selenity

Reports Exercise Booklet

Testing your knowledge against the Selenity Expenses reporting suite

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Version	Date	Description	Author
1	01/10/2018	Initial version	Jennifer Bowman
1.1	21/11/2018	Addition of page numbers and minor formatting	Luke Redhead

Contents

Introduction

Training Booklet: Exercises

This training exercise booklet is intended to assist you with your Expenses User Reports training.

The booklet may be used during User Reports training, but will also allow you to learn or recap on the functionality of the user reports independently of the training session.

Throughout this exercise booklet you should substitute <Your Name> for your own first name when naming reports, etc.

Got stuck?

If you get stuck on an exercise, don't forget about our Knowledge site which is filled with lots of helpful articles and videos! You can find it here: http://expenses.knowledgeowl.com/help

Feedback

After you've reached the end of this booklet and have completed the exercises, we would love to hear from you! Please see page 73 for more information.

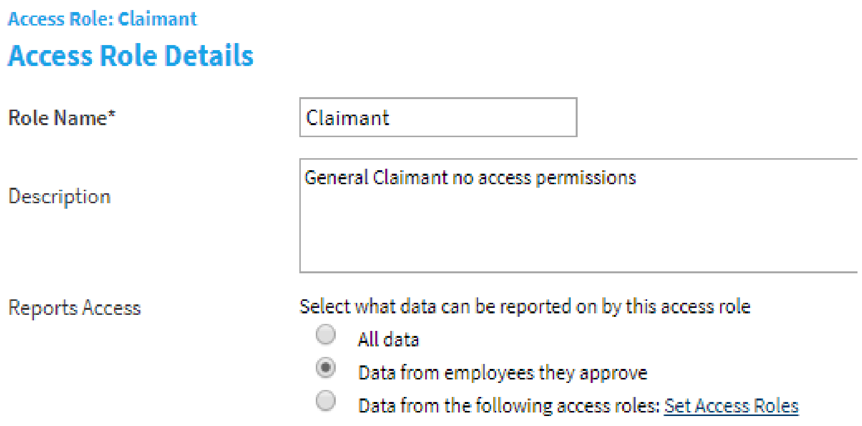
Security

Security within the Reporting Suite

It's important to take the correct steps to ensure that you are set up correctly within Selenity Expenses, to make sure only the relevant users have access to certain information.

Access Roles

From the Selenity Expenses Home Page, navigate **to Administrative Settings** > **User Management** > **Access Roles**. Edit the Access Role for the user, for example you may have a "Claimant" Access Role. You should see the screen below:



Scroll down to the Element Access list, until you see the **Reports** section. From here, you can tick or untick the boxes so that the user can View, Add, Edit or Delete Reports.

Reportable Fields

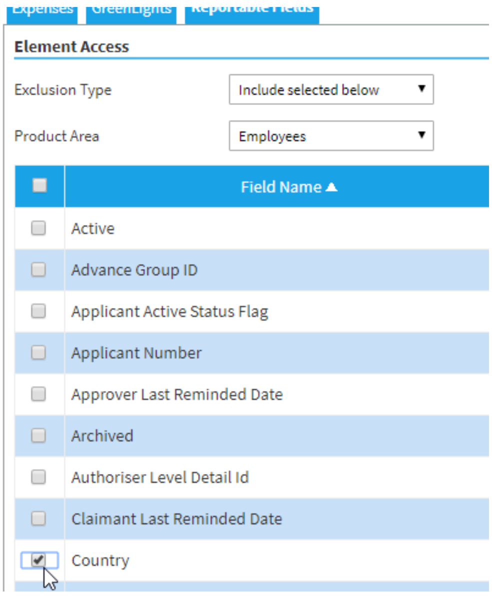
Scroll back up the page, and click on the **Reportable Fields** tab.

Within the Element Access section, you can choose from the following options:

Access role can see all data – the user will be able to see all fields and all data available within the Reporting Suite

Include/Exclude selected below – when you select one of these options, a new list will appear, Product Area. You can select many areas of the Selenity Expenses system such as Employees, Expense Items, Vehicles, etc. Within any of these you can either allow or prevent access to the fields for the user you are editing.

In the example below, I have chosen Include selected below, and selected the Employees Product Area. I have ticked the box next to Country. This means that the user will be able to report on the Employee’s Country, but anything I have left unticked (for example Active and Archived) will not show in any reports that the user runs.



This feature allows you more control over users running reports, and could for example prevent them from seeing other Employee’s details, such as addresses or bank details.

Report Categories

Exercise 1 – Personal Report Category

- Create a personal **Report Category** named <Your Name>'s Personal Reports.
- Save your new category
- Return to the User Reports page.

Q1: Who will be able to see your newly-created Report Category?

Q2: Who will be able to access reports that you subsequently place into this new Report Category?

Check out the answers on page 35

Exercise 2 – Global Report Category

- Create a global Report Category named <Your Name>'s Global Reports.
- Save your new Category.
- Return to the User Reports page.

Q1: Who will be able to see your newly-created global Report Category?

Q2: Who will be able to access reports that you subsequently place into this new Report Category?

Check out the answers on page 36

Creating Reports

Exercise 3 – Creating an Expenses Report

- In this exercise, you will create a new report named <Your Name>'s Expenses Report and ensure that only you have access to it.

Q1: How will you achieve this access restriction?

Your report will include the Username, Date of Expense, Expense Item, Reason and Total. Decide which you think is the best report base to use.

Q2: Which report base will be the best one to use and why?

Q3: How will you add the required columns?

Q4: How will you then ensure the correct column sequence?

Q5: Was the report created successfully and does it display as required?

Q6: Was your chosen report base the best one to use? If not, list a better alternative.

Q7: Who will be able to access your report and why?

Q8: Can you see both of your Report Categories on the Reports page now? Why?

Q9: Are all Report Categories visible?

Check out the answers on pages 37 & 38

Exercise 4 – Creating a Claims Report

- In this exercise, you will create a new report named <Your Name>'s Claims Report to show all of your claim details, but this time you should ensure that others can also have access to this report.

Q1: How will you achieve these access rights?

Your report will need to include the employee username, the claim ID, claim total. Decide which you think is the best report base to use.

Q2: Which report base will be the best one to use and why?

Q3: How will you add the required columns?

Q4: How will you then ensure the correct column sequence?

Q5: Was the report created successfully and does it display as required?

Q6: Who will have access to your Paid Claims report and why?

Q7: Can you see other Report Categories on the Reports page? Why is this?

Check out the answers on pages 39 & 40

Report Filtering

Exercise 5 – Creating an Employee Directory by Department Report

In this exercise, you will create a new report named <Your Name>'s Employee Directory to show employees, but only in certain Departments.

- You should also ensure that only you will have access to this report.

Q1: How will you achieve these access rights?

Your report will need to include Surname, First Name, Username, Department.
Decide which you think is the best report base to use.

Q2: Which report base will be the best one to use and why?

Q3: How will you add the required columns?

Q4: How will you then ensure the correct column sequence?

Add a report filter to show only employees in a particular Department.

Q5: Was the report created successfully and does it display as required?

Q6: Was your chosen report base the best one to use? If not, list a better alternative.

Q7: Who will have access to your Employee Directory report and why?

Q8: Can you see other Report Categories on the Reports page? Why is this?

Q9: How else might you refer to report filtering?

Check out the answers on pages 41, 42 & 43

Exercise 6 – Creating a Claim Reason Report.

In this exercise, you will create a new user report named <Your Name>'s Claim Reason Report with details of the Username, Expense Item, Date of Expense, Reason, and Total and only you should have access to the report once created.

Q1: How will you achieve the requested access restrictions?

Q2: What else would you need to do to ensure that all the required information is present in the report?

Q3: How will you ensure that the report displays the information in sequence order shown above?

Q4: Did you achieve the required report?

Q5: Who will be able to access your newly-created report and why?

Check out the answers on pages 44 & 45

Exercise 7 – Creating a Claims By Date Report

In this exercise, you will create a new user report named <Your Name>'s Claims By Date Report with details of the Username, Expense Item, Total, Date of Expense, etc and a filter for the date range. Only you should have access to the report once created.

Q1: How will you achieve the requested access restrictions?

Decide on the best report base to use.

Q2: How will you ensure that the report displays the information in sequence order shown above?

For this report, add a filter for the Date of Expense. Return to the User Reports page and run the report by clicking on the report name link.

Q3: Did you achieve the required report?

Q4: Is all the required information present in the report and in the requested column order?

Q5: Who will be able to access your newly-created report and why?

Check out the answers on page 46

Static Columns

Exercise 8 – Creating a Report with a Static Column

In this exercise you will create a new user report named <Your Name>'s Claims and Static Details.

- This time, the report should contain the Username, Expense Item, Total, Reason, etc. It should also include a static column called <Your Name>'s Static Column and showing the word "Example Text". Only you should have access to the report after it has been created.

Q1: How will you achieve the requested access restriction?

Q2: Which base will be the best one to use and why?

Q3: What else would you need to do to ensure that all the required columns are present in the report and displayed in the required sequence, as above?

The report should include a static column showing <Your Name>'s Static Column.

Q4: What details will you need to set up in order to display the requested static column?

Q5: What would happen if you were to tick “I’ll decide when I run the report”?

Return to the User Reports page and the run the report by clicking on the report name link.

Q6: Was the creation of your report successful and did it display as required?

Q7: Was your chosen report base the best one to use? If not, list a better alternative.

Q8: Who will be able to access your report and why?

Check out the answers on pages 47 & 48

Calculated Columns

Exercise 9 – Creating a Report with a Calculated Column

- Create a new report called <Your Name>'s Concatenation Report.
- The report should include the Username, Surname, First Name, Job Title and Email Address.
- You should also create a calculated column to show their Full Name.
- Only you should have access to the report when it has been created.

Q1: How will you achieve the requested access restriction?

Q2: Which is the best report base to use?

Add a Calculated Column to the report, called "Calculated Column".

Q3: What details will you need to set up in order to display this field?

Field Name

Available Fields

Logical Test

Return to the User Reports page and run the report by clicking on the report name link.

Q4: Was the report created successfully and did it display as required?

Q5: Was your chosen report base the best one to use? If not, list a better alternative.

Q6: Who will be able to access your report and why?

Check out the answers on pages 49 & 50

Editing a Report

Exercise 10 – Editing a Report and Hiding a Column

In this exercise, you will edit your existing report, called Concatenation Report which you created in Exercise 9.

Q1: How do you edit a report?

You need to amend a column within the report.

Q2: Which report tab should be chosen?

Q3: How do you hide the First Name and Surname columns so that the details will not be displayed on the report?

Q4: Why hide the columns rather than delete them from the report structure?

Save the amended report.
Return to the User Reports page and run the report by clicking on the report name link.

Q5: How is the report different from the original version?

Check out the answers on pages 51 & 52

Exercise 11 – Editing a Report and Sorting a Column

For this exercise, you will need to use the Claim Reason report you created in Exercise 6.

- This report will have no filtering criteria.
- Run your report and note the screen display. Once noted, close the report.
- Edit the report.

Q1: How do you edit a report?

You need to amend a column within the report.

Q2: Which report tab should you choose?

You need to amend the report so that it is sorted by the Reason and appears in ascending order.

Q3: How do you sort the Reason column?

Save the amended report and return to the User Reports page. Run the report by clicking on the report name link.

Q4: Is the report sorted correctly?

Q5: Has this improved the report in any way and if so, how?

Check out the answers on pages 53 & 54

Exercise 12 – Editing a Report and Grouping by a Column

You will need to use the Claims by date report, created in Exercise 6 and just amended in Exercise 11.

- Run the report and note the screen display. Once noted, close the report.
- Edit this report.

Q1: How do you edit a report?

You need to amend a column within the report.

Q2: Which report tab should you choose?

Amend the report so that it is permanently grouped by the Reason column.

Q3: How do you achieve a permanent grouping on the required column?

Q4: When applying a grouping, should the column also be sorted?

Save the amended report. Return to the User Reports page and run the report by clicking on the report name link.

Q5: How is it different from the original report?

Q6: Has the grouping improved the report and if so, how?

Q7: If a column is grouped, can a different column be sorted?

Q8: If a column is grouped, can a second column also be grouped?

Additional Exercise:

Using the same report, amend it further and apply additional groupings and column sorting.

Check out the answers on pages 55 & 56

Temporary Changes

Exercise 13 – Grouping and Sorting a Column at Runtime

The report used in this exercise will be the one you created in Exercise 7, Claims by Date.

- Run the existing report, noting the screen display.
- Drag the Reason column header up and over to the left and drop it where indicated between the red arrows.

Q1: Which permanent report option is this the temporary equivalent to?

Q2: Has the grouping been entirely successful, and why?

Click the X on the Reason grouping. The report should now be as originally run for this exercise.

Click the Username column header. Drag and drop it up and over to the left between the red arrows.

Q3: Does this re-group the report?

Q4: Has the grouping been entirely successful this time, and why?

Q5: What option must you also use to achieve a successful temporary grouping?

Q6: How many of the above changes affect the original report?

Check out the answers on page 57

Exercise 14 – Grouping by a Column using "Column Change"

The report used in this exercise is the Claims by Date report, created in Exercise 7.

- Run your existing report and note the screen display.
- To make the temporary change, click on the Change Columns option within the Page Options menu.

Q1: Which option is Change Columns equivalent to?

You should amend the report so that it is grouped by the Reason column and appears in alphabetical order.

Q2: When applying Group By, should the column also be sorted?

Q3: Are the original columns still present in the report?

Q4: If the information is truncated in columns, what can you do to improve the display?

Additional exercise:

Using the same report, try different groupings using the Change Columns option.

Check out the answers on page 58

Exercise 15 – Adding a New/Extra Column to the Report

Open someone else's global Report Category and choose any report, but not one of your own, ie where you are not the report owner.

Q1: Can this report be amended or deleted by you?

Q2: How is this shown on the screen (or not)?

Run the report that you have chosen and note the display.
With the report showing on your screen, click on the Change Report option within the Page Options section.
Choose a new field and add it to the report.

Q3: Where does the new field appear?

Q4: Move the new column to the penultimate position. How will you do this?

Q5: Could these changes have been made permanent? Describe how?

Check out the answers on page 59

Exercise 16 – Changing the Report Filter

Pick any report not in one of your own Report Categories (ie someone else's global Report Category).

Q1: Can this report be amended or deleted by you?

Q2: How is this shown on the screen (or not)?

Run the report that you have chosen and note the display.
With the report showing on your screen, click on the Change Filter option within the Page Options section.
Choose a new filter field and add it to the report.

Q3: What is the Change Filter option equivalent to?

Choose a new filter field and add it to the report, or add an additional filter if one already exists.

Q4: How will you achieve this?

Q5: When the amended report is run, how will it be different from the original report?

Q6: How does this affect the original report?

Q7: Could these changes have been made permanent and if so, how?

Check out the answers on pages 60 & 61

Sum, Average, Max and Min

Exercise 17 – Using Sum, Average, Max and Min

- Create a new report called <Your Name>'s Employee Expenses Item Report

This type of report, as with all the others you have worked with so far, is an **item report**.

Q1: What is the other type of report you can create?

- Only you should have access to the report.
- The report should contain Username, Claim ID and Total and the Total should be sorted in descending order.
- Save this report.
- Create a second report called <Your Name>'s Employee Expenses Summary Report.
- Again, only you should have access to this report.

Q2: How will you achieve this access restriction?

- It should contain Username, Claim ID and Total and the Total should be sorted in descending order.
- Sum the Total column. How would you do this?
  *This type of report is known as a **Summary Report**.*
- Save this report
- Run both reports and compare the differences.

Q3: What difference do you notice in particular?

Check out the answers on page 62

Export

Exercise 18 – Export Options

- Run the report you created in Exercise 18, <Your Name>'s Employee Expenses Item Report.
- When the report is displayed on screen, select Export Options from the Page Options menu.
- Ensure that, if you ever export the report to an Excel spreadsheet or to a CSV file, the report column headers will be included.

Q1: How will you achieve this?

Q2: Once selected, will the Export Options always apply to the export of this report?

Q3: If this was a global report, would the export options that you have set still apply to other users?

- Choose to export a footer report with the main report.
- Select your existing report called <Your Name>'s Employee Expenses Summary Report (also created in Exercise 18) as your preferred footer.
- Close the report.

Check out the answers on pages 63 & 64

Exercise 19 – Exporting a Report to an Excel Spreadsheet

Your existing report, <Your Name>'s Employee Expenses Item Report, will be used for this exercise.

- There are two separate ways to export a report to an Excel spreadsheet.

Q1: Describe both ways:

Q2: Describe when you would use each of them:

- Export the report to Excel.
- Save the file.
- Open the file.

Q3: Does the spreadsheet include the header, and why?

Q4: Does the spreadsheet reflect your <Your Name>'s Employee Expenses Item Report?

Q5: Is there any extra information present and if so, how has this been achieved?

- Close the spreadsheet.

Check out the answers on pages 65 & 66

Exercise 20 – Scheduling an Emailed Copy of the Report as a Spreadsheet

Your existing report, <Your Name>'s Expense Report will be used for this exercise. This was created in Exercise 3.

Q1: Describe a simple way of scheduling a report:

- Schedule your report to be received just once.
- Schedule the date for Today.
- Schedule the time for 5 minutes from the current time.
- Set the report to email you (or multiple email addresses) a copy of the report.
- Exit report scheduling.

Q2: Which new option appears on the Page Options menu?

- Select My Schedules from the Page Options menu and check that the report is correctly scheduled.
- Wait for the scheduled report time.

Q3: Did you receive an emailed Excel spreadsheet?

The arrival time may be the exact time scheduled or up to a maximum of 15 minutes beyond the scheduled time; this depends on when the scheduler is next due to run.

Q4: After you received your report, did the Page Options menu change and if so, why?

Q5: If you wanted to receive a copy of this report every Monday morning, how would you achieve this?

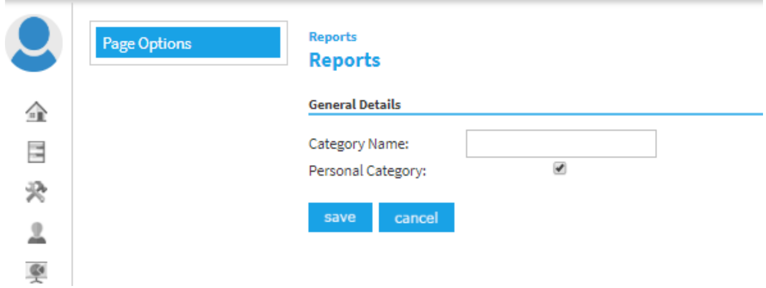
Q6: If you wanted to send a copy to someone else every Monday morning how would you achieve this?

Check out the answers on pages 67 & 68

ANSWERS

Exercise 1 – Personal Report Category

- Create a personal **Report Category** named <Your Name>'s Personal Reports.



- Save your new category
- Return to the User Reports page.

Q1: Who will be able to see your newly-created Report Category?

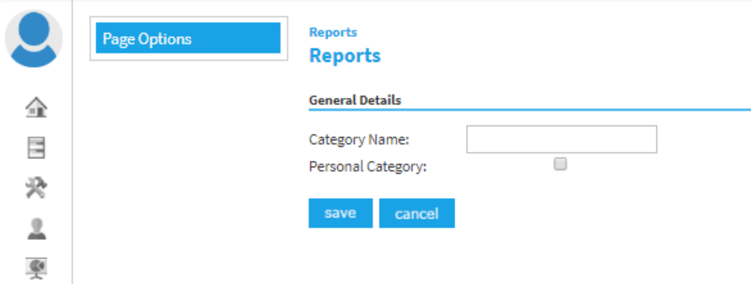
You and other users will be able to see the personal category.

Q2: Who will be able to access reports that you subsequently place into this new Report Category?

Only you. No other user will be able to see the reports you placed in this category.

Exercise 2 – Global Report Category

- Create a global Report Category named <Your Name>‘s Global Reports.



- Save your new Category.
- Return to the User Reports page.

Q1: Who will be able to see your newly-created global Report Category?

All users will be able to see the global report category.

Q2: Who will be able to access reports that you subsequently place into this new Report Category?

All users will have access to reports placed in a global category.

Q3: Why can you not see your newly-created Report Category on the Reports page immediately after creating it?

Blank – or empty – report categories are not displayed.

Exercise 3 – Creating an Expense Report

In this exercise, you will create a new report named <Your Name>'s Expense Report and ensure that only you have access to it.

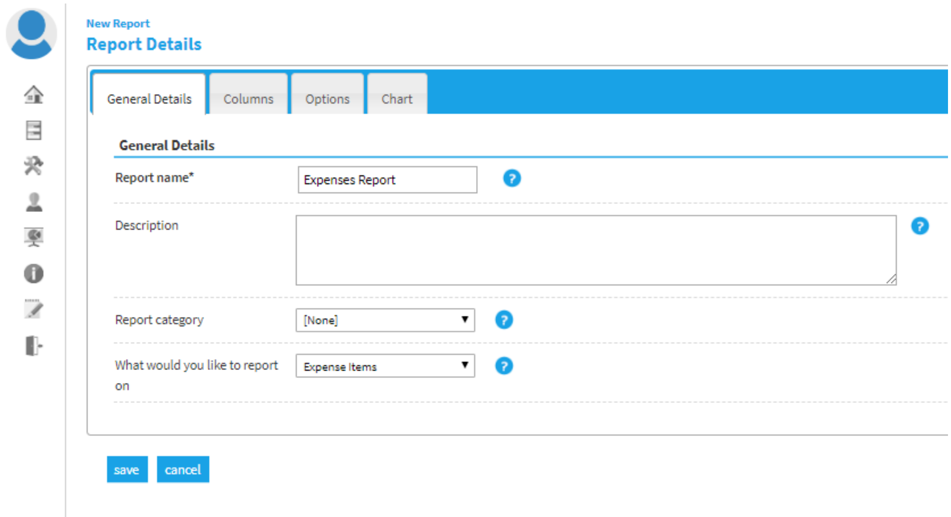
Q1: How will you achieve this access restriction?

You should put the report into your personal report category.

- Your report will include the Username, Date of Expense, Expense Item, Reason and Total.
- Decide which you think is the best report base to use.

Q2: Which report base will be the best one to use and why?

The fields required for this report relate solely to Selenity Expenses, so that should be selected.



Q3: How will you add the required columns?

Commonly-used fields are available at the top of the column selector list. You should click on the required field and drag it over onto the grid.

Q4: How will you then ensure the correct column sequence?

Click to select the name of the field to be moved and drag the field into the correct column to re-sequence it.

Drag a column header here to group by its column

Username	Date of Expense	Expense Item	Reason	Total
Jenny	19/06/2018	Refreshments for Meetings	Conference / Exhibition	£10.00
Jenny	26/06/2018	Hotel Outside London	Customer Meeting	£65.00
Jenny	26/06/2018	Evening Meal (demo)	Customer Meeting	£45.00
Jenny	19/07/2018	Bus Fare	External Meeting	£20.00
jenny_claimant	25/06/2018	Mileage - General (demo)	Staff Entertaining	£108.54
jenny_claimant	26/06/2018	Hotel Outside London	Customer Training	£65.00
jenny_claimant	26/06/2018	Drinks	Customer Training	£10.00
jenny_claimant	26/06/2018	Evening Meal (demo)	Customer Training	£15.00
jenny_claimant	01/07/2018	Drinks	Customer Meeting	£25.00
jenny_claimant	01/07/2018	Client Entertaining (demo)	Customer Meeting	£44.00

- In stage 4, save the report, return to the User reports page and run your report by clicking on the report name link.

Q5: Was the report created successfully and does it display as required?

If you have followed the steps shown above, then your report should have been successful and displayed correctly.

If it has not, investigate and state why:

Q6: Was your chosen report base the best one to use? If not, list a better alternative.

As the fields needed all relate to expenses this was the best one to use but you could also have chosen to access Expense Items, etc.

Q7: Who will be able to access your report and why?

As this report is in your Personal category, only you can access it.

Q8: Can you see both of your Report Categories on the Reports page now? Why?

You should be able to see both the Personal and Global categories. This is because although the Personal one can only be accessed by you, you can still see it listed within the Report Categories.

Q9: Are all Report Categories visible?

All Categories are visible, however the reports within them won't be if the Report Category is a Personal one for another user.

Exercise 4 – Creating a Claims Report

In this exercise, you will create a new report named <Your Name>'s Claims Report to show all your employee details, but this time you should ensure that others can also have access to this report.

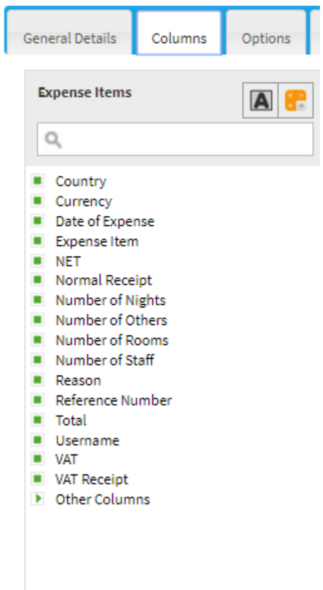
Q1: How will you achieve these access rights?

You must put the report in a global report category.

- Your report will need to include the employee username, the claim ID, and claim total.
- Decide which you think is the best report base to use.

Q2: Which report base will be the best one to use and why?

The fields for this report can be found in the Claim folder, under Other Columns. For that reason, it is best to use Claims.

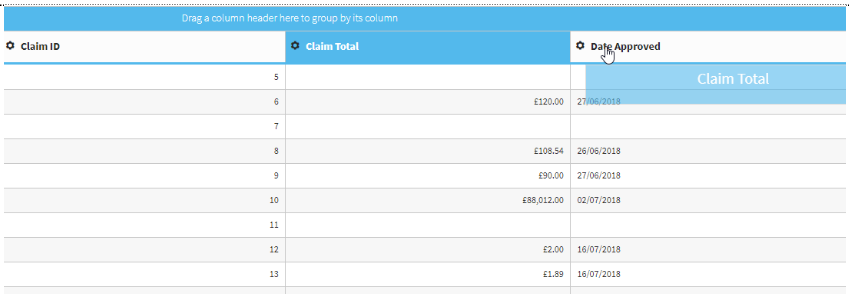


Q3: How will you add the required columns?

By clicking the required field and dragging it onto the grid.

Q4: How will you then ensure the correct column sequence?

Click to select the name of the field to be moved and drag the field into the correct column to re-sequence it.



- During stage 4 of the Report Wizard, save the report.

Q5: Was the report created successfully and does it display as required?

If you have followed the above steps shown above, then your report should have successful and displayed correctly. If this is not the case, investigate and enter the reason:

Q6: Who will have access to your Approved Claims report and why?

All users will be able to access and run your report as you placed it in the global category.

Q7: Can you see other Report Categories on the Reports page? Why is this?

You should be able to see other report categories. This is due to other users adding their own reports to their global categories.

Exercise 5 – Creating an Employee Directory by Department Report

In this exercise, you will create a new report named <Your Name>’s Employee Directory to show employees, but only in certain Departments.

- You should also ensure that only you will have access to this report.

Q1: How will you achieve these access rights?

You should place the report in a Personal report category.

Drag a column heade

Surname	First Name	Username
Claimant	Test	test.claimant
Admin	jb report admin	report.admin
Admin	Admin	Admin15
Admin	Admin	Admin14
admin	admin	Admin16
Admin	Admin	Admin00
Admin	Admin	Admin01
Admin	Admin	Admin02
Admin	Admin	Admin03
Admin	Admin	Admin04

- Your report will need to include Surname, First Name, Username, Department.
- Decide which you think is the best report base to use.

Q2: Which report base will be the best one to use and why?

The most suitable category is Employees.

Q3: How will you add the required columns?

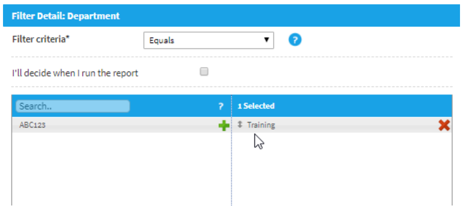
By dragging the fields from the Column Selector onto the grid.

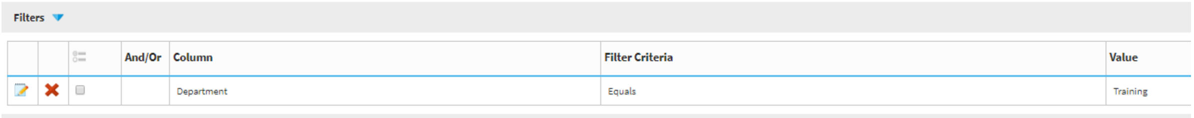
Q4: How will you then ensure the correct column sequence?

Click to select the name of the field to be moved and drag the field into the correct column to re-sequence it.

Add a report filter to show only employees in the Training Department.

Tick the required Departments:





- During stage 4 of the Report Wizard, save the report.

Q5: Was the report created successfully and does it display as required?

If you have followed the steps shown, your report should be correctly displayed.

Q6: Was your chosen report base the best one to use? If not, list a better alternative.

You could have started with Expenses Items, then Other Columns and Employees.

Q7: Who will have access to your Employee Directory report and why?

Only you will have access to this report as it is in your Personal report category.

Q8: Can you see both of your Report Categories on the Reports page now? Why?

You should be able to see both categories. This is because there are now reports in both your Personal and Global categories.

Q9: Can you see other Report Categories on the Reports page? Why is this?

Where others have created global report categories, you will be able to see these also.

Q10: How else might you refer to report filtering?

You could think of report filtering as 'conditions'. The data displayed in your report has had to satisfy the condition(s) you set in the filtering stage.

Exercise 6 – Creating a Claim Reason Report

In this exercise, you will create a new user report named <Your Name>’s Claim Reason Report with details of the Username, Expense Item, Date of Expense, Reason, Total and only you should have access to the report once created.

Q1: How will you achieve the requested access restrictions?

By putting the report into your Personal Report Category.

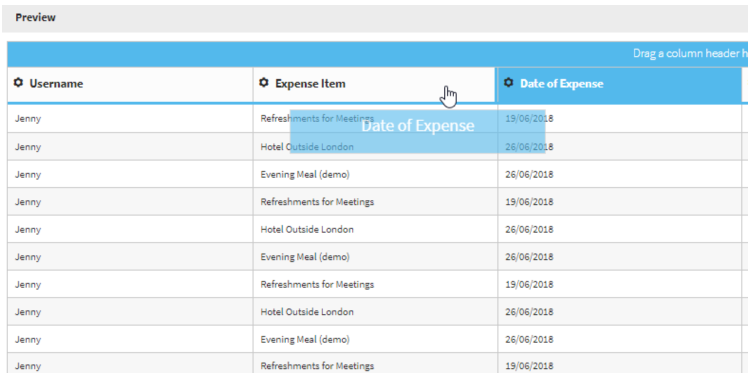
- Decide on the best report base to use.

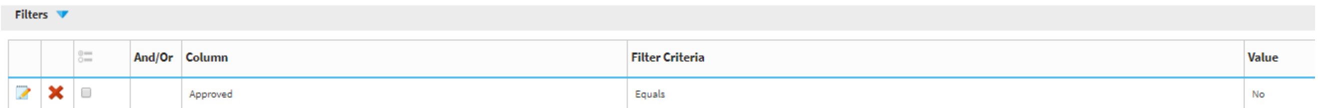
Q2: What else would you need to do to ensure that all the required information is present in the report?

You can drag and drop any additional fields onto the grid.

Q3: How will you ensure that the report displays the information in sequence order shown above?

Click to select the name of the field to be moved and drag the field into the correct column to re-sequence it.





- During stage 4 of the Report Wizard, save the report.

Q4: Did you achieve the required report?

If you followed the above steps correctly, your report should be correctly displayed. If not, investigate and list the reason:

Q5: Who will be able to access your newly-created report and why?

Only you will have access to this report because you placed it into your Personal report category.

Exercise 7 – Creating a Claims By Date Report

In this exercise, you will create a new user report named <Your Name>'s Claims By Date Report with details of the Username, Expense Item, Total, Date of Expense, etc and a filter for the date range. Only you should have access to the report once created.

Q1: How will you achieve the requested access restrictions?

By placing the report into your Personal report category.

- Decide on the best report base to use.

Q2: What else would you need to do to ensure that all the required information is present in the report?

Drag and drop any additional fields from the Column Selector onto the grid.

Q3: How will you ensure that the report displays the information in sequence order shown above?

Click to select the name of the field to be moved and drag the field into the correct column to re-sequence it.

- For this report, add a filter for the Date of Expense.
- During stage 4 of the Report Wizard, save the report.
- Return to the User Reports page and run the report by clicking on the report name link.

			And/Or	Column	Filter Criteria	Value
				Date Approved	After	I'll decide when I run the report

Q4: Did you achieve the required report?

If you have followed the steps shown, your report should be correctly displayed. If not, investigate and list the reason:

Q5: Who will be able to access your newly-created report and why?

Only you will be able to access and run your report because you placed it into your Personal report category.

Exercise 8 – Creating a Report with a Static Column

In this exercise you will create a new user report named <Your Name>'s Claims and Static Details.

- This time, the report should contain the Username, Expense Item, Total, Reason, etc. It should also include a static column called <Your Name>'s Static Column and showing the word "Invoice", which could then be exported to your financial system. Only you should have access to the report after it has been created.

Q1: How will you achieve the requested access restriction?

You should place the report into your Personal report category.

Q2: Which base will be the best one to use and why?

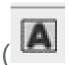
Expense Items would be the best place to start so you can access other columns.

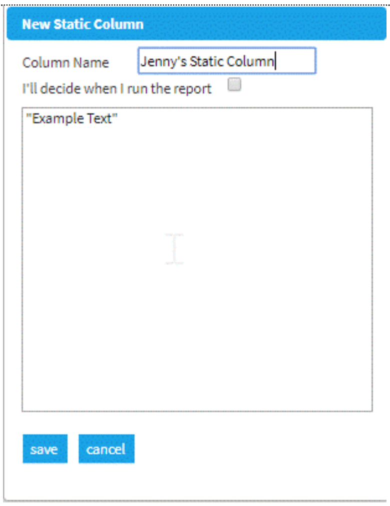
Q3: What else would you need to do to ensure that all the required columns are present in the report and displayed in the required sequence, as above?

Click to select the name of the field to be moved and drag the field into the correct column to re-sequence it.

- The report should include a static column showing <Your Name>'s Static Column.

Q4: What details will you need to set up in order to display the requested static column?

You will need to click on the Static column symbol (), set up the Column Name and type in the text/numbers you wish to add. You can tick or untick the "I'll decide when I run the report" tickbox.



Q5: What would happen if you were to tick “I’ll decide when I run the report”?

If you tick I’ll decide when I run the report, you may enter the text that you wish to appear in the static column at the time the report is run.

This means that the text may appear differently for each report run, according to the text entered at runtime.

- During stage 4 of the Report Wizard, save the report.
- Return to the User Reports page and the run the report by clicking on the report name link.

Q6: Was the creation of your report successful and did it display as required?

If you have followed the steps correctly, your report should be correctly displayed. If it has not been successful, investigate and give the reason:

Q7: Was your chosen report base the best one to use? If not, list a better alternative.

Expense Items is probably the best base.

Q8: Who will be able to access your report and why?

Only you will be able to access your report because you put it into your Personal report category.

Exercise 9 – Creating a Report with a Calculated Column

- Create a new report called <Your Name>'s Concatenation Report.
- The report should include the Username, Surname, First Name, Job Title and Email Address.
- You should also create a calculated column to show their Full Name.
- Only you should have access to the report when it has been created.

Q1: How will you achieve the requested access restriction?

You should place the report into your Personal report category.

Q2: Which is the best report base to use?

Employees would be the best base to use as it contains the fields required.

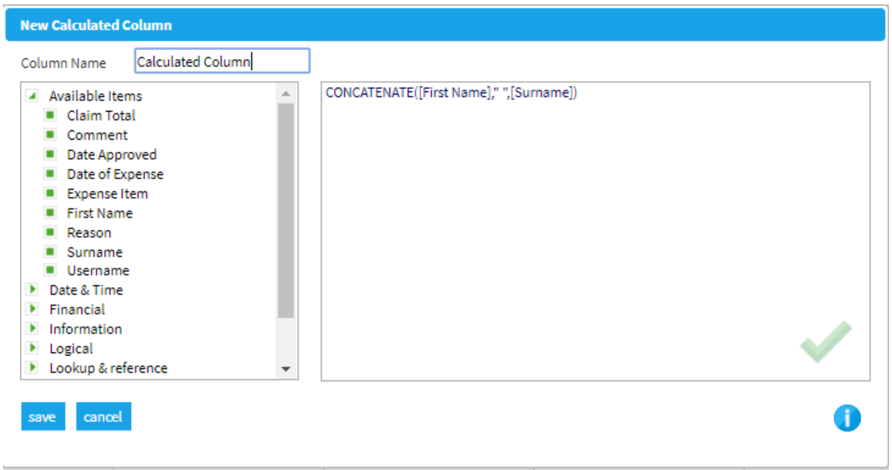
- Add a Calculated Column to the report, called "Calculated Column".

Q3: What details will you need to set up in order to display this field?

Column Name — Full Name

Available Columns — [First Name] and {Surname}

Logical Test — CONCATENATE([First_Name]," ",[Surname])



- During stage 4 of the Report Wizard, save the report.
- Return to the User Reports page and run the report by clicking on the report name link.

Q4: Was the report created successfully and did it display as required?

If you have followed the steps shown, your report should be successful and show the calculated field correctly. If not, investigate and give the reason:

Q5: Was your chosen report base the best one to use? If not, list a better alternative.

If you selected Employees, it should be the best one to use.

Q6: Who will be able to access your report and why?

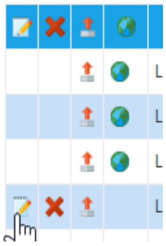
Only you will have access to this report because you placed it in your Personal report category.

Exercise 10 – Editing a Report and Hiding a Column

In this exercise, you will edit your existing report, called Concatenation Report which you created in Exercise 9.

Q1: How do you edit a report?

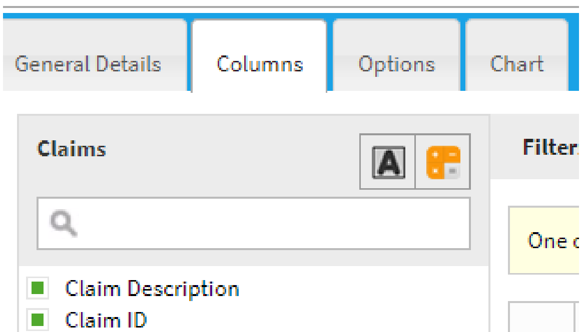
Click on the Notepad & Pencil icon against the report you wish to edit.



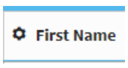
- You need to amend a column within the report.

Q2: Which report tab should be chosen?

As the detail we wish to change involves a column change, choose the Columns tab.



Q3: How do you hide the First Name and Surname columns so that the details will not be displayed on the report?

To hide a column, click on the Cog symbol 

on the required column/s, and click Hide.

Q4: Why hide the columns rather than delete them from the report structure?

The information in these columns is needed for the calculated fields but does not need to be displayed. Therefore, whilst the data needs to be present for the calculation to work, it is not necessary for it to be visible.

- Save the amended report.
- Return to the User Reports page and run the report by clicking on the report name link.

Q5: How is the report different from the original version?

The report is the same as the original except that the two Name fields are no longer visible, but the Full Name field is displayed. Note that Full Name field still works correctly despite the Name fields not being displayed.

Exercise 11 – Editing a Report and Sorting a Column

For this exercise, you will need to use the Claim Reason report you created in Exercise 6.

- This report will have no filtering criteria.
- Run your report and note the screen display. Once noted, close the report.
- Edit the report.

Q1: How do you edit a report?

Click on the Notepad & Pencil icon against the report to be edited.

- You need to amend a column within the report.

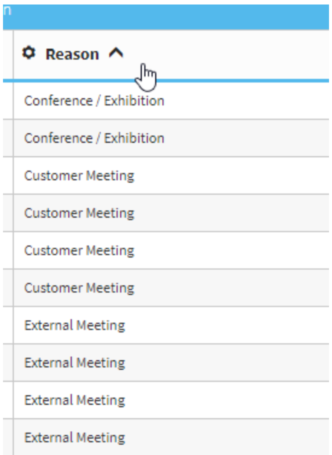
Q2: Which report tab should you choose?

As the required change involves a column, the Report Columns tab should be chosen.

- You need to amend the report so that it is sorted by the Current Stage and appears in ascending order.

Q3: How do you sort the Current Stage column?

Against the Reason field, click the column header and it will sort in ascending order.



- Save the amended report and return to the User Reports page. Run the report by clicking on the report name link.

Q4: Is the report sorted correctly?

If the Reason column was sorted in ascending order, the report should be correctly sorted.

Q5: Has this improved the report in any way and if so, how?

Irrespective of the purpose of the report, it has been improved by bringing some order to its construction. When creating reports, you should always give some consideration to sorting – it may improve the readability, for example, which is useful if it is a global report and being used by others.

Exercise 12 – Editing a Report and Grouping by a Column

You will need to use the Claims By Date report, created in Exercise 7 and just amended in Exercise 11.

- Run the report and note the screen display. Once noted, close the report.
- Edit this report.

Q1: How do you edit a report?

Click on the Notepad & Pencil icon against the appropriate report.

- You need to amend a column within the report.

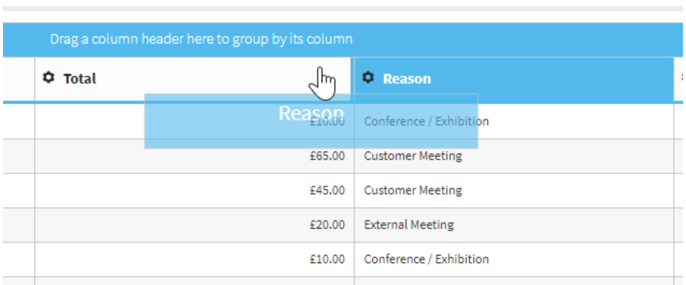
Q2: Which report tab should you choose?

As you need to make a change to a column, you should choose the Report Columns tab.

- Amend the report so that it is permanently grouped by the Reason column.

Q3: How do you achieve a permanent grouping on the required column?

You should click, drag and drop the required column up to the blue bar above the column headers.



Q4: When applying a grouping, should the column also be sorted?

If you apply a permanent grouping, ie, one which will be in place without user intervention, the sorting is applied automatically, in ascending order.

- Save the amended report. Return to the User Reports page and run the report by clicking on the report name link.

Q5: How is it different from the original report?

The report layout should now be completely different from the original.

Q6: Has the grouping improved the report and if so, how?

Irrespective of the purpose of the report, it has been improved by bringing some order to its construction. When creating reports, you should always give some consideration to grouping – it may improve the readability, for example, which is useful if it is a global report and being used by others.

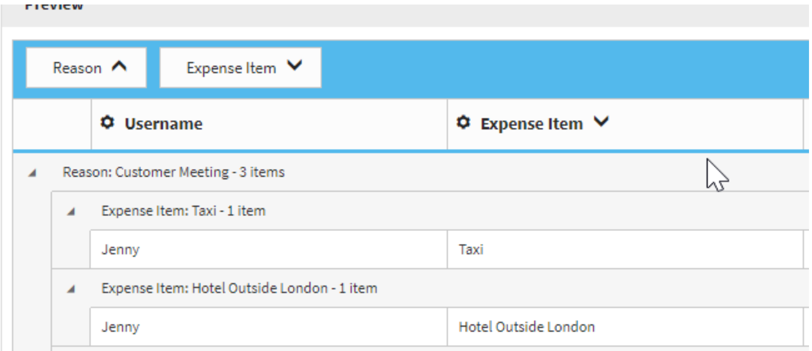
Q7: If a column is grouped, can a different column be sorted?

Yes. If one column is grouped, then another column may be sorted so that when the report is run, a ^ symbol will be visible and you can click on this to adjust the sorting on any of the columns.

Q8: If a column is grouped, can a second column also be grouped?

Yes. You can group as many columns as necessary in order to achieve the required report.

Note that with any number of columns grouped, a further column could also be sorted so that when a particular grouped category is opened, the details within that group will be displayed in a sorted order.

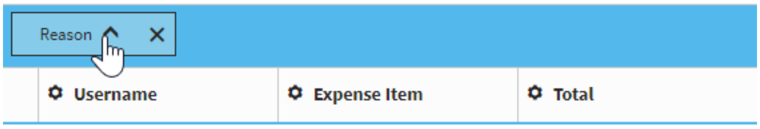


- Additional Exercise:
  Using the same report, amend it further and apply additional groupings and column sorting.

Exercise 13 – Grouping and Sorting a Column at Runtime

The report used in this exercise will be the one you created in Exercise 7, Claims by Date.

- Run the existing report, noting the screen display.
- Drag the Reason column header up and onto the blue bar



Q1: Which permanent report option is this the temporary equivalent to?

This is the temporary equivalent of the permanent Group By option.

Q2: Has the grouping been entirely successful, and why?

Yes, it works just as if you had made the permanent change to the report.

- Click the X on the Reason grouping. 

- Click the Username column header. Drag and drop it on the blue bar to group it.

Q3: Does this re-group the report?

Yes. It groups the report on the Username field.

Q4: Has the grouping been entirely successful this time, and why?

Yes, this should work as if you had made the permanent change to the report.

Q5: What option must you also use to achieve a successful temporary grouping?

You must first sort the column to be grouped temporarily.

Q6: How many of the above changes affect the original report?

None. The original report is still saved in its original format.

The changes applied in this exercise are temporary.

If you run the report again, you would need to make the same temporary changes as before to view the same layout. Otherwise, the report retains the same layout as specified when it was originally created.

Exercise 14 – Grouping by a Column using “Column Change”

The report used in this exercise is the Claims by Date report, created in Exercise 7.

- Run your existing report and note the screen display.
- To make the temporary change, click on the Change Columns option within the Page Options menu.

Q1: Which option is Change Report equivalent to?

This is the temporary equivalent to making permanent changes on the Report Columns tab.

- You should amend the report so that it is grouped by the Reason column and appears in alphabetical order.

Q2: When applying Group By, should the column also be sorted?

When applying a grouping using this method (as opposed to drag-and-drop of a heading), then an ascending sort is automatically applied.

Q5: Are the original columns still present in the report?

Yes.

Q6: If the information is truncated in columns, what can you do to improve the display?

You can click on the right-hand column separator to drag and resize the columns.

- Additional exercise:

Using the same report, try different groupings using the Change Columns option.

Exercise 15 – Adding a New/Extra Column to the Report

Open someone else's global Report Category and choose any report, but not one of your own, ie where you are not the report owner.

Q1: Can this report be amended or deleted by you?

No. A report can only be amended or deleted by the report owner.

Q2: How is this shown on the screen (or not)?

If you are able to edit the report – because you are the report owner – you will see the Notepad & Pencil icon against the report name.

- Run the report that you have chosen and note the display.
- With the report showing on your screen, click on the Change Column option within the Page Options section.
- Choose a new field and add it to the report.

Q3: Where does the new field appear?

The new field appears at the bottom of the column list in the Report Columns screen.

Q4: Move the new column to the penultimate position. How will you do this?

Click to select the name of the field to be moved and drag the field into the correct column to re-sequence it.

Q5: Could these changes have been made permanent? Describe how?

No, not by you. You are not the report owner so you can only make temporary changes when the report is run.

However, you can run the report, save it as a template and make changes to it – you will be the owner of the template.

Exercise 16 – Changing the Report Filter

Pick any report not in one of your own Report Categories (ie someone else's global Report Category).

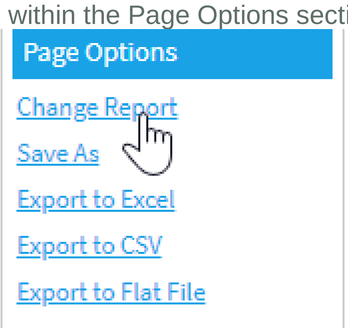
Q1: Can this report be amended or deleted by you?

No. A report can only be amended or deleted by its owner.

Q2: How is this shown on the screen (or not)?

If you are able to edit a report – because you are the owner – you will see the Notepad & Pencil icon against the report name.

- Run the report that you have chosen and note the display.
- With the report showing on your screen, click on the Change Report button option within the Page Options section.



- Choose a new filter field and add it to the report.

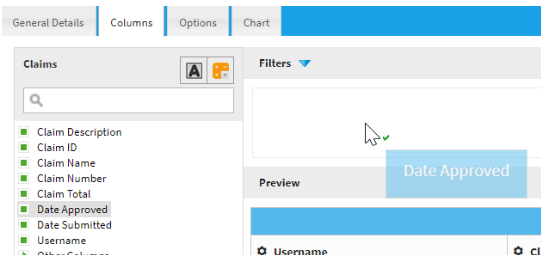
Q3: What is the Change Filter option equivalent to?

This is the temporary equivalent to making a permanent change using the Report Filter tab.

- Choose a new filter field and add it to the report, or add an additional filter if one already exists.

Q4: How will you achieve this?

Select a new field from the Column Selector area and drag it onto the filter grid.



Q5: When the amended report is run, how will it be different from the original report?

The report format will be the same as the original but the data displayed will be restricted to that which matches the filter you set.

Q6: How does this affect the original report?

It has no effect on the original report as this is only a temporary change.

Q7: Could these changes have been made permanent and if so, how?

No. You can not make these changes permanent as you are not the owner of the report. However, you could run the report, save it as a template and then make the changes permanent. The report would be a copy but you would be the owner.

- Run the report that you have chosen and note the screen display.

Exercise 17 – Using Sum, Average, Max and Min

- Create a new report called <Your Name>'s Employee Expenses Item Report
- This type of report, as with all the others you have worked with so far, is an **item report**.

Q1: What is the other type of report you can create?

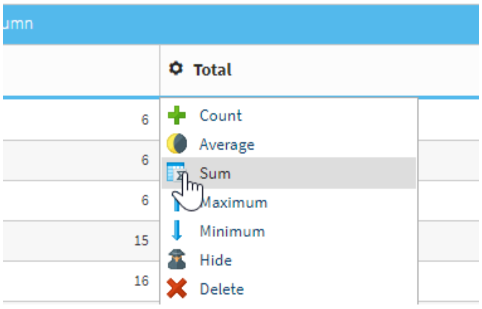
You could also create a Summary report.

- Only you should have access to the report.
- The report should contain Username, Claim ID and Total and the Total should be sorted in descending order.
- Save this report.
- Create a second report called <Your Name>'s Employee Expenses Summary Report.
- Again, only you should have access to this report.

Q2: How will you achieve this access restriction?

By placing the report in your Personal report category.

- It should contain Username, Claim ID and Total and the Total should be sorted in descending order.
- Add a Sum to the Total column by clicking on the cog icon on the Total column, and clicking Sum



- This type of report is known as a **Summary Report**.
  Save this report.
- Run both reports and compare the differences.

Q3: What difference do you notice in particular?

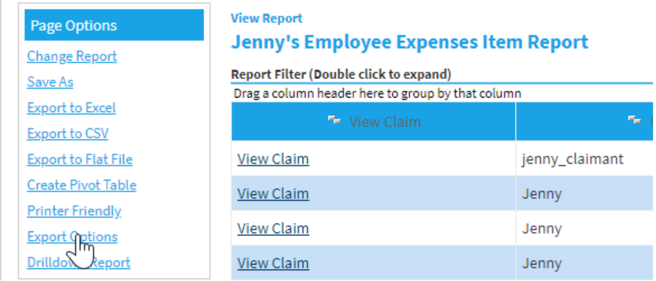
The first report, ie the one without the Sum, etc, shows all items.

The second report, however, shows a summary of the items.

Exercise 18 – Export Options

Run the report you created in Exercise 18, <Your Name>'s Employee Expenses Item Report.

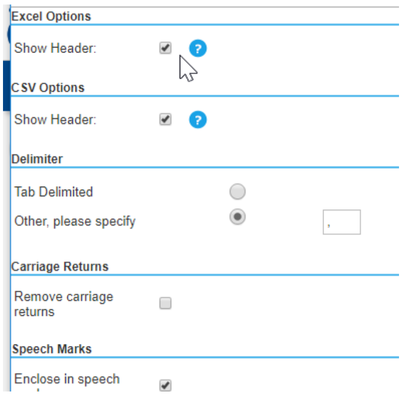
- When the report is displayed on screen, select Export Options from the Page Options menu.



- Ensure that, if you ever export the report to an Excel spreadsheet or to a CSV file, the report column headers will be included.

Q1: How will you achieve this?

Select Export Options from the Page Options menu. Tick the Show Header box against the Excel options.



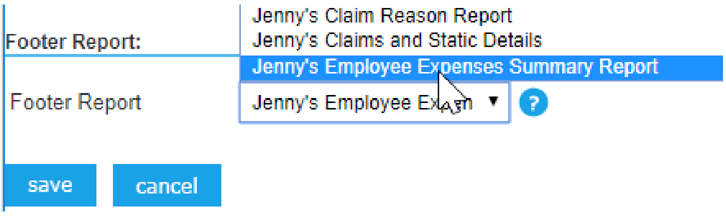
Q2: Once selected, will the Export Options always apply to the export of this report?

Yes. Each time this report is exported, the headers will be included.

Q3: If this was a global report, would the export options that you have set still apply to other users?

No. The Export Options you set are your own and do not apply generally to the report.

- Choose to export a footer report with the main report.
- Select your existing report called <Your Name>'s Employee Expenses Summary Report (also created in Exercise 18) as your preferred footer.



- Close the report.

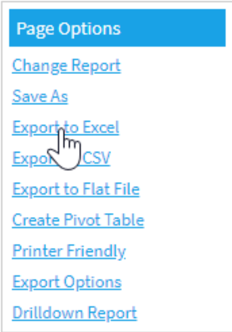
Exercise 19 – Exporting a Report to an Excel Spreadsheet

Your existing report, <Your Name>'s Employee Expenses Item Report, will be used for this exercise.

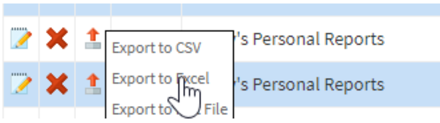
- There are two separate ways to export a report to an Excel spreadsheet.

Q1: Describe both ways:

1. Run the report and select Export to Excel option from the Page Options menu.



2. From the User Reports page, click the Excel link against the report name.



Q2: Describe when you would use each of them:

1. This method must be used where the user does not own the report but wishes to set their own Export Options. It can be used by any user, including the report owner.

2. This method may be used by the report owner or any user who is running a global report that they do NOT own.

This method should be used by the owner of the report once Export Options have been set as it negates the need to run the report before exporting it.

- Export the report to Excel.
- Save the file.
- Open the file.

Q3: Does the spreadsheet include the header, and why?

Yes, because the Show Header option was ticked in the Export Options screen.

Q4: Does the spreadsheet reflect your <Your Name>'s Employee Expenses Item Report?

Yes. It contains all the same data as the report.

Q5: Is there any extra information present and if so, how has this been achieved?

Yes, there is now a summary at the foot of the detail lines. This has come from the summary report that was included as the Report Footer in the Export Options box.

- Close the spreadsheet.

Exercise 20 – Scheduling an Emailed Copy of the Report as a Spreadsheet

Your existing report, <Your Name>'s Expense Report will be used for this exercise. This was created in Exercise 3.

Q1: Describe a simple way of scheduling a report:

From the User Reports screen, click the Schedule link against the required report.

- Schedule your report to be received just once.
- Schedule the date for Today.
- Schedule the time for 5 minutes from the current time.
- Set the report to email you (or multiple email addresses) a copy of the report.
- Exit report scheduling.

Q2: Which new option appears on the Page Options menu?

My Schedules appears as a new link in the Page Options menu.

- Select My Schedules from the Page Options menu and check that the report is correctly scheduled.
- Wait for the scheduled report time.

Q3: Did you receive an emailed Excel spreadsheet?

If you followed the steps shown, you should receive an email containing the report.

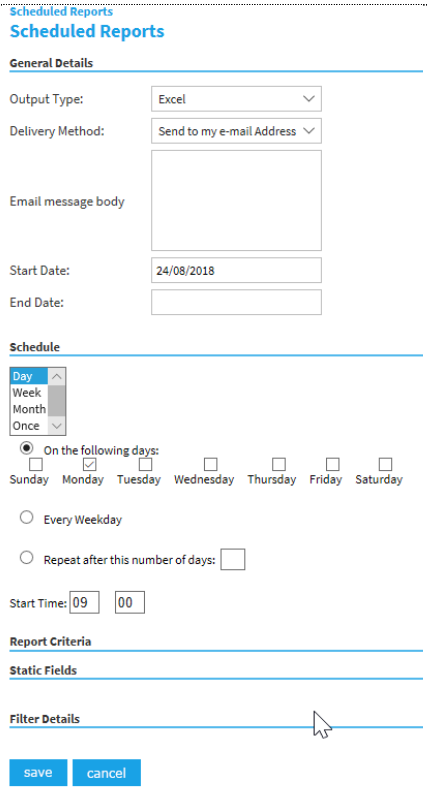
Note that the arrival time may be the exact time scheduled or may actually be up to a maximum of 15 minutes beyond the scheduled time; this depends on when the scheduler is next due to run.

Q4: After you received your report, did the Page Options menu change and if so, why?

The report was only scheduled to run once. Therefore once it had been sent, the link was no longer valid as there were no more schedules.

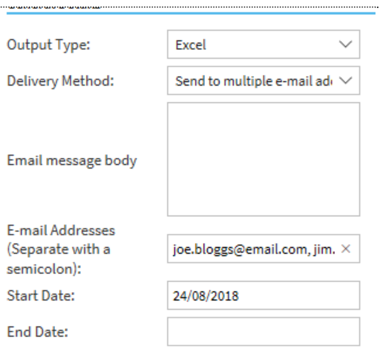
Q5: If you wanted to receive a copy of this report every Monday morning, how would you achieve this?

By scheduling the report to run weekly on a Monday morning.



Q6: If you wanted to send a copy to someone else every Monday morning how would you achieve this?

Change the Delivery Method to ‘Send to Multiple E-Mail Addresses’ and enter the email address of the intended recipient.



We hope that you've found this Reports Training Booklet useful and now feel confident to start creating and editing reports!

Share Your Feedback

Happy reporting!

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