

TORQUE
SOFTWARE



FMCS USER GUIDE

Report Builder

FMCS Version 5.5 to 5.6

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INTRODUCTION

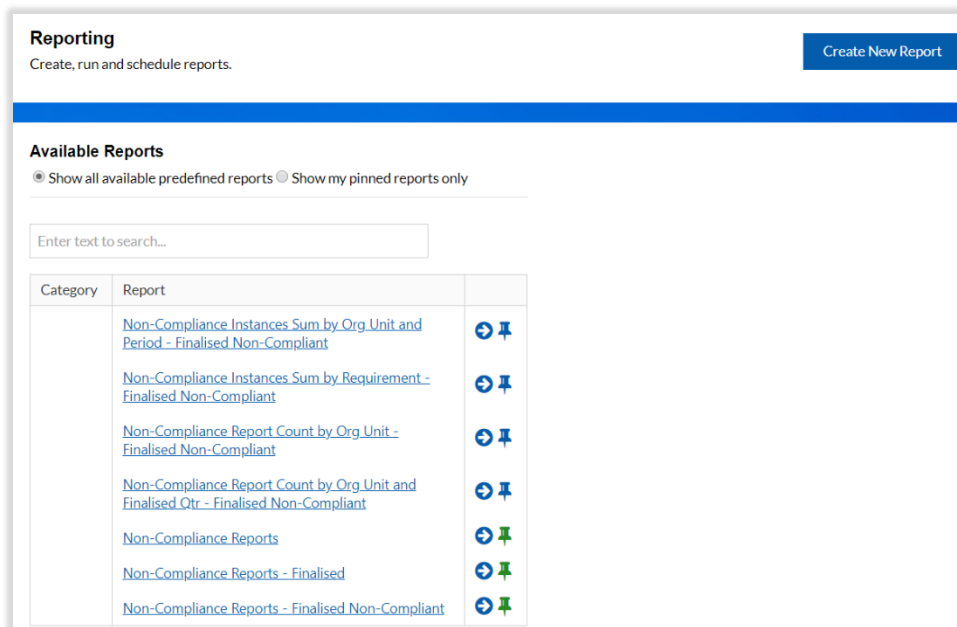
The report builder allows the design of many different types of reports, including pivot style and trend analysis reports. Users can select from predefined report designs or create new reports for their own use. Any user may select or create new report designs. Report designs can be saved, copied and shared. Reports can be viewed on screen or exported to PDF or Excel.

Reports obtain information from datasets. Each dataset is a set of information related to a function. Datasets only contain the information a user has permission to view.

Report design allows the required fields to be selected, filtered, grouped, sorted and summed/counted.

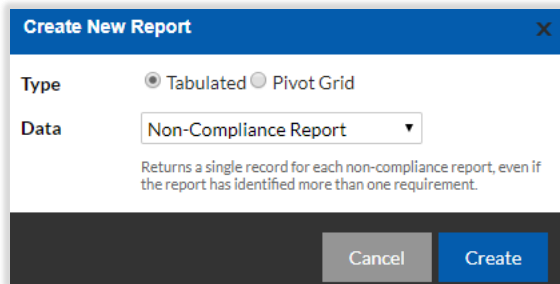
CREATING AND RUNNING REPORTS

To create or run reports, open the Report Builder from the menu system (usually from the Report menu item) or by selecting Alt M and finding "Reports Builder".



Creating New Reports

Select the Create New Report button to create a report. This will allow you to create a new report with complete control over the design.



Select the type of report and the required dataset.

Report Types

There are two types of reports.

Tabulated

Tabulated reports are like an Excel spreadsheet and list records which can then be sorted, grouped and filtered.

Pivot Grid

Pivot grid reports allow data to be summarised, supporting dashboard and trend analysis style reports.

Datasets

A dataset is a set of information related to a function such as Non-Compliance or Entertainment. Once a dataset has been selected, a brief description of the contents is displayed.



Note: Datasets only contain the data you have permission to view. Unless you have permission to view all data, the data displayed in the report will be restricted by your permissions and may not contain all records.

Shared Reports

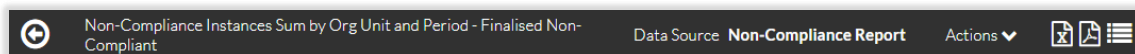
Reports may have been shared with you for your use. Shared reports can be viewed by selecting "Show all available predefined reports". Predefined reports include all reports shared with you and reports you have created yourself. Predefined reports are often created by system administrators and shared with all, or selected users.

Pinned Reports

Pinning reports selects the report to appear on your personal list of reports. To pin/unpin a report select the pin icon next to the report. To view your pinned reports, select "Show my pinned reports only".


DESIGNING REPORTS

Reports may be designed by creating a new report or modifying an existing report. The design process for both tabular and pivot grid report types is similar. However, there are some differences. At the top of the report, the orient strip is displayed.



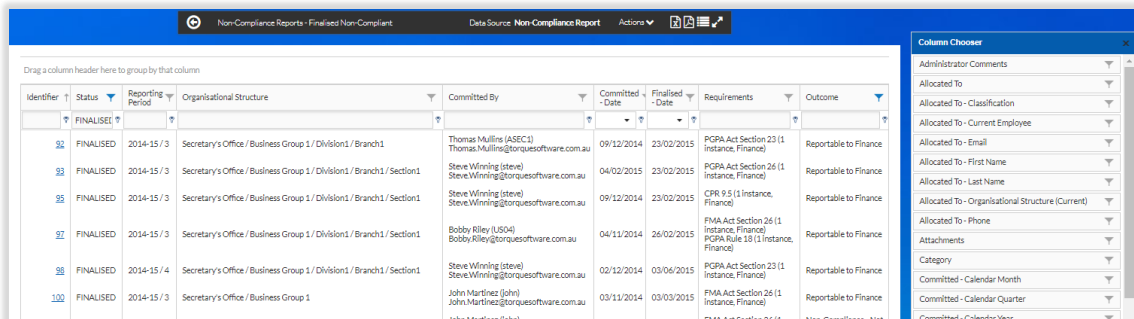
The orient strip displays relevant information and the actions available for the report.

Selecting Fields

Select the fields required for the report from the Column Chooser for tabular style reports or the Pivot Grid Field List for pivot grid style reports. Open the Column Chooser or the Pivot Grid Field List by selecting the Show Field List button in the orient strip .

Tabular Style Reports

To insert a field into the report, drag and drop the field into the report area from the Column Chooser.



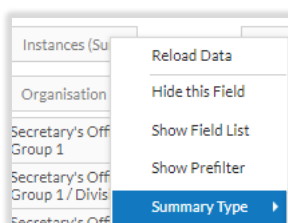
Do the opposite to remove a field from the report.

Pivot Grid Style Reports

Pivot grid fields are dragged from the Hidden Fields list to one of the areas (Data, Column, Row or Filter) on the right of the Hidden Fields list. These areas affect the report as follows;

Data Area

Contains the fields required for summing, counting or other summary operations. The summary type can be changed by right clicking the data field name in the report area and selecting Summary Type.



Column Area

Contains the fields to appear as columns.

Row Area

Contains the fields to appear as rows. These fields will appear on the left side of the report.

Filter Area

Fields required for filtering that have not already been selected in the data, column or row areas.

Deferring Layout Updates

Each time a field is dragged, the report will automatically refresh. However, if there is a large amount of data in the dataset, this may be quite slow. To allow the report to be designed without continually refreshing, check the Defer Layout Update check box. The report will then only refresh when the Update button is selected.

Filtering

Any field can be filtered by clicking on the funnel icon next to the field name. When a filter has been set, the funnel will turn blue.

Tabular reports also allow filters to be set by entering a value in the input area below the field name in each column.


Select the View Filter action from the Actions menu to view all filters currently set. Note: datasets are prefiltered based on the user's permissions. Permission filters are not shown when viewing filters.

Sorting

Fields can be sorted by clicking on the field name. The sort order will cycle between ascending and descending each time the field name is clicked. To sort by more than one field, hold the Shift key down while selecting the second and subsequent sort fields.

Grouping

Grouping is only available in tabular reports. Drag grouping fields into the grouping area on the report. The grouping area is above the field column names.

To expand all the groups in a grouped report, click the Expand/collapse all groups button on the orient strip .

Positioning Fields

Position fields by dragging to the required location.

EXPORTING REPORTS

Reports can be exported to Excel or PDF. Click the required button on the orient strip .

MANAGING REPORTS

Report Information

Contextual information about a report can be updated by selecting the Edit Report Info action from the Actions menu. This allows Category, Name and a Description of the report to be viewed or updated.

Note: only users with edit permission for the report are able update report information.

Saving Reports

Reports can be saved by selecting the Save action from the Actions menu. Saving the report will update the report for all users who share the report. Saving a report only saves the design of the report. The data in the report will be refreshed each time the report is opened.

To save the data in the report for future reference, export the report to PDF or Excel.

Note: new reports can be saved at any time. However, only users with edit permission for the report can save predefined reports.



Copying Reports

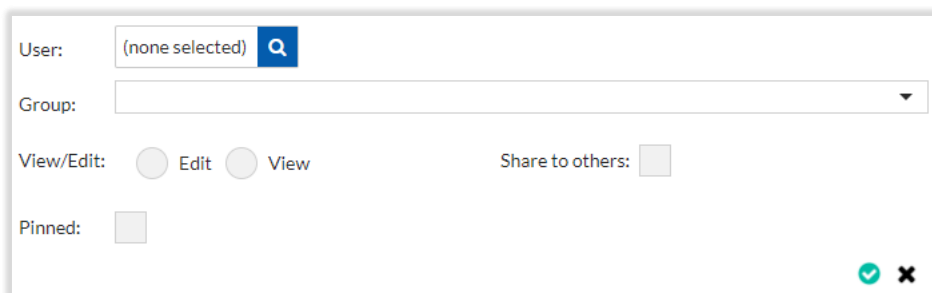
Reports can be copied by selecting the Save As action from the Actions menu. Saving a report only saves the design of the report. The data in the report will be refreshed each time the report is opened.

Sharing Reports

Reports can be shared to other users by selecting the Manager Sharing action from the Actions menu. When a new report is first saved, the current user is automatically given full sharing permission for the report.

Creating New Shares

To create a new share, select the Add  or Copy  buttons.



The screenshot shows a sharing configuration dialog box with the following elements:

- User:** A search input field containing "(none selected)" and a magnifying glass icon.
- Group:** A dropdown menu.
- View/Edit:** Two radio buttons labeled "Edit" and "View".
- Share to others:** A checkbox.
- Pinned:** A checkbox.
- Bottom right:** A green checkmark icon and a red 'x' icon.

Select the user or group who the report is being shared with. Note: only users with Report Administration permission may share to groups.

Select if the shared user(s) have view or edit permission. Edit permission allows the shared users to make and save changes to the report design.

Select if the shared user(s) can share the report to other users.

Select if the report will be automatically pinned to the shared users' pinned report list.


Select the green tick to save the share.

Note: only users with permission to Share to others can share the report.

Editing Shares

Existing shares may be edited by selecting the edit  button next to the share.

Deleting Shares

Shares may be deleted by selecting the delete  button next to the share.

Deleting Reports

Reports can be deleted by selecting the Delete action from the Actions menu. Deleting the report will delete the report for all users who share the report.

Note: only users with edit permission for the report can delete reports.

REPORT BUILDER CONFIGURATION

Report Administrator Permission

Users with report administrator permission have full permission to all report designs, irrespective of any explicit shares, and can share reports to groups.

The group of people who have report administration permission is set by the system administrator. To set the report administration group, find System Settings in the menu system or select Alt M and find "Administration - System Settings", then select the Permissions / Workflow tab and set the Report Administrators group. Note: the default Report Administrators group is "Report Administrators". The Report Administrators group contains the System Administrators group by default.

Report Builder Menu Item

The menu item to access the report builder is configured by the system administrator. Select "System" as the Type and "Reports Builder" as the System Function.

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