exigo

Report Builder

v 1.0

Contents

Report Builder

You may use the report builder to create custom reports using different report fields, filters, sort orders, and options.

Important: All orders and actions are date and time stamped. All days end and begin at Midnight (00:00), to include the current day in a report you must use the next calendar date as your report end date!

CUSTOM REPORTS

Click on the **Reports** button under the Accounting Menu on the left menu of the page.

Next, click on **Build a Report** in the Report Builder section of the Accounting Reports page.
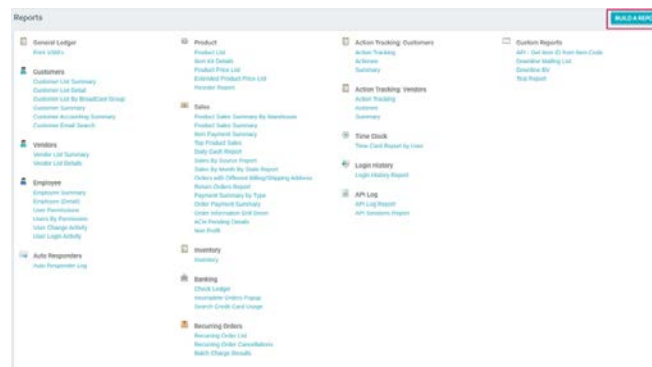
Report Builder Documentation

CREATE NEW REPORT

Click on the **Reports** button under the Accounting Menu on the left menu of the page.

Next, click on **Build a Report** in the Report Builder section of the Accounting Reports page.
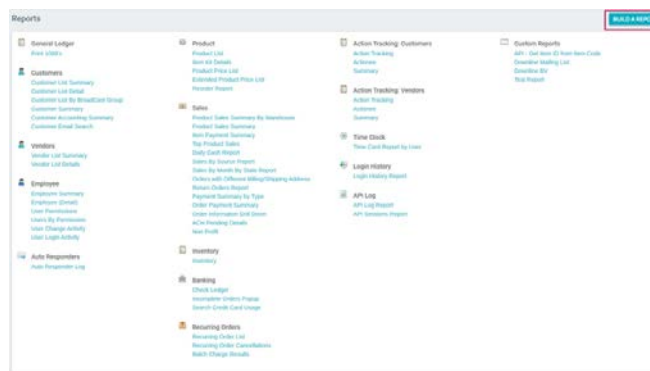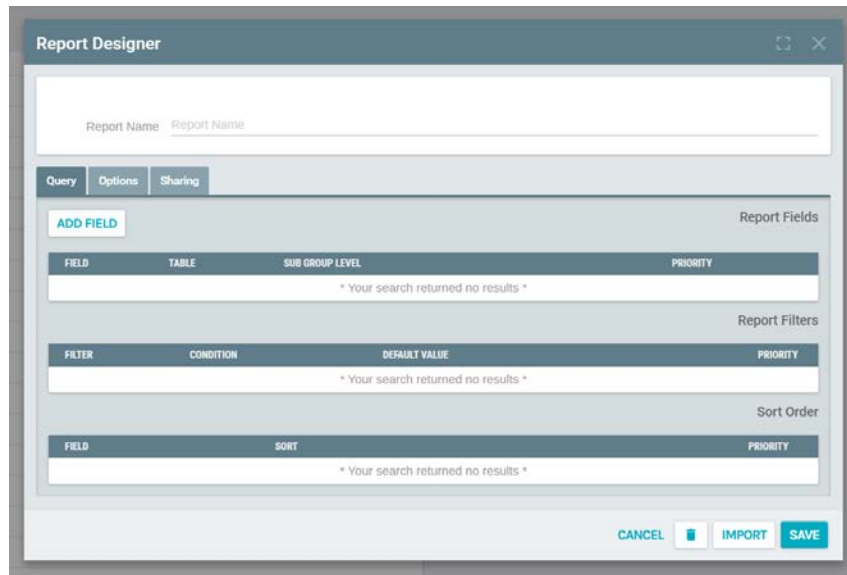

Click on **Create a New Report** in the My Report section of the Company Reports page.

The Report Designer screen will open up to the Query section.

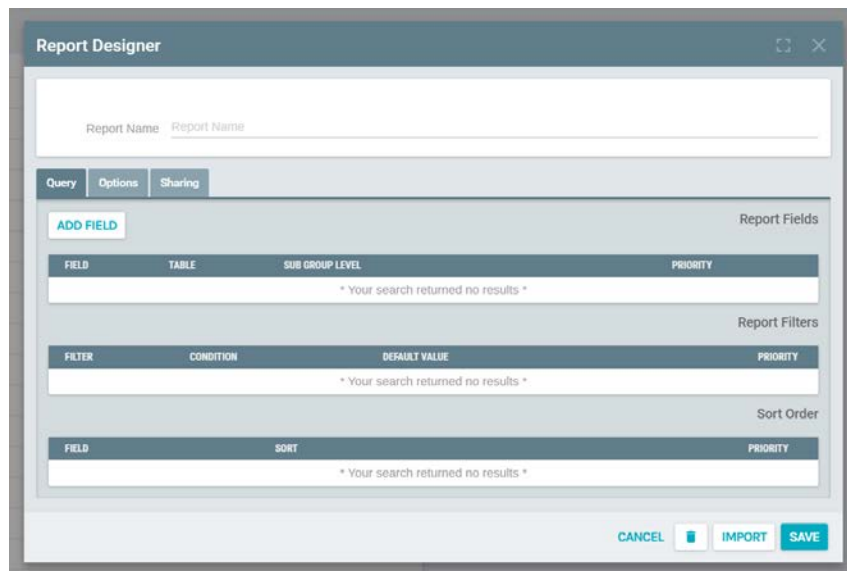Next, **Name the Report** that is going to be created on the top Right of this page.

This is where the reports are created. You can enter the desired Report Fields, Filter, and Sort Order to build a custom Report.
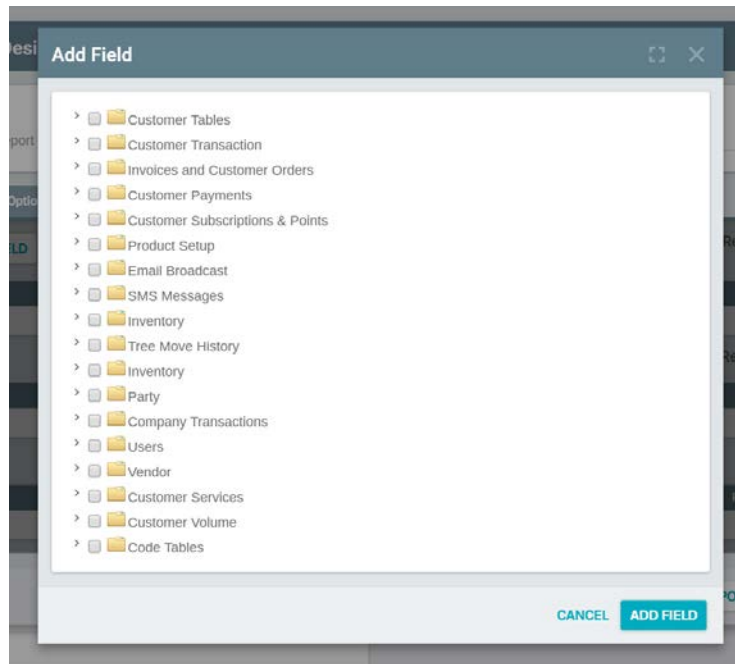
Report Fields

ADDING A REPORT FIELD

To Add a Report Field Click on the **Add Button** above the Report Field Section on the Report Designer screen.

The Add Field screen will open.

Click and highlight the desired field, then click **Add Field Button** or double the desired field.

Note: Only one field can be added at a time.

The added fields will show up in the Report Designer screen.

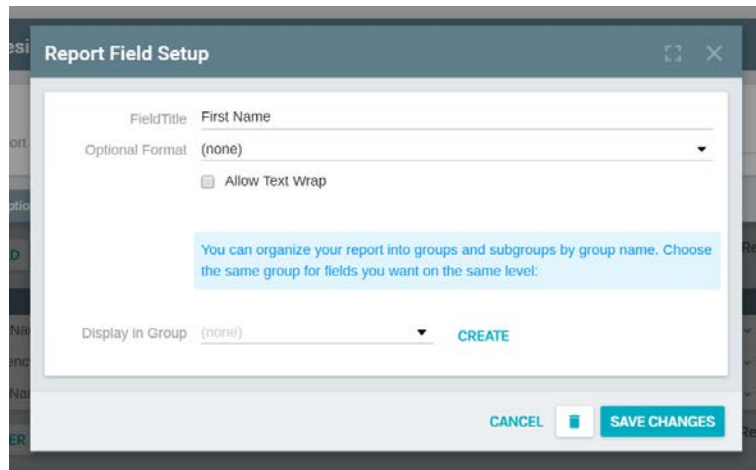**REMOVING A REPORT FIELD**

To Remove a Report Field, highlight the field that is to be removed and Click the **Remove Button**

The Field will be removed from the Report Designer screens and will no longer be part of the report.

EDITING A REPORT FIELD

To Edit a Report Field, highlight the field that is to be edited and Click the **Edit Button**

The Edit Field Properties screen will open

The Edit Field Properties screen allows:

- Field Titles

- Optional Formats

- Allows Text Wraps

- Subgroup Headers

Make edits to the Edit Field Properties screen and press OK.

MOVING A REPORT FIELD UP

To move a Report Field Up, highlight the field that is to be moved and Click on the Move Up Button.

The Field will be moved up one space in the Report Designer screen.

Note: The order of Report fields in the Report Designer screen is the same order they will appear in the report.

MOVING A REPORT FIELD DOWN

To move a Report Field Down, highlight the field that is to be moved and Click the **Move Down**
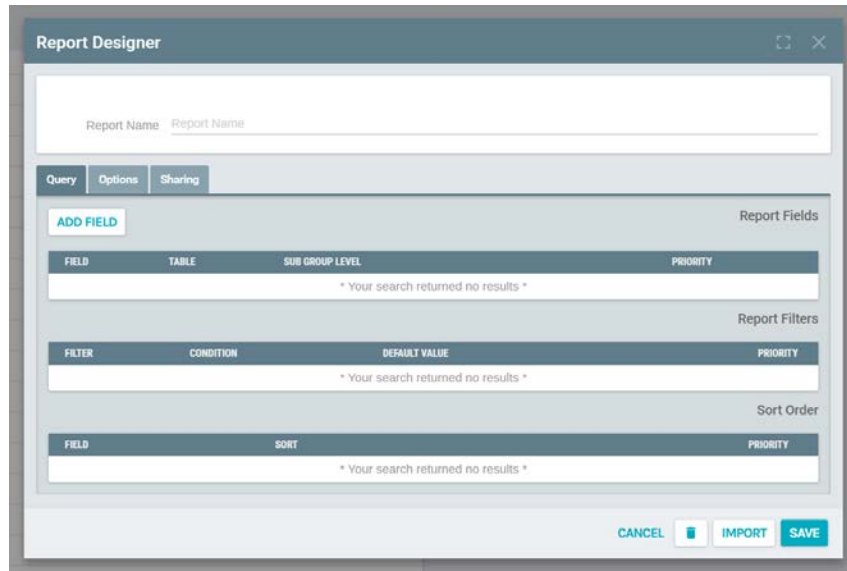
Button

The Field will be moved down one space in the Report Designer screen.

Note: The order of Report fields in the Report Designer screen is the same order they will appear in the report.
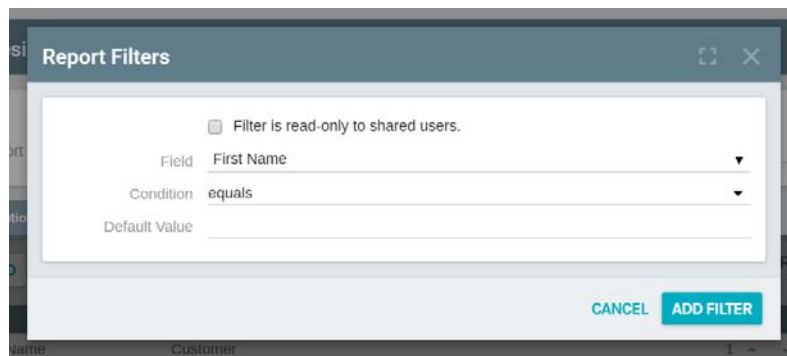
Report Filters

ADDING A REPORT FILTER

To Add a Report Filter Click on the **Add Button** above the Report Filter sections on the Report Designer screen.

The Add Filter screen will open.

Click the arrow to scroll to the desired Field

Click the arrow to scroll to the desired Filter condition. Enter a default value if needed.

Click **OK**

The added fields will show up in the Report Designer screen.

REMOVING A REPORT FILTER

To Remove a Report Filter, highlight the filter that is to be removed and Click the **Remove Button**

The Filter will be removed from the Report Designer screens and will no longer be part of the report.

EDITING A REPORT FILTER

To Edit a Report Filter, highlight the filter that is to be edited and Click the **Edit Button**

The Edit Filter screen will open.
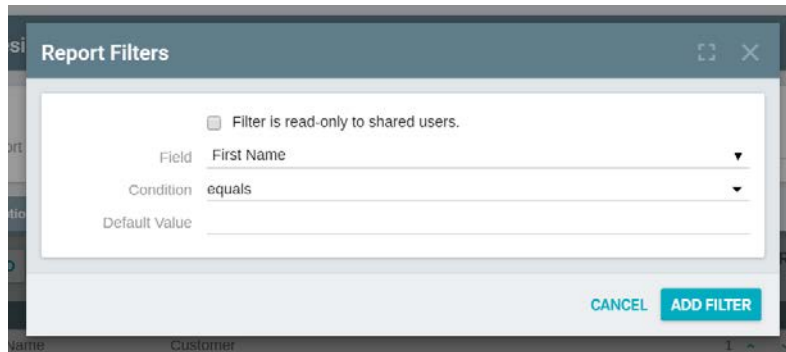
The Edit Filter screen allows you to edit the Filter information:

Click the arrow to scroll to the desired Field.

Click the arrow to scroll to the desired Filter condition. Enter a default value if needed.

Click **OK**

The Edited filter will show up in the Filter Section of the Report Designer screen.

MOVING A REPORT FILTER UP

To move a Report Filter Up, highlight the field that is to be moved and Click the **Move Up Button**

The Filter will be moved up one space in the Report Designer screen.

Note: The order of Report filter in the Report Designer screen is the same order they will appear in the report.

Moving a Report Filter Down

To move a Report Filter Down, highlight the field that is to be moved and Click the **Move Down Button**
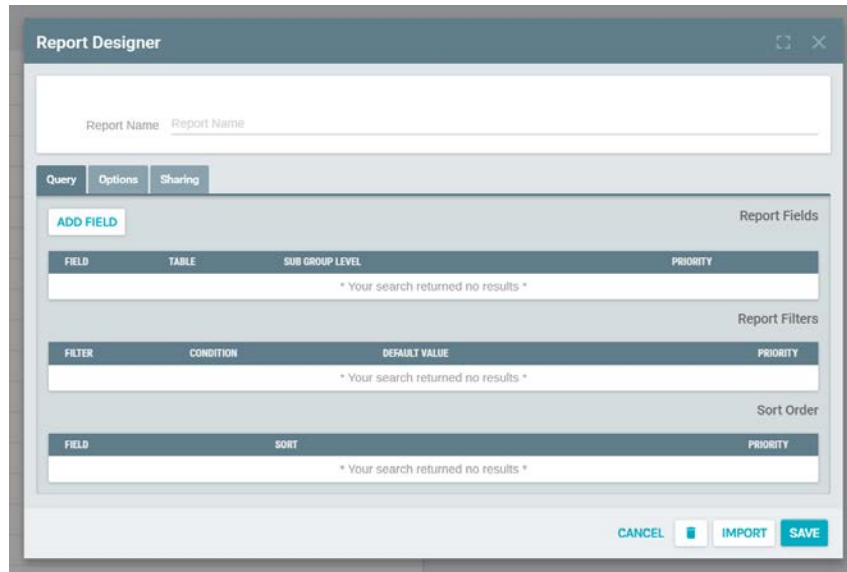
The Filter will be moved down one space in the Report Designer screen.

Note: The order of Report filters in the Report Designer screen is the same order they will appear in the report.
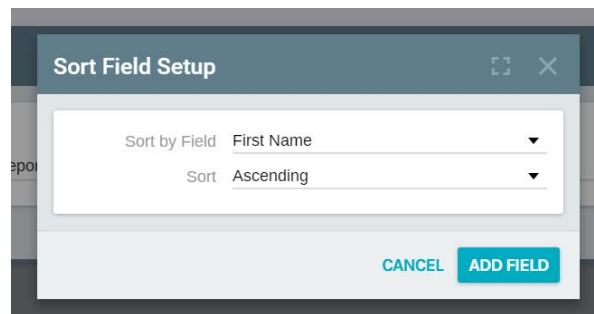
Report Sort Order

ADDING A REPORT SORT ORDER

To Add a Report Sort Order Click the **Add Button** above the Report Sort Order section on the Report Designer Screen.

The Add Sort Order screen will open.

Click the arrow to scroll to the desired Sort by Field.

Click the arrow to scroll to the desired Sort. Click **OK**

The added Report Sort Order will show up in the Report Designer screen.
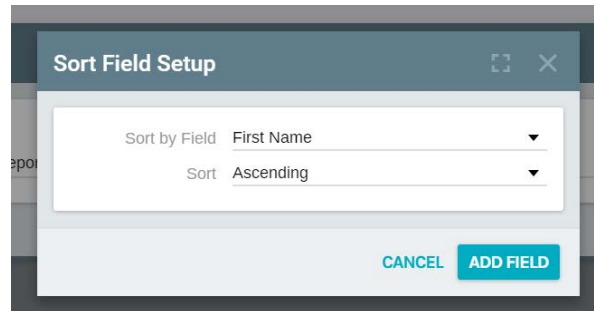

REMOVING A REPORT FILTER

To Remove a Report Sort Order, highlight the field that is to be removed and Click the **Remove Button**

The Sort Order will be removed from the Report Designer screens and will no longer be part of the report.

EDITING A REPORT SORT ORDER

The Edit Sort Order screen allows you to edit the Sort information in a report.

To Edit a Report Sort Order, highlight the field that is to be edited in the Report Designer Screen,

Click the **Edit Button**

The Edit Sort Order screen will open.

Click the arrow to scroll to the desired Sort by Field

Click the arrow to scroll to the desired Sort Click **OK**

The Edited Report Sort Order will show up in the Report Designer screen.

MOVING A REPORT SORT ORDER UP

To move a Report Sort Order Up, highlight the field that is to be moved and Click the **Move Up Button.**

The Sort Order will be moved up one space in the Report Designer screen.

Note: The order of Report Sort Order in the Report Designer screen is the same order they will appear in the report.

MOVING A REPORT SORT ORDER DOWN

To move a Report Sort Order Down, highlight the field that is to be moved and Click the **Move Down**

Button.

The Sort Order will be moved down one space in the Report Designer screen.

Note: The order of Report Sort Order in the Report Designer screen is the same order they will appear in the report.

REPORT OPTIONS

In the Report Designer Screen the Report can be refined under the Options Tab.
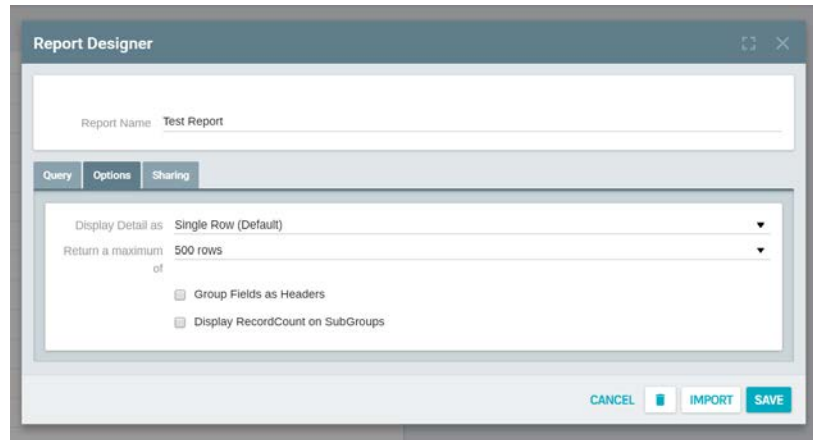
The Options Tab allows you to:

• Display Details in a variety of Rows and Columns

• Group Fields as Headers

• Display RecordCount on Sub Groups

CREATING THE FINISHED REPORT

When all of the sections are completed with the desired Report fields, Filters, Order Sorts, and Options on the Report

Designer Screen Click **SAVE** and the Report will be generated.

Important: All orders and actions are date and time stamped. All days end and begin at Midnight (00:00), to include the current day in a report you must use the next calendar date as your report end date!

COPY EXISTING REPORT

You can Copy an existing report under a different Report Name and Edit it to build a new report.

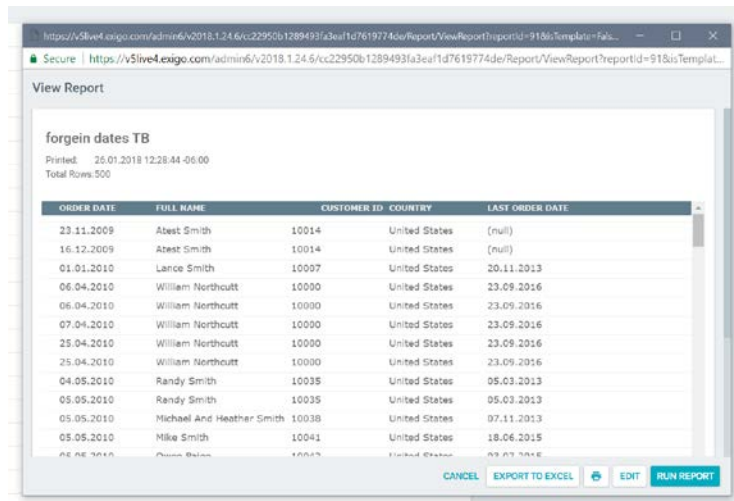Click the **Reports Button** under the Accounting Menu on the left menu of the page.

Next, click **Build a Report** in the Report Builder section of the Accounting Reports page.
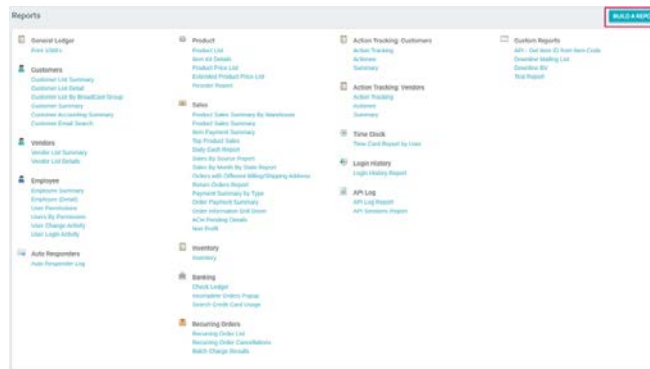
Click **Report that is to be Copied** in the My Report section of the Company Reports page.
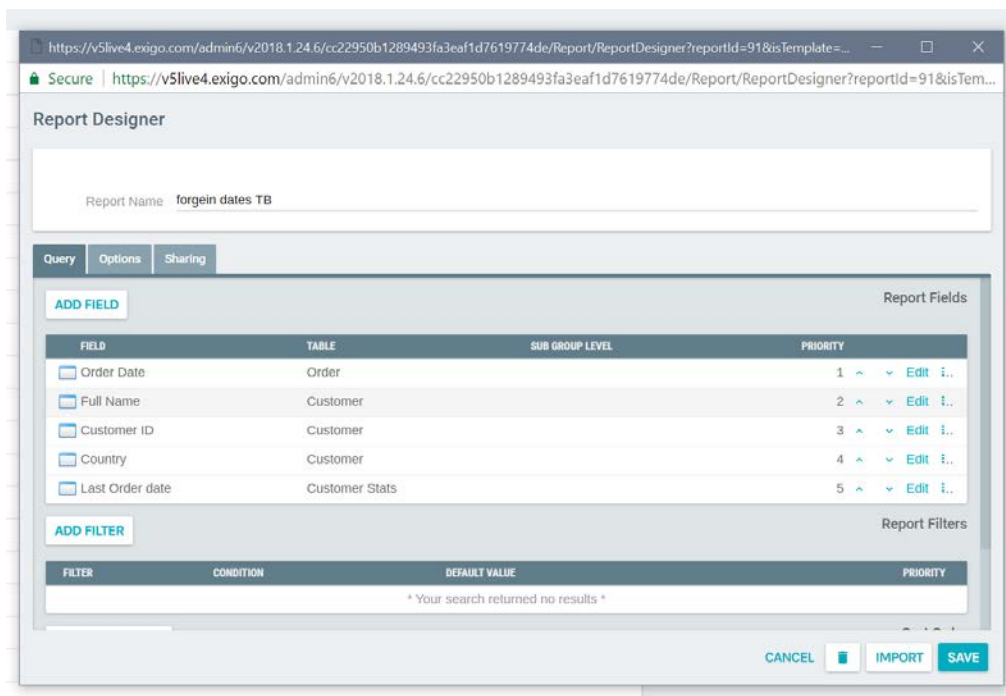

The Report will be generated and the Report Screen will open.

To Copy the Report Click the **Copy Report Button**

The Report Designer Screen will open with the words "Copy of (and the Report name)" in the report name section of the screen.

Edits can be made from the Report Designer Screen or an exact Copy can be made and saved.

Click on **Save** and a New Copy of an existing report or a new Edited Report will be Generated.

IMPORT REPORTS, SHARED, AND TEMPLATES

You can Import an existing report, shared reports and templates into the Report Designer Screen to Edit or build on an existing report.

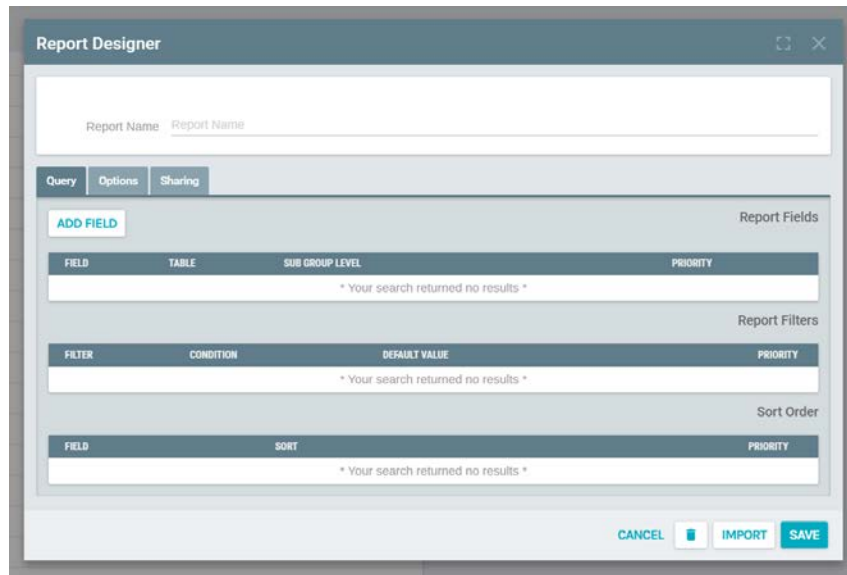Click the **Reports Button** under the Accounting Menu on the left menu of the page.

Next, click **Build a Report** in the Report Builder section of the Accounting Reports page.
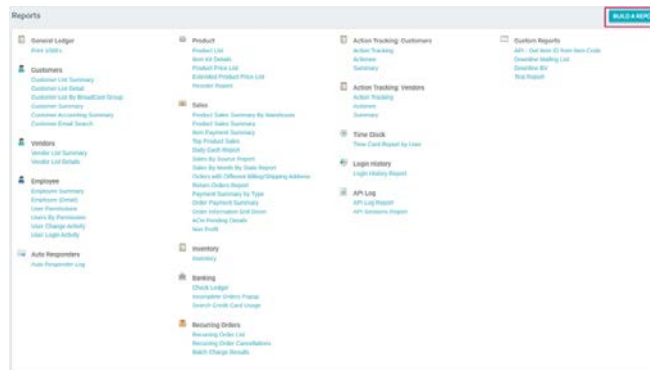
Click on **Create a New Report** in the My Report section of the Company Reports page.
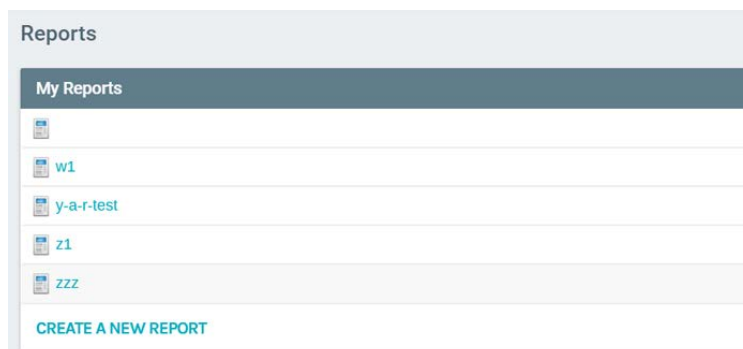
The Report Designer screen will open up to the Query section.

Next, **Name the Report** that is going to be imported on the top Right of this page.

Click the **Import Button**

The Choose to Import From Screen will open Highlight the desired report or template, and click OK

The reports, shared reports, or templates will be imported into the Report Designer Screen.
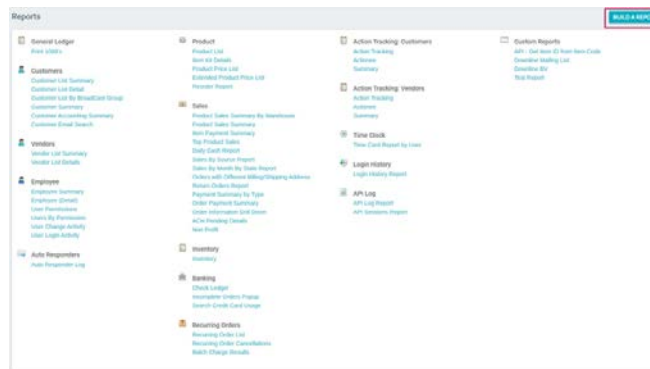
Click **Save** and the report will be generated.

SHARING A REPORT

You can share a report with different users.

Click the **Reports Button** under the Accounting Menu on the left menu of the page.
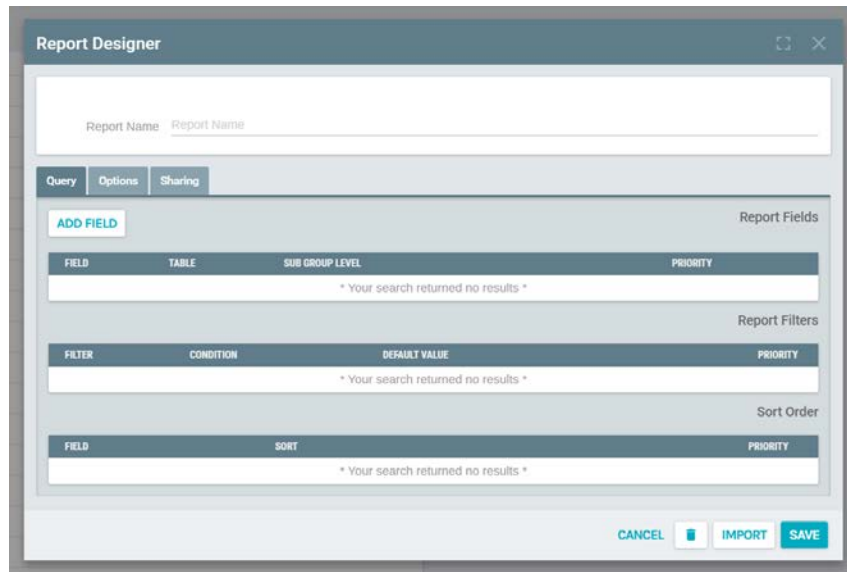
Next, click **Build a Report** in the Report Builder section of the Accounting Reports page.
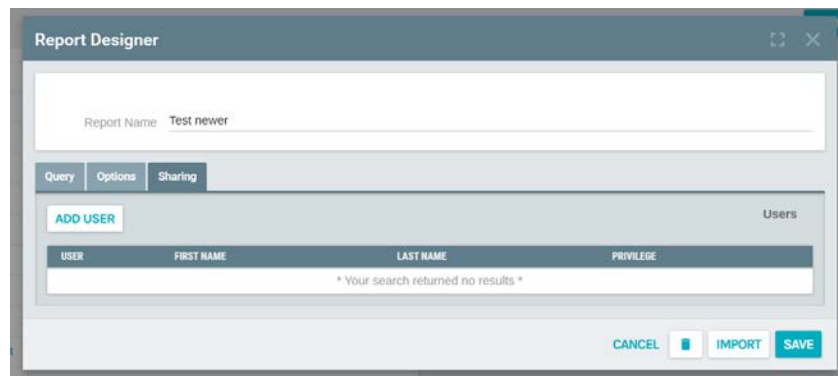

Click on **Create a New Report** in the My Report section of the Company Reports page.

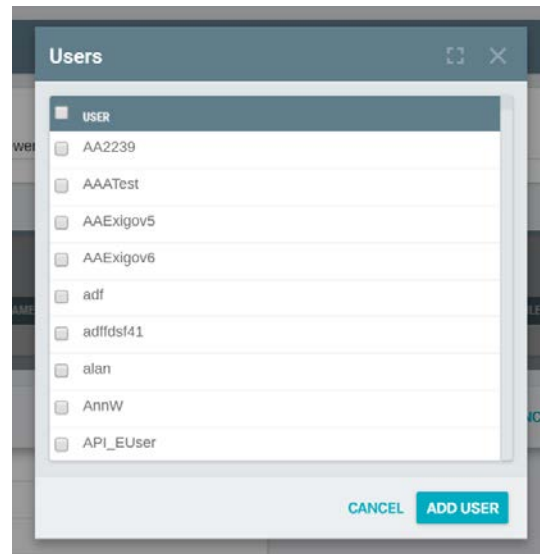The Report Designer screen will open up to the Query section.

In the Report Designer Screen the Report can be shared clicking the Sharing Tab.

ADDING USERS TO SHARED REPORTS

Click **Add** in the Sharing Tab in the Report Designer Screen.
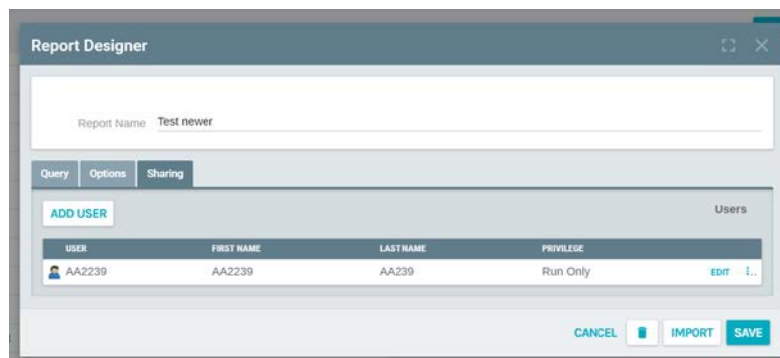
The Add user Screen will open up.

Highlight the user that is going to share the report.

Click **Add User**

The User will be added to the Sharing Tab Screen in the Report Designer Screen.
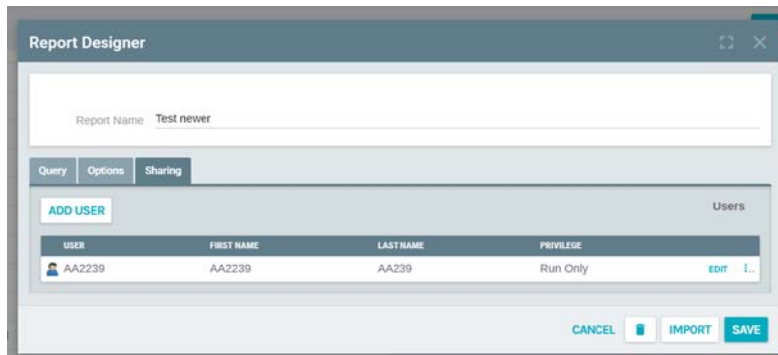
REMOVING USERS FROM SHARED REPORTS

Highlight the user that is going to be removed from the Sharing Tab Screen.

Click the **Remove Button**

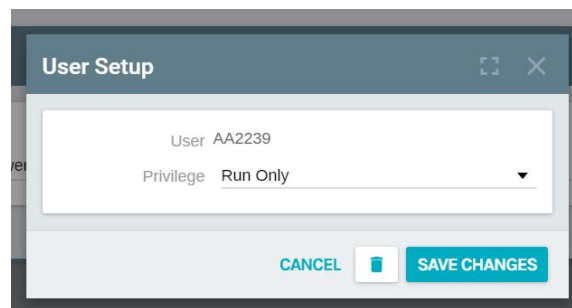The User will be removed from the Sharing Tab Screen.

EDITING USERS IN SHARED REPORTS

Highlight the user that is going to be edited from the Sharing Tab Screen.

Click the **Edit Button**

The Permission Edit Screen will open.

Click in the circle next to:

- Run only (users can only run reports changes cannot be made to shared report)

- Run and Modify (users can run and make changes to shared reports)

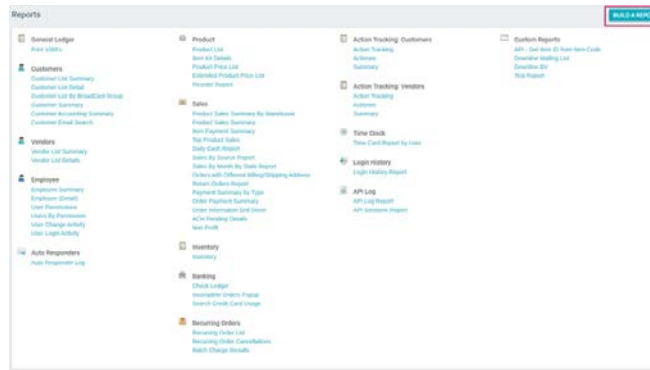Click **OK** and the shared report will be edited.

Exporting Data from a Report

You can export data report to an Excel file.

Click the **Reports Button** under the Accounting Menu on the left menu of the page.
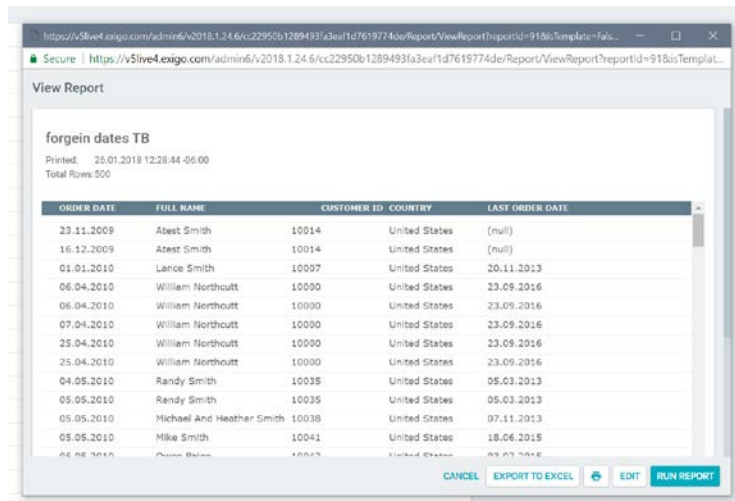
Next, click **Build a Report** in the Report Builder section of the Accounting Reports page

Click **Report that is to be Exported** in the My Report section of the Company Reports page.

The screen will open up to the generated report.

In the Report screen the Report can be exported be clicking the **Export to Excel Button.**

The computer will give a prompt to open or save the file.

Note: It is better to save the file first, and then open it at a later time.

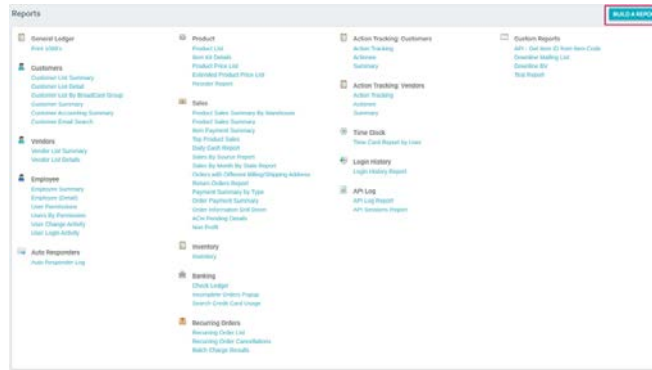Click the **Save Button** and the file will be exported to excel.

REMOVING A REPORT

You can remove a report from the system

Click on the **Reports Button** under the Accounting Menu on the left menu of the page.
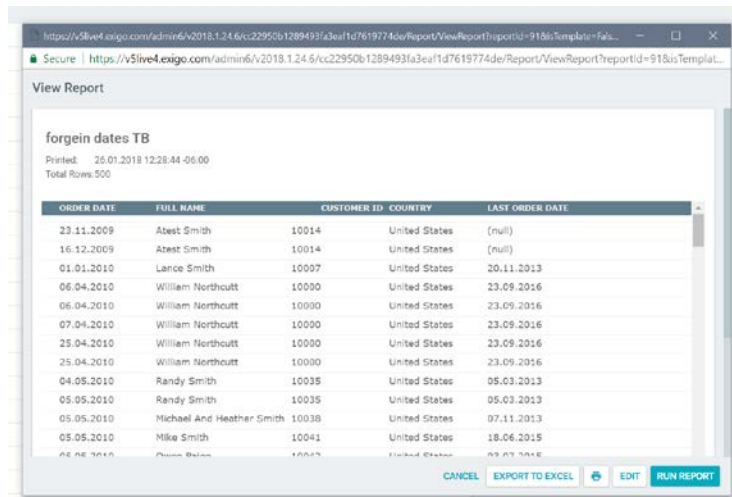

Next, click on **Build a Report** in the Report Builder section of the Accounting Reports page.
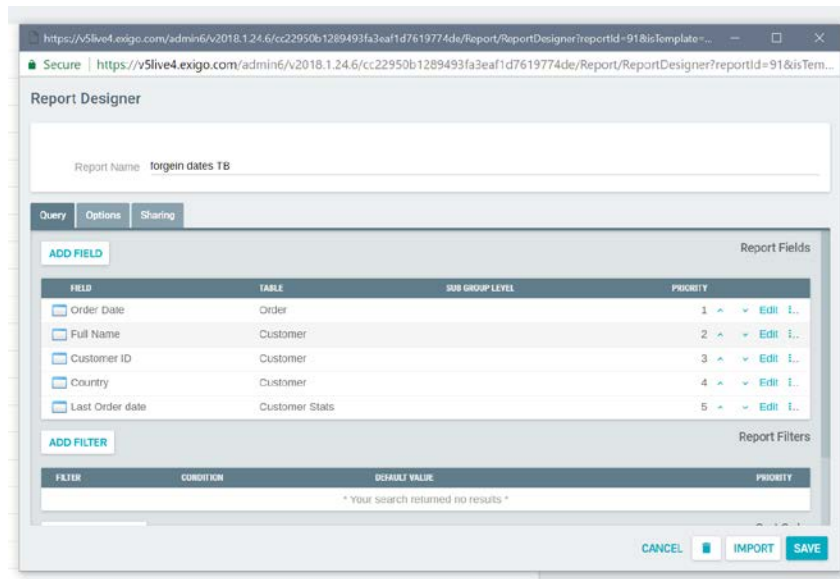
Click on **Report that is to be Removed** in the My Report section of the Company Reports page.

The screen will open up to the generated report.

In the Report screen the Report can be removed be clicking the **Edit Report Button**.

The Report Designer screen will open up to the Query section.

To Delete the Report click the **Delete Button** in Report Designer.

Click **OK** and the Report will be removed from the system