

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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## **SUB TYPE**

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

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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.



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# **OBJECT**

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

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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 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.

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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							
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					PRJ	None	Project Management							
					REP	None	Sales Representative							
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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.

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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.



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Home	Accounts	Call Centre	Company	Contract	Departments	Human Resources	Inventory	Reporting	Sales	Scheduling	Security	Services	Static Data	_ & ×
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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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• Click on the **blue arrows** to move the fields up or down.



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# **SAVE REPORT**

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

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