

REPORTING

ALL REPORTS – INTRODUCTION TO ALL REPORTS

An updated Reporting screen has been added within the **BPO_V2** application interface, this allows you view reports as you would in **BPO View Reports** or **BPO_Explorer**.

Users can search for reports by **Report Name** or **Report Description**, view **Recently Used** and **Most Used**.

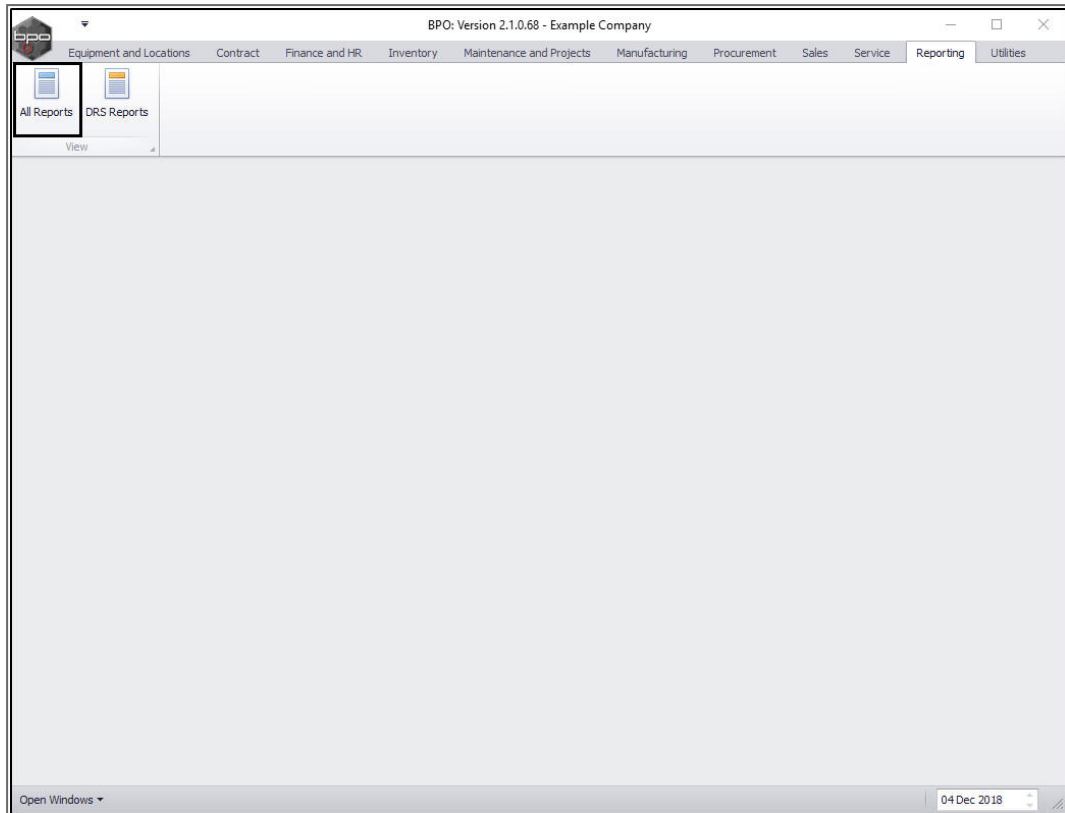
Users can select which columns to view, in which order they want to view them, and save these settings.

When viewing the reports in the report tree, the description is also displayed.

When hovering on the reports in **Recently used** and **Most Used**, the user can see the description of the report via a tool tip text box.

Security rights must to be configured per group that requires access.

Ribbon Access: *Reporting > All Reports*

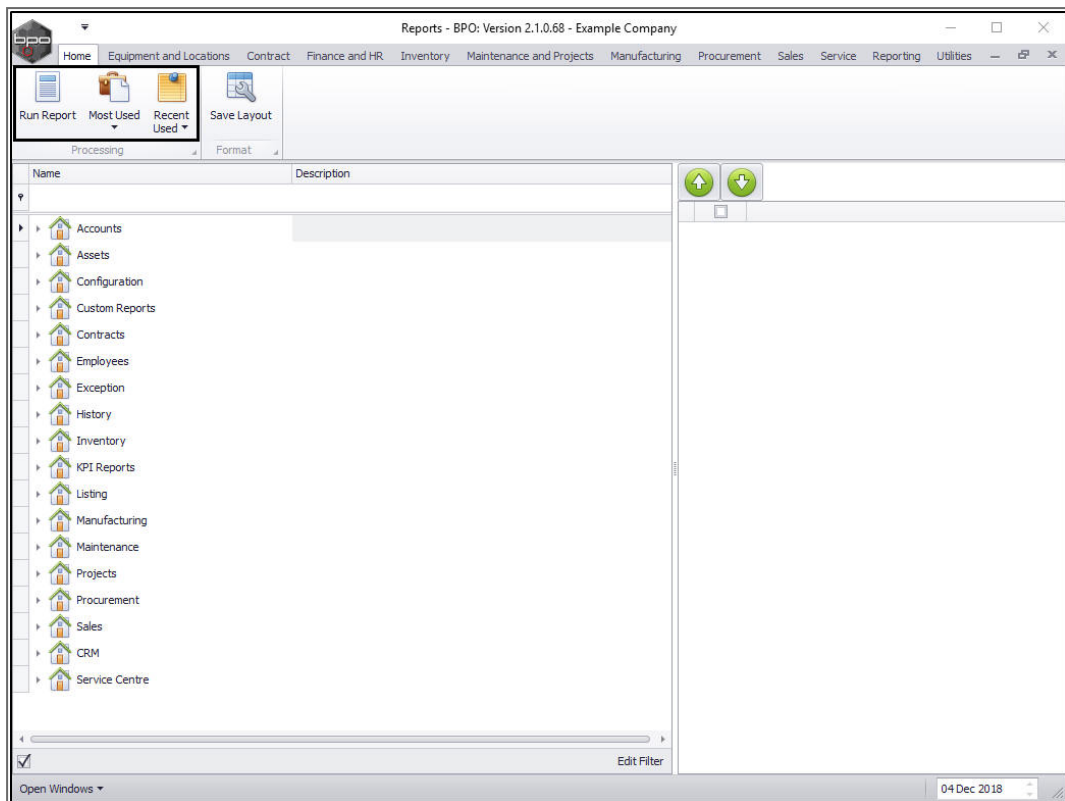


The **Reports** listing screen will be displayed.

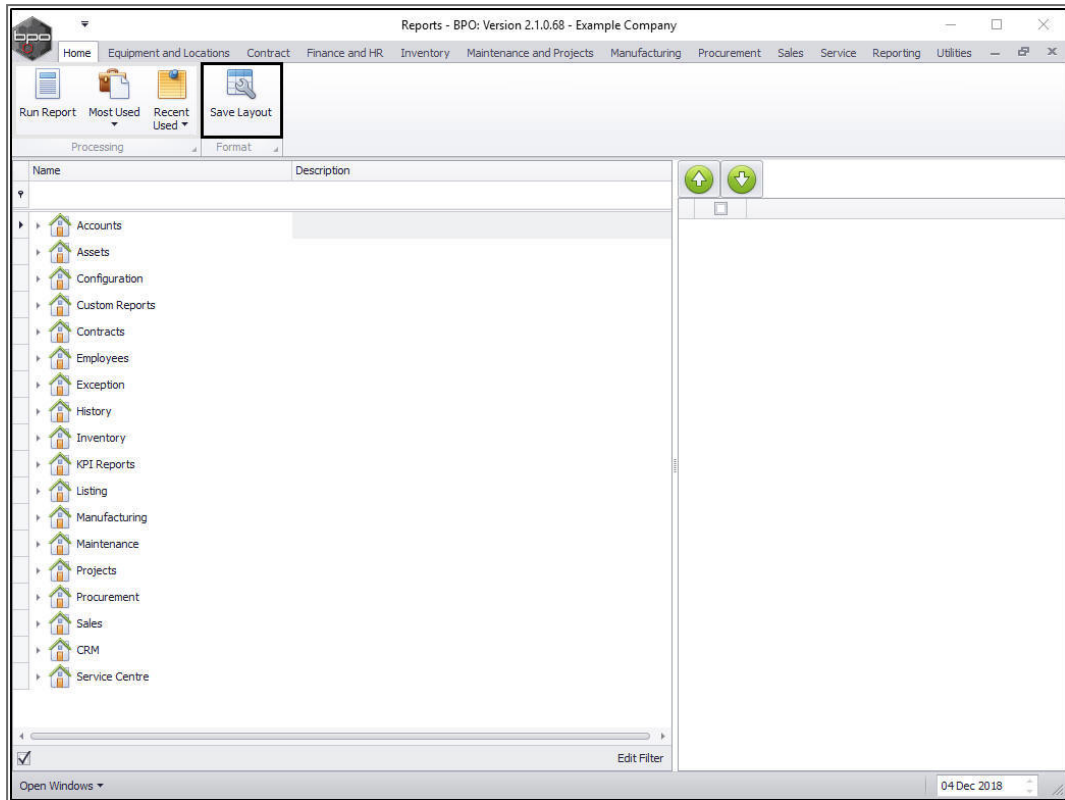
REPORTS ACTION BUTTONS

The Reports **Processing** action button toolbar gives you the following options:

- **Run Report:** Run a report.
- **Most Used:** View the reports that you run the most frequently.
- **Recent Used:** View the reports that you most recently ran.

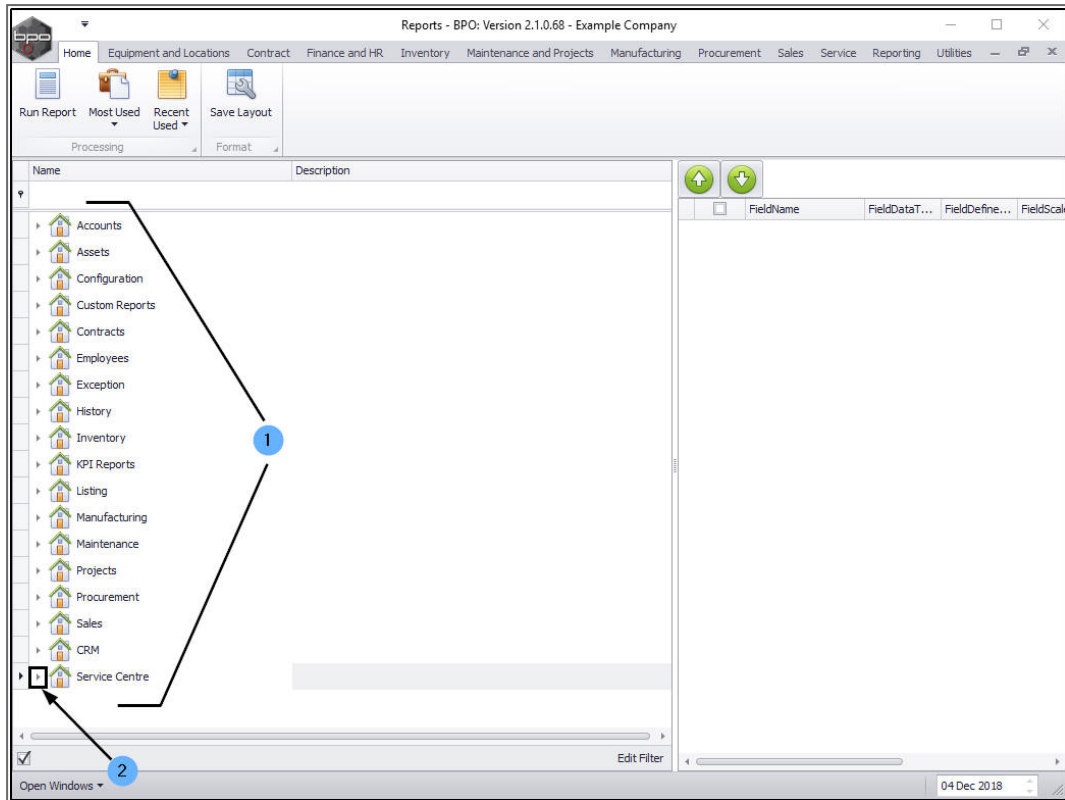


- This screen supports the [Save Layout](#) functionality. If you click on this button after you have made changes to the configuration of the data grid in this screen, your changes will be **saved**.

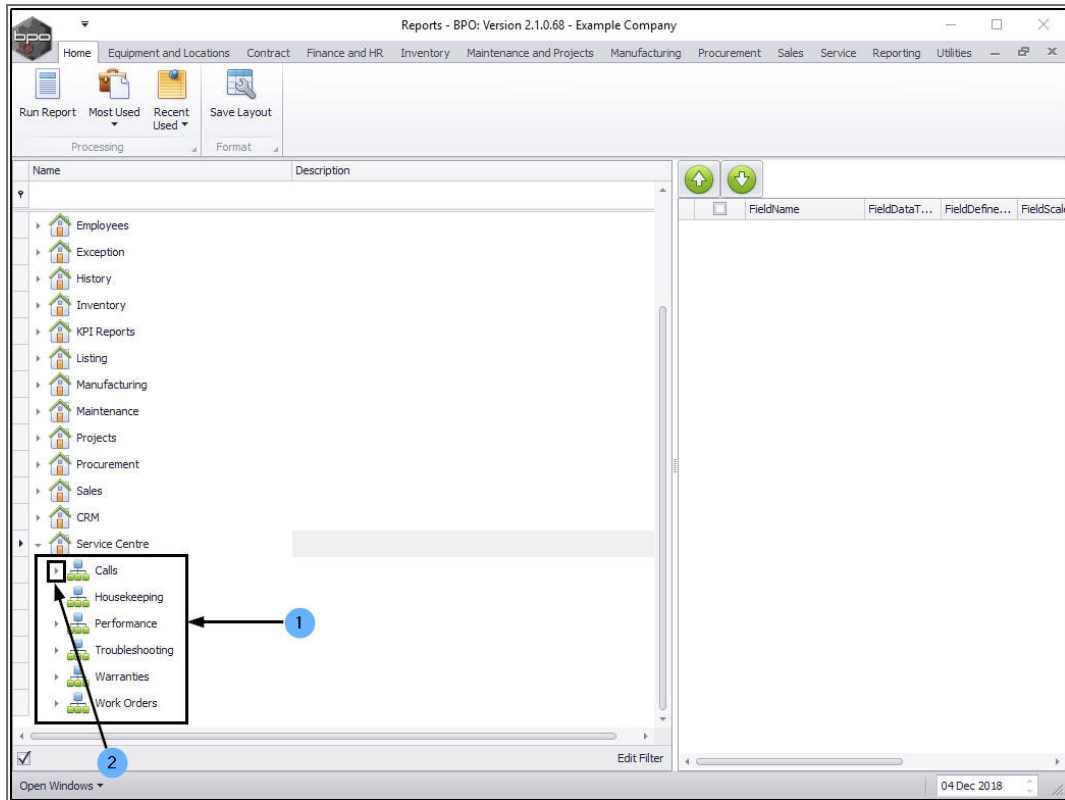


BROWSE FOR A REPORT

1. You can browse the tree view as you usually would in **BPO View Reports** or as in BPO_Explorer , by clicking on the **tree view node** in front of the selected **Report Type**.
2. In this image, **Service Centre** has been selected.



1. The **first** layer of the selected report sub types will be displayed.
2. Click on the **tree view node** in front of the selected report sub type.
 - In this image, **Calls** has been selected.



1. The **second** layer of sub-reports will be displayed.

You can **Run** a report from here:

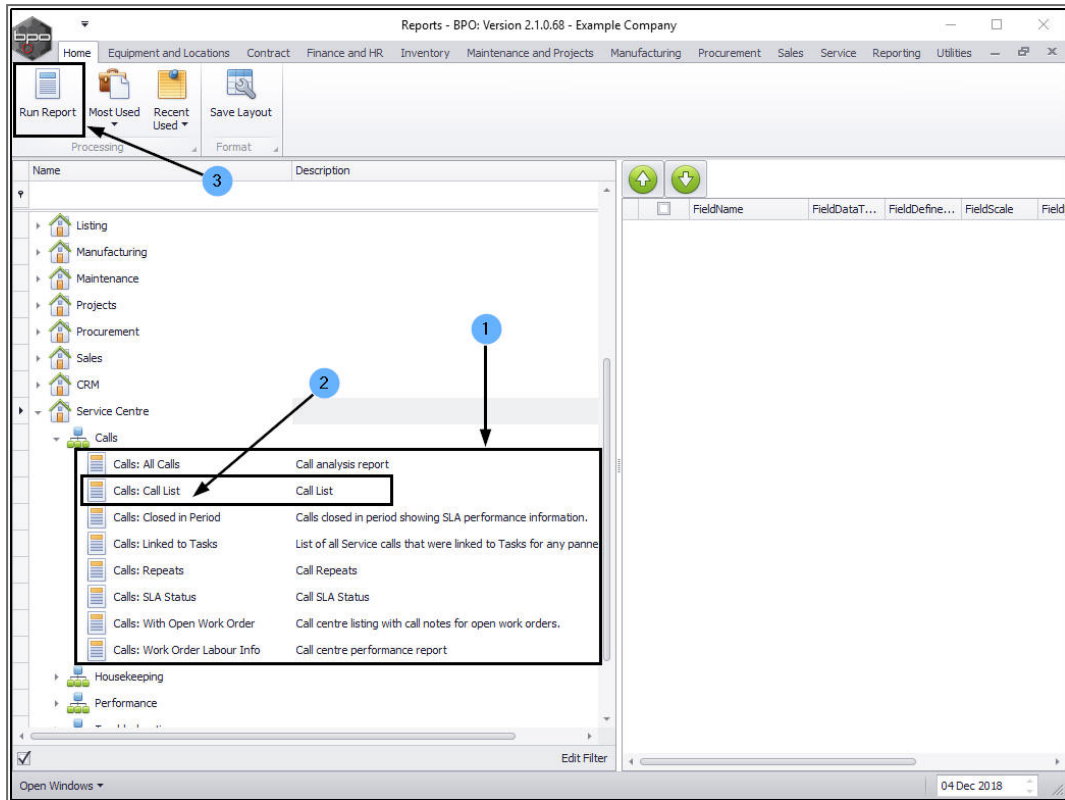
2. Click on the selected report.
 - In this example, **Call List** has been selected.

Either,

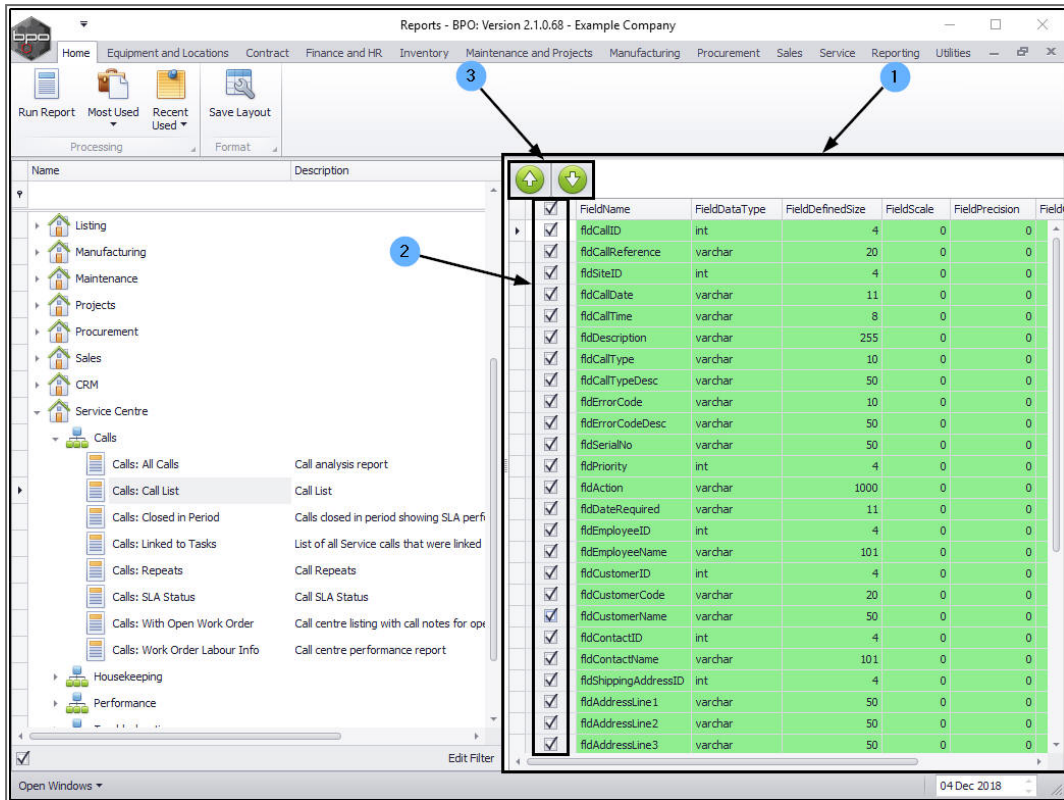
3. **Double click** on the report.

or,

Click on the report, then click on **Run Report**.



1. As you select a report, the **right hand side** of the screen will be populated with all the columns that are available to be displayed in that report.
2. You can also configure the report columns by selecting the relevant **check box(es)** in front of the columns you wish to be displayed in the report.
3. You can use the **directional arrows** to move the columns **up** and **down** depending on where they should be viewed on the report.

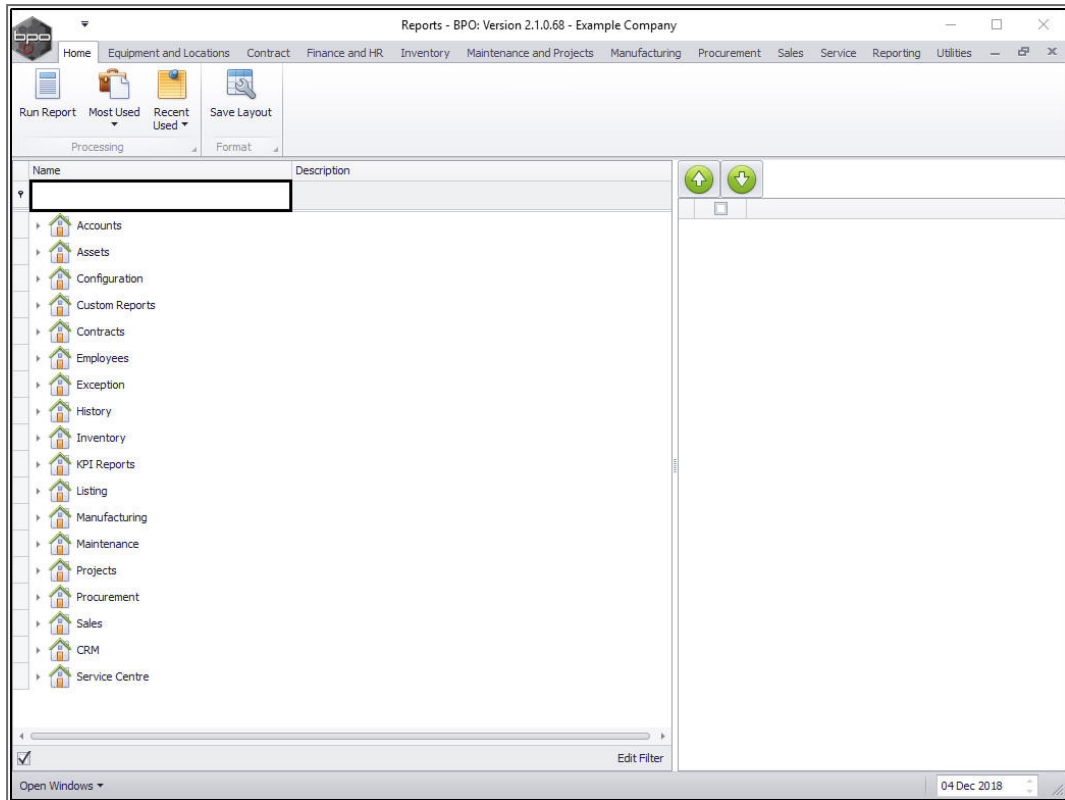


SEARCH FOR A REPORT

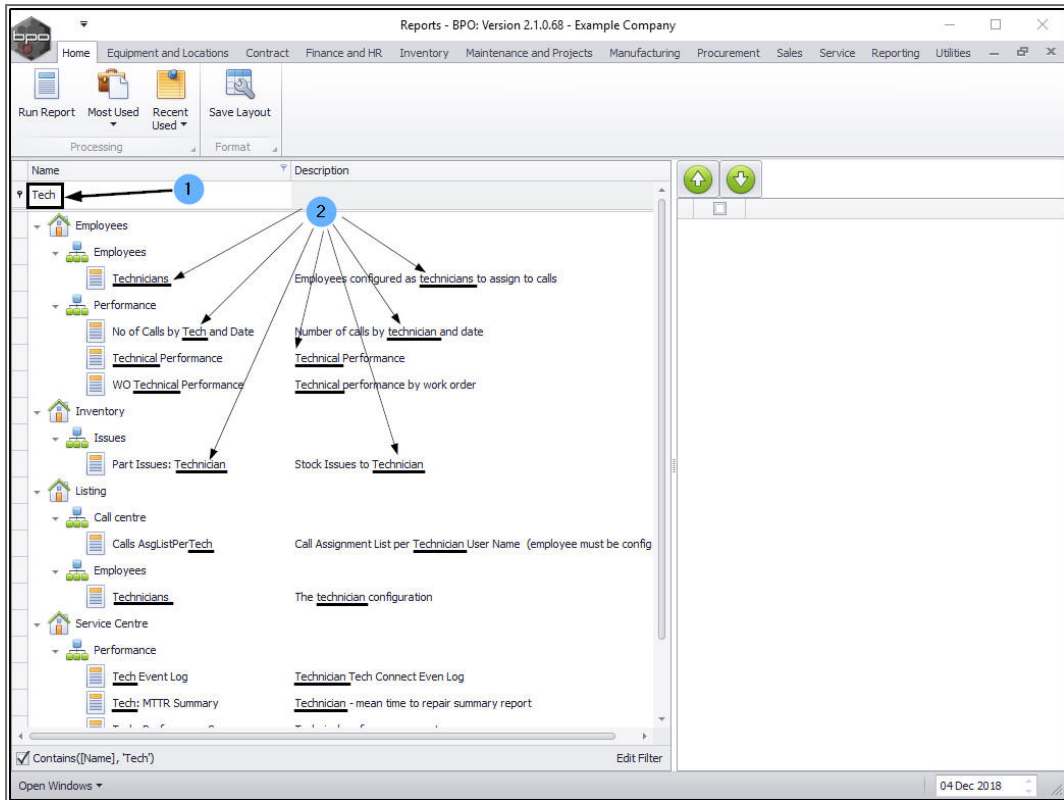
If you are not sure which report you are looking for, you can now search by **Report Name** or **Report Description**.

SEARCH BY REPORT NAME

- Click on the **Name** field and type in what you are looking for.

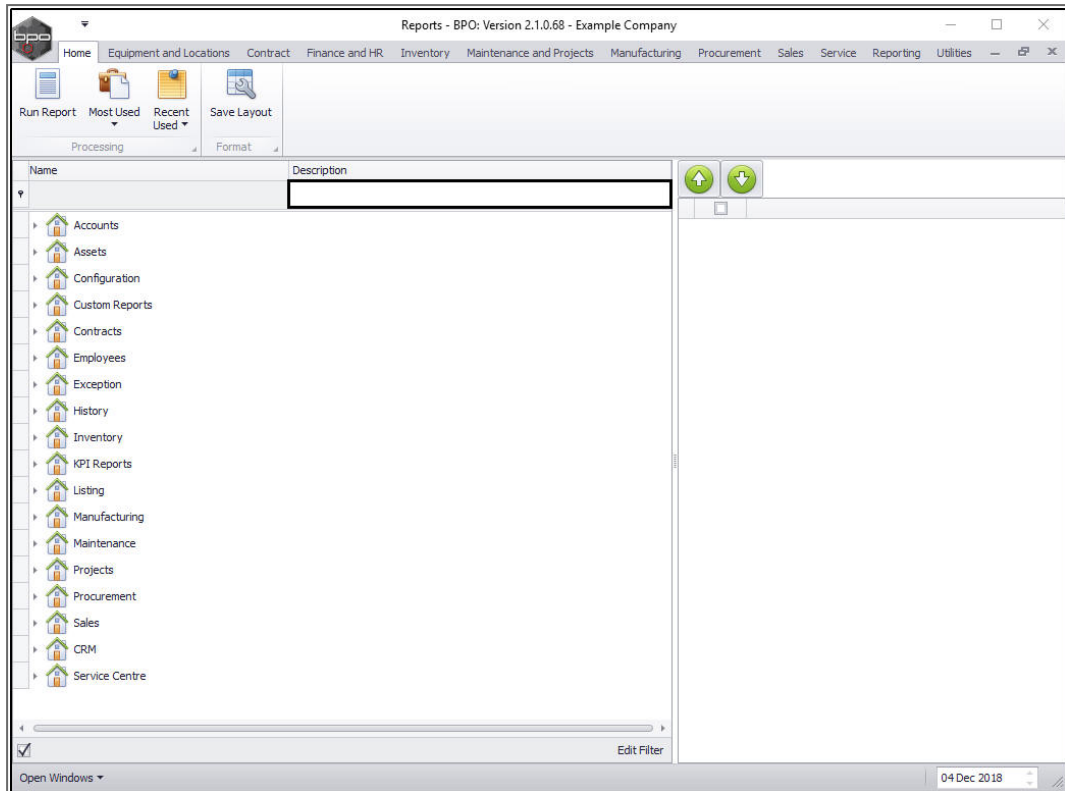


1. In this example I've done a search for all reports that have '**Tech**' in the Report Name.
2. The system has pulled up all the reports that contain the word '**Tech**'.

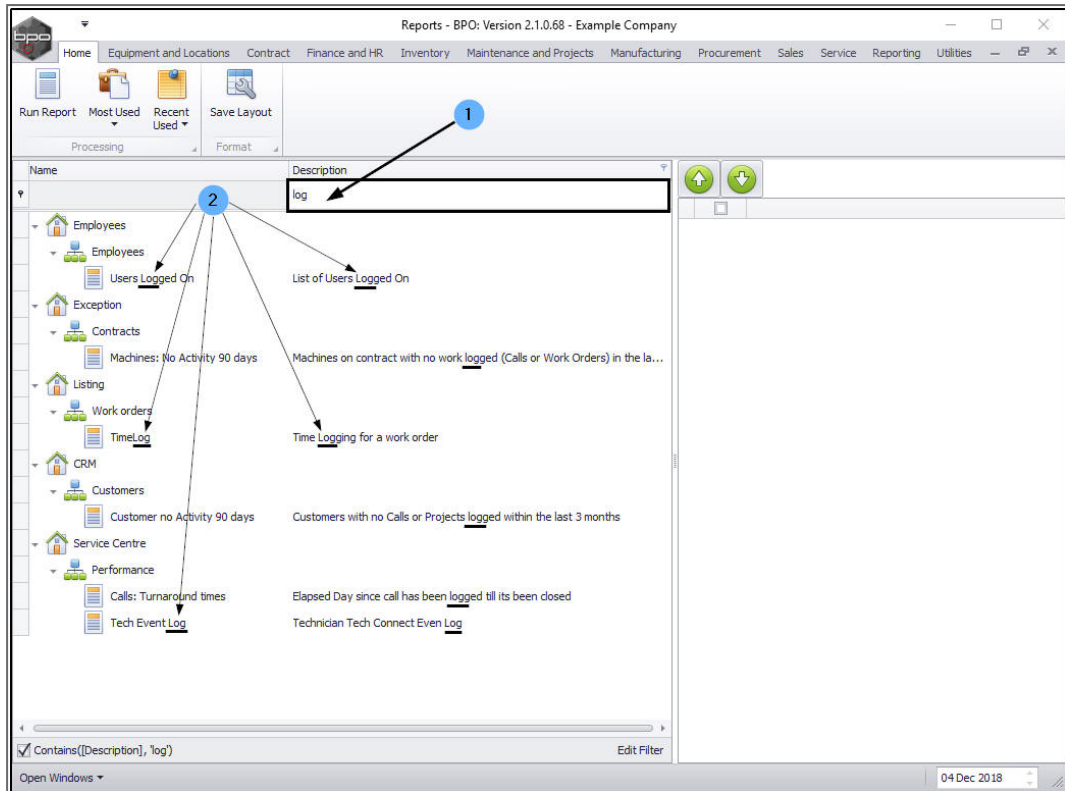


SEARCH BY REPORT DESCRIPTION

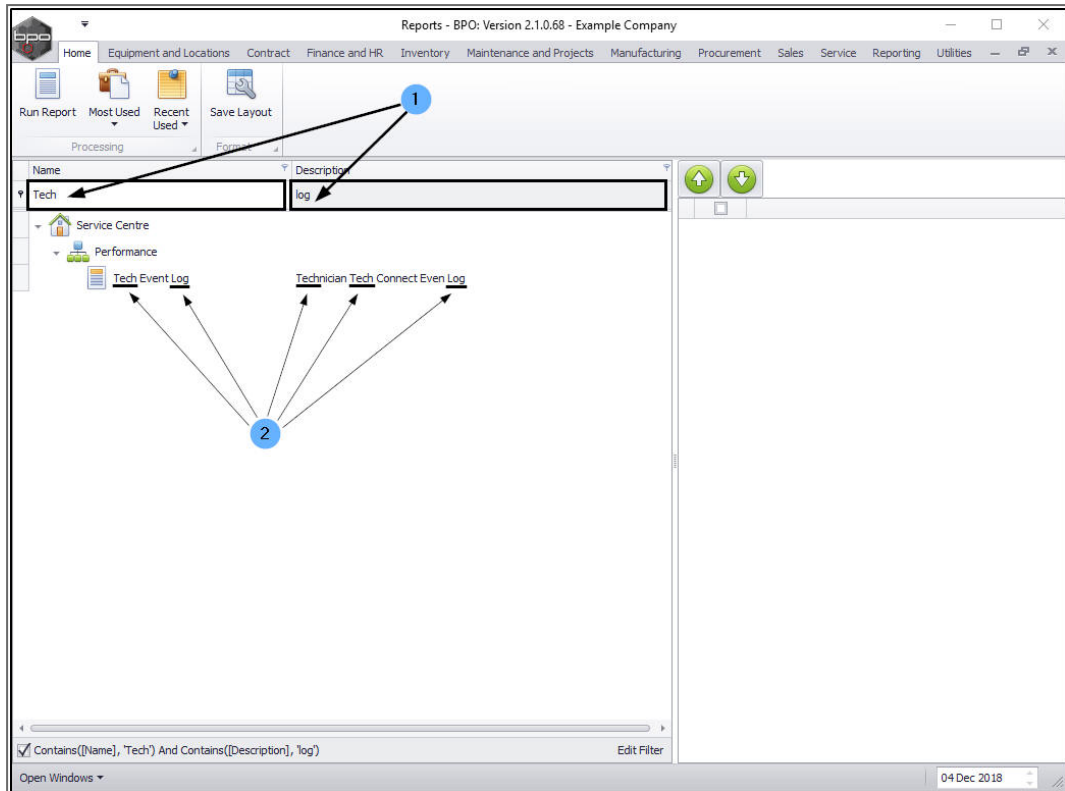
- Click on the **Description** field and type in a description of what you are looking for.



1. In this example I've done a search for all reports that have **'log'** in the Report Description.
2. The system has pulled up all the reports that contain **'log'**.



1. In this example, I have done a search for all reports that have **'Tech'** in the **Report Name**, and **'Log'** in the **Report Description**.
2. The system has pulled up all the reports that contain both **'Tech'** and **'log'**.



RUN A REPORT

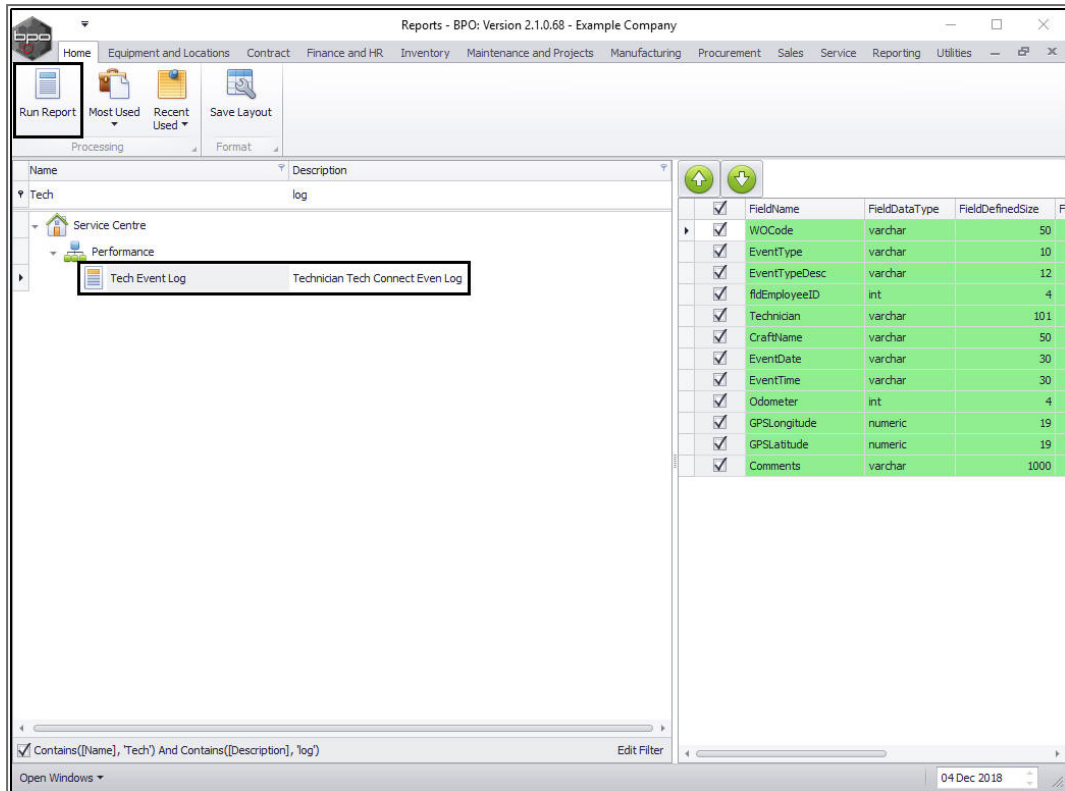
Once you have browsed for or searched for your report,

Either,

1. **Double click** on the report.

or,

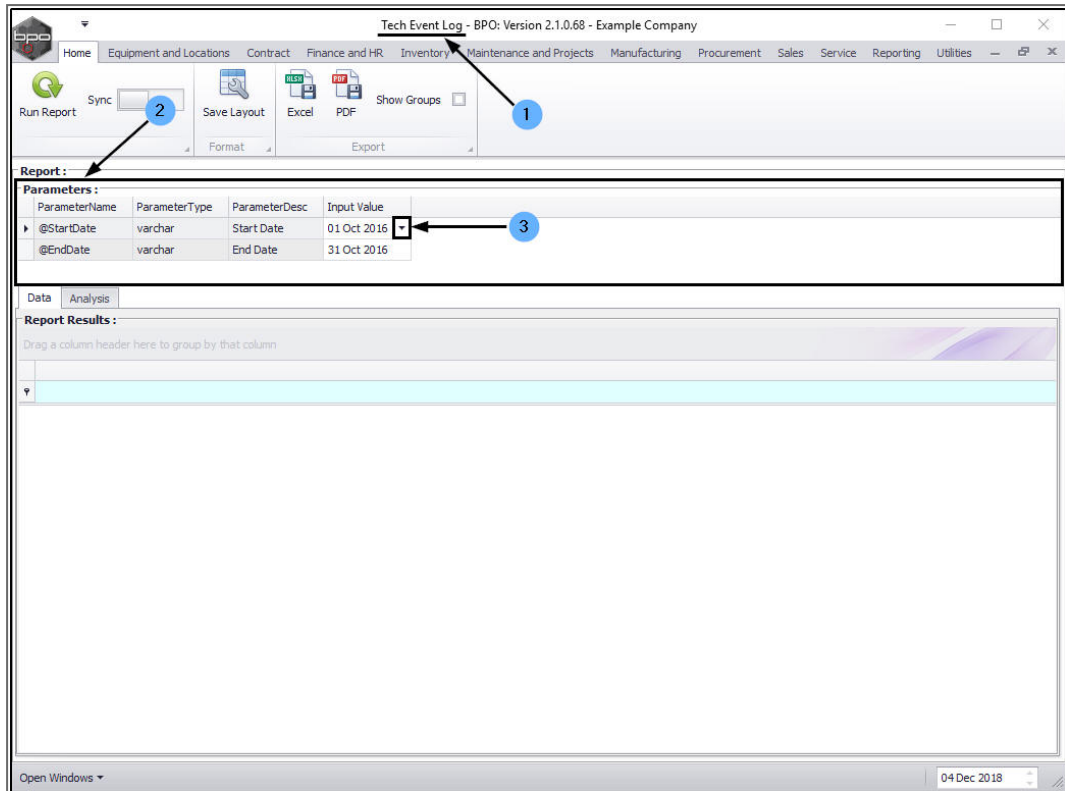
2. Click on the report, then click on **Run Report**.



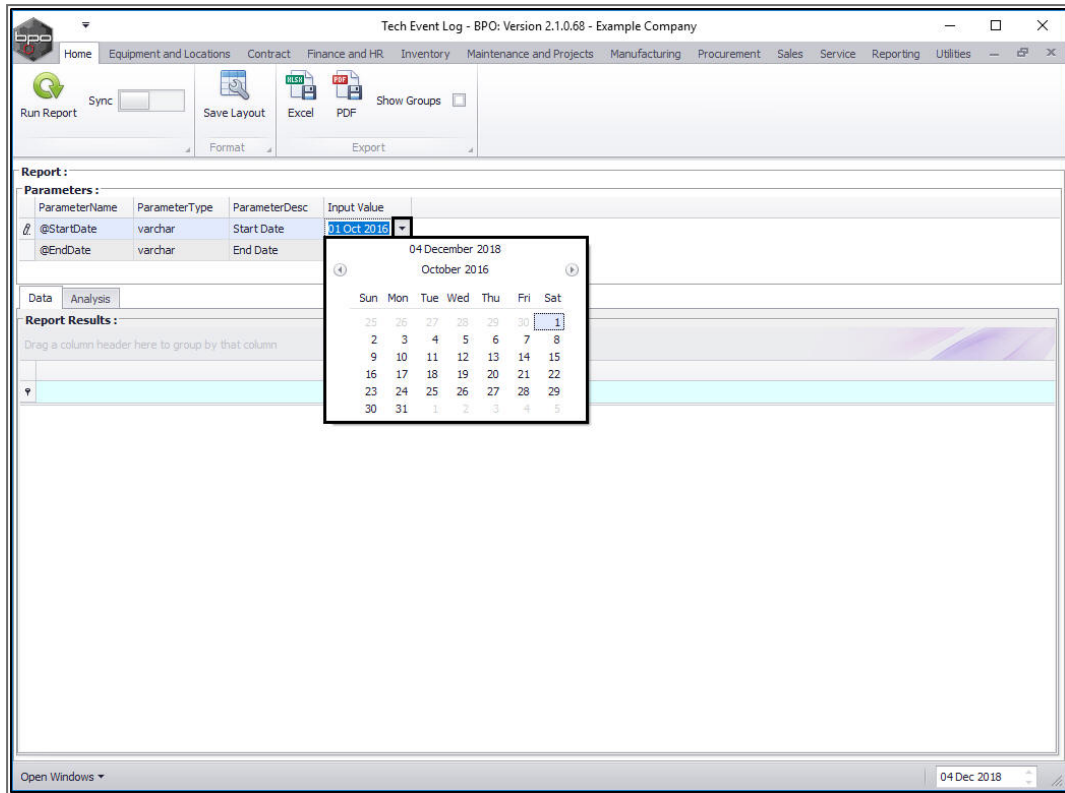
1. The **title** of the screen that opens will be dependant on the report that has been selected in the previous step. In this example, the **Tech Event Log** report was selected and this title is displayed in this screen.

SELECT REPORT PARAMETERS

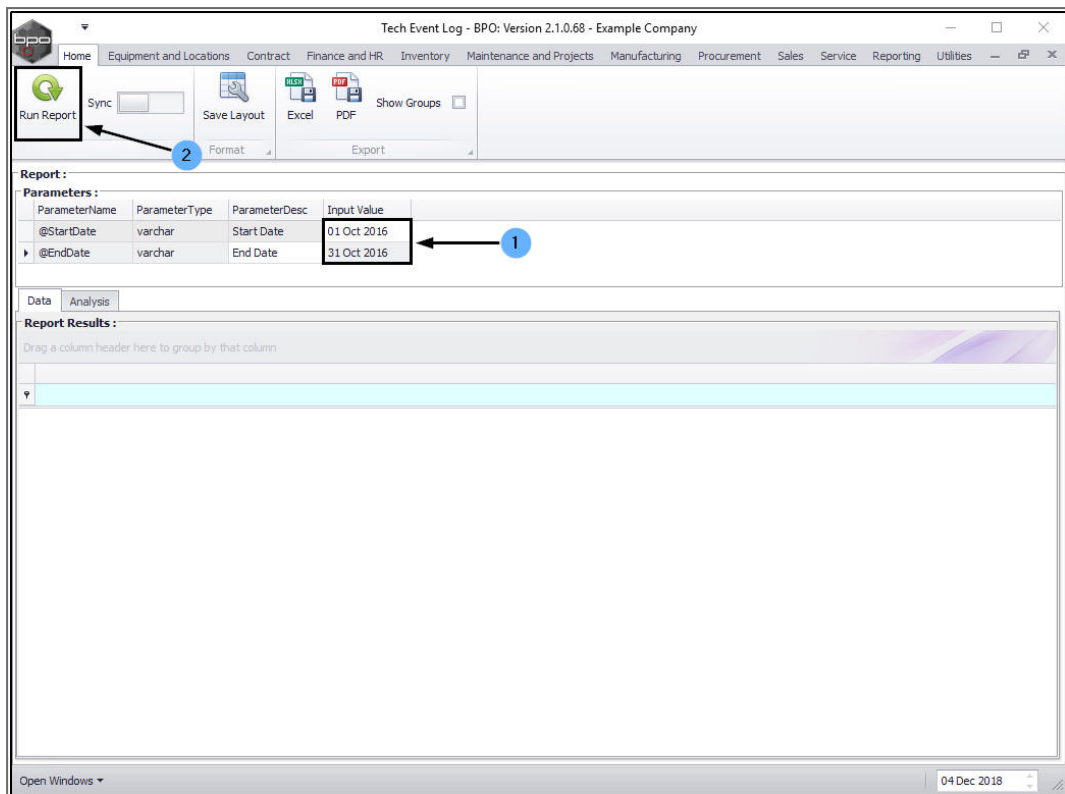
2. This report may require parameters, such as **Start** and **End Date**.
3. If so, ensure that these parameters are filled in. Click on the **drop-down arrow** in the **Start** (or **End**) date field.



- The **calendar** function will be displayed. Select the dates you wish to set for the parameters.



- Once you have selected the parameters (if required),
- Click on ***Run Report***.



The **Report Results** frame will now populate with the report information.

Once the report has run, you can do any of the following:

FILTER THE REPORT

- **Filter / Group** the report to view the results on screen. You can refer to the same processes used in BPO Explorer:
 - [Removing/Selecting Columns](#)
 - [Grouping & Filtering Data](#)
 - [Export Report](#)
 - [Select & Copy Data](#)
 - [Pivot Charts](#)

The screenshot displays the 'Tech Event Log - BPO: Version 2.1.0.68 - Example Company' application window. The interface includes a navigation menu at the top with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with buttons for Run Report, Sync, Save Layout, Excel, PDF, and Show Groups. The main area is divided into two sections: 'Report Parameters' and 'Report Results'.

Report Parameters:

ParameterName	ParameterType	ParameterDesc	Input Value
@StartDate	varchar	Start Date	01 Oct 2016
@EndDate	varchar	End Date	31 Oct 2016

Report Results:

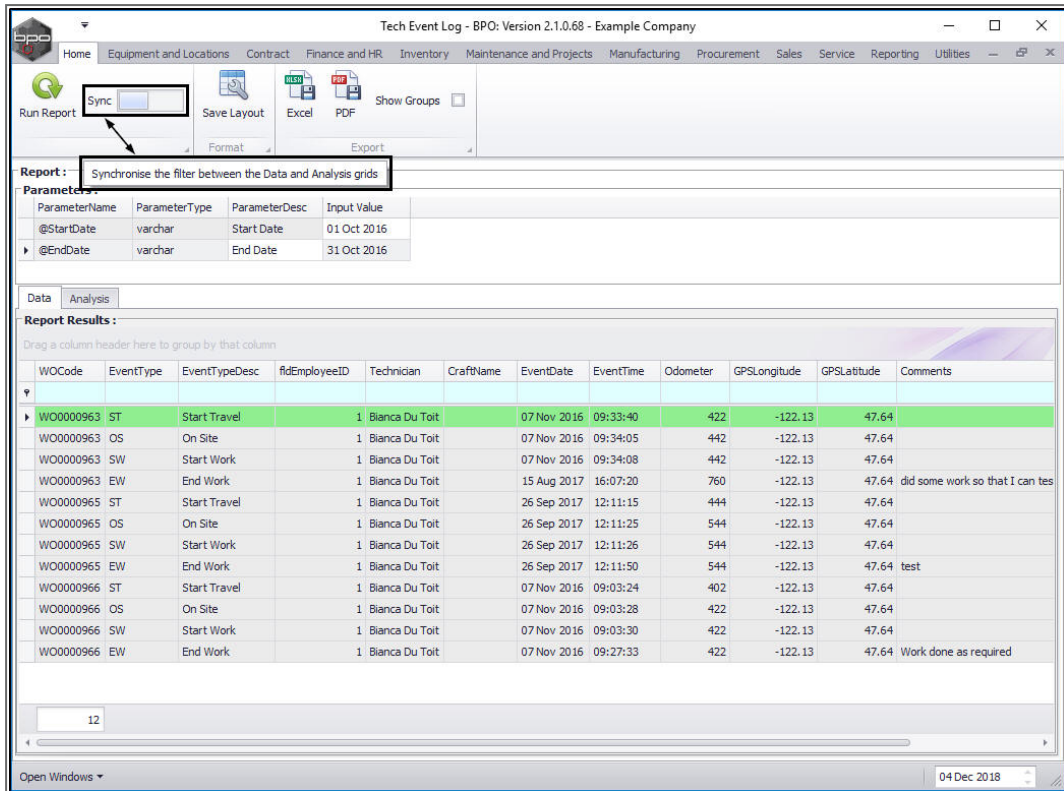
Drag a column header here to group by that column

WOCODE	EventType	EventTypeDesc	fldEmployeeID	Technician	CraftName	EventDate	EventTime	Odometer	GPSLongitude	GPSLatitude	Comments
WO0000963	ST	Start Travel	1	Blanca Du Toit		07 Nov 2016	09:33:40	422	-122.13	47.64	
WO0000963	OS	On Site	1	Blanca Du Toit		07 Nov 2016	09:34:05	442	-122.13	47.64	
WO0000963	SW	Start Work	1	Blanca Du Toit		07 Nov 2016	09:34:08	442	-122.13	47.64	
WO0000963	EW	End Work	1	Blanca Du Toit		15 Aug 2017	16:07:20	760	-122.13	47.64	did some work so that I can tes
WO0000965	ST	Start Travel	1	Blanca Du Toit		26 Sep 2017	12:11:15	444	-122.13	47.64	
WO0000965	OS	On Site	1	Blanca Du Toit		26 Sep 2017	12:11:25	544	-122.13	47.64	
WO0000965	SW	Start Work	1	Blanca Du Toit		26 Sep 2017	12:11:26	544	-122.13	47.64	
WO0000965	EW	End Work	1	Blanca Du Toit		26 Sep 2017	12:11:50	544	-122.13	47.64	test
WO0000966	ST	Start Travel	1	Blanca Du Toit		07 Nov 2016	09:03:24	402	-122.13	47.64	
WO0000966	OS	On Site	1	Blanca Du Toit		07 Nov 2016	09:03:28	422	-122.13	47.64	
WO0000966	SW	Start Work	1	Blanca Du Toit		07 Nov 2016	09:03:30	422	-122.13	47.64	
WO0000966	EW	End Work	1	Blanca Du Toit		07 Nov 2016	09:27:33	422	-122.13	47.64	Work done as required

The interface also shows a 'Data' and 'Analysis' tab at the top of the results section, a page number '12' at the bottom, and a date '04 Dec 2018' in the bottom right corner.

SYNC THE REPORT

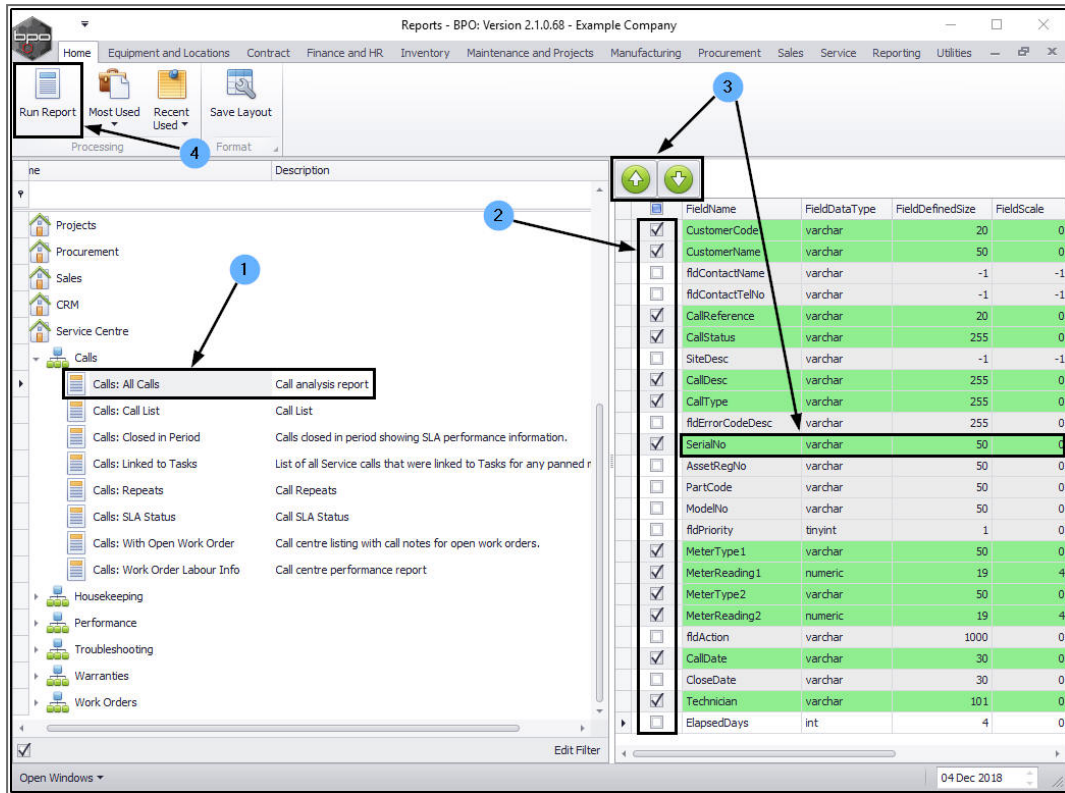
- If you have applied any filters to your report, you can select to ***Sync the filter between the Data and Analysis grids*** (to view the same reports in your pivot chart).



PRE-DEFINE AND RE-ORDER THE REPORT COLUMNS

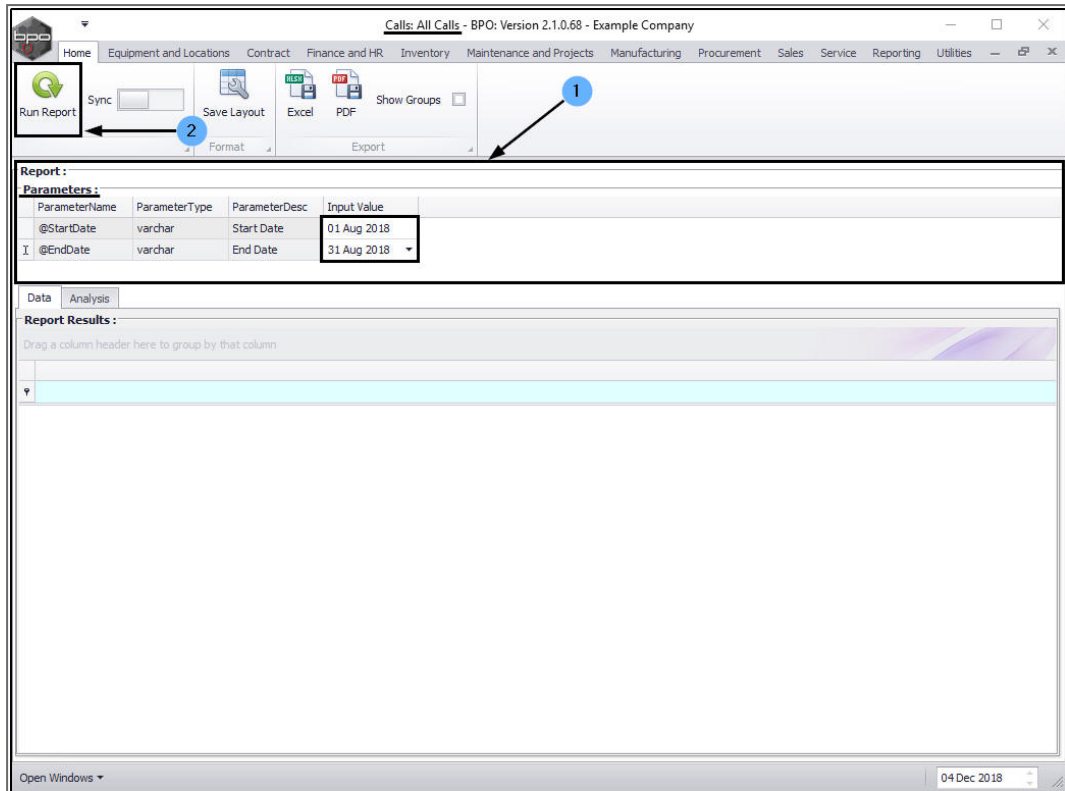
In the *Reports* listing screen,

1. [Browse](#) for or [Search](#) for a Report.
 - In this example, the *Call Analysis Report* has been selected.
2. Make sure only the columns that you wish to view in this report are *checked*.
3. If you wish to change the order of the columns, then click anywhere in the row of the column you wish to move, and use the *directional arrows* to move the column up or down.
4. Click on *Run Report*.



The selected report screen will be displayed with the relevant **title**. In this example: **Calls: All Calls**

- Change the report **parameters** if required.
- Click on **Run Report**. This will save all your changes to the report structure.



The **Report Results** frame will now populate with the report information.

1. In this example the **Report Results** frame is only displaying the columns selected in the previous step.
2. You can view and/or work with this report as required. When you are done, **close** the report.

Report Parameters:

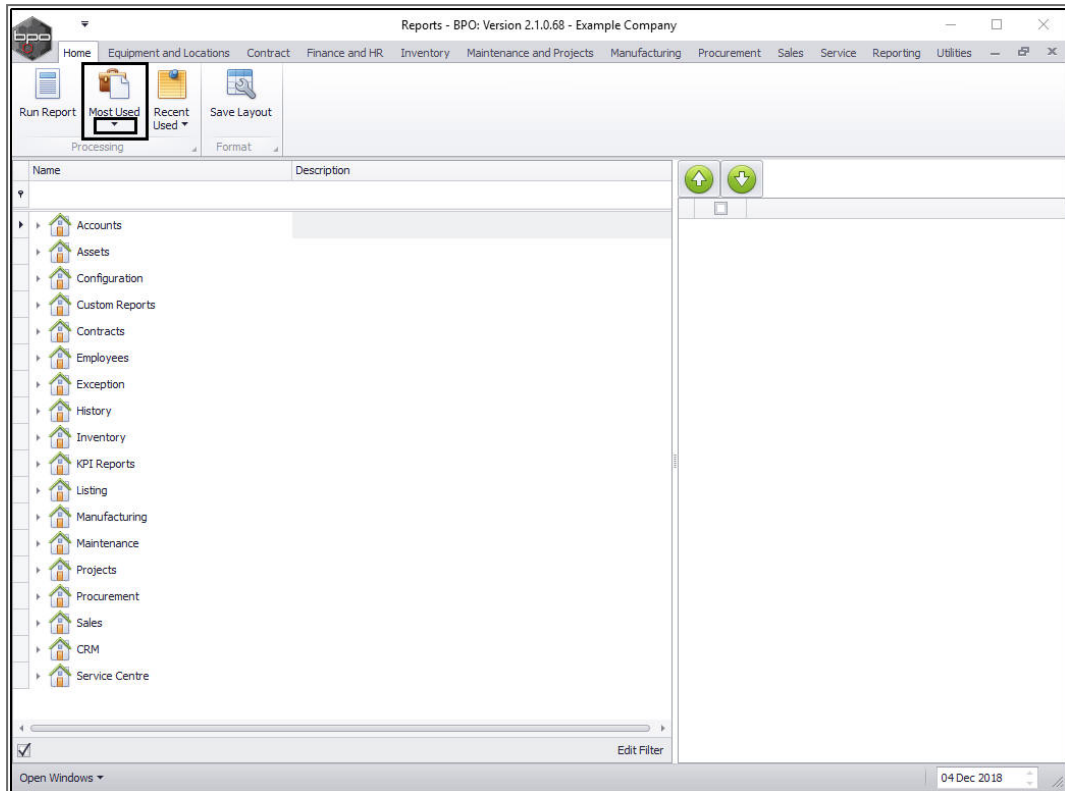
ParameterName	ParameterType	ParameterDesc	Input Value
@StartDate	varchar	Start Date	01 Aug 2018
@EndDate	varchar	End Date	31 Aug 2018

Report Results:

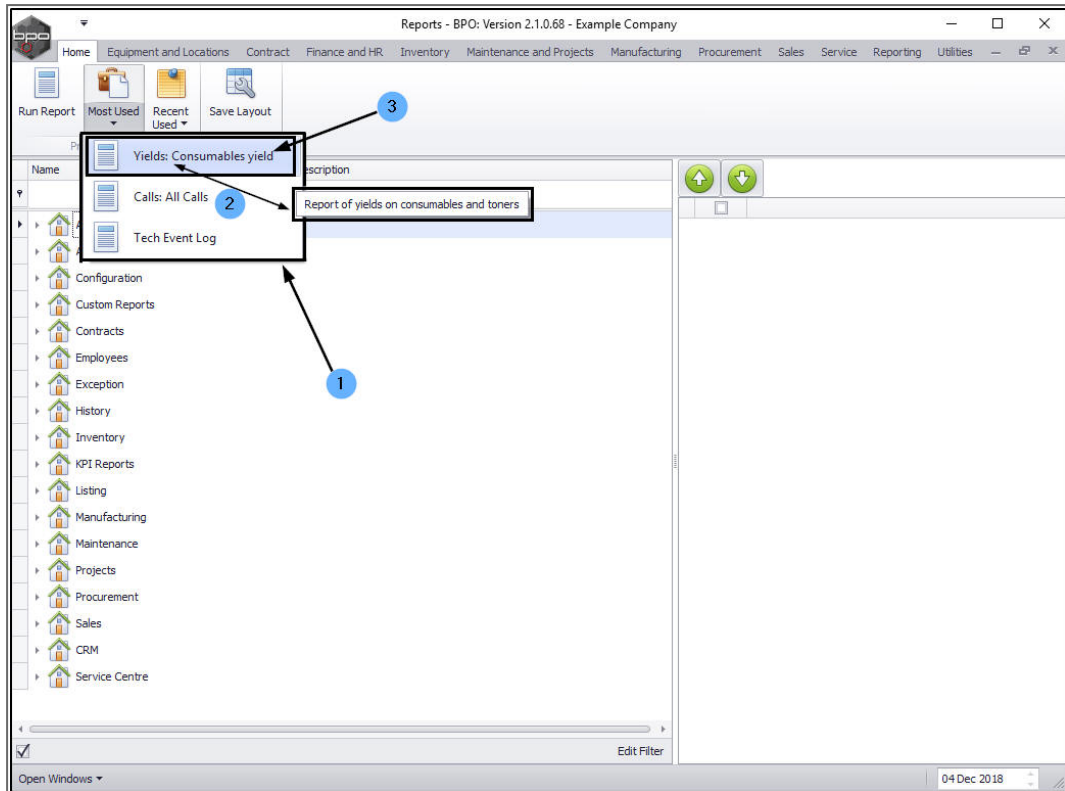
CustomerCode	CustomerName	CallReference	CallStatus	CallDesc	CallType	SerialNo	MeterType1	MeterReading1	MeterType2	MeterReading2	CallDate	Technician
HOP001	Hope Works	CN0000582	New	TT009 - Daily...	Scheduled...	2020-103053		0.00		0.00	07 Aug 2018	Belinda Sharman
HOP001	Hope Works	CN0000581	New	TT011 - Daily...	Scheduled...	test121212		0.00		0.00	07 Aug 2018	Belinda Sharman

VIEW MOST USED REPORTS

- In the **Reports** listing screen, click on the arrow in the **Most Used** button.

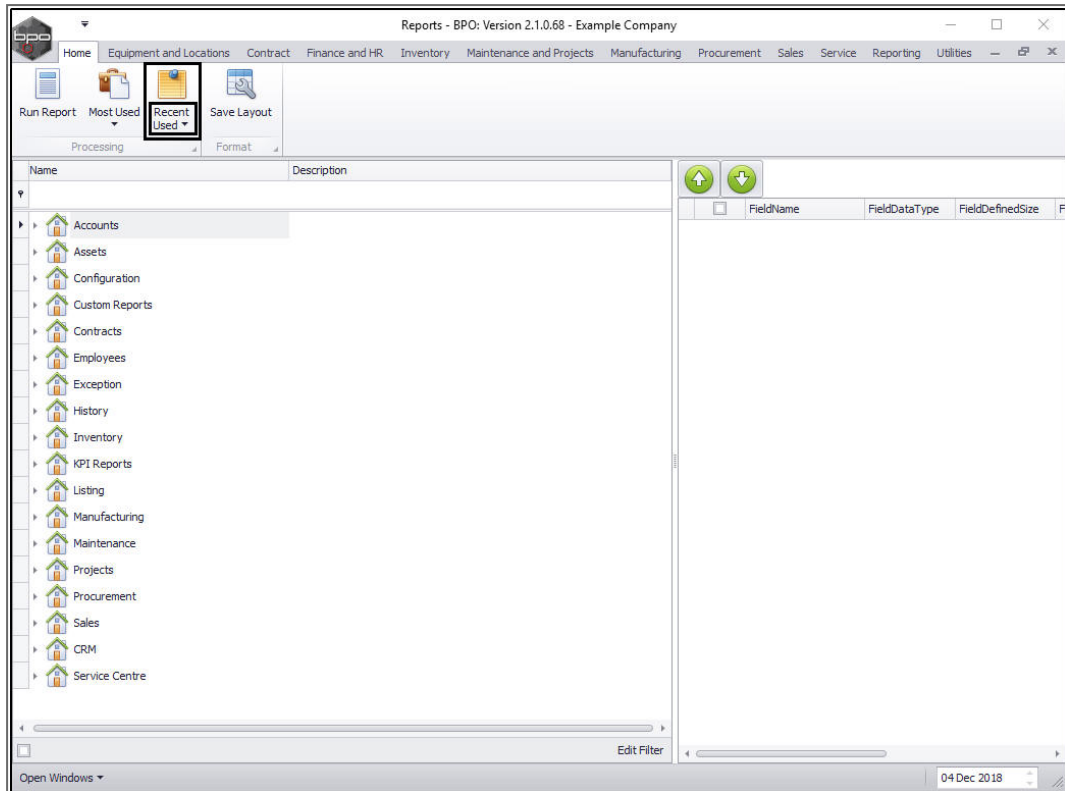


1. This will bring up a list of the reports that you use **most frequently**.
2. If you hover on the report name, you will see a **tooltip text box** will pop up with the description of the report.
3. Click on the required **report name** in the list to run it.

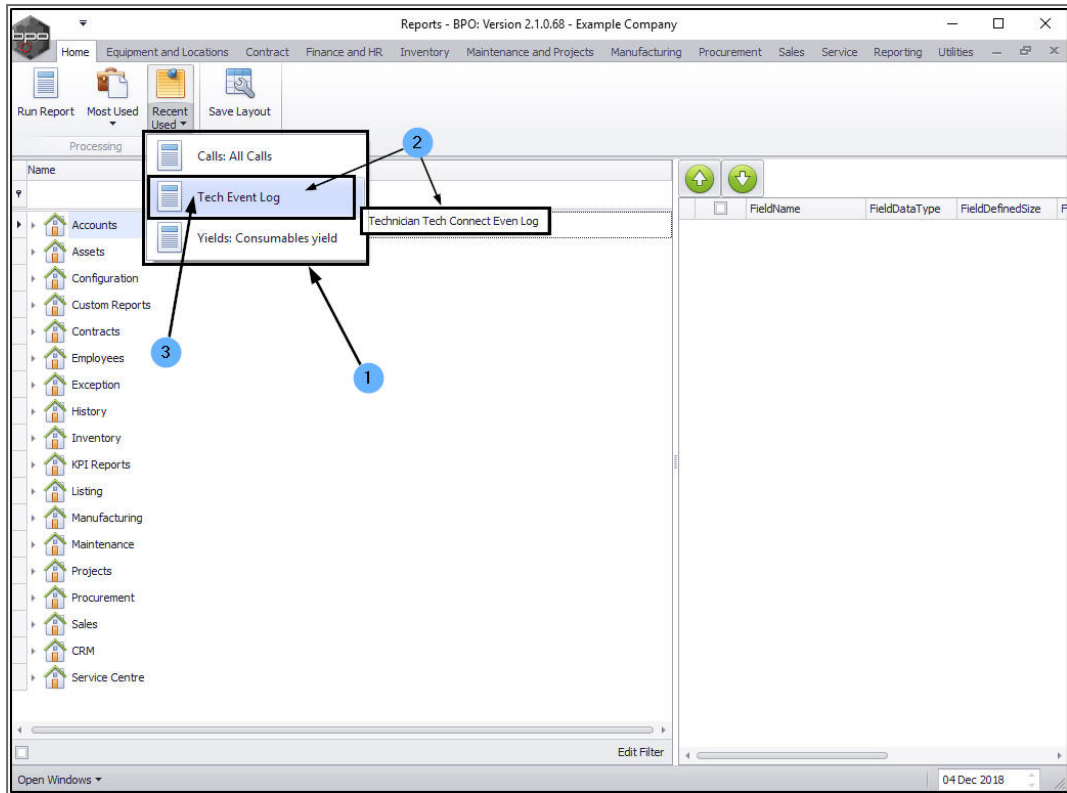


VIEW RECENTLY USED REPORTS

- In the **Reports** listing screen, click on the arrow in the **Recent Used** button.



1. This will bring up a list of the reports that you have used **most recently**.
2. If you hover on the report name, you will see a **tooltip text box** will pop up with the description of the report.
3. Click on the required **report name** in the list to run it.



BPO2.004.001