

User Guide

Ultriva Custom Reports

Version 1.0

Table of Contents

1	Ult	riva Custom Reports	. 3
	1.1	Custom Reports	. 3
2	Cre	ating Custom Reports	. 5
	2.1	Creating Tabular format report	. 5
	2.2	Creating Group – Detailed Report	. 8
	2.3	Creating Group – Summary Report	13
	2.4	Adding Formula Fields	16
3	Rel	ease schedule	20
4	Fut	ure Enhancements	21

Revisions

Date	ons Author
9/28/2012	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".

Reports	@ H	How do I?
Buyer Reports		
Supplier Reports		
OEE Reports		
Admin Reports		
Custom Reports		
Create Custom Report Create Custom Report	My Reports My Reports	
Shared Reports Shared 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.

My Reports				6	How do
📫 Add 🛛 🥖 Edit	💭 Run Report 🛛 💭 View 🛛 🗶 Delete				
Name 🔺	Туре ⊽	Description	Updated ⊽	Created by ⊽	Share
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	4
RFQ Tickets By Item	RFQ RFQ Details (Group-Detailed)	Lists RFQ Tickets By Item	9/27/2012 3:05:33 PM	Ultriva User	4
User Group List	Admin User Group (Group-Detailed)	User Group List	9/25/2012 4:51:29 PM	Ultriva User	
Users List	Admin User (Tabular)	List of Users in the system	9/28/2012 9:46:48 PM	Ultriva User	
orted by: Name					1 to 8 (

- 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.

				_	
Shared Reports	5				(2) How do
🚔 Add 🛛 💭 Run Repo	ort 🔯 View				
Name 🛦	Type ⊽ View	Description	Updated ⊽	Created by ⊽	My Report
RFQ Header Details	RFQ RFQ Header Details (Group-Detailed)	RFQ Header Details	9/28/2012 10:07:13 AM	Ultriva User	4
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	•
Sorted by: Name					1 to 5

- 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:

Create Custom F	Report		(2) How do l
o create a custom report s	elect report type and title.		
Report Type			
Admin	▲		
	Title	Description	
	User	List of users	
	Item To Suppliers	List of items to suppliers	
	User Group	User's group	
	Suppliers User	Suppliers user list	
Kanban	▲		
	Title	Description	
	Active Cards	Current kanban data	
	Cross Tab History	Kanban cycle historical data	
	History	Kanban action history	
	Action Audit	Historical kanban action audit	
RFQ	▲		
	Title	Description	
	RFQ Header Details	RFQ Header and Details	
	RFQ Details	RFQ Ticket Details	
	RFQTicket2Suppliers	RFQ Ticket to Suppliers	

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"

Create custom report for Admin User					
1. Report Information					
* Name:	Users List				
* Description:	Users List				
Visible only to me	◎ Visible to All				
2. Report Output Format					

- 4. Now select any filter condition if needed.
- 5. Select the output fields that need to be shown in the output.

4. Select Fields for the Report output								
Available Fields		Show Fields						
User ID First Name Last Name Email ID Work Phone Buyer Code Last Login On Locale BusUnit Name Business Location PwdChangeDate AccountName		 Status User ID First Name Last Name Email ID Work Phone Buyer Code Last Login On Locale BusUnit Name Business Location PwdChangeDate 						

- 6. Select sort condition.
 - a. If the field has to be sorted by Descending order then please click the "Desc" button.

Available Fields			Sort Fields		
Status User ID First Name Last Name	^	>	A-First Name A-Last Name		Up
Email ID Work Phone Buyer Code Last Login On Locale	E	<			Down Asc
BusUnit Name Business Location PwdChangeDate	-				Desc

- 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.

now Custom Report								
Custom report Us	ers List successfully created.							
Name:	Users List	Edit Report						
Туре:	Admin: User (Tabular)							
Description:	List of Users in the system							
Plant:	◎ This Plant ◎ Work Centers ● Both							
	Show 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:

00010											
lant: Life	Fitness F and	l its workcent	ters							Change Filter E	dit Report
Status ⊽	User ID ⊽	First Name ▲	Last Name ▲	Email ID ⊽	Work Phone ⊽	Buyer Code ⊽	Last Login On ⊽	Locale ⊽	Business unit ⊽	Location ⊽	Pas Cha Dat
Ĺ	COHENA	Adam	Cohen	adam.cohen@lifefitness.com	18472883870		05/18/2012	Not Set	Life Fitness Franklin Park	Franklin Park	01/2
	carrana	Agustin	Carranza	agustin.carranza@lifefitness.com	18472882010		09/15/2011	en-us	Life Fitness Franklin Park	Franklin Park	09/1
¢	villaa	Agustin	Villa	Augustin.Villa@lifefitness.com	847-288- 3857		06/06/2012	Not Set	Life Fitness Franklin Park	Franklin Park	09/1
¢	owensa	AI	Owens	al.owens@lifefitness.com	18472883884		06/06/2012	en-us	Life Fitness Franklin Park	Franklin Park	09/2
¢	kettera	Andrea	Ketter	andrea.ketter@lifefitness.com	18472883692		06/28/2011	en-us	Life Fitness Franklin Park	Franklin Park	06/2
1	andym	Andy	Murray	andym@ultriva.com	408-248- 9803		07/06/2012	Not Set	Life Fitness Franklin	Franklin Park	07/C

13. If we need to change the report definition we can click on the Edit report option on the right side corner.

Users List						How do I?				
Plant: Life Fitness F and its workcenters Change Filter Edit Report					Edit Report					
Status ⊽ User ID ⊽	First Name ▲	Last Name ▲	Email ID ⊽	Work Phone ⊽	Buyer Code ⊽	Last Login On ⊽	Locale ⊽	Business unit ⊽	Location ⊽	Pas Cha Dat

14. The report output can be exported and printed using Print and Export option.

	A Export Sector						Pavorites					
Í	Users List											
	Plant: Life Fitness F and its workcenters Change Filter Edit Report						dit Report					
	Status ⊽	User ID ⊽	First Name ▲	Last Name ▲	Email ID ⊽	Work Phone ⊽	Buyer Code ⊽	Last Login On ∇	Locale ⊽	Business unit ⊽	Location ⊽	Pas Ch≀ Dat

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.

To create a custom report select report type and title.					
Report Type					
Admin					
	Title	Description			
	User	List of users			
	Item To Suppliers	List of items to suppliers			
	User Group	User's group			
	Suppliers User	Suppliers user list			

2. This shows the next report definition step

Name.	Suppliers and Items		
Description:	Items Supplied By Suppliers	~	
Visible only to me	Visible to All		
Report Output Format			
Add Fields for Report Fi	Iter		
lease select field, select an ope	rator, enter value and click Add to add the filter condit	tion. You may add any number of filter conditions.	
	alast Operator - Enter Value	Add	
Filter By 💌 S			

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.

vailable Fields	Show Fields	* Summary Fields
/ait at Runline? /ait at Ship Hub? em escription roduct Line ommodity Code lin Order Cards OM usiness Name lanke(Dty O # O Line #	 IsDefaultSupplier Supplier Name Supplier Item No. Supplier Item Desc Carrier Lead Time (in days) Transit Time (in days) Card Allocation % PO # PO Line # BlanketQty Business Name 	Up > Down <

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

Show Fields			* Summary Fields	
IsDefaultSupplier	<u></u>		Supplier Name	
Supplier Name Supplier Item No. Supplier Item Desc Carrier Lead Time (in days) Transit Time (in days) Card Allocation %	Up	>		
PO # PO Line # BlanketQty Business Name	Down	<		

- 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.

5 Select Fields for Sort condition				
Available Fields IsDefaultSupplier Supplier Name Supplier Name Supplier Item Desc Carrier Lead Time (in days) Card Allocation % Item Description Product Line Commodity Code	Sort Fields	Up Down Asc Desc		
6. Add Formula Fields				
Field Name		Formula	Edit	Delete

- 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.

C Previous Report output Report Fields Summary Fields Supplier Item Name Supplier Item Name BanketOty Supplier Item Songerstandow Ad aggregate conditions Aggregate Fields Marcal Supplier Sum-IsDefaultSupplier Lead Time (in days) Car Allocation % Card Allocation % Sum-IsDefaultSupplier Lead Time (in days) Sum-IsDefaultSupplier Card Allocation % Sum-IsDefaultSupplier Lead Time (in days) Sum-IsDefaultSupplier Card Allocation % Sum-IsDefaultSupplier Lead Time (in days) Card Allocation % Card Allocation % Sum-IsDefaultSupplier Lead Time (in days) Card Allocation % Card Allocation % Sum BlanketOty Sum Sum Sum Sum Max	Set aggregate conditions for	custom report		😰 How d
Report output Report Fields Summary Fields Supplier Name Supplier Name Supplier Item Nos. Supplier Name Supplier Item Nos. E Carrier E Lead Time (in days) E Transit Time (in days) E Carrier E PO 4 E Business Name E Add aggregate conditions Aggregate Fields Add aggregate conditions Sum-isDefaultSupplier Lead Time (in days) E Transit Time (in days) E E E E Sum E E <th></th> <th></th> <th></th> <th><< Previous</th>				<< Previous
Report Fields Summary Fields IsDefaultSupplier Supplier Name Supplier Item No. Supplier Name Supplier Item No. Supplier Name Supplier Item Desc E Carrier E Lead Time (in days) E Carrier E PO # E BiankerOtly E Business Name Aggregate Conditions Add aggregate conditions Aggregate Fields Add adgregate conditions Sum-IsDefaultSupplier Lead Time (in days) Carrier Transit Time (in days) Carrier Carrier Sum-IsDefaultSupplier Lead Time (in days) Carrier Carrier Sum-IsDefaultSupplier Lead Time (in days) Carrier Carrier Sum-IsDefaultSupplier Lead Time (in days) Carrier Carrier Sum BlanketOly Sum BlanketOly Max	Report output			
IsDefaultSupplier Supplier Name Supplier them No. Supplier them Desc Carrier Lead Time (in days) Transit Time (in days) Card Allocation % PO Ine # BlanketOty Lead Time (in days) Transit Time (in days) Card Allocation % PO Line # BlanketOty Aggregate Fields Sum-IsDefaultSupplier Lead Time (in days) Card Allocation % PO Line # BlanketOty Sum-IsDefaultSupplier Sum-IsDefaultSupplier IsoefaultSupplier Lead Time (in days) Card Allocation % PO Line # BlanketOty Sum-IsDefaultSupplier Sum IsoefaultSupplier Lead Time (in days) Card Allocation % PO Line # BlanketOty Max	Report Fields	Summary Fields		
IsDefaultSupplier Sum-IsDefaultSupplier Lead Time (in days) Sum-IsDefaultSupplier Card Allocation % Sum PO Line # Sum BlanketQty Image: Sum of the state of the	IsDefaultSupplier Supplier Name Supplier Item No. Supplier Item Desc Carrier Lead Time (in days) Transit Time (in days) Card Allocation % PO # PO Line # BlanketOty Business Name Add aggregate conditions Available Report Fields	Supplier Name		
🝳 Ultriva © Copyright 2011 🎄 🗛	IsDefaultSupplier Lead Time (in days) Transit Time (in days) Card Allocation % PO Line # BlanketQty	Sum-IsDefaultSupplier	Average Sum Min Max	
	<u>Q</u>	Ultriva ©	Copyright 2011	<i></i> A

- 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.

Available Report Fields IsDefaultSupplier Avg-IsDefaultSupplier Lead Time (in days) Avg-IsDefaultSupplier Transit Time (in days) > Card Allocation % > PO Line # Supplier BlanketQty Image: Contract of the second sec

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

Aggregate Fields	Q	
Sum-IsDefaultSupplier	×	
		Average
		Min
		Max

Click Save to save the report.

Custom report Su	ppliers and Items successfully updated.
Name:	Suppliers and Items
Туре:	Admin: Item To Suppliers (Group - Detailed)
Description:	Items Supplied By Suppliers
Plant:	◎ This Plant ◎ Work Centers Both

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

The output looks something like this:

AEC-MOTIONSTAR, INC.	Group Header						
		0K58-01001-0001	0K58- 01001- 0001	EXPEDITORS	80.00	25.00	
	1	0K58-01002-0000	0K58- 01002- 0000	EXPEDITORS	80.00	25.00	
	1	0K58-01067-0001	0K58- 01067- 0001	EXPEDITORS	80.00	25.00	
Det		0K58-01068-0000	0K58- 01068- 0000	EXPEDITORS	80.00	25.00	
ai s	4	0K65-01195-0000	0K65- 01195- 0000	EXPEDITORS	80.00	25.00	
	4	0K65-01195-0001	0K65- 01195- 0001	EXPEDITORS	80.00	25.00	
	Ľ	0K65-01199-0000	0K65- 01199- 0000	EXPEDITORS	80.00	25.00	
		0K65-01199-0001	0K65- 01199- 0001	EXPEDITORS	80.00	25.00	
Total 8	8						
1							

Group Bottom line

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.

1. Report Information			
* Name:	Cards Count By Item		
* Description:	Cards Count By Item	A T	
Visible only to me	Visible to All		
2. Report Output Format Group – Summary			
3. Add Fields for Report Filter-			
Please select field, select an operator	, enter value and click Add to add the filter co	notition. You may add any number of filter conditio	ns.
Filter By Select	Dperator Enter Value	🚔 Add	
Field Name	Operator	Filter Value	Action

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.

vailable Fields		Show Fields		* Summary Fields
Card State Cycle No Card Qty Ship Qty Receive Qty	* >	Card ID Card State Cycle No Card Qty Ship Qty	Up >	Item
ast Action Time ocation Code reate Time laintenance Date	H <	Receive Oty Last Action Time Location Code Item	Down <	
PO # PO Line #				
item Select Fields for St	▼	n		
item . Select Fields for So .vailable Fields	▼ ort conditio	n		
Item Select Fields for So Available Fields Card State Cycle No Card Qty Ship Qty Descrim Oty	• ort conditio	n Sort Fields A-Item	Up	
Item Select Fields for So Available Fields Card State Cycle No Card Qty Ship Qty Receive Qty Last Action Time Location Code Create Time Maintenance Date	The second se	nSort Fields A-Item	Up Down Asc	

- 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-



- e. Then Save the report.
- f. Now the save message shows up and filter also shown to run the report.

Name:	Cards Count By Item	Edit Repor
Туре:	Kanban: Active Cards (Group – Summary)	
Description:	Cards Count By Item	
Plant:	This Plant Work Centers O Both	
	Show Report »	
·		

- g. Click Show report
- h. The output shows up something like this:

Cards Count By I	tem				How do
Plant: Life Fitness F and it	s workcenters				Change Filter Edit Re
Item	Total	Card Qty	Ship Qty	Receive Qty	Last Action Time
0017-00003-0685	12	11,776	0	0	2012-06-01 07:24:
0017-00003-0691	12	600	0	0	2012-08-22 11:27:
0017-00003-0696	37	1,110	SUM 60	60	2012-08-20 12:18:
0017-00003-0704	9	675	0	0	2012-07-02 15:11:
0017-00003-0781	13	325	0	0	2012-06-06 10:24:
0017-00003-0889	12	600	0	0	2012-08-20 18:28:
0017-00003-0890	28	840	150	150	2012-08-20 18:43:
0017-00003-0918	9	450	0	0	2012-08-20 18:43:
0017-00003-0951	3	100	0	0	2012-02-13 09:41:
0017-00003-0974	44	1,230	30	30	2012-08-20 18:43:
0017-00003-0980	30	750	50	50	2012-07-12 15:48:
0017-00003-0985	5	200	0	0	2012-06-05 12:17:
0017-00003-0996	26	780	60	60	2012-07-12 15:28:
0017-00003-1014	17	680	80	80	2012-08-20 12:18:
0017-00003-1052	4	120	0	0	2012-05-18 11:08:
0017-00003-1054	18	540	0	0	2012-06-06 10:17:
0017-00006-0274	3	1,800	0	0	2012-06-02 04:52:
0017-00006-0276	10	1,600	320	0	2012-09-28 16:28:

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.

My Reports					🔞 How do I
🚔 Add 🛛 🥖 Edit	😴 Run Report 🛛 🐺 View 🛛 🗱 Delete				
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	4
RFQ Ticket to Suppliers	RFQ RFQTicket2Suppliers (Group-Detailed)	RFQ Ticket to Suppliers	9/28/2012 10:22:27 AM	Ultriva User	4
RFQ Tickets	RFQ RFQ Details (Tabular)	RFQ Ticket Details	9/13/2012 3:27:43 PM	Ultriva User	4
RFQ Tickets By Buyer	RFQ RFQ Details (Group-Detailed)	RFQ Tickets Created By Buyer	9/13/2012 3:50:29 PM	Ultriva User	4
RFQ Tickets By Item	RFQ RFQ Details (Group-Detailed)	Lists RFQ Tickets By Item	9/27/2012 3:05:33 PM	Ultriva User	4
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	

- 1. In report builder, click Add Formula in the Add Formula Fields section.
 - a. Add Formula field popup shown.

P [*]		OP .		
		Add Formula F	ield	
Formula Field Name:]			
Expression:				
6				*
+ - * /	() 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 PurdChangeDate	Select			
		Add Ca	ncel	

- 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			
🚔 Add			
Field Name	Formula	Edit	Delete
Full Name	PRS_FirstName + ' ' + PRS_LastName	1	*

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 Last Name Email ID Work Phone Buyer Code Last Login On Locale BusUnit Name Business Location PwdChangeDate AccountName Full Name	> V	First Name Last Name Email ID Work Phone Buyer Code Last Login On Locale BusUnit Name Business Location PwdChangeDate AccountName Full Name	4 III	Up Down

- g. Then click save.
- h. Run the report and it shows the following output.

Users	List								(How do
Plant: Life	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	Sreceiving 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