User Guide

Ultriva Custom Reports

Version 1.0

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Revisions

Date	Modifications	Author	Comments
9/28/2012	Created	Pushparaj S	

Symbol Legend

Symbol	Description	Location
	You wanted this feature!!!	Margin

1   Ultriva Custom Reports

Ultriva 7.0 Suite contains various pre-defined reports and pre-defined Excel Reports. However there are always few requests from customers about adding additional reports to the Application. Hence we added a new module called "Custom Reports Builder" which will allow users to create their own reports. Custom Reports can be created as "personal" or "public". When a report is defined as shared with others then other users will be able to run the same however the other users will not be able to edit the definition of the shared report.

In this release (Phase 1), Users will be able to create three types of report output:

1.   Tabular format report

2.   Group – Detailed report

3.   Group – Summary report.

In next release (Phase 2), we will add provision for users to add "Charts" and Cross tab format reports.

1.1   Custom Reports

To create a custom report user must have access to Custom Reports module under Reports. There are three main menu options under "Custom Reports".
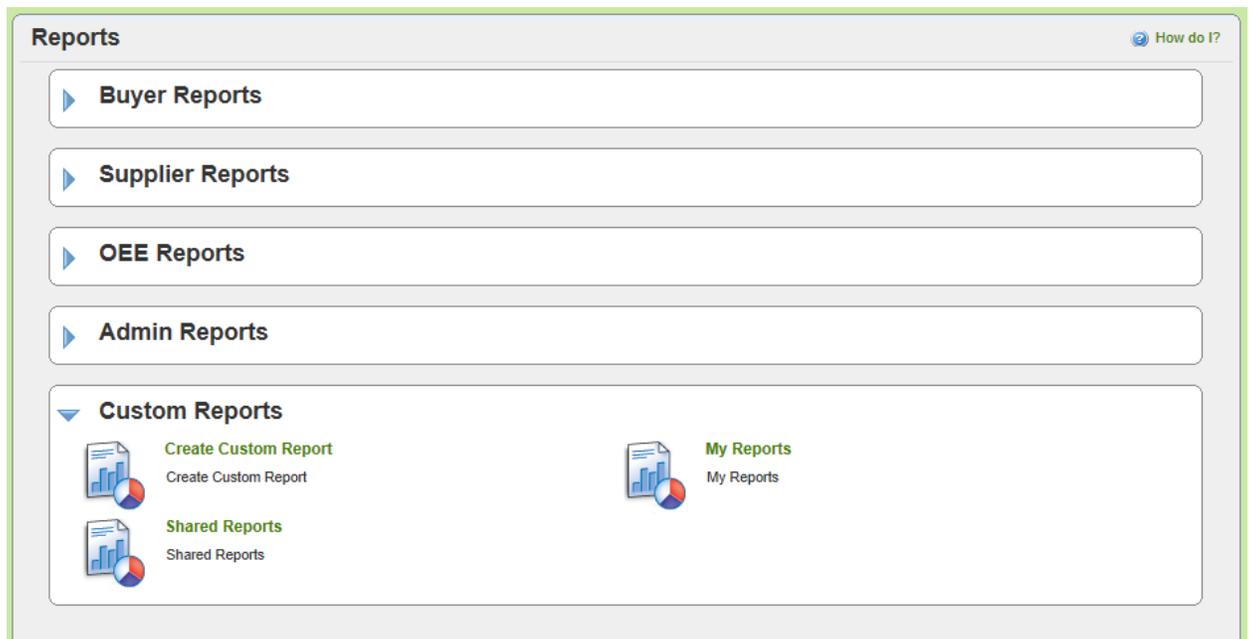
1.   Create Custom Report

     a.   This option allows users to quickly create a custom report.

2.   My Reports

a. This option shows all the report definitions created by current logged in user.

b. Users can add, edit and view the report definition by clicking Add, Edit and View button.

c. Users can run the report from this list by clicking the Run Report button.

d. Users can delete the report definition from delete button.

3. Shared Reports

a. This option shows all the report definitions shared by users in the system.

b. Users can run the report from this list.

c. Users can view the report definition by clicking the View button.

2 Creating Custom Reports

This section explains how to create report definition, adding filter condition, adding aggregate fields for Group Report, adding use defined Formula fields to the report.

To define the report definition user must invoke the Create Custom option. This shows following options:
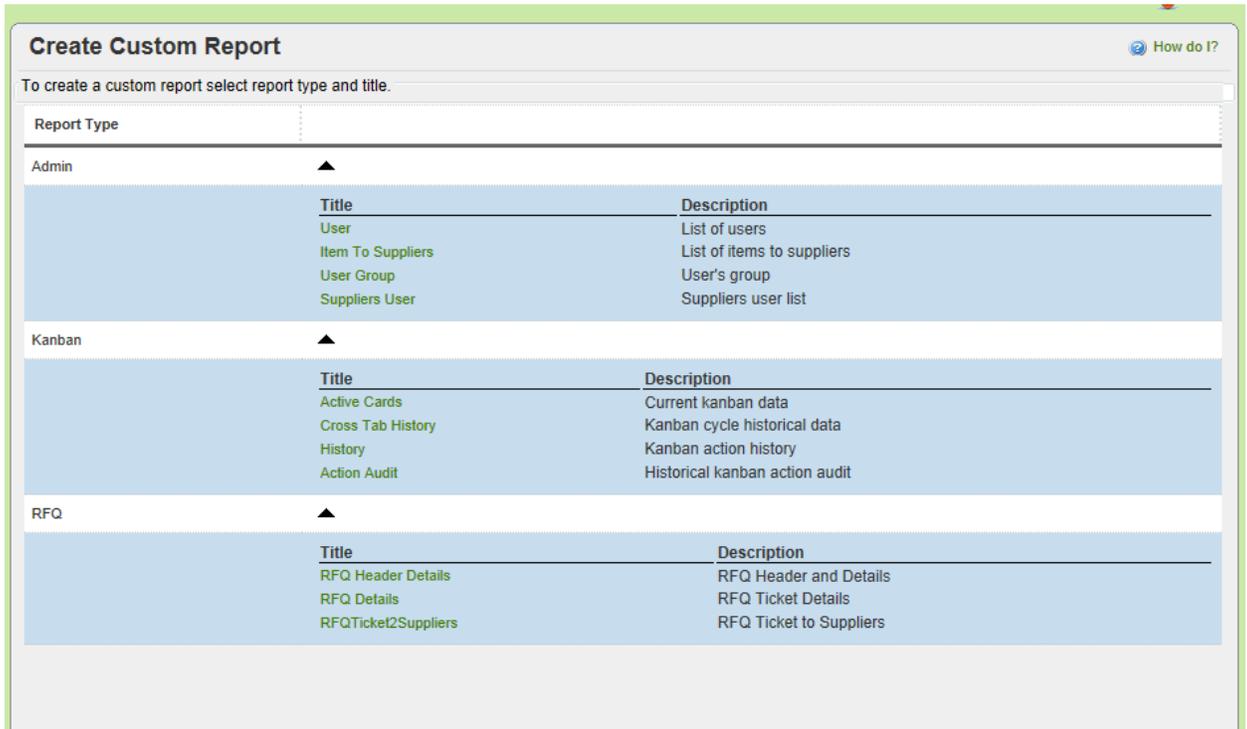
User should pick one of the options in the list.

In the following screen user must enter name, description, add any additional filters, select fields.

Then click Save to save the report definition.

Following steps shows how to define report definitions for each report format.

2.1 Creating Tabular format report

The tabular format report is the simplest report format. It shows the output in a tabular data grid format.

Please follow the following steps to create a sample report.

1. Click on create custom report.

2. Select User from the list.

3. Following screen shows up.

a. Enter Name such as "Users List".

b. Enter a brief description such "List of Users in the system"

c. Select "visible only to me" option so that the report is not shared.

      i. Later if you would like to share it you can change it.

d. Select output format "Tabular"

4. Now select any filter condition if needed.

5. Select the output fields that need to be shown in the output.

6. Select sort condition.

a. If the field has to be sorted by Descending order then please click the "Desc" button.

7. Add any formula fields.

    a. Formula fields are explained in the section "Add Formula Fields".

8. Click Save.

9. Once the report is saved the system shows following message and filter panel to run the saved report.

10. In most of the cases, the filter panel would show "Plant" option or "Supplier" option because our system is multi-tenant system and we do not want to accidently show any protected to data to all users.

11. Select both option and click Show Report.

12. System Shows following report output:

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13. If we need to change the report definition we can click on the Edit report option on the right side corner.
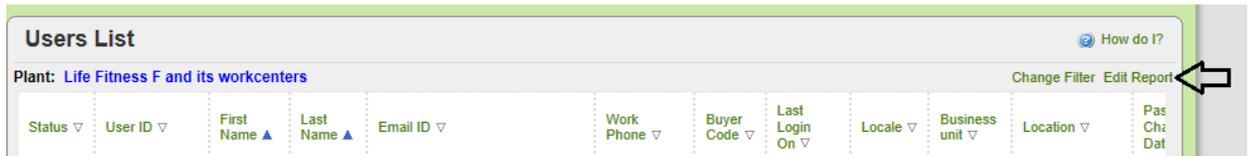
14. The report output can be exported and printed using Print and Export option.
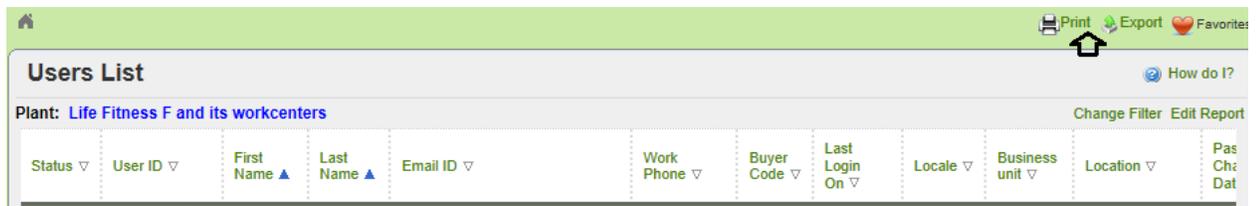
2.2   Creating Group – Detailed Report

Grouped reports are reports that have a header and details section. It is called Grouped report because the records are grouped under a header condition.

Assume for an example if we would like to see a report that shows Supplier Code, Supplier Name in the Header and lists all the Items supplied by this supplier then this is the format that we should use. Following steps illustrates the same.

1. From Create Custom Report selection, pick the Item to Suppliers option.

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2. This shows the next report definition step

3. Enter

   a. report name

   b. report description

   c. Select Visible only to me option

   d. Select Report output format to Group – Detailed

      i. Please note that once we select Group – Detailed option there is one more list box for Summary fields getting added to Report Fields section.

   e. Leave the filter section empty

4. Select fields for output.

   a. Please note the summary fields section.

   b. Select fields to be shown. Pick following IsDefaultSupplier, SupplierName, Supplier Item NO., Supplier Item Desc, Carrier, Lead Time, Transit Time, Card Allocation %, PO #, PO Line #, Blanket Qty, Business Name.

c. Also add "Summary field" called Supplier Name by clicking the field in the "Show Fields" and then click the right Arrow button.

d. Now we added the fields, and Group By Field for the report.

e. Select sort condition for the report Supplier Item no and leave the formula fields empty.

f. Save the report.

g. Once the save report is completed, the system takes to the next step where we can define any

Aggregate fields.
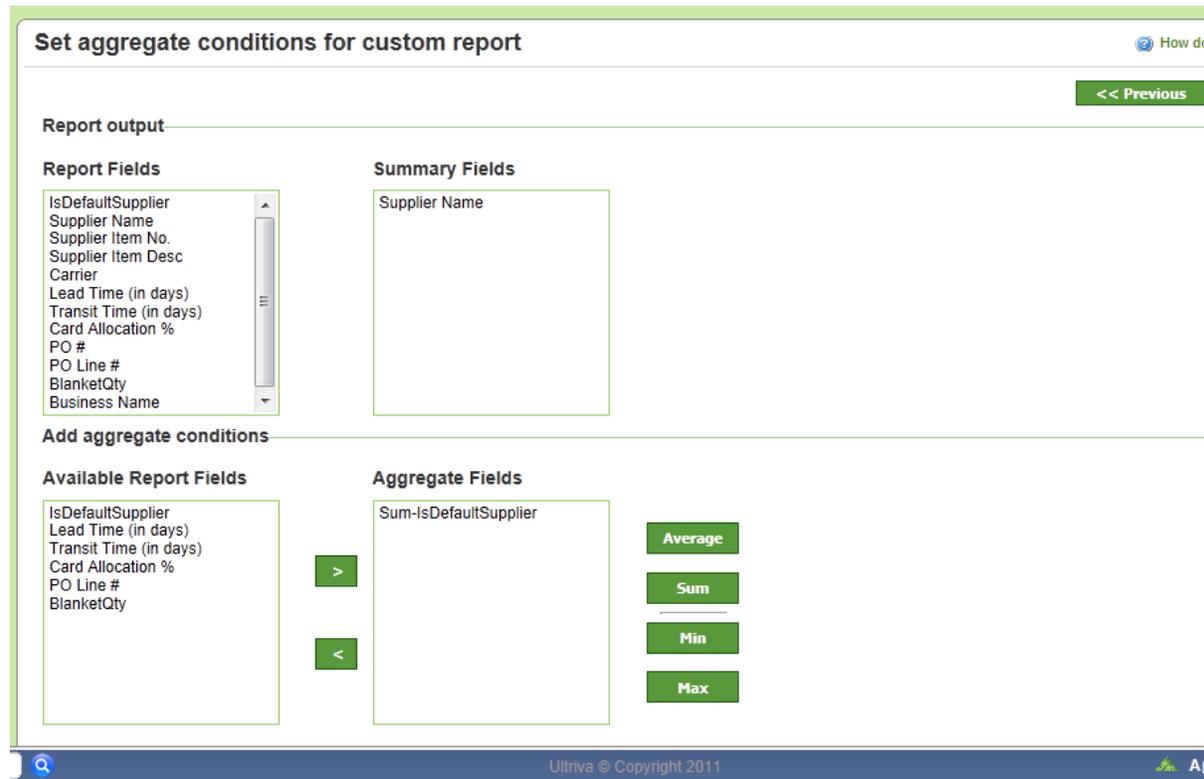
h. If we define any Aggregate fields then the same will show up at the bottom line of each group. For instance if we want to add "how many total items are default for this grouped supplier then we can pick following step":

   i.   Select IsDefaultSupplier and click right arrow button.
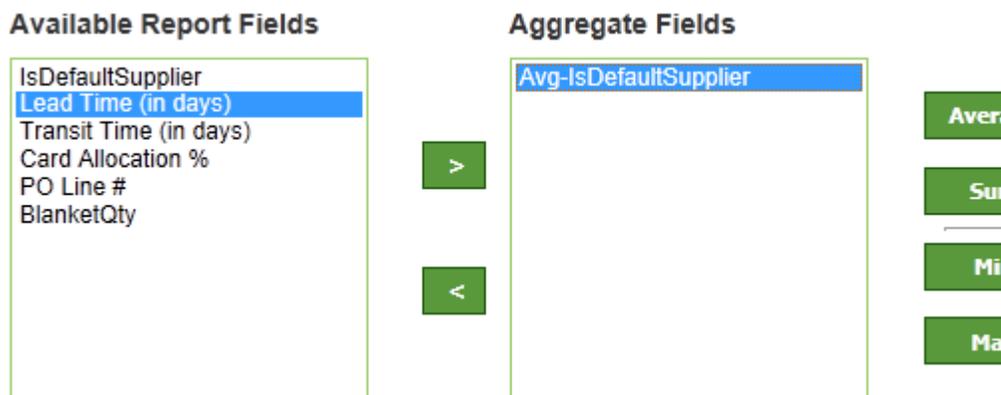
   ii. By default the system picks average aggregate option for the field. Now select that added field, and click on Sum button.

Aggregate Fields

Sum-IsDefaultSupplier

Average

Sum

Min

Max

Click Save to save the report.

Show Custom Report

Custom report Suppliers and Items successfully updated.

Name:	Suppliers and Items
Type:	Admin: Item To Suppliers (Group - Detailed)
Description:	Items Supplied By Suppliers

Plant: ○ This Plant   ○ Work Centers   ◉ Both
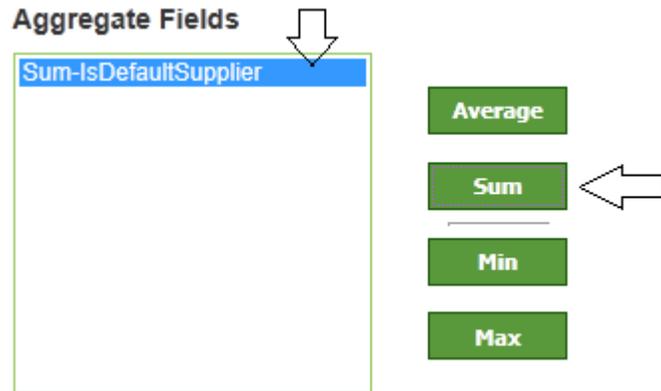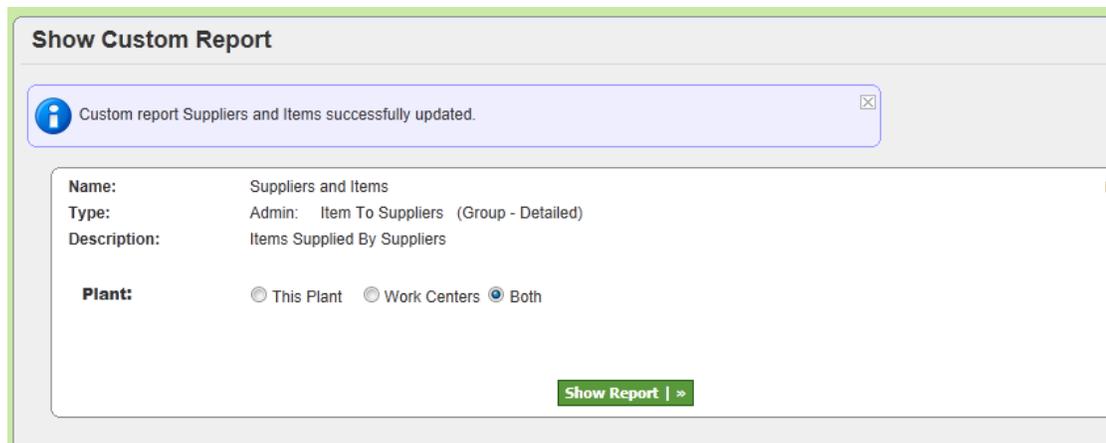
Show Report | »

Now you can click "Show report" to see the result.

The output looks something like this:

We have a header Supplier name and then details items section.

We also have bottom line section where by default Total Records count is shown and whatever aggregate conditions that we added also shown.

2.3   Creating Group – Summary Report

Group – Summary reports are reports which are similar to tabular format reports except that it has aggregated fields to the report. For example if we need to run report to see how many cards are there for each item and also we would like to add some aggregate counts to then we would use this report format.

Following steps illustrates the same.

1.   From Create Custom Report selection, pick Active Cards option.

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2. Enter

    a. Report Name

    b. Report description

    c. Select Visibile only to me

    d. Select Report output format to Group – Summary.

    e. Leave the Report Filter Fields empty

3. Select the report output fields.

    a. Please note that In the Group – Summary report only the Summary fields will be shown in the output along with the aggregate conditions that we are going to add.

    b. Add Item to Summary fields list.

4. Select Fields for the Report output

Available Fields
Card State
Cycle No
Card Qty
Ship Qty
Receive Qty
Last Action Time
Location Code
Create Time
Maintenance Date
PO #
PO Line #
Item

Show Fields
Card ID
Card State
Cycle No
Card Qty
Ship Qty
Receive Qty
Last Action Time
Location Code
Item

* Summary Fields
Item

5. Select Fields for Sort condition

Available Fields
Card State
Cycle No
Card Qty
Ship Qty
Receive Qty
Last Action Time
Location Code
Create Time
Maintenance Date
PO #
PO Line #
Item

Sort Fields
A-Item

6. Add Formula Fields

c. Leave formula fields empty.

d. In the next step please add some aggregate conditions. In this example we will be adding following conditions: Sum(CardQty), Sum(ShipQty), Sum(ReceiveQty), and Min(LastActionTime) as shown below.

Add aggregate conditions

Available Report Fields
Cycle No
Card Qty
Ship Qty
Receive Qty
Last Action Time

Aggregate Fields
Sum-Card Qty
Sum-Ship Qty
Sum-Receive Qty
Max-Last Action Time

Average

Sum

Min

Max

e. Then Save the report.

f. Now the save message shows up and filter also shown to run the report.

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g.   Click Show report

h.   The output shows up something like this:

2.4   Adding Formula Fields

Formula fields are user defined custom fields. The formula fields are programming expressions and derive values from other pre-defined fields. For instance if we would like to show the full name of the user in a single column then we may have a formula field called Full Name and have an expression FirstName + ' ' + LastName as the formula.

Ultriva supports various expression functions as explained in http://help.ultrivalms.com/CheatSheets/UltrivaExpressionEvalCheatSheet.pdf . Care must be taken while constructing the formula fields otherwise the report might fail.

Following steps demonstrates how to define a formula field.

We will use the existing report definition Users List.

Ultriva Custom Report Builder

Go to My reports. Select Users List report and click Edit button.

My Reports
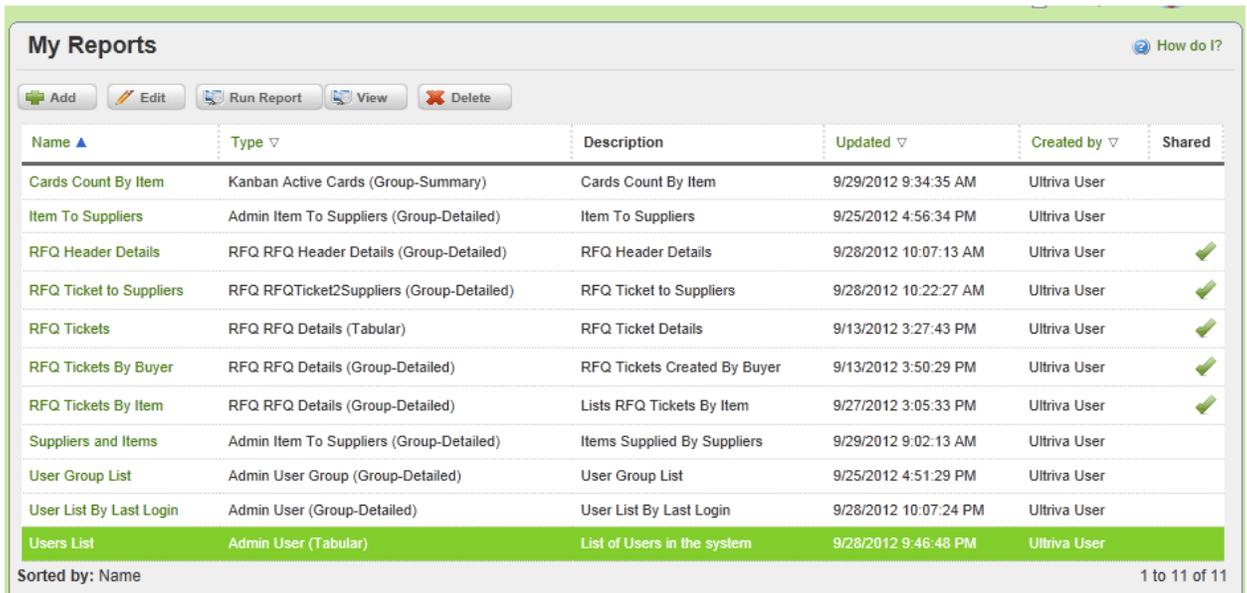
Name ▲	Type ▽	Description	Updated ▽	Created by ▽	Shared
Cards Count By Item	Kanban Active Cards (Group-Summary)	Cards Count By Item	9/29/2012 9:34:35 AM	Ultriva User	
Item To Suppliers	Admin Item To Suppliers (Group-Detailed)	Item To Suppliers	9/25/2012 4:56:34 PM	Ultriva User	
RFQ Header Details	RFQ RFQ Header Details (Group-Detailed)	RFQ Header Details	9/28/2012 10:07:13 AM	Ultriva User	✔
RFQ Ticket to Suppliers	RFQ RFQTicket2Suppliers (Group-Detailed)	RFQ Ticket to Suppliers	9/28/2012 10:22:27 AM	Ultriva User	✔
RFQ Tickets	RFQ RFQ Details (Tabular)	RFQ Ticket Details	9/13/2012 3:27:43 PM	Ultriva User	✔
RFQ Tickets By Buyer	RFQ RFQ Details (Group-Detailed)	RFQ Tickets Created By Buyer	9/13/2012 3:50:29 PM	Ultriva User	✔
RFQ Tickets By Item	RFQ RFQ Details (Group-Detailed)	Lists RFQ Tickets By Item	9/27/2012 3:05:33 PM	Ultriva User	✔
Suppliers and Items	Admin Item To Suppliers (Group-Detailed)	Items Supplied By Suppliers	9/29/2012 9:02:13 AM	Ultriva User	
User Group List	Admin User Group (Group-Detailed)	User Group List	9/25/2012 4:51:29 PM	Ultriva User	
User List By Last Login	Admin User (Group-Detailed)	User List By Last Login	9/28/2012 10:07:24 PM	Ultriva User	
Users List	Admin User (Tabular)	List of Users in the system	9/28/2012 9:46:48 PM	Ultriva User	

Sorted by: Name 1 to 11 of 11

1. In report builder, click Add Formula in the Add Formula Fields section.

   a. Add Formula field popup shown.
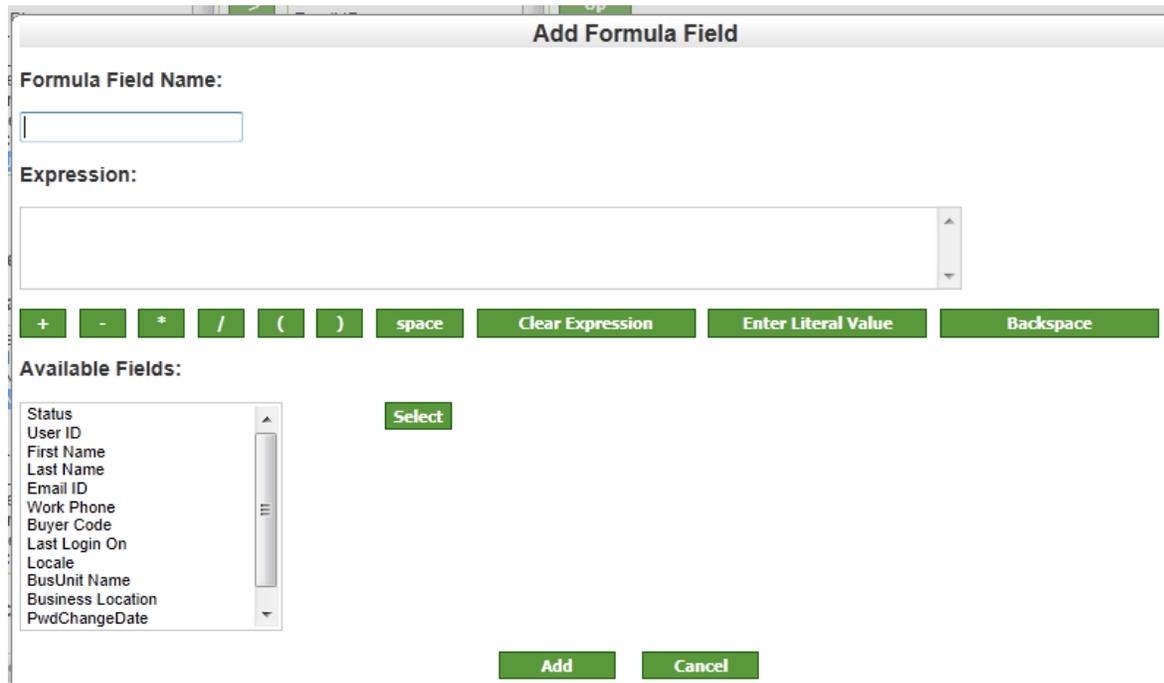
Add Formula Field

Formula Field Name:

Expression:

| + | - | * | / | (|) | space | Clear Expression | Enter Literal Value | Backspace |

Available Fields:

Status
User ID
First Name
Last Name
Email ID
Work Phone
Buyer Code
Last Login On
Locale
BusUnit Name
Business Location
PwdChangeDate

Select

Add   Cancel

2. Enter a name for your formula as it will appear on the report. The label must be unique.

3. You must Select the field in the available fields and click select.

   a. In this example we will pick First Name and click Select.

b. And in the Expression the internal field name of the First Name field is shown.

Expression:

PRS_FirstName

c. Now we will type + ' ' + as shown below.

Expression:

PRS_FirstName + ' ' +

d. Then select Last Name and click select button.

Expression:

PRS_FirstName + ' ' + PRS_LastName

e. Click Add button.

6. **Add Formula Fields**

Field Name	Formula	Edit	Delete
Full Name	PRS_FirstName + ' ' + PRS_LastName	🖉	✖

f. The newly added field is also added automatically to output fields.

4. **Select Fields for the Report output**

Available Fields	Show Fields
First Name	First Name
Last Name	Last Name
Email ID	Email ID
Work Phone	Work Phone
Buyer Code	Buyer Code
Last Login On	Last Login On
Locale	Locale
BusUnit Name	BusUnit Name
Business Location	Business Location
PwdChangeDate	PwdChangeDate
AccountName	AccountName
Full Name	Full Name

g. Then click save.

h. Run the report and it shows the following output.

Users List

How do

Plant: Life Fitness F and its workcenters

Change Filter Edit Re

Last Name ▲	Email ID ▽	Work Phone ▽	Buyer Code ▽	Last Login On ▽	Locale ▽	Business unit ▽	Location ▽	Password Change Date ▽	Primary User Group ▽	Full Name ▽
Cohen	adam.cohen@lifefitness.com	18472883870		05/18/2012	Not Set	Life Fitness Franklin Park	Franklin Park	01/28/2011	$plant_admin	Adam Cohen
Carranza	agustin.carranza@lifefitness.com	18472882010		09/15/2011	en-us	Life Fitness Franklin Park	Franklin Park	09/15/2011	$receiving dock user	Agustin Carranza

3   Release schedule

We will be releasing the Custom Report Builder in Ultriva 7.5 release (please note that Ultriva version number will be increased to 7.5 from 7.0) which is scheduled to be released when Ultriva RFQ Application goes live at ATK.

4   Future Enhancements

We will be incorporating following enhancements in the phase 2

1. Adding Charts to reports

2. Creating Cross Tab Report

3. Customizing the Pre-defined reports which are already available in the system