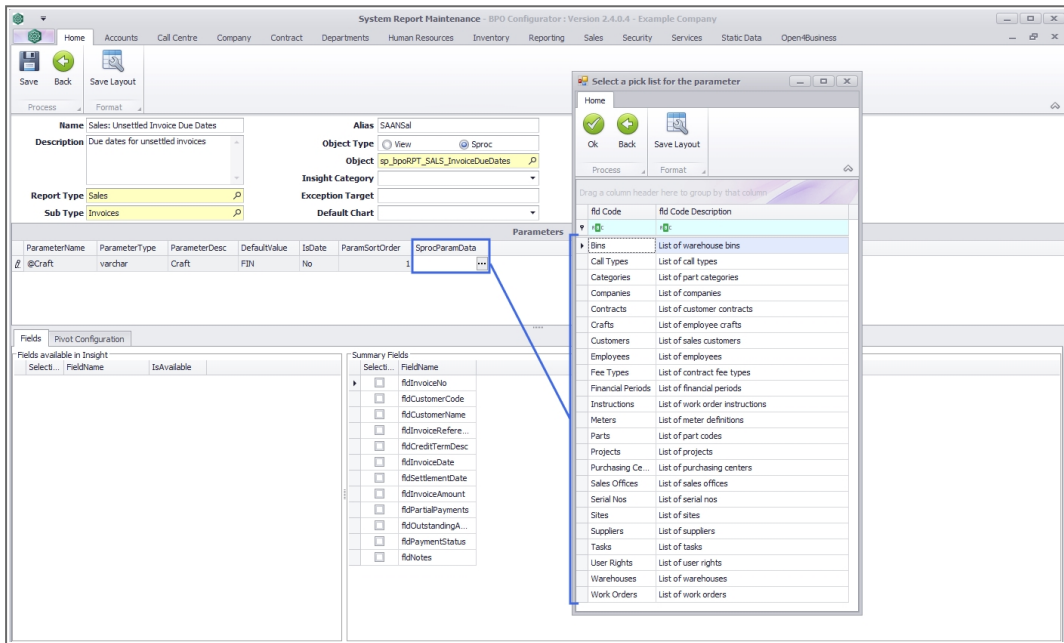
- You can select parameter input values from a drop-down list where a pick list has been defined for all parameters except for

<sup>1</sup> BPO2 v2.5.0.8 or higher

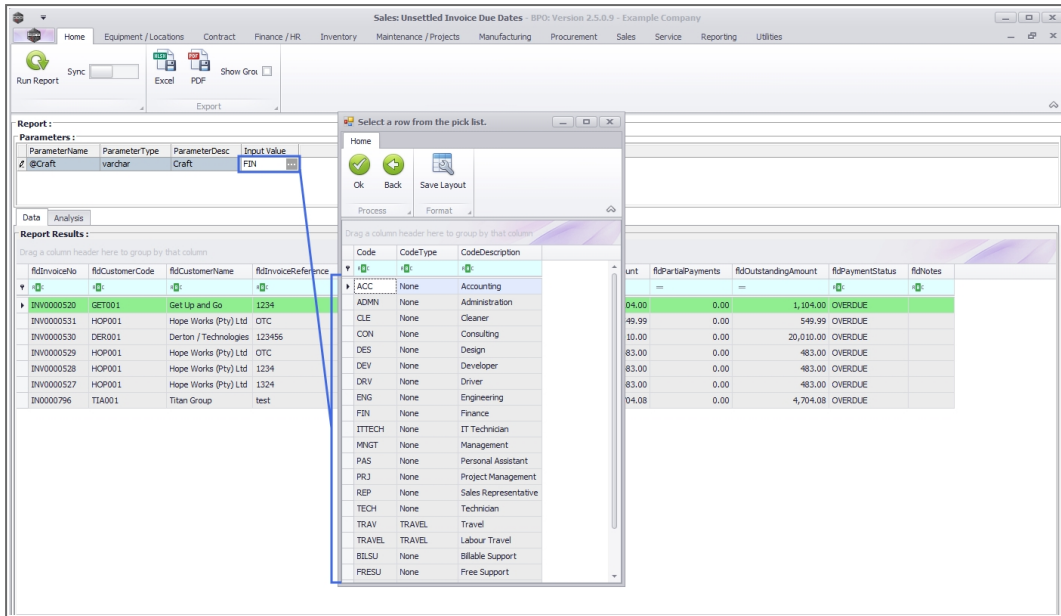
Dates. Input values can still be manually typed, but these will now be validated against records generated in the pick list.

- 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.

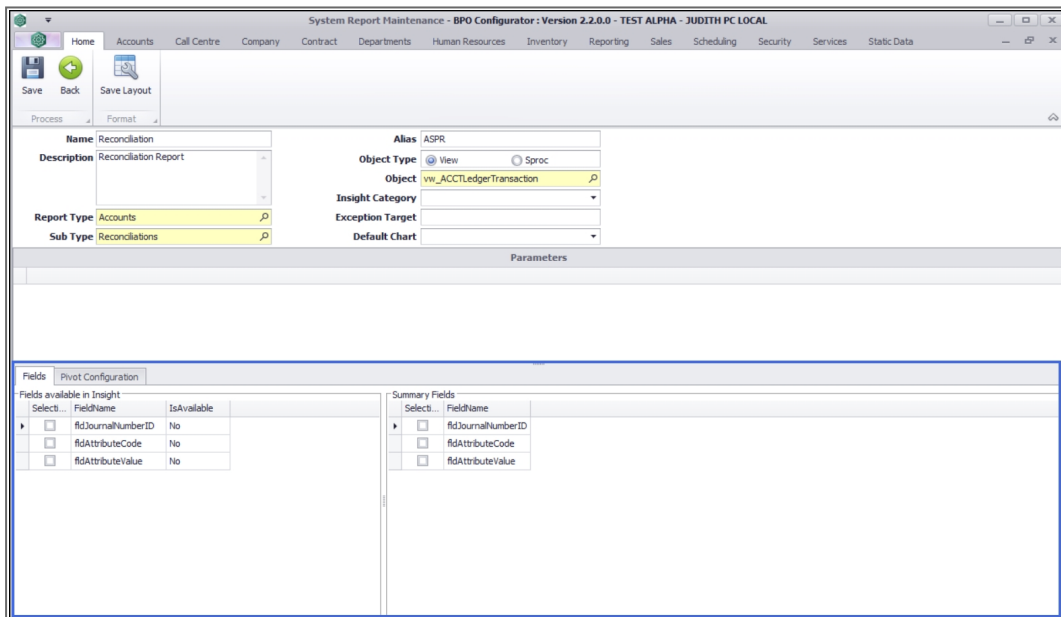


Now when pulling the report in BPO, a list of crafts as configured in the system will appear in a selection list.



## FIELDS AND PIVOT CONFIGURATION

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



## INSIGHT CATEGORY

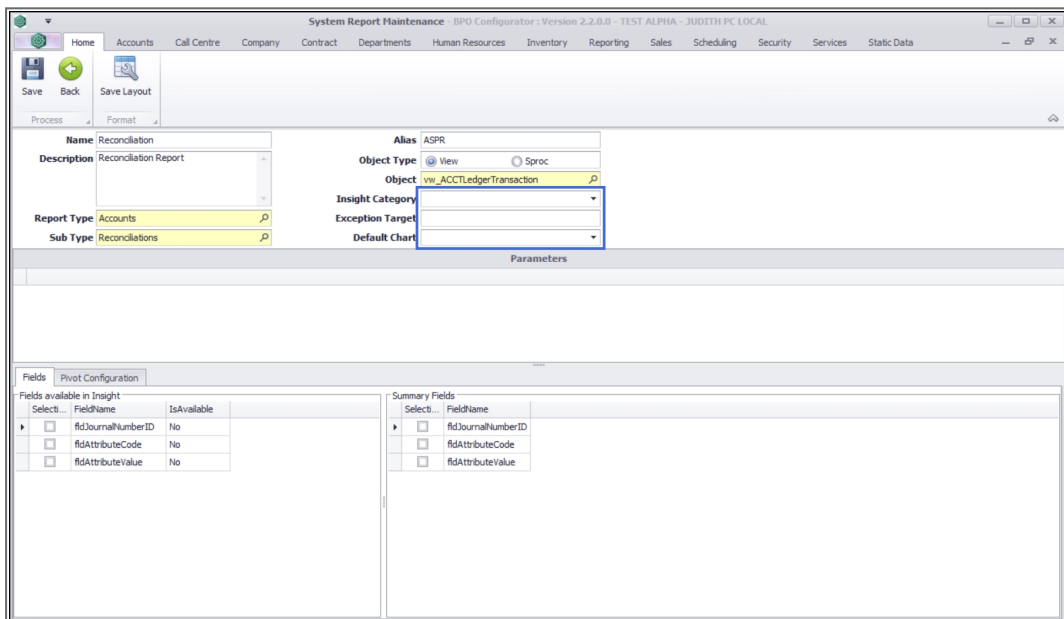
Click on the down arrow and select the required option.

## EXCEPTION TARGET

Type in the Exception Target if required.

## DEFAULT CHART

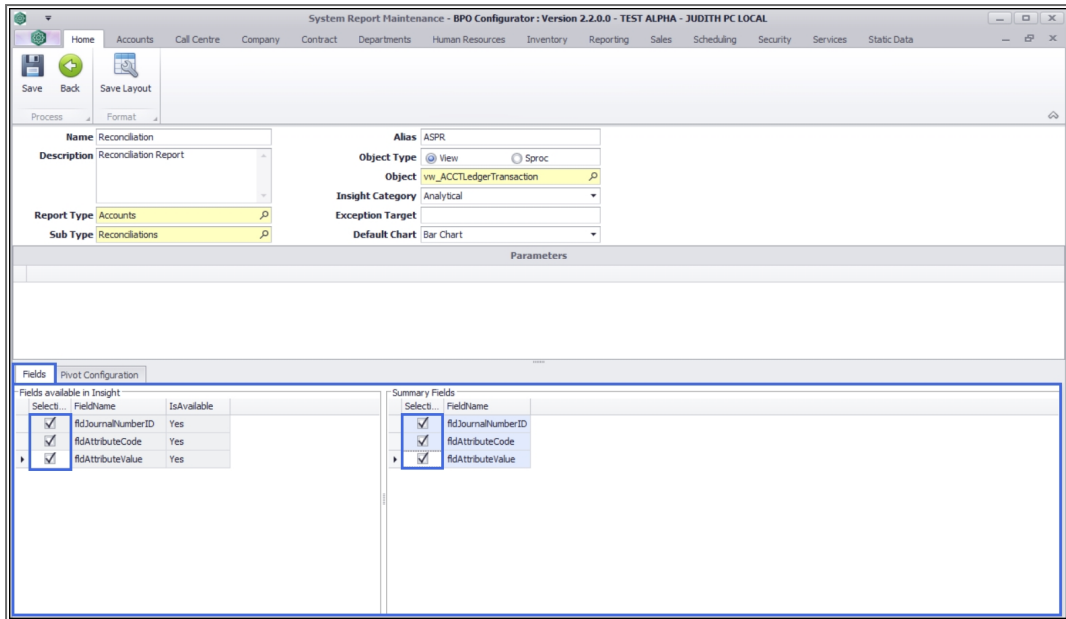
Click on the down arrow and select the required default chart.



## FIELDS

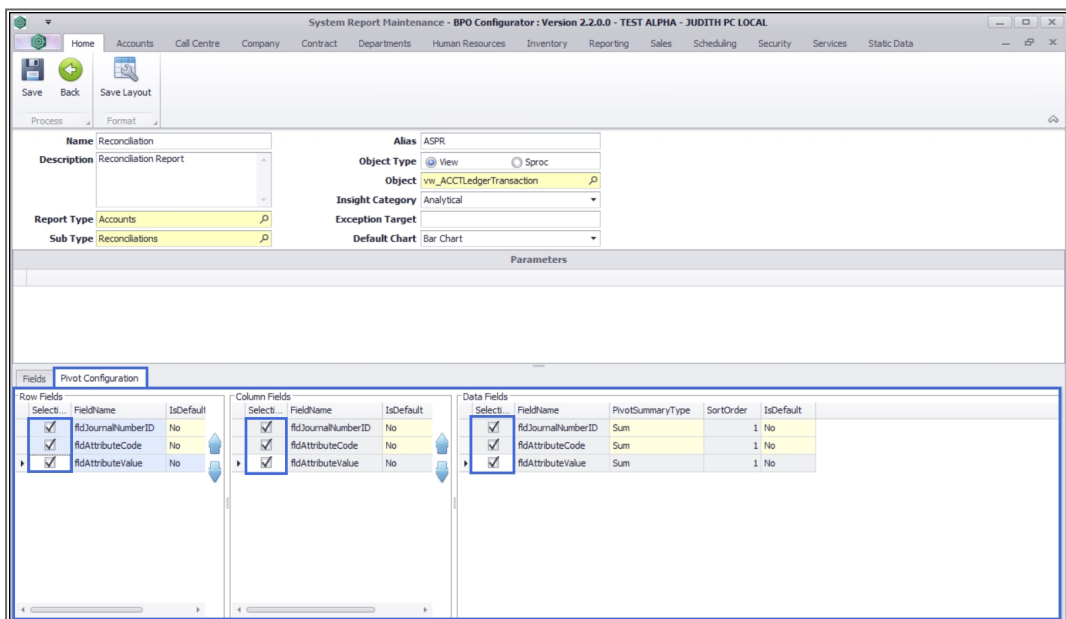
Select all the fields you would like to see in the report. It is recommended that you select all the available fields.





## 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...	Select...	Select...
Field Name	Field Name	Field Name
IsDefault	IsDefault	PivotSummaryType
		SortOrder
		IsDefault
<input checked="" type="checkbox"/> fldJournalNumberID No	<input checked="" type="checkbox"/> fldJournalNumberID No	<input checked="" type="checkbox"/> fldJournalNumberID Sum 1 No
<input checked="" type="checkbox"/> fldAttributeCode No	<input checked="" type="checkbox"/> fldAttributeCode No	<input checked="" type="checkbox"/> fldAttributeCode Sum 1 No
<input checked="" type="checkbox"/> fldAttributeValue No	<input checked="" type="checkbox"/> fldAttributeValue No	<input checked="" type="checkbox"/> fldAttributeValue Sum 1 No

## SAVE REPORT

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

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**Save** Back Save Layout

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Row Fields	Column Fields	Data Fields
Select...	Select...	Select...
Field Name	Field Name	Field Name
IsDefault	IsDefault	PivotSummaryType
		SortOrder
		IsDefault
<input checked="" type="checkbox"/> fldJournalNumberID No	<input checked="" type="checkbox"/> fldJournalNumberID No	<input checked="" type="checkbox"/> fldJournalNumberID Sum 1 No
<input checked="" type="checkbox"/> fldAttributeCode No	<input checked="" type="checkbox"/> fldAttributeCode No	<input checked="" type="checkbox"/> fldAttributeCode Sum 1 No
<input checked="" type="checkbox"/> fldAttributeValue No	<input checked="" type="checkbox"/> fldAttributeValue No	<input checked="" type="checkbox"/> fldAttributeValue Sum 1 No

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