

A nighttime cityscape with a network overlay of white lines and nodes connecting various points across the scene.

OneVizion

Vizion Platform[®] Reports and Dashboards

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Agenda

- Reports
- Running Reports
- Configuring Reports
- Dashboards
- Materialized Views
- Post Processor Commands

A nighttime cityscape with a network overlay of white lines and nodes connecting various points across the scene. The city lights are visible in the background.

OneVizion

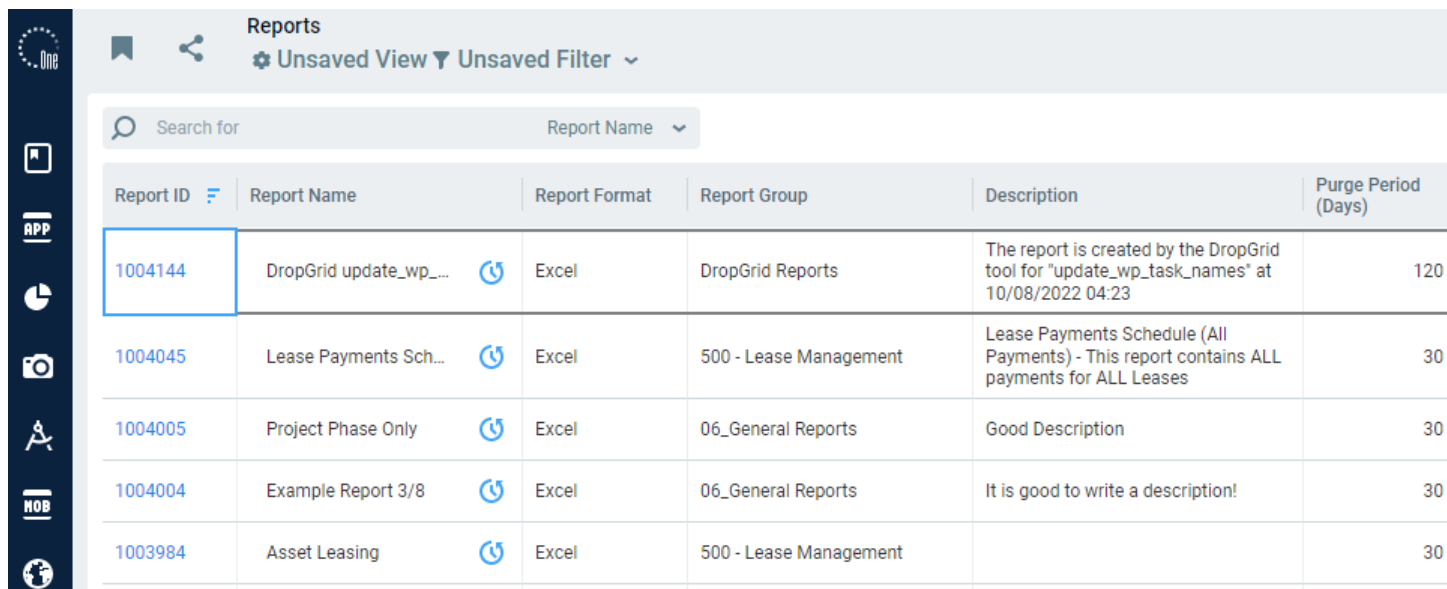
Reports

Reports

The Vizion Platform® uses specialized software that allows manipulation of data for a report without needing to print the data before the report is created. Users may create a Report Manually or use the Report Wizard function.

Follow the steps below to properly set up a report.

1. Add the Report to the Vizion Platform database
2. Configure the Report Pattern Blocks (SQL statements)
3. Configure the Report Parameters



The screenshot displays the 'Reports' section of the Vizion Platform. It features a search bar at the top with the text 'Search for' and a dropdown menu for 'Report Name'. Below the search bar is a table listing various reports. The table has columns for Report ID, Report Name, Report Format, Report Group, Description, and Purge Period (Days). The first row is highlighted with a blue border.

Report ID	Report Name	Report Format	Report Group	Description	Purge Period (Days)
1004144	DropGrid update_wp_...	Excel	DropGrid Reports	The report is created by the DropGrid tool for "update_wp_task_names" at 10/08/2022 04:23	120
1004045	Lease Payments Sch...	Excel	500 - Lease Management	Lease Payments Schedule (All Payments) - This report contains ALL payments for ALL Leases	30
1004005	Project Phase Only	Excel	06_General Reports	Good Description	30
1004004	Example Report 3/8	Excel	06_General Reports	It is good to write a description!	30
1003984	Asset Leasing	Excel	500 - Lease Management		30

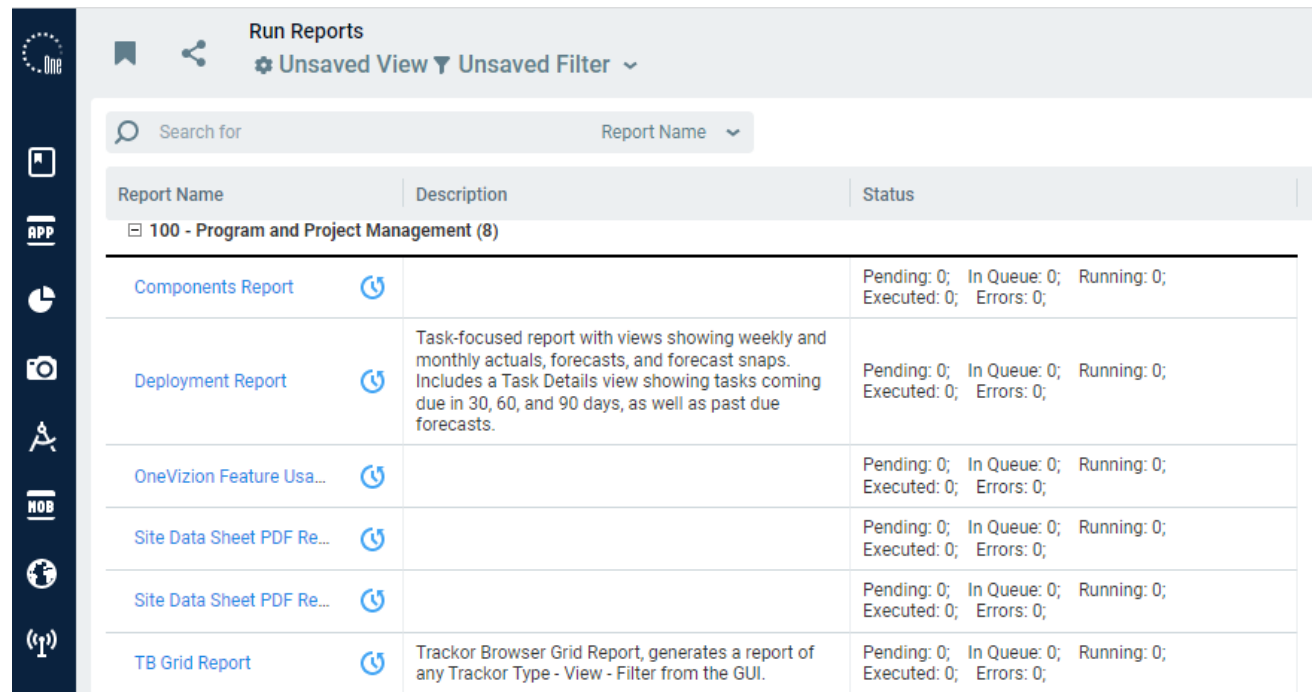
Running Reports

Users can run reports from the "Run Reports" page.

Report deliveries include E-File, Email, Email with Link, File, SFTP the File.

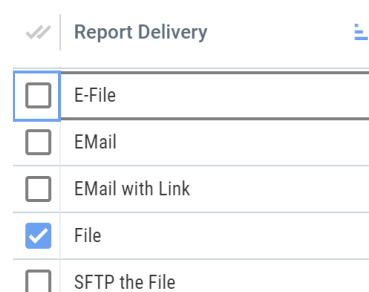
Report types include CSV, Excel, Excel sheet screenshot, Excel with VBA submit, Word, and PDF.

Note: Only reports assigned to the user are available.



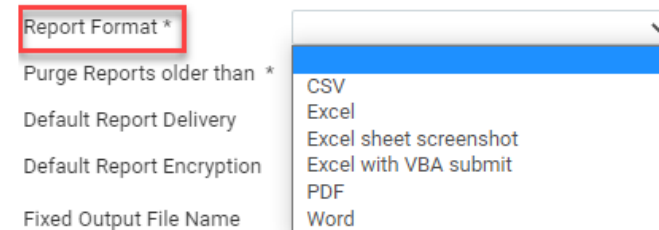
The screenshot shows the 'Run Reports' page with a search bar and a table of reports. The table has columns for Report Name, Description, and Status. A filter is applied for '100 - Program and Project Management (8)'.

Report Name	Description	Status
100 - Program and Project Management (8)		
Components Report		Pending: 0; In Queue: 0; Running: 0; Executed: 0; Errors: 0;
Deployment Report	Task-focused report with views showing weekly and monthly actuals, forecasts, and forecast snaps. Includes a Task Details view showing tasks coming due in 30, 60, and 90 days, as well as past due forecasts.	Pending: 0; In Queue: 0; Running: 0; Executed: 0; Errors: 0;
OneVizion Feature Usa...		Pending: 0; In Queue: 0; Running: 0; Executed: 0; Errors: 0;
Site Data Sheet PDF Re...		Pending: 0; In Queue: 0; Running: 0; Executed: 0; Errors: 0;
Site Data Sheet PDF Re...		Pending: 0; In Queue: 0; Running: 0; Executed: 0; Errors: 0;
TB Grid Report	Tracker Browser Grid Report, generates a report of any Tracker Type - View - Filter from the GUI.	Pending: 0; In Queue: 0; Running: 0; Executed: 0; Errors: 0;



The 'Report Delivery' section shows a list of delivery methods with checkboxes. The 'File' option is selected.

Report Delivery
<input type="checkbox"/> E-File
<input type="checkbox"/> EMail
<input type="checkbox"/> EMail with Link
<input checked="" type="checkbox"/> File
<input type="checkbox"/> SFTP the File



The 'Report Format' dropdown menu is open, showing a list of report formats. The 'File' option is selected.

Report Format *

- Purge Reports older than *
- Default Report Delivery
- Default Report Encryption
- Fixed Output File Name

Report Format *

- CSV
- Excel
- Excel sheet screenshot
- Excel with VBA submit
- PDF
- Word

Running Reports

To run a Report, click the hyperlinked Report Name in the Report Application Grid. Depending on the selected Report, the Run Report Applet may have up to four different sections with corresponding fields.

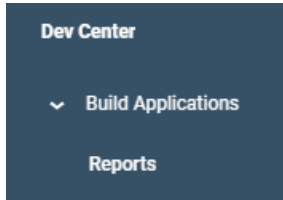
Reports can be configured with one or more parameters. These can behave as filters to the report data.

Reports can be run immediately or be scheduled to run in the future. They can also be scheduled to run repeatedly using the "Refresh" selection.

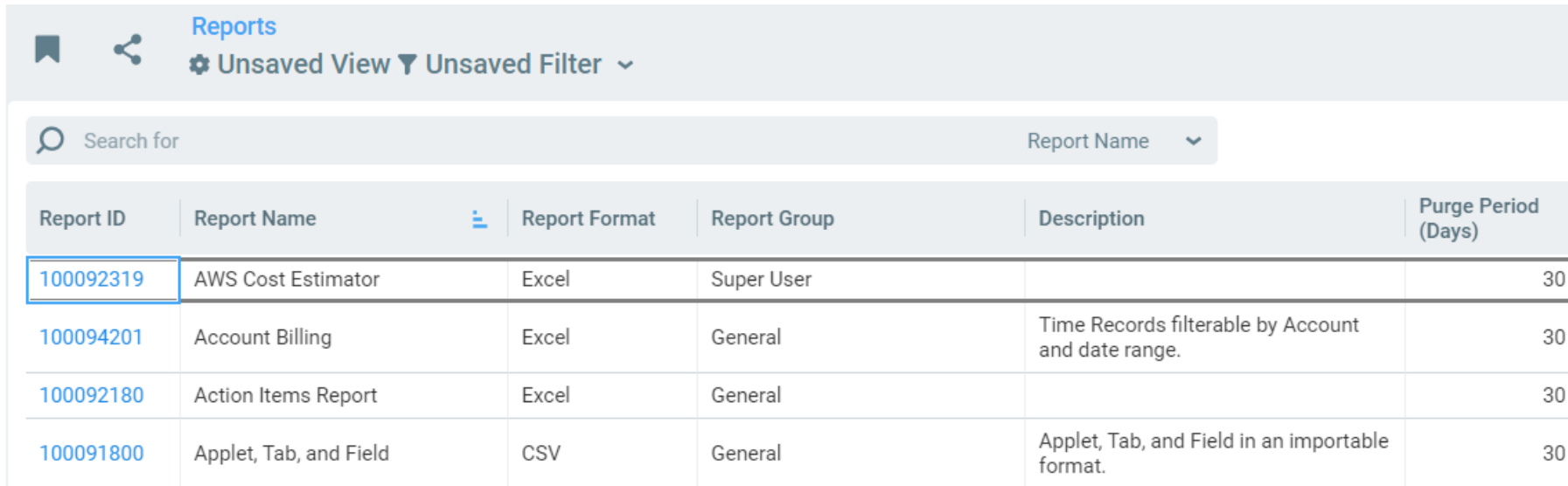
The screenshot displays the 'Run Reports' interface. On the left, a grid lists reports under three categories: '100 - Program and Project Management (8)', '130 - Cost Forecast Manager', and '140 - Vendors, Contacts, and Cr...'. The 'Site Data Sheet PDF Re...' report is highlighted with a red box. A red arrow points from this report to the 'General' tab in the configuration panel on the right. The configuration panel includes sections for 'Saved Parameters', 'Parameters' (with a 'Candidate ID *' field), 'Special Report Monitoring' (with 'Max Runtime (Minutes)' and 'Notification Email' fields), and 'Schedule' (with 'Run Now' selected, 'Refresh' set to 'Run Once', 'Delivery *' set to 'File; E-File', and 'File Name Header *' set to 'Site Data Sheet PDF Report' with 'Timestamp' checked).

Configuring Reports

Reports are configured on the "Reports" page. This page is in the Dev Center -> Build Applications menu.



An example of a created Report's purpose would be to give a count of Reports currently on the server that have been run since a specified date. It would also provide the username of the last three people who have run those Reports. A company might use this Report to determine which Reports are still in use and use that information to archive the old Reports.

A screenshot of a web application interface for managing reports. At the top, there's a header with 'Reports' in blue, a bookmark icon, a share icon, and 'Unsaved View' and 'Unsaved Filter' with a dropdown arrow. Below the header is a search bar with a magnifying glass icon and the text 'Search for'. To the right of the search bar is a dropdown menu labeled 'Report Name'. Below the search bar is a table with the following columns: Report ID, Report Name, Report Format, Report Group, Description, and Purge Period (Days). The table contains four rows of report data.

Report ID	Report Name	Report Format	Report Group	Description	Purge Period (Days)
100092319	AWS Cost Estimator	Excel	Super User		30
100094201	Account Billing	Excel	General	Time Records filterable by Account and date range.	30
100092180	Action Items Report	Excel	General		30
100091800	Applet, Tab, and Field	CSV	General	Applet, Tab, and Field in an importable format.	30

Configuring Reports

The "General Info" tab has several of the main configuration points for reports.

Users will generally see the same values, no matter the report type, but some sections may be added for particular types.

The screenshot shows a web-based configuration interface for reports. On the left is a sidebar with a search bar and a list of tabs: "General Info" (selected), "Excel Fields", "Pattern Blocks", "Parameters", "Role Privs", "Components Package" (with a count of 0), and "Components Audit Log". The main area is titled "Administer Reports - Report File ID: 1001822 - General Info" and contains the following fields:

- Process Scheduler * (Dropdown): Default
- Report Name * (Text): Config Field Usage
- Report Group * (Dropdown): Administrative Reports
- Report Delivery * (Text): File
- Execution Time Window (Server Time) (Two dropdowns): [] - []
- Max Runtime (Minutes) (Text): [] minutes
- Excel Template * (Text): Config Field Usage.xlsx
- Report Description (Text): Search usages of config fields in reports and rules
- Report Format * (Dropdown): Excel
- Purge Reports older than * (Dropdown): 30 Days
- Default Report Delivery (Text): []
- Fixed Output File Name (Text): []
- Excel Template Mode * (Dropdown): One Worksheet

At the bottom right, there are three buttons: "OK", "Cancel", and "Apply". A help icon (?) is located at the bottom left of the main area.

Configuring Reports

Parameters allow the user to filter the data used in the report.

The data supplied for the parameters when running a report can be used to modify the queries that the report executes.

The Roles Privs tab is used to assign specific Security Roles to the Report.

The Components Audit Log contains a listing of changes made to the Report.

The screenshot displays two panels from the OneVizion Admin interface. The top panel, titled "Administer Reports - Report File ID: 1004005 - Parameters", shows a configuration form for a parameter named "param1". The form includes fields for "Parameter" (param1) and "Displayed Text" (P:Project Status). It also features dropdown menus for "Data Type" (Number) and "Case" (Normal), radio buttons for "Default Value" (selected) and "Default System Value", and checkboxes for "Internal Param" (checked), "Use in Wizard" (checked), "Required Param", and "Only One Parent". A "Lookup" section at the bottom allows for field selection, with "ID" chosen for the lookup field name and "VAL" for the display field name. The bottom panel, titled "Administer Reports - Report File ID: 1004045 - Role Privs", shows a table of role privileges. The table has columns for "Role Name" and "Privileges" (Read, Edit, Add, Delete, None). The "Administrator" and "Administrator Junior" roles have "Read" and "Edit" privileges checked, while other roles have none.

Role Name	Privileges				
	Read	Edit	Add	Delete	None
Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Administrator Junior	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Checklist Tracker - MOBILE ONLY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General - READ ONLY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General User - Market Restriction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General User - Vendor Restriction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Configuring Reports (CSV)

← Search 🔍

- General Info**
- CSV Sql
- CSV Columns
- Parameters
- Role Privs
- Components Package 0
- Components Audit Log

Administer Reports - Report File ID: 1003709 - General Info

Process Scheduler *

Report Name * Report Format *

Report Group * Purge Reports older than * Days

Report Delivery * ... Default Report Delivery ...

Execution Time Window (Server Time) -

Max Runtime (Minutes) minutes

Fixed Output File Name

Report Description

CSV Settings

Quotes * Line End *

Exclude Header

E-File Delivery Settings

Field ...

Field Name	Description
Quotes*	Contains Rules for when to include or not include quotes. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"><ul style="list-style-type: none">Around EverythingAround NonEmpty ValuesNoneWhen Necessary</div>
Line End*	Contains Windows or Unix as line ends.
Exclude Header	When checked, we will exclude the header from the Report.

For more detailed information on building a CSV Report refer to the [Online Documentation](#).

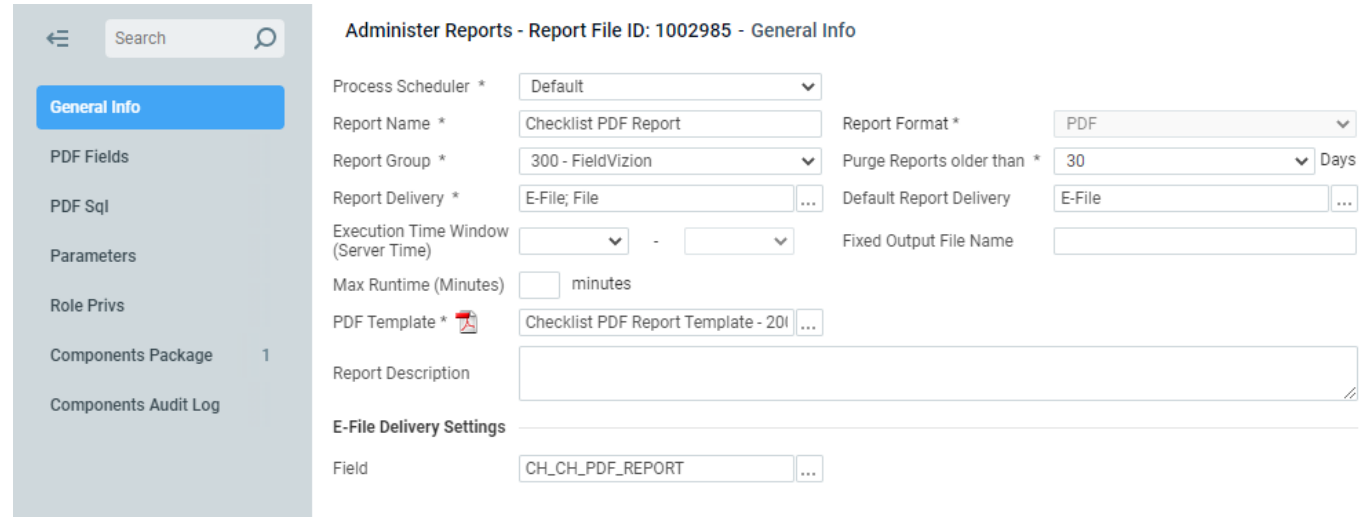
Configuring Reports (PDF)

PDF Template* - Contains the template used by the Report. Click the Ellipsis icon to choose a file from a local computer as the template. The file type selected must be a PDF (.pdf file extension).

The PDF Fields tab allows users to specify some PDF field-specific parameters.

Note: Since the PDF Fields tab uses the data which is created in the PDF SQL tab, it may be a good idea to read the PDF SQL Tab section in the online documentation.

For more detailed information on building a CSV Report refer to the [Online Documentation](#).



Administer Reports - Report File ID: 1002985 - General Info

Process Scheduler *

Report Name * Report Format *

Report Group * Purge Reports older than * Days

Report Delivery * ... Default Report Delivery ...

Execution Time Window (Server Time) -

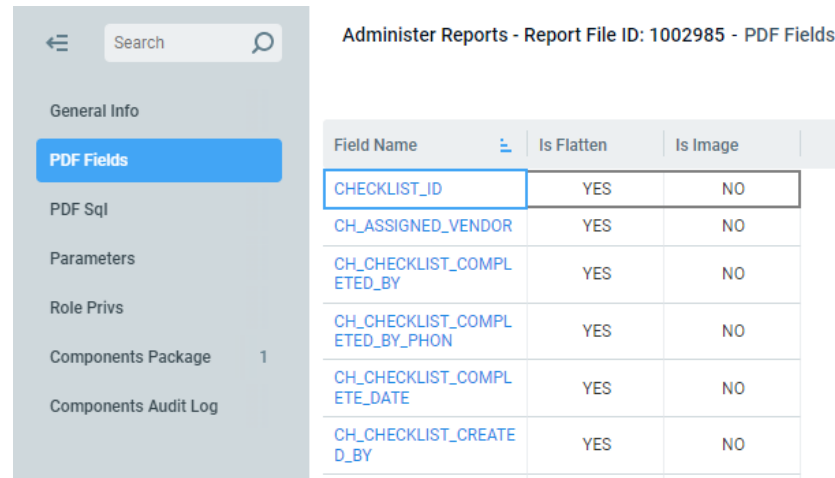
Max Runtime (Minutes) minutes

PDF Template * ...

Report Description

E-File Delivery Settings

Field ...



Administer Reports - Report File ID: 1002985 - PDF Fields

Field Name	Is Flatten	Is Image
CHECKLIST_ID	YES	NO
CH_ASSIGNED_VENDOR	YES	NO
CH_CHECKLIST_COMPLETED_BY	YES	NO
CH_CHECKLIST_COMPLETED_BY_PHON	YES	NO
CH_CHECKLIST_COMPLETE_DATE	YES	NO
CH_CHECKLIST_CREATED_BY	YES	NO

Configuring Reports (Excel with VBA)

When the Excel with VBA Submit is selected, the Support Async Submit checkbox will also appear. The VBA submit modifies the excel template so that users may change data in the excel report, click the Submit Report Data Icon. Then the changes to the excel file will be also saves in the OneVizion platform.

Note: Usage Log will have an entry ExcelSubmit to log all excel data submits.

For more detailed information on building an Excel with VBA report refer to the [Online Documentation](#).

The screenshot displays the 'Administer Reports - Report File ID: 1003408 - General Info' configuration page. On the left is a navigation sidebar with options: General Info (selected), Excel Fields, Pattern Blocks, Parameters, Role Privs, Components Package (1), and Components Audit Log. The main content area includes the following settings:

- Process Scheduler: Default
- Report Name: TB Grid with Submit
- Report Group: 100 - Program and Project Manager
- Report Delivery: EMail; Email with Link; File
- Execution Time Window (Server Time): [] - []
- Max Runtime (Minutes): [] minutes
- Excel Template: TB_Grid_Submit.xltm
- Support Async Submit:
- Report Description: Tracker Browser Grid Report with Submit, generates a report of any Tracker Type - View - Filter from the GUI that allows user to submit any changes.
- Email Settings:
 - Subject: []
 - Body: []
- Report Format: Excel with VBA submit
- Purge Reports older than: 30 Days
- Default Report Delivery: Email with Link
- Fixed Output File Name: []
- Excel Template Mode: One Worksheet

Configuring Reports (Word Reports)

Users may create a Report using the Word Report Format. When Word as the Report Format is selected, the Word Template field will appear.

Word Template*: Contains the template used by the Report. Click the ellipsis to choose a file from a local computer as the template. The file type selected must be a Word.

Word CleanUp Options: Allows you to remove empty paragraphs, empty table rows from the report result file, if it was added when the report was generated but was not in the template.

Save as PDF: Administrators can save the word report as a .pdf file.

For more detailed information on building a Word Report report refer to the [Online Documentation](#).

The screenshot displays the configuration interface for a report. On the left is a sidebar with navigation options: General Info (selected), Word Image Fields, Word Sql, Parameters, Role Privs, Components Package (0), and Components Audit Log. The main content area is titled 'Administer Reports - Report File ID: 1003564 - General Info'. It contains several sections: 'Process Scheduler' with a dropdown set to 'Default'; 'Report Name' set to 'Multi E-File Photo Word Report'; 'Report Group' set to '300 - FieldVizion'; 'Report Delivery' set to 'E-File; File'; 'Execution Time Window (Server Time)' with two empty dropdowns; 'Max Runtime (Minutes)' with an input field and the label 'minutes'; 'Word Template' with a file selection button and 'Template.docx' displayed; 'Report Description' with an empty text area; 'Word CleanUp Options' with checkboxes for 'Remove empty paragraphs' (checked), 'Remove empty table rows' (checked), and 'Save as PDF' (unchecked); and 'E-File Delivery Settings' with a 'Field' dropdown set to 'CHI_MULTIFILE_PHOTO_REPORT...'.

Post Processor Commands

OneVizion reports have the ability to run a post-processing script after the report has executed.

There are two columns in the table REPORT_FILES (POST_PROCESSOR_CMD and POST_PROCESSOR_REP_EXT) that control what command is run and what the processed file's extension is.

The _CMD can be any command that is executable on the reporting server.

One example of a use for this is to turn a single Excel file into a generated Visio instead.

Report Wizard

Users may create a report manually or utilize Views and Filters to create reports automatically using the Report Wizard feature on the Administer Reports page.

The Wizard then writes the SQL for the Report. The OneVizion Report Wizard users step through the Report Creation process, enabling users to quickly and easily select a Tracker Type, data fields, and parameters for a new Report.

Both Excel and CSV reports are supported with this feature.

For more detailed information on using the Report Wizard refer to the [Online Documentation](#).

The screenshot shows the 'Administer Reports - Report File ID: 1003408 - General Info' configuration page. On the left is a sidebar with a search bar and a list of menu items: 'General Info' (highlighted in blue), 'Excel Fields', 'Pattern Blocks', 'Parameters', 'Role Privs', 'Components Package 1', and 'Components Audit Log'. The main content area is divided into sections: 'General Info' with fields for Process Scheduler (Default), Report Name (TB Grid with Submit), Report Group (100 - Program and Project Manager), Report Delivery (Email; Email with Link; File), Execution Time Window (Server Time), Max Runtime (Minutes), Excel Template (TB_Grid_Submit.xltm), Support Async Submit (checkbox), Report Format (Excel with VBA submit), Purge Reports older than (30 Days), Default Report Delivery (Email with Link), Fixed Output File Name, and Excel Template Mode (One Worksheet). Below this is the 'Report Description' field containing the text: 'Tracker Browser Grid Report with Submit, generates a report of any Tracker Type - View - Filter from the GUI that allows user to submit any changes.' The 'Email Settings' section includes fields for 'Subject' and 'Body'.

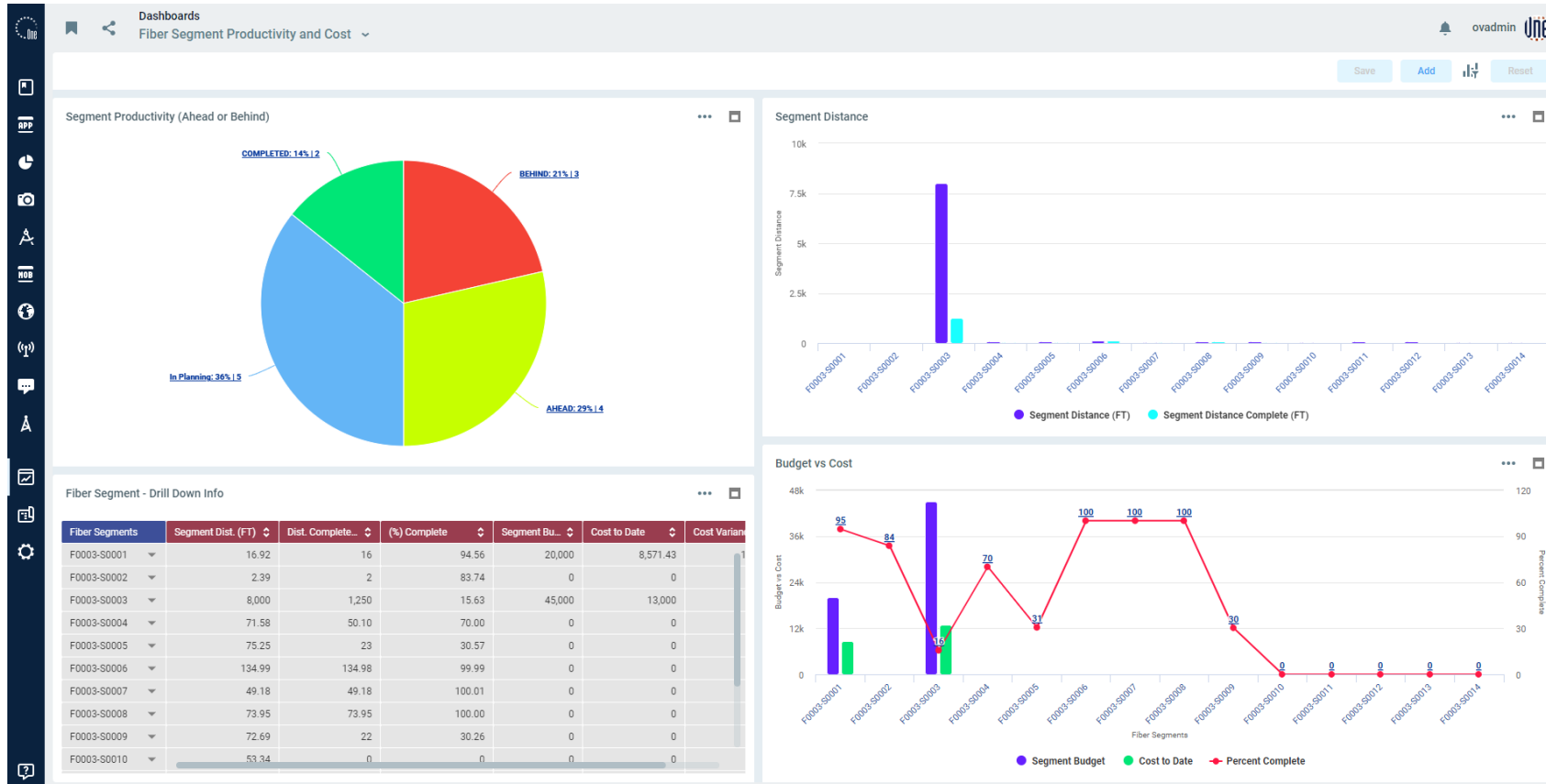
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Dashboards

Dashboards

Instead of generating a static file, users can use our Dashboard capability for reporting. Dashboards are built with single Datasource SQL and accompanying dashlets (charts and grids).

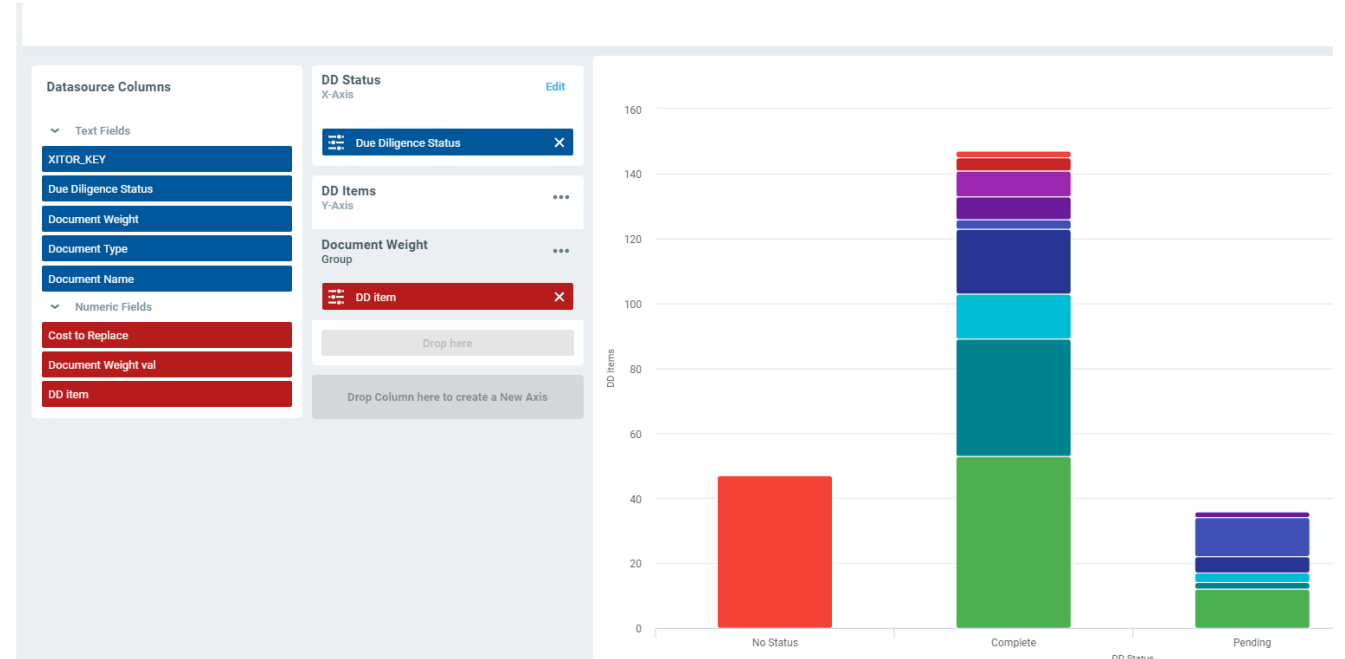


For more detailed information on using the Report Wizard refer to the [Online Documentation](#).

Dashboards (Report Generation)







After the Datasource SQL is defined, an administrator can create one or more dashlets.

Each dashlet can be configured to use different columns, filters, and groupings.



For more detailed information on using the Report Wizard refer to the [Online Documentation](#).

Dashboards - Chart Types

Chart Type	Definition
Area Chart 	An area chart or area graph displays graphically quantitative data. It is based on the line chart. The area between axis and line are commonly emphasized with colors, textures and hatching. Commonly one compares with an area chart two or more quantities
Bar Chart 	A bar chart or bar graph is a chart or graph that presents categorical data with rectangular bars with heights or lengths proportional to the values that they represent. The bars can be plotted vertically or horizontally. A vertical bar chart is sometimes called a line graph . A bar graph shows comparisons among discrete categories. One axis of the chart shows the specific categories being compared, and the other axis represents a measured value. Some bar graphs present bars clustered in groups of more than one, showing the values of more than one measured variable.
Column Chart 	A column chart is a graphic representation of data. Column charts display vertical bars going across the chart horizontally, with the values axis being displayed on the left side of the chart .
Line Chart 	A line chart or line graph is a type of chart which displays information as a series of data points called 'markers' connected by straight line segments. It is a basic type of chart common in many fields. ... In these cases they are known as run charts.
Pie Chart 	A pie chart (or a circle chart) is a circular statistical graphic which is divided into slices to illustrate numerical proportion. In a pie chart, the arc length of each slice (and consequently its central angle and area), is proportional to the quantity it represents. While it is named for its resemblance to a pie which has been sliced, there are variations on the way it can be presented.
Spline Chart 	Spline charts are a specialized form of line charts that display smooth curves through the different data points. Spline charts can be used for plotting data that requires the usage of curve-fitting e.g., an impulse-response chart , a product life cycle chart , etc.

For more detailed information on using the Report Wizard refer to the [Online Documentation](#).