

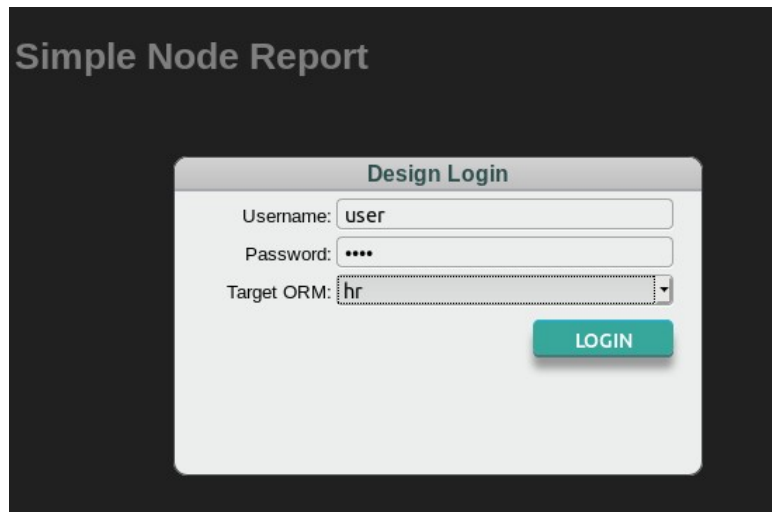
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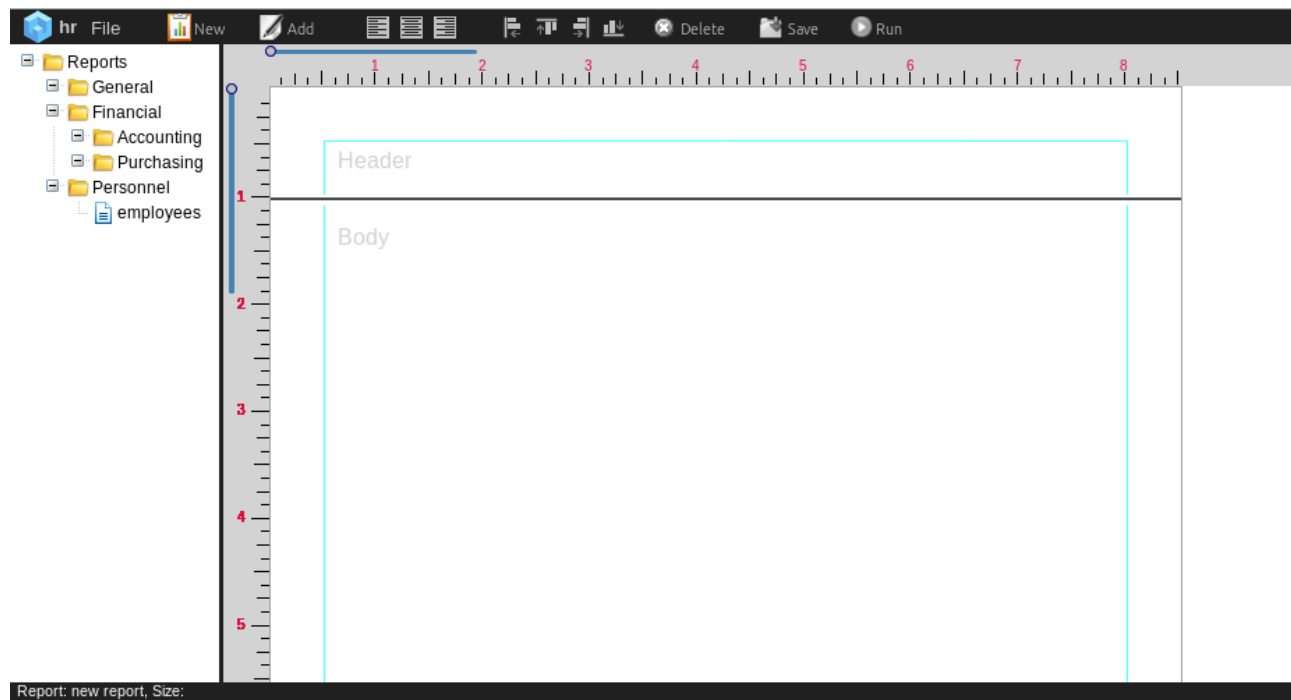
Getting Started

Login

Pull up the application in the browser, select the desired ORM, enter Username and Password if required and click **Login**.



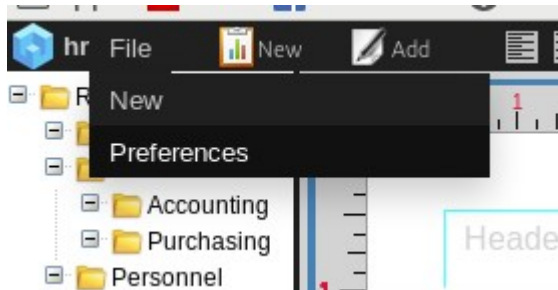
Once logged in you should see a screen similar to this:



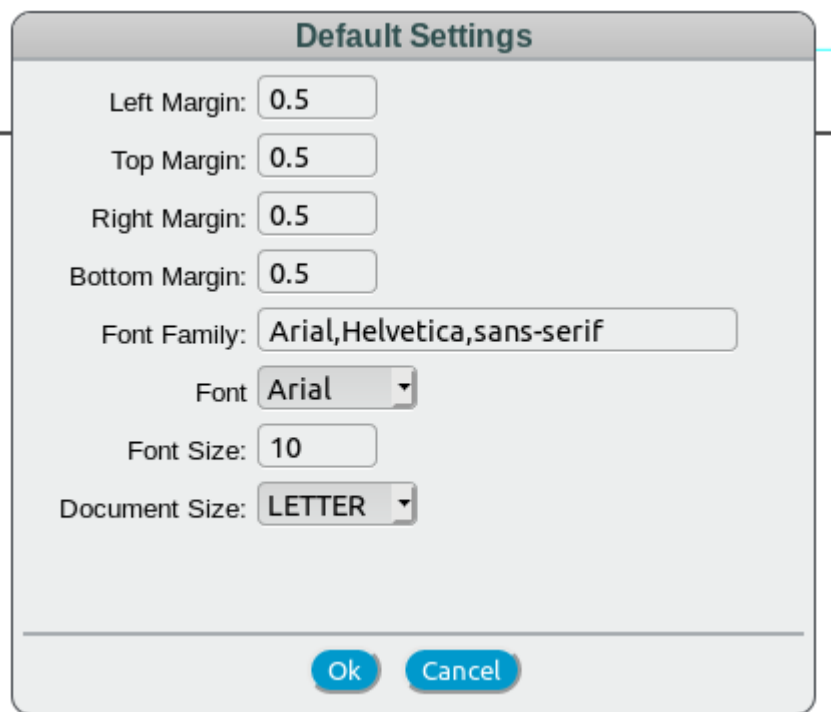
The left pane contains the document tree. The right pane contains the document design panel. Previously created report documents will display in the left pane - "employees" is an example.

Setting Default Preferences

Click the **File** menu item on the application toolbar the click **Preferences** from the dropdown menu to show the Default Settings panel.

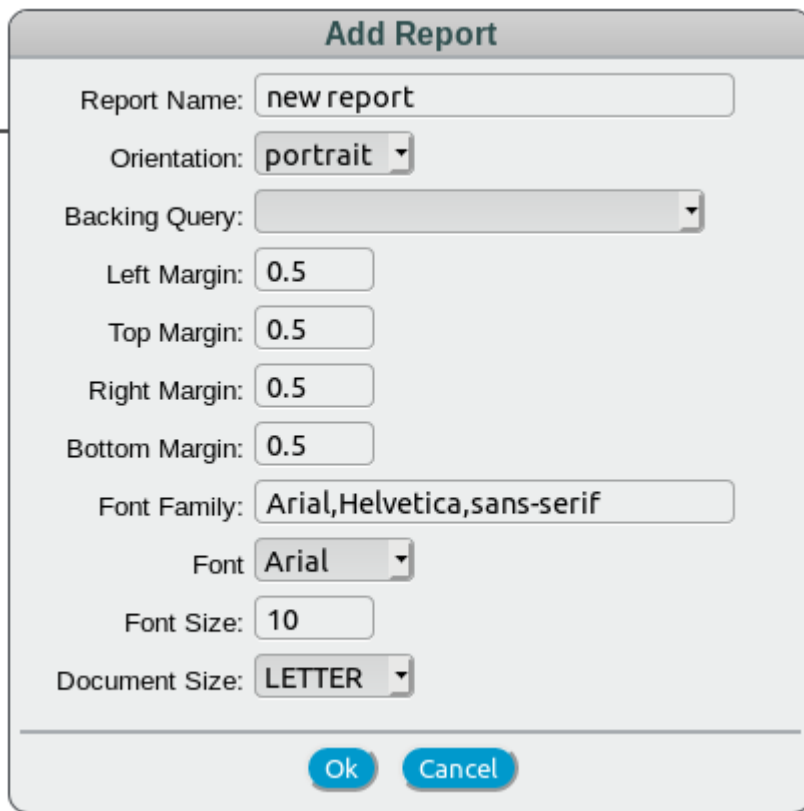


Set your desired default settings. These are what will pre-populate the report settings when you create a new report.



Report Designer

From the application toolbar click the **New** report icon to display the Add Report panel:

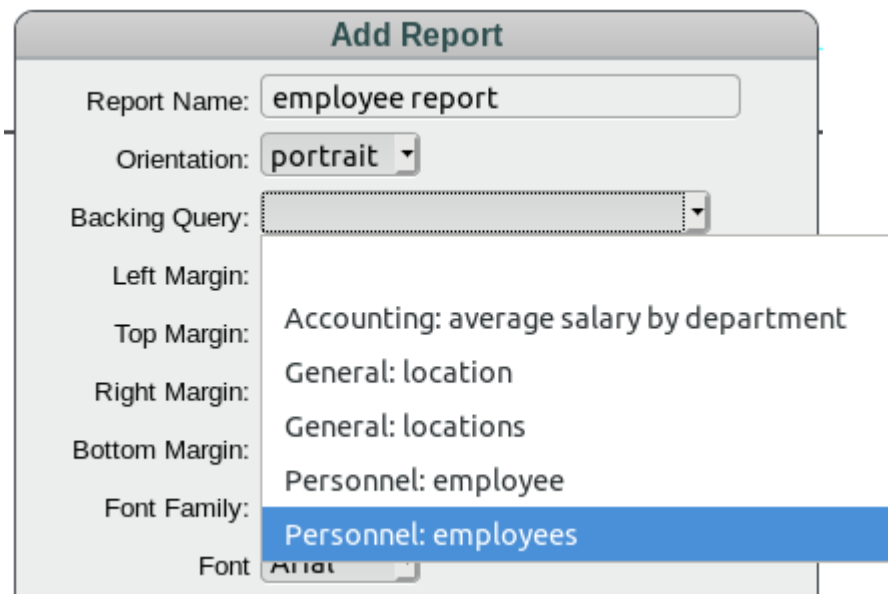


The 'Add Report' dialog box is shown with the following settings:

- Report Name: new report
- Orientation: portrait
- Backing Query: (empty)
- Left Margin: 0.5
- Top Margin: 0.5
- Right Margin: 0.5
- Bottom Margin: 0.5
- Font Family: Arial,Helvetica,sans-serif
- Font: Arial
- Font Size: 10
- Document Size: LETTER

Buttons: Ok, Cancel

Enter an appropriate report name and select a backing query.



The 'Add Report' dialog box is shown with the following settings:

- Report Name: employee report
- Orientation: portrait
- Backing Query: (dropdown menu open)
- Left Margin: (empty)
- Top Margin: (empty)
- Right Margin: (empty)
- Bottom Margin: (empty)
- Font Family: (empty)
- Font: (empty)
- Font Size: (empty)
- Document Size: (empty)

Buttons: Ok, Cancel

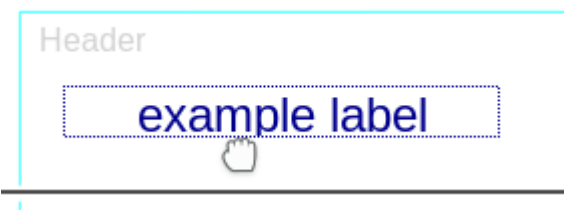
Backing Query dropdown menu options:

- Accounting: average salary by department
- General: location
- General: locations
- Personnel: employee
- Personnel: employees (highlighted)

Make any other desired modifications to the report format and click **Ok** to start designing a new report.

Common Report Object Operations

When designing a report there are some common operations that select, move, resize and edit report objects. For this discussion we will use the “example label” in the header section shown below. Note that this label has the defined label border. This border is for development purposes only to identify labels and will not display in active report.



Select an Object

To select a report object press the **CTRL** key and left click the object with the mouse. The object will display the **selected** (defaults to red) border. To deselect the object **CTRL** click again. To deselect all selected objects hit the **ESC** key.



Resize an Object

Report objects can be resized in 2 ways:

1. Hover the mouse over a border and when the resize cursor displays, drag the border



2. Selected objects can be resized by holding down **shift** key and pressing the **arrow** keys. Resizing will be applied to all selected objects.



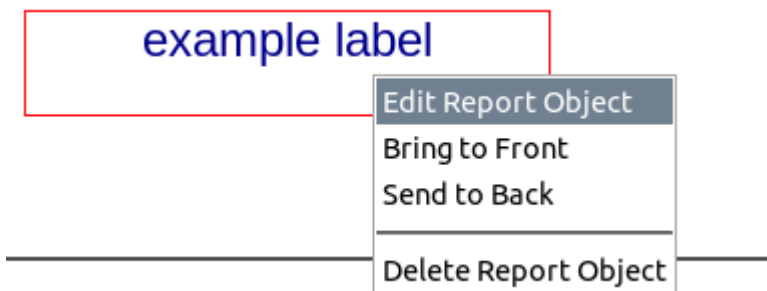
Moving and Object

To move a report object the user can drag it with the mouse or select an object and use the **arrow** keys

Editing an Object

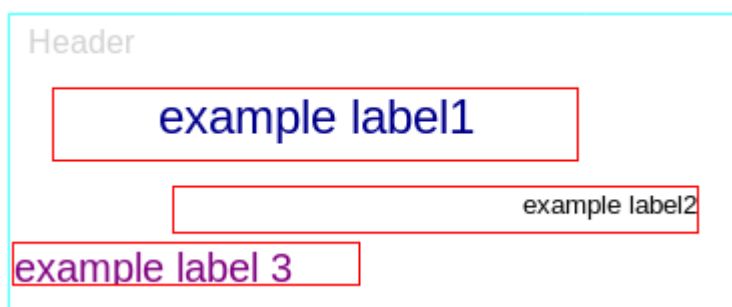
Report Designer

To edit or delete an existing report object, right click on the object and select the desired option from the popup menu.

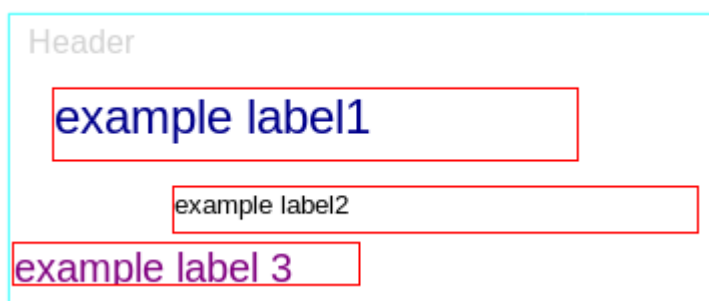


Text Align Multiple Objects

To set the text alignment on multiple objects, select the target objects:

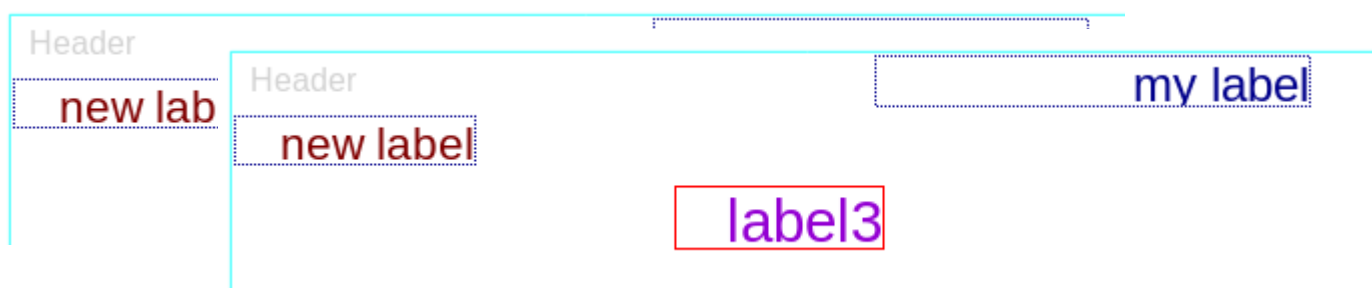


then click the desired alignment icon on the tool bar.



Align Multiple Objects

To align multiple objects, select the desired target objects. The selected objects will align to the associated border of the first selected object. Click the desired object align icon:





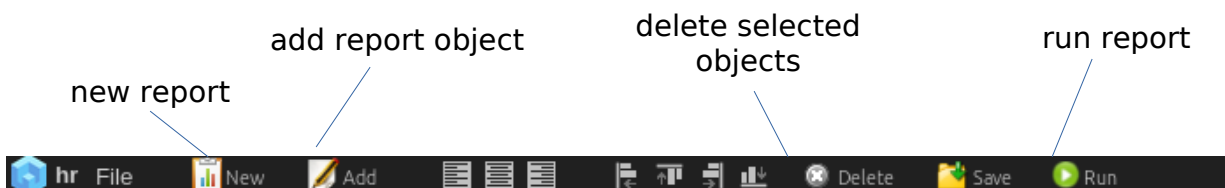
The Report Design Panel

After completing the steps listed in the previous section you are presented with an enabled report design panel formatted based on your selections. Key design panel components are described below.

Application Toolbar

The application toolbar provides the following functionality:

- Add new report
- Add report objects
- Text align on selected report objects
- Report object align
- Delete selected report objects
- Save report
- Run report





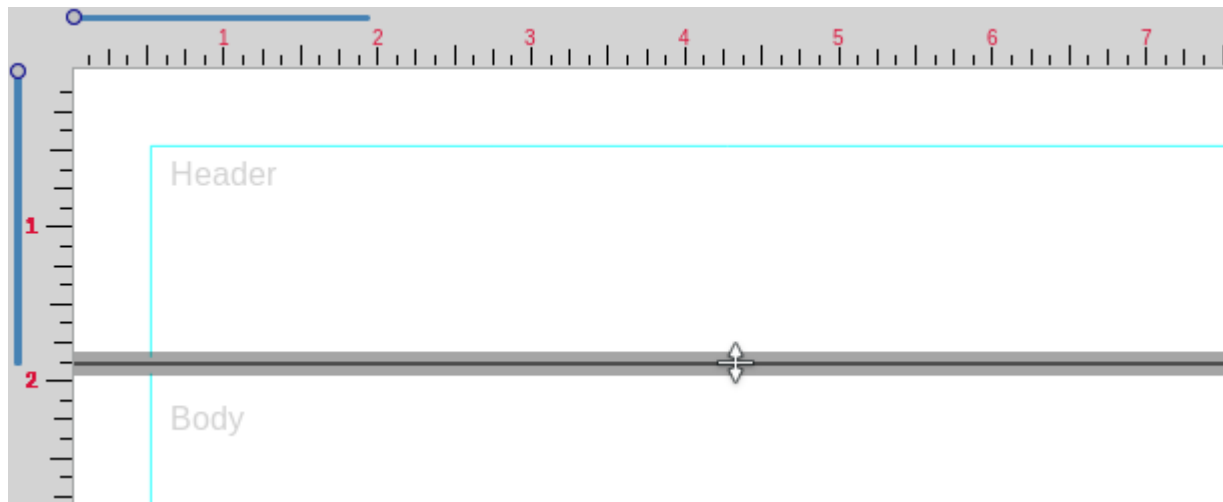
text align
selected objects

align selected
objects

save report

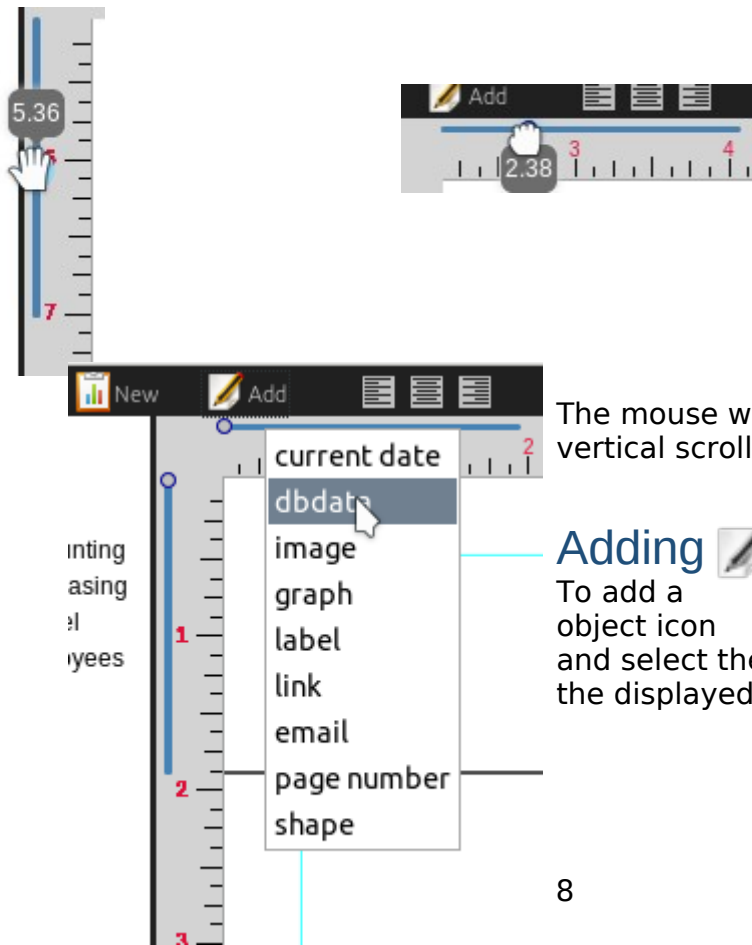
Page Sections

The design panel is broken into 3 page sections - header, body and footer. These sections are resizable by moving the section separator.



Page Design Scroll

Use the vertical and horizontal design scroll controls to scroll the report design:



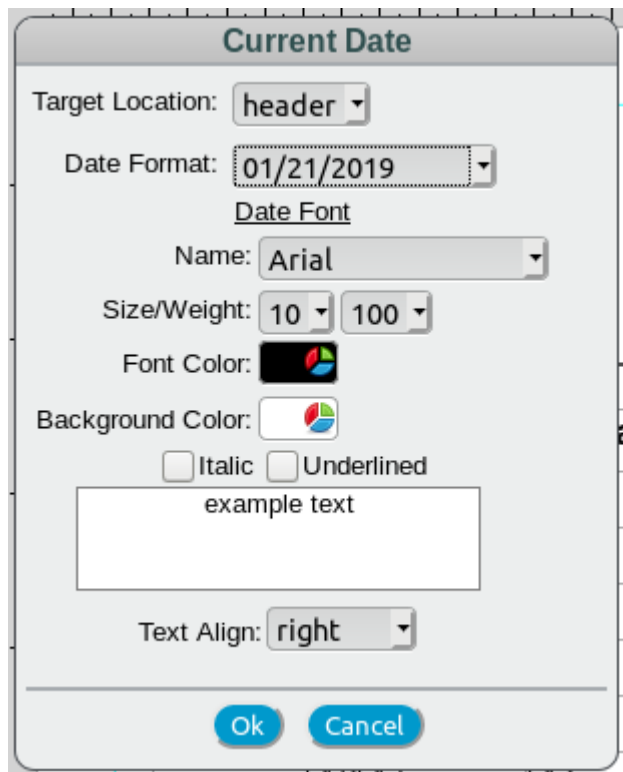
The mouse wheel can also be used for vertical scrolling.

Adding Report Objects

To add a report object, click the add report object icon and select the desired object type from the displayed list:

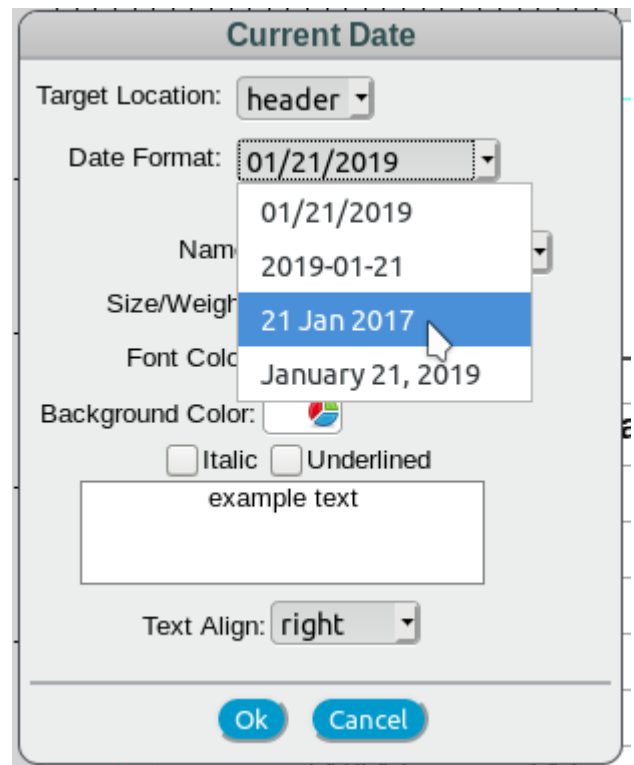
Current Date

To add a current date object to the report select **current date** from the add object dropdown.



The 'Current Date' dialog box is shown with the following settings:

- Target Location: **header**
- Date Format: **01/21/2019**
- Date Font:
 - Name: **Arial**
 - Size/Weight: **10** / **100**
 - Font Color: **Black**
 - Background Color: **White**
 - ☐ Italic ☐ Underlined
- example text
- Text Align: **right**
- Buttons: **Ok** and **Cancel**



The 'Current Date' dialog box is shown with the 'Date Format' dropdown menu open, displaying the following options:

- 01/21/2019
- 2019-01-21
- 21 Jan 2017** (highlighted)
- January 21, 2019

The other settings in the dialog box are the same as in the previous image.

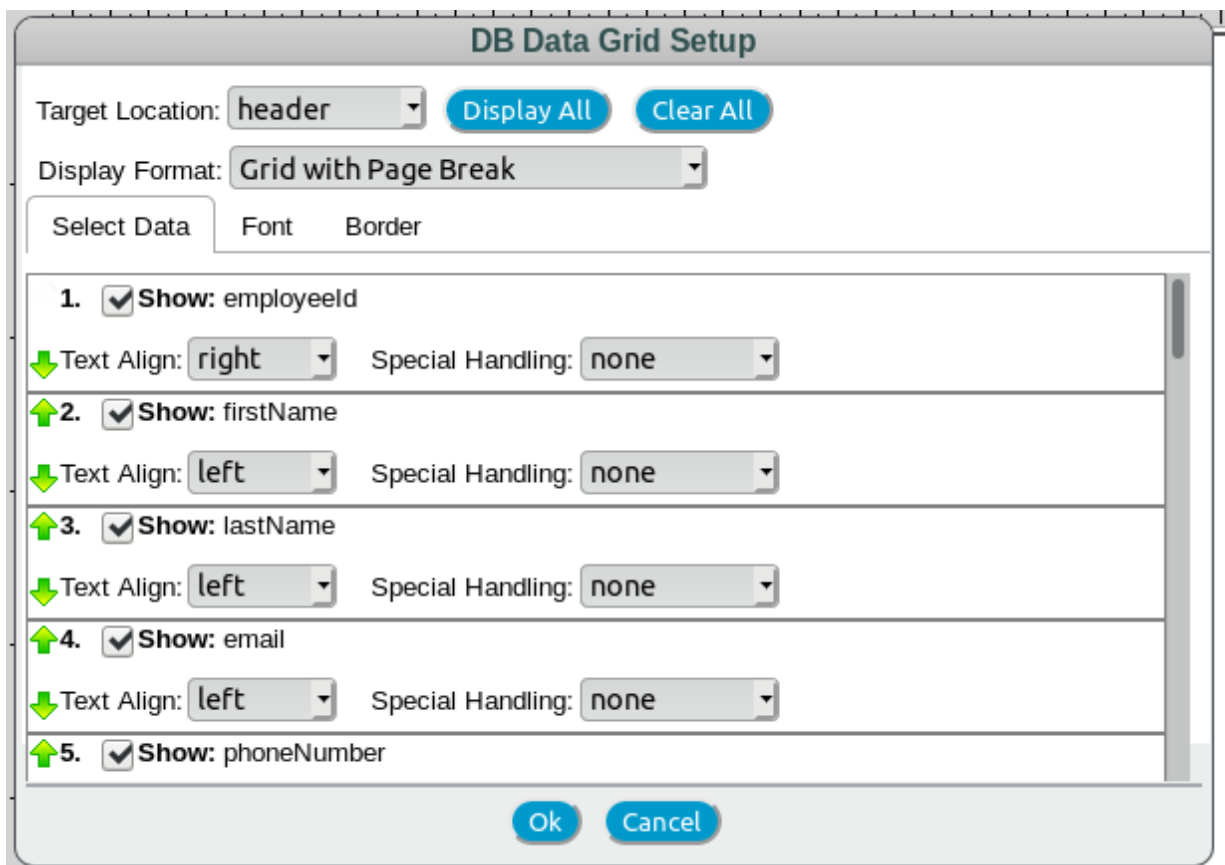
Select the report section, date format and set the font as desired then click **Ok** to add to the report.

Header
13 Mar 2019

The current report run date will be inserted into this object.

DB Data

The dbdata report object is the report link to the backing query result data. An example of the object setup panel is shown below:



DB Data Grid Setup

Target Location: **header** **Display All** **Clear All**

Display Format: **Grid with Page Break**

Select Data Font Border

1. <input checked="" type="checkbox"/> Show: employeeId	Text Align: right	Special Handling: none
2. <input checked="" type="checkbox"/> Show: firstName	Text Align: left	Special Handling: none
3. <input checked="" type="checkbox"/> Show: lastName	Text Align: left	Special Handling: none
4. <input checked="" type="checkbox"/> Show: email	Text Align: left	Special Handling: none
5. <input checked="" type="checkbox"/> Show: phoneNumber	Text Align: left	Special Handling: none

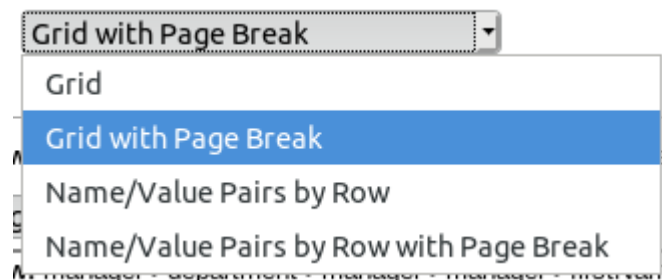
Ok **Cancel**

The **Select Data** panel above allows the user to select, order and format result set data for the report object. By default, all available columns in the backing query are selected. The user can click the **Display All** and **Clear All** buttons to change all the column selections. Individual columns can be selected and deselected by clicking the **Show** checkbox. Column names are shown next to Show checkbox. The format will show the path to the column so more complex data from child objects are shown as an arrow delimited string - for example:

↑106. ☒ **Show:** manager->department->manager->manager->lastName

↓Text Align: Special Handling:

Selected column order can be adjusted by clicking the green arrows. **Display Format** allows the user to select how the data will be displayed on the report and how to control page breaks.



The selections are described below:

- **Grid** – displays a standard column/row table with the selected result set data. Column and rows are resizable via mouse.
- **Grid with Page Break** – displays column/row table and forces a page break when the report object display area is full. Column and rows are resizable via mouse.
- **Name/Value Pairs by Row** – displays a vertical Name Value list of row data, each Name and value is an individual object which can be moved and resized as desired.
- **Name/Value Pairs by Row with Page Break** – displays a vertical Name Value list of row data and forces a page break after each row.

Below are examples of the Grid and Name/Value objects:

Body

employeeId	firstName	lastName	email	phoneNumber
r0c0	r0c1	r0c2	r0c3	r0c4
r1c0	r1c1	r1c2	r1c3	r1c4
r2c0	r2c1	r2c2	r2c3	r2c4
r3c0	r3c1	r3c2	r3c3	r3c4
r4c0	r4c1	r4c2	r4c3	r4c4
r5c0	r5c1	r5c2	r5c3	r5c4
r6c0	r6c1	r6c2	r6c3	r6c4
r7c0	r7c1	r7c2	r7c3	r7c4
r8c0	r8c1	r8c2	r8c3	r8c4
r9c0	r9c1	r9c2	r9c3	r9c4
r10c0	r10c1	r10c2	r10c3	r10c4

Body

employeeId	employeeId
firstName	firstName
lastName	lastName
email	email
phoneNumber	phoneNumber

Special Handling can be applied to report columns. For numeric fields the following options are available:

8. <input checked="" type="checkbox"/> Show: salary	Text Align: right	Special Handling: none
9. <input checked="" type="checkbox"/> Show: commissionPct	Text Align: right	Special Handling: sum
10. <input checked="" type="checkbox"/> Show: managerId	Text Align: right	Special Handling: avg
11. <input checked="" type="checkbox"/> Show: departmentId	Text Align: right	Special Handling: max
		Special Handling: min

If selected, the numeric options will display on a Grid object in a totals line at the added at the end of the grid. The option will not be applied to the Name/Value pairs display type.

For text column types the following options are available:

15. <input checked="" type="checkbox"/> Show: manager->email	Text Align: left	Special Handling: none
16. <input checked="" type="checkbox"/> Show: manager->phoneNumber	Text Align: left	Special Handling: email
17. <input checked="" type="checkbox"/> Show: manager->hireDate		Special Handling: link
		Special Handling: image

If selected, the text-based options will apply to the displayed data. For email and link options the text will be used for an html anchor tag. For the image option, it will be assumed that the text is an image url and an html image tag will be created.

Report Designer

The **Font** and **Border** tabs allow the user to set header and data font and border properties and the displayed results:

Select Data

Font

Border

Header Font:


Name:


Arial

Size/Weight:

10

900

Font Color: 

Background Color: 

☐ Italic ☐ Underlined

example text

Data Font:


Name:


Arial

Size/Weight:

10

100

Font Color: 

Background Color: 

☐ Italic ☐ Underlined

example text

Select Data

Font

Border


Header Border:

Style:

solid

Width:

2

Border Color: 

☒ left ☒ Top

☒ right ☒ Bottom

Example:


Data Border:

Style:

solid

Width:

1

Border Color: 

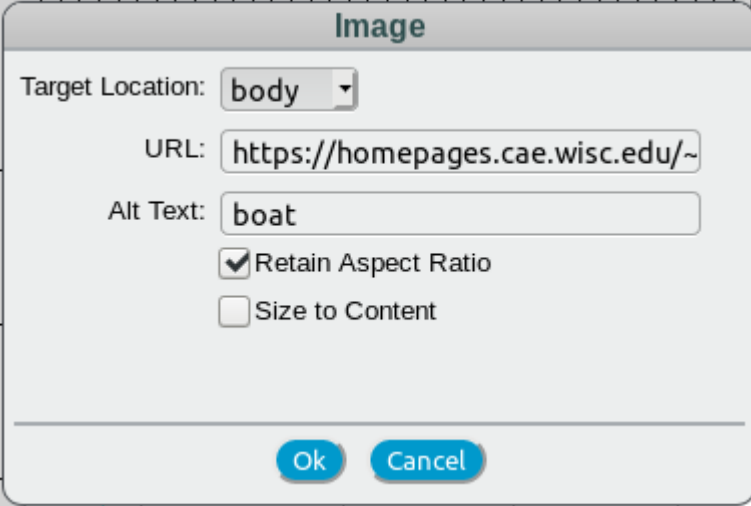
☒ left ☒ Top

☒ right ☒ Bottom

Example:

Image

Select **image** from the report object popup menu to add an image to the report.



The 'Image' dialog box contains the following fields and options:

- Target Location: **body** (dropdown menu)
- URL: **https://homepages.cae.wisc.edu/~** (text input)
- Alt Text: **boat** (text input)
- ☒ Retain Aspect Ratio
- ☐ Size to Content
- Buttons: **Ok** and **Cancel**

Select target page location, enter image URL and Alt text and click Ok to place image object on the report. The checkboxes support the following:

- Retain Aspect Ratio - if checked the image will retain the original aspect ratio and fit the report object rectangle based on the max/min sizes required.
- Size to Content - if checked the image will be placed in the report at it's original size. If the report object size is smaller than the image size then only a portion of the image will be visible. If not checked the image will be sized to the report object size.



Graph

This functionality is currently under construction and will be in a future release.

Label

To create a label object select **label** from the report object dropdown menu:



Report Designer

Label

Target Location: **header**

Label Example

Label Font

Name: **Times New Roman**

Size/Weight: **20** **700**

Font Color:

Background Color:

☐ Italic ☐ Underlined

example text

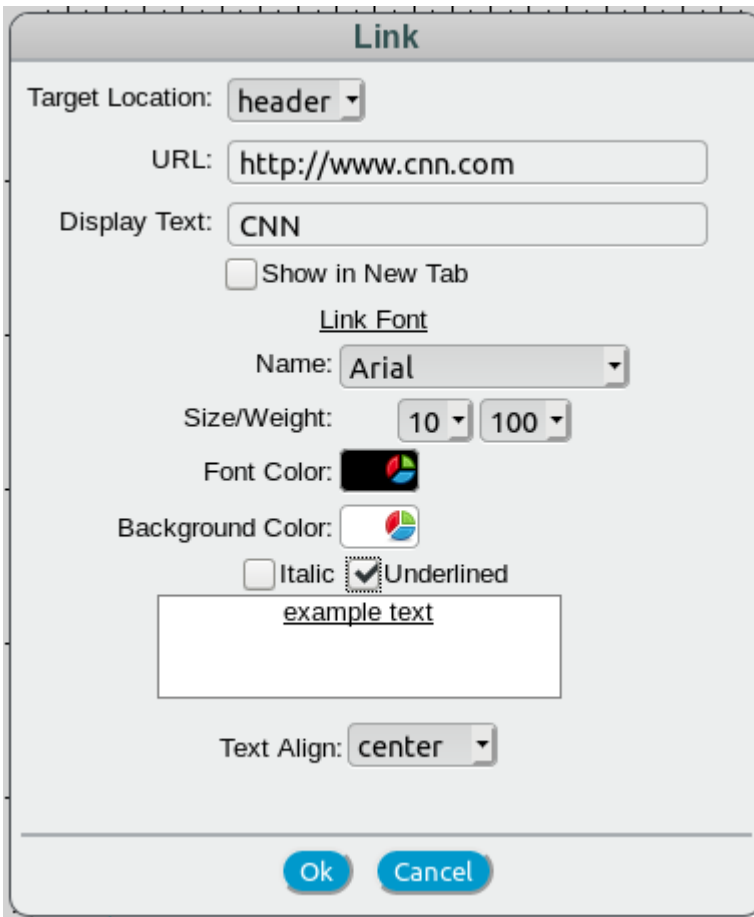
Text Align: **left**

Ok **Cancel**



Header	Label Example
Body	

Link

To create a link select **link** from the report object dropdown:



The image shows a 'Link' dialog box with the following settings:

- Target Location: **header**
- URL: **http://www.cnn.com**
- Display Text: **CNN**
- ☐ Show in New Tab
- Link Font
 - Name: **Arial**
 - Size/Weight: **10** **100**
 - Font Color: 
 - Background Color: 
 - ☐ Italic ☒ Underlined
- example text
- Text Align: **center**

Buttons: **Ok** **Cancel**

Select target location and desired font format. If you would like the contents of the URL to display in new tab when clicked, check the **Show in New Tab** checkbox.



Email

Email is very similar to the link example above. Select **email** from the report object dropdown and choose your desired setting.

Page Number

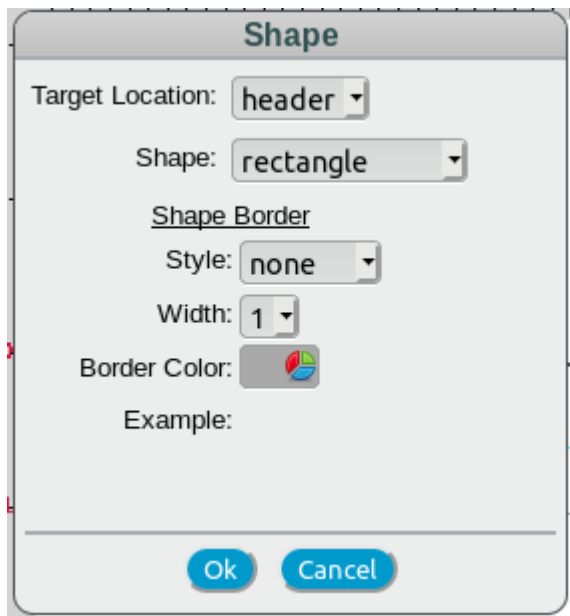
To add a page number to report select **page number** from the report object dropdown:

Select the page number location, format and desired font format then click **Ok** to add to the report. Available locations and formats are shown below.:

When the report is run the current page number will be placed in the object.

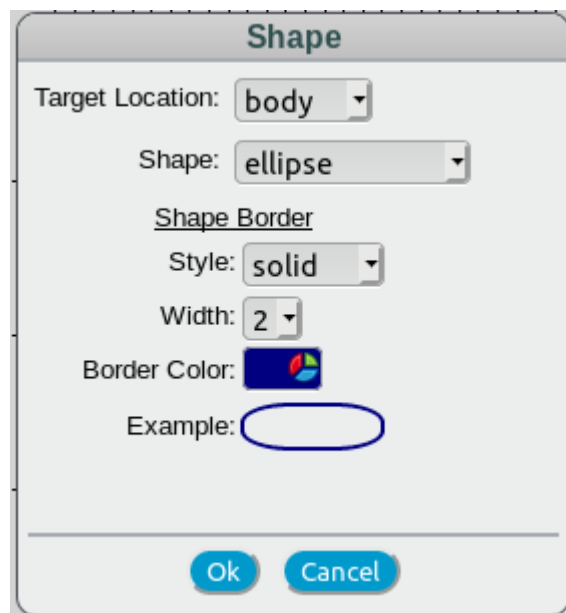
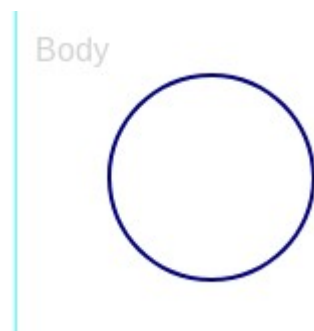
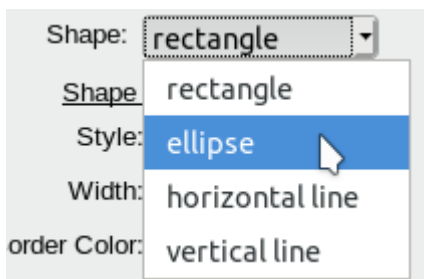
Shape

To add a shape to the report select **shape** from the report object dropdown:



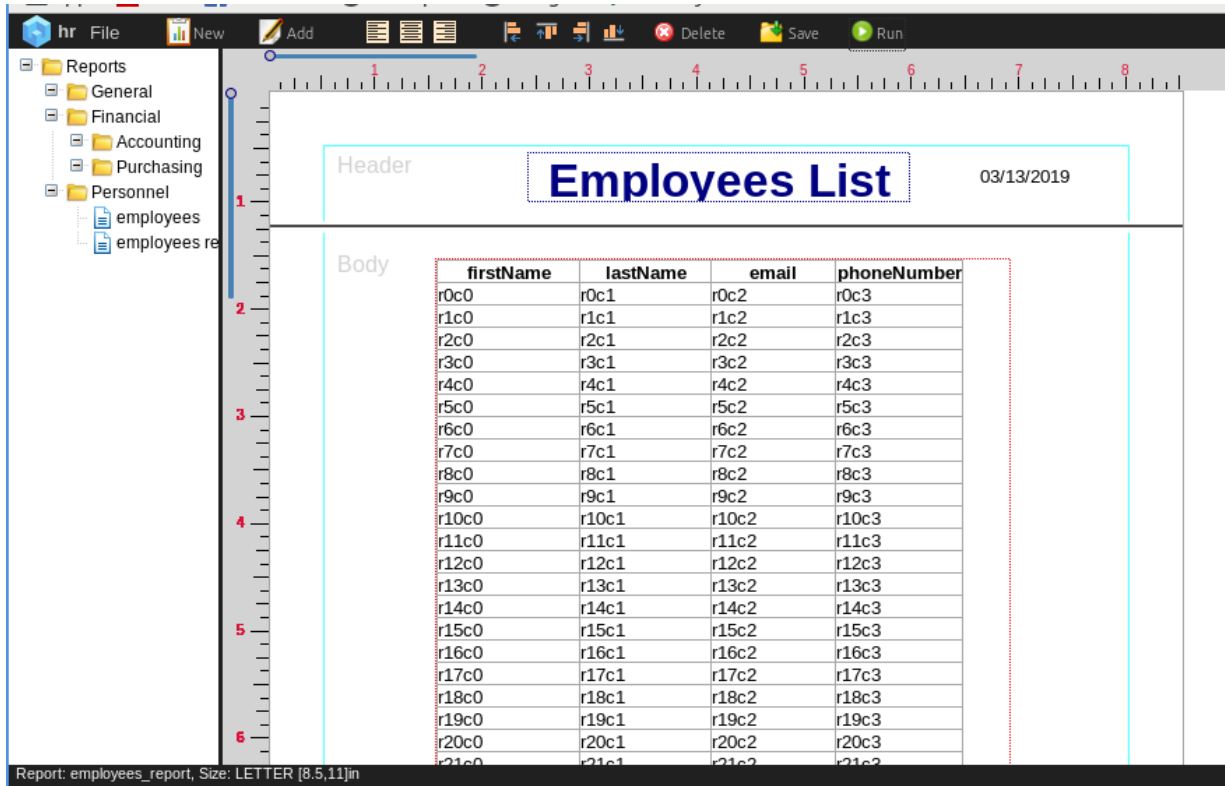
Select target location, desired shape and font format then click **Ok** to add to report.

The available shapes are shown below:

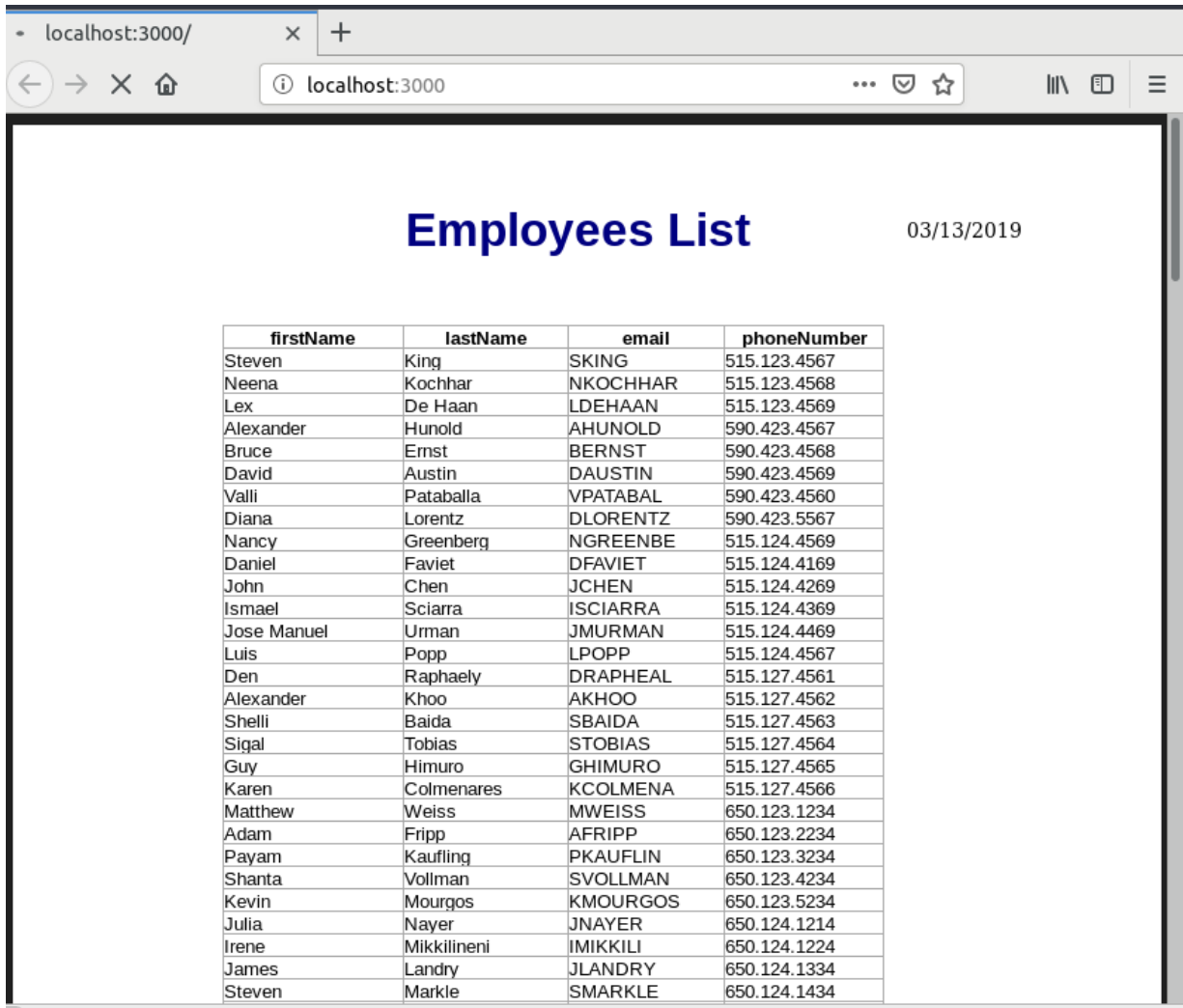


Running the Report

For test purposes the designed report can be run from the designer by clicking the run icon on the toolbar. So if we design a report something like this:

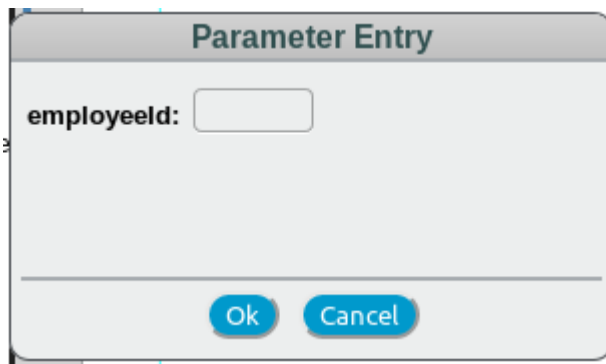


and click the run button we will get something like this:



firstName	lastName	email	phoneNumber
Steven	King	SKING	515.123.4567
Neena	Kochhar	NKOCHHAR	515.123.4568
Lex	De Haan	LDEHAAN	515.123.4569
Alexander	Hunold	AHUNOLD	590.423.4567
Bruce	Ernst	BERNST	590.423.4568
David	Austin	DAUSTIN	590.423.4569
Valli	Pataballa	VPATABAL	590.423.4560
Diana	Lorentz	DLORENTZ	590.423.5567
Nancy	Greenberg	NGREENBE	515.124.4569
Daniel	Faviet	DFAVIET	515.124.4169
John	Chen	JCHEN	515.124.4269
Ismael	Sciarra	ISCIARRA	515.124.4369
Jose Manuel	Urman	JMURMAN	515.124.4469
Luis	Popp	LPOPP	515.124.4567
Den	Raphaely	DRAPHEAL	515.127.4561
Alexander	Khoo	AKHOO	515.127.4562
Shelli	Baida	SBAIDA	515.127.4563
Sigal	Tobias	STOBIAS	515.127.4564
Guy	Himuro	GHIMURO	515.127.4565
Karen	Colmenares	KCOLMENA	515.127.4566
Matthew	Weiss	MWEISS	650.123.1234
Adam	Fripp	AFRIPP	650.123.2234
Payam	Kaufling	PKAUFLIN	650.123.3234
Shanta	Vollman	SVOLLMAN	650.123.4234
Kevin	Mourgos	KMOURGOS	650.123.5234
Julia	Nayer	JNAYER	650.124.1214
Irene	Mikkilineni	IMIKKILI	650.124.1224
James	Landry	JLANDRY	650.124.1334
Steven	Markle	SMARKLE	650.124.1434

If input data is required an input panel will display:



Parameter Entry

employeeid:

Ok Cancel

To run reports standalone you would call a url similar to the following:

`http://<reportserver>/runreport/<ormid>.<groupname>.<reportname>`

for example:

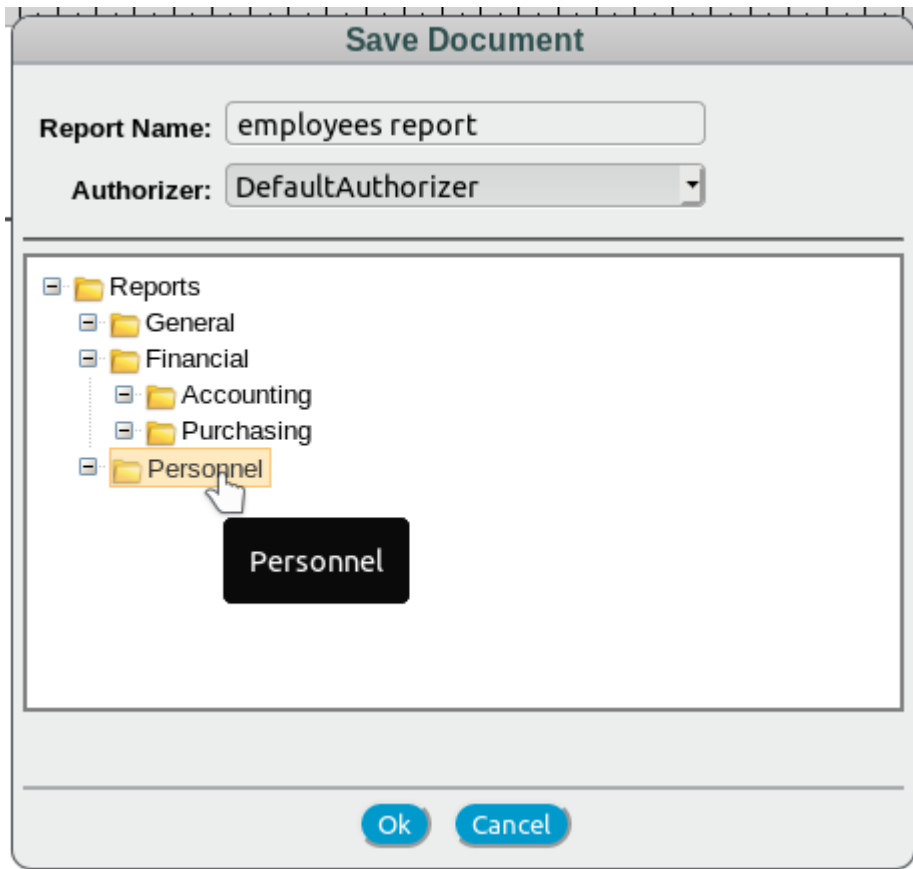
Report Designer

<http://localhost/runreport/hr.grp5.employees>

User login and/or parameter entry panels will display if required.

Saving a Report

To save a report click the **save** icon  to display the **Save Document** panel:



Update report name and authorizer if desired then select group for the report and click **Ok** to save.

Load an Existing Report

To load an existing report left click the desired report in the report tree and select **Load Report** from the popup menu:

