Vizion Platform® Reports and Dashboards

Agenda

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

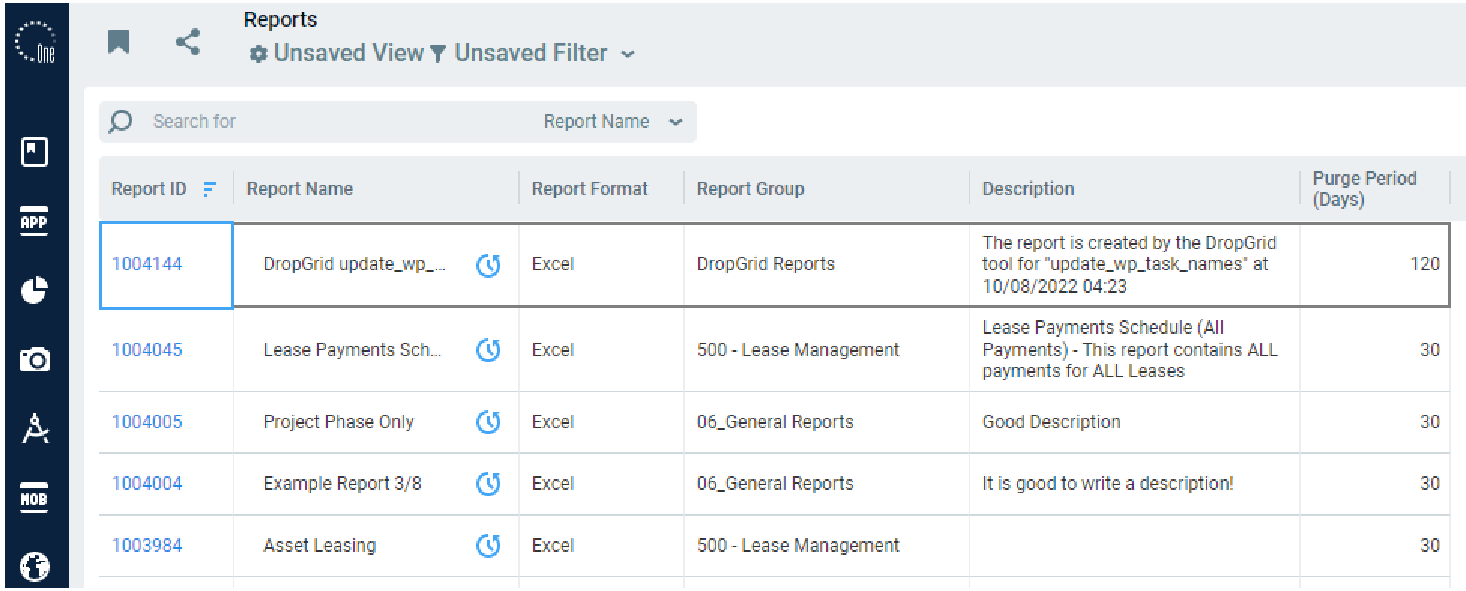
Reports

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



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

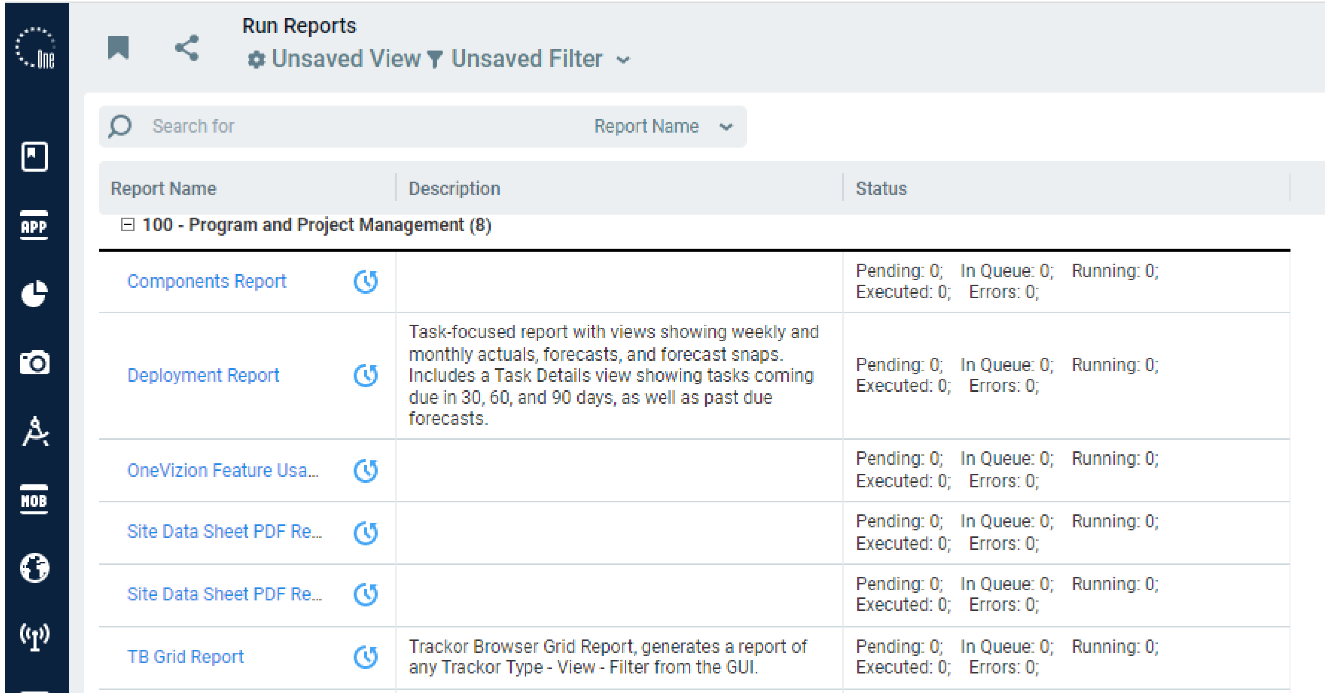
Running Reports

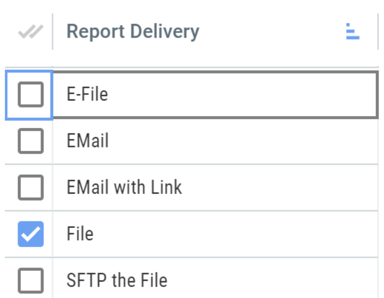
Users can run reports from the “Run Reports” page.

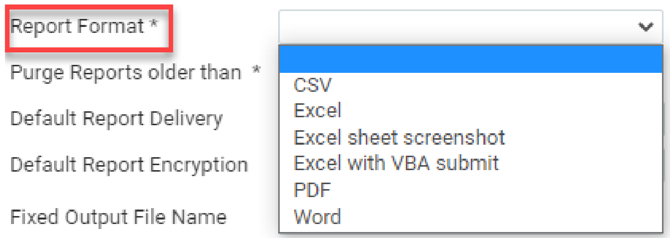
Report deliveries include E-File, Email, Email with Link, File, SFTP the File.

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

Note: Only reports assigned to the user are available.

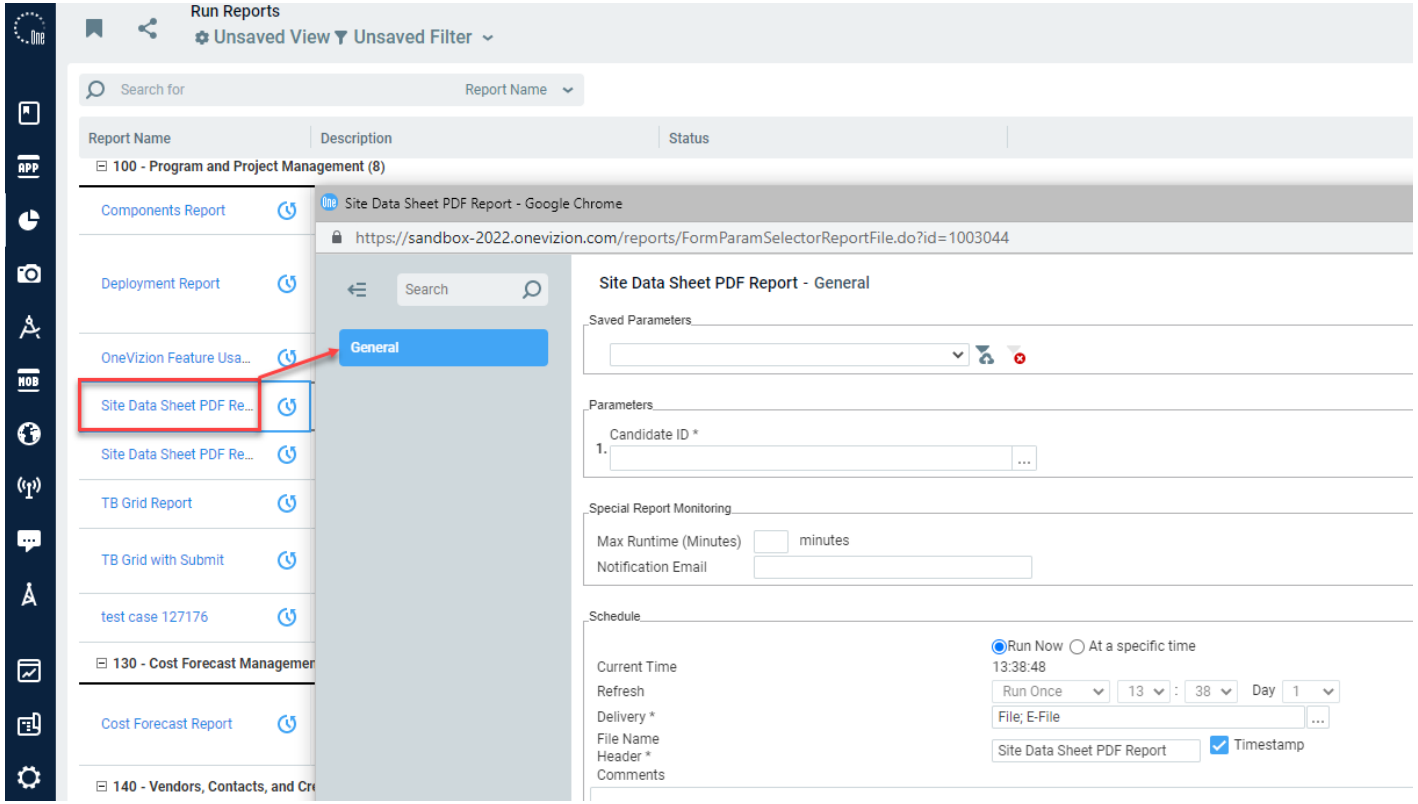






Running Reports

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.

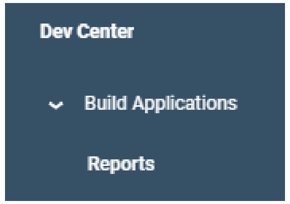


Reports can be configured with one or more parameters. These can behave as filters to the report data.

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.

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.

Reports

Unsaved View Unsaved Filter

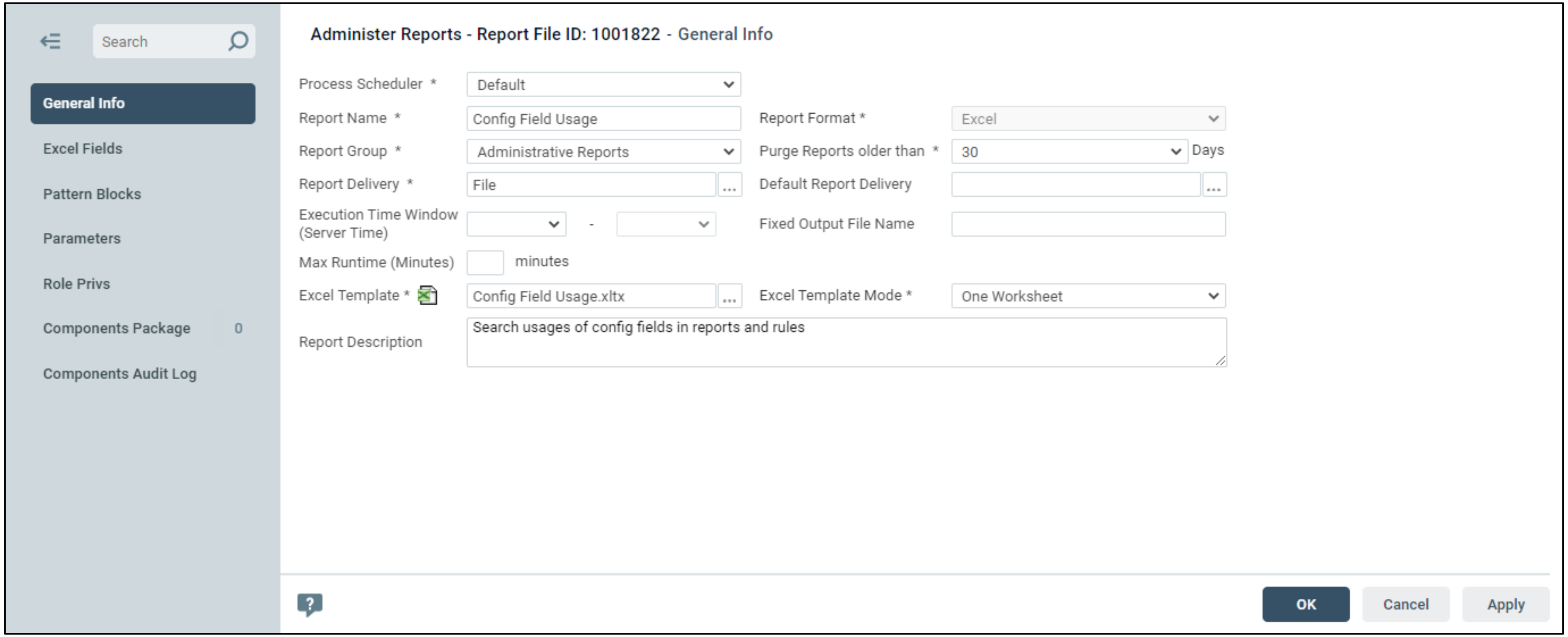
Search for Report Name

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.



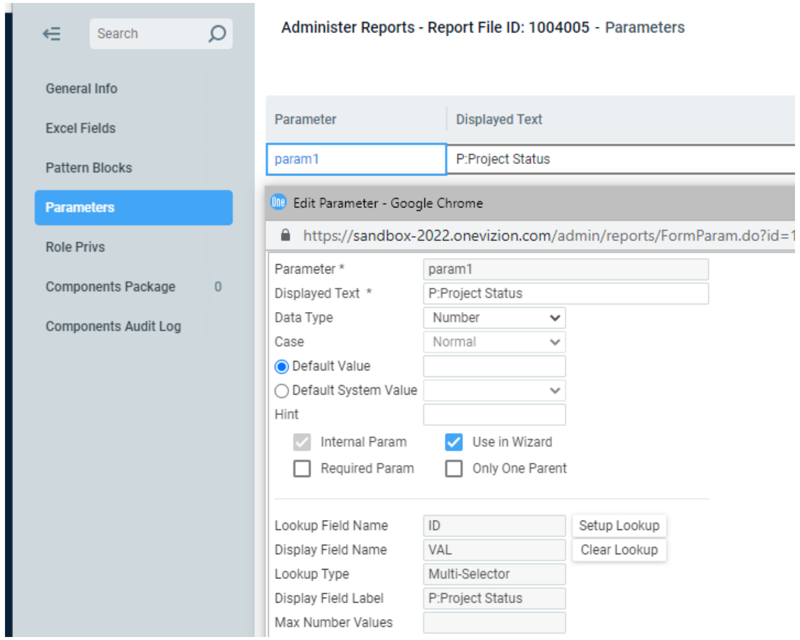
Configuring Reports

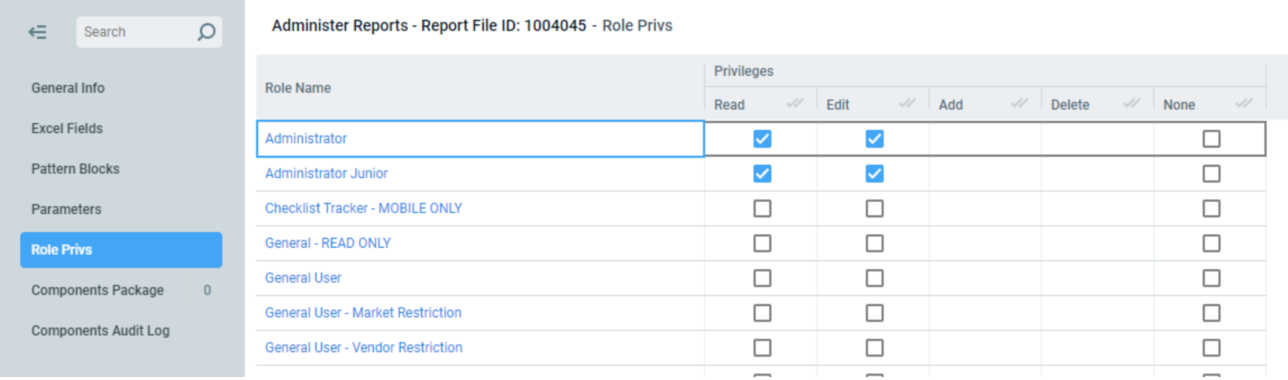
Parameters allow the user to filter the data used in the report.

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

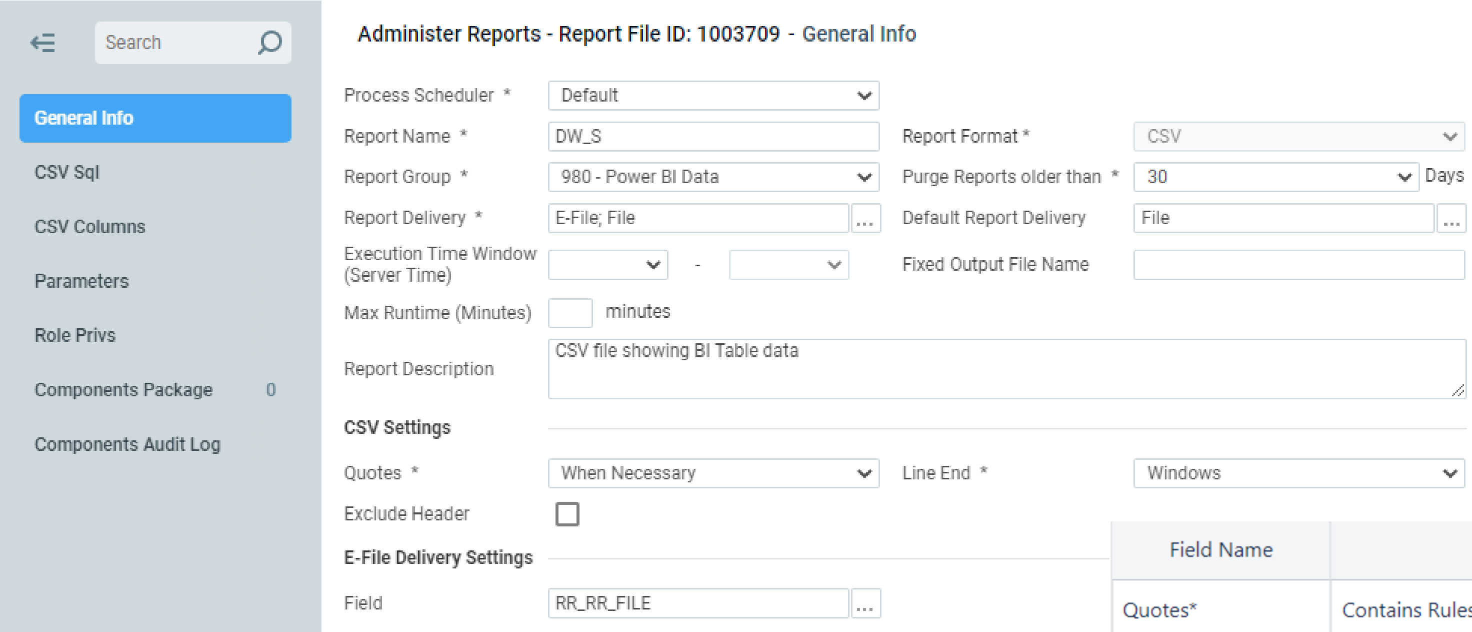
The Roles Privs tab is used to assign specific Security Roles to the Report.

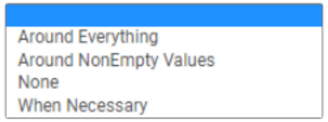
The Components Audit Log contains a listing of changes made to the Report.





Configuring Reports (CSV)



Field Name	Description
Quotes*	Contains Rules for when to include or not include quotes. 
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.

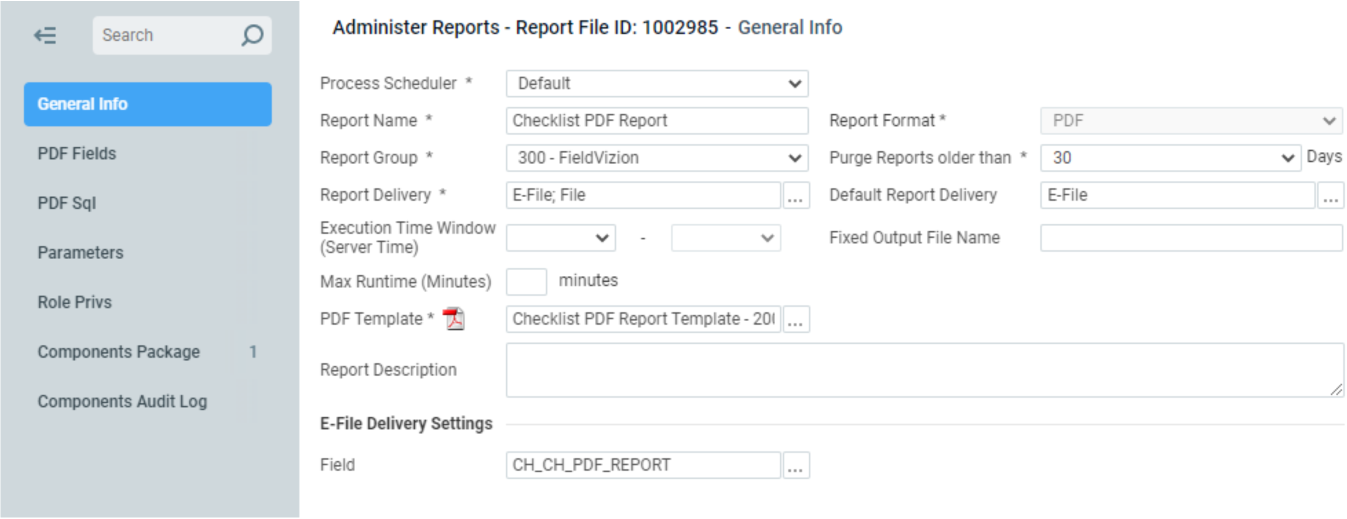
Configuring Reports (PDF)

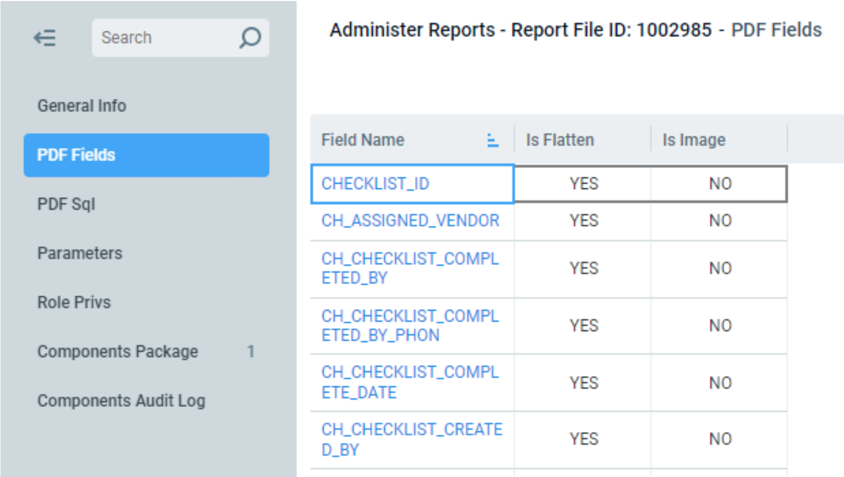
PDF Template* - Contains the template used by the Report. Click the Ellipsis icon to choose a file from a local computer as the template. The file type selected must be a PDF (.pdf file extension).

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.



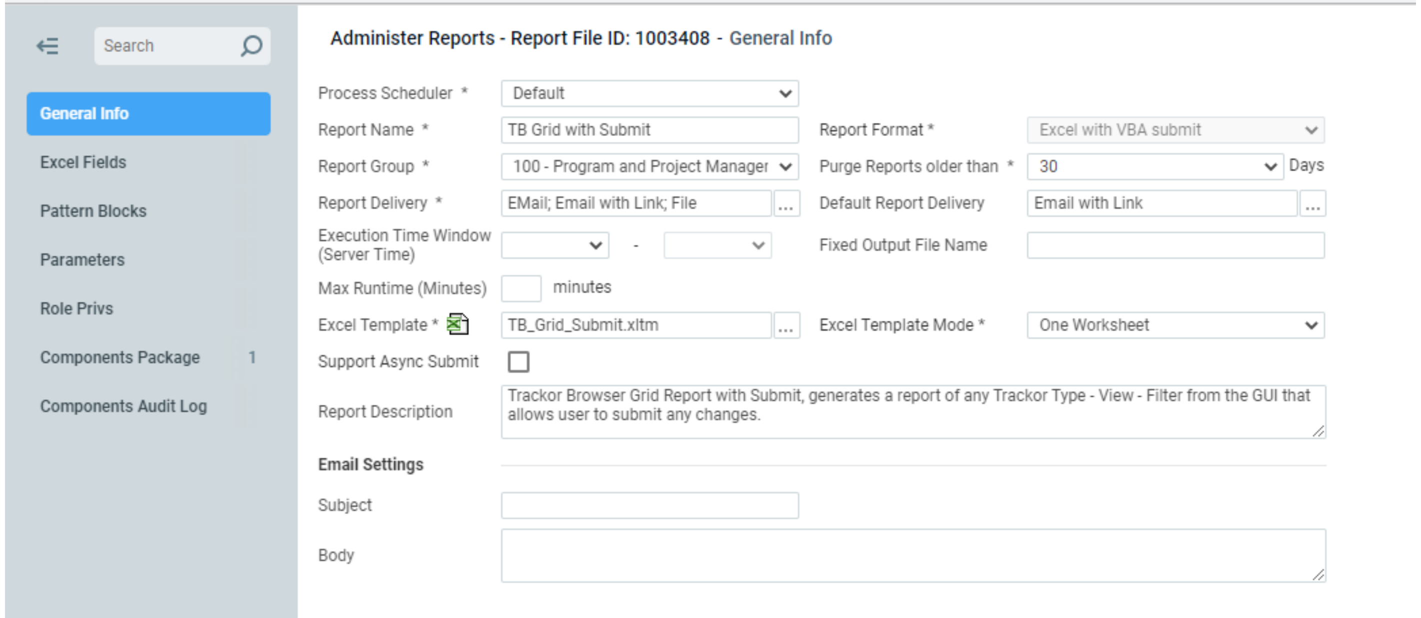


Configuring Reports (Excel with VBA)

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.



Configuring Reports (Word Reports)

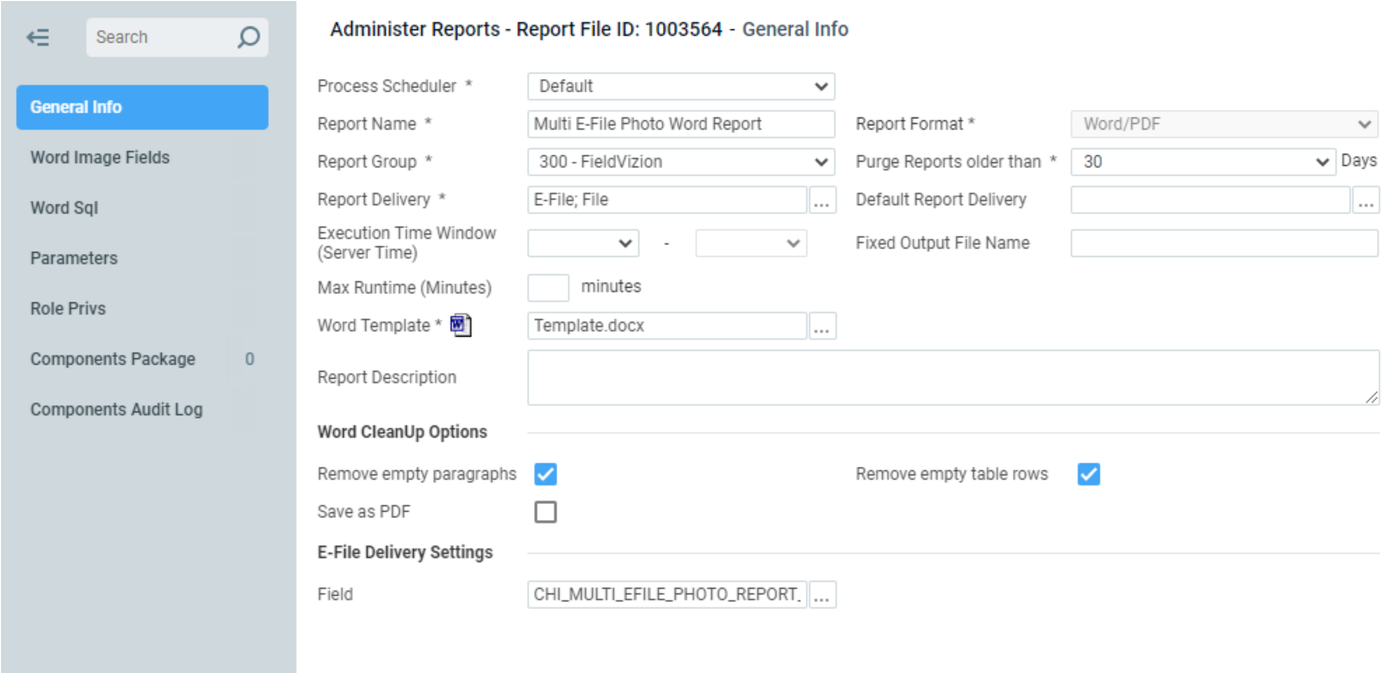
Users may create a Report using the Word Report Format. When Word as the Report Format is selected, the Word Template field will appear.

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.



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.

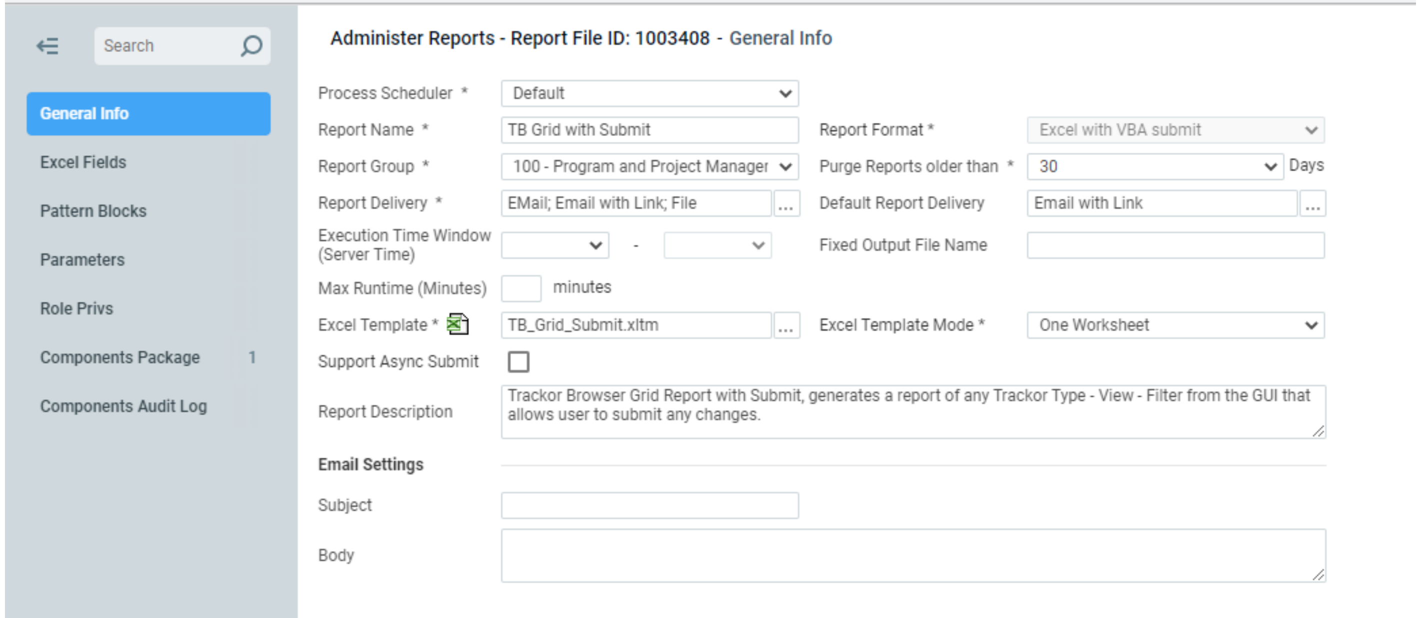
Report Wizard

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 Trackor Type, data fields, and parameters for a new Report.

Both Excel and CSV reports are supported with this feature.

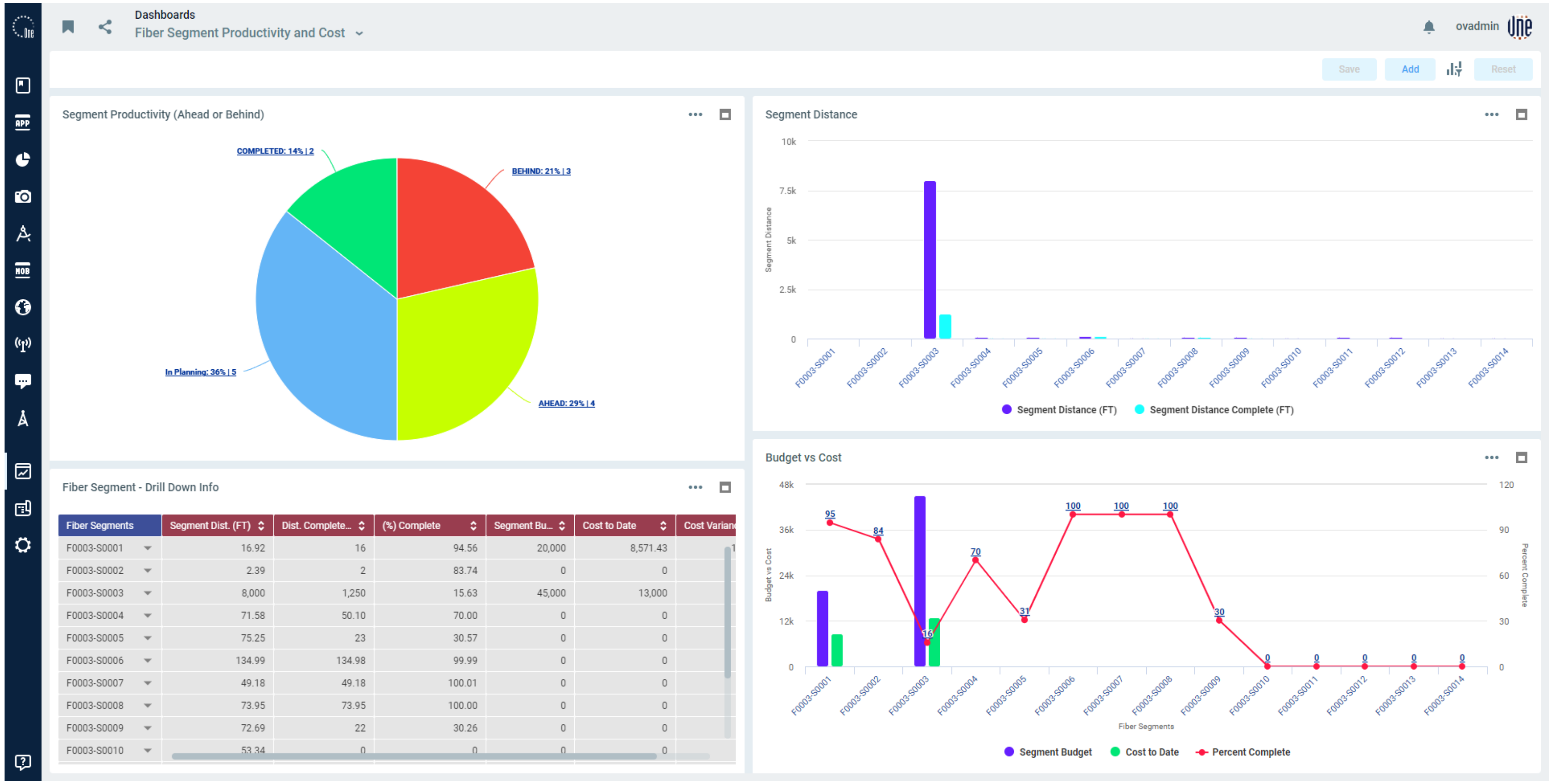
For more detailed information on using the Report Wizard refer to the [Online Documentation.]



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).

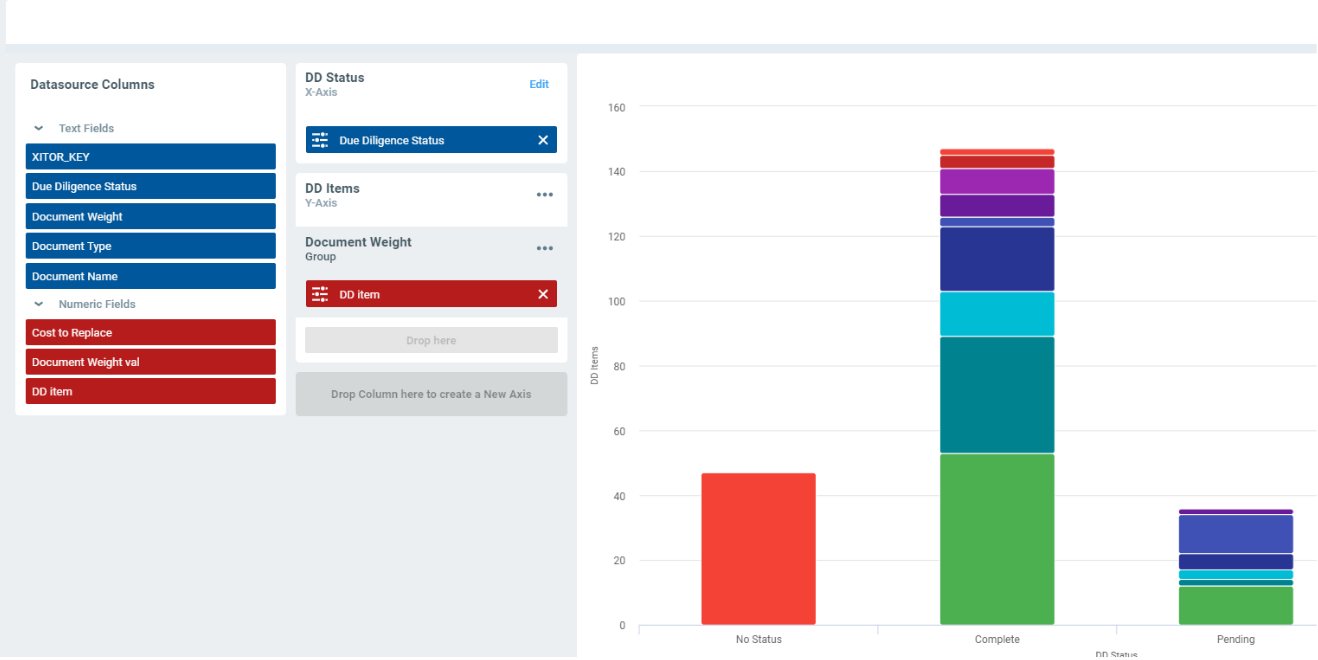


For more detailed information on using the Report Wizard refer to the [Online Documentation.]()

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.