

Version 25



Ad Hoc Query

User Guide

Trade Secret | February 2025

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Technical Support

Trapeze provides several ways to connect with the Customer Care team. Please provide detailed information to the representative. If you are reporting an issue by e-mail, include any error messages, screen shots of your problem, and steps to replicate the issue.

Customer Care is available Monday through Friday, 8:00 a.m. to 8:00 p.m., Eastern Standard Time.

Toll-Free Telephone: 1-877-411-8727

E-mail: cc@trapezegroup.com

FTP Site: <https://ftps.trapezegroup.com/>

Web Site: <https://collaborate.trapezegroup.com>

The website provides access to Trapeze Collaborate which offers resources to implement and operate the software, search knowledge, participate in communities, log/track service requests, sign-up for release alerts, view product health recommendations, and download updates or documentation. For secure access to Collaborate, contact Customer Care through the website or by calling the number above.

Product Compatibility

Refer to the latest [Product Compatibility](#) information on Trapeze Collaborate for requirements including operating system information, databases, Crystal reports, network protocol, HTTP servers and browsers that are supported.

Ad Hoc Query - User Guide

Version 25.x

February 2025

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1. Overview

The Ad Hoc Query module provides secure ad hoc query capabilities. It allows users to build their own queries, format the display of the results, export the results, and save queries for future use and sharing with others.

The Ad Hoc Query module uses screen views as data sources to provide end users with familiarity when querying data. Access to the views is restricted in this module through the same screen and control permissions used by the GUI that limit a user's rights to viewing screens and fields.



Note: Location and department security is not considered at this time by this tool.

This guide provides an overview of the Ad Hoc Query module to create queries and reports.

Requirements

Application 25.x

Web Modules 25.x

Assumptions

This guide assumes familiarity with workflows and configuration of the application.



User defined required fields that do not appear in the Web Modules will return validation messages.



Special characters cannot be placed into the Web Modules fields or unanticipated results may occur. This would include any character that cannot be typed with a standard keyboard.



Do not use the browser's **Back** button in the Web Modules as unanticipated results may occur.



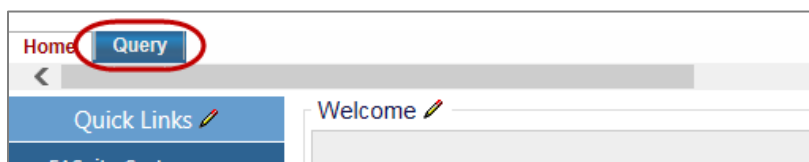
Do not open or use the same instance of the web portals in multiple browser windows or tabs. This can cause errors or unexpected performance issues.

2. Building a Report

- ✓ When converting an Ad Hoc Query for use in the other database, remember that .xml files for Oracle (**EMSDBA**) must be in caps and the .xml files for MSSQL (**emsdba**) must be lower case. Therefore, to get one to work in the other platform, open the xml file and do a find and replace of all instances of [EMSDBA] with [emsdba] or the other way around depending on which direction you are going.

This section outlines how to create a very basic functional report.

1. After logging in to Web Modules, click on the Query tab.

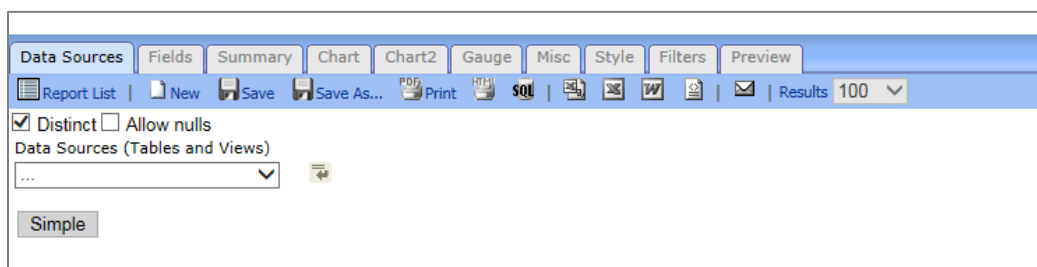


The initial Ad Hoc Query main page displays.

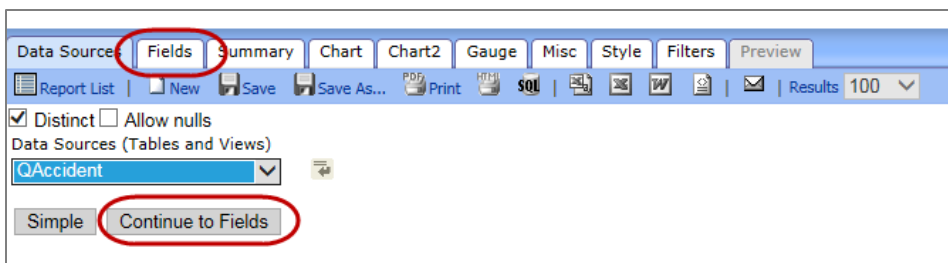
2. Click the **Design a New Report** link.



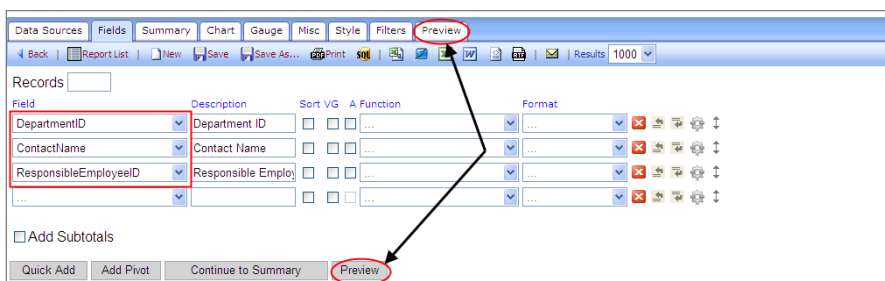
You are taken to the page for designing new reports.



3. Select a report data source in the **Data Sources** tab (the drop-down contains tables and views).
4. Click the **Continue to Fields** button (or click the **Fields** tab).

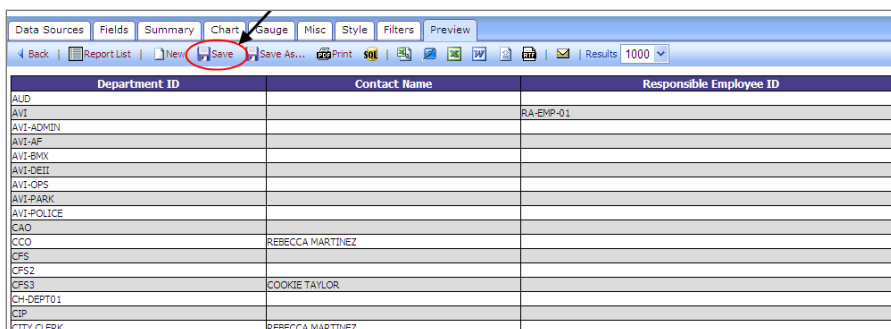


5. Select one or more fields from the **Field** drop-downs and click the **Preview** tab (or select the **Preview** button).

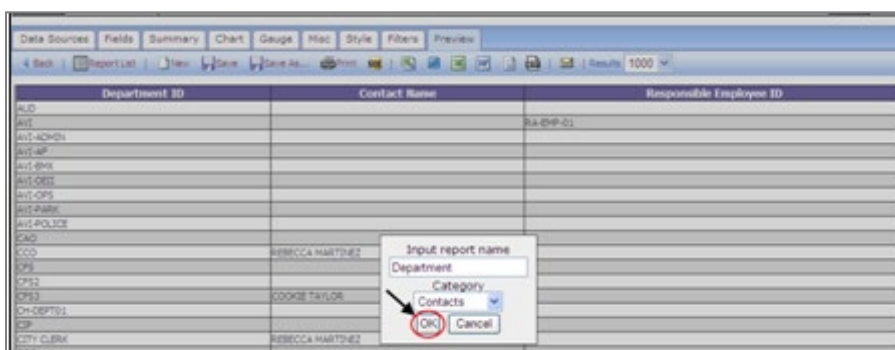


The Report Preview displays.

6. Click the **Save** button to save your report.



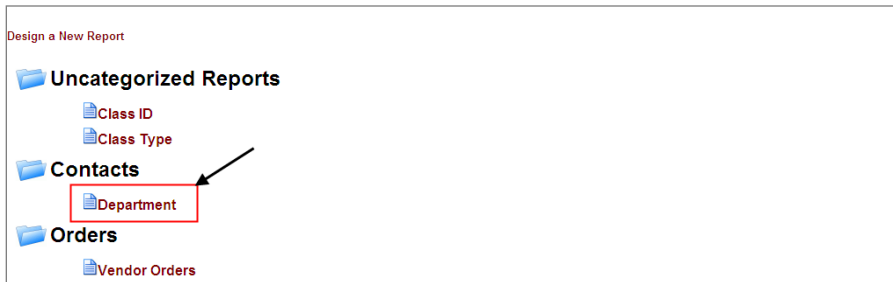
7. Enter a name and category (optional) in the Save dialog box and click the **OK** button.



8. Click the **Report List** button to see your newly created report in the list.



The newly created report shows in the list.

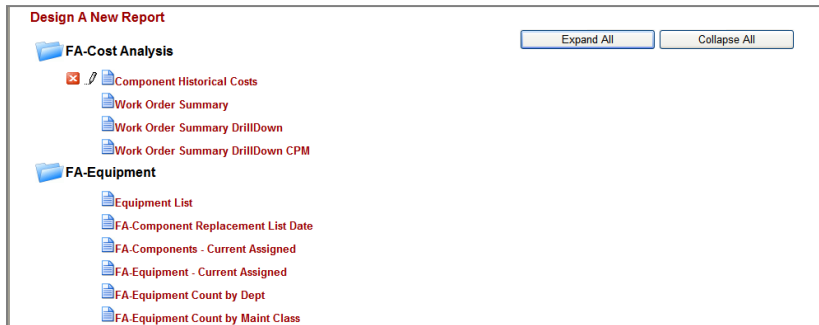


If the report was not given a category, it is listed as an Uncategorized Report.

3. The Report List

The Report List is first page that the user typically interacts with unless given a link to a specific report. This page displays the list of reports. By default, it displays uncategorized reports first in alphabetical order and then displays an alphabetized list of the reports by category.

Report links are shown in red below. Clicking on a report link loads the report into the report viewer. Hovering the cursor near a report name displays the **Delete** and **Modify** buttons. Click the **Delete**  button to delete the report, and click the **Modify**  button to load the report into the Report Designer for modification.



Use this page to do the following:

- Delete an existing report
- View an existing report
- Create a new report
- Modify an existing report

All of these options depend upon how your report administrator has configured the Ad Hoc Query module. Some, none, or all of these options may be available to you.

Deleting a Report

Hover near a report to show the **Delete**  button. Click the **Delete** button to delete the report.

Viewing a Report



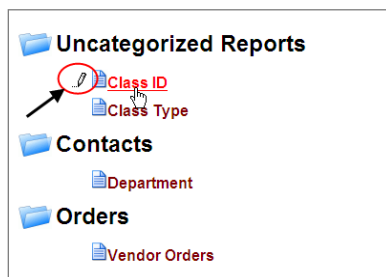
- ➡ Report names are hyperlinks that load the selected report into the report viewer. Click a report name to view the selected report.

The Design a New Report Link

[Design a New Report](#)

- ➡ Clicking the **Design a New Report** link takes you to the report designer where you can create a new report. See [The Report Designer](#) section below for more information about designing a new report.

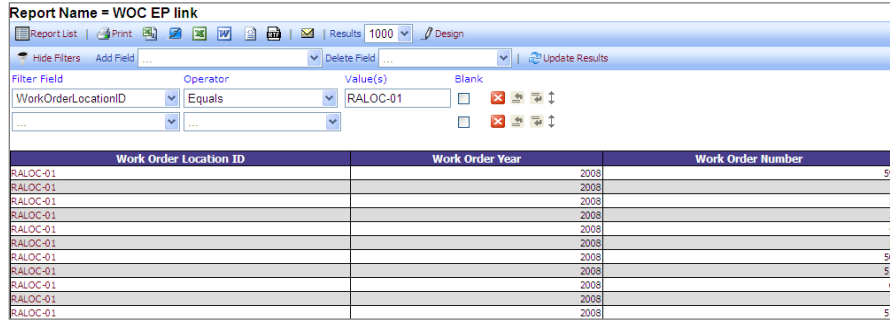
The Modify Button



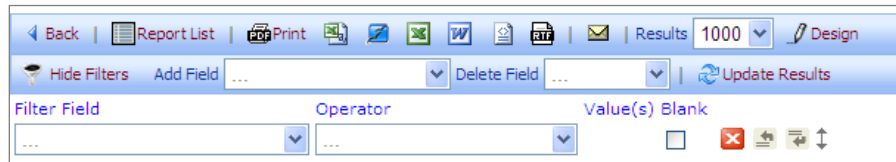
- ➡ Hovering over the report name displays the **Modify**  button. The **Modify** button allows you to modify the report by loading the report in the report designer.

4. The Report Viewer

The Report Viewer is used to view the reports that are listed in the Report List. When loaded, the Report Name and a menu of options displays at the top of the page with the report showing below.



The Report Viewer buttons allow you to do common tasks associated with viewing a report as shown in the picture and table below.



Report Viewer Buttons

Button Name	Function
Back	Allows the user to return to the previous page
Report List	Displays the list of reports
Print	Prints the report
Export Buttons	Exports the report in the selected format: Comma Separated (CSV) file, Open Office document, Microsoft Excel file, Microsoft Word document, XML document, or Rich Text Format (RTF) document.
Email Button	Emails the report
Results drop-down	Allows the user to select the number of results in the report shown on the screen (using powers of 10)
Design Button	Switches to Designer so the user can modify the report
Show/Hide Filters	Allows the user to either display or hide the filters in the Report Viewer
Add/Delete Drop-downs	Allow the user to add/delete fields

Button Name	Function
Update Results	Allows the user to add update the report results after adding/deleting filters or fields

Report Viewer Drop-down Lists

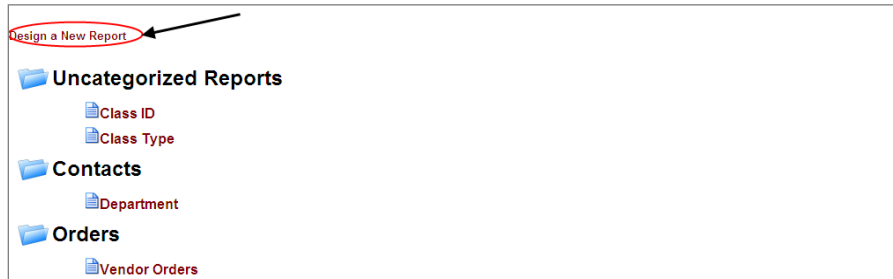
Report Viewer Drop-downs	Function
Reports	Allows the user to select a different report to view
Results	Shows the results
Add Field	Adds a new field to the report
Export Type	Determines what format to export the report in
Filter Field	Selects the field to be filtered
Operator	Allows user to choose an operator for the filter

Users may select filter fields and operators, and to add filters in the Report Viewer by using the filter menu shown in the screenshot below.

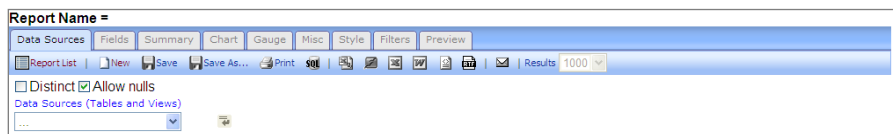
Filter Field	Operator	Value(s)	Blank
EquipmentID	Is Greater Than		☐   
...	...		☐   

5. The Report Designer

➡ Click the **Design a Report** link to open the **Report Designer** which provides the means to specify parameters for the tables of your databases.



The tabs available for designing a report appear along the top of the page.



Each tab is outlined in the sections below.

Data Sources Tab

The **Data Sources** tab shows which tables and views are already stored in the database.

1. Select the desired Data Source (table/view) to preview from the drop-down list.

To join multiple tables or views that have a field with identical entries, click the **Join**  button to select those tables/views.



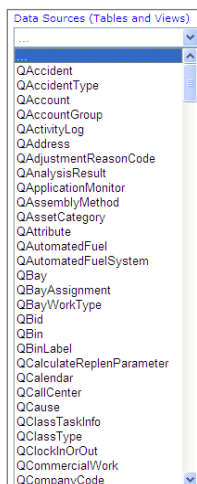
A view is a set of tables that have already been joined.

2. After selecting the tables or views, click the **Continue to Fields** button to go to the next tab, the Fields tab.

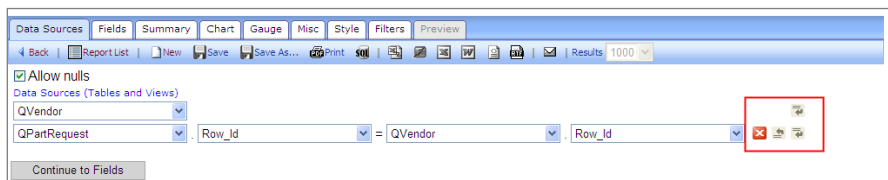


Data Sources Drop-down List

The **Data Sources** drop-down menu is a list of the tables and views available to the user, as shown below.



Function Buttons of Data Sources Tab



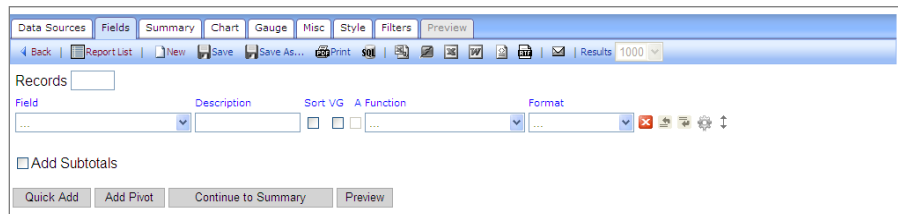
The function buttons are defined in the following table.

Icons	Control Name	Description
	Delete button	Click this button to delete the row the button is on.
	Insert Row button (above)	Click this button to insert a row above the row the button is on.
	Insert Row button(below)	Click this button to insert a row below the row the button is on.

For more information on joining fields when creating a report, refer to the section.

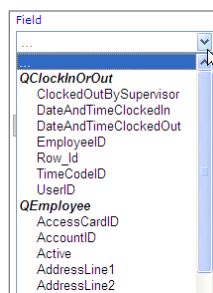
Fields Tab

In the **Fields** tab, choose which field of the table/view in the **Data Sources** tab to display, as well as what format is desired.



Field Drop-down List

The **Field** drop-down menu is a list of the available fields in the table/view that is selected in the **Data Sources** tab. If joining tables/view, the title of the table/view that the field is from appears in parentheses next to the name of the field. Select the fields to display.



Description

The Description field is populated with the description of the field selected in the **Field** drop-down menu to the left. The description appears as the new title of the field when the table/view is displayed.

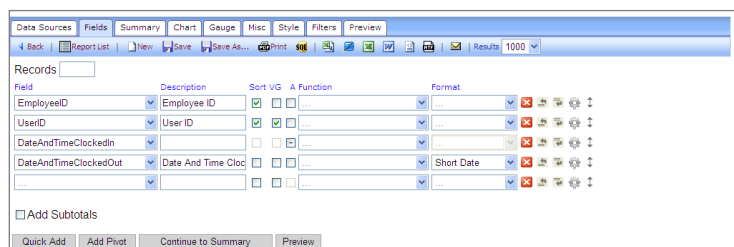


The default description that appears in this box may be edited.

Field	Description
EmployeeID	Employee ID
UserID	User ID
DateAndTimeClockedin	Date And Time Cloc
DateAndTimeClockedOut	Date And Time Cloc

Sort, VG, and A Check Boxes and Function Drop-down List

The table below outlines the **Sort**, **VG**, **A** check boxes, and the **Function** drop-down menu.



Features	Description
Sort check box	Check this box if you want the table or view to be sorted by the field selected in the Field drop-down menu to the left.
VG check box	Check this box to change the column for the field selected in the Field drop-down menu to the left into (groups) subheadings.
A check box	Check this box if you want the table or view to perform arithmetic functions with the numeric field or concatenating text field selected in the Field drop-down menu to the left.
Function drop-down menu	Functions can be chosen from the drop-down menu. If the Group option is selected a group of fields can be created. See Function Descriptions for more information.

Format Drop-down Menu

The **Format** drop-down menu is a list of formats for the field selected in the **Field** drop-down menu directly to the left.

Format	Description	Examples
0,000	Displays the number as a whole number.	1 123 1,234 1,234,567
\$0.00	Displays the number as a currency	\$123.45 \$0.12
0.0	Displays the number with one decimal place	123.5
0.00	Displays the number with two decimal places	123.46
0.000	Displays the number with three decimal places	123.456
0%	Displays the number as a percentage	1% 12%

If the field in the **Field** drop-down menu directly to the left is a date, the **Format** drop-down menu will look like the following:

Format	Description	Examples
Short Date	Displays the date using the mm/dd/yyyy format	8/1/1996
Long Date	Displays the day of the week, month, numeric day, and the year	Friday, August 09, 1996
Short Time	Displays time as hh:mm AM/PM	12:34 AM
Long Time	Displays time as hh:mm:ss AM/PM	12:34:56 PM
Full(short)	Displays the Long Date format, followed by the Short Time format	Friday, August 30, 1996 4:34 PM
Full(long)	Displays the Long Date format, followed by the Long Time format	Wednesday, October 23, 1996 2:28:37 AM
Gen(short)	Displays the Short Date format, followed by the Short Time format	3/12/1996 7:45 PM
Gen(long)	Displays the Short Date format, followed by the Long Time format	2/27/1996 12:45:13 AM

Function Buttons of Fields Tab

The function buttons shown in the screenshot below are for the particular row.

Field	Description	Sort	VG	A Function	Format	
EmployeeID	Employee ID	☒	☐	...	...	    
UserID	User ID	☒	☒	...	...	    

The table below describes the function buttons of the **Fields** tab.

Icons	Control Name	Description
	Delete button	Click this button to delete the row the button is on.
	Insert Row button (above)	Click this button to insert a row above the row the button is on.
	Insert Row button (below)	Click this button to insert a row below the row the button is on.
	Advanced Field Settings	Click this button to perform advanced field settings.
	Move the Row	Click this button to drag the filter to a new location.



Please contact Customer Support if you need additional assistance using any of the Advanced Field Settings described below.

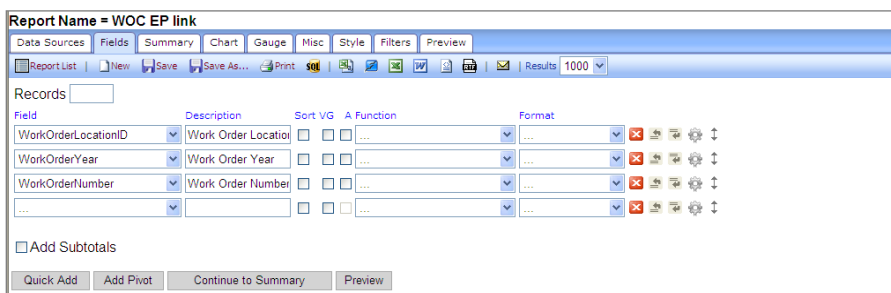
Create a Link in a Query Report to the Enterprise Portal

Following is an example and steps to take to create a link in a Query Report to the Enterprise Portal with a filter.

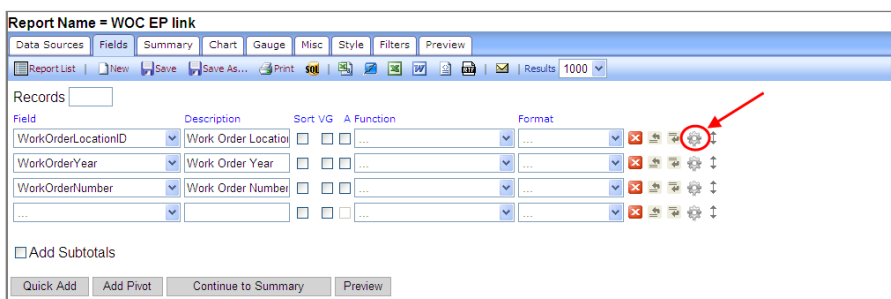
1. On the Main Query page, click the **Pencil Icon**  next to the report name you would like to add a link to the Enterprise Portal. Hover to the left of the report name to see the Pencil Icon.



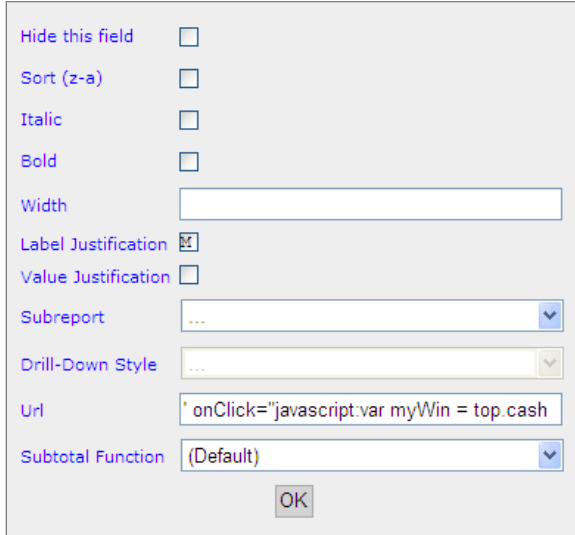
The **Fields** tab for the Report displays:



2. Click the **Gear**  **Icon for Advanced Field Settings.**



The Advanced Field Settings display.



The Advanced Field Settings dialog box contains the following fields and controls:

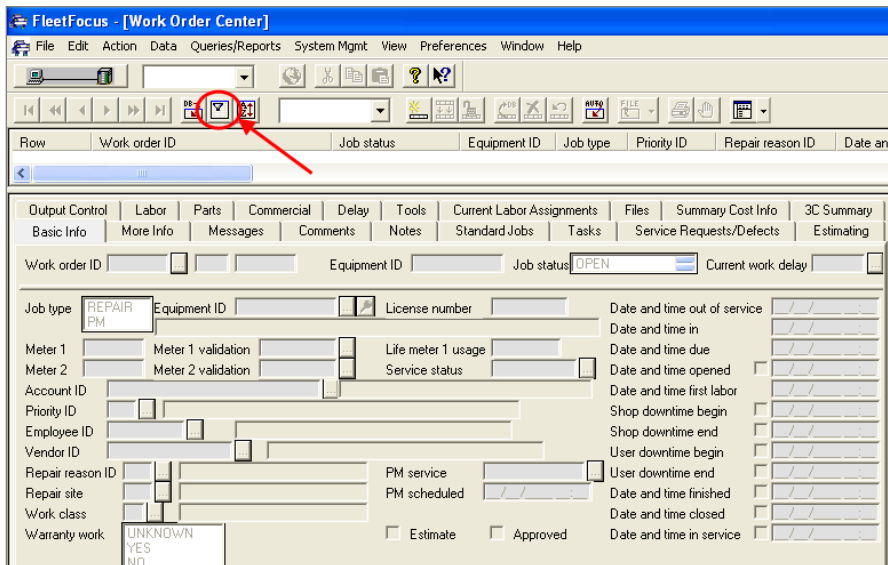
- Hide this field: ☐
- Sort (z-a): ☐
- Italic: ☐
- Bold: ☐
- Width:
- Label Justification:
- Value Justification: ☐
- Subreport:
- Drill-Down Style:
- Url:
- Subtotal Function:
- OK button

- For the **url** field, use the following **url structure** for the Enterprise Portal link:

```
'onClick=javascript:var myWin = top.cash.openEPWindow('Screen ID','Screen ID',
'WindowID:ControlOrder={FieldNumber1}^WindowID:
ControlOrder={FieldNumber2}^WindowID:ControlOrder=
{FieldNumber3}'); return false;' extra='
```

(Above is an example showing three fields.)

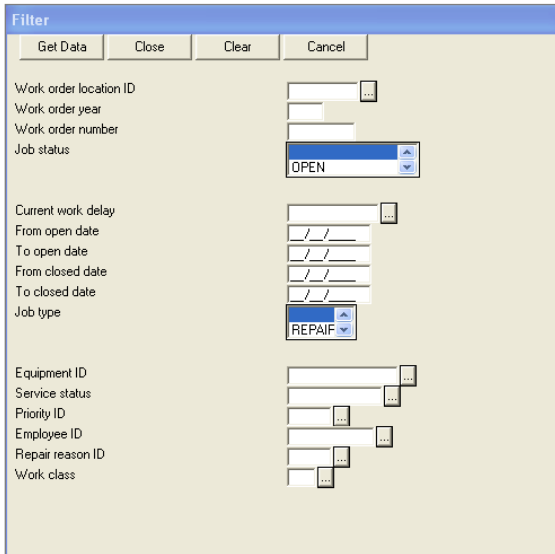
- To locate the **Screen ID**, **Window ID**, and **Control Order**, go to the screen you want to filter to in the GUI and click the filter icon.



The screenshot shows the FleetFocus - [Work Order Center] application window. A red circle highlights the filter icon (a magnifying glass) in the toolbar. The application window displays various fields and controls for managing work orders, including a menu bar, toolbar, and a main data entry area with multiple tabs and input fields.

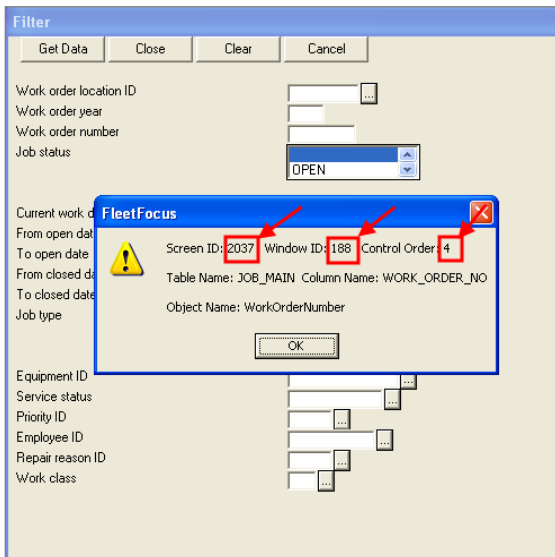
 **Note:** **Field Number** represents the number of the field on the Filter screen, for instance, 3 is the third field on Filter screen.

The Filter screen displays.



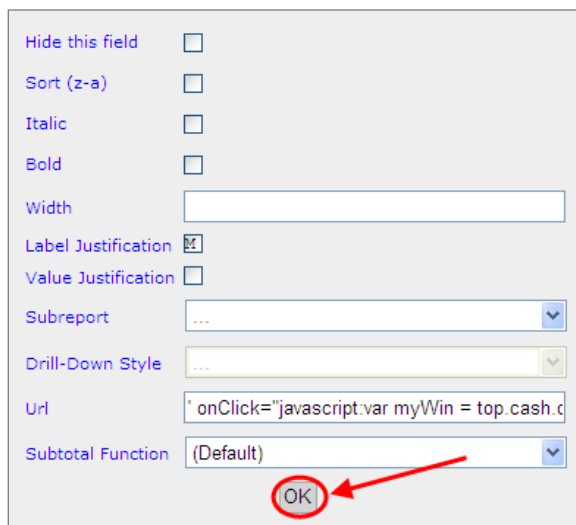
- Shift-click in a field to find the **Screen ID**, **Window ID**, and **Control Order**. The picture below shows the results of shift-clicking in the **Work order number** field.

 **Note:** The **Field Number** for the **Work order number** field is 3 because it is the third field on the Filter screen.



6. Enter data into the **url** field. In the example below, the following data was entered into the **url** field (for Work order location ID, Work order year, and Work order number filter fields):

```
' onClick="javascript:var myWin = top.cash.openEPWindow('2037','2037',  
'188:2={1}^188:3={2}^188:4={3}'); return false;" extra='
```



The **Fields** tab displays.

Report Name = WOC EP link

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Report List New Save Save As... Print SQL Results 1000

Records

Field	Description	Sort	VG	A Function	Format
WorkOrderLocationID	Work Order Location				
WorkOrderYear	Work Order Year				
WorkOrderNumber	Work Order Number				

☐ Add Subtotals

Quick Add Add Pivot Continue to Summary Preview

- Click the **Preview** button to see the Query Report and test the link to the Enterprise Portal.

Report Name = WOC EP link

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Report List New Save Save As... Print SQL Results 1000

Records

Field	Description	Sort	VG	A Function	Format
WorkOrderLocationID	Work Order Location				
WorkOrderYear	Work Order Year				
WorkOrderNumber	Work Order Number				

☐ Add Subtotals

Quick Add Add Pivot Continue to Summary **Preview**

The Report Preview displays.

Report Name = WOC EP link

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Report List New Save Save As... Print SQL Results 1000

Work Order Location ID	Work Order Year	Work Order Number
RALOC-01	2008	59
RALOC-01	2008	1
RALOC-01	2008	2
RALOC-01	2008	3
RALOC-01	2008	4
RALOC-01	2008	5
RALOC-01	2008	50
RALOC-01	2008	51
RALOC-01	2008	6
RALOC-01	2008	7
RALOC-01	2008	55
RALOC-01	2008	11
RALOC-01	2008	13
RALOC-01	2008	14
RALOC-01	2008	15

- Click the link.

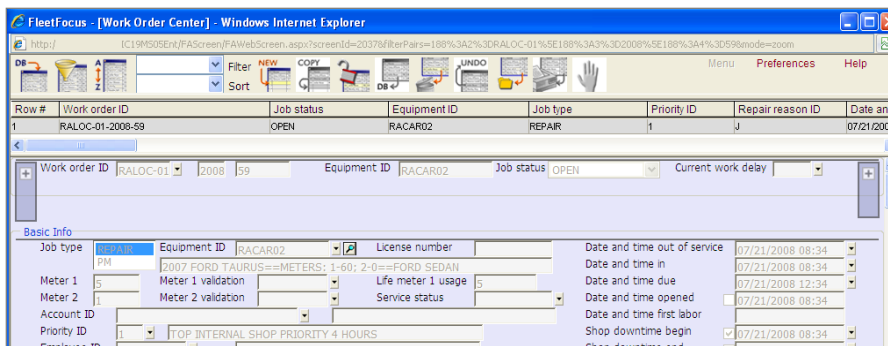
Report Name = WOC EP link

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Report List New Save Save As... Print SQL Results 1000

Work Order Location ID	Work Order Year	Work Order Number
RALOC-01	2008	59
RALOC-01	2008	1
RALOC-01	2008	2
RALOC-01	2008	3
RALOC-01	2008	4
RALOC-01	2008	5
RALOC-01	2008	50
RALOC-01	2008	51
RALOC-01	2008	6
RALOC-01	2008	7
RALOC-01	2008	55
RALOC-01	2008	11
RALOC-01	2008	13
RALOC-01	2008	14
RALOC-01	2008	15
RALOC-01	2008	17
RALOC-01	2008	18
RALOC-01	2008	19
RALOC-01	2008	20
RALOC-01	2008	23
RALOC-01	2008	27
RALOC-01	2008	28

The Enterprise Portal displays with the filtered information.



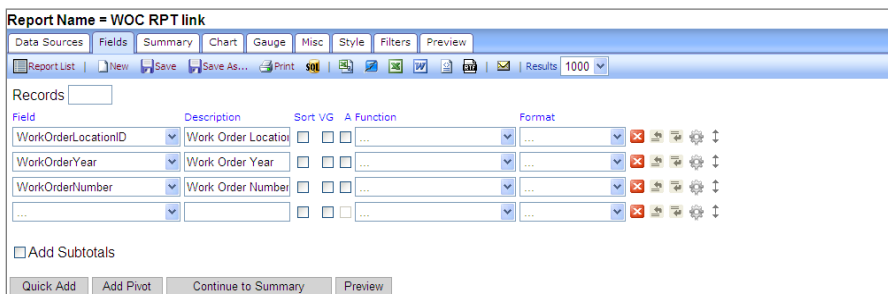
Create a Link in a Query Report to a Crystal Report

The following outlines the steps to create a link in a Query Report to a Crystal Report with a filter.

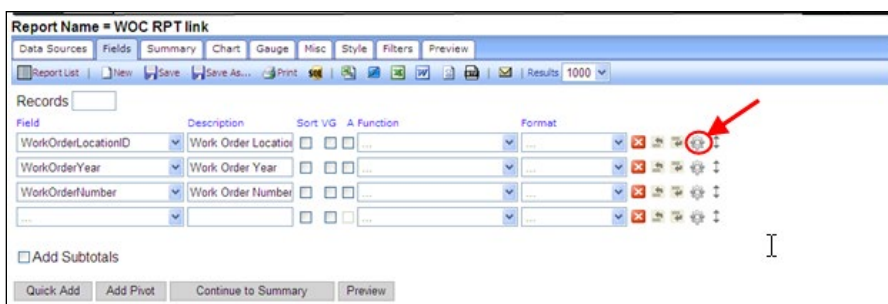
1. On the Main Query page, select the pencil icon next to the report that you would like to add a link to a Crystal Report. Hover to the left of the report name to see the pencil icon.



The **Fields** tab for the Report displays.



2. Click the gear icon  for **Advanced Field Settings**.



The **Advanced Field Settings** display.

Hide this field ☐

Sort (z-a) ☐

Italic ☐

Bold ☐

Width

Label Justification

Value Justification ☐

Subreport

Drill-Down Style

Url

Subtotal Function

OK

3. In the **url** field, you need to know the following parameters:

- **Report Folder:** the folder the report resides in
- **Report Name:** the name of the report
- **Filter Name:** what you are filtering on (see below to find filter names)
- **Field Order:** the order of the field on the filter screen (e.g., 1 = 1st).

4. Use the **url structure** as follows for the Crystal Report link:

```
' onclick="top.cash.ReportWindow('ReportFolder/ReportName',
'FilterName={FieldOrder1}&FilterName={FieldOrder2}&
FilterName={FieldOrder3}'); return false;" extra='
```

(The above example is for three filter fields.)

Hide this field ☐

Sort (z-a) ☐

Italic ☐

Bold ☐

Width

Label Justification

Value Justification ☐

Subreport

Drill-Down Style

Url

Subtotal Function

OK

5. To find the **Filter Name** parameters, you may use one of three methods as described below.

- If you have Report Designer, you can open the Crystal report to locate the parameters.
- If you are linking to a report that is linked to from the portals, for most of them, the parameters are listed in the label below the setting as shown in the picture below:

Settings for Work Order Posting page
Current Report - Print Work Order

Shop Operations/FA-WODtl.rpt

Parameters: WONum; WOYear; Location

Restore Default

- You can go to the report and do the following:
 - a. Click on the **Show Filter** button in the upper left corner of the report.

ReportViewer - Windows Internet Explorer

http://[C:\9MS05Ent\Reporting\ReportViewer.aspx?ReportName=Shop+Operations%2FA-WODtl.rpt&Page=Report&StartContinuous=true&LOCATION=RACAR01]

Show Filter To PDF Schedule

Work Order Detail

Work Order Detail for Equipment RACAR01

Report Date: 11/17/2010

Work Order: RALOC-01-2008-3 Status: OPEN

Dept: CHDEPT01 - TEST DEPART Warranty: UNKNOWN

Asset No: 1230	Opened By: RANIS	Date In: 5-6-2008 11:57 AM
License: TEST-10	Current Equip Status: CNACCT001	Date Due: 5-6-2008 3:57 PM
Job Type: REPAIR	Account: 0	Opened: 5-6-2008 11:57 AM
Meter 1: 11	Reference WO: 0	Finished:
Meter 2: 6	Estimated Hours: 0.00	Closed:
Shop Hrs: 0.00	User Hours: 0.00	Warranty Expire: 12-30-2020
Serial No: SHRACAR01		
Priority: 1 - TOP	Accident:	
Incident:	Project:	

Service Request Tasks

Service Request: RACAR01-1148

Symptom: JH-SYMP012 - JH-SYMP012 DESCRIPTION

Comments:

Task: (RA-TASK-02) Richard S Task 2 Supports Raloc-01 Warranty: NO

WAC: RA1 - TEST WAC Reason: 3 - OTHER

Work Class: Comments:

Labor Labor Hrs Cost

The filter displays.

ReportViewer - Windows Internet Explorer

http://[C:\9MS05Ent\Reporting\ReportViewer.aspx?ReportName=Shop+Operations%2FA-WODtl.rpt&Page=Report&StartContinuous=true&LOCATION=RALOC-01&WOYEAR=2008&WONUM=3]

Show Report Schedule

Work Order Detail Add to Favorites

Enter the Location ID:

RALOC-01

Enter the WO Year (YYYY):

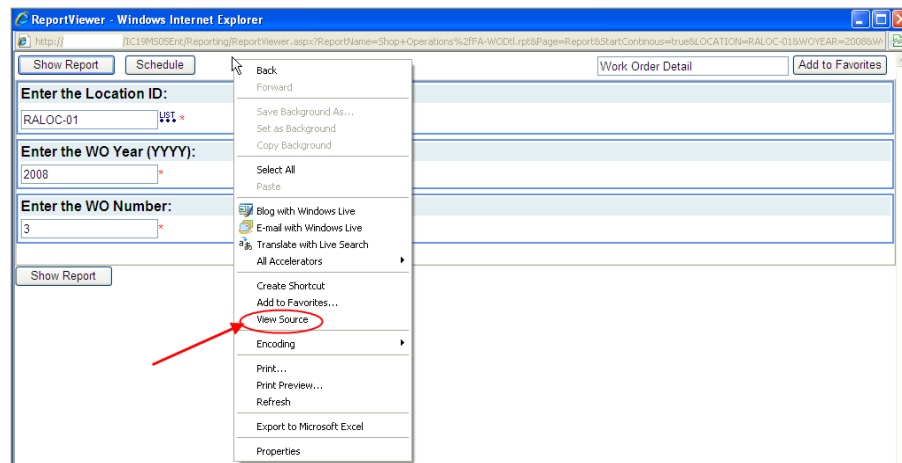
2008

Enter the WO Number:

3

Show Report

- b. Right-click on the page and select **View Source**.



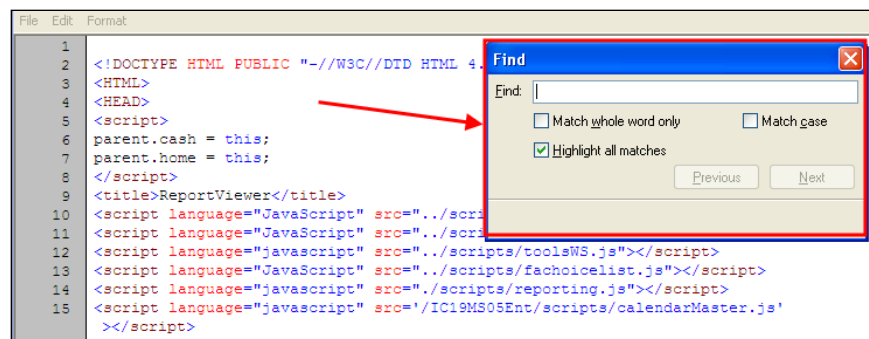
The source file displays.

```

File Edit Format
1
2 <!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.0 Transitional//EN" >
3 <HTML>
4 <HEAD>
5 <script>
6 parent.cash = this;
7 parent.home = this;
8 </script>
9 <title>ReportViewer</title>
10 <script language="JavaScript" src="../scripts/utlis.js"></script>
11 <script language="JavaScript" src="../scripts/childPing.js"></script>
12 <script language="JavaScript" src="../scripts/toolsWS.js"></script>
13 <script language="JavaScript" src="../scripts/fachoicelist.js"></script>
14 <script language="JavaScript" src="../scripts/reporting.js"></script>
15 <script language="JavaScript" src='../IC19MS05Ent/scripts/calendarMaster.js'
></script>
16 <link href='../IC19MS05Ent/styles/yui/calendar.css' type="text/css"
rel="stylesheet" />
17 <link href='../IC19MS05Ent/styles/faSuiteInfoCenter.css' type="text/css"
rel="stylesheet" />
18 <link href='../IC19MS05Ent/styles/jquery_theme_redmond/ui.all.css' type="text/css"
rel="stylesheet" />
19 <meta content="Microsoft Visual Studio .NET 7.1" name="GENERATOR">
20 <meta content="C#" name="CODE_LANGUAGE">
21 <meta content="JavaScript" name="vs_defaultClientScript">
22 <meta content="http://schemas.microsoft.com/intellisense/ie5"
name="vs_targetSchema">
23 <LINK href='../styles/fasuiteinfocenter.css' type="text/css" rel="stylesheet">
24 </HEAD>
25 <body onload="InitAppWdy();" onunload="ReleaseAppWdy();" onmouseover="if (CloseWindow

```

c. Click **Ctrl-F** to open the **Find** dialog box.



- d. Type, 'Input Name' into the **Find:** field to bring up the parameters.



Note: The input names without 'txt' are the ones you need for the **url** field information, i.e., LOCATION, WOYEAR, and WONUM.)

```

121 <TD align="right" valign="top" nowrap>
122 <input name="txtFavoriteItem" type="text" value="Work Order Detail" id="txtF
123 <input type="submit" name="btnSaveFavorite" value="Add to Favorites" onclick=
124 </TD>
125 </tr>
126 </TABLE>
127 </div>
128 </td>
129 <td>
130 <div id="tblHdr2" style="LEFT: 0px; POSITION: absolute; TOP: 0px">
131 <table height="100%" cellSpacing="0" cellPadding="0" width="100%" border="0">
132 <tr>
133 <td>
134 <span id="tblProcessing" onclick="if(top.cash &amp; &amp; top.cash.ShowUIInfo(event,7143,10731,11)) {if
135 </td>
136 </tr>
137 </table>
138 </div>
139 </td>
140 </tr>
141 </TABLE>
142 <table height="100%" cellSpacing="0" cellPadding="0" width="100%" border="1">
143 <tr>
144 <td id="tblCellReport" valign="top" nowrap="nowrap" width="100%" colspan="3" height="100%"><div id="pnlRestrictions">
145 <table class="ParamObject">
146 <tr>
147 <td colspan="2" class="ParamHeader" colspan="2">Enter the Location ID:</td>
148 </tr>
149 <tr>
150 <td colspan="2" class="ParamHeader" colspan="2">Enter the Location ID:</td>
151 <td colspan="2" class="ParamHeader" colspan="2">Enter the Location ID:</td>
152 </tr>
153 <tr>
154 <td colspan="2" class="ParamHeader" colspan="2">Enter the Location ID:</td>
155 <td colspan="2" class="ParamHeader" colspan="2">Enter the Location ID:</td>
156 </tr>
157 <tr>
158 <td colspan="2" class="ParamHeader" colspan="2">Enter the Location ID:</td>
159 <td colspan="2" class="ParamHeader" colspan="2">Enter the Location ID:</td>
160 </tr>
161 <tr>
162 <td colspan="2" class="ParamHeader" colspan="2">Enter the Location ID:</td>
163 <td colspan="2" class="ParamHeader" colspan="2">Enter the Location ID:</td>
164 </tr>
165 <tr>
166 <td colspan="2" class="ParamHeader" colspan="2">Enter the Location ID:</td>
167 <td colspan="2" class="ParamHeader" colspan="2">Enter the Location ID:</td>
168 </tr>
169 <tr>
170 <td colspan="2" class="ParamHeader" colspan="2">Enter the Location ID:</td>
171 <td colspan="2" class="ParamHeader" colspan="2">Enter the Location ID:</td>
172 </tr>
173 </td>
174 </tr>
175 </td>
176 </tr>
177 </td>
178 </tr>
179 </td>
180 </tr>
181 <td>
182 <input type="submit" name="btnBottom" value="Show Report" onclick="if(top.cash &amp; &amp; top.cash.ShowUIInfo
183 </td>
184 </tr>
185 </div>
186 <div id="info" style="VISIBILITY: hidden"><input id="chkSubmit" type="checkbox" name="chkSubmit" checked="checked"
187 </div>

```

6. Once you have all the parameter information, enter it in the **url** field for the Advanced Field Settings, click the **OK** button as shown below:

' onclick="top.cash.ReportWindow('Shop Operations/FA-WODtl.rpt','LOCATION={1}&WOYEAR={2}&WONUM={3}'); return false;" extra='

Hide this field ☐

Sort (z-a) ☐

Italic ☐

Bold ☐

Width

Label Justification

Value Justification ☐

Subreport

Drill-Down Style

Url

Subtotal Function (Default)

OK

The **Fields** tab displays.

- Click the **Preview** button to preview the report.

Report Name = WOC RPT link

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Report List New Save Save As... Print SQL PDF Word Excel Mail Results 1000

Records

Field	Description	Sort	VG	A Function	Format
WorkOrderLocationID	Work Order Location	☐	☐	...	...
WorkOrderYear	Work Order Year	☐	☐	...	...
WorkOrderNumber	Work Order Number	☐	☐	...	...
...	...	☐	☐	...	...

☐ Add Subtotals

Quick Add Add Pivot Continue to Summary **Preview**

- Click the link.

Report Name = WOC RPT link

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Report List New Save Save As... Print SQL PDF Word Excel Mail Results 1000

Work Order Location ID	Work Order Year	Work Order Number
RALOC-01	2008	59
RALOC-01	2008	1
RALOC-01	2008	2
RALOC-01	2008	3
RALOC-01	2008	4
RALOC-01	2008	5
RALOC-01	2008	50
RALOC-01	2008	51
RALOC-01	2008	6
RALOC-01	2008	7
RALOC-01	2008	55
RALOC-01	2008	11
RALOC-01	2008	13
RALOC-01	2008	14
RALOC-01	2008	15

The filtered Crystal Report displays.

Work Order Detail for Equipment RACAR01

Report Date: 11/17/2010

Work Order: **RALOC-01-2008-3** Status: **OPEN**

Dept: **CHDEPT01 - TEST DEPART** Warranty: **UNKNOWN**

Asset No: 1230	Opened By: RANWIS	Date In: 5-6-2008 11:57 AM
License: TEST-10	Current Equip Status: CIACCT001	Date Due: 5-6-2008 3:57 PM
Job Type: REPAIR	Reference W/O: 0	Opened: 5-6-2008 11:57 AM
Meter 1: 11	Estimated Hours: 0.00	Closed:
Meter 2: 6	User Hours: 0.00	Warranty Expire: 12-30-2020
Shop Hrs: 0.00		
Serial No: SRAACAR01		
Priority: 1 - TOP	Accident:	
Incidents:	Project:	

Service Request Tasks

Service Request: RACAR01-1148

Symptom: JH-SYHPTOM2 - JH-SYHPTOM2 DESCRIPTION

Comments:

Task: (RA-TASK-02) Richard'S Task 2 Supports Raloc-01 Warranty: NO

WAC: RA1 - TEST WAC	Reason: J - OTHER
Work Class:	Comments:
Labor	
Emp: (RAEMP1) Richard'S Emp #1	Labor Hrs: 0.35 Cost: 14.00
(RAEMP1) Richard'S Emp #1	0.63 25.20

Create an Overall Header to Visually Group Columns



Ad Hoc Query allows you to group columns together visually with an overall header. This does not actually group the columns, it *visually* includes columns in the same overall header.

- To implement this feature, for each column to group together, click the **Advanced Field**

Settings  button and type the Column Group text in the Advanced Field Settings dialog box.

Column Group: **Work Order**

Hide this field: ☐

Sort (z-a): ☐

Italic: ☐

Bold: ☐

Width:

Label Justification: ☒

Value Justification: ☐

Subreport:

Drill-Down Style:

Url:

Subtotal Function:

Gradient Cells Shading: ☐

Expression:

OK

The columns will display grouped under the given heading.

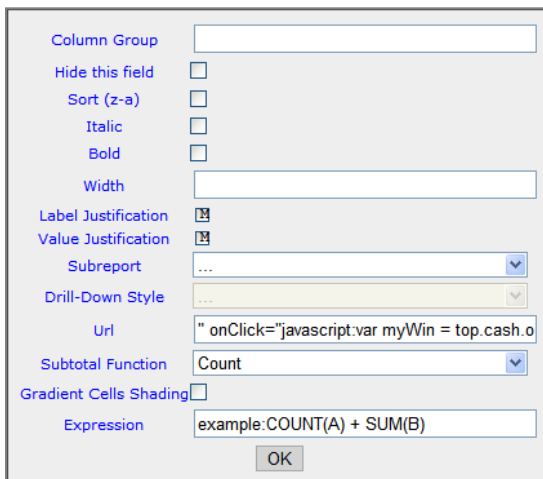
Work Order				
Location	Year	Number	Date And Time Opened	Total Cost
05	1996	1	12/6/1996	\$0.00
05	1996	10001	12/6/1996	\$0.00
43	2008	1	11/12/2008	\$1,141.50
43	2008	2	12/10/2008	\$19,061.25
43	2008	3	12/10/2008	\$0.00
43	2009	11	6/16/2009	\$0.00

Create Auto Drill-down within Report to Show Details

To create an auto drill-down within a single report to show the details:

1. Click the **Advanced Field Settings**  button to open the Advanced Field Settings dialog box for the field you are summarizing.

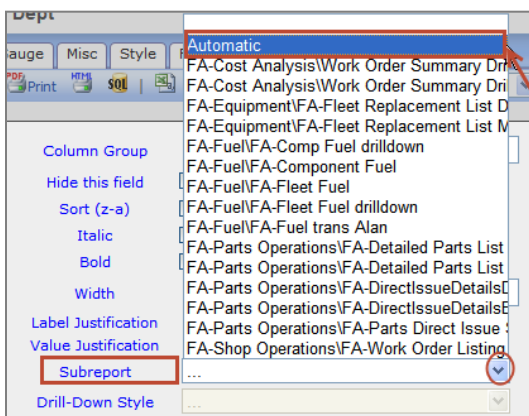
The Advanced Field Settings dialog box displays.



The Advanced Field Settings dialog box contains the following fields and options:

- Column Group:
- Hide this field: ☐
- Sort (z-a): ☐
- Italic: ☐
- Bold: ☐
- Width:
- Label Justification: ☒
- Value Justification: ☒
- Subreport:
- Drill-Down Style:
- Url:
- Subtotal Function:
- Gradient Cells Shading: ☐
- Expression:
- OK button

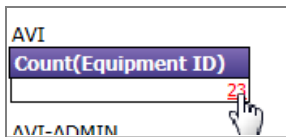
2. Click the drop-down for the sub-report list and choose **Automatic**.



The Subreport list dropdown shows the following options:

- Automatic
- FA-Cost Analysis\Work Order Summary Dr
- FA-Cost Analysis\Work Order Summary Dri
- FA-Equipment\FA-Fleet Replacement List D
- FA-Equipment\FA-Fleet Replacement List M
- FA-Fuel\FA-Comp Fuel drilldown
- FA-Fuel\FA-Component Fuel
- FA-Fuel\FA-Fleet Fuel
- FA-Fuel\FA-Fleet Fuel drilldown
- FA-Fuel\FA-Fuel trans Alan
- FA-Parts Operations\FA-Detailed Parts List
- FA-Parts Operations\FA-Detailed Parts List
- FA-Parts Operations\FA-DirectIssueDetails
- FA-Parts Operations\FA-DirectIssueDetailsE
- FA-Parts Operations\FA-Parts Direct Issue
- FA-Shop Operations\FA-Work Order Listing

3. In Preview view, the summary number appears in a different color and when you point to it, the hand pointer displays.



4. Click once on the summary to view drill-down details as shown below.

AVI

Count(Equipment ID)
1131000
1121000
933408
936401
927001
923506
923510
923512
923508

Add Expressions to Perform Calculations on Fields

- ➡ To add expressions to perform simple calculations on a specified field, use the Expressions text box located in the Advanced Field Settings dialog box.

Column Group

Hide this field ☐

Sort (z-a) ☐

Italic ☐

Bold ☐

Width

Label Justification

Value Justification

Subreport

Drill-Down Style

Url

Subtotal Function

Gradient Cells Shading ☐

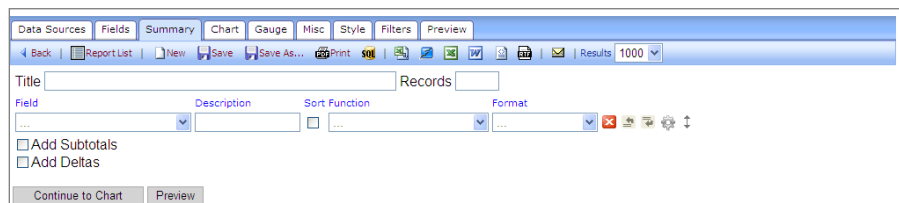
Expression example:COUNT(A) + SUM(B)

OK

This text box accepts simple code and allows calculations to be performed on fields provided by the connection string or view.

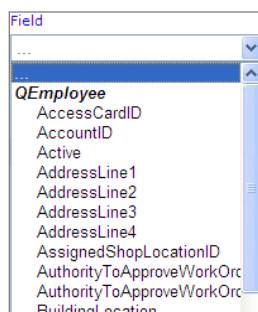
Summary Tab

In the **Summary** tab, a table can be created that summarizes the chosen fields using different functions (for example, average, count, maximum, and so on). You can group fields together by choosing the **Group** option from the **Function** drop-down menu.



Field Drop-down Menu

The **Field** drop-down menu is a list of available fields in the table/view that have been selected or created in the **Data Sources** tab and that have numeric entries. Select the fields to summarize.



Description

The **Description** text box is populated with the description of the field selected in the **Field** drop-down menu to the left. The description appears as the new title of the field when the **Summary Table** is displayed.

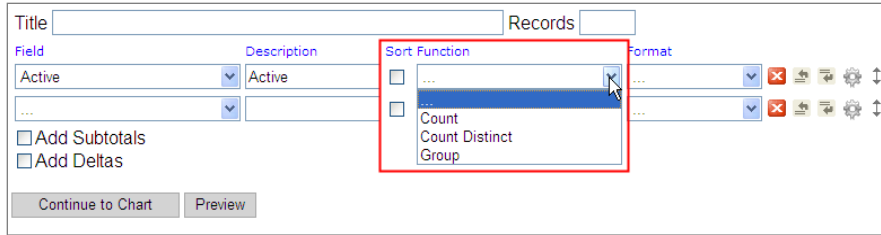


The default description may be edited.



Sort Check Box and Function Drop-down Menu

The **Sort** check box and the **Function** drop-down menu are shown in the screenshot below.



The table below describes the **Sort** check box and **Function** drop-down menu features.

Features	Description
Sort check box	Checking this box causes the table/view to be sorted by the field selected in the Field drop-down menu to the left in ascending order.
Function drop-down menu	Lists the functions that may be applied to the field. For example: Choosing Average causes the Summary Table to display the average value for the entries in the field selected in the Field drop-down menu.)  Note: Each selection must be either grouped or a function or all can be None.

Format Drop-down Menu

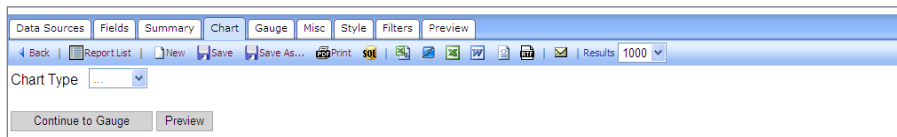
This is the same format as the **Format Drop-down Menu** from the **Fields** tab. See the [Format Drop-down Menu](#) Section.

Function Buttons

This is the same format as the **Function Buttons** from the **Fields** tab. See the [Format Drop-down Menu](#) Section.

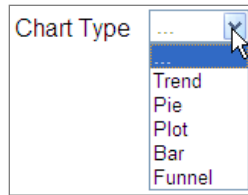
Chart Tab

In the **Chart** tab, a chart can be created using the data in the table/view selected on the **Data Sources** tab.



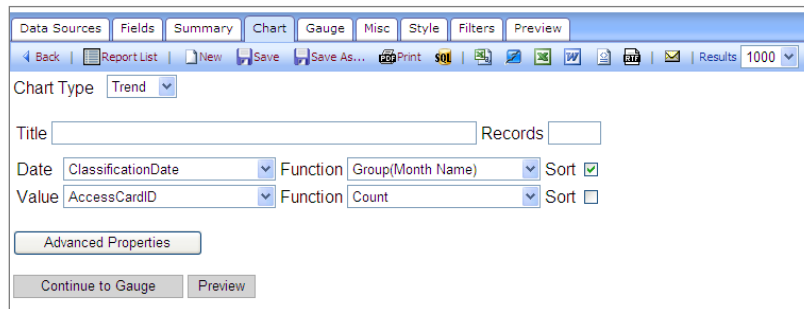
None Selection

When the chart type is **None (...)**, no chart appears.



Trend Selection

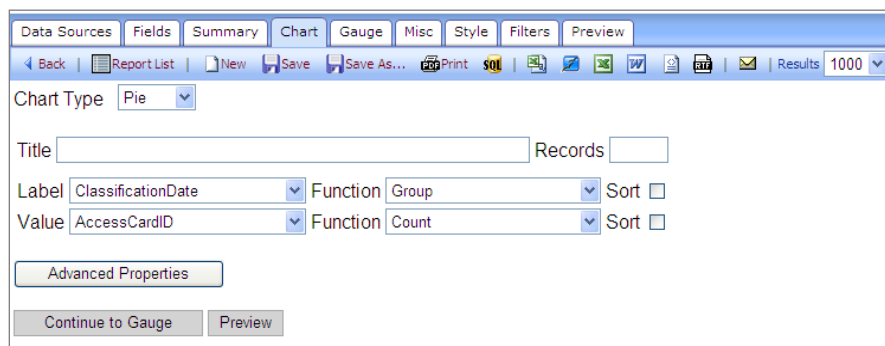
When the chart type is **Trend**, the chart appears in **Trend** format.



Features	Description
Trend chart	By choosing chart type Trend , the chart appears in Trend format.
Date drop-down menu	Choose any field of date format like birth date, join date, etc.
Value drop-down menu	Choose any value from the drop-down list.

Pie Selection

The screenshot and table below describe the **Pie** chart selection.



Features	Description
Pie chart	By choosing chart type Pie , the chart appears in Pie format.
Label drop-down menu	Choose any label from the drop-down list.

Features	Description
Value drop-down menu	Choose any value from the drop-down list.

Plot Selection

The screenshot and table below describe the **Plot** (chart) selection.

Features	Description
Plot chart	By choosing chart type Plot , the chart appears in Plot format.
X-axis drop-down menu	Choose any field from the drop-down for the X-axis.
Y-axis drop-down menu	Choose any field from the drop-down for the Y-axis.

Bar Selection

The screenshot and table below describe the **Bar** (chart) selection entries.

Features	Description
Bar chart	By choosing chart type Bar , the chart appears in Bar format.
Label drop-down menu	Choose any label from the drop-down list.

Features	Description
Value drop-down menu	Choose any value from the drop-down list.

Funnel Selection

The screenshot and table below describe the **Funnel** selection entries.

Features	Description
Funnel chart	By choosing chart type Funnel , the chart appears in Funnel format.
Label drop-down menu	Choose any label from the drop-down list.
Value drop-down menu	Choose any value from the drop-down list.

Gauge Tab

In the Gauge tab, you can add a panel of radial or linear gauges to a report.

Title: Enter a title.

Results: Allows you to specify how many gauges you want to show. For example, if you choose to count the number of products in multiple categories, you could specify that you want to only show the first 4 categories by alphabetical order.

Name: Choose the gauge labels.

Value: Choose the field to which a function is applied.

Function: Choose a function to apply to the field.

Sort: Choose the sort.

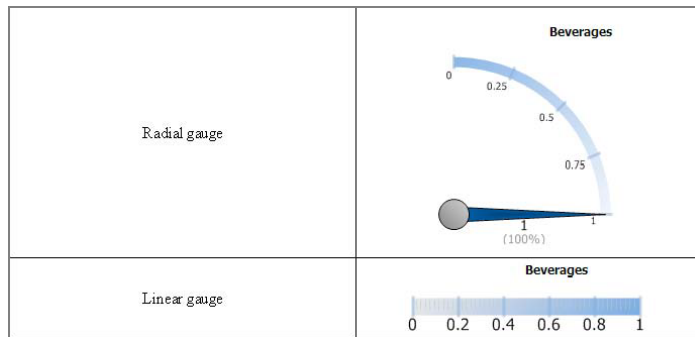
Function: Choose the function to apply to the field.

Minimum/Maximum: Enter a minimum and maximum.

Color: Enter gauge colors.

Gauge Style: Select the gauge style.

Radial/Linear: See screenshot below for a depiction of the types of gauges.



Animated Gauges: A gauge style called Animated Half Circle is now available. If you choose this style, you have some additional options from which to select. When you preview the report, you can see the gauge arrow move to the value position.

Gauge Style	☐ Radial ☐ Radial 2 ☒ Animated Half Circle ☐ Linear
KPI Low	
KPI High	
Update	sec
Red Values	☒ Hide ☐ Low ☐ High

Target Report: Select a target report if desired.

Misc Tab

In the Misc Tab, you can add a title and description of the report by following the steps below.

1. Select the Misc Tab.

2. Complete the fields as desired according to the following field definitions:

- **Title:** Enter the title of the report.
- **Description:** Enter a description for the report.
- **Header:** Allows a user to set a report header.
- **Footer:** Allows a user to set a report footer.
- **Shared With:** Selecting those that may share the report. **Everyone** allows other users to see your report and modify it. Selecting **Read-only** sets the report so that it is only modifiable by the report owner.
- **Rights:** Select from the following rights:
 - **None:** This report does not appear in the reports list.
 - **Full Access:** Allows anyone to view and modify the report.
 - **Read-Only:** Only the report owner can modify and save the report. Other users can modify the report, but will have to save it under a different name.
 - **View Only:** A user can run the report, access the filter, add or remove fields from the report (for that session), print, or export the report. No changes can be saved.
 - **Locked:** A user can run the report as-is.
- **Drill-Down:** Select a drill-down from the list.

Report Name =

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Report List | New | Save | Save As... | Print | Results 1000

Title
Employee Data

Description
A list of all employee birthdays.

Header
Birthday List

Footer

Share With: Everyone | Rights: None

Drill-Down Key: ...

Continue to Style | Preview

3. Select the **Preview** tab to see how the information displays.

Report Name =

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Report List | New | Save | Save As... | Print | Results 1000

Birthday List

Employee Data

A list of all employee birthdays.

Date Of Birth
6/19/1955
2/28/1972
6/26/1963
3/8/1961
11/1/1958
6/28/1961
3/7/1969
7/27/1943
4/23/1955
7/31/1952

Style Tab

In the **Style** tab, you can customize the look of the table. You can change the color of the border, header, and rows. The order of report items can also be changed.

Data Sources Fields Summary Chart Gauge Misc Style Filters Preview

Back | Report List | New | Save | Save As... | Print | Results 1000

Border color: (Default) | Header color: (Default) | Header foreground color: (Default)

Item color: (Default) | Item foreground color: (Default) | Alternating item color: (Default)

Restore Default

Sample grid

Number	Letter
1	A
2	B

☐ Landscape printing
☒ Show page number
☒ Show date and time
☒ Use pagination in web view
☐ Add bookmark for each visual group
☐ Page Break After Visual Groups
☐ Minimize Grid Width

Visual Group Style: Comma Delimited

Items Per Page (In Viewer): 10000

Report order

- Chart
- Gauges
- Summary
- Detail

Field\Value column pairs: 2

☐ Show main report in Field | Value style
☐ Show summary report in Field | Value style

Continue to Filters | Preview

Report style properties can be changed using the drop-downs. When the properties are changed, the sample grid below can be used to see the differences.

The colors which can be changed are: Border color, Header color, Header foreground color, Item color, Item foreground color, and Alternating item color.

Explanations of other properties found on tab are given below:

- **Landscape printing:** Determines whether the report prints in landscape mode. (It can also be set using print properties in the printer dialogue box) Show page number in pdf: Sets whether the page numbers are shown in pdf report exports. Show date and time in pdf: Sets whether the date and time are shown in pdf report exports.
- **Use pagination in web view:** Sets whether pagination is used in the report viewer.
- **Add bookmark for each visual group:** Sets whether bookmarks are used in adobe pdf exports.
- **Page Break After Visual Groups:** Sets whether a page break occurs after the visual groups.
- **Minimize Grid Width:** Sets the grid width as small as possible.
- **Visual Group Style:** Sets the visual grouping style for the information. Choices include: Comma Delimited, Comma Delimited with Labels, Line Delimited, Line Delimited with Labels, Field Value, Multi-Level, Multi-Level with Labels, and VG Hierarchy.
 - **Field Value** style is an invoice type style that provides a cleaner, more modern way of displaying simple data used for grouping.

Equipment ID	1121000	Model Year	1988.000
Manufacturer ID	AVIATION	Equipment Description	AVIATION
Work Order Location ID	Work Order Year	Work Order Number	Total Cost
JG	1995.000	697.000	.000
KG	1998.000	10614.000	.000
KG	1995.000	658.000	.000
KG	1995.000	661.000	.000

- **VG Hierarchy** style better shows multiple nested tiers of grouping and allows you to show or hide details with a single mouse click. It provides interactivity in reports as you view them.

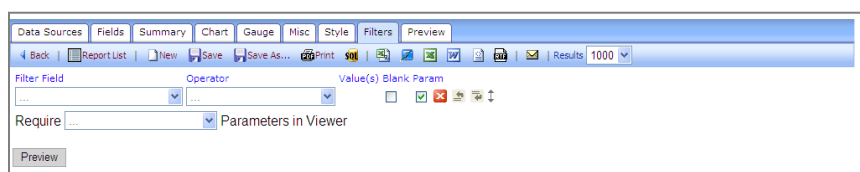
Model Year	Manufacturer ID	Equipment Description	Equipment ID	Work Order Location ID	Work Order Year	Work Order Number	Total Cost
2008	2 AXLE FLATBED	2008 LOAD TRAIL 20 FT. 2X TILT TRAILER	089204	EG	2008	2945	62.400
			089205	EG	2008	3475	.000
	ACCTK	TRAILER	087802	EG	2008	2385	.000
				EG	2009	4834	.000
	BIGTX	2004 BIG TEX PAN TILT 2 AXLE TRAILER	087804	EG	2008	3212	91.900
				EG	2009	4836	.000

- **Items per page:** Allows a user to set the number of items show per page in a grid.
- **Report order:** Allows the user to set the order of the Summary, Chart, Gauges, and Detail grids.

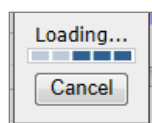
- **Field|Value column pairs:** Allows a user to set the field value style. This is useful for Accounting/financial reports.
- **Show main report in Field|Value style:** Allows a user to set whether the main detail grid uses Field-Value style
- **Show summary report in Field|Value style:** Allows a user to set whether the summary grid uses Field-Value style.

Filters Tab

In the **Filters** tab, the fields of the table/view chosen in the **Data Sources** tab can be filtered so that only pertinent entries appear in the table.

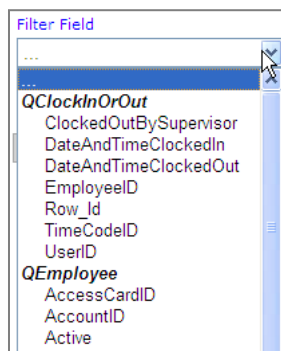


At any time, you may click the **Cancel** button to cancel the processing of a report if you accidentally entered filters that take a long time to execute.



Filter Field Drop-down Menu

The Filter Field drop-down menu is a list of the available fields in the table/view that have been selected or created in the **Data Sources** tab. Select the fields to filter. If joining tables/view, the title of the table/view that the field is from appears in parentheses next to the name of the field.



Operator Drop-down Menu and Values

The table below shows the **Operator** drop-down menu and values features.

Filter Field	Operator	Value(s)
Address	Begins With	s
City		
...	... Equals Equals (Select) In Time Period Like Begins With Ends With Is Less Than Is Greater Than Between True	

Features	Description
Operator drop-down menu	List of operations available to perform on the field selected in the Field drop-down menu to the left including (but not limited to): Blank, Isn't Blank, Use Previous Comparison: Is Less Than, Is Greater Than, Isn't Less Than, Isn't Greater Than, Isn't Between, Date and Time: Between, In Time Period, Less Than Days Old, Greater Than Days Old, Equals Days Old, Equivalence: Equals, Equals (List), Equals (Select), Equals (Multiple), Equals (Popup), Equals (Tree), Equals (Checkboxes), Doesn't Equal, Doesn't Equal (Select), Doesn't Equal Multiple, Doesn't Equal (Popup), Not Equals (Tree), Field Comparison – Is Less Than (Field), Is Greater Than (Field), Equals (Field),and Not Equals (Field).
Values	Enter the value to which the operation selected in the Operator drop-down menu will be applied (for example, Begins With A only displays items that have entries that start with "A" in the selected field).

The following screenshot provides an example of the **Equals (Checkboxes)** option which automatically provides a list of values with checkboxes and allows the user to select one or multiple values for the filter by check-marking the boxes.

Filter Field	Operator	Value(s)
1 DepartmentID	Equals (Checkboxes)	☐ AVI ☐ AVI-ADMIN ☐ AVI-AF ☐ AVI-BMX ☐ AVI-DEII

Blank and Param Checkboxes

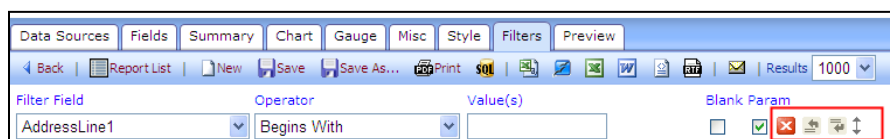
The blank and param boxes allow you to control the filtering behavior in the report viewer. They do not affect the **Preview** tab of the report designer.

Param Checkbox: To use this, first set a filter field, set an operator, and then set values. This will display the filtered report in the report viewer and allow the user to change the filter value. If it is not checked, then the filter will not be visible to the end-user and the end-user will not be able to change the filter.

Blank Checkbox: To use this, first set a filter field and then set an operator. If **Blank** is checked, the filter will return data which matches the Value(s) drop-down/textbox and also data which has a blank or null value in that field.

Function Buttons

The function buttons of the **Filters** tab are shown in the screenshot below.

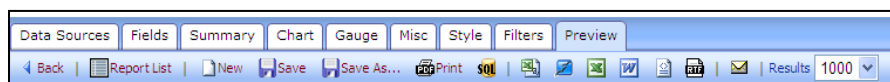


The table below describes the function buttons of the **Filters** tab.

Icons	Control Name	Description
	Delete button	Click this button to delete the row the button is on.
	Insert Row button (above)	Click this button to insert a row above the row the button is on.
	Insert Row button (below)	Click this button to insert a row below the row the button is on.
	Move the Row	Click this button to drag the filter to a new location.

Preview Tab

In the **Preview** tab, a preliminary version of the created table can be viewed, along with its **Summary Table**, description, and chart. You may go back and change selections in the previous tabs and see how they affect the table by returning to it in the **Preview** tab.



Toolbar

The **Toolbar** buttons are shown below.



Following is a description of the Toolbar button functions.

Report Viewer Buttons

Button Name	Function
Back	Allows the user to return to the previous page
Report List	Displays the list of reports
New	Creates a new report.
Save	Saves the report.
Save As...	Allows a new report name to be saved.
Print	Prints the report
SQL	Views the report in SQL mode.
Export Buttons	Exports the report in the selected format: Comma Separated (CSV) file, Open Office document, Microsoft Excel file, Microsoft Word document, XML document, or Rich Text Format (RTF) document. ✔ Ensure your browser language matches the host operating system language to avoid issues exporting the query.
Email Button	Emails the report
Results drop-down	Allows the user to select the number of results in the report shown on the screen (using powers of 10)

Access Rights and Permissions Tab

Access rights to reports can be administrated in a variety of ways. Users may view the report under the following conditions.

1. They are the creator or owner of the report.
2. They are not the report creator, but it has been made available to everyone and they have access rights to the screens related to the QView data sources used in the report.
3. They are not the report creator, but it has been made available to everyone and they have been granted access rights to the database tables and views used in the report via

the portal's module settings. Either their User or a User Group they belong to must have been granted rights to the database table or view.

These 3 conditions noted are always enforced and must be met for the user to view the report.

On top of these conditions, there is an extra layer of access rights that customers may opt into. When conditions 2 and 3 above are met, Administrators can specify what Users and User Groups may be allowed to view the report. This is beneficial when two types of users both have access to the same screen, but one of them should not be able to see the other's reports. For example, a supervisor may create a cross-team performance report that they do not want everyone with access to that screen to be able to view.

To opt into this level of access rights control, do the following:

1. Sign into web modules.
2. Go to the Admin Center.
3. Click on the **Options** hyperlink.
4. Turn on **Require access rights for all ad hoc reports**.
5. Click **Save**.

In order for Users to view reports they did not create, they will need to be granted explicit view-rights to the report.

To grant these rights, do the following:

1. Go to Admin Center > Options > "Ad Hoc Access Rights" or go to Query Portal > Module Settings > "Access Rights". These both will take you to the same page.
2. By default, **Reports** will be selected.
3. Select the report to assign access rights to in the dropdown list.
4. Optionally, set the **Default permissions for new records**. These will be the default values when you add Users or User Groups. Values can be changed later at any time.
5. Select User or User Groups to add for the report.
6. In the Permissions table, fine tune the permissions you want your Users/User Groups to have.
7. Click **Save**.

Permissions

There are three types of permissions that can be controlled for Users/User Groups:

1. **May View** – Allows the user to view the report. If the user/group does not exist in the Permissions table, the default assumption is that view-rights are denied.
2. **May Edit** - Allows the user to edit the report. They may alter any aspect about it.
3. **May Delete** - Allows the user to delete the report from the system.

6. Joining Data Sources

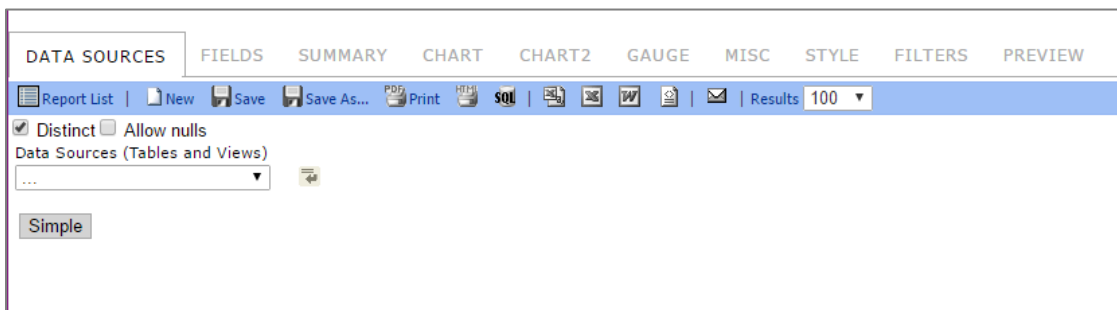
When creating an ad hoc report using the Ad hoc Query module, it is often necessary to combine data from multiple sources. This is called a join because it is joining two or more data source fields using some shared data.

To join fields for a report:

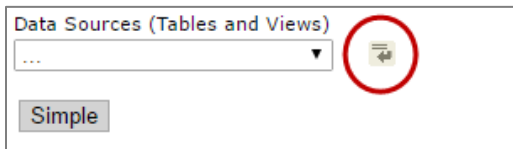
1. From the main page of the Query portal, click **Design A New Report**.



The designer page opens.



2. In the **Data Sources (Tables and Views)** drop-down menu, add the data sources you are joining.
3. To add more data sources, click the join button.



Once you have chosen two data sources, other fields display to link those data sources together.

DATA SOURCES FIELDS SUMMARY CHART CHART2 GAUGE MISC STYLE FILTERS PREVIEW

Report List | New | Save | Save As... | Print | SQL | | | | Results 100

☒ Distinct ☐ Allow nulls

Data Sources (Tables and Views)

QWorkOrderCenter

QWorkOrderTask

WorkOrderLocationID = QWorkOrderCenter WorkOrderLocationID

Simple Continue to Fields

- In the first new drop-down field, find the field name you want to link to another field.

In this example, the field is the **WorkOrderLocationID** field from **Work Order Task** data.

DATA SOURCES FIELDS SUMMARY CHART CHART2 GAUGE MISC STYLE FILTERS PREVIEW

Report List | New | Save | Save As... | Print | SQL | | | | Results 100

☒ Distinct ☐ Allow nulls

Data Sources (Tables and Views)

QWorkOrderCenter

QWorkOrderTask

WorkOrderLocationID = QWorkOrderCenter WorkOrderLocationID

Simple Continue to Fields

- In the next two fields, choose the next page and field to link to the first page and field.

In this example, the field being linked is the **Work Order Center** screen's **WorkOrderLocationID** field.

DATA SOURCES FIELDS SUMMARY CHART CHART2 GAUGE MISC STYLE FILTERS PREVIEW

Report List | New | Save | Save As... | Print | SQL | | | | Results 100

☒ Distinct ☐ Allow nulls

Data Sources (Tables and Views)

QWorkOrderCenter

QWorkOrderTask

WorkOrderLocationID = QWorkOrderCenter WorkOrderLocationID

Simple Continue to Fields

- If there is only the one field to link, continue on creating your query. If the items you are linking have more than one field associated with them, click the **Filters** tab to open the filters.

DATA SOURCES FIELDS SUMMARY CHART CHART2 GAUGE MISC STYLE FILTERS PREVIEW

Report List | New | Save | Save As... | Print | SQL | | | | Results 100

1 Filter Field Operator Value(s) Description Blank Param Require

1

Require ... Parameters in Viewer

Filter Logic Ex:(1 OR 2) AND (3 OR 4)

Because work order IDs have multiple fields connected, filters are needed to join the other two fields together.



Note: We suggest unchecking the **Param** checkbox to make sure these filters do not show in the report itself.

7. On the Filters tab, set the following options.

	Filter Field	Operator	Value(s)	Description	Blank	Param	Require
1	WorkOrderNumber	Equals (Field)	WorkOrderNumber		☐	☐	☒
2	WorkOrderYear	Equals (Field)	WorkOrderYear		☐	☐	☒
3	...	...			☐	☒	☒

☐ Show Filters In Report Description

Require: ... Parameters in Viewer

Filter Logic: Ex: (1 OR 2) AND (3 OR 4)

- i. Enter the next field into the **Filter Field** field.
 - ii. Set the Operator field as **Equals (Field)**.
 - iii. Set the **Values** field to the field you need to join the first field in that line to.
 - iv. Uncheck the **Param** checkbox.
8. Do this for any other fields you need to join for data sources.
 9. Continue building the query as needed.

7. Pivots Section

The Ad Hoc Query module Pivot feature allows users to generate analytical data grids from within the Ad Hoc Query reports. The Pivot feature essentially adds extra pivot columns to the right side of the report. This is useful for comparing data over multiple categorical dimensions.

Sample Pivot View of the average amount spent on freight:

Ship Country	2006	2007	2008
UK	56.635	39.618	74.961
USA	85.754	96.99	153.322

Create Initial Report

1. Click on the **Data Sources** tab and select desired data sources. (Ex. Orders)
2. Click on the **Fields** tab.
3. Select the desired Fields names and attributes (Sorting, VG, Function, and Format) for the report. (Ex. ShipCountry)

Before Pivot:

Field	Description
ShipCountry	Ship Country
...	

Create Pivot View on above Report

1. Under Fields tab, click the **Add Pivot** button.
2. Click the **Add pivot columns for** drop-down.
3. Select the field you wish to display across the top of the pivot view (for example, OrderDate), also select the function type from drop down (for example, Group(Year & MN)).
4. Click the **calculate cell values on** drop-down.
5. Select the field you wish to display down the left side of the pivot view (Ex. Freight), also select the function and format types from the drop downs (ex. Average and \$0.00).



Note: This field's data will also populate the rows within the pivot view.

6. Optional: Click the **Add subtotals using** drop-down. Select the desired function. (Ex. Sum)
7. Click **Preview**

After Pivot:

Field	Description	Sort(a-z)	Sort(z-a)	VG	A	Function
ShipCountry	Ship Country	☐	☐	☐	☐	Group
...		☐	☐	☐	☐	...

Add pivot columns for using function

Calculate cell values on field with function and

Add subtotals using function.

Essentially, the pivot capability adds additional columns based on the data to the right of the report. In this example, the first column is essentially a standard report and the 2006, 2007 and 2008 columns were added by the pivot capability

Standard Report View	Columns added by Pivot												
<table><tr><th>Ship Country</th></tr><tr><td>UK</td></tr><tr><td>USA</td></tr></table>	Ship Country	UK	USA	<table><tr><th>2006</th><th>2007</th><th>2008</th></tr><tr><td>56.635</td><td>39.618</td><td>74.961</td></tr><tr><td>85.754</td><td>96.99</td><td>153.322</td></tr></table>	2006	2007	2008	56.635	39.618	74.961	85.754	96.99	153.322
Ship Country													
UK													
USA													
2006	2007	2008											
56.635	39.618	74.961											
85.754	96.99	153.322											

Using the above concepts, the following example develops a more sophisticated report that shows a monthly time-series report for each county visually grouped by employee.

Example for setting up the report:

1. First, setup the non-pivot part of the report, the Non-Pivot Report View:

Buchanan	
Group(Ship Country)	Freight
Belgium	\$2,047.88
Brazil	\$5,220.52
Finland	\$140.64
France	\$346.72
Germany	\$1,517.40
Italy	\$239.12
Mexico	\$333.96
Poland	\$48.16
Portugal	\$293.12
Spain	\$779.60
Sweden	\$679.24
Switzerland	\$91.92
UK	\$1,726.84
USA	\$1,437.36
Venezuela	\$772.36
	\$15,674.84

2. Select and visually group by employee (by clicking the VG checkbox for that field).
3. Sort on ShipCountry and Sum the Freight.
4. Add subtotals using the Sum function to give us a summary line for each employee.

Report Designer Setup without Pivot:

Now that the non-pivot is complete, a monthly pivot may be done as shown below:

Field	Description	Sort(a-z)	Sort(z-a)	VG	A	Function
LastName	Group(Last Name)	☒	☐	☒	☐	Group
ShipCountry	Group(Ship Country)	☒	☐	☐	☐	Group
Freight	Freight	☐	☐	☐	☐	Sum
...		☐	☐	☐	☐	...

Add subtotals using **Sum** function.

5. Select the OrderDate to pivot on.
6. Select the Group (Year & MN) for the formatting of the column names.
7. Select the sum of freight for the cells.

Add pivot columns for	OrderDate	using	Group(Year & MN)
Calculate cell values on	Freight	field with	Sum
Add subtotals using Sum function.			
Remove Pivot Continue to Filters Preview			

The following is the results of the report with Pivot:

Buchanan						
Group(Ship Country)	Freight	2006 - July	2006 - August	2006 - September	2006 - October	2006 - November
Belgium	2047.88	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Brazil	5220.52	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Finland	140.64	\$0.00	\$0.00	\$0.00	\$140.64	\$0.00
France	346.72	\$129.52	\$0.00	\$22.96	\$0.00	\$78.56
Germany	1517.4	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Italy	239.12	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Mexico	333.96	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Poland	48.16	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Portugal	293.12	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Spain	779.6	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Sweden	679.24	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Switzerland	91.92	\$91.92	\$0.00	\$0.00	\$0.00	\$0.00
UK	1726.84	\$0.00	\$0.00	\$0.00	\$0.00	\$1,153.72
USA	1437.36	\$18.24	\$0.00	\$0.00	\$0.00	\$0.00
Venezuela	772.36	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	15674.84	\$239.68	\$0.00	\$22.96	\$140.64	\$1,232.28

8. Function Descriptions

The following is a table of some functions available for use in the **Fields** and **Summary** tabs of the report designer.

Function Name	Description
Group	Groups field values together for aggregating
Count	Counts the number of values in a column
Count Distinct	Counts the number of distinct values in a column
Sum	Sums the value in a field
Average	Takes the average value of a field
Maximum	Takes the maximum value in a field
Minimum	Takes the minimum value in a field
Group(Date),(Day),(Month),(Year)	Groups a date field by its value
Group(Month Name)	Groups a date field by its month value and displays the name (March) instead of (03)