Managing Reports in the Report Center

Overview

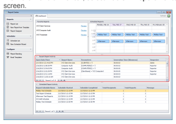
This page guides you through the process of viewing recent report activity, viewing scheduled report activity, previewing a report, viewing existing schedules and building filters to fine-tune the report details. For information on creating new reports, creating or modifying schedules, adding reports to favorites or creating or modifying email templates, please refer to Configuring the Report Center.

View Recent Report Activity

The Recent Report Activity section of the Dashboard provides a detailed list of each time a report is opened. It displays the open date and time, report name, parameters, generation time, and the requester.

To view the recent report activity:

1. From the **Control Center**, select **Tools** > **Report Center**. The **Report Center** displays the **Dashboard** screen.



Tip: Double-click on the report to preview. If the report selected does not have a client filter applied to the report, you are prompted to confirm opening, as it may take several minutes for the report to process. Click **Yes** to continue without a client filter or No to cancel.

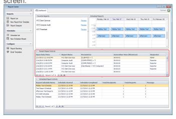
Column	Description
Open Date/Time	This column displays the date and time a report was opened.
Report Name	This column displays the name of the opened report. Since favorite reports can only be viewed by the creator, this column only lists the name of the originating report.
Parameters	This column displays the filter parameters that have been applied to the report.
Generation TIme (hh:mm:ss)	This column displays the amount of time it takes for the report to generate using the hours:minutes:seconds format.
Requester	This column displays the name of the user or the client contact that opened the report.

View Scheduled Report Activity

The Scheduled Report Activity of the Dashboard displays schedule information for scheduled reports: report schedule name, the date and time the schedule started and completed, the total count of recipients, the number of reports, and any message associated to the scheduled report activity.

To view the scheduled report activity:

1. From the **Control Center**, select **Tools** > **Report Center**. The **Report Center** displays the **Dashboard** screen.



The scheduled report activity can be viewed in the Scheduled Report Activity section or from the Scheduled Reports section of the screen.

Column	Description
Report Schedule Name	This column displays the name of the scheduled report.
Schedule Started	This column displays the scheduled start date/time for the selected report.
Schedule Completed	This column displays the scheduled completion date/time the report finished.
Total Recipients	This column displays the number of recipients receiving the specified report.
Total Reports	This column displays the number of reports scheduled.
Message	This column displays any message associated with the scheduled report activity.

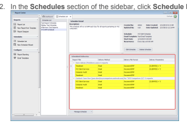
Tip: In the **Scheduled Reports** section, you can right-click on the calendar to view a specific day's scheduled activity, in addition to changing the view to a day, work week, week, month or timeline view. Double-click on an entry to open the Schedule Detail and Scheduled Deliveries.

View Existing Schedules

While reports can be generated manually, schedules remove the burden of generating a collection of reports and conveniently deliver those reports. Schedules can be configured to deliver any report(s) to one or more recipients at any time or frequency, delivered by email or file. With email, the report is generated and attached to an email message sent to the recipient. The file output generates the file in a specified format and drop that file to a specified mapped directory on the server, where the recipient can later retrieve the file.
Once scheduling has been configured, the schedule detail and scheduled deliveries can be seen on the Scheduled Schedule List screen.

To view an existing schedule:

1. From the **Control Center**, select **Tools** > **Report Center**.
2. In the **Schedules** section of the sidebar, click **Schedule List**.



3. When the **Schedule List** appears, select the desired **Schedule** from the **Schedule List** column. Each schedule, when selected, displays schedule detail and the scheduled deliveries.

A variety of deliveries are highlighted in the example shown above, for two types of recipients. In this example, the schedule contains four reports that are delivered to User: Admin and Contact: Jane Doe by email, as a PDF file attachment.

Each row displaying a recipient contains the recipient's email address and the total number of reports being received for the schedule, as well as a row of detail for each delivery assigned to that recipient.

Each row displaying a delivery contains detail including the report title, delivery method, delivery file format, and the delivery parameter.

Note: Recipients may be configured to receive reports from more than one schedule. The total number of reports being received is for the selected schedule only.

Preview a Report

Reports are available from a variety of locations within the Report Center and utilize the print preview option to display the generated report within the Report Designer. A comprehensive collection of master reports and favorite reports can be accessed from the Report List option, located in the Reports section. However, the most convenient way to view a report when you initially open the Report Center is to select a favorite report from the quick-launch on the Dashboard. This is provided that you have created favorite reports. A favorite report is a filtered view of a master report. For more information on how to create favorite reports, refer to Create a Favorite Report.

Note: Reports can also be viewed from the **Recent Report Activity** section of the **Dashboard**. Double-click on the desired report. If a client filter has not been specified for the report, a notification is displayed indicating that it might take several minutes for the report to display, depending on the amount of data. Click **Yes** to continue or **No** to cancel so a client filter can be added.

Media, iframe, embed and object tags are not supported inside of a PDF.

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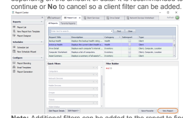
To view the list of available reports:

1. From the **Control Center**, select **Tools** > **Report Center**.
2. In the **Reports** section, click **Report List**. When the **Report List** screen appears, you can view the entire collection of reports available on the **All Reports** tab, or view reports that have been previously customized on the **Favorite Reports** tab.
3. Click on the **All Reports** tab or **Favorite Reports** tab. The All Reports search control conducts a search in any report available from the All Reports tab and displays the results of that search.
4. The **Favorite Reports Search** control conducts a search in any report available from the **Favorite Reports** tab and displays the results of that search.
   Tip: You can also search for a report. The search is conducted for all reports or favorites depending on which screen you are conducting the search form. To do a search, click on the **All Reports** or **Favorites** tab and enter a term for the report in the **Search** field (e.g. computer). Click **Find** to display the results or click **Clear** to clear the entry and re-enter a search term.
5. Select and double-click the desired **Report** or click **View Report**. If a client filter has not been specified for the report, a notification is displayed indicating that it might take several minutes for the report to display, depending on the amount of data. It is recommended to select a client from the **Quick Filters**. Click **Yes** to continue or **No** to cancel so a client filter can be added.



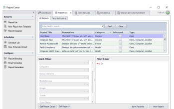
   Note: Additional filters can be added to the report to fine-tune the data it returns using the **Quick Filters** or the **Filter Builder**. For more information on how to create your own filters using the **Filter Builder**, refer to Use the Filter Builder.
6. A Print Preview view of the report appears. Continue with the desired action (e.g., print the report).

Use Filter Builder

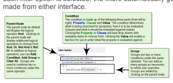
The Filter Builder can be used to create filters that can be used to limit the data to specified criteria. Using logical operators or collection matches, you can create any combination of conditions and groups to refine the customization of a report to your exact needs.

To fine-tune the report results:

1. From the **Report List** in the **Report Center**, highlight the desired report.



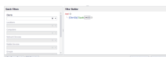
2. In the **Quick Filters** section, select the desired built-in filters (e.g., Clients, Locations, Computers, etc.). As each filter option is selected, the filters automatically generate in the **Filter Builder** section. Changes can be made from either interface.



3. Click on the parent node and select the desired logical operator (e.g., And) or to add a condition or group. Available options are: And, Or, Not And, Not Or, Add Condition, Add Group or Clear All.
4. Once you have chosen the desired logical operator, click on the **Plus Sign** icon to the right to add a condition.
5. Click on the **Property** to select the desired property from a list of available properties (e.g., ClientZip).
6. Click on the **Clause** to select how the property should be evaluated (e.g., Equals).
7. Click on the **Value** to enter the value that it should be evaluated against.
8. Repeat for each desired filter.
9. Click **Set as Favorite** if this is a report that you want to run on a regular basis or click **View Report** to view the results.
   Note: These examples are provided to give you an idea of how to build the filters. Not all examples work for all reports due to the properties available for the selected report.

Example A: Run report for all clients in a specific zip code

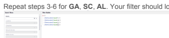
1. Do not select a **Client** in the **Quick Filters** section.
2. Select the **And** logical operator from the parent node.
3. Click the **+** sign to add a new condition.
4. Click the default **Property** and select **ClientZip**.
5. Click the default **Clause** and select **Equals**.
6. Click the **<enter a value>** and enter **33706**. Your filter should look like the following.



7. Click **Save Favorite** if you plan to use this report on a regular basis or click **View Report** to view.

Example B: Run Report for all Clients in your SE Regions (e.g., FL, GA, SC, AL)

1. Do not select a **Client** in the **Quick Filters** section.
2. Select the **Or** logical operator from the parent node.
3. Click the **+** sign to add a new condition.
4. Click the default **Property** and select **ClientLocation**.
5. Click the default **Clause** and select **Equals**.
6. Click the **<enter a value>** and enter **FL**.
7. Repeat steps 3-6 for **GA**, **SC**, **AL**. Your filter should look like the following.



8. Click **Save Favorite** if you plan to use this report on a regular basis or click **View Report** to view.

Example C: Run Report for Dell Server and Workstations, but not Laptops

1. Do not select a **Client** in the **Quick Filters** section.
2. Select the **And** logical operator from the parent node.
3. Click the **+** sign to add a new condition.
4. Click the default **Property** and select **ComputerManufacturer**.
5. Click the default **Clause** and select **Contains**.
6. Click the **<enter a value>** and enter **Dell**.
7. Click on the parent node and select **Add Group**.
8. Click the default **Property** and select **ComputerFormFactor**.
9. Click the default **Clause** and select **Equals**.
10. Click the **<enter a value>** and enter **Server**.
11. Click the **+** sign to add a new condition.
12. Click the default **Property** and select **ComputerFormFactor**.
13. Click the default **Clause** and select **Equals**.
14. Click the **<enter a value>** and enter **Workstation**. Your filter should look like the following.

15. Click **Save Favorite** if you plan to use this report on a regular basis or click **View Report** to view.

Use Report Designer

The Report Designer option of the sidebar opens the Report Designer, which allows you to create new reports from scratch and bind them to data, as well as customize existing reports. In addition to report editing capabilities, it allows you to display its print preview and send its output to a printer or export it to a file on disk. Please refer to Report Designer for more comprehensive instructions on using the Report Designer.