

TORQUE
SOFTWARE



LIGHTHOUSE USER GUIDE

Report Builder

Version 6.0.6

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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".

Reporting
Create, run and schedule reports. Create New Report

Available Reports
 Show all available predefined reports Show my pinned reports only

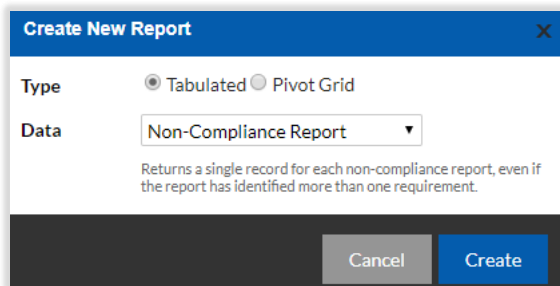
Enter text to search...

Category	Type	Dataset	Report	Description	
	Tabulated	Contingent Liabilities	Contingent Liability		
	Tabulated	Credit Card Requests	Credit Cards - Limit Change		
	Tabulated	Credit Card Requests	Credit Cards - New		
	Tabulated	Driver Registrations	Driver Registration		
	Tabulated	Fleet Vehicle Private Use	Fleet Vehicle Private Use		
	Tabulated	Gifts/Benefits	Gifts/Benefits		
	Tabulated	Home Garaging Arrangements	Home Garaging		
	Pivot Grid	Non-Compliance Requirement	Non-Compliance Current Year By Requirement		
	Tabulated	Non-Compliance Report	Non-Compliance Reports		
	Tabulated	Entertainment Applications	Official/Business Hospitality		

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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

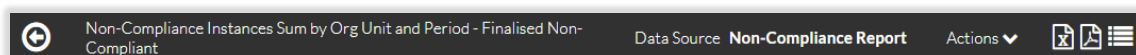
Pinning reports selects the report to appear on your personal list of reports. To pin/unpin a report select the pin icon next to the report. To view your pinned reports, select "Show my pinned reports only".

Refreshing Report Data

When a report is first opened, a snapshot of the data in the report is taken at the time of opening the report. The data snapshot will be used during manipulation of the report to improve response time. However, to obtain the latest version of the data at any time, perform the Refresh Data action in the actions menu.

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.

Fields


The fields available in a report will depend on the dataset the report is based on. A report must contain at least one field.

Tabular Style Reports

Selecting Fields

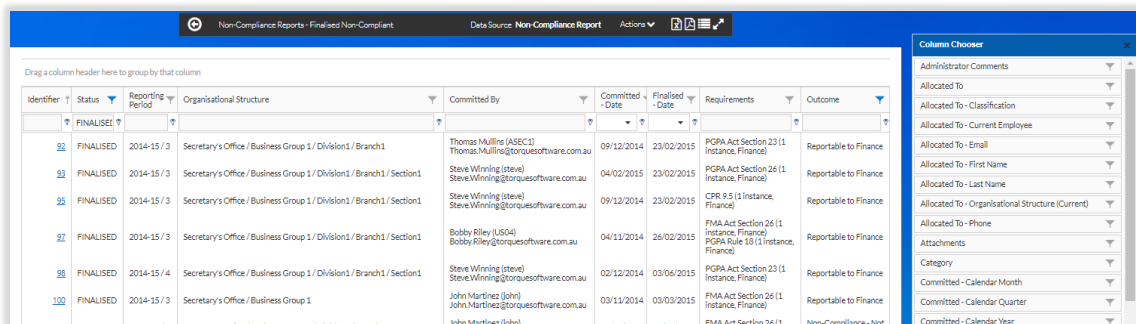
In tabular style reports, the fields to be made available for inclusion in a report are selected by using the Select Fields action. It is important to only select the fields that will be used in the report as increasing the number of fields selected degrades response time when designing forms. When fields are first selected they are automatically added to the end of the report design.

Including Fields

Include the fields required for the report from the Column Chooser for tabular style reports. Open the Column Chooser by selecting the Show Field List button in the orient strip .

Tip: Use the Add All Fields action to add all available fields to a report.

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.



Identifier	Status	Reporting Period	Organisational Structure	Committed By	Committed Date	Finalised Date	Requirements	Outcome
52	FINALISED	2014-15/3	Secretary's Office / Business Group 1 / Division1 / Branch1	Thomas Mullins (ASEC1) Thomas.Mullins@torquesoftware.com.au	09/12/2014	23/02/2015	PCRA Act Section 23 (1 Instance, Finance)	Reportable to Finance
93	FINALISED	2014-15/3	Secretary's Office / Business Group 1 / Division1 / Branch1 / Section1	Steve Winning (steve) Steve.Winning@torquesoftware.com.au	04/02/2015	23/02/2015	PCRA Act Section 26 (1 Instance, Finance)	Reportable to Finance
95	FINALISED	2014-15/3	Secretary's Office / Business Group 1 / Division1 / Branch1 / Section1	Steve Winning (steve) Steve.Winning@torquesoftware.com.au	09/12/2014	23/02/2015	EPR 6.5 (1 Instance, Finance)	Reportable to Finance
97	FINALISED	2014-15/3	Secretary's Office / Business Group 1 / Division1 / Branch1 / Section1	Bobby Riley (US04) Bobby.Riley@torquesoftware.com.au	04/11/2014	26/02/2015	FMA Act Section 26 (1 Instance, Finance) PCRA Rule 18 (1 Instance, Finance)	Reportable to Finance
98	FINALISED	2014-15/4	Secretary's Office / Business Group 1 / Division1 / Branch1 / Section1	Steve Winning (steve) Steve.Winning@torquesoftware.com.au	02/12/2014	03/06/2015	PCRA Act Section 23 (1 Instance, Finance)	Reportable to Finance
100	FINALISED	2014-15/3	Secretary's Office / Business Group 1	John Martinez (john) John.Martinez@torquesoftware.com.au	03/11/2014	03/03/2015	FMA Act Section 26 (1 Instance, Finance)	Reportable to Finance
101	FINALISED	2014-15/4	Secretary's Office / Business Group 1 / Division1 / Branch1 / Section1	John Martinez (john)			FMA Act Section 26 (1 Instance, Finance)	Non-Compliance - Not



Note: Only fields selected in the Select Fields action will be available in the Column Chooser. If additional fields are required, open the Select Fields action and select the additional fields.

Pivot Grid Style Reports

Including Fields

Include the fields required for the report from the Pivot Grid Field List for pivot grid style reports. Open the Pivot Grid Field List by selecting the Show Field List button in the orient strip



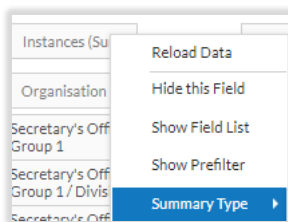
Tip: Use the Add All Fields action to add all available fields to a report.

The screenshot shows a Pivot Grid report titled "Non-Compliance Instances Sum by Org Unit and Period - Finalised Non-Compliant". The report table has columns for reporting periods from 2012/13/4 to 2019/20/1 and a Grand Total column. The rows list various organizational units. To the right, the "PivotGrid Field List" panel is open, showing a list of "Hidden Fields" such as "Administrator Comments", "Allocated To", "Attachments", and "Committed - Calendar Month". These fields can be dragged to the "Filter Area", "Row Area", "Column Area", or "Data Area" on the right side of the panel.

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.

Column Names

Column names may be changed from the default settings by selecting Manage Column Names from the Actions menu. Add as many column name changes as required.

Column name changes may be disabled/enabled by selecting Disable Column Header Override or Enable Column Header Override from the Action menu.

Note: these actions are only available after the report has been saved for the first time.

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.

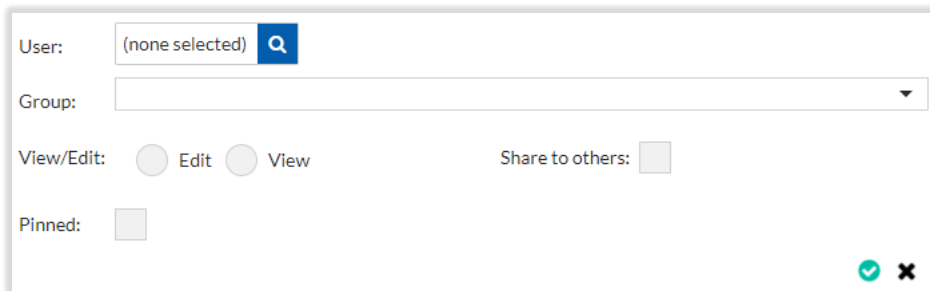
Note: Sharing reports only shares the design of the report. The records in the report will always be restricted by the permissions of the user.

Linking to Reports

Url links to reports are available by selecting View Report URL Links from the Actions menu. These links provide direct access to the report in on-line, Excel and PDF format and may be included in notifications and other documents or emails.

Creating New Shares

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



The screenshot shows a share configuration dialog box with the following fields and options:

- 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.
- At the bottom right, there are two icons: a green checkmark and a red 'x'.

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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