

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.

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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.



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REPORT TYPE

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

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ASMN Assets	*								
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CRP1 Custom Reports CTRT Contracts									
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SUB TYPE

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

•				System	Report Mainten	ance - BPO Configur	rator : Version	2.2.0.0 - TES	T ALPHA	JUDITH PC L	DCAL			_ – X
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ALIAS

Alias: This will be populated by default.

OBJECT TYPE

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



•				System	Report Mainter	nance - BPO Configu	rator : Version	2.2.0.0 - TES	5T ALPHA ·	JUDITH PC L	DCAL			_ – x
Home	Accounts	Call Centre	Company	Contract	Departments	Human Resources	Inventory	Reporting	Sales	Scheduling	Security	Services	Static Data	_ & ×
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OBJECT

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

• •	System Report Maintena	nce - BPO Configurator : Versi	on 2.2.0.0 - TES	T ALPHA -	JUDITH PC LC	CAL			_ – ×
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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.

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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.

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



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					MNGT	None	Management							
					PAS	None	Personal Assistant							
					PRJ	None	Project Management							
					REP	None	Sales Representative							
					TECH	None	Technician							
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FIELDS AND PIVOT CONFIGURATION

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

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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.

				System	Report Mainte	nance - BPO Configu	rator : Versio	1 2.2.0.0 - TES	T ALPHA	- JUDITH PC L	OCAL			_ D X
Home	Accounts	Call Centre	Company	Contract	Departments	Human Resources	Inventory	Reporting	Sales	Scheduling	Security	Services	Static Data	_ & x
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FIELDS

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



				System	Report Mainten	ance - BPO Configu	rator : Version	2.2.0.0 - TE	ST ALPHA	JUDITH PC L	DCAL			_ – X
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PIVOT CONFIGURATION

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

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Home	Accounts	Call Centre	C	Company	Contract De	partments	Huma	in Resources	Inventory	Repo	orting Sales	Scheduling	Security	Services	Static Data	_ & ×
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• Click on the **blue arrows** to move the fields up or down.



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Home	Accounts	Call Centre	Company	Contract Depa	artments	Hum	an Resour	ces Inventory	Repo	orting Sales	Scheduling	Security	Services	Static Data	_ & ×
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SAVE REPORT

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

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