

S130 Data Retrieval and Analysis

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May, 2018

Class Syllabus

- Day 1, Monday, May 21, 2018, 09 AM- 11 AM PDT: Generic Inquiries
- Day 2, Tuesday, May 22, 2018, 09 AM -11 AM PDT: The Report Designer
- Day 3, Wednesday, May 23, 2018, 09 AM -11 AM PDT: The Report Designer (cont.)
- Day 4, Thursday, May 24, 2018, 09 AM -11 AM PDT:
 - Filters
 - Dashboards
 - Pivot Tables
 - Access Rights to Inquires, Reports, Dashboards, and Pivot Tables

Advanced preparations

- Acumatica ERP 2017 R2, version 2017.208.0034
- Report Designer application
- SalesDemo data preinstalled
- Downloaded training guide and files for training

Session rules

- All Attendees will be in Mute mode
- Polling questions will be asked at random moments without advance notice
- If you have a question, write your message in a chat and click Raise Hand
- Acumatica certification should be done through Acumatica University

Day 1: Generic Inquires

Overview of generic inquiries

Goals for the day

- Create and work with Generic Inquires
- Get the best use of created Generic Inquires
- Ways to troubleshoot Generic Inquires



Objectives

In this lesson you will learn how to...

- Recognize Data Access Classes
- Understand joining tables
- Build custom Generic Inquires
- Create Odata feeds

Agenda

- Data Access Classes overview
- Generic Inquiry Basics
- Creating Generic Inquires
- Configuring Generic Inquiry as an Entry Point
- Exposing Generic Inquires to Odata
- Using Generic Inquires in Export Scenarios

What is a generic inquiry?

A tabular representation of data in the system used to display data belonging to same or different screens in one table

Products Wholesale ▾ Invoiced Items ★

CUSTOMIZATION ▾ PIVOT TABLES ▾ TOOLS ▾

⌂ ↶ ⌂ ⌂

ALL RECORDS KEY CUSTOMERS 12 MONTHS

Drag column header here to configure filter

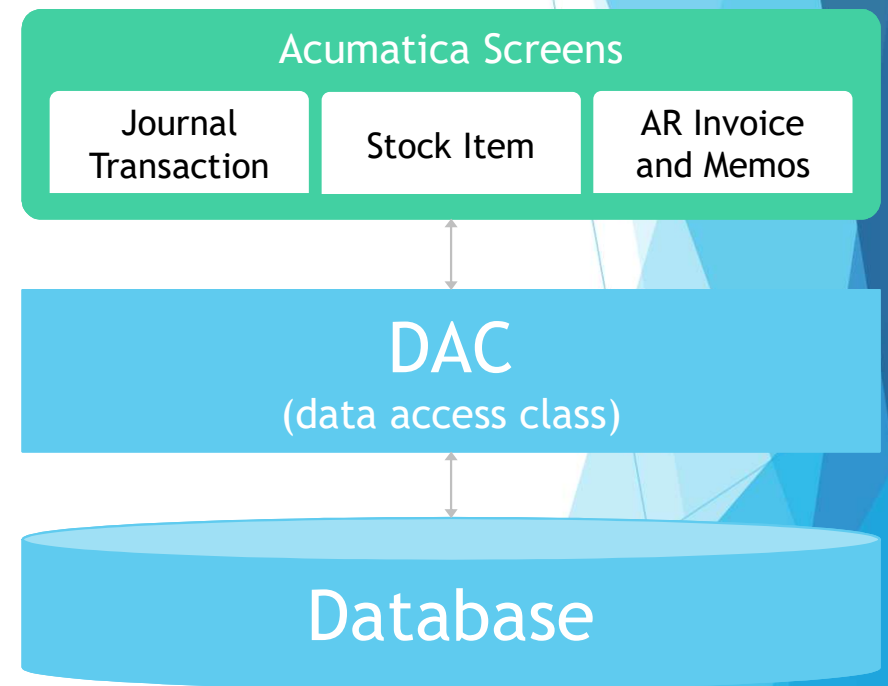
		Account ID	Account Name	Customer Class ID	Address Line 1	City	State	Count	Financial Period	Invoice Date	Reference Nbr.	Type	Inventory ID	Description
>	📄	ABARTENDE	USA Bartendin...	KEY	203 Lower Notch Rd	Little Falls	NJ	US	201805	5/10/2018	AR005724	Invoice	ITEM	Testing item Cl
	📄	ABARTENDE	USA Bartendin...	KEY	203 Lower Notch Rd	Little Falls	NJ	US	201805	5/10/2018	AR005726	Invoice	ITEM2	
	📄	ABARTENDE	USA Bartendin...	KEY	203 Lower Notch Rd	Little Falls	NJ	US	201805	5/10/2018	AR005728	Invoice	ITEM3	
	📄	ABARTENDE	USA Bartendin...	KEY	203 Lower Notch Rd	Little Falls	NJ	US	201805	5/3/2018	AR005723	Invoice	ACCOMOD...	Hotels and Lod
	📄	ABARTENDE	USA Bartendin...	KEY	203 Lower Notch Rd	Little Falls	NJ	US	201805	5/2/2018	AR005721	Invoice	SOFTLIC01	Software licen.
	📄	ABARTENDE	USA Bartendin...	KEY	203 Lower Notch Rd	Little Falls	NJ	US	201805	5/2/2018	AR005721	Invoice	SOFTLIC02	Software licen.
	📄	ABARTENDE	USA Bartendin...	KEY	203 Lower Notch Rd	Little Falls	NJ	US	201805	5/2/2018	AR005721	Invoice	SOFTMAINT	Software maint
	📄	ABARTENDE	USA Bartendin...	KEY	203 Lower Notch Rd	Little Falls	NJ	US	201805	5/2/2018	AR005721	Invoice	SOFTMAINT	Software maint
	📄	ABARTENDE	USA Bartendin...	KEY	203 Lower Notch Rd	Little Falls	NJ	US	201805	5/1/2018	AR005719	Credit Memo		

How does it work?

- Data in the system stored in Data Base
- Data Access Classes (DACs) to retrieve data from the database
- Based on the same concepts of how SQL queries work
 - Relationships
 - Joins

Data Access Classes

- DAC: Similar to database, but not identical
- Other terms
 - BQL
 - Schema

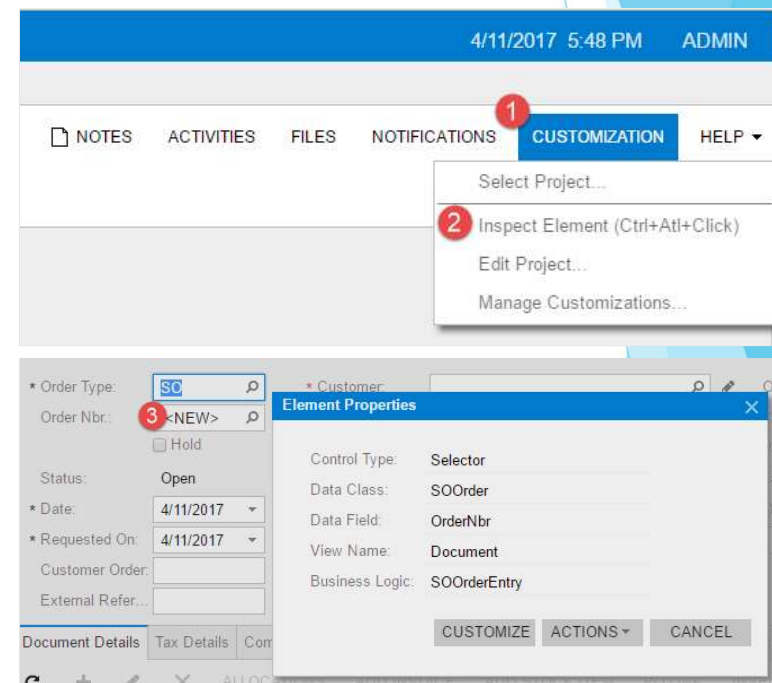


Generic inquires requirements

- Find in which Data Access Class (DAC) data is stored
- Find the key fields for these Data Access Classes to be joined

Finding Field Names

- Customizer role required
- Click “Inspect Element”
- Click field you want to learn about
 - Data Class (table)
 - Data Field (field name)
- Natural key (CD) versus surrogate/machine key (ID)



Exercise 1: It's as simple as that

- Scenario: Customer wants to know which Customer buys which Products the most
- Create a new GI called Invoiced items per Customer
- Use Inspect element to find the DACs that store the data needed
- Find the key fields to join the tables

Generic Inquiry - Tables

Revision Two HQ ▾ Generic Inquiry ★

📁 ↺ + 🗑️ 📋 ▾ ⏪ ⏩ ⏴ ⏵ VIEW INQUIRY

* Inquiry Title: 🔍

Site Map Title:

Site Map Location: 🔍

Screen ID:

☐ Expose via OData

Arrange Parameters in: columns

Select top: records

Records per Page:

☐ Number Pages

TABLES RELATIONS PARAMETERS CONDITIONS GROUPING ⚠️ SORT ORDER ⚠️ RESULTS GRID

🔄 + ✎ ✕ ⏪ ⏩

📄	📄	* Table Name	* Alias
➤	📄	PX.Objects.AR.ARInvoice	ARInvoice
	📄	PX.Objects.AR.ARTran	ARTran

Generic Inquiry - Relations

Revision Two HQ ▾ **Generic Inquiry** ★

VIEW INQUIRY

* Inquiry Title: InvoicedItemsPerCustomer ⓘ
 Site Map Title:
 Site Map Location: ⓘ
 Screen ID:

Arrange Parameters in: 3 columns
 Select top: 0 records
 Records per Page: 0
☐ Number Pages

☐ Expose via OData

TABLES **RELATIONS** PARAMETERS CONDITIONS GROUPING ⚠ SORT ORDER ⚠ RESULTS GRID ENTRY POINT NAVIGATION

Table Relations

C + ✎ X ↑ ↓ ⇅ ☒

Active	Parent Table	Join Type	Child Table
<input checked="" type="checkbox"/>	ARInvoice	Inner	ARTran

Data Field Links For Active Relation

C + X ↑ ↓ ⇅ ☒

Brackets	Parent Field	Condition	Child Field
<input checked="" type="checkbox"/>	docType	Equals	tranType
<input type="checkbox"/>	refNbr	Equals	refNbr

Generic Inquiry - results grid

Revision Two HQ ▾ Generic Inquiry ★

📄 ↶ + 🗑️ 📋 ▾ ⏪ ⏩ > >| VIEW INQUIRY

* Inquiry Title: Arrange Parameters in: columns
Site Map Title: Select top: records
Site Map Location: Records per Page:
Screen ID: ☐ Number Pages
☐ Expose via OData

TABLES RELATIONS PARAMETERS CONDITIONS GROUPING SORT ORDER **! RESULTS GRID** ENTER

C + X ↑ ↓ ⇄ ☒						
📄	📄	Active	Object	Data Field	Schema Field	Width (px)
📄	📄	☑	ARInvoice	DocType		
📄	📄	☑	ARInvoice	RefNbr		
📄	📄	☑	ARTran	InventoryID	!	
📄	📄	☑	ARTran	TranDesc		
📄	📄	☑	ARInvoice	CustomerID	!	
> 📄	📄	☑	ARInvoice	CuryLineTotal		

Poll question1










What does DAC stand for in Acumatica ERP?

Exercise 2: Build your GI gradually

- Show documents of type Invoice only
- Add the GI to a Site Map location
- Add sorting order to the GI
- Group records

Generic Inquiry - Conditions

Revision Two HQ ▾ Generic Inquiry ★



VIEW INQUIRY

* Inquiry Title:

InvoicedItemsPerCustomer 🔍

Site Map Title:

Site Map Location: 🔍

Screen ID:

☐ Expose via OData

Arrange Parameters in:

3

 columns

Select top:

0

 records

Records per Page:

0

☐ Number Pages

TABLES

RELATIONS

PARAMETERS









CONDITIONS







GROUPING

⚠ SORT ORDER

⚠ RESULTS GRID

ENTRY PO



  	Active	Brackets	Data Field	Condition	From Schema	Value 1
  	<input checked="" type="checkbox"/>		ARInvoice.DocType	Equals	<input checked="" type="checkbox"/>	Invoice

 **Acumatica**
THE CLOUD ERP

Generic Inquiry - location

Revision Two HQ ▾ Generic Inquiry ★

📁 ↺ + 🗑️ 📋 ▾ ⏪ ⏩ ⏴ ⏵ VIEW INQUIRY

* Inquiry Title: InvoicedItemsPerCustomer 🔍

Site Map Title: Customer Invoiced Items

Site Map Location: Analysis 🔍

Screen ID: GI000081

☐ Expose via OData

Arrange Parameters in: 3 columns

Select top: 0 records

Records per Page: 0

☐ Number Pages

TABLES RELATIONS PARAMETERS CONDITIONS GROUPING ⚠️ SORT ORDER ⚠️ RESULTS GRID ENT

🔄 + ✎ ✕ ⏪ ⏩ ⏴ ⏵

* Table Name	* Alias
PX.Objects.AR.ARInvoice	ARInvoice
PX.Objects.AR.ARTran	ARTran

Generic Inquiry - sort order

Revision Two HQ ▾ Generic Inquiry ★





📁 ↺ + 🗑️ 📄 ▾ ⏪ ⏩ ⏴ ⏵ VIEW INQUIRY

* Inquiry Title: Invoiced items per Customer 🔍
Site Map Title: Invoiced items per Customer
Site Map Location: Analysis 🔍
Screen ID: GI000081
☐ Expose via OData

Arrange Parameters in: 3 columns
Select top: 0 records
Records per Page: 0
☐ Number Pages

TABLES RELATIONS PARAMETERS CONDITIONS GROUPING **SORT ORDER** ⚠️ RESULTS

🔄 + × ↑ ↓ ⇄ ☒

	Active	Data Field	Sort Order
 	<input checked="" type="checkbox"/>	Customer.AcctCD	Ascending
>  	<input checked="" type="checkbox"/>	ARTran.RefNbr	Descending

Generic Inquiry - Grouping

Revision Two HQ ▾ Generic Inquiry ★

📁 ↶ + 🗑️ 📄 ⏪ ⏩ > >| VIEW INQUIRY

* Inquiry Title: Invoiced items per Customer 🔍

Site Map Title: Invoiced items per Customer

Site Map Location: Analysis 🔍

Screen ID: GI000081

Arrange Parameters in: 3 columns

Select top: 0 records

Records per Page: 0

☐ Number Pages

☐ Expose via OData

TABLES RELATIONS PARAMETERS CONDITIONS **GROUPING** SORT ORDER ⚠️ RESULTS GRID ENTRY POINT NAVIGATION

🔄 + × ↑ ↓ ⇄ ☒

📄	📄	📄	Active	Data Field
>	📄	📄	☑	ARInvoice.CustomerID
	📄	📄	☑	ARTran.InventoryID

Generic Inquiry - aggregate function

Revision Two HQ ▾ Generic Inquiry ★

NOTES FILES CUSTOMIZATION TOOLS ▾

VIEW INQUIRY

* Inquiry Title: Invoiced items per Customer ⓘ
Site Map Title: Invoiced items per Customer
Site Map Location: Analysis ⓘ
Screen ID: GI000081
☐ Expose via OData

Arrange Parameters in: 3 columns
Select top: 0 records
Records per Page: 0
☐ Number Pages

TABLES RELATIONS PARAMETERS CONDITIONS GROUPING SORT ORDER **RESULTS GRID** ENTRY POINT NAVIGATION

⌂ + × ↑ ↓ ⇄ ☒

⌂	📄	Active	Object	Data Field	Schema Field	Width (px)	Visible	Default Navigation	Navigate To	Aggregate Function
📄	📄	<input checked="" type="checkbox"/>	ARInvoice	DocType			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
📄	📄	<input checked="" type="checkbox"/>	ARInvoice	RefNbr			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		COUNT
📄	📄	<input checked="" type="checkbox"/>	ARTran	InventoryID	!		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
📄	📄	<input checked="" type="checkbox"/>	ARTran	TranDesc			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
📄	📄	<input checked="" type="checkbox"/>	ARInvoice	CustomerID	!		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
>	📄	<input checked="" type="checkbox"/>	ARInvoice	CuryLineTotal			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		SUM

Poll question 2

What feature can be used to find underlying Data Access Classes for data fields

Exercise 3: close to a pro

- Add parameters
- Add appropriate conditions for parameters

Generic Inquiry - parameters

Revision Two HQ ▾ Generic Inquiry ★

NOTES FILE

VIEW INQUIRY

* Inquiry Title: Invoiced items per Customer ⓘ
Site Map Title: Invoiced items per Customer
Site Map Location: Analysis ⓘ
Screen ID: GI000081
☐ Expose via OData

Arrange Parameters in: 3 columns
Select top: 0 records
Records per Page: 0
☐ Number Pages

TABLES RELATIONS **PARAMETERS** CONDITIONS GROUPING SORT ORDER RESULTS GRID ENTRY POINT NAVIGATION MASS

COMBO BOX VALUES...

Active	Is Required	*Name	Schema Field	Display Name	From Schema	Default Value
<input checked="" type="checkbox"/>	<input type="checkbox"/>	From	ARInvoice.DocDate	From	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	To	ARInvoice.DocDate	To	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	Test	Customer.AcctCD		<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Emailed	<Checkbox>	Emailed	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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Generic Inquiry - conditions with parameters

Revision TWO HQ - Generic Inquiry

VIEW INQUIRY

* Inquiry Title: Invoiced items per Customer
Site Map Title: Invoiced items per Customer
Site Map Location: Analysis
Screen ID: GI000081
☐ Expose via OData

Arrange Parameters in: 3 columns
Select top: 0 records
Records per Page: 0
☐ Number Pages

TABLES RELATIONS PARAMETERS **CONDITIONS** GROUPING SORT ORDER RESULTS GRID ENTRY POINT NAVIGATION MA

Active	Brackets	Data Field	Condition	From Schema	Value 1	Value 2
<input checked="" type="checkbox"/>		ARInvoice.DocType	Equals	<input type="checkbox"/>	= 'Invoice'	
<input checked="" type="checkbox"/>		ARTran.InventoryID	Is Not Null	<input type="checkbox"/>		
<input checked="" type="checkbox"/>		ARInvoice.DocDate	Is Between	<input type="checkbox"/>	= [From]	[To]
<input checked="" type="checkbox"/>		ARInvoice.Emailed	Equals	<input type="checkbox"/>	[Emailed]	

Poll question 3

The inquiry parameters used in the inquiry conditions must be specified in

Exercise 4: You are a Pro!

- Add entry screen
- Set mass actions

Generic Inquiry - Entry Point

Revision Two HQ ▾ Generic Inquiry ★

NOTES

VIEW INQUIRY

* Inquiry Title: InvoicedItemsPerCustomer
Site Map Title: Customer Invoiced Items
Site Map Location: Analysis
Screen ID: GI000081
☐ Expose via OData

Arrange Parameters in: 3 columns
Select top: 0 records
Records per Page: 0
☐ Number Pages

TABLES RELATIONS PARAMETERS CONDITIONS GROUPING SORT ORDER RESULTS GRID ENTRY POINT NAVIGATION

ENTRY SCREEN SETTINGS

Entry Screen: Invoices and Memos
☒ Replace Entry Screen with this Inquiry in Menu

OPERATIONS WITH RECORDS

☐ Enable Mass Actions on Records
☐ Enable Mass Record Deletion
☐ Auto-Confirm Custom Delete Confirmations
☐ Enable Mass Record Update
☐ Enable New Record Creation

New Record Defaults

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Generic Inquiry - Mass Actions

Revision Two HQ ▾ Generic Inquiry ★

NOTES FILES CUSTOMIZATION

VIEW INQUIRY

* Inquiry Title: InvoicedItemsPerCustomer Arrange Parameters in: 3 columns
Site Map Title: Customer Invoiced Items Select top: 0 records
Site Map Location: Analysis Records per Page: 0
Screen ID: GI000081 ☐ Number Pages
☐ Expose via OData

TABLES RELATIONS PARAMETERS CONDITIONS GROUPING SORT ORDER RESULTS GRID ENTRY POINT NAVIGATION MASS UPDATE FIELDS

ENTRY SCREEN SETTINGS

Entry Screen: Invoices and Memos
☒ Replace Entry Screen with this Inquiry in Menu

OPERATIONS WITH RECORDS

☒ Enable Mass Actions on Records
☐ Enable Mass Record Deletion
☐ Auto-Confirm Custom Delete Confirmations
☒ Enable Mass Record Update
☒ Enable New Record Creation

New Record Defaults

C + X

*Field *Value

Generic Inquiry - Mass update fields

Revision Two HQ ▾ Generic Inquiry ★

📁 ↺ + 🗑️ 📋 ▾ ⏪ ⏩ ⏴ ⏵ VIEW INQUIRY

* Inquiry Title: InvoicedItemsPerCustomer 🔍

Site Map Title: Customer Invoiced Items

Site Map Location: Analysis 🔍

Screen ID: GI000081

☐ Expose via OData

Arrange Parameters in:

Select top:

Records per Page:

☐ No

TABLES RELATIONS PARAMETERS CONDITIONS GROUPING SORT C

🔄 + ✕ ⏪ ⏵

📋	<input type="checkbox"/>	Field Name
>	<input checked="" type="checkbox"/>	Cash Account

Exercise 5: Level Expert!

- Add navigation to a different form
- Update results grid accordingly

Generic Inquiry - navigation

Revision Two HQ ▾ Generic Inquiry ★

NOTES FILES CUSTOMIZATION TOOL

VIEW INQUIRY

* Inquiry Title: InvoicedItemsPerCustomer
Site Map Title: Customer Invoiced Items
Site Map Location: Analysis
Screen ID: GI000081
☐ Expose via OData

Arrange Parameters in: 3 columns
Select top: 0 records
Records per Page: 0
☐ Number Pages

TABLES RELATIONS PARAMETERS CONDITIONS GROUPING SORT ORDER RESULTS GRID ENTRY POINT **NAVIGATION** MASS UPDATE FIELDS

Screens	Navigation Parameters
AR301000 - Invoices and Memos	
AR632500 - AR Balance by Customer	

* Field	* Parameter	From Schema
DocType	ARInvoice.DocType	<input type="checkbox"/>
RefNbr	ARInvoice.RefNbr	<input type="checkbox"/>

Generic Inquiry - results grid with navigation

Revision Two HQ ▾ Generic Inquiry ★

NOTES FILES CUSTOMIZATION TOOLS

VIEW INQUIRY

* Inquiry Title: InvoicedItemsPerCustomer Arrange Parameters in: 3 columns
Site Map Title: Customer Invoiced Items Select top: 0 records
Site Map Location: Analysis Records per Page: 0
Screen ID: GI000081 ☐ Number Pages
☐ Expose via OData

TABLES RELATIONS PARAMETERS CONDITIONS GROUPING SORT ORDER **RESULTS GRID** ENTRY POINT NAVIGATION MASS UPDATE FIELDS

Active	Object	Data Field	Schema Field	Width (px)	Visible	Default Navigation	Navigate To	Aggregate Function
<input checked="" type="checkbox"/>	ARInvoice	DocType			<input checked="" type="checkbox"/>	<input type="checkbox"/>	AR301000 - Invoices and M...	
<input checked="" type="checkbox"/>	ARInvoice	RefNbr			<input checked="" type="checkbox"/>	<input type="checkbox"/>	AR301000 - Invoices and M...	
<input checked="" type="checkbox"/>	ARInvoice	DocDate			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	ARInvoice	OrigDocAmt			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		MAX
<input checked="" type="checkbox"/>	ARInvoice	CustomerID	!		<input checked="" type="checkbox"/>	<input type="checkbox"/>	AR632500 - AR Balance by ...	
<input checked="" type="checkbox"/>	ARTran	InventoryID	!		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	ARInvoice	CashAccountID	!		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

Exercise 6: Level Master!

- Expose GI to odata
- Use Gi as a screen source for export scenario

How to use gi with odata

Revision Two HQ ▾ Generic Inquiry ★

VIEW INQUIRY

* Inquiry Title: InvoicedItemsPerCustomer
Site Map Title: Customer Invoiced Items
Site Map Location: Analysis
Screen ID: GI000081
☒ Expose via OData

Arrange Parameters in: 3 columns
Select top: 0 records
Records per Page: 0
☐ Number Pages

TABLES RELATIONS PARAMETERS CONDITIONS GROUPING SORT ORDER RESULTS GRID

* Table Name	* Alias
PX.Objects.AR.ARInvoice	ARInvoice
PX.Objects.AR.ARTran	ARTran

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Use gi in an export scenario

Revision Two HQ ▾ Export Scenarios ★

NOTES FILES (1) CUSTOMIZATION

VIEW SCREEN

* Name: Export Invoices per Customer ☒ Active

* Screen Name: Customer Invoiced Items ☐ Export Only Mapped Fields

* Provider: Export AR Customers

* Provider Object: Sheet1

Sync Type: Full

Format Locale:

Inverse Mapping ID:

MAPPING SOURCE RESTRICTIONS

INSERT Show All Commands

Active	* Source Object	* Field / Action Name	Commit	Target Field / Value	Ignore E
<input checked="" type="checkbox"/>	Result	<Key: ARInvoice_docType>	<input type="checkbox"/>	=[Results.ARInvoice...	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Result	<Key: ARInvoice_refNbr>	<input type="checkbox"/>	=[Results.ARInvoice...	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Result	Reference Nbr. (ARInvoice_refNbr)	<input type="checkbox"/>	Customer Class	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Result	Customer	<input type="checkbox"/>	Customer ID	<input type="checkbox"/>

KEY POINTS to remember

- ▶ Don't have to be a developer or DB Admin to build generic inquiries
- ▶ Inspect element feature
- ▶ Recognize key fields (comes with experience!)
- ▶ Build the gi gradually
- ▶ DACs do not necessarily match actual tables in data base
- ▶ Acumatica uses virtual dacs also that get data at run-time and as such do not display values in a generic inquiry
- ▶ Gis can be exposed to odata
- ▶ to schedule an export of data from multiple screens, use the Gi as a source screen in an export scenario

Additional exercises:

- ▶ Show closed financial periods
- ▶ Set the current default period in a parameter
- ▶ Using the @me condition
- ▶ Showing attributes on GI
- ▶ Restriction groups and Gis

Day 2: Report Designer

Overview of Report Designer and Reports

Goals for the day

- Get familiar with Report Designer application
- Create and modify existing reports



Objectives

In this lesson you will learn how to...

- Understand Report structure
- Modify existing reports
- Create new reports

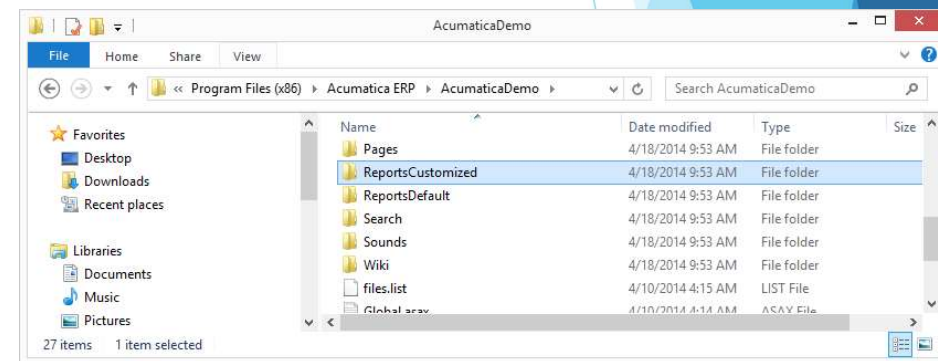
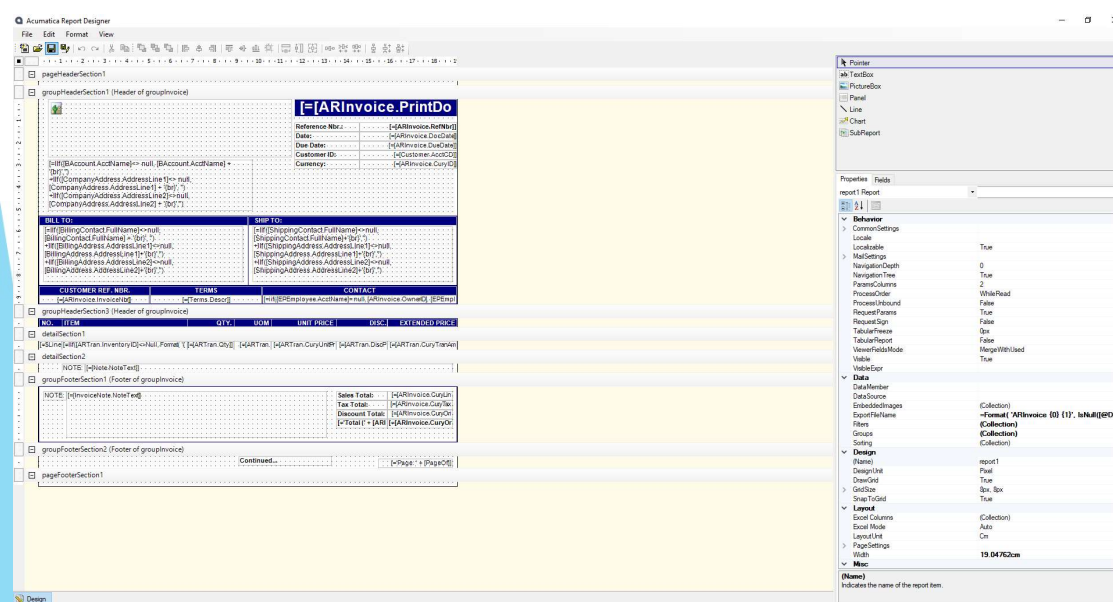


Agenda

- Report Designer overview
- Modifying a report with Report Designer
- Creating a report in Report Designer
- Scheduling reports

What is Report Designer?

Report Designer is an Acumatica proprietary application that provides visual tools for creating and modifying reports for use in Acumatica ERP



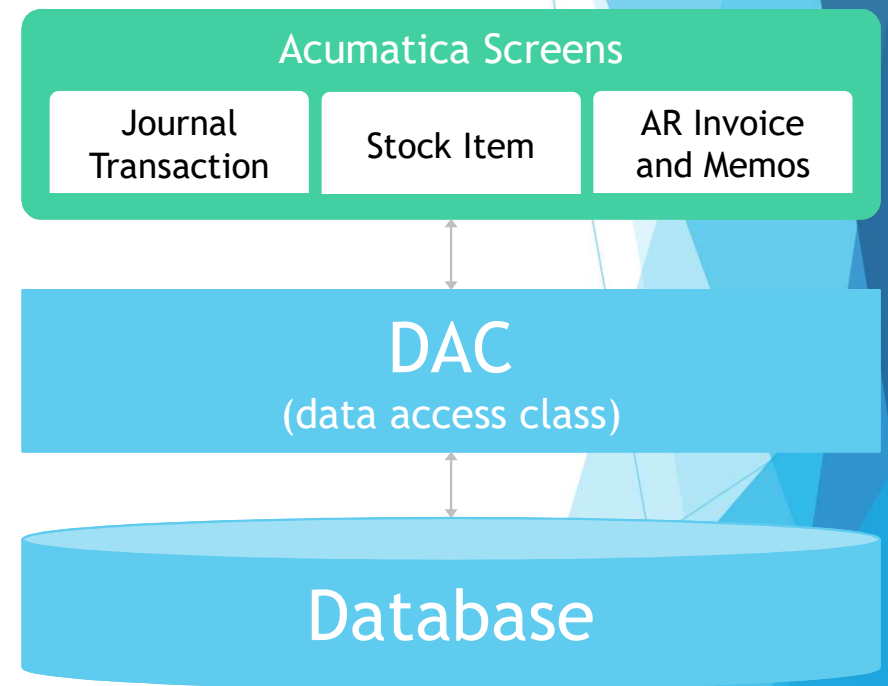
How does it work?

- Standalone application
- Works only on Windows
- Uses Data Access Classes to retrieve data from Data Base
- Uses report engine to format the data and display the formatted output



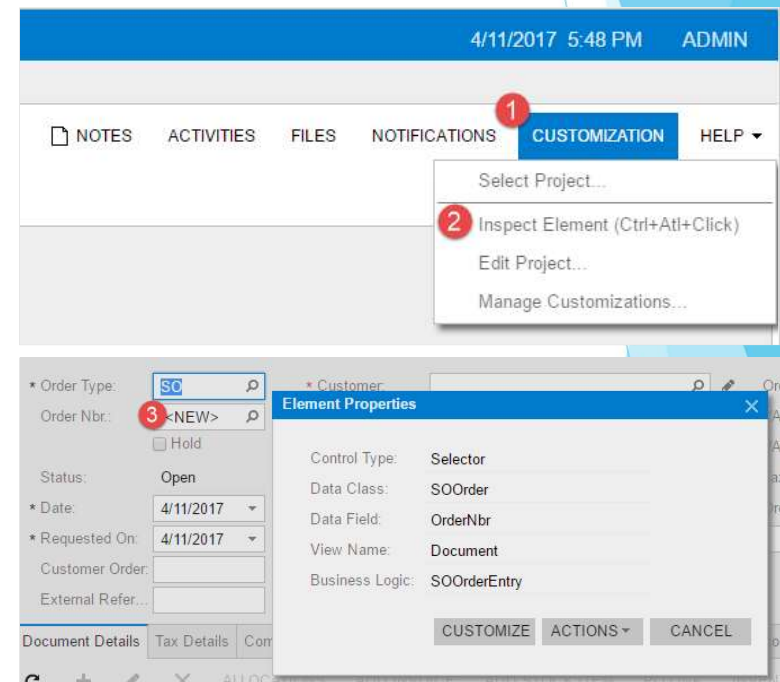
Data Access Classes

- DAC: Similar to database, but not identical
- Other terms
 - BQL
 - Schema



Finding Field Names

- Customizer role required
- Click “Inspect Element”
- Click field you want to learn about
 - Data Class (table)
 - Data Field (field name)
- Natural key (CD) versus surrogate/machine key (ID)



Report Designer Role

- Allows editing reports directly from screens
 - Assign role in Configuration > User Security > Manage > Users

* Login: Sta

☐ Guest Account

User Type:

Linked Entity:

First Name:

Last Name:

* Email:

Comment:

Roles Statistics IP filter External Identities Personal Settings

C

Selected	Role Name	Role Description
<input type="checkbox"/>	Guest	External Guest role
<input type="checkbox"/>	Internal User	Allows the user to change personal settings, a...
<input type="checkbox"/>	Portal Admin	Access to portal configuration
<input type="checkbox"/>	Portal User	Portal user
<input type="checkbox"/>	PURCHASING	Purchasing
<input type="checkbox"/>	READONLY	Read only role
<input checked="" type="checkbox"/>	ReportDesigner	Report Designer
<input type="checkbox"/>	SALES	Sales
<input type="checkbox"/>	SALES REP	Sales Rep

Revision Two HQ ▾ Pick List ★

RUN REPORT SAVE TEMPLATE REMOVE TEMPLATE SCHEDULE TEMPLATE **EDIT REPORT**

Template ▾

☐ Default ☐ Shared

Report Parameters Additional Sort and Filters Print and Email Settings Report Versions

Shipment Nbr:

Running an existing report

- Print and Email Settings
 - Print settings
 - Email settings
- In Report Designer
 - Activity Source
 - Template IDs

Revision Two HQ - Invoice/Memo - alt

RUN REPORT SAVE TEMPLATE REMOVE TEMPLATE SCHEDULE TEMPLATE EDIT REPORT

Template x

☐ Default ☐ Shared

Report Parameters Additional Sort and Filters **Print and Email Settings** Report Versions

PRINT SETTINGS

Deleted Records

☐ Print all pages

☐ Print in PDF format

☒ Compress PDF file

☒ Embed fonts in PDF file

EMAIL SETTINGS

Format To

CC BCC

Subject

Running an existing report

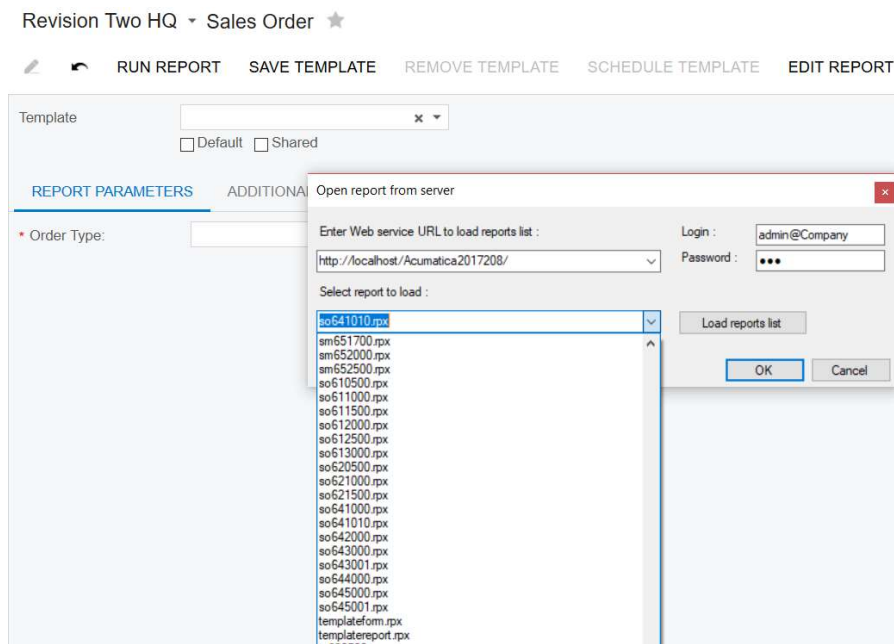
- Additional Sorts and Filters
 - Sorting conditions: Shows existing and lets you over-ride
 - Filtering conditions: Add to existing filters

The screenshot displays the Acumatica report configuration interface. At the top, there are navigation buttons: RUN REPORT, SAVE TEMPLATE, REMOVE TEMPLATE, SCHEDULE TEMPLATE, and EDIT REPORT. Below these is a 'Template' dropdown menu with a search icon and checkboxes for 'Default' and 'Shared'. The main configuration area has four tabs: Report Parameters, Additional Sort and Filters (which is active), Print and Email Settings, and Report Versions. Under the 'Additional Sort and Filters' tab, there are two sections: 'Additional Sorting Conditions' and 'Additional Filtering Conditions'. The 'Additional Sorting Conditions' section has a table with two columns: 'Property' and 'Condition'. It contains one entry: 'Customer.Customer ID' with the condition 'Ascending'. The 'Additional Filtering Conditions' section has a table with columns: Brackets, Property, Condition, Value, Second Value, Brackets, and Operator. It contains one entry: an asterisk (*) in the Brackets column, a dropdown in the Property column, 'Equals' in the Condition column, and empty fields for Value, Second Value, and Operator.

Additional Sorting Conditions		Additional Filtering Conditions						
Property	Condition	Brackets	Property	Condition	Value	Second Value	Brackets	Operator
Customer.Customer ID	Ascending	*		Equals				

Opening a report to be modified

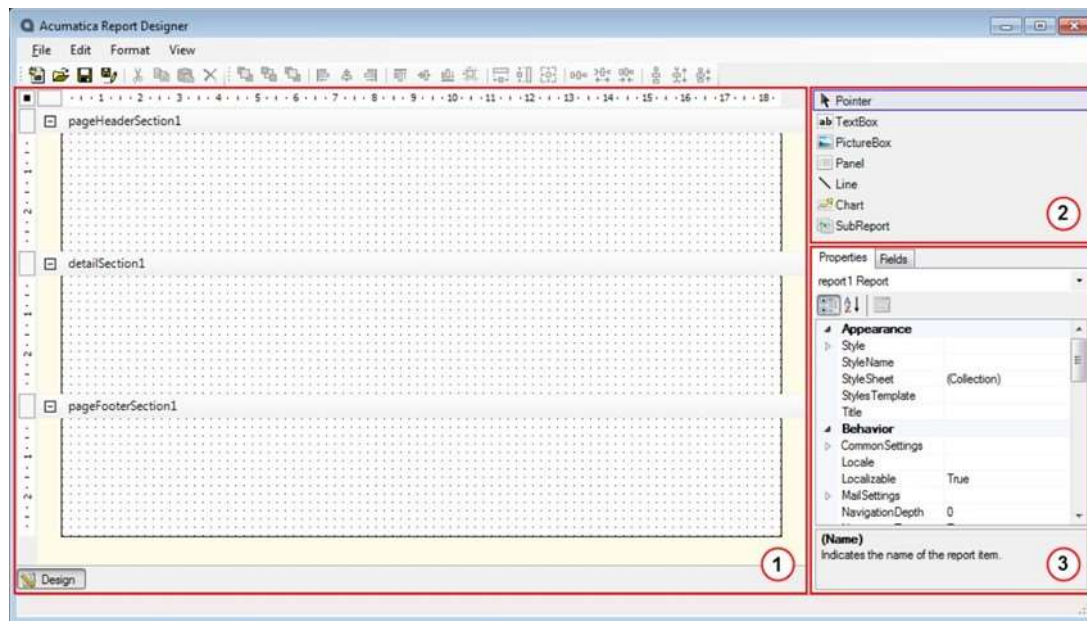
- Directly from the ERP Instance
- Open Report Designer and enter URL and login credentials



Creating a new report

- Basic SQL knowledge on how to join tables and conditions for joining
- Structure of the Report Designer itself

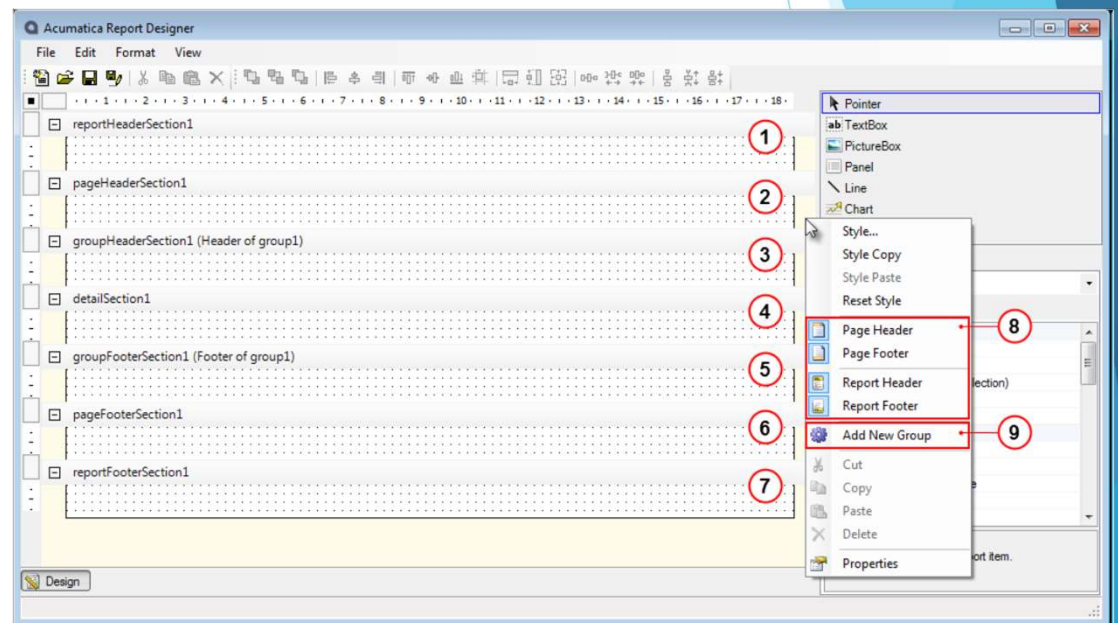
Report Designer



1. Design Area
2. Tools Area
3. Properties and Fields Area

Modifying a Report Layout

- Detail
- Group header(s) and footer(s)
- Page header and footer
- Report header and footer



Adding Fields to the Header



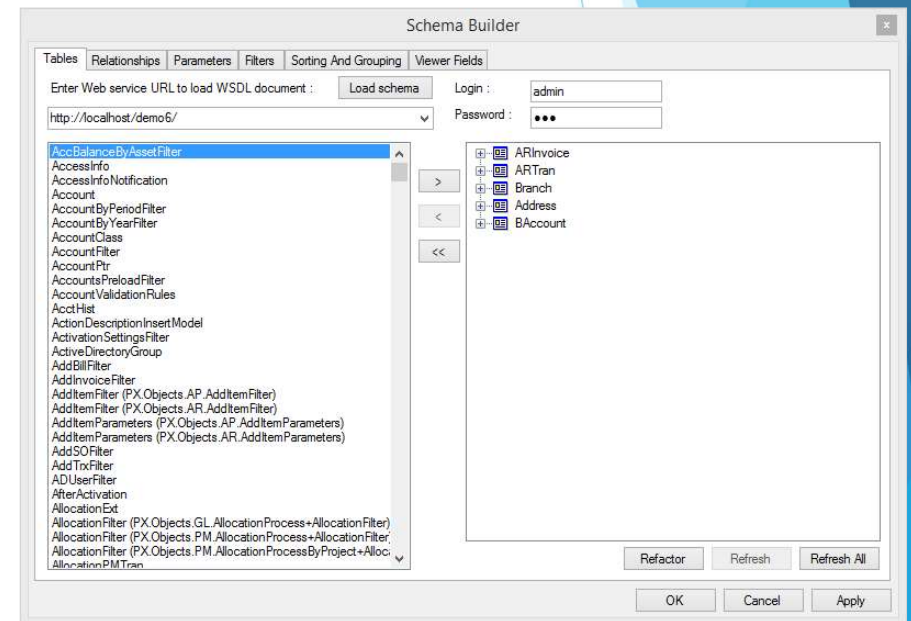
- Company ID
 - =Report.GetDefUI('RowCompanyBAccount.AcctName')
- Logged In User
 - =Report.GetDefUI('RowAccessInfo.DisplayName')
- Page numbers
 - Global variables in expression builder

Poll question 1

What is the Report Designer used for?

Building a Schema in Report Designer

- Tables
- Relationships
- Parameters
- Filters
- Sorting and Grouping
- Viewer Fields



Selecting Data

- Build 'schema' using the Generic Inquiry Writer
 - Run instantly without saving
 - View / search values of data fields

The screenshot shows the 'Generic Inquiry' window in a software application. The title bar indicates 'MAIN - Generic Inquiry'. The interface includes a toolbar with icons for saving, undo, redo, and other actions. Below the toolbar, there are input fields for 'Inquiry Title' (set to 'ItemPurchasesByCustomer'), 'Select Top' (0 records), 'Arrange parameters in' (3 columns), 'Results on Page' (0), 'Site Map Location', 'Site Map Title', 'Created By' (admin - admin), and 'Creation Date' (4/23/2014 9:45 PM). A 'Numbered Pager' checkbox is also present. The main area is divided into tabs: 'Tables', 'Relations', 'Parameters', 'Conditions', 'Grouping', 'Sort Order', and 'Results Grid'. The 'Results Grid' tab is active, displaying a table with columns: 'Active', 'Object', 'Data Field', 'Schema Field', 'Width (px)', 'Visible', 'Aggreg. Functio', and 'Caption'. The table contains several rows of data, including 'Baccount' with 'AcctCD' and 'AcctName', 'SOorder' with 'OrderNbr', 'SOline' with 'InventoryID' and 'InventoryID_Description', 'SOline' with 'OrderQty', 'SOline' with 'UnitCost', and 'SOline' with 'LineAmt'. The 'Visible' column has checkboxes, and the 'Caption' column has labels like 'Quantity', 'Unit Cost', and 'Line Total'.

Active	Object	Data Field	Schema Field	Width (px)	Visible	Aggreg. Functio	Caption
<input checked="" type="checkbox"/>	Baccount	AcctCD		100	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Baccount	AcctName		120	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	SOorder	OrderNbr		80	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	SOline	InventoryID		90	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	SOline	InventoryID_Description		120	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	SOline	OrderQty		80	<input checked="" type="checkbox"/>		Quantity
<input checked="" type="checkbox"/>	SOline	UnitCost		80	<input checked="" type="checkbox"/>		Unit Cost
<input checked="" type="checkbox"/>	SOline	LineAmt		100	<input checked="" type="checkbox"/>		Line Total

Setting Parameters

- Similar to Generic Inquiry
 - Data Type
 - Report.GetFieldSchema
 - Default values

The screenshot shows the 'Schema Builder' dialog box with the 'Parameters' tab selected. On the left, a list of fields includes 'CustomerID', 'StartDate', and 'EndDate', with 'CustomerID' selected. Below this list are 'Add' and 'Remove' buttons. The main area contains the following fields:

- Name :** CustomerID
- Input mask :** (empty)
- Data Type :** String
- View name :** =Report.GetFieldSchema(ARInvoice.CustomerID)
- Prompt :** Customer ID
- Default value :** (empty)
- Column span :** 2
- Allow Null :** ☒
- Visible :** ☒
- Required :** ☐

At the bottom, there is an 'Available values' section with a table:

Value	Label
*	

Below the table are 'OK', 'Cancel', and 'Apply' buttons.

Poll question 2



What is the Prompt field used for?

Setting Filters

Similar to Generic Inquiry

Schema Builder

Tables Relationships Parameters **Filters** Sorting And Grouping Viewer Fields

Data Field Formula  

	Braces	Data Field	Condition	Value1	Value2	Braces	Operator
	(	@CustomerID	IsNull				Or
		ARInvoice.CustomerID	Equal	@CustomerID		)	And
▶	(	@StartDate	IsNull ▼				Or
		ARInvoice.DocDate	GreaterOrEqual	@StartDate		)	And
	(	@EndDate	IsNull				Or
		ARInvoice.DocDate	LessOrEqual	@EndDate		)	And
*							

Sorting and Grouping

- Bigger Role than Generic Inquiry
 - Schema area
 - Report properties area

The image shows two side-by-side dialog boxes: 'GroupExp Collection Editor' and 'Group Collection Editor'. The 'GroupExp Collection Editor' has a 'Members' list with 'PX Reports.GroupExp' and a 'Misc' section with 'DataField' set to '[ARInvoice.Custome' and 'SortOrder' set to 'Ascending'. The 'Group Collection Editor' has a 'Members' list with 'Customers' and a 'Behavior' section with 'Description' set to '=Customer Items' (Collection), 'Keep Together' set to 'FirstDetail', and 'Print.Empty' set to 'False'. A 'Design' section shows '(Name)' set to 'Customers'. To the right is a 'Properties' list with various settings. Red circles 1 through 4 highlight specific elements: 1 points to 'Filters' in the Properties list, 2 points to the 'Add' button in the 'Group Collection Editor', 3 points to the 'Description' property in the 'Group Collection Editor', and 4 points to the 'DataField' property in the 'GroupExp Collection Editor'.

Property	Value
NavigationTree	True
ParamsColumns	2
ProcessOrder	WhileRead
ProcessUnbound	False
RequestParams	True
RequestSign	False
TabularFreeze	0px
TabularReport	False
ViewerFieldsMode	MergeWithUsed
Visible	True
VisibleExpr	
Data	
DataMember	
DataSource	
EmbeddedImages	(Collection)
ExportFileName	
Filters	(Collection)
Groups	(Collection)
Sorting	(Collection)
Design	
(Name)	report1
DesignUnit	Pixel
DrawGrid	True

Publish and Test

- Save to server
- Add to sitemap
- Run

Save report on server

Enter Web service URL to load reports list : Login :
Password :

Enter report name to save :

Version description :
☐ Save as new version

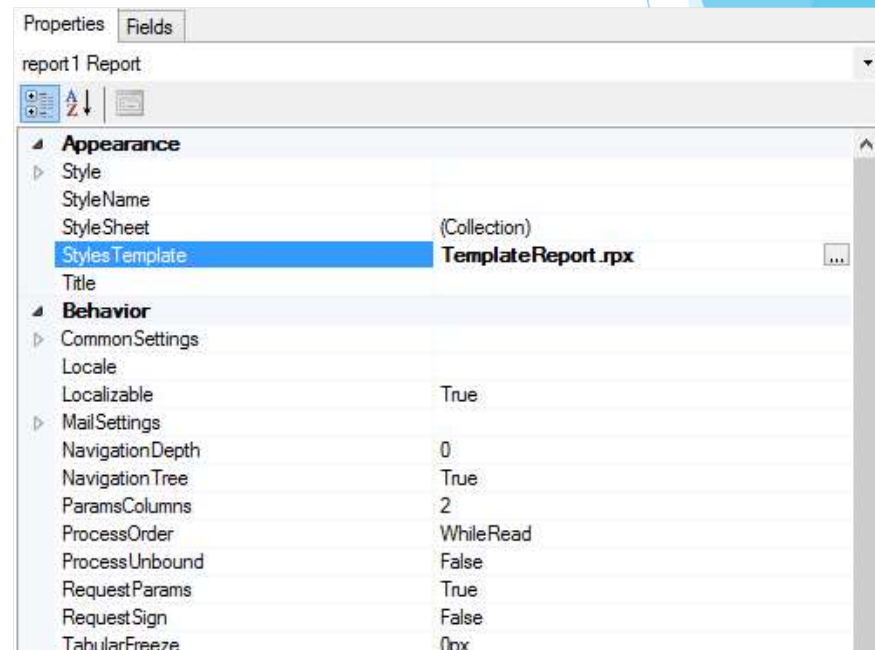
Screen ID	Title	Icon	Url	G
AR.67.60.00	Daily Sales Profitability		~/Frames/ReportLauncher.aspx?ID=AR676000.rpx	
AR.67.30.00	Sales Profitability by Salesperson an...		~/Frames/ReportLauncher.aspx?ID=AR673000.rpx	
AR.67.20.00	Sales Profitability by Customer and ...		~/Frames/ReportLauncher.aspx?ID=AR672000.rpx	
AR.67.50.00	Sales Profitability by Customer Clas...		~/Frames/ReportLauncher.aspx?ID=AR675000.rpx	
AR.67.10.00	Sales Profitability by Item and Order		~/Frames/ReportLauncher.aspx?ID=AR671000.rpx	
AR.67.40.00	Sales Profitability by Item Class and...		~/Frames/ReportLauncher.aspx?ID=AR674000.rpx	
AR.67.40.05	My New Report		~/Frames/ReportLauncher.aspx?ID=Test.rpx	

Poll question 3

To open the report from the corresponding report form in Acumatica ERP, you must have the following role assigned to you...

Using formatting templates

- Use Templates to:
 - Provide consistency
 - Simplify mass changes



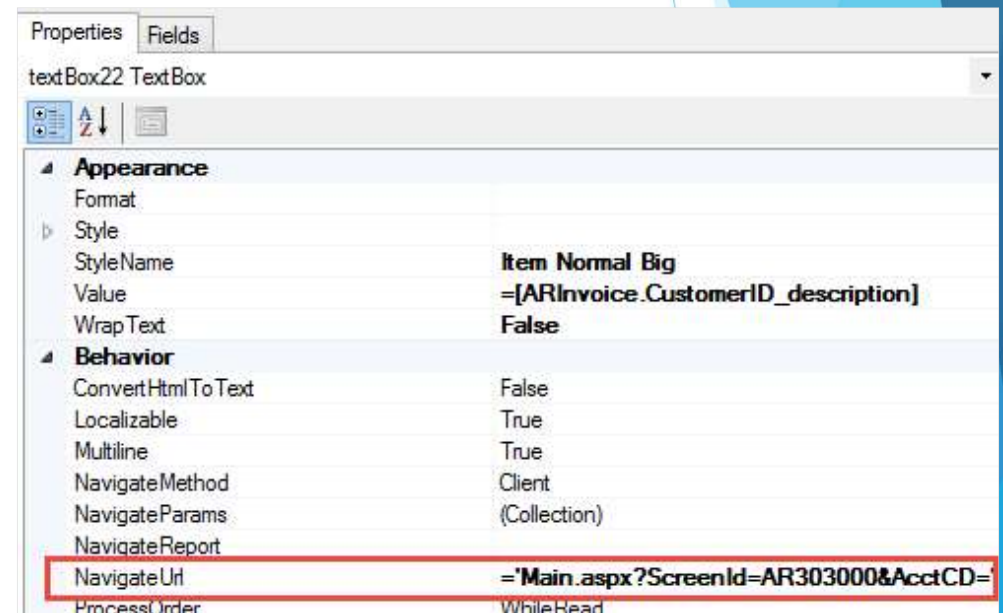
Scheduling Reports

- Scheduling Reports
 - Create schedule
 - Add reports to schedule

The screenshot shows the 'Revision Two HQ Automation Schedules' configuration window. At the top, there's a 'Select Schedule Name' dropdown with '<Setup a schedule first>' selected. Below it, a 'Merge Reports' button is visible. The main configuration area includes fields for 'Screen ID' (Send Reports), 'Schedule ID' (Send Financial Reports), 'Description' (Send Financial Reports), and 'Action Name' (Process All). There are checkboxes for 'Active' and 'No Execution Limit', and a 'Process with Branch' dropdown. The 'Execution Limit' is set to 1, and 'Executed' is 0. The 'Starts On' date is 4/12/2017, and 'Expires On' is set to 'No Expiration Date'. The 'Time Zone' is '(GMT-08:00) Pacific Time (U)'. The 'Next Execution Date' is 5/1/2017. The 'Schedule Type' is 'By Financial Period'. Under 'BY FINANCIAL PERIOD', the 'Every' field is 1 Period(s), and the 'Start of the Period' radio button is selected. Under 'MONTHLY', the 'Every' field is 1 Month(s), and the 'On Day' radio button is selected with the value 1. Under 'WEEKLY', the 'Every' field is 1 Week(s), and the 'Sunday' radio button is selected. Under 'DAILY', the 'Every' field is 1 Day(s).

Linking and navigation

- Link to URL / Screen
- Link to Report
 - Pass Parameters



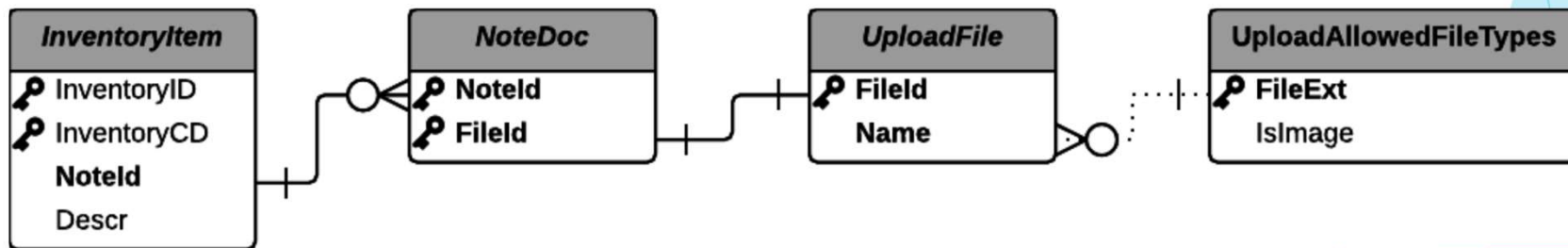
Formatting Values Displayed on a Report

- Format specifiers of any data fields used in a report
 - =[ARTran.TranAmt.Format]
- Standard numeric format specifiers
 - P: 0.39 -> 39.00%
- Custom numeric format specifiers
 - ###,##0.00: 123 -> 123.00
- Standard date format specifiers
 - d: 2017-04-12T13:45:30 -> 04/12/2017
- Custom date format specifiers
 - dd: 2017-04-02T13:45:30 -> 02

Adding Graphics

Types of graphics

- Embedded
- External
- Barcode
- Database



Defining Excel Settings

- Excel properties for each cell
- Auto or manual mode

The screenshot displays the Acumatica report designer interface for a report titled "Invoices Commissionable by Salespers". The layout is organized into several sections, each with a grid of cells for defining data and formulas. The sections and their contents are as follows:

- pageHeaderSection1**: Contains fields for Company, User, Print Date, Pages, Start Date, and End Date, each with a corresponding formula (e.g., `[=Report.GetDefUl('Comp...)]`).
- groupHeaderSection1 (Header of SalesPerson)**: Contains a Salesperson field with a formula `[SalesPerson]` and a subReport1 field.
- detailSection1**: Contains a row of data fields: Invoice D, Invoice Nbr, Customer I, Customer Name, Sales, Commission, and Comm.
- groupFooterSection1 (Footer of SalesPerson)**: Contains a field for `[InvCount]` and a formula `[SUM([ARS...])]`.
- pageFooterSection1**: Contains a field for `Continued...` and a formula `[PageC...]`.

KEY POINTS to remember

- ▶ Don't have to be a developer or DB Admin to create or modify reports
- ▶ Inspect element feature
- ▶ Recognize key fields (comes with experience!)
- ▶ Build the report gradually
- ▶ Report Designer role assigned is a must
- ▶ Custom views can be imported and used in Acumatica ERP

Day 3: Report Designer

OMG! More of Report Designer!

Goals for the day

- Become a Pro in creating and troubleshooting reports



Agenda

- Tabular reports
- Using Variables on Reports
- Subreports
- Tips and Tricks

Poll question 1

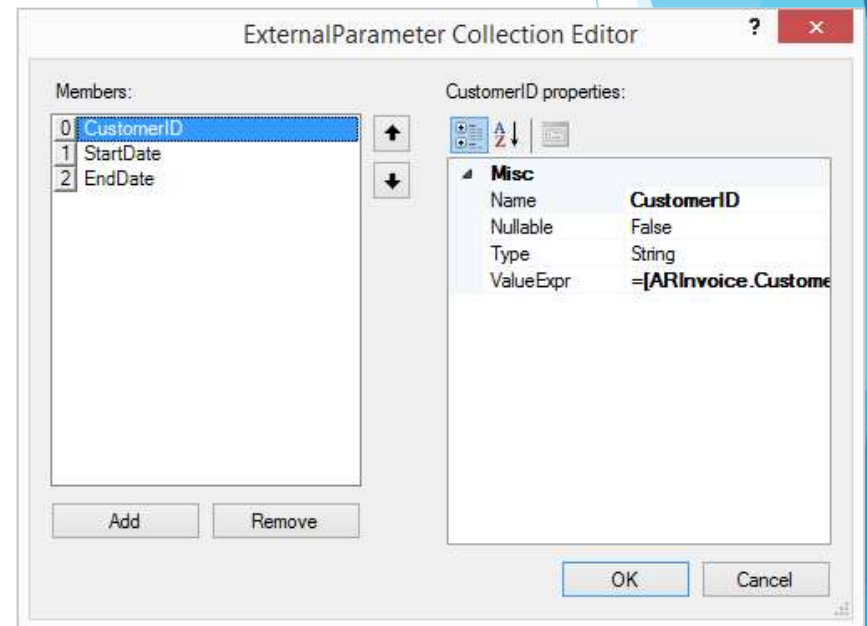
What section of the report contains its main data and is considered a central part of the report?

Poll question 2

Report Designer cannot be used on a Mac computer.

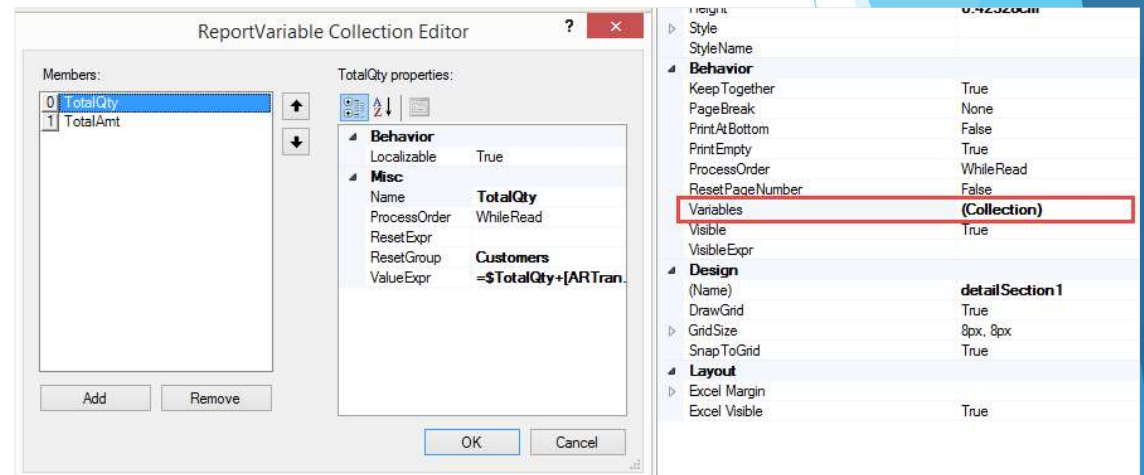
Tabular reports

- Link to Report
 - Verify Size
 - Pass parameters



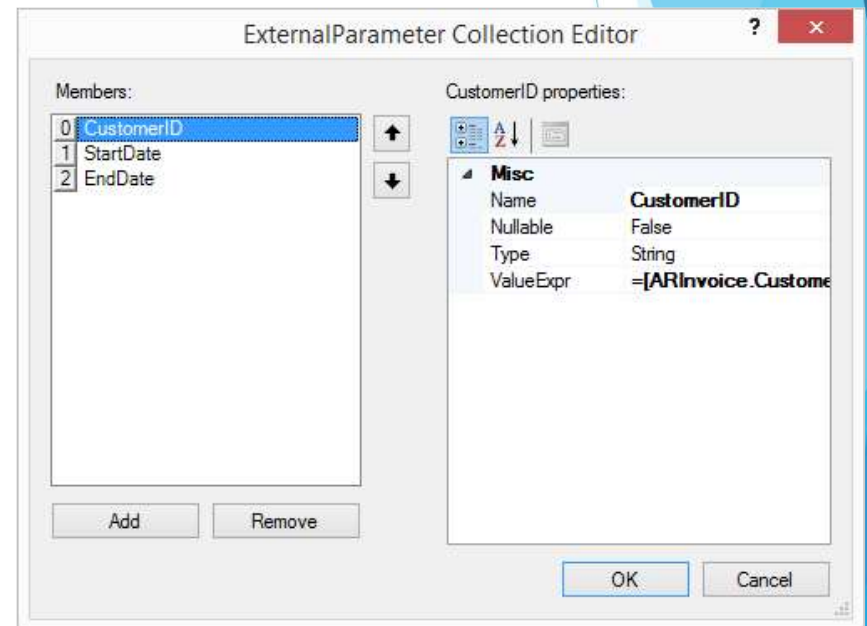
Variables

- Add to section where used
 - Set reset group
 - Set value expression




Adding Sub-Reports

- Link to Report
 - Verify Size
 - Pass parameters



Conditional formatting

**Acumatica**
THE CLOUD ERP

Products Wholesale
11235 SE 6th St.
Suite 140
Bellevue, WA, 98004
Phone: [206-555-1212](tel:206-555-1212)
Web: www.revisiontwo.com

INVOICE

Reference Nbr.: AR005716
Date: 22-Mar-2018
Due Date: 21-Apr-2018
Customer ID: ELITEANSW
Currency: USD

BILL TO:		SHIP TO:	
Elite Answering 377 Watchogue Rd Staten Island NY 10314 United States of America		Elite Answering 377 Watchogue Rd Staten Island NY 10314 United States of America	

CUSTOMER REF. NBR.		TERMS	CONTACT		
		30 Days			

NO.	ITEM	QTY.	UOM	UNIT PRICE	DISC.	EXTENDED PRICE
1	AACOMPUT01: Acer Laptop Computer	5.00	EA	500.00	0%	2,500.00
2	AALEGO500: Lego 500 piece set	10.00	EA	110.00	0%	1,100.00
3	Freight ShipVia FEDEXGROUND	0.00		0.00	0%	51.46

Creating a table grid in Report Designer

Phone: 206-555-1212 Web: www.revisiontwo.com					
BILL TO: USA Bartending School 201 Lower Notch Rd Little Falls NJ 07424 United States of America			SHIP TO: USA Bartending School 201 Lower Notch Rd Little Falls NJ 07424 United States of America		
CUSTOMER REF. NBR.		TERMS 30 Days		CONTACT	
NO.	ITEM	QTY.	UOM	UNIT PRICE	EXTENDED PRICE
1	FOODBREAD: Hot Dog Buns 8 PK (12per pack)	50.00	EA	34.65	1,732.50
2	FOODCHIP36: Wise Potato Chips 1.25oz Bags / 36PK	80.00	EA	20.00	1,600.00
3	FOODHOTDOG: Ball Park Beef Franks 3lbs 2 PK	50.00	EA	34.99	1,749.50
4	FOODKCOF35: Coffee K-Cup Sampler Coffee 35 Count	100.00	EA	22.95	2,295.00
5	FOODSUGAR: Sweet N Low Sugar 12pk	25.00	EA	55.42	1,385.50
6	FOODTEA06: Liptons Cold Brew Tea Bags 6 Pack	50.00	EA	24.88	1,244.00
7	CONGRILLT: Mr BBQ 18 PC Stainless Set & Case	5.00	EA	21.98	109.90
8	AALEGO500: Lego 500 piece set	9.00	EA	21.98	197.82
9	CONBABY1: South Shore Savannah Changing Table	5.00	EA	21.98	109.90
10	CONBABY2: Little Tikes Bold n Bright Table & Chairs	3.00	EA	21.98	65.94
11	CONBABY3: Grac Pack N Play with Newborn Napperstation	4.00	EA	21.98	87.92
12	ELE32LED: Samsung 40-Inch LED HDTV	9.00	EA	21.98	197.82
13	ELEBOARD: Laptop computer motherboard	9.00	EA	21.98	197.82
14	ELECPU1: Intel CPU - 2.6GHz	9.00	EA	21.98	197.82
15	ELEHDD1: Hard drive 1TB 7200rpm	9.00	EA	21.98	197.82
16	ELEHDD2: Hard drive 1 TB SSD	9.00	EA	21.98	197.82
17	ELEHDD3: Hard drive 2TB 7200rpm	9.00	EA	21.98	197.82
18	ELEKINDLE: Kindle Fire 8.9" Tablet HD	9.00	EA	21.98	197.82
19	Group and Document Discount	0.00		0.00	578.35
NOTE:					Sales Total: 11,962.72

MISC on Reports

- Fields not available in tables in Build Schema
- Aging Reports
- Formatted Text from Word in Report Designer
- Shipping address on AR invoice
- Blank page printing on report
- Links not displayed on Excel
- Check form with Remittance sections
- Open report from menu and using @parameter for subreport
- Add a new report on the Reports menu from a screen
- Dependent parameters

Poll question 3

To make the tabular report which you have created on the Report Designer visible for user in Acumatica ERP, you must:

Hands on Exercises

ORDINARY	CHALLENGING	CHALLENGING +
Add Notification Template to Sales Order Report	Show Back Ordered items on the SO Invoice	Print Inventory Item labels per qty
Set Sales Order Details by Inventory Item report to show Quotes	Add Carrier Tracking Numbers to the Shipment Confirmation report	

Day 4:

Filters, Dashboards and Pivot tables

Miscellaneous

Goals of the day

- Use Filters to get the right data for you
- Use Pivot Tables to analyse your data
- Use Generic Inquiries to create dashboards

Agenda

- Filters overview
- Control who sees what
- Creating Pivot tables
- Creating Dashboards

Shared Filters

- Narrow results
- Share for use in dashboards and marketing lists

Revision Two HQ ▾ Invoiced Items ★

ALL RECORDS KEY CUSTOMERS 12 MONTHS

	Account ID	Account Name	Customer Class ID	Address Line 1	City	State
--	------------	--------------	-------------------	----------------	------	-------

Filter Settings

Key Customers 12 months ▾ ☐ Default ☒ Shared

↺ ↻ ↷ ↵ + ✕

<input type="checkbox"/>	Brack	*Property	*Conditio	Value	Value2	Brack	Operat
> <input checked="" type="checkbox"/>		Customer C...	Equals	KEY			And
<input checked="" type="checkbox"/>		Invoice Date	Is Betwe...	@MonthSta...	@MonthStart		And

NEW SAVE SAVE AS REMOVE OK CANCEL

Who can see what?

- Set access rights for generic inquiries
- Set access rights for pivot tables
- Set access rights for dashboards

Poll question 1

Select the option that is NOT TRUE about the reusable filters.

Pivot Tables

- ▶ Define rows and columns
- ▶ Include date fields for special rounding and grouping
- ▶ Include Class fields in filters to provide additional configuration options

The screenshot displays the Acumatica Pivot Tables configuration window. The title bar reads 'Pivot Tables - Google Chrome'. The address bar shows a localhost URL. The main title is 'Revision Two HQ Pivot Tables'. Below the title, there are buttons for 'SAVE & CLOSE', 'VIEW PIVOT', and 'EDIT INQUIRY'. The configuration area is divided into several sections:

- * Screen ID:** Invoiced Items
- Pivot Table ID:** Invoiced Items Pivot
- Shared Filter to Apply:** All Records
- * Name:** Invoiced Items Pivot
- Site Map Location:** (empty)
- Is Shared:** ☐

The main configuration area is divided into four panes:

- Fields:** A list of available fields including Account ID, Account Name, Address Line 1, City, Country, Description, Ext. Amount, Ext. Profit, Financial Period, Invoice Date, Quantity, and Reference Nbr.
- Filters:** A section for adding filters, currently containing 'Customer Class ID' and 'Item Class'.
- Columns:** A section for adding columns, currently containing 'Invoice Date'.
- Values:** A section for adding values, currently containing 'Ext. Cost'.

On the right side, there is a **Properties** pane with the following settings:

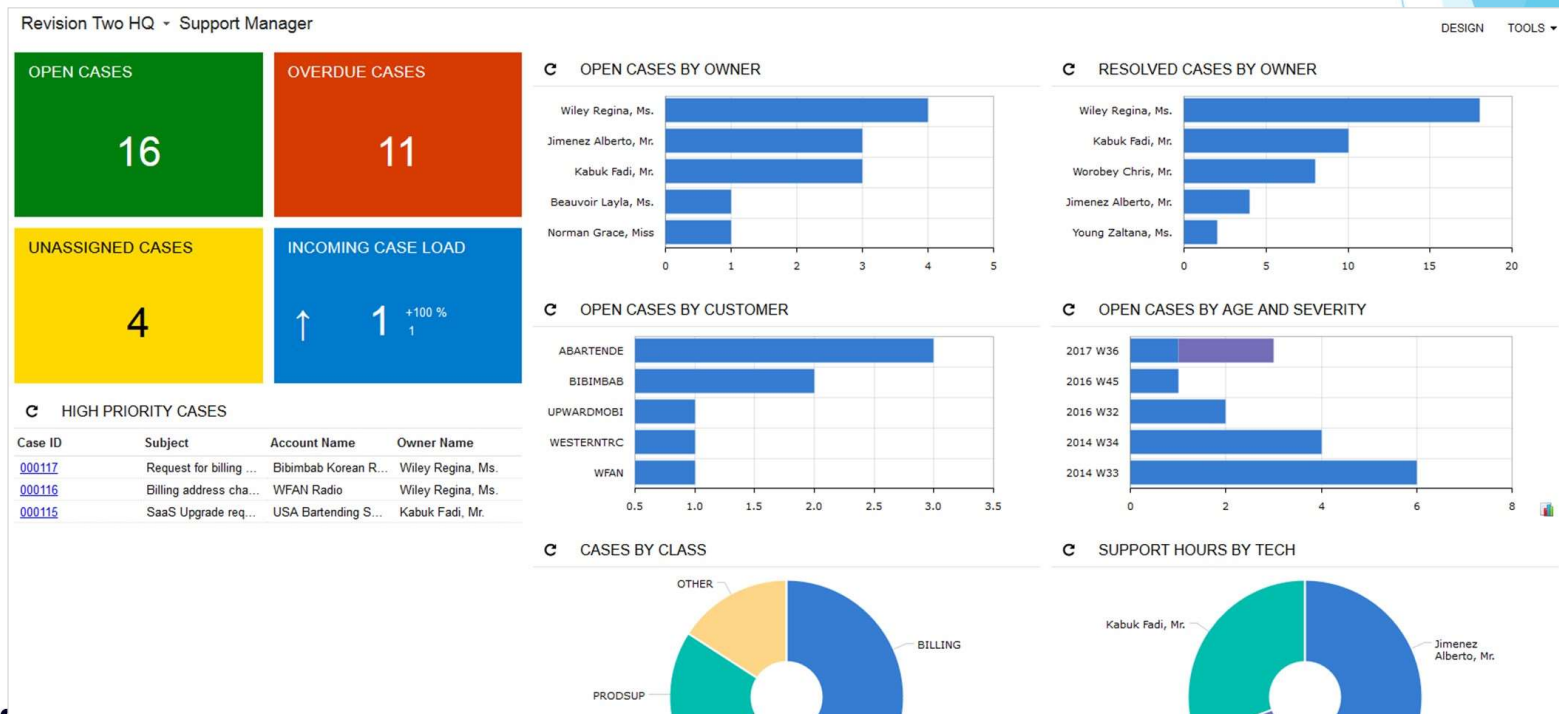
Caption	Item Class
Aggregate	Count
Sort Order	Ascending
Show Percent	<input type="checkbox"/>
Show Total	<input checked="" type="checkbox"/>
Total Label	
Width	100
Format	
Segment	None

Poll question 2

From a single generic inquiry, you can create...

Dashboards

Use generic inquires and shared filters to create dashboards



Dashboards - Data Table

EXPENSES VS BUDGET (ACTIVE PROJECTS)

Description	Created Date	Budgeted Amount	Actual Amount	Budget Less Actual
T&M project with inventory issue	10/22/2015	98,340.00	96,308.48	2,031.52
Marlin Beverage Process Re-archi...	3/2/2017	9,920.00	18,442.00	-8,522.00
Internal projects 2017 - track expe...	3/2/2017	108,500.00	71,897.18	36,602.82
Revenue recongition based on labor	3/2/2017	11,250.00	2,814.10	8,435.90

Widget Properties

Specify the widget properties

* Inquiry Screen:

DB Project Expense vs Budget

INQUIRY PARAMETERS

Shared Filter to Apply:

Active Projects

☐ Automatically Adjust Height

Record Limit:

0

COLUMN SETTINGS

Caption:

Expenses vs Budget (Active Projects)

CANCEL

FINISH

Column Settings

Available Columns

Customer

Employee Login

Employee Name

Project ID

Status

Selected Columns

Description

Created Date

Budgeted Amount

Actual Amount

Budget Less Actual

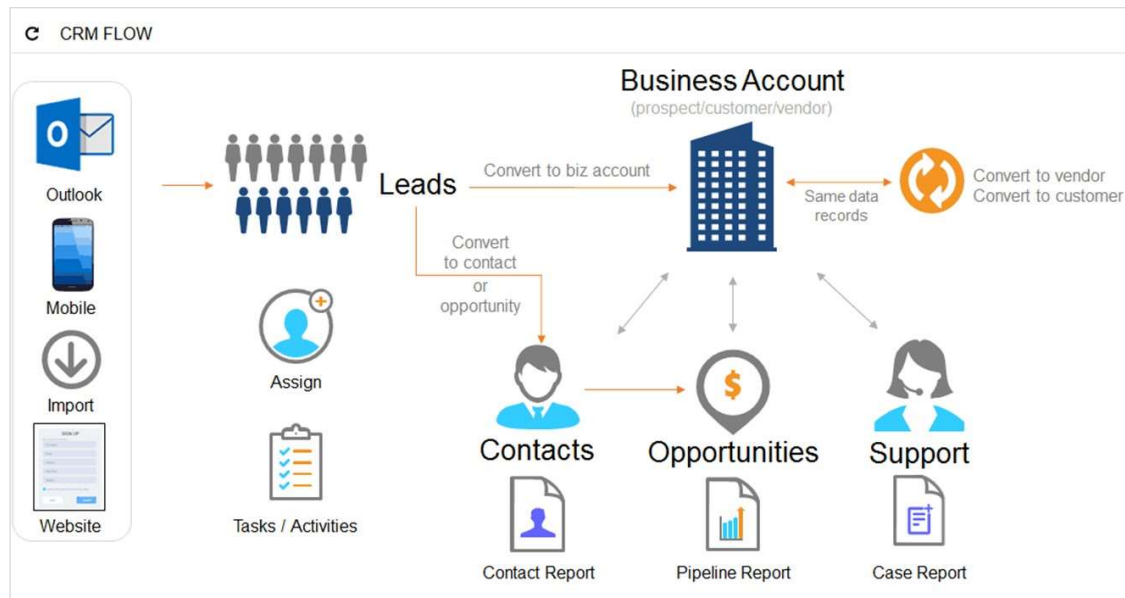
RESET TO DEFAULT

DELETE DEFAULT CONFIGURATION

OK

CANCEL

Dashboards - Wiki Page



Widget Properties

Specify the widget properties

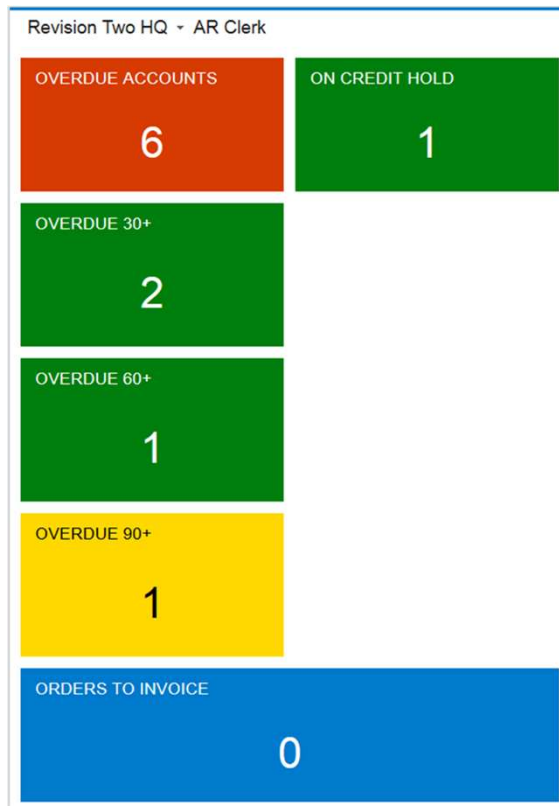
Wiki Article:

Caption:

Poll question 3

Select the option that is NOT TRUE about the reusable filters.

Dashboards - Scorecard KPI



Widget Properties

Specify the widget properties

* Inquiry Screen: DB AR Customer Summary ⓘ

INQUIRY PARAMETERS

Shared Filter to Apply: Overdue 30+ ▾

Scorecard Title: Overdue 30+

* Field to Aggregate: Customer ID ▾

Aggregate Function: Count ▾

Normal Level: 10

Alarm Level: 20

Normal Color: ▾

Warning Color: ▾

Alarm Color: ▾

☐ Automatically Adjust Font Size

* Font Size: 10 ▾

Caption:

CANCEL FINISH

Dashboards - Trendcard KPI



Widget Properties [X]

Specify the widget properties

* Inquiry Screen: DB Cases [P]

INQUIRY PARAMETERS

Shared Filter to Apply: All Records [v]

Trend Card Title: Incoming Case Load

* Field to Aggregate: Case ID [v]

Aggregate Function: Count [v]

Timeline Field: Date Reported [v]

Period: Last Quarter [v]

Rising Trend Color: [Blue] [v]

Flat Trend Color: [Blue] [v]

Falling Trend Color: [Blue] [v]

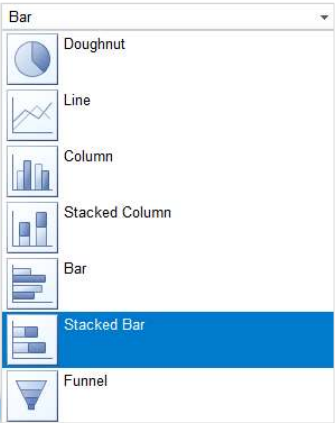
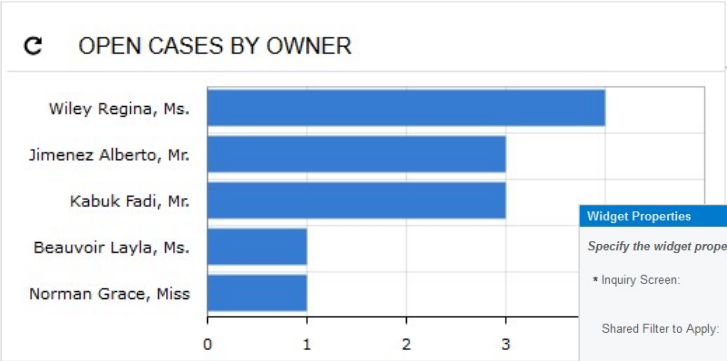
☐ Automatically Adjust Font Size

* Font Size: 10 [v]

Caption:

CANCEL FINISH

Dashboards - Chart



Widget Properties

Specify the widget properties

* Inquiry Screen: DB Cases

Shared Filter to Apply: Open Assigned

Caption: Open Cases by Owner

CANCEL

Chart Settings

* Chart Type: Bar

CATEGORIES

* Legend: Owner Name

Sort By: Legend Values Descending

Maximum Number of Values Shown: 5 ☒ Show Sum of Other Entries

SERIES

Legend:

Sort By: Legend Ascending

Maximum Number of Values Shown: 10 ☐ Show Sum of Other Entries

Color:

VALUES

* Value: Case ID Count

OK

Feedback

Help us improve this class by providing feedback:

<https://www.surveymonkey.com/r/onlineessions2018>

THANK YOU!