## General

Reporting provides users with tool to create view on system data. The benefit of reporting, compared to online views, is that you can include various data fields across the whole system.

### Video Tutorial: Designing New Report

Flash

### Video Tutorial: Grouping Report Results

Flash

## Reporting Features

Report is generated as XML definition for data querying. Each time the report is run, new query is sent to server, the query is placed into queue and the client side is waiting for the results to appear.

### Access Rights

It is possible to allow / disallow individual users or group of users to create new Report Definition or run the report using existing Report Definition.

### Fields

You can add as many fields into the report you want, you just should understand that not all combinations of fields may generate some results. For instance it is not possible or it has no sense to generate report, which contains events & messaging at the same time. Instead, you should create one report for messaging and another for events.

In order to display the filed in the report result, just tick the (x) in the column "**Show in result**" in Report definition.

Fields are displayed in Tree structure, in order to select appropriate fields, you have to expand any Reporting category, for instance Account (Folder), Contact, Form, Messaging, Project, ... After you expanded the category, you are allowed to select any field that will be displayed in report results.

You can sort order the fields (columns) in report results by pressing button "**Column order**". In the displayed pop-up you may arrange the column order.

### Filtering

The report definition may contain already pre-set filters in Report Definition. It is adviced to filter on criteria just to limit the results into the requested set of data, for instance Contact Foler Type = "Client" or Project Type = "Sales Opportunity", etc.

In order to enable / disable filtering based on selected criteria, just tick the (x) in the colum just in front of the field name. It is adviced not to check all fields this way, but just those that you desire to filter.

It is also possible to filter for any field displayed in report results, before you actually run the report generation.

### Sorting

It is possible to sort the report results by one selected field. If you want to order report results by more than one field, you should use Grouping feature.

In order to sort the report results by the selected field, select (x) in the Sort column.

### Grouping results

In order to group results by the selected criteria, just tick (x) the field under column Group by. You can set order of grouping and re-arrange it using Group By order (see button on top of report definition). You should select at least one aggregate function (**Count / Sum / Avg**) on any appropriate field that you want to count, sum or make average. Please note that Sum and Avg may be used only in connection with numeric fields.

#### Reporting Form values

Reporting allows you to include **Form Values** in report results. The only tricky part is that you need to define which **Form** is used for which reporting use. For instance, you used form "Client Form" as form set-up at Folder Type "Client". This way you should right-click on the form (displayed at left side of the Report Definition window) and select that it is "Subject Global Form".

See the table below illustrating how forms should be assigned to Report Definition, and how you should define them to be well understood by reporting.

| Form is defined for | The Report Definition terminology |
|---|---|
| Folder Type | Subject Global Form |
| Folder Template | Account Form |
| Project Type | Project Global Form |
| Project Template | Project Form |
| Activity Type | Activity Global Form |

Once you added the form into Report Definition, new fields (defined on form) should be added into the list of available fields. You are now able to filter on form fields, use them in report results, etc.

### Report Results Features

#### Access Rights

Each user will receive only those results that are enabled to the user. Therefore report results may differ based on who runs the predefined report.

#### Working with report results

You are allowed to work with data in report results. Once there is Contact Folder, Project, Activity/ Milestone, Message, Task or Event displayed, you should be able to open it's detail. There are several actions working on multiple records selection.

#### Exporting report results

You are allowed to export report results into CSV (Web client) or XLS (Win client) or print them (Win client).

#### Saving report results

If you want to keep the generated report results, you are allowed to store them (using Windows client only).

### Known Issues

Web client provides view on designed reports, but does not support 100% of all of them. You need to test the report results before you put the report into production. For instance some criteria can not be grouped under Web client interface yet. We are working on resolving these issues.

You can not filter on fields that are not displayed in report results.

You should not use Sum / Avg aggregate functions on non-numeric fields.

You should not combine fields in the same report result, which should not be combined.

You should not filter on criteria, based on which you group at the same time.

### Example

Combine reporting of Contact Folders, in connection with communication, tasks or time sheet.

### Create New Report

In order to create the report properly, some basic understanding of system data structure is required. You can create new report using MS Windows Administration interface.

Go to tab **Reports** > **Report selection** and press **New report**.

## Report Scenarios

Below mentioned examples / scenarios present only the most common reporting usage.

### Show Clients Overview

In new report, select at least reporting criteria **Account** and field **Name.** Press (x) in Show in results column at this criteria.

Because system may contain several Folder Types (including Client, Partner, Simple Folders, etc.), you should filter for criteria **Account** > **Type.** Double click into "**Filter value**" column in the same row and select the "Clients" Folder Type (or any appropriate).

Additional to these two required fields, you may add another criteria, for instance:

| Field Name | Description |
|---|---|
| Created from/to | Date the Client was created |
| Custom ID | Client reference number |
| Type | Folder Type |
| Status | Fixed status values (Initial, Active, Closed) |
| Custom Status | Any user-based status (Potential, Hot, VIP, Current, Lost, ...) |
| Path | Once the report is used for reporting folders, you can display the whole path to the folder. It may also be used once the client is created in multi-level organization structure, including branches of larger organizations. |

| | |
|---|---|
| Parent folder | Once the folder is stored within another folder in tree structure, it may contain the Parent folder |
| First contact date | The date of first communication with Client |
| Last contact date | The date of last communication with Client |
| Contact > Person > * | Is the Client person? If yes, you may use this category. |
| Contact > Company > * | Is the Client company? If yes, you may use this category. |
| Contact > Primary contacts > * | In any case you can use this category and show primary contact data, incl. primary e-mail, phone, mobile, address, etc. |
| Contact > Contact address > * | Show any address associated with the Client. In case there are more addresses, the report will generate more rows in report results. |
| Contact > Contact information > * | Show any Client's contact information (e-mail, phone, etc.). If there are more contacts found (several mail addresses), the report results will display new row for each of the contacts. |
| Contact > Bank > * | Show Client's bank account. |
| Contact > Valid from, Valid to, Keyword, Comment, Distribution group, Source database, Reference | Show additional Client contact details. |
| Subject Global Form > * | Once you assign the Form based on Folder Type = Client here, you will be able to include the Client's form values in the report results. |
| Form > * | Once you assign the Form based on Folder Template = Client here, you will be able to include the Client's form values in the report results. |
| Responsible team / user > * | Include these fields if you want to show Key Account for the Client. In case there are more responsible users for the same Client, the report results will show new row for each User and Client. In order to avoid this, you may filter only for Primary User. |

| | |
|---|---|
| Account state history > * | This is special reporting option allowing you to display history of Client status changes & user responsibility assignments. |

By including any of the above fields, you may generate simple Clients overview reports.

## Report Results Mass Actions

On report results, you can run several mass-account or mass-project actions. Just select records using either Ctrl+A or Ctrl + click or Ctril + click 1st & click last record. Right-click with mouse - wait & select one of the options. Please note that these functions sometimes require to have Folder Type or Project Type column in the report results. The process of displaying the pop-up menu may be very slow on larger record sets.

## Change Multiple Responsible Users