

Report 360

AreaGraph From Multiple Searches

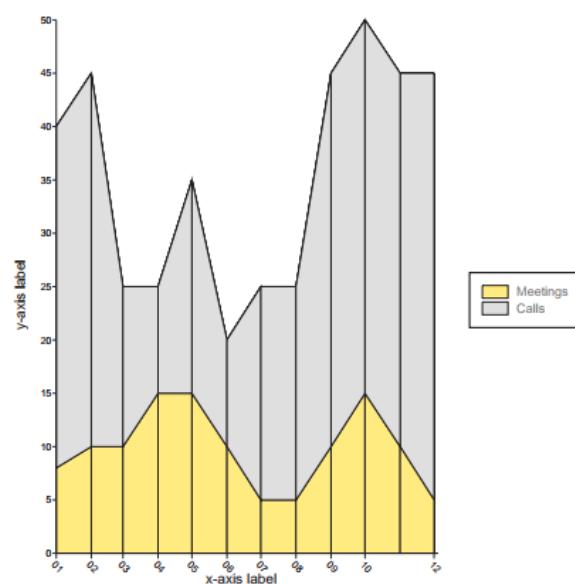


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AREAGRAPH FROM MULTIPLE SEARCHES

In this example we explain how to create an Area Graph that shows budgeted sales activities per month divided by activity type (meetings / phone calls). We will use the area graph for comparison, which is why the activities will not be accumulated in the graph.

1. Create the first Saved search (in this example *budgeted phone calls*).

The Saved Search should only contain two columns (naming standard is VERY important)

- x (always lower case)
- y (always lower case)

The screenshot shows the Report 360 interface with the following details:

- Left Panel (Search Configuration):**
 - Search Title:** Report 360 - Budgeted Calls This Year
 - ID:** customsearch_rep360_budget_calls_year
 - Owner:** Simon Erseus
 - Public:** checked
 - Available as List View:** checked
- Results Tab:**
 - SORT BY:** First date in period (highlighted with a yellow box), DESCENDING
 - THEN BY:** (empty)
 - THEN BY:** (empty)
 - Remove All** and **Add Multiple** buttons
 - Fields Summary:**

FIELD*	SUMMARY TYPE	FUNCTION	FORMULA
Formula (Text)	Group		TO_CHAR((custrecord_avbu_first_date_in_period),'MM') '-' TO_CHAR((custrecord_avbu_first_date_in_period),'MON')
Budget Number	Sum		
 - Output Type:** Normal (highlighted with a yellow box), SHOW TOTALS, MY PREFERRED SEARCH RESULTS
 - When Ordered By Field:** x (highlighted with a yellow box), y (highlighted with a yellow box)
 - Custom Label:** (empty)
 - Custom Label Translation:** (empty)
 - Summary Label:** (highlighted with a yellow box)
- Right Panel (Report Preview):**

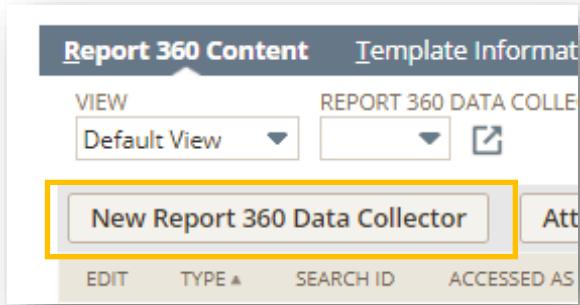
X	Y
01 - JAN	40
02 - FEB	45
03 - MAR	25
04 - APR	25
05 - MAY	35
06 - JUN	20
07 - JUL	25
08 - AUG	25
09 - SEP	45

Notice that in this example the search is a grouped search and therefore the search must have a summary label. If your search result needs to be grouped or summarized in some way (for example sales order amounts summarized) you must use a summary search since the Report 360 Editor and Data Collector does not summarize the data from the search.

If the sorting is of importance do not forget to sort the search.

When the first saved search is completed, simply repeat this procedure and create the second saved search including results for *budgeted meetings*.

- Add the Graph in the Data Collector located at the bottom of the Report 360 Editor record.
- The Searches will be added in the next step.



Report 360 Content **Template Information**

VIEW **REPORT 360 DATA COLLECTOR**

New Report 360 Data Collector **Actions**

EDIT **TYPE ▲** **SEARCH ID** **ACCESSED AS**

Report 360 Data Collector

Save | **Cancel** | **Reset** | **Actions**

PARENT Sales Activities per Month - Budget (Area Graph, Multi Search)	RECORD ID
<input type="checkbox"/> INACTIVE	FILTER FIELD
TYPE Graph	FILTER OPERATOR
GRAPH INSTRUCTION Graph Instruction >>	FILTER VALUE
SEARCH ID	FONT FILE
ACCESSED AS salesactivitiesbudget	FONTS SUBTYPE
RECORD TYPE	

Type: Choose *Graph*

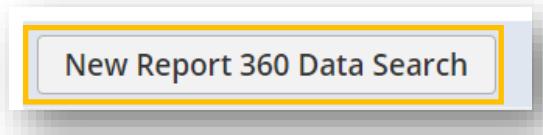
Type of Graph: Choose *AreaGraphMultiSearch*

Accessed As: Set a reference name for this graph (the name that will appear in the Dynamic Tag Library). Must be lower case, only alphabetic without space.

When done you save the record.

- The next step is to add the saved searches to the graph.

To add a saved search, start by opening up the Report 360 Data collector record you have just created and click on the button:



Search: Select the first saved search you have created

Sort Order: Decide the order in which the results will show in the graph. (Number 1 will show at the bottom of the graph (or in the front when not accumulating data in the graph), Number above search 1 etc.)

Accessed As: Set a reference name for this search. The name will appear as a reference in the editor

Filter Field, Filter Operator, Filter Value: The Search result can be limited and dynamic if you use the filter field. To read more about how to use filter field we refer to the User Guide.

Title: The title of the search will be shown in the graph to describe what the search's results show, in this example the budgeted phone calls.

Default Value for Missing Points: If the search is missing results for a specific point in the graph, a default value can be set. If field is empty, 0 is used as default value.

Max Results: To limit the result, set a number, otherwise leave blank.

The screenshot shows the 'Report 360 Data Search' configuration dialog box. It has sections for basic settings (Save, Cancel, Reset, Actions) and detailed search parameters. The detailed parameters include:

- INACTIVE:** A checkbox that is unchecked.
- PARENT:** A dropdown menu showing '596'.
- SEARCH:** A dropdown menu showing 'Report 360 - Budgeted Meetings This Year'.
- SORT ORDER:** A dropdown menu showing '1'.
- ACCESSED AS:** A text input field containing 'meetingsbudget'.
- FILTER FIELD:** An empty text input field.
- FILTER OPERATOR:** An empty text input field.
- FILTER VALUE:** An empty text input field.
- TITLE:** A text input field containing 'Meetings'.
- DEFAULT VALUE FOR MISSING POINTS:** An empty text input field.
- MAX RESULTS:** An empty text input field.

Repeat this procedure to add the second saved search.

4. Add the Area Graph in the layout

Open the Report 360 Editor and place the cursor where you want to insert the graph

```
256  
257  
258  
259 </style>  
260 <!-- Style sheet definitions ends here -->  
261  
262 </head>  
263 <body header="pageheader" header-height="${cHeaderHeight}${Unit}" footer="pagefooter" footer-height="${cFooterHeight}${Unit}"  
264 padding="0" margin="${PMTop} ${PMRight} ${PMBottom} ${PMLeft}" size="A4" >  
265  
266 Sales Activities per Month - Budget <br/>  
267  
268  
269  
270  
271 </body>  
272 </pdf>
```

In the Dynamic Tag Library on the right hand side of the editor you will find **SALESACTIVITIESBUDGET** (name set by *Accessed As*) and **AREAGRAPHMULTISEARCH**.

Double-click on **AREAGRAPHMULTISEARCH** to add the Area Graph code in the editor.

[Save and Preview](#)

```
<!-- Some AreaGraphSingleSearch attributes
display:none;border:none;boxed-right,boxed-top,boxed-left,flat-inner-flat-outen,flat-inner-rotated-outer,rotated-inner-rotated-outer,rotated-inner-flat-outer,flat-outer,rotated-outer
color:yellow;outline:none;outline-style:none;outline-width:0px;
key-font-style:italic;italic,oblique,outline or filled
key-font-weight:bold
color-engine:hue:red,orange,yellow,green,blue,purple,pink,monochrome,random
color-engine:luminosity:bright,light,dark,random
xaxis-formatter:integer(),floatingpoint(min,max),currency(),percentage(),percentage(num),date(MM/dd/yyyy),none
xaxis-formatter-density:normal,sparse,minimal

width="400"
height="400"
align="center"
xaxis-label="x-axis label"
yaxis-label="y-axis label"
display-key="boxed-right"
display-percentage="with%key"
key-size="10px"
key-font-family="Helvetica"
key-font-style="normal"
key-font-weight="normal"
key-font-size="9pt"
keybox-border-color="black"
keybox-color="white"
xaxis-rotate="90"
xaxis-formatter:date(MM/dd/yyyy)
cumulative="false"
color-engine="salesactivitiesbudget:hue:random,luminosity:light"

<if callsbudget?has_content>
<datacurve name="Calls" marker="circle">
<!> callsbudget as item
<sample x="#${item.x}" y="#${item.y}" /></sample>
<#list x="#${item.x}" y="#${item.y}" /></#list>
</datacurve>
</if>
<if meetingsbudget?has_content>
<datacurve name="Meetings" marker="circle">
<!> meetingsbudget as item
<sample x="#${item.x}" y="#${item.y}" /></sample>
<#list x="#${item.x}" y="#${item.y}" /></#list>
</datacurve>
</if>
</areagraph>
</body>
</pdf>
```

Record ID

PARAGRAPH

QR CODE

TABLE

TABLE CELL

TABLE ROW

UNDERLINE

UNORDERED LIST

WATERMARK

SALESACTIVITIESBUDGET

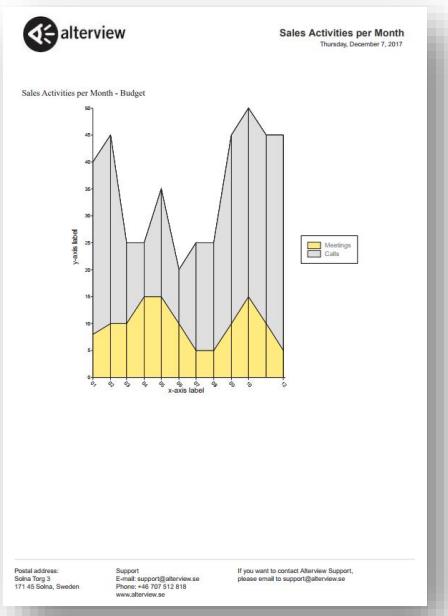
AREAGRAPHMULTISEARCH

HELP

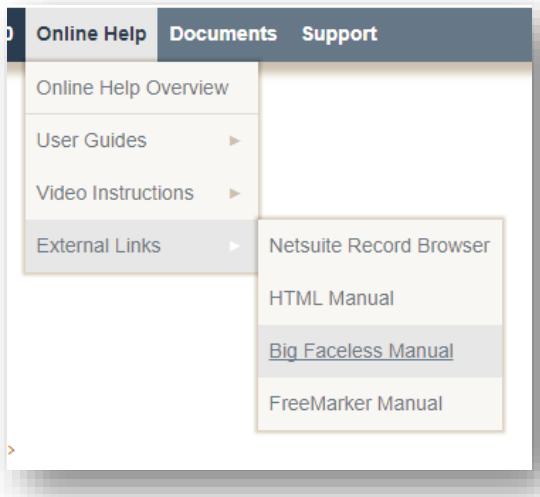
HEADERFOOTER

The Area Graph attributes (orange section) can be altered to change the appearance of the graph. Tips about other useful attributes and alterations of currently used ones will be added automatically above the graph as a comment.

Click on *Save and Preview* to run the Report and view the graph.



To read more about the attributes as well as other useful attributes we refer to *Big Faceless Manual* that you will find in the main menu, under *Online Help*. In the document there is a chapter about *AreaGraphs*.



COLOR ENGINE

One attribute you will not find in the *Big Faceless Manual* is the *Color Engine Attribute*.

```
keybox-color="white"  
color-engine="monthsbestsalesreps:hue=random,luminosity=light"  
>
```

The Color Engine attribute has two parameters

- hue
- luminosity

The default values are

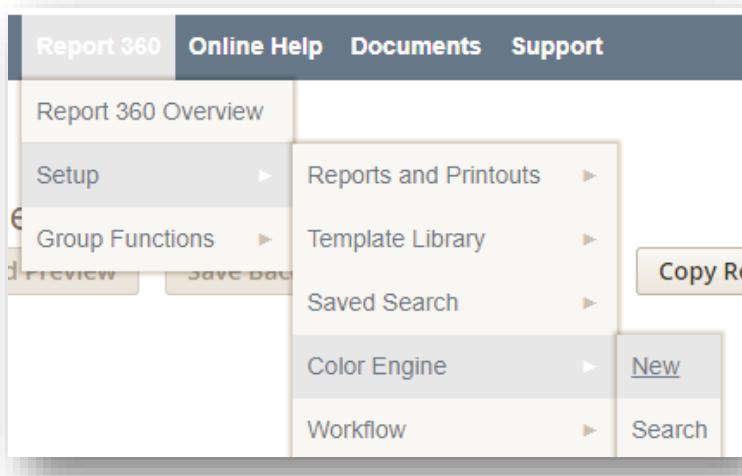
- hue=random
- luminosity=light

As you can see below there are other built-in parameters.

```
color-engine:hue=red,orange,yellow,green,blue,purple,pink,monochrome,random  
color-engine:luminosity=bright,light,dark,random
```

If none of the built-in colors works in your design you have the possibility to add your own colors

Create a New Color Engine – Report 360 – Setup – Color Engine - New



Report 360 Color Engine

Medal

Save ▾ Cancel Reset Actions ▾

NAME *
Medal

VIEW REPORT 360 COLOR ENGINE COLORS
Default View ▾

New Report 360 Color Engine Colors			Attach	Customize View
EDIT	NAME	HEX COLOR CODE	SORT ORDER ▾	
Edit	Gold	#FFD700	1	
Edit	Silver	#C0C0C0	2	
Edit	Bronze	#CD7F32	3	

Save ▾ Cancel Reset Actions ▾

In above example we have created a new color engine named *Medal*.

In the child record Color Engine Colors we have created 3 colors, Gold, Silver Bronze.

For each color you set

Name: Name of color (No space in name)

HEX Color Code: Color code in HEX format

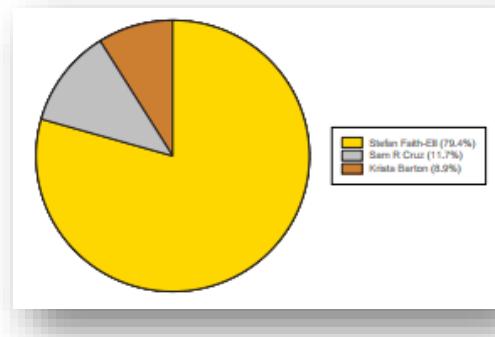
Sort Order: In which order to use the colors. Your graph is based on one or several searches (depending on graph type). If the search is ordered the first hit in the search will have the color with the lowest value. If you leave this field blank the colors will appear in random order.

When the new Color Engine is in place you can update your Color-Engine Attribute in the editor.

```
color-engine="monthsbestsalesreps:hue=Medal,luminosity=bright"
>
```

-hue=Medal (the name is case sensitive)

-luminosity=bright (set bright to get your exact color, if you chose light, it will be lighter, if you chose dark, it will be darker.)



Report 360

AreaGraph From a Single Search

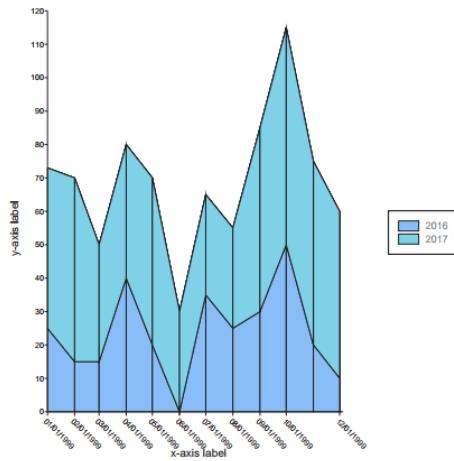


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AREAGRAPH FROM SINGLE SEARCH

In this example we will explain how to create an Area Graph that compares a budget for this year and last fiscal year.

1. Create a Saved Search

The Saved Search should contain three columns (naming standard is VERY important)

- name (*must be lower case*)
- x (*must be lower case*)
- y (*must be lower case*)

Saved AVNS Budget Search

Budget Last Year Compared to Current Year

Save & Run Cancel Reset Preview Change ID

SEARCH TITLE * Budget Last Year Compared to Current Year

ID customsearch_budget_lfyear_vs_cyear

OWNER Simon Erseus

PUBLIC

AVAILABLE AS LIST VIEW

Budget Last Year Compared to Current Year: Results

Edit this Search

FILTERS

NAME	X	TOTAL
2016	1999-03-01	15
2016	1999-08-01	25
2016	1999-07-01	35
2016	1999-11-01	20
2016	1999-02-01	15
2016	1999-05-01	20

Criteria **Results** **Highlighting** **Available Filters** **Audience** **Roles** **Email** **Audit Trail** **Execution Log** **Search Title Translation**

Use this tab to indicate columns to be included in the search results as well as sort order.

SORT BY First date in period DESCENDING

THEN BY DESCENDING

THEN BY DESCENDING

Remove All Add Multiple

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL
:: Formula (Text)	Group	TO_CHAR({custrecord_avbu_first_date_in_period}, 'yyyy')			name		
:: Formula (Text)	Group	'1999-' TO_CHAR({custrecord_avbu_first_date_in_period}, 'mm-dd')			x		
:: Budget Number	Sum				y		

OUTPUT TYPE Normal

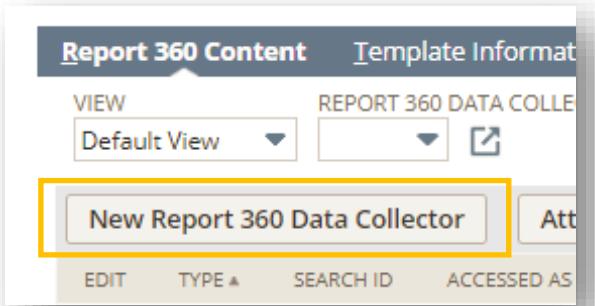
SHOW TOTALS

MY PREFERRED SEARCH RESULTS

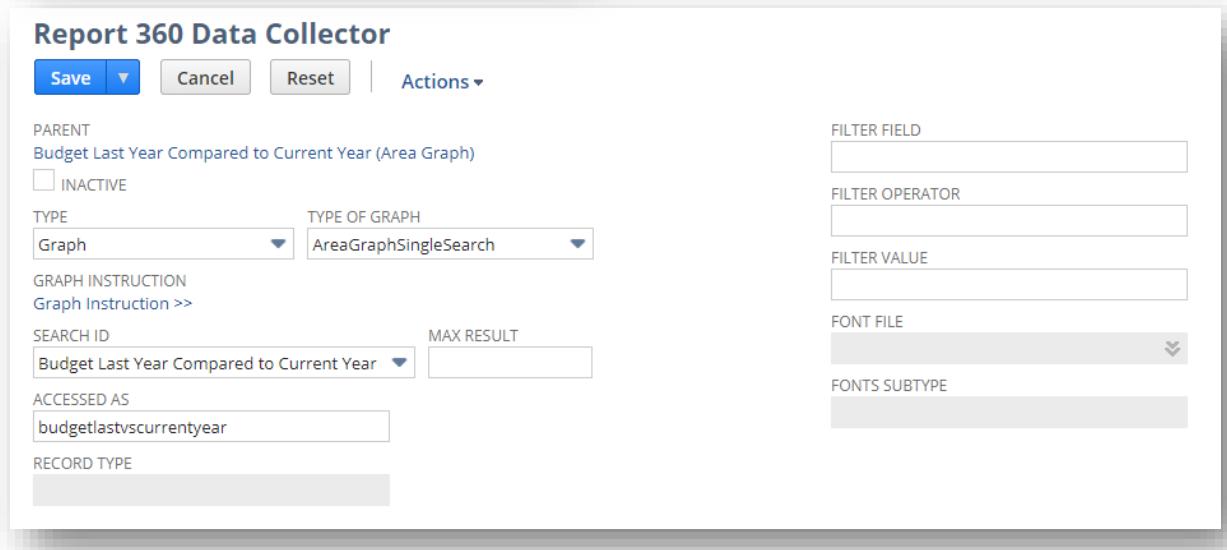
Notice that in this example the search is a grouped search and therefore the search must have a summary label. If your search result needs to be grouped or summarized in some way (for example sales order amounts summarized) you must use a summary search since the Report 360 Editor and Data Collector does not summarize the data from the search.

If the sorting is of importance do not forget to sort the search using *Sort by* as shown above.

- Add the Search and Graph details via the Data Collector located at the bottom of the Report 360 Editor record.



The screenshot shows the 'Report 360 Content' interface. At the top, there are tabs for 'Report 360 Content' and 'Template Information'. Below the tabs, there are buttons for 'VIEW' (Default View) and 'REPORT 360 DATA COLLECTOR'. A yellow box highlights the 'New Report 360 Data Collector' button. At the bottom of the interface, there are buttons for 'EDIT', 'TYPE ▲', 'SEARCH ID', and 'ACCESSED AS'.



The screenshot shows the 'Report 360 Data Collector' configuration dialog. It includes fields for PARENT (set to 'Budget Last Year Compared to Current Year (Area Graph)'), INACTIVE (unchecked), TYPE (set to 'Graph'), and TYPE OF GRAPH (set to 'AreaGraphSingleSearch'). Other fields include GRAPH INSTRUCTION (set to 'Graph Instruction >>'), SEARCH ID (set to 'Budget Last Year Compared to Current Year'), MAX RESULT (empty), ACCESSED AS (set to 'budgetlastvscurrentyear'), RECORD TYPE (empty), FILTER FIELD (empty), FILTER OPERATOR (empty), FILTER VALUE (empty), FONT FILE (empty), and FONTS SUBTYPE (empty). Buttons at the top include 'Save', 'Cancel', 'Reset', and 'Actions ▾'.

Type: Choose *Graph*

Type of Graph: Choose *AreaGraphSingleSearch*

Search ID: Choose the Search that you want to use – In this example *Budget Last Year Compared to Current Year*

Max Result: To limit the result, set a number, otherwise leave blank.

Accessed As: Set a reference name for this graph (the name that will appear in the Dynamic Tag Library). Must be lower case, only alphabetic without space.

Filter Field, Filter Operator, Filter Value: The Search result can be limited and dynamic if you use the filter field. To read more about how to use filter field we refer to the User Guide.

When you are done you save the record.

3. Add the Area Graph in the layout

Open the Report 360 Editor and place the cursor where you want to insert the graph.



- In the Dynamic Tag Library on the right side of the editor you will find **BUDGETLASTVSCURRENTYEAR** (name set by Accessed As) and **AREAGRAPH SINGLE SEARCH**.

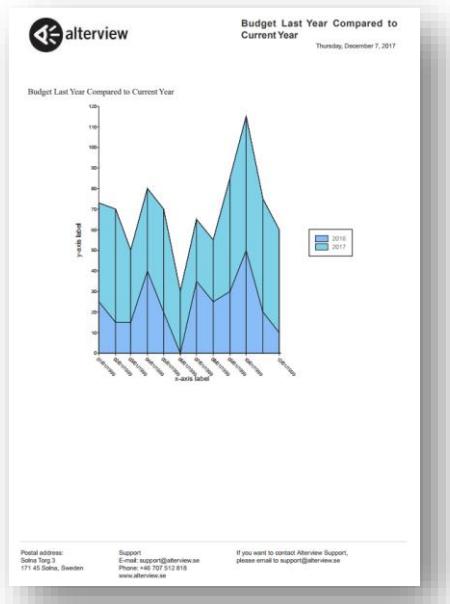
Double-click on **AREAGRAPH SINGLE SEARCH** to add the Area Graph code in the editor.



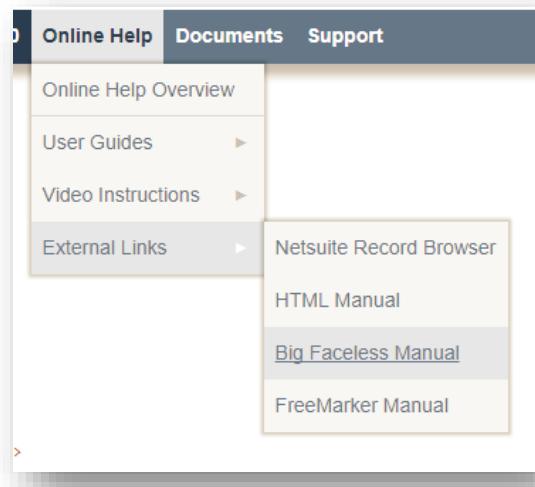
The Area Graph attributes (orange section) can be altered to change the appearance of the graph. Tips about other useful attributes and alternations of currently used ones will be added automatically above the graph as a comment.

One important and useful attribute for the Area Graph is the *cumulative* attribute. By default this attribute is set to “false” which means that the results will not be accumulated. To accumulate the results (similar to a bar graph for example), change this attribute to “true”.

Click on *Save and Preview* to run the Report and view the graph.



To read more about the attributes as well as other useful attributes we refer to *Big Faceless Manual* that you will find in the main menu, under *Online Help*. In the document there is a chapter about *AreaGraphs*.



COLOR ENGINE

One attribute you will not find in the *Big Faceless Manual* is the *Color Engine Attribute*.

```
keybox-color="white"  
color-engine="monthsbestsalesreps:hue=random,luminosity=light"  
>
```

The Color Engine attribute has two parameters

- hue
- luminosity

The default values are

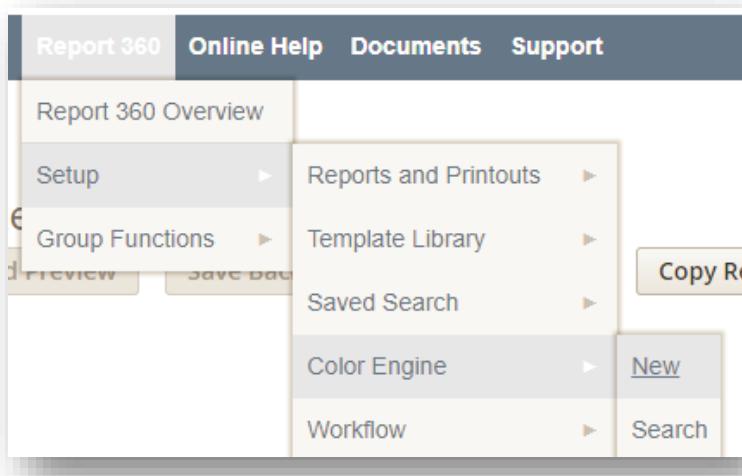
- hue=random
- luminosity=light

As you can see below there are other built-in parameters.

```
color-engine:hue=red,orange,yellow,green,blue,purple,pink,monochrome,random  
color-engine:luminosity=bright,light,dark,random
```

If none of the built-in colors works in your design you have the possibility to add your own colors

Create a New Color Engine – Report 360 – Setup – Color Engine - New



Report 360 Color Engine

← → List Search More

Medal

[Save](#) [Cancel](#) [Reset](#) | [Actions](#)

NAME *

Medal

VIEW REPORT 360 COLOR ENGINE COLORS
Default View

New Report 360 Color Engine Colors			Attach	Customize View
EDIT	NAME	HEX COLOR CODE	SORT ORDER ▲	
Edit	Gold	#FFD700	1	
Edit	Silver	#C0C0C0	2	
Edit	Bronze	#CD7F32	3	

[Save](#) [Cancel](#) [Reset](#) | [Actions](#)

In above example we have created a new color engine named *Medal*.

In the child record Color Engine Colors we have created 3 colors, Gold, Silver Bronze.

For each color you set

Name: Name of color (No space in name)

HEX Color Code: Color code in HEX format

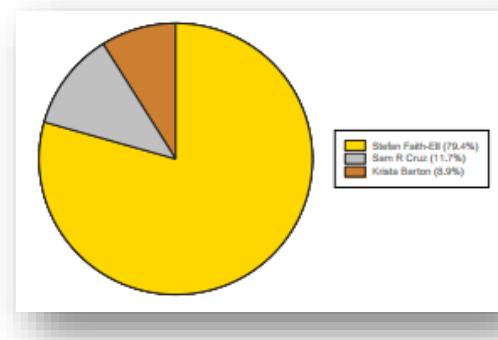
Sort Order: In which order to use the colors. Your graph is based on one or several searches (depending on graph type). If the search is ordered the first hit in the search will have the color with the lowest value. If you leave this field blank the colors will appear in random order.

When the new Color Engine is in place you can update your Color-Engine Attribute in the editor.

```
color-engine="monthsbestsalesreps:hue=Medal,luminosity=bright"
>
```

-hue=Medal (the name is case sensitive)

-luminosity=bright (set bright to get your exact color, if you chose light, it will be lighter, if you chose dark, it will be darker.)



Report 360

PieGraph From a Single Search

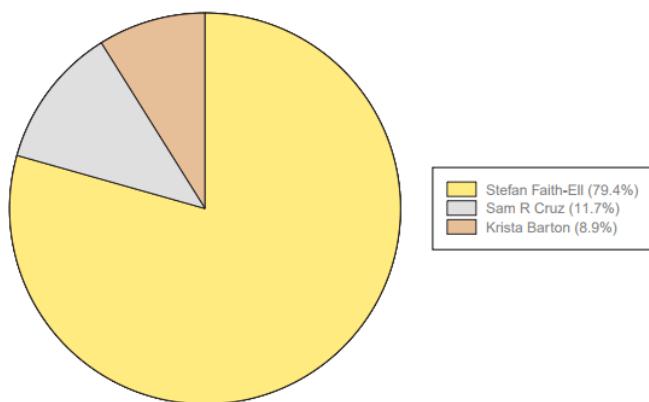


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PIEGRAPH FROM SINGLE SEARCH

In this example we will explain how to create a Pie Graph that lists the 3 best sales reps this month.

1. Create a Saved Search

The Saved Search should only contain two columns (naming standard is VERY important)

- name (*must be lower cases*)
- value (*must be lower cases*)

Saved Transaction Search
Months best sales rep

RESULTS

NAME	VALUE
Stefan Faith-Ell	137,827.54
Sam R Cruz	20,326.70
Krista Barton	15,468.48
Mats Blomqvist	1,147.15
Mark Grogan	1,134.95
Clark Koozer	45.19
Total	175,950.01

FIELD * **SUMMARY TYPE** **FUNCTION** **FORMULA** **WHEN ORDERED BY FIELD**

	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Sales Rep	name			
Amount	value		value	

Notice that in this example the search is a grouped search and therefore the search must have a summary label. If your search result needs to be grouped or summarized in some way (for example sales order amounts summarized) you must use a summary search since the Report 360 Editor and Data Collector does not summarize the data from the search.

If the sorting is of importance do not forget to sort the search using *Sort By* as shown above.

- Add the Search via the Data Collector located at the bottom of the Report 360 Editor record.

The screenshot shows the 'Report 360 Content' interface. At the top, there are 'VIEW' and 'REPORT 360 DATA COLLECTOR' dropdown menus. Below them is a button labeled 'New Report 360 Data Collector', which is highlighted with a yellow box. Further down, there are buttons for 'EDIT', 'TYPE ▲', 'SEARCH ID', and 'ACCESSED AS'. The main area is titled 'Report 360 Data Collector' and contains several input fields and dropdown menus. On the left, under 'PARENT', it says 'Months Best Sales Rep (Pie Graph)' with an 'INACTIVE' checkbox. Under 'TYPE', it says 'Graph' and 'TYPE OF GRAPH' is set to 'PieGraph'. Under 'GRAPH INSTRUCTION', there is a 'SEARCH ID' dropdown containing 'Months best sales rep', a 'MAX RESULT' input field with the value '3', and an 'ACCESSED AS' input field containing 'monthsbestsalesreps'. On the right, there are sections for 'FILTER FIELD', 'FILTER OPERATOR', 'FILTER VALUE', 'FONT FILE' (containing '<Type then tab>'), and 'FONTS SUBTYPE'.

Type: Choose *Graph*

Type of Graph: Choose *PieGraph*

Search ID: Choose the Search that you want to use – In this case *Months Best Sales Rep*

Max Result: To limit the result, set a number, otherwise leave blank. In this example we limit the result to only show top 3 sales rep.

Accessed As: Set a reference name for this graph (the name that will appear in the Dynamic Tag Library). Must be lower case, only alphabetic without space.

Filter Field, Filter Operator, Filter Value: The Search result can be limited and dynamic if you use the filter field. To read more about how to use filter field we refer to the User Guide.

When you are done you save the record.

3. Add the Pie Graph in the layout

Open the Report 360 Editor and place the cursor where you want to insert the graph.



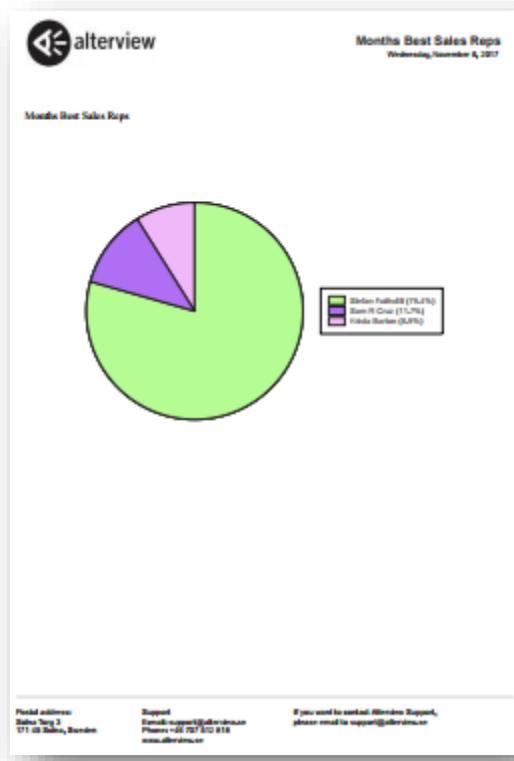
In the Dynamic Tag Library on the right side of the editor you will find the *MONTHSBESTSALESREPS* (name set by *Accessed As*) and *PIEGRAPH*.

Double-click on *PIEGRAPH* to add the Pie Graph code in the editor.

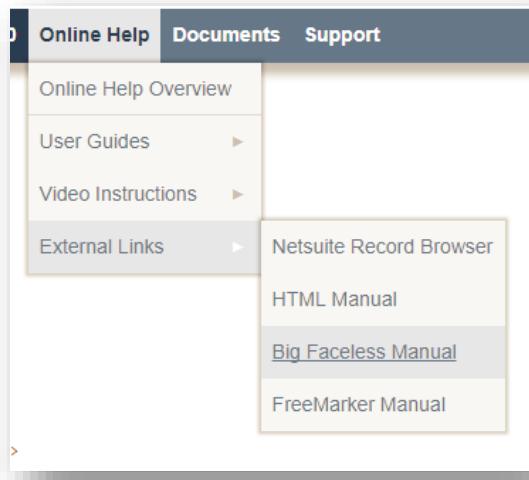
```
266 Months Best Sales Reps <br/>
267
268     <!-- Some Piegraph attributes
269     display-key:none,boxed-bottom,boxed-right,boxed-top,boxed-left,flat-inner-flat-outer,flat-inner-rotated-outer,
270     display-percentage:with-key,inline,none
271     key-font-style:normal,italic,oblique,outline or filled
272     key-font-weight:normal,bold
273     color-engine:hue=red,orange,yellow,green,blue,purple,pink,monochrome,random
274     color-engine:luminosity=bright,light,dark,random
275     -->
276     <piegraph
277         width="400"
278         height="400"
279         align="center"
280         display-key="boxed-right"
281         display-percentage="with-key"
282         key-color="gray"
283         key-font-family="Helvetica"
284         key-font-style="normal"
285         key-font-weight="normal"
286         key-font-size="9pt"
287         keybox-border-color="black"
288         keybox-color="white"
289         color-engine="monthsbestsalesreps:hue=random,luminosity=light"
290     >
291         <#if monthsbestsalesreps?has_content>
292             <#list monthsbestsalesreps as item>
293                 <gdata name="${item.name}" value="${item.value}" color="${item.color}" ></gdata>
294             </#list>
295         </#if>
296     </piegraph>
297
298
299
300     </body>
```

The Pie Graph attributes (orange section) can be altered to change the appearance of the graph. Tips about other useful attributes and alterations of currently used ones will be added automatically above the graph as a comment.

Click on *Save and Preview* to run the Report and view the graph.



To read more about the attributes as well as other useful attributes we refer to *Big Faceless Manual* that you will find in the main menu, under *Online Help*. In the document there is a chapter about *PieGraphs*.



COLOR ENGINE

One attribute you will not find in the *Big Faceless Manual* is the *Color Engine Attribute*.

```
keybox-color="white"  
color-engine="monthsbestsalesreps:hue=random,luminosity=light"  
>
```

The Color Engine attribute has two parameters

- hue
- luminosity

The default values are

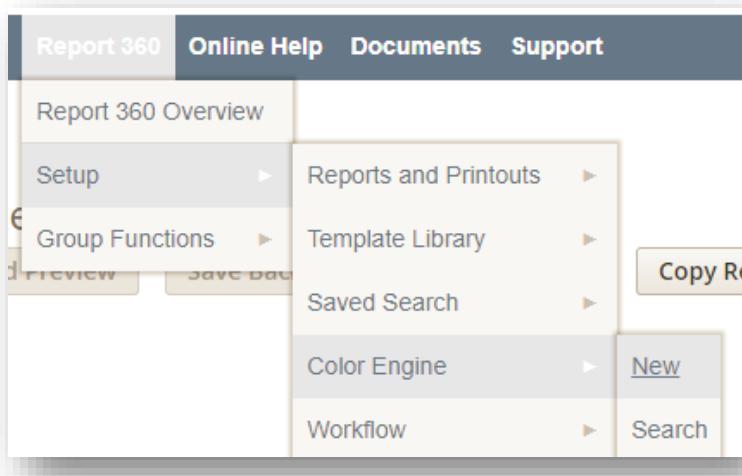
- hue=random
- luminosity=light

As you can see below there are other built-in parameters.

```
color-engine:hue=red,orange,yellow,green,blue,purple,pink,monochrome,random  
color-engine:luminosity=bright,light,dark,random
```

If none of the built-in colors work in your design you have the possibility to add your own colors

Create a New Color Engine – Report 360 – Setup – Color Engine - New



Report 360 Color Engine

Medal

Save ▾ Cancel Reset Actions ▾

NAME *
Medal

VIEW REPORT 360 COLOR ENGINE COLORS
Default View ▾

New Report 360 Color Engine Colors			Attach	Customize View
EDIT	NAME	HEX COLOR CODE	SORT ORDER ▾	
Edit	Gold	#FFD700	1	
Edit	Silver	#C0C0C0	2	
Edit	Bronze	#CD7F32	3	

Save ▾ Cancel Reset Actions ▾

In above example we have created a new color engine named *Medal*.

In the child record Color Engine Colors we have created 3 colors, Gold, Silver Bronze.

For each color you set

Name: Name of color (No space in name)

HEX Color Code: Color code in HEX format

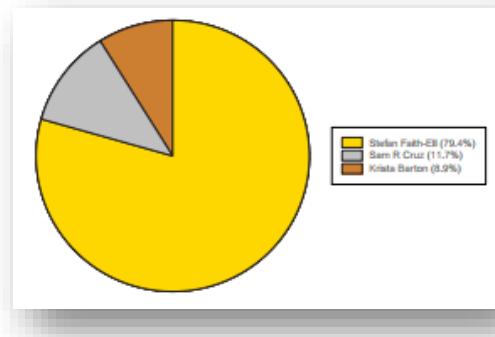
Sort Order: In which order to use the colors. Your graph is based on one or several searches (depending on graph type). If the search is ordered the first hit in the search will have the color with the lowest value. If you leave this field blank the colors will appear in random order.

When the new Color Engine is in place you can update your Color-Engine Attribute in the editor.

```
color-engine="monthsbestsalesreps:hue=Medal,luminosity=bright"
>
```

-hue=Medal (the name is case sensitive)

-luminosity=bright (set bright to get your exact color, if you chose light, it will be lighter, if you chose dark, it will be darker.)



Report 360

LineGraph From Multiple Searches

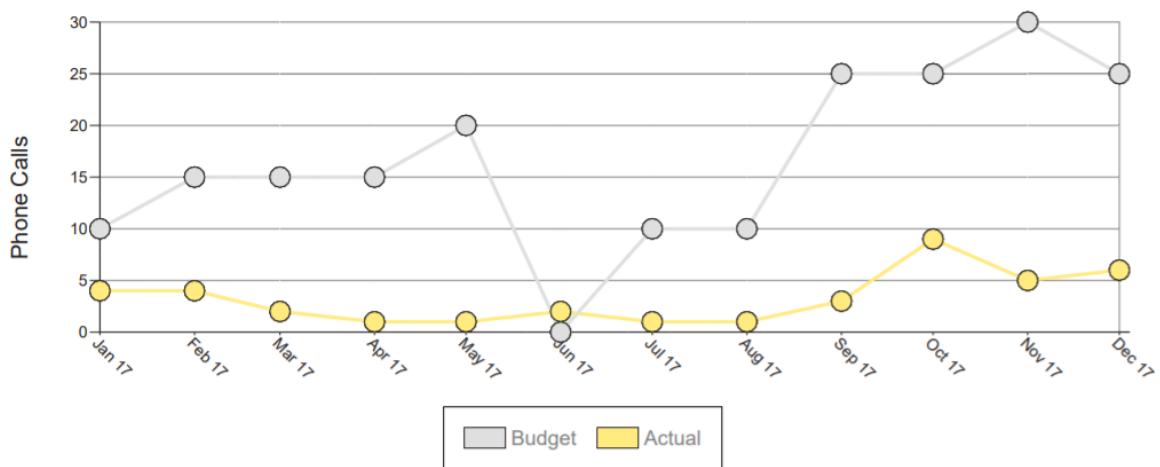


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LINEGRAPH FROM MULTIPLE SEARCHES

In this example we will explain how to create a Line Graph that lists the actual phone calls made compared to budgeted phone calls for one year.

1. Create the first Saved Search (in this example *budgeted phone calls*).

The Saved Search should only contain two columns (naming standard is VERY important)

- x (always lower case)
- y (always lower case)

The screenshot shows a 'Results' tab selected in a search interface. The table has two columns: 'X' and 'Y'. The 'X' column contains dates from 2017-01-01 to 2017-09-01. The 'Y' column contains values 10, 15, 15, 15, 15, 20, 0, 10, 10, 25. At the bottom of the table, there is a section labeled 'CUSTOM LABEL' with entries 'x' and 'y'. A yellow box highlights this section.

X	Y
2017-01-01	10
2017-02-01	15
2017-03-01	15
2017-04-01	15
2017-05-01	20
2017-06-01	0
2017-07-01	10
2017-08-01	10
2017-09-01	25

CUSTOM LABEL

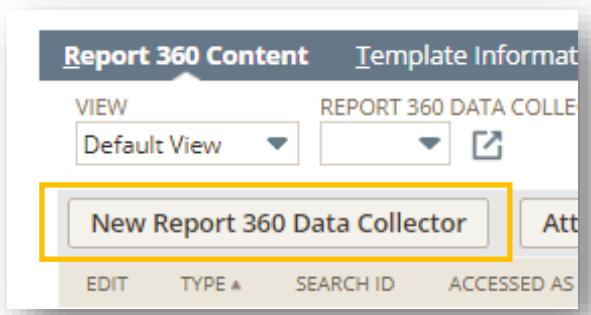
FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUS
:: Formula (Text)	Group		TO_CHAR({custrecord_avbu_first_date_in_period}, 'yyyy-mm-dd')	x	x	
:: Budget Number	Group			y	y	
:: Employee						

Please note that if you are creating a summary saved search, summary labels must be used. In this example we only use the summary type = 'Group' which is why a Custom label will suffice.

If the sorting is of importance do not forget to sort the search.

When the first saved search is completed, simply repeat this procedure and create the second saved search including results for *actual phone calls made*. Make sure that the type and formatting of the values used in the 'x' and 'y' columns match each respective counterpart in the other saved search.

- Add the Graph details via the Data Collector located at the bottom of the Report 360 Editor record. The Searches will be added in the next step.



The dialog box is titled 'Report 360 Data Collector'. It contains several input fields and dropdown menus:

- PARENT:** AVNS Budget
- INACTIVE:**
- TYPE:** Graph
- TYPE OF GRAPH:** LineGraphMultiSearch
- GRAPH INSTRUCTION:** Graph Instruction >>
- SEARCH ID:** (dropdown menu)
- ACCESSION AS:** phonecalls
- RECORD ID:** (dropdown menu)
- FILTER FIELD:** (dropdown menu)
- FILTER OPERATOR:** (dropdown menu)
- FILTER VALUE:** (dropdown menu)
- FONT FILE:** (dropdown menu)
- FONTS SUBTYPE:** (dropdown menu)

Type: Choose *Graph*

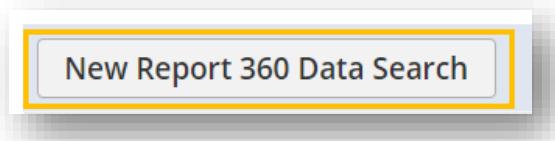
Type of Graph: Choose *LineGraphMultiSearch*

Accessed As: Set a reference name for this graph (the name that will appear in the Dynamic Tag Library). Must be lower case, only alphabetic without space.

When you are done you save the record.

- The next step is to add the saved searches to the graph.

To add a saved search, start by opening up the Data collector record you have just created and click on the button:



Search: Select the first saved search you have created

Sort Order: Decide the order in which the results will show in the graph

Accessed As: Set a reference name for this search. The name will appear as a reference in the editor

Filter Field, Filter Operator, Filter Value: The Search result can be limited and dynamic if you use the filter field. To read more about how to use filter field we refer to the *User Guide*.

Title: The title of the search will be shown in the graph to describe what the search's results show, in this example the budgeted phone calls.

Default Value for Missing Points: If the search is missing results for a specific point in the graph, a default value can be set. If field is empty, 0 is used as default value.

Max Results: To limit the result, set a number, otherwise leave blank.

The screenshot shows the "Report 360 Data Search" configuration screen. At the top, there are buttons for "Save", "Cancel", "Reset", and "Actions". Below these are several input fields and dropdown menus. On the left, there is a section for "SEARCH" containing a dropdown menu set to "PDF - AVNS Budget - Phone Calls". There is also a "PARENT" field with the value "376" and an "INACTIVE" checkbox. On the right, there are four main sections: "ACCESSION AS" (set to "budgetphonecall"), "FILTER FIELD" (set to "custrecord_avbu_employee"), "FILTER OPERATOR" (set to "is"), and "FILTER VALUE" (set to "{id}"). Further down, there are sections for "TITLE" (containing "MASTER SEARCH" with a checked checkbox), "DEFAULT VALUE FOR MISSING POINTS" (empty), and "MAX RESULTS" (empty).

Repeat this procedure to add the second saved search.

4. Add the Line Graph in the layout

Open the Report 360 Editor and place the cursor where you want to insert the graph.



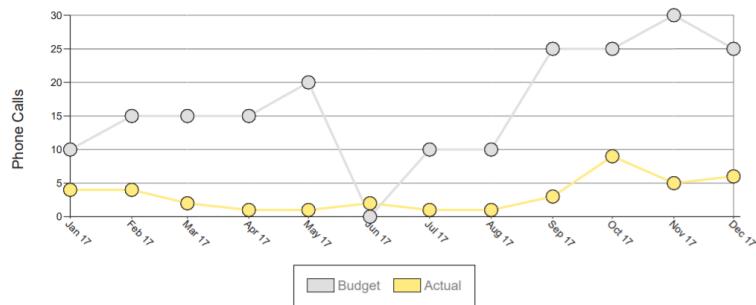
In the Dynamic Tag Library on the right side of the editor you will find *PHONECALLS* (name set by Accessed As) and *LINEGRAPHMULTISEARCH*.

Double-click on *LINEGRAPHMULTISEARCH* to add the Line Graph code in the editor.

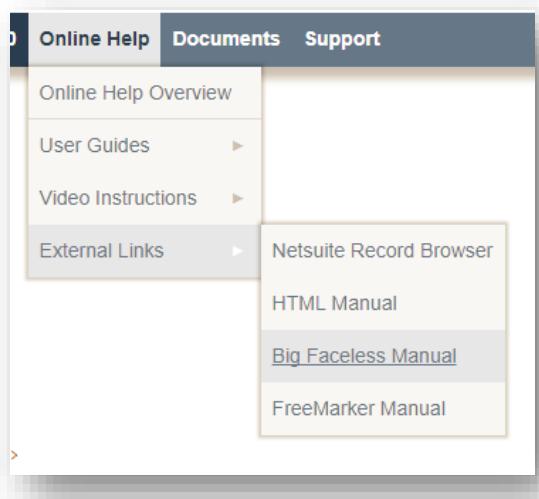
```
1059 <!-- Some Linegraph attributes
1060 display-key:none,boxed-bottom,boxed-right,boxed-top,boxed-left,flat-inner-flat-outer,flat-inner-rotated-outer,rotated-inner-rotated-outer,rotated-inner-flat-outer,flat-outer,rotated-outer
1061 display-percentage:with-key,inline:none
1062 key-font-style:normal,italic,oblique,outline or filled
1063 key-font-weight:normal:bold
1064 color-engine:hue=red,orange,yellow,green,blue,purple,pink,monochrome,random
1065 color-engine:luminosity=bright,light,dark,random
1066 xaxis-formatter:integer(),floatingpoint(),floatingpoint(min,max),currency(),percentage(),percentage(num),date(),date(##/##/####),none
1067 xaxis-formatter-density:normal,sparse,minimal
1068 zwall-color:white,gray
1069 zwall-border-color:gray,black
1070 zwall-grid:horizontal,vertical
1071 * </linegraph>
1072 width="400"
1073 height="400"
1074 align="center"
1075 display-key="boxed-right"
1076 display-percentage="with-key"
1077 key-color="gray"
1078 key-font-family="Helvetica"
1079 key-font-style="normal"
1080 key-font-weight="normal"
1081 key-font-size="9pt"
1082 keybox-border-color="black"
1083 keybox-color="white"
1084 xaxis-label="x-axis label"
1085 yaxis-label="y-axis label"
1086 xaxis-rotate="45"
1087 xaxis-formatter="date(##/##/####)"
1088 color-engine="phonecalls:hue=random,luminosity=light"
1089
1090 <if budgetphonecall?has_content>
1091 *   <datcurve name="Budget" marker="circle" >
1092     <#list budgetphonecall as item>
1093       <sample x="${item.x}" y="${item.y}" ></sample>
1094     </#list>
1095   </datcurve>
1096 </if>
1097 <if actualphonecall?has_content>
1098   <datcurve name="Actual" marker="circle" >
1099     <#list actualphonecall as item>
1100       <sample x="${item.x}" y="${item.y}" ></sample>
```

The Line Graph attributes (orange section) can be altered to change the appearance of the graph. Tips about other useful attributes and alterations of currently used ones will be added automatically above the graph as a comment.

Click on *Save and Preview* to run the Report and view the graph.



To read more about the attributes as well as other useful attributes we refer to *Big Faceless Manual* that you will find in the main menu, under *Online Help*. In the document there is a chapter about *LineGraphs*.



COLOR ENGINE

One attribute you will not find in the *Big Faceless Manual* is the *Color Engine Attribute*.

```
keybox-color="white"  
color-engine="monthsbestsalesreps:hue=random,luminosity=light"  
>
```

The Color Engine attribute has two parameters

- hue
- luminosity

The default values are

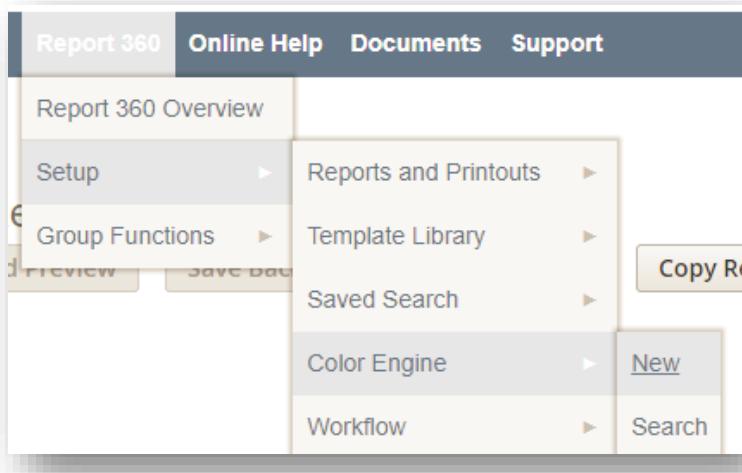
- hue=random
- luminosity=light

As you can see below there are other built-in parameters.

```
color-engine:hue=red,orange,yellow,green,blue,purple,pink,monochrome,random  
color-engine:luminosity=bright,light,dark,random
```

If none of the built-in colors works in your design you have the possibility to add your own colors

Create a New Color Engine – Report 360 – Setup – Color Engine - New



Report 360 Color Engine

Medal

Save ▾ Cancel Reset Actions ▾

NAME *
Medal

VIEW REPORT 360 COLOR ENGINE COLORS
Default View ▾

New Report 360 Color Engine Colors			Attach	Customize View
EDIT	NAME	HEX COLOR CODE	SORT ORDER ▾	
Edit	Gold	#FFD700	1	
Edit	Silver	#C0C0C0	2	
Edit	Bronze	#CD7F32	3	

Save ▾ Cancel Reset Actions ▾

In above example we have created a new color engine named *Medal*.

In the child record Color Engine Colors we have created 3 colors, Gold, Silver Bronze.

For each color you set

Name: Name of color (No space in name)

HEX Color Code: Color code in HEX format

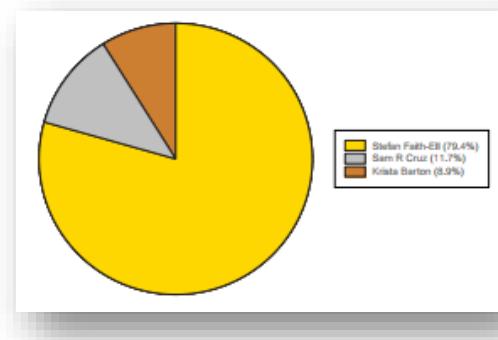
Sort Order: In which order to use the colors. Your graph is based on one or several searches (depending on graph type). If the search is ordered the first hit in the search will have the color with the lowest value. If you leave this field blank the colors will appear in random order.

When the new Color Engine is in place you can update your Color-Engine Attribute in the editor.

```
color-engine="monthsbestsalesreps:hue=Medal,luminosity=bright"
>
```

-hue=Medal (the name is case sensitive)

-luminosity=bright (set bright to get your exact color, if you chose light, it will be lighter, if you chose dark, it will be darker.)



Report 360

LineGraph From a Single Search

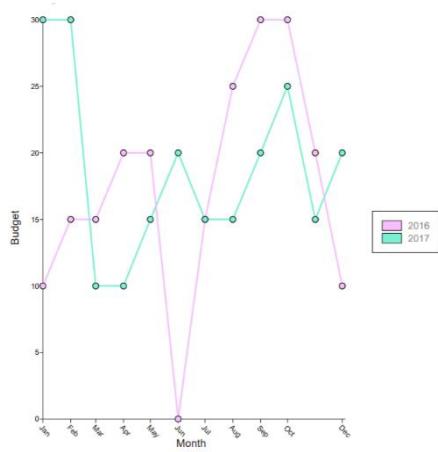


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LINEGRAPH FROM SINGLE SEARCH

In this example we will explain how to create a Line Graph that compares a budget for this year and last fiscal year.

1. Create a Saved Search

The Saved Search should contain three columns (naming standard is VERY important)

- name (*must be lower case*)
- x (*must be lower case*)
- y (*must be lower case*)

Saved AVNS Budget Search

Budget Last Year Compared to Current Year

Save & Run Cancel Reset | Preview | Change ID

SEARCH TITLE *
Budget Last Year Compared to Current Year

ID
customsearch_budget_lfyear_vs_cyear

OWNER
Simon Erseus

PUBLIC

AVAILABLE AS LIST VIEW

Criteria **Results** **Highlighting** **Available Filters** **Audience** **Roles** **Email** **Audit Trail** **Execution Log** **Search Title Translation**

Use this tab to indicate columns to be included in the search results as well as sort order.

SORT BY
First date in period DESCENDING

THEN BY
 DESCENDING

THEN BY
 DESCENDING

Remove All **Add Multiple**

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL
:: Formula (Text)	Group		TO_CHAR({custrecord_avbu_first_date_in_period}, 'yyyy')		name		
:: Formula (Text)	Group		'1999-' TO_CHAR({custrecord_avbu_first_date_in_period}, 'mm-dd')		x		
:: Budget Number	Sum				y		

Budget Last Year Compared to Current Year: Results

Edit this Search | FILTERS

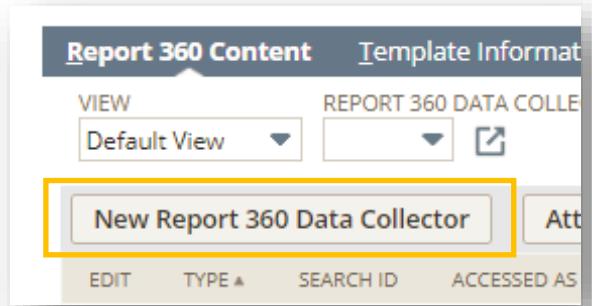
NAME *	X	Y
2016	1999-03-01	15
2016	1999-08-01	25
2016	1999-07-01	35
2016	1999-11-01	20
2016	1999-02-01	15
2016	1999-05-01	20

List Search Audit Trail

Notice that in this example the search is a grouped search and therefore the search must have a summary label. If your search result needs to be grouped or summarized in some way (for example sales order amounts summarized) you must use a summary search since the Report 360 Editor and Data Collector does not summarize the data from the search.

If the sorting is of importance do not forget to sort the search using *Sort by* as shown above.

- Add the Search and Graph details via the Data Collector located at the bottom of the Report 360 Editor record.



The screenshot shows the 'Report 360 Content' interface. At the top, there are tabs for 'Report 360 Content' and 'Template Information'. Below the tabs, there are dropdown menus for 'VIEW' (set to 'Default View') and 'REPORT 360 DATA COLLECTOR' (with a dropdown arrow). A yellow box highlights the 'New Report 360 Data Collector' button. Below these are buttons for 'EDIT', 'TYPE ▲', 'SEARCH ID', and 'ACCESSED AS'. The main area is titled 'Report 360 Data Collector' and contains the following fields:

PARENT	Budget Last Year Compared to Current Year (Line Graph)	FILTER FIELD
<input type="checkbox"/> INACTIVE		FILTER OPERATOR
TYPE	TYPE OF GRAPH	FILTER VALUE
Graph	LineGraphSingleSearch	FONT FILE
GRAPH INSTRUCTION		FONTS SUBTYPE
Graph Instruction >>		
SEARCH ID	MAX RESULT	
Budget Last Year Compared to Current Year		
ACCESSED AS		
budgetlastvscurrentyear		
RECORD TYPE		

Type: Choose *Graph*

Type of Graph: Choose *LineGraphSingleSearch*

Search ID: Choose the Search that you want to use – In this example *Budget Last Year Compared to Current Year*

Max Result: To limit the result, set a number, otherwise leave blank.

Accessed As: Set a reference name for this graph (the name that will appear in the Dynamic Tag Library). Must be lower case, only alphabetic without space.

Filter Field, Filter Operator, Filter Value: The Search result can be limited and dynamic if you use the filter field. To read more about how to use filter field we refer to the User Guide.

When you are done you save the record.

3. Add the Line Graph in the layout

Open the Report 360 Editor and place the cursor where you want to insert the graph.



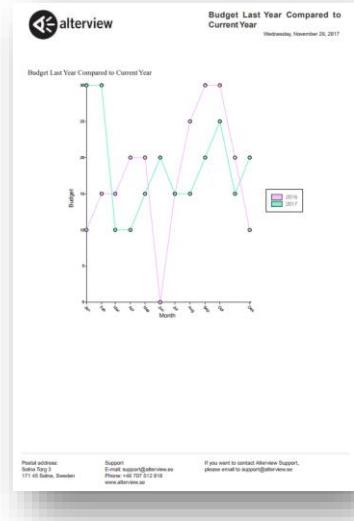
4. In the Dynamic Tag Library on the right side of the editor you will find *BUDGETLASTVSCURRENTYEAR* (name set by Accessed As) and *LINEGRAPHSSINGLESEARCH*.

Double-click on *LINEGRAPHSSINGLESEARCH* to add the Line Graph code in the editor.

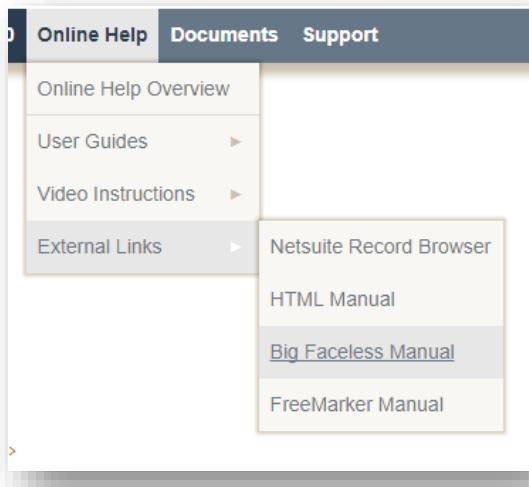


The Line Graph attributes (orange section) can be altered to change the appearance of the graph. Tips about other useful attributes and alternations of currently used ones will be added automatically above the graph as a comment.

Click on **Save and Preview** to run the Report and view the graph.



To read more about the attributes as well as other useful attributes we refer to *Big Faceless Manual* that you will find in the main menu, under *Online Help*. In the document there is a chapter about *LineGraphs*.



COLOR ENGINE

One attribute you will not find in the *Big Faceless Manual* is the *Color Engine Attribute*.

```
keybox-color="white"  
color-engine="monthsbestsalesreps:hue=random,luminosity=light"  
>
```

The Color Engine attribute has two parameters

- hue
- luminosity

The default values are

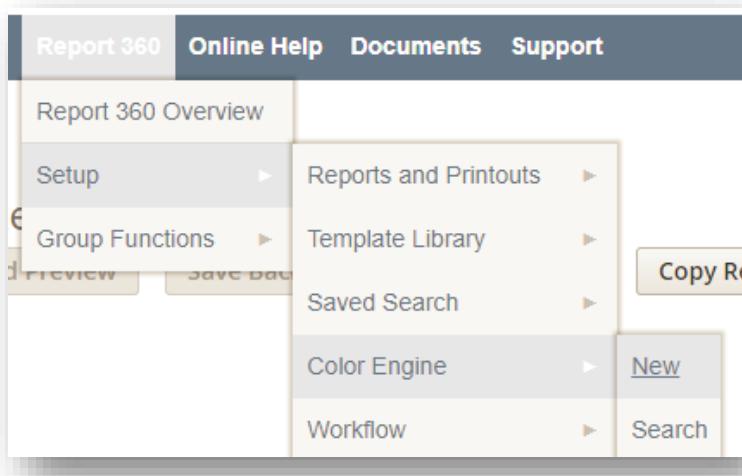
- hue=random
- luminosity=light

As you can see below there are other built-in parameters.

```
color-engine:hue=red,orange,yellow,green,blue,purple,pink,monochrome,random  
color-engine:luminosity=bright,light,dark,random
```

If none of the built-in colors works in your design you have the possibility to add your own colors

Create a New Color Engine – Report 360 – Setup – Color Engine - New



Report 360 Color Engine

Medal

Save Cancel Reset Actions ▾

NAME *
Medal

VIEW REPORT 360 COLOR ENGINE COLORS
Default View ▾

New Report 360 Color Engine Colors			Attach	Customize View
EDIT	NAME	HEX COLOR CODE	SORT ORDER ▾	
Edit	Gold	#FFD700	1	
Edit	Silver	#C0C0C0	2	
Edit	Bronze	#CD7F32	3	

Save Cancel Reset Actions ▾

In above example we have created a new color engine named *Medal*.

In the child record Color Engine Colors we have created 3 colors, Gold, Silver Bronze.

For each color you set

Name: Name of color (No space in name)

HEX Color Code: Color code in HEX format

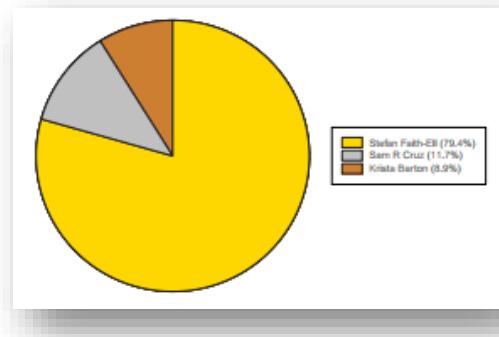
Sort Order: In which order to use the colors. Your graph is based on one or several searches (depending on graph type). If the search is ordered the first hit in the search will have the color with the lowest value. If you leave this field blank the colors will appear in random order.

When the new Color Engine is in place you can update your Color-Engine Attribute in the editor.

```
color-engine="monthsbestsalesreps:hue=Medal,luminosity=bright"
>
```

-hue=Medal (the name is case sensitive)

-luminosity=bright (set bright to get your exact color, if you chose light, it will be lighter, if you chose dark, it will be darker.)



Report 360

BarGraph From a Single Search

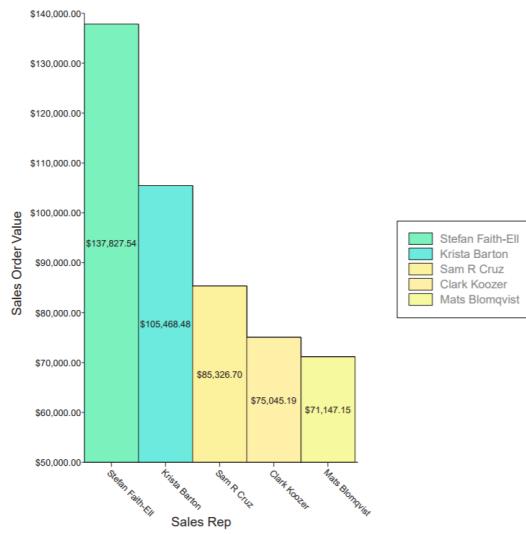


Table of Content:

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BARGRAPH FROM SINGLE SEARCH

In this example we will explain how to create a Bar Graph that lists the 5 best sales reps this month.

1. Create a Saved Search

The Saved Search should only contain two columns (naming standard is VERY important)

- name (*must be lower case*)
- value (*must be lower case*)

Saved Transaction Search
Months best sales rep

SEARCH TITLE *
Months best sales rep

ID
customsearch_pdf_montsh_best_sales_rep

OWNER
Daniel Sernbo

PUBLIC
 AVAILABLE AS LIST VIEW

SORT BY
Amount DESCENDING

THEN BY
 DESCENDING

THEN BY
 DESCENDING

Remove All **Add Multiple**

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
⋮ Sales Rep	Group				name			
⋮ Amount	Sum				value		value	

Months best sales rep: Results

NAME	VALUE
Stefan Faith-Ell	137,827.54
Krista Barton	105,468.48
Sam R Cruz	85,326.70
Clark Koozer	75,046.19
Mats Blomqvist	71,147.15
Mark Grogan	1,134.95
Total	475,950.01

Notice that in this example the search is a grouped search and therefore the search must have a summary label. If your search result needs to be grouped or summarized in some way (for example sales order amounts summarized) you must use a summary search since the Report 360 Editor and Data Collector does not summarize the data from the search.

If the sorting is of importance do not forget to sort the search using *Sort by* as shown above.

2. Add the Search and Graph details via the Data Collector located at the bottom of the Report 360 Editor record.

The screenshot shows the 'Report 360 Content' interface. At the top, there are tabs for 'Report 360 Content' and 'Template Information'. Below the tabs, there are buttons for 'VIEW' (Default View) and 'REPORT 360 DATA COLLECTOR'. A yellow box highlights the 'New Report 360 Data Collector' button. At the bottom of the interface, there are buttons for 'EDIT', 'TYPE ▲', 'SEARCH ID', and 'ACCESSED AS'.

Report 360 Data Collector

Save ▾ Cancel Reset | Actions ▾

PARENT
Months Best Sales Rep (Bar Graph)
 INACTIVE

TYPE
Graph ▾ TYPE OF GRAPH
BarGraphSingleSearch ▾

GRAPH INSTRUCTION
Graph Instruction >>

SEARCH ID
Months best sales rep ▾ MAX RESULT
5

ACCESSED AS
monthsbestsalesreps

RECORD TYPE

FILTER FIELD
[empty input field]

FILTER OPERATOR
[empty input field]

FILTER VALUE
[empty input field]

FONT FILE
[empty input field] ▾

FONTS SUBTYPE
[empty input field]

Type: Choose *Graph*

Type of Graph: Choose *BarGraphSingleSearch*

Search ID: Choose the Search that you want to use – In this example *Months Best Sales Rep*

Max Result: To limit the result, set a number, otherwise leave blank. In this example we limit the result to only show the top 5 sales rep.

Accessed As: Set a reference name for this graph (the name that will appear in the Dynamic Tag Library). Must be lower case, only alphabetic without space.

Filter Field, Filter Operator, Filter Value: The Search result can be limited and dynamic if you use the filter field. To read more about how to use filter field we refer to the User Guide.

When you are done you save the record.

3. Add the Bar Graph in the layout

Open the Report 360 Editor and place the cursor where you want to insert the graph.



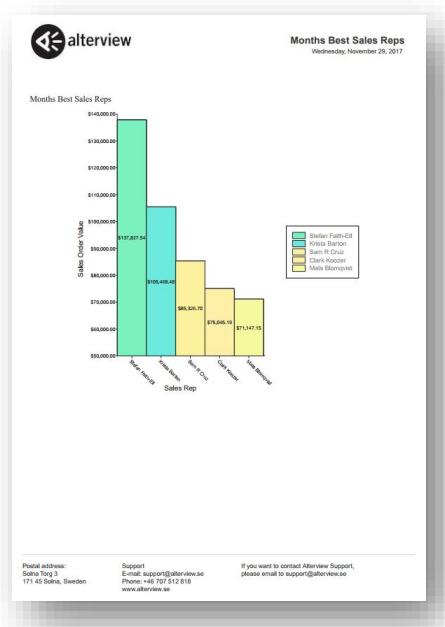
4. In the Dynamic Tag Library on the right side of the editor you will find *MONTHSBESTSALESREPS* (name set by Accessed As) and *BARGRAPHSSINGLESEARCH*.

Double-click on *BARGRAPHSSINGLESEARCH* to add the Bar Graph code in the editor.

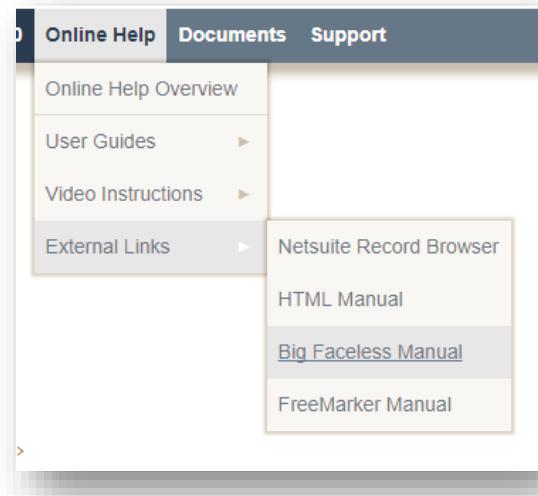


The Bar Graph attributes (orange section) can be altered to change the appearance of the graph. Tips about other useful attributes and alterations of currently used ones will be added automatically above the graph as a comment.

Click on *Save and Preview* to run the Report and view the graph.



To read more about the attributes as well as other useful attributes we refer to *Big Faceless Manual* that you will find in the main menu, under *Online Help*. In the document there is a chapter about *BarGraphs*.



COLOR ENGINE

One attribute you will not find in the *Big Faceless Manual* is the *Color Engine Attribute*.

```
keybox-color="white"  
color-engine="monthsbestsalesreps:hue=random,luminosity=light"  
>
```

The Color Engine attribute has two parameters

- hue
- luminosity

The default values are

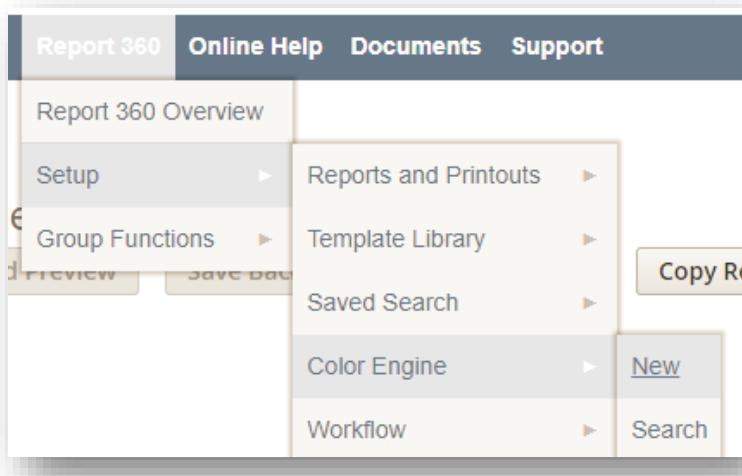
- hue=random
- luminosity=light

As you can see below there are other built-in parameters.

```
color-engine:hue=red,orange,yellow,green,blue,purple,pink,monochrome,random  
color-engine:luminosity=bright,light,dark,random
```

If none of the built-in colors works in your design you have the possibility to add your own colors

Create a New Color Engine – Report 360 – Setup – Color Engine - New



Report 360 Color Engine

Medal

Save ▾ Cancel Reset Actions ▾

NAME *
Medal

VIEW REPORT 360 COLOR ENGINE COLORS
Default View ▾

New Report 360 Color Engine Colors			Attach	Customize View
EDIT	NAME	HEX COLOR CODE	SORT ORDER ▾	
Edit	Gold	#FFD700	1	
Edit	Silver	#C0C0C0	2	
Edit	Bronze	#CD7F32	3	

Save ▾ Cancel Reset Actions ▾

In above example we have created a new color engine named *Medal*.

In the child record Color Engine Colors we have created 3 colors, Gold, Silver Bronze.

For each color you set

Name: Name of color (No space in name)

HEX Color Code: Color code in HEX format

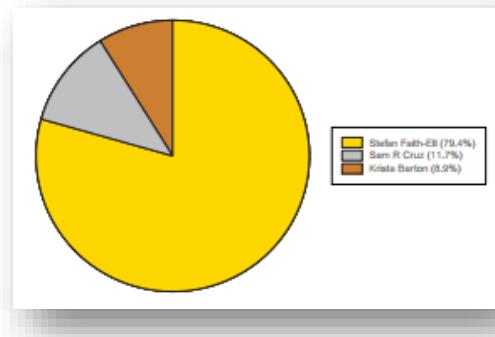
Sort Order: In which order to use the colors. Your graph is based on one or several searches (depending on graph type). If the search is ordered the first hit in the search will have the color with the lowest value. If you leave this field blank the colors will appear in random order.

When the new Color Engine is in place you can update your Color-Engine Attribute in the editor.

```
color-engine="monthsbestsalesreps:hue=Medal,luminosity=bright"
>
```

-hue=Medal (the name is case sensitive)

-luminosity=bright (set bright to get your exact color, if you chose light, it will be lighter, if you chose dark, it will be darker.)



Report 360

TowerBarGraph From a Single Search

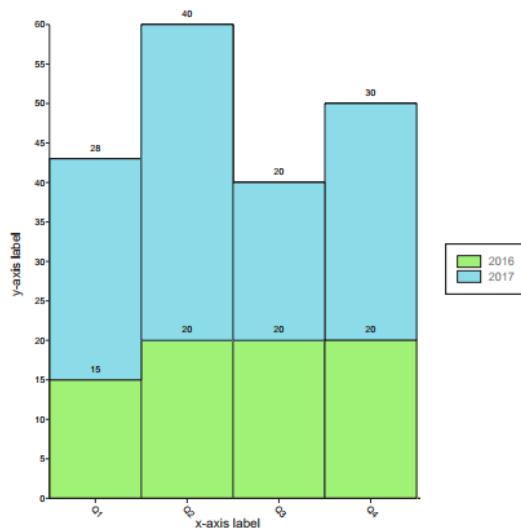


Table of Content:

TowerBarGraph from Single Search	3
Color Engine	6

TOWERBARGRAPH FROM SINGLE SEARCH

In this example we will explain how to create a Tower Bar Graph that compares and combines budgeted meetings for two different years divided into quarters.

1. Create a Saved Search

The Saved Search should only contain three columns (naming standard is VERY important)

- name (*must be lower case*)
- name2 (*must be lower case*)
- value (*must be lower case*)

The screenshot shows the 'Saved AVNS Budget Search' configuration in the Report 360 Editor. The search title is 'Budgeted Meetings 2016-2017'. The results table displays data for four quarters (Q1, Q2) across two years (2016, 2017), with values 15, 28, 40, and 20 respectively. The 'Results' tab is selected, showing sorting by 'First date in period' and output type 'Normal'. The 'Fields' section at the bottom includes fields like 'Formula (Text)', 'Name', 'Name2', and 'Value' with their corresponding summary types and formulas.

NAME	NAME2	VALUE
Q1	2016	15
Q1	2017	28
Q2	2016	40
Q2	2017	20

Notice that in this example the search is a grouped search and therefore the search must have a summary label. If your search result needs to be grouped or summarized in some way (for example sales order amounts summarized) you must use a summary search since the Report 360 Editor and Data Collector does not summarize the data from the search.

If the sorting is of importance do not forget to sort the search using *Sort by* as shown above.

2. Add the Search and Graph details via the Data Collector located at the bottom of the Report 360 Editor record.

The screenshot shows the 'Report 360 Content' interface. At the top, there are tabs for 'Report 360 Content' and 'Template Information'. Below the tabs, there are buttons for 'VIEW' (with 'Default View' selected), 'REPORT 360 DATA COLLECTOR' (with a dropdown menu), and a search bar. A large yellow box highlights the 'New Report 360 Data Collector' button. Below these buttons are links for 'EDIT', 'TYPE ▲', 'SEARCH ID', and 'ACCESSED AS'. The main area is titled 'Report 360 Data Collector' and contains various configuration fields. On the left, there are fields for 'PARENT' (set to 'Budgeted Meetings 2016-2017 (TowerBarGraph)'), 'INACTIVE' (unchecked), 'TYPE' (set to 'Graph'), 'GRAPH INSTRUCTION' (link to 'Graph Instruction >>'), 'SEARCH ID' (set to 'Budgeted Meetings 2016-2017'), 'MAX RESULT' (empty), 'ACCESSED AS' (set to 'budgetedmeetings'), and 'RECORD TYPE' (empty). On the right, there are four empty input fields labeled 'FILTER FIELD', 'FILTER OPERATOR', 'FILTER VALUE', and 'FONTS SUBTYPE'.

Type: Choose *Graph*

Type of Graph: Choose *TowerBarGraphSingleSearch*

Search ID: Choose the Search that you want to use – In this example *Budgeted Meetings 2016-2017*

Max Result: To limit the result, set a number, otherwise leave blank.

Accessed As: Set a reference name for this graph (the name that will appear in the Dynamic Tag Library). Must be lower case, only alphabetic without space.

Filter Field, Filter Operator, Filter Value: The Search result can be limited and dynamic if you use the filter field. To read more about how to use filter field we refer to the User Guide.

When you are done you save the record.

3. Add the Tower Bar Graph in the layout

Open the Report 360 Editor and place the cursor where you want to insert the graph.

The screenshot shows a code editor with several code snippets. On the right, there is a sidebar titled "Save and Preview" containing sections for "UNORDERED LIST", "WATERMARK", "BUDGETEDMEETINGS" (which is highlighted with an orange border), "HELP", "NAME", "NAME2", "TOWERBARGRAPH_SINGLESEARCH" (also highlighted with an orange border), "VALUE", and "HEADERFOOTER".

```

245     color: #333333;
246
247   }
248
249   td {
250     font-size: 9pt;
251     vertical-align: top;
252     padding: 1px 5px 1px;
253     <!-- background-color: #e3e3e3; -->
254     color: #333333;
255
256   }
257
258
259   </style>
260   <!-- Style sheet definitions ends here -->
261
262   </head>
263   <body header="pageheader" header-height="${cHeaderHeight}${Unit}" footer="pageFooter" footer-height="${cFooterHeight}${Unit}"
264     padding="0" margin="${PMTop} ${PMRight} ${PMBottom} ${PMLeft}" size="A4" >
265
266     Budgeted Meetings<br/>
267
268
269     </body>
270   </pdf>
271
272
273

```

Record ID

4. In the Dynamic Tag Library on the right side of the editor you will find **BUDGETEDMEETINGS** (name set by *Accessed As*) and **TOWERBARGRAPH_SINGLESEARCH**.

Double-click on **TOWERBARGRAPH_SINGLESEARCH** to add the Bar Graph code in the editor.

The screenshot shows a code editor with a specific section of code highlighted by an orange box. This section contains the configuration for a Tower Bar Graph.

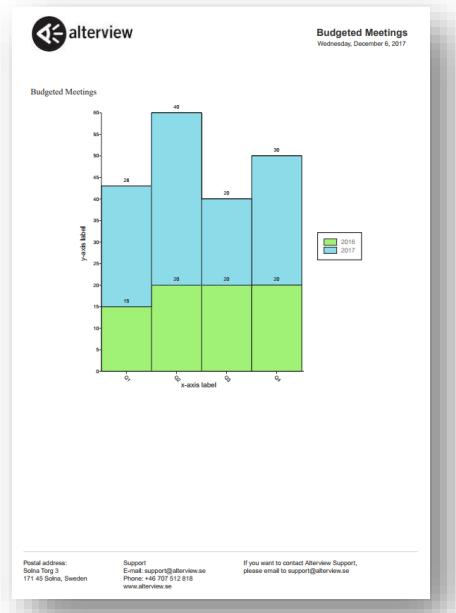
```

269 * <towerbargraph
270   width="400"
271   height="400"
272   align="center"
273   display-barvalues="top"
274   xaxis-label="x-axis label"
275   yaxis-label="y-axis label"
276   xaxis-rotate="45"
277   display-key="boxed-right"
278   display-percentage="with-key"
279   key-color="gray"
280   key-font-family="Helvetica"
281   key-font-style="normal"
282   key-font-weight="normal"
283   key-font-size="9pt"
284   keybox-border-color="black"
285   keybox-color="white"
286   color-engine="budgetedmeetings:hue=random,luminosity=light"
287   >
288   <if budgetedmeetings?has_content>
289     <list budgetedmeetings as item>
290       <gdata name="${item.name}" name2="${item.name2}" value="${item.value}" color="${item.color}" ></gdata>
291     </list>
292   </if>
293 </towerbargraph>

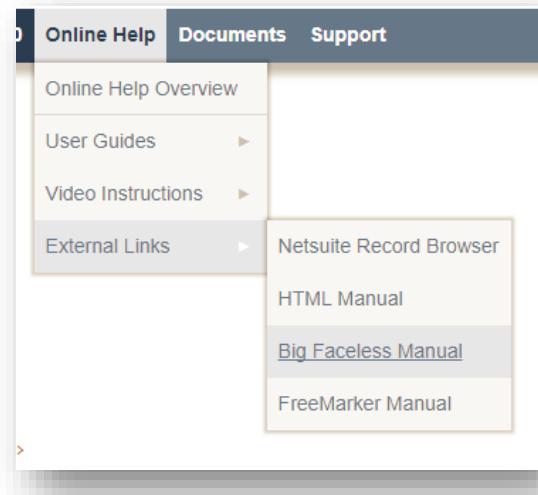
```

The Tower Bar Graph attributes (orange section) can be altered to change the appearance of the graph. Tips about other useful attributes and alternations of currently used ones will be added automatically above the graph as a comment.

Click on *Save and Preview* to run the Report and view the graph.



To read more about the attributes as well as other useful attributes we refer to *Big Faceless Manual* that you will find in the main menu, under *Online Help*. In the document there is a chapter about *TowerBarGraphs*.



COLOR ENGINE

One attribute you will not find in the *Big Faceless Manual* is the *Color Engine Attribute*.

```
keybox-color="white"  
color-engine="monthsbestsalesreps:hue=random,luminosity=light"  
>
```

The Color Engine attribute has two parameters

- hue
- luminosity

The default values are

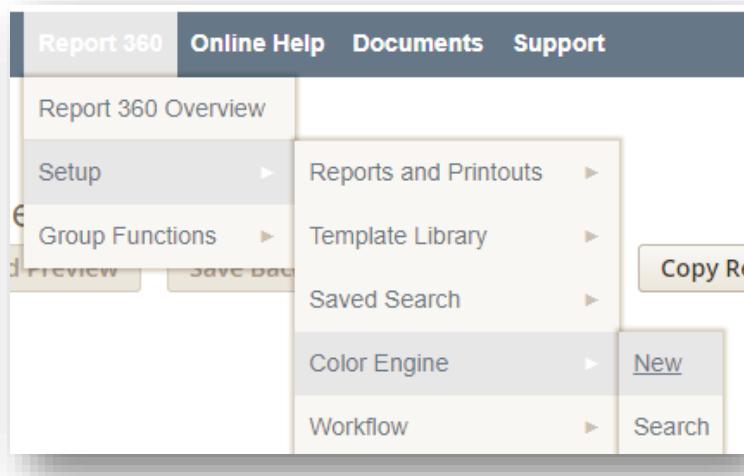
- hue=random
- luminosity=light

As you can see below there are other built-in parameters.

```
color-engine:hue-red,orange,yellow,green,blue,purple,pink,monochrome,random  
color-engine:luminosity=bright,light,dark,random
```

If none of the built-in colors works in your design you have the possibility to add your own colors

Create a New Color Engine – Report 360 – Setup – Color Engine - New



The screenshot shows the 'Report 360 Color Engine' creation form. At the top, there are buttons for 'Save', 'Cancel', 'Reset', and 'Actions'. The 'NAME *' field contains 'Medal'. Below the form, there is a 'VIEW' section with a dropdown set to 'Default View'. The main area displays a table titled 'REPORT 360 COLOR ENGINE COLORS' with three rows:

EDIT	NAME	HEX COLOR CODE	SORT ORDER ▲
Edit	Gold	#FFD700	1
Edit	Silver	#C0C0C0	2
Edit	Bronze	#CD7F32	3

At the bottom of the form are 'Save', 'Cancel', 'Reset', and 'Actions' buttons.

In above example we have created a new color engine named *Medal*.

In the child record Color Engine Colors we have created 3 colors, Gold, Silver Bronze.

For each color you set

Name: Name of color (No space in name)

HEX Color Code: Color code in HEX format

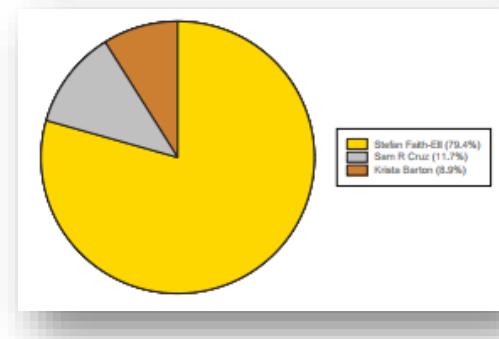
Sort Order: In which order to use the colors. Your graph is based on one or several searches (depending on graph type). If the search is ordered the first hit in the search will have the color with the lowest value. If you leave this field blank the colors will appear in random order.

When the new Color Engine is in place you can update your Color-Engine Attribute in the editor.

```
color-engine="monthsbestsalesreps:hue=Medal,luminosity=bright"
>
```

-hue=Medal (the name is case sensitive)

-luminosity=bright (set bright to get your exact color, if you chose light, it will be lighter, if you chose dark, it will be darker.)



Report 360

TowerBarGraph From Multiple Searches

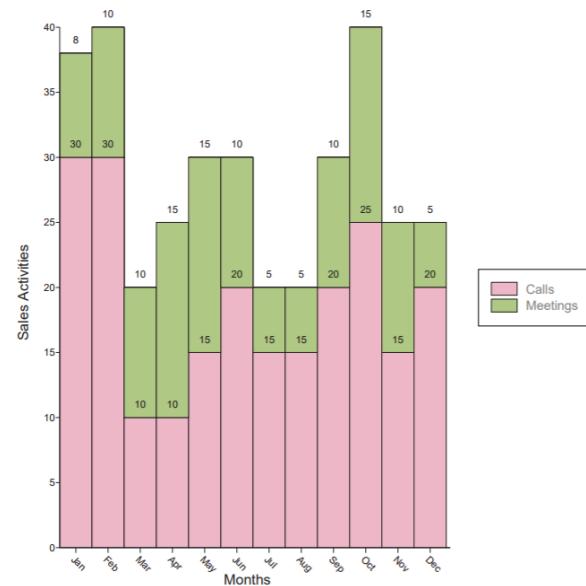


Table of Content:

TowerBarGraph from Multiple Searches	3
Color Engine	8

TOWERBARGRAPH FROM MULTIPLE SEARCHES

In this example we explain how to create a TowerBar Graph that lists an employee's budgeted sales activities per month divided by activity type (meetings / phone calls).

1. Create the first Saved search (in this example *budgeted sales meetings*).

The Saved Search should only contain two columns (naming standard is VERY important)

- name (always lower case)
- value (always lower case)

The screenshot shows the 'Saved AVNS Budget Search' configuration in the Report 360 Editor. The search title is 'Meetings per Month - Budget'. The results table shows monthly counts:

NAME	VALUE
Apr	15
Aug	5
Dec	5
Feb	10
Jan	8
Jul	5

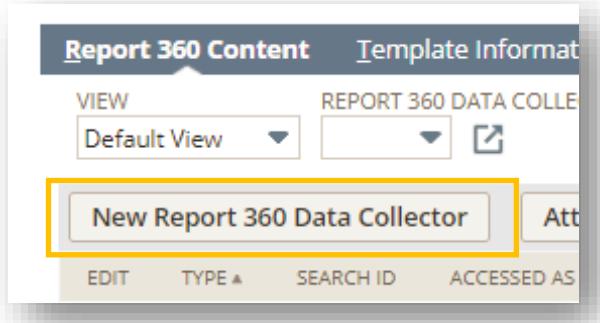
The 'Criteria' tab is selected. A yellow box highlights the 'SORT BY' section, which contains 'First date in period' and 'DESCENDING' sort order. Another yellow box highlights the 'FUNCTION' column in the 'FIELD' table, which contains 'TO_CHAR({custrecord_avbu_first_date_in_period}, 'Mon')'. A third yellow box highlights the 'CUSTOM LABEL' column in the same table, which contains 'name' and 'value'.

Please note that if you are creating a summary saved search, summary labels must be used. In this example we only use the summary type = 'Group' which is why a Custom label will suffice. However, if your search result needs to be grouped or summarized in some way (for example sales order amounts summarized) you must use a summary search since the Report 360 Editor and Data Collector does not summarize the data from the search.

If the sorting is of importance do not forget to sort the search.

When the first saved search is completed, simply repeat this procedure and create the second saved search including results for *budgeted phone calls*.

- Add the Graph in the Data Collector located at the bottom of the Report 360 Editor record.
- The Searches will be added in the next step.



Report 360 Data Collector

Save | Cancel | Reset | Actions ▾

PARENT Sales Activities per Month - Budget (Tower Graph, Multi Search)	RECORD ID [Redacted]
<input type="checkbox"/> INACTIVE	FILTER FIELD [Redacted]
TYPE Graph	TYPE OF GRAPH TowerBarGraphMultiSearch
GRAPH INSTRUCTION Graph Instruction >>	FILTER OPERATOR [Redacted]
SEARCH ID [Redacted]	FILTER VALUE [Redacted]
ACCESSED AS salesactivitiesbudget	FONT FILE [Redacted]
RECORD TYPE [Redacted]	FONTS SUBTYPE [Redacted]

Type: Choose *Graph*

Type of Graph: Choose *TowerBarGraphMultiSearch*

Accessed As: Set a reference name for this graph (the name that will appear in the Dynamic Tag Library). Must be lower case, only alphabetic without space.

When done you save the record.

- The next step is to add the saved searches to the graph.

To add a saved search, start by opening up the Report 360 Data collector record you have just created and click on the button:

New Report 360 Data Search

Search: Select the first saved search you have created

Sort Order: Decide the order in which the results will show in the graph. (Number 1 will show at the bottom of the graph, Number above search 1 etc.)

Accessed As: Set a reference name for this search. The name will appear as a reference in the editor

Filter Field, Filter Operator, Filter Value: The Search result can be limited and dynamic if you use the filter field. To read more about how to use filter field we refer to the User Guide.

Title: The title of the search will be shown in the graph to describe what the search results show, in this example the budgeted phone calls.

Default Value for Missing Points: If the search is missing results for a specific point in the graph, a default value can be set. If field is empty, 0 is used as default value.

Max Results: To limit the result, set a number, otherwise leave blank.

Report 360 Data Search

Save Cancel Reset | Actions ▾

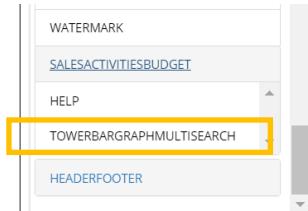
<input type="checkbox"/> INACTIVE	ACCESSION AS callsbudget	TITLE Calls
PARENT 553	FILTER FIELD custrecord_avbu_employee	DEFAULT VALUE FOR MISSING POINTS
SEARCH Phone Calls per Month - Budget	FILTER OPERATOR Is	MAX RESULTS
SORT ORDER 1	FILTER VALUE {id}	

Repeat this procedure to add the second saved search.

4. Add the TowerBar Graph in the layout

Open the Report 360 Editor and place the cursor where you want to insert the graph

```
258 <style>
259   <!-- Style sheet definitions ends here -->
260 
261 
262 </head>
263 <body header="pageheader" header-height="${cHeaderHeight}${(Unit)}" footer="pagefooter" footer-height="${cFooterHeight}${(Unit)}"
264   padding="0" margin="${PMTop} ${PMRight} ${PMBottom} ${PMLeft}" size="A4" >
265 
266   Sales Activities per Month - Budget <br/>
267 
268 
269 
270 
271 </body>
272 </pdf>
```



In the Dynamic Tag Library on the right hand side of the editor you will find **SALESACTIVITIESBUDGET** (name set by *Accessed As*) and **TOWERBARGRAPHMULTISEARCH**.

Double-click on **TOWERBARGRAPHMULTISEARCH** to add the TowerBar Graph code in the editor.

```
268 <towerbargraph
269   width="400"
270   height="400"
271   align="center"
272   display-barvalues="top"
273   xaxis-label="x-axis label"
274   yaxis-label="y-axis label"
275   xaxis-rotate="45"
276   display-key="boxed-right"
277   display-percentage="with-key"
278   key-color="gray"
279   key-font-family="Helvetica"
280   key-font-style="normal"
281   key-font-weight="normal"
282   key-font-size="9pt"
283   keybox-border-color="black"
284   keybox-color="white"
285   color-engine="salesactivitiesbudget:hue=random,luminosity=light"
286   >
287   <if salesactivitiesbudget?has_content>
288     <list salesactivitiesbudget as item>
289       <gdata name="${item.name}" name2="${item.name2}" value="${item.value}" color="${item.color}" ></gdata>
290     </list>
291   </if>
292 </towerbargraph>
293
```

The TowerBar Graph attributes (orange section) can be altered to change the appearance of the graph. Tips about other useful attributes and alternations of currently used ones will be added automatically above the graph as a comment.

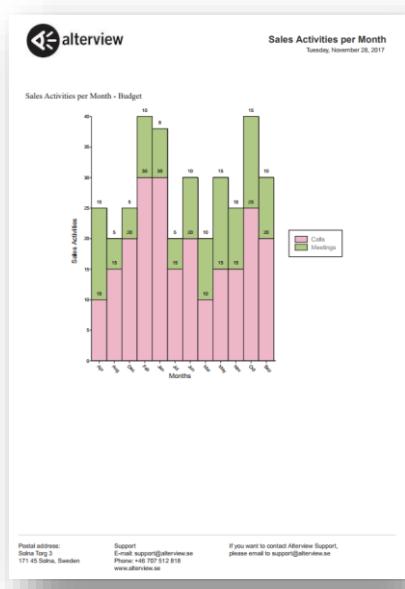
```

272 |     display-barvalues="top"
273 |     xaxis-label="Months"
274 |     yaxis-label="Sales Activities"
275 |     xaxis-rotate="45"
276 |     display-key="boxed-right"
... |

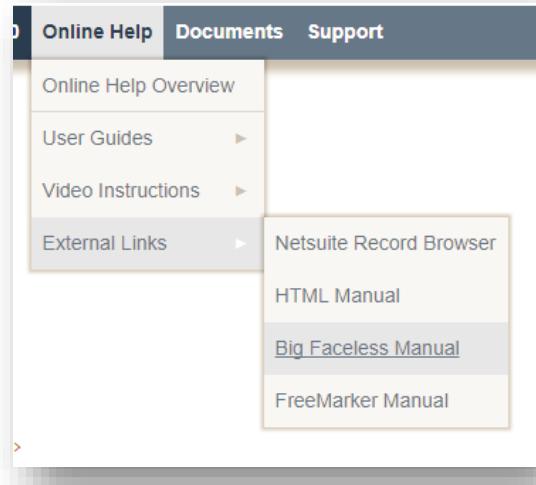
```

Tips: This is also where you can set the labels for the x- and y-axis in the graph.

Click on *Save and Preview* to run the Report and view the graph.



To read more about the attributes as well as other useful attributes we refer to *Big Faceless Manual* that you will find in the main menu, under *Online Help*. In the document there is a chapter about *TowerBarGraphs*.



COLOR ENGINE

One attribute you will not find in the *Big Faceless Manual* is the *Color Engine Attribute*.

```
keybox-color="white"  
color-engine="monthsbestsalesreps:hue=random,luminosity=light"  
>
```

The Color Engine attribute has two parameters

- hue
- luminosity

The default values are

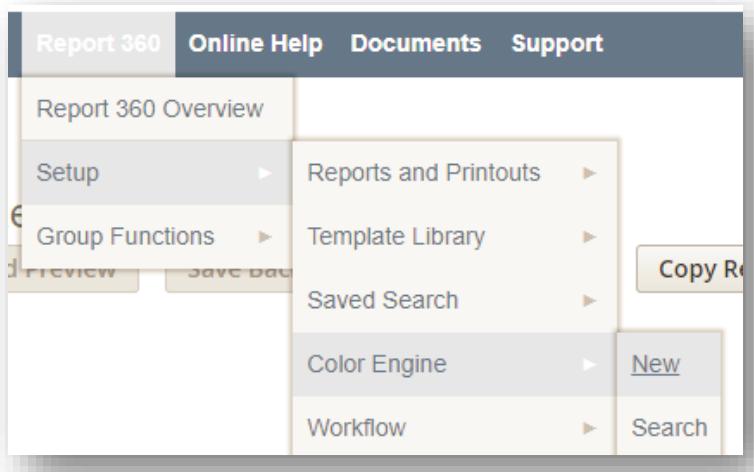
- hue=random
- luminosity=light

As you can see below there are other built-in parameters.

```
color-engine:hue=red,orange,yellow,green,blue,purple,pink,monochrome,random  
color-engine:luminosity=bright,light,dark,random
```

If none of the built-in colors works in your design you have the possibility to add your own colors

Create a New Color Engine – Report 360 – Setup – Color Engine - New



Report 360 Color Engine

Medal

Save ▾ Cancel Reset Actions ▾

NAME *
Medal

VIEW REPORT 360 COLOR ENGINE COLORS
Default View ▾

New Report 360 Color Engine Colors			Attach	Customize View
EDIT	NAME	HEX COLOR CODE	SORT ORDER ▾	
Edit	Gold	#FFD700	1	
Edit	Silver	#C0C0C0	2	
Edit	Bronze	#CD7F32	3	

Save ▾ Cancel Reset Actions ▾

In above example we have created a new color engine named *Medal*.

In the child record Color Engine Colors we have created 3 colors, Gold, Silver Bronze.

For each color you set

Name: Name of color (No space in name)

HEX Color Code: Color code in HEX format

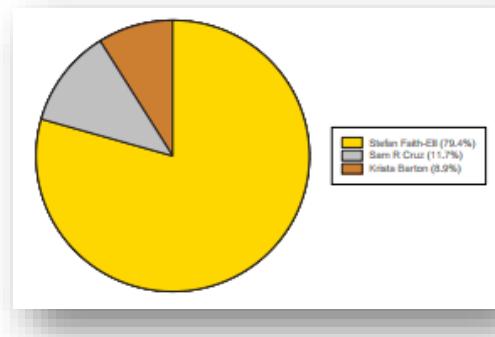
Sort Order: In which order to use the colors. Your graph is based on one or several searches (depending on graph type). If the search is ordered the first hit in the search will have the color with the lowest value. If you leave this field blank the colors will appear in random order.

When the new Color Engine is in place you can update your Color-Engine Attribute in the editor.

```
color-engine="monthsbestsalesreps:hue=Medal,luminosity=bright"
>
```

-hue=Medal (the name is case sensitive)

-luminosity=bright (set bright to get your exact color, if you chose light, it will be lighter, if you chose dark, it will be darker.)



Report 360

MultiBarGraph From a Single Search

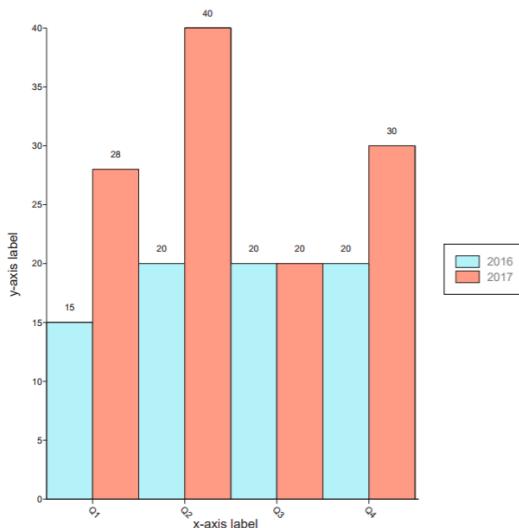


Table of Content:

MultiBarGraph from Single Search.....	3
Color Engine	6

MULTIBARGRAPH FROM SINGLE SEARCH

In this example we will explain how to create a Multi Bar Graph that compares budgeted meetings for two different years divided into quarters.

1. Create a Saved Search

The Saved Search should only contain three columns (naming standard is VERY important)

- name (*must be lower case*)
- name2 (*must be lower case*)
- value (*must be lower case*)

The screenshot shows the 'Report 360 Editor' interface. On the left, the search configuration pane displays:

- Saved AVNS Budget Search**
- Budgeted Meetings 2016-2017**
- Save & Run**, **Cancel**, **Reset**, **Preview** buttons
- SEARCH TITLE ***: Budgeted Meetings 2016-2017
- ID**: customsearch307
- OWNER**: Simon Erseus
- PUBLIC** checkbox checked
- AVAILABLE AS LIST VIEW** checkbox unchecked

On the right, the search results pane shows a table titled "Budgeted Meetings 2016-2017: Results" with the following data:

NAME	NAME2	VALUE
Q1	2016	15
Q1	2017	28
Q2	2017	40
Q2	2016	20

The bottom section of the editor shows the search configuration tabs: **Criteria**, **Results** (selected), **Highlighting**, **Available Filters**, **Audience**, **Roles**, **Email**, **Audit Trail**, **Execution Log**, **Search Title Translation**. The **Results** tab contains:

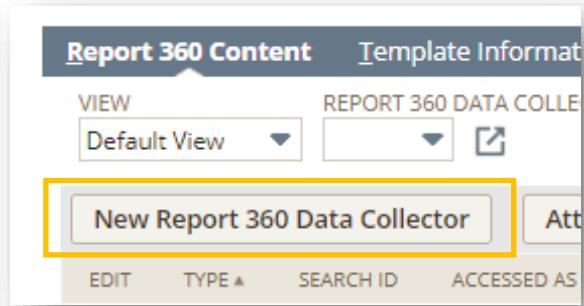
- SORT BY**: First date in period (selected), DESCENDING checkbox unchecked
- THEN BY**: (empty dropdown), DESCENDING checkbox unchecked
- THEN BY**: (empty dropdown), DESCENDING checkbox unchecked
- Remove All**, **Add Multiple** buttons
- OUTPUT TYPE**: Normal (selected), SHOW TOTALS, MY PREFERRED SEARCH RESULTS checkboxes unchecked
- FIELD *** table:

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL
:: Formula (Text)	Group	'Q' TO_CHAR((custrecord_avbu_first_date_in_period), 'Q')			name		
:: Formula (Text)	Group	TO_CHAR((custrecord_avbu_first_date_in_period), 'YYYY')			name2		
:: Budget Number	Sum				value		value

Notice that in this example the search is a grouped search and therefore the search must have a summary label. If your search result needs to be grouped or summarized in some way (for example sales order amounts summarized) you must use a summary search since the Report 360 Editor and Data Collector does not summarize the data from the search.

If the sorting is of importance do not forget to sort the search using *Sort by* as shown above.

- Add the Search and Graph details via the Data Collector located at the bottom of the Report 360 Editor record.



Report 360 Content

New Report 360 Data Collector

Report 360 Data Collector

Save | **Cancel** | **Reset** | **Actions**

PARENT Budgeted Meetings 2016-2017 (MultiBarGraph)	FILTER FIELD
<input type="checkbox"/> INACTIVE	FILTER OPERATOR
TYPE Graph	FILTER VALUE
TYPE OF GRAPH MultiBarGraphSingleSearch	FONT FILE
GRAPH INSTRUCTION Graph Instruction >>	FONTS SUBTYPE
SEARCH ID Budgeted Meetings 2016-2017	MAX RESULT
ACCESSED AS budgetedmeetings	
RECORD TYPE	

Type: Choose *Graph*

Type of Graph: Choose *MultiBarGraphSingleSearch*

Search ID: Choose the Search that you want to use – In this example *Budgeted Meetings 2016-2017*

Max Result: To limit the result, set a number, otherwise leave blank.

Accessed As: Set a reference name for this graph (the name that will appear in the Dynamic Tag Library). Must be lower case, only alphabetic without space.

Filter Field, Filter Operator, Filter Value: The Search result can be limited and dynamic if you use the filter field. To read more about how to use filter field we refer to the User Guide.

When you are done you save the record.

3. Add the Bar Graph in the layout

Open the Report 360 Editor and place the cursor where you want to insert the graph.



The screenshot shows the Report 360 Editor interface. On the left is the code editor with the following snippet:

```
243     padding: 1px 5px 1px;
244     background-color: #e3e3e3;
245     color: #333333;
246   }
247   td {
248     font-size: 9pt;
249     vertical-align: top;
250     padding: 1px 5px 1px;
251     <!-- background-color: #e3e3e3; -->
252     color: #333333;
253   }
254
255
256
257
258
259 </style>
260 <!-- Style sheet definitions ends here -->
261
262 </head>
263 <body header="pageheader" header-height="${cHeaderHeight}${Unit}" footer="pagefooter" footer-height="${cFooterHeight}${Unit}"
264   padding="0" margin="${PMTop} ${PMRight} ${PMBottom} ${PMLeft}" size="A4" >
265
266   Budgeted Meetings<br/>
267
268
269
270
271 </body>
272 </pdf>
```

On the right is the Dynamic Tag Library panel, which includes sections like UNORDERED LIST, WATERMARK, BUDGETEDMEETINGS, HELP, MULTIBARGRAPHSSINGLESEARCH (highlighted with an orange border), NAME, NAME2, VALUE, and HEADERFOOTER.

4. In the Dynamic Tag Library on the right side of the editor you will find **BUDGETEDMEETINGS** (name set by *Accessed As*) and **MULTIBARGRAPHSSINGLESEARCH**.

Double-click on **MULTIBARGRAPHSSINGLESEARCH** to add the Bar Graph code in the editor.

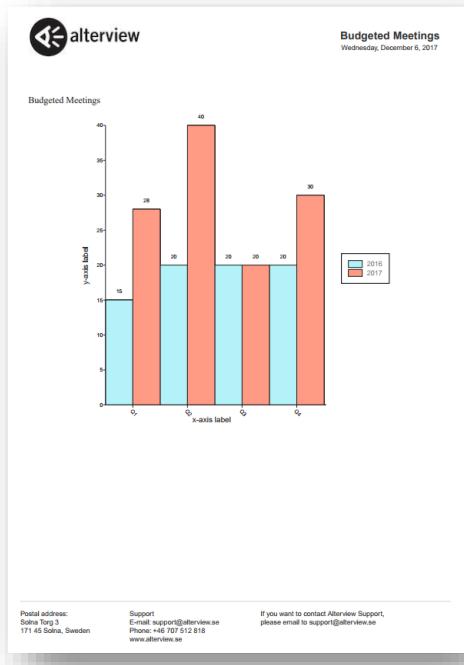


The code editor shows the following code, with the Multi Bar Graph section highlighted by an orange box:

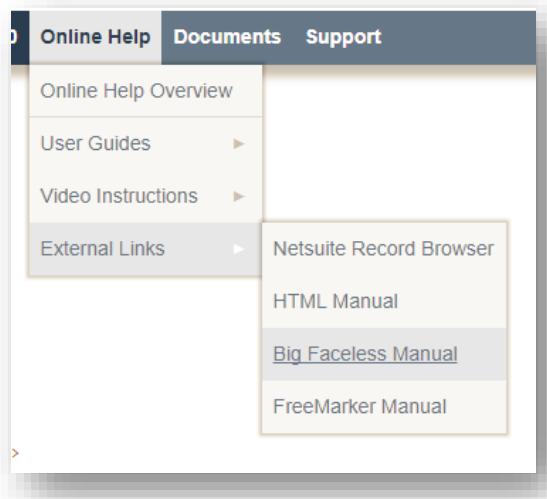
```
268 <kmultibargraph
269   width="400"
270   height="400"
271   align="center"
272   display-barvalues="top"
273   xaxis-label="x-axis label"
274   yaxis-label="y-axis label"
275   xaxis-rotate="45"
276   display-key="boxed-right"
277   display-percentage="with-key"
278   key-color="gray"
279   key-font-family="Helvetica"
280   key-font-style="normal"
281   key-font-weight="normal"
282   key-font-size="9pt"
283   keybox-border-color="black"
284   keybox-color="white"
285   color-engine="budgetedmeetings:hue=random,luminosity=light"
286
287 <#if budgetedmeetings?has_content>
288   <#list budgetedmeetings as item>
289     <gdata name="${item.name}" name2="${item.name2}" value="${item.value}" ></gdata>
290   </#list>
291 </#if>
292 </multibargraph>
```

The Multi Bar Graph attributes (orange section) can be altered to change the appearance of the graph. Tips about other useful attributes and alternations of currently used ones will be added automatically above the graph as a comment.

Click on *Save and Preview* to run the Report and view the graph.



To read more about the attributes as well as other useful attributes we refer to *Big Faceless Manual* that you will find in the main menu, under *Online Help*. In the document there is a chapter about *MultiBarGraphs*.



COLOR ENGINE

One attribute you will not find in the *Big Faceless Manual* is the *Color Engine Attribute*.

```
keybox-color="white"  
color-engine="monthsbestsalesreps:hue=random,luminosity=light"  
>
```

The Color Engine attribute has two parameters

- hue
- luminosity

The default values are

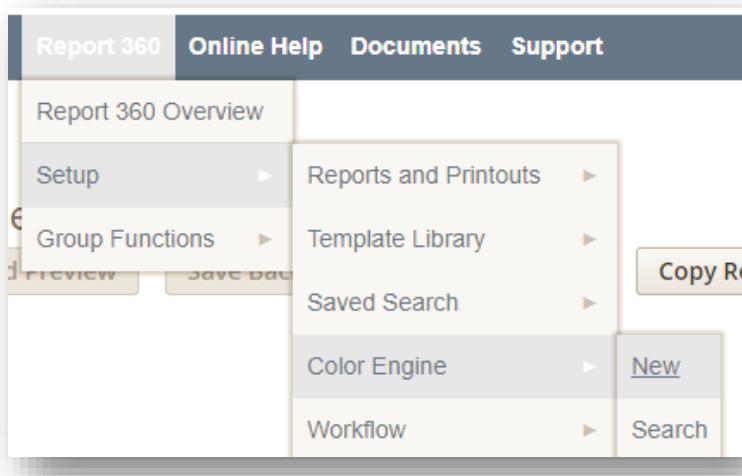
- hue=random
- luminosity=light

As you can see below there are other built-in parameters.

```
color-engine:hue=red,orange,yellow,green,blue,purple,pink,monochrome,random  
color-engine:luminosity=bright,light,dark,random
```

If none of the built-in colors works in your design you have the possibility to add your own colors

Create a New Color Engine – Report 360 – Setup – Color Engine - New



Report 360 Color Engine

Medal

Save ▾ Cancel Reset Actions ▾

NAME *
Medal

VIEW REPORT 360 COLOR ENGINE COLORS
Default View ▾

New Report 360 Color Engine Colors			Attach	Customize View
EDIT	NAME	HEX COLOR CODE	SORT ORDER ▾	
Edit	Gold	#FFD700	1	
Edit	Silver	#C0C0C0	2	
Edit	Bronze	#CD7F32	3	

Save ▾ Cancel Reset Actions ▾

In above example we have created a new color engine named *Medal*.

In the child record Color Engine Colors we have created 3 colors, Gold, Silver Bronze.

For each color you set

Name: Name of color (No space in name)

HEX Color Code: Color code in HEX format

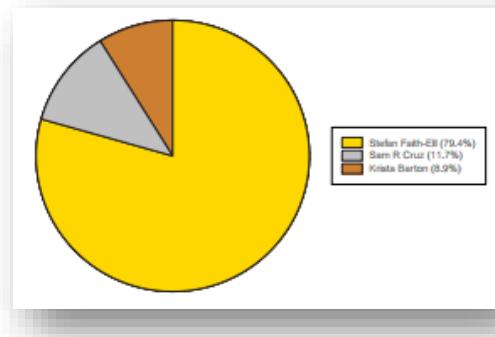
Sort Order: In which order to use the colors. Your graph is based on one or several searches (depending on graph type). If the search is ordered the first hit in the search will have the color with the lowest value. If you leave this field blank the colors will appear in random order.

When the new Color Engine is in place you can update your Color-Engine Attribute in the editor.

```
color-engine="monthsbestsalesreps:hue=Medal,luminosity=bright"
>
```

-hue=Medal (the name is case sensitive)

-luminosity=bright (set bright to get your exact color, if you chose light, it will be lighter, if you chose dark, it will be darker.)



Report 360

MultiBarGraph From Multiple Searches

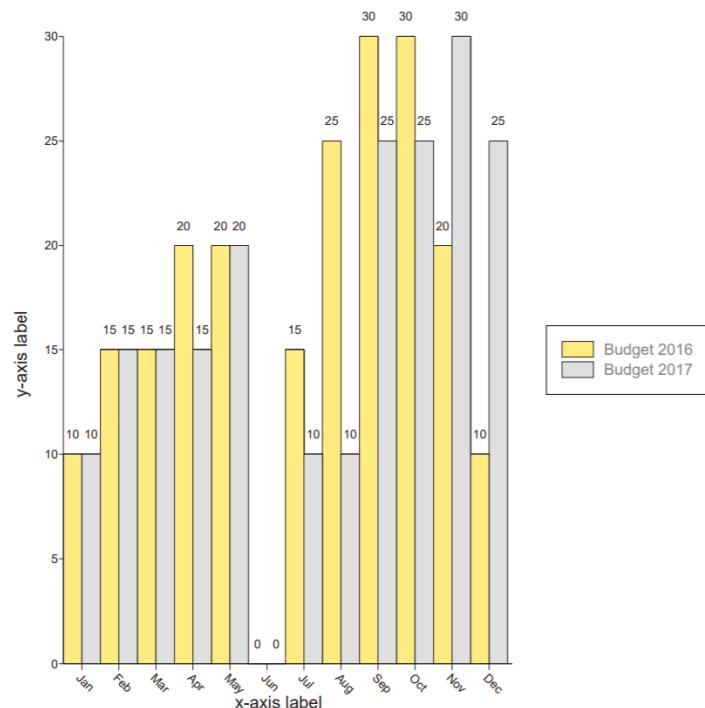


Table of Content:

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Color Engine	8

MULTIBARGRAPH FROM MULTIPLE SEARCHES

In this example we will explain how to create a Multi Bar Graph using two saved searches to compare budget numbers for 2016 and 2017.

1. Create the first Saved Search (in this example *budget 2016*).

The Saved Search should only contain two columns (naming standard is VERY important)

- name (*must be lower cases*)
- value (*must be lower cases*)

Set the criteria to only include results for 2016.

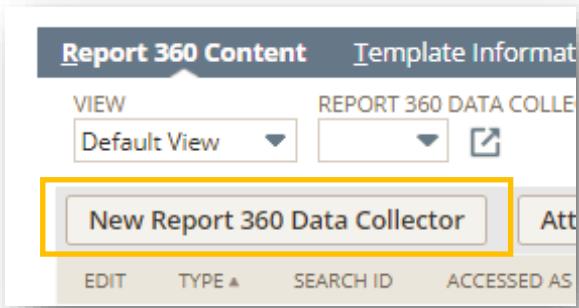
Please note that if you are using a summary saved search, summary labels must be used. However, if your search result needs to be grouped or summarized in some way (for example sales order amounts summarized) you must use a summary search since the Report 360 Editor and Data Collector does not summarize the data from the search.

If the sorting is of importance do not forget to sort the search.

When the first saved search is completed, simply repeat this procedure and create the second saved search including results for *budget 2017*.

The screenshot shows the 'AVNS Budget 2016' saved search interface. The left sidebar displays search criteria: ID (customsearch270), OWNER (Pär Burman), PUBLIC checked, and AVAILABLE AS LIST VIEW unchecked. The main area shows the search results for 'AVNS Budget 2016: Results'. The results table has columns for NAME and VALUE, with four rows: Jan (10), Feb (15), Mar (15), and Apr (20). The table header includes 'TOTAL: 12'. Below the table, there are tabs for Criteria, Results, Highlighting, Available Filters, Audience, Roles, Email, Audit Trail, Execution Log, and Search Title Translation. Under the Results tab, there are sections for SORT BY (Date Created DESCENDING), THEN BY (empty), and THEN BY (empty). There are also options for OUTPUT TYPE (Normal), SHOW TOTALS, and MY PREFERRED SEARCH RESULTS. At the bottom, there are buttons for Remove All and Add Multiple, and a table for defining fields: FIELD (Formula (Text) and Budget Number), SUMMARY TYPE (empty), FUNCTION (empty), FORMULA (TO_CHAR({custrecord_avbu_first_date_in_period),'Mon')), WHEN ORDERED BY FIELD (empty), and CUSTOM LABEL (name and value).

- Add the Graph details via the Data Collector located at the bottom of the Report 360 Editor record. The Searches will be added in the next step.



The screenshot shows the 'Report 360 Content' interface. At the top, there are 'VIEW' and 'REPORT 360 DATA COLLECTOR' dropdown menus, and a 'New Report 360 Data Collector' button, which is highlighted with a yellow box. Below these are 'EDIT', 'TYPE ▾', 'SEARCH ID', and 'ACCESSED AS' buttons.

Report 360 Data Collector

Save ▾ Cancel Reset | Actions ▾

PARENT AVNS Budget	RECORD ID
<input type="checkbox"/> INACTIVE	FILTER FIELD
TYPE Graph	FILTER OPERATOR
TYPE OF GRAPH MultiBarGraphMultiSearch	FILTER VALUE
GRAPH INSTRUCTION Graph Instruction >>	FONT FILE
SEARCH ID	FONTS SUBTYPE
ACCESSED AS multibargraphmulti	
RECORD TYPE	

Type: Choose *Graph*

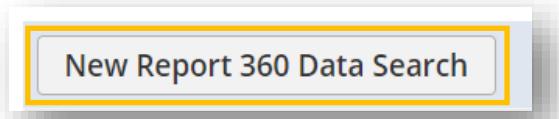
Type of Graph: Choose *MultiBarGraphMultiSearch*

Accessed As: Set a reference name for this graph (the name that will appear in the Dynamic Tag Library). Must be lower case, only alphabetic without space.

When you are done you save the record.

3. The next step is to add the saved searches to the graph.

To add a saved search, start by opening up the Data collector record you have just created and click on the button:



Search: Select the first saved search you have created

Sort Order: Decide the order in which the results will show in the graph

Accessed As: Set a reference name for this search. The name will appear as a reference in the editor

Filter Field, Filter Operator, Filter Value: The Search result can be limited and dynamic if you use the filter field. To read more about how to use filter field we refer to the User Guide.

Title: The title of the search will be shown in the graph to describe what the search's results show, in this example the *budget for 2016*.

Default Value for Missing Points: If the search is missing results for a specific point in the graph, a default value can be set. If field is empty, 0 is used as default value.

Max Results: To limit the result, set a number, otherwise leave blank.

The screenshot shows the 'Report 360 Data Search' configuration dialog box. It has several input fields and dropdown menus. On the left, there are dropdowns for 'INACTIVE' (unchecked), 'PARENT' (set to 403), 'SEARCH' (set to 'AVNS Budget 2016'), and 'SORT ORDER' (set to 1). On the right, there are four main sections: 'ACCESSED AS' (set to 'budget2016'), 'FILTER FIELD' (empty), 'FILTER OPERATOR' (empty), and 'FILTER VALUE' (empty). Further to the right are three more sections: 'TITLE' (set to 'Budget 2016'), 'DEFAULT VALUE FOR MISSING POINTS' (empty), and 'MAX RESULTS' (empty).

Repeat this procedure to add the second saved search.

4. Add the Multi Bar Graph in the layout

Open the Report 360 Editor and place the cursor where you want to insert the graph.



In the Dynamic Tag Library on the right side of the editor you will find the **MULTIBARGRAPH MULTI** (set by Accessed As) and **MULTIBARGRAPH MULTISEARCH**.

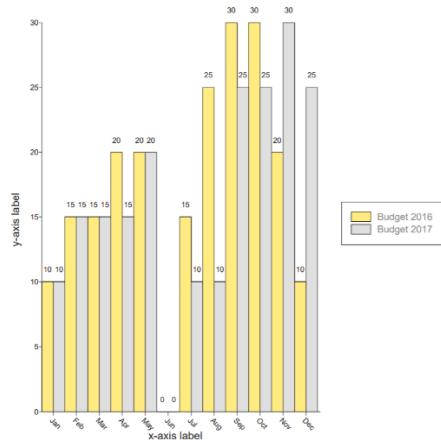
Double-click on **MULTIBARGRAPH MULTISEARCH** to add the Multi Bar Graph code in the editor.

The screenshot shows the Report 360 Editor code editor. A specific section of the code is highlighted with an orange box. This section contains the configuration for a multi-bar graph, including attributes like width, height, align, display-barvalues, xaxis-label, yaxis-label, xaxis-rotate, display-key, display-percentage, key-color, key-font-family, key-font-style, key-font-weight, key-font-size, keybox-border-color, keybox-color, and color-engine. The code editor also shows line numbers from 1060 to 1084.

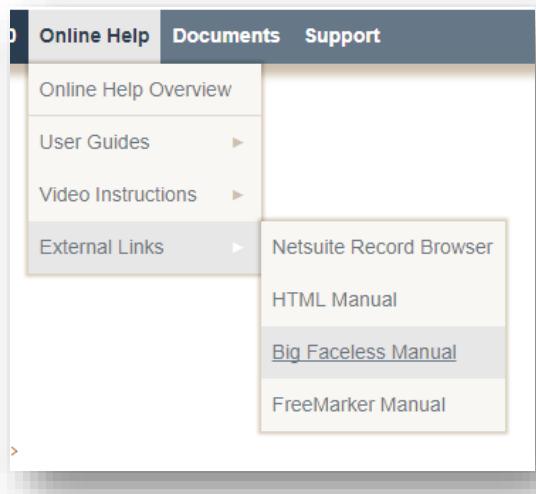
```
1060 <multibargraph
1061     width="400"
1062     height="400"
1063     align="center"
1064     display-barvalues="top"
1065     xaxis-label="x-axis label"
1066     yaxis-label="y-axis label"
1067     xaxis-rotate="45"
1068     display-key="boxed-right"
1069     display-percentage="with-key"
1070     key-color="gray"
1071     key-font-family="Helvetica"
1072     key-font-style="normal"
1073     key-font-weight="normal"
1074     key-font-size="9pt"
1075     keybox-border-color="black"
1076     keybox-color="white"
1077     color-engine="multibargraphmulti:hue=random,luminosity=light"
1078     >
1079         <#if multibargraphmulti?has_content>
1080             <#list multibargraphmulti as item>
1081                 <gdata name="${item.name}" name2="${item.name2}" value="${item.value}" ></gdata>
1082             </#list>
1083         </#if>
1084     </multibargraph>
```

The Multi Bar Graph attributes (orange section) can be altered to change the appearance of the graph. Tips about other useful attributes and alternations of currently used ones will be added automatically above the graph as a comment.

Click on *Save and Preview* to run the Report and view the graph.



To read more about the attributes as well as other useful attributes we refer to *Big Faceless Manual* that you will find in the main menu, under *Online Help*. In the document there is a chapter about *MultiBarGraphs*.



COLOR ENGINE

One attribute you will not find in the *Big Faceless Manual* is the *Color Engine Attribute*.

```
keybox-color="white"  
color-engine="monthsbestsalesreps:hue=random,luminosity=light"  
>
```

The Color Engine attribute has two parameters

- hue
- luminosity

The default values are

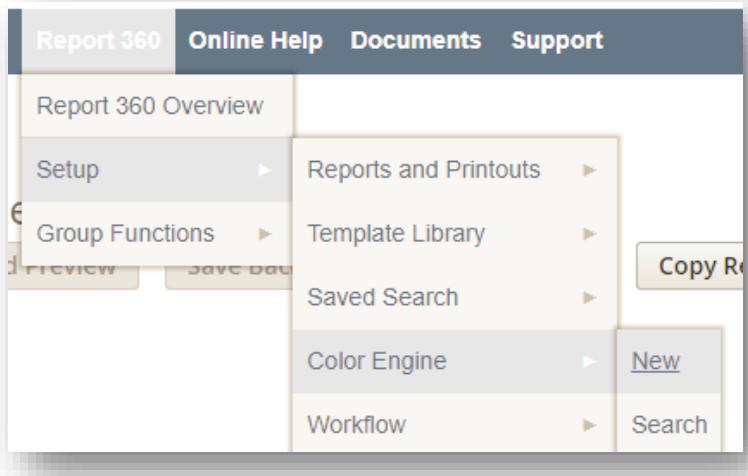
- hue=random
- luminosity=light

As you can see below there are other built-in parameters.

```
color-engine:hue=red,orange,yellow,green,blue,purple,pink,monochrome,random  
color-engine:luminosity=bright,light,dark,random
```

If none of the built-in colors works in your design you have the possibility to add your own colors

Create a New Color Engine – Report 360 – Setup – Color Engine - New



Report 360 Color Engine

Medal

Save Cancel Reset Actions ▾

NAME *
Medal

VIEW REPORT 360 COLOR ENGINE COLORS
Default View ▾

New Report 360 Color Engine Colors			Attach	Customize View
EDIT	NAME	HEX COLOR CODE	SORT ORDER ▾	
Edit	Gold	#FFD700	1	
Edit	Silver	#C0C0C0	2	
Edit	Bronze	#CD7F32	3	

Save Cancel Reset Actions ▾

In above example we have created a new color engine named *Medal*.

In the child record Color Engine Colors we have created 3 colors, Gold, Silver Bronze.

For each color you set

Name: Name of color (No space in name)

HEX Color Code: Color code in HEX format

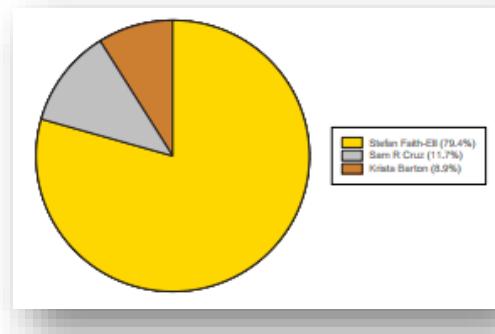
Sort Order: In which order to use the colors. Your graph is based on one or several searches (depending on graph type). If the search is ordered the first hit in the search will have the color with the lowest value. If you leave this field blank the colors will appear in random order.

When the new Color Engine is in place you can update your Color-Engine Attribute in the editor.

```
color-engine="monthsbestsalesreps:hue=Medal,luminosity=bright"
>
```

-hue=Medal (the name is case sensitive)

-luminosity=bright (set bright to get your exact color, if you chose light, it will be lighter, if you chose dark, it will be darker.)



Report 360

DepthBarGraph From a Single Search

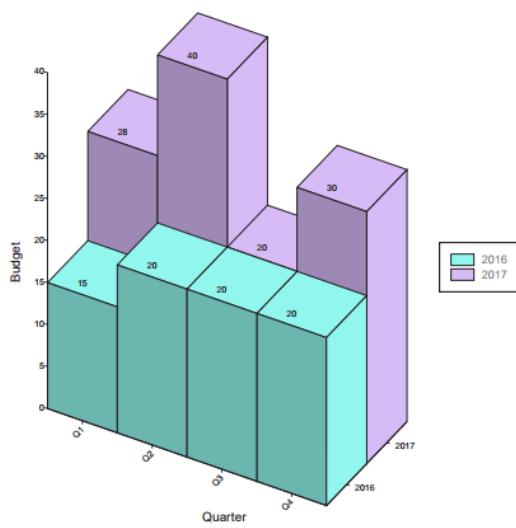


Table of Content:

DepthBarGraph from Single Search	3
Color Engine	7

DEPTHBARGRAPH FROM SINGLE SEARCH

In this example we will explain how to create a Depth Bar Graph that compares budgeted meetings for two different years divided into quarters.

1. Create a Saved Search

The Saved Search should only contain three columns (naming standard is VERY important)

- name (*must be lower case*)
- name2 (*must be lower case*)
- value (*must be lower case*)

The screenshot shows the Report 360 Editor interface. On the left, the search configuration pane displays:

- Saved AVNS Budget Search**
- Budgeted Meetings 2016-2017**
- Save & Run**, **Cancel**, **Reset**, **Preview**
- SEARCH TITLE ***: Budgeted Meetings 2016-2017
- ID**: customsearch307
- OWNER**: Simon Erseus
- PUBLIC** checked
- AVAILABLE AS LIST VIEW** unchecked

On the right, the results pane shows a table titled "Budgeted Meetings 2016-2017: Results" with the following data:

NAME	NAME2	VALUE
Q1	2016	15
Q1	2017	28
Q2	2017	40
Q2	2016	20

The bottom section shows the search configuration tabs: **Criteria**, **Results** (selected), **Highlighting**, **Available Filters**, **Audience**, **Roles**, **Email**, **Audit Trail**, **Execution Log**, **Search Title Translation**. The **Results** tab contains:

- SORT BY**: First date in period (selected), DESCENDING checkbox
- THEN BY**: (empty dropdown), DESCENDING checkbox
- THEN BY**: (empty dropdown), DESCENDING checkbox
- Remove All**, **Add Multiple**
- OUTPUT TYPE**: Normal (selected)
- SHOW TOTALS** checkbox
- MY PREFERRED SEARCH RESULTS** checkbox

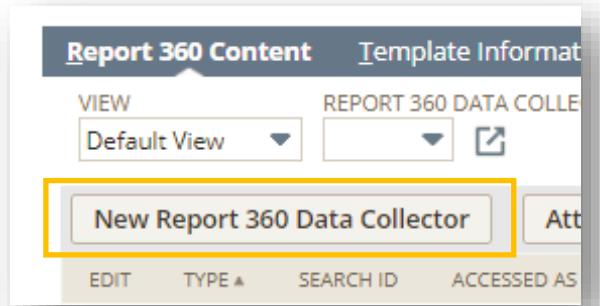
The **Criteria** tab lists search fields:

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL
:: Formula (Text)	Group	'Q'	'Q' TO_CHAR((custrecord_avbu_first_date_in_period),'Q')		name		
:: Formula (Text)	Group	TO_CHAR	TO_CHAR((custrecord_avbu_first_date_in_period),'YYYY')		name2		
:: Budget Number	Sum				value		value

Notice that in this example the search is a grouped search and therefore the search must have a summary label. If your search result needs to be grouped or summarized in some way (for example sales order amounts summarized) you must use a summary search since the Report 360 Editor and Data Collector does not summarize the data from the search.

If the sorting is of importance do not forget to sort the search using *Sort by* as shown above.

- Add the Search and Graph details via the Data Collector located at the bottom of the Report 360 Editor record.



Report 360 Content

New Report 360 Data Collector

Report 360 Data Collector

Save | **Cancel** | **Reset** | **Actions**

PARENT Budgeted Meetings 2016-2017 (DepthBarGraph)	FILTER FIELD
<input type="checkbox"/> INACTIVE	FILTER OPERATOR
TYPE Graph	FILTER VALUE
GRAPH INSTRUCTION Graph Instruction >>	FONT FILE
SEARCH ID Budgeted Meetings 2016-2017	FONTS SUBTYPE
ACCESSED AS budgetedmeetings	
RECORD TYPE	

Type: Choose *Graph*

Type of Graph: Choose *DepthBarGraphSingleSearch*

Search ID: Choose the Search that you want to use – In this example *Budgeted Meetings 2016-2017*

Max Result: To limit the result, set a number, otherwise leave blank.

Accessed As: Set a reference name for this graph (the name that will appear in the Dynamic Tag Library). Must be lower case, only alphabetic without space.

Filter Field, Filter Operator, Filter Value: The Search result can be limited and dynamic if you use the filter field. To read more about how to use filter field we refer to the User Guide.

When you are done you save the record.

3. Add the Bar Graph in the layout

Open the Report 360 Editor and place the cursor where you want to insert the graph.

```
424
425
426
427
428+
429+     td {
430+       font-size: 9pt;
431+       vertical-align: top;
432+       padding: 1px 5px 1px;
433+       <!-- background-color: #e3e3e3; -->
434+       color: #333333;
435+     }
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464+   </style>
465+   <!-- Style sheet definitions ends here -->
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760+   Budgeted Meetings<br/>
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776
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779+
780+   </body>
781+ </pdf>
```

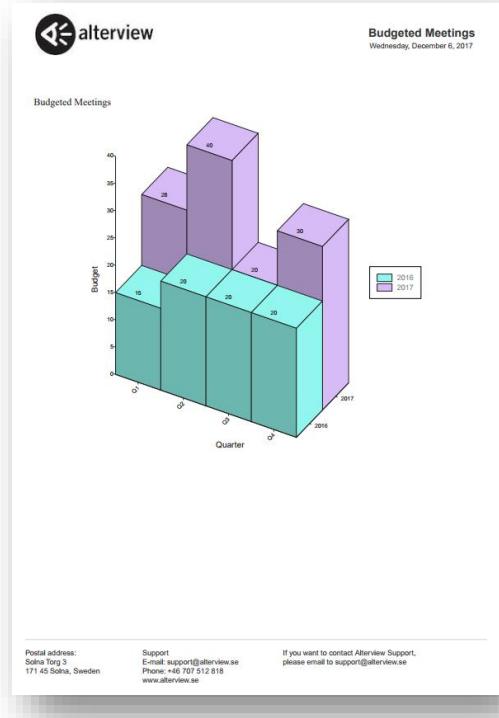
4. In the Dynamic Tag Library on the right side of the editor you will find **BUDGETEDMEETINGS** (name set by *Accessed As*) and **DEPTHBARGRAPHSSINGLESEARCH**.

Double-click on **DEPTHBARGRAPHSINGLESEARCH** to add the Bar Graph code in the editor.

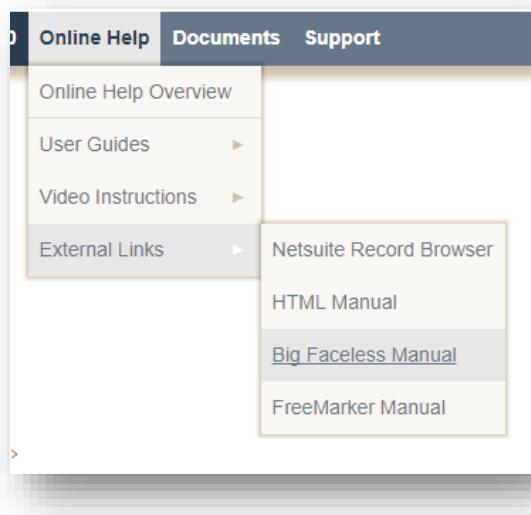
```
268 <kdepthbargraph
269   width="400"
270   height="400"
271   align="center"
272   display-barvalues="top"
273   xaxis-label="x-axis label"
274   yaxis-label="y-axis label"
275   xaxis-rotate="135"
276   display-key="boxed-right"
277   display-percentage="with-key"
278   key-color="gray"
279   key-font-family="Helvetica"
280   key-font-style="normal"
281   key-font-weight="normal"
282   key-font-size="9pt"
283   keybox-border-color="black"
284   keybox-color="white"
285   xrotation="30"
286   yrotation="30"
287   color-engine="budgetedmeetings:hue=random,luminosity=light"
288 >
289 <#if budgetedmeetings?has_content>
290   <#list budgetedmeetings as item>
291     <gdata name="${item.name}" name2="${item.name2}" value="${item.value}" color ="${item.color}" ></gdata>
292   </#list>
293 </#if>
294 </kdepthbargraph>
295
```

The Depth Bar Graph attributes (orange section) can be altered to change the appearance of the graph. Tips about other useful attributes and alterations of currently used ones will be added automatically above the graph as a comment.

Click on **Save and Preview** to run the Report and view the graph.



To read more about the attributes as well as other useful attributes we refer to *Big Faceless Manual* that you will find in the main menu, under *Online Help*. In the document there is a chapter about *DepthBarGraphs*.



COLOR ENGINE

One attribute you will not find in the *Big Faceless Manual* is the *Color Engine Attribute*.

```
keybox-color="white"  
color-engine="monthsbestsalesreps:hue=random,luminosity=light"  
>
```

The Color Engine attribute has two parameters

- hue
- luminosity

The default values are

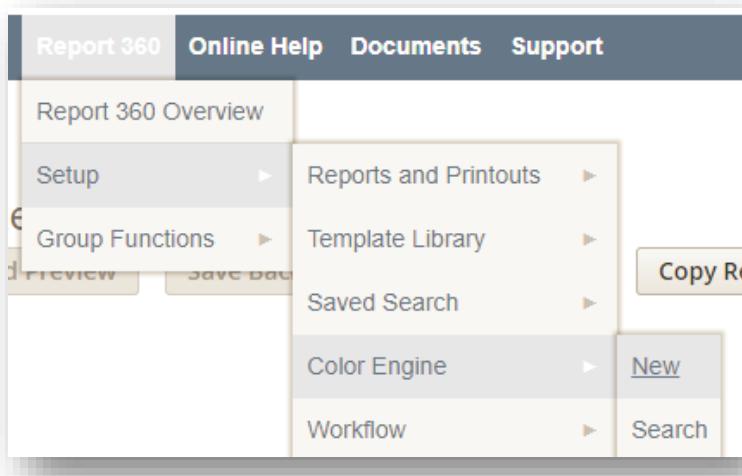
- hue=random
- luminosity=light

As you can see below there are other built-in parameters.

```
color-engine:hue=red,orange,yellow,green,blue,purple,pink,monochrome,random  
color-engine:luminosity=bright,light,dark,random
```

If none of the built-in colors works in your design you have the possibility to add your own colors

Create a New Color Engine – Report 360 – Setup – Color Engine - New



Report 360 Color Engine

Medal

Save ▾ Cancel Reset Actions ▾

NAME *
Medal

VIEW REPORT 360 COLOR ENGINE COLORS
Default View ▾

New Report 360 Color Engine Colors			Attach	Customize View
EDIT	NAME	HEX COLOR CODE	SORT ORDER ▾	
Edit	Gold	#FFD700	1	
Edit	Silver	#C0C0C0	2	
Edit	Bronze	#CD7F32	3	

Save ▾ Cancel Reset Actions ▾

In above example we have created a new color engine named *Medal*.

In the child record Color Engine Colors we have created 3 colors, Gold, Silver Bronze.

For each color you set

Name: Name of color (No space in name)

HEX Color Code: Color code in HEX format

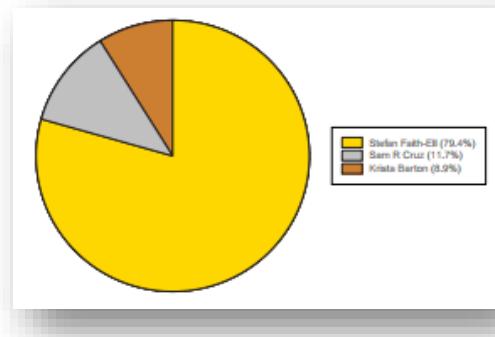
Sort Order: In which order to use the colors. Your graph is based on one or several searches (depending on graph type). If the search is ordered the first hit in the search will have the color with the lowest value. If you leave this field blank the colors will appear in random order.

When the new Color Engine is in place you can update your Color-Engine Attribute in the editor.

```
color-engine="monthsbestsalesreps:hue=Medal,luminosity=bright"
>
```

-hue=Medal (the name is case sensitive)

-luminosity=bright (set bright to get your exact color, if you chose light, it will be lighter, if you chose dark, it will be darker.)



Report 360

DepthBarGraph From Multiple Searches

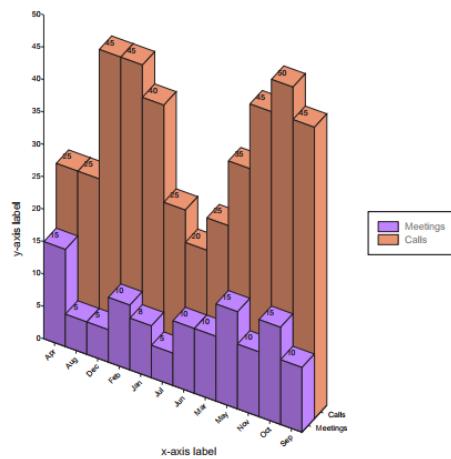


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DEPTHBARGRAPH FROM MULTIPLE SEARCHES

In this example we explain how to create a Depth Bar Graph that lists an employee's budgeted sales activities per month divided by activity type (meetings / phone calls).

1. Create the first Saved search (in this example *budgeted sales meetings*).

The Saved Search should only contain two columns (naming standard is VERY important)

- name (always lower case)
- value (always lower case)

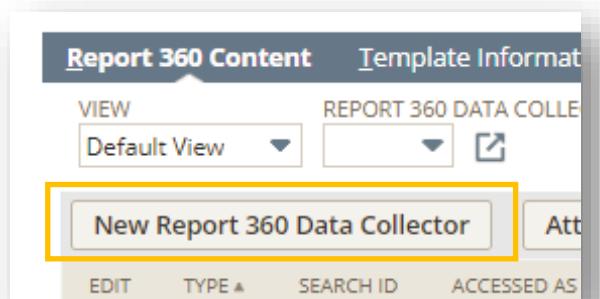
NAME	VALUE
Apr	15
Aug	5
Dec	5
Feb	10
Jan	8
Jul	5

Please note that if you are creating a summary saved search, summary labels must be used. In this example we only use the summary type = 'Group' which is why a Custom label will suffice. However, if your search result needs to be grouped or summarized in some way (for example sales order amounts summarized) you must use a summary search since the Report 360 Editor and Data Collector does not summarize the data from the search.

If the sorting is of importance do not forget to sort the search.

When the first saved search is completed, simply repeat this procedure and create the second saved search including results for *budgeted phone calls*.

2. Add the Graph details via the Data Collector located at the bottom of the Report 360 Editor record. The Searches will be added in the next step.



The screenshot shows the 'Report 360 Content' interface. At the top, there are tabs for 'Report 360 Content' and 'Template Information'. Below the tabs, there are dropdown menus for 'VIEW' (set to 'Default View') and 'REPORT 360 DATA COLLECTOR' (with a dropdown arrow). A large yellow box highlights the 'New Report 360 Data Collector' button. Below this, there are buttons for 'EDIT', 'TYPE ▲', 'SEARCH ID', and 'ACCESSION AS'. The main area is titled 'Report 360 Data Collector' and contains fields for 'PARENT' (set to 'Sales Activities per Month - Budget (DepthBar Graph, Multi Search)'), 'INACTIVE' (checkbox), 'TYPE' (set to 'Graph'), 'TYPE OF GRAPH' (set to 'DepthBarGraphMultiSearch'), 'GRAPH INSTRUCTION' (link to 'Graph Instruction >>'), 'SEARCH ID' (dropdown menu), 'ACCESSION AS' (text input set to 'salesactivitiesbudget'), 'RECORD TYPE' (dropdown menu), and several empty input fields for 'RECORD ID', 'FILTER FIELD', 'FILTER OPERATOR', 'FILTER VALUE', 'FONT FILE', and 'FONTS SUBTYPE'.

Type: Choose *Graph*

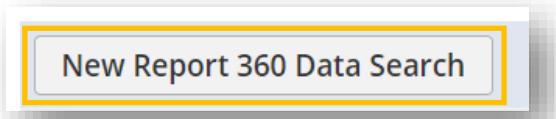
Type of Graph: Choose *DepthBarGraphMultiSearch*

Accessed As: Set a reference name for this graph (the name that will appear in the Dynamic Tag Library). Must be lower case, only alphabetic without space.

When you are done you save the record.

3. The next step is to add the saved searches to the graph.

To add a saved search, start by opening up the Data collector record you have just created and click on the button:



Search: Select the first saved search you have created

Sort Order: Decide the order in which the results will show in the graph

Accessed As: Set a reference name for this search. The name will appear as a reference in the editor

Filter Field, Filter Operator, Filter Value: The Search result can be limited and dynamic if you use the filter field. To read more about how to use filter field we refer to the User Guide.

Title: The title of the search will be shown in the graph to describe what the search's results show, in this example the *Phone Calls*.

Default Value for Missing Points: If the search is missing results for a specific point in the graph, a default value can be set. If field is empty, 0 is used as default value.

Max Results: To limit the result, set a number, otherwise leave blank.

The screenshot shows the "Report 360 Data Search" configuration dialog box. It has several sections: "INACTIVE" checkbox, "PARENT" dropdown (set to "594"), "SEARCH" dropdown (set to "Phone Calls per Month - Budget"), "SORT ORDER" dropdown (set to "1"), and "ACCEDED AS" input field ("callsbudget"). On the right side, there are fields for "TITLE" ("Calls"), "FILTER FIELD", "FILTER OPERATOR", "FILTER VALUE", "DEFAULT VALUE FOR MISSING POINTS", and "MAX RESULTS". Buttons at the top include "Save", "Cancel", "Reset", and "Actions".

Repeat this procedure to add the second saved search.

4. Add the DepthBar Graph in the layout

Open the Report 360 Editor and place the cursor where you want to insert the graph.

The screenshot shows the Report 360 Editor interface. On the left is the code editor with some CSS and HTML snippets. On the right is the Dynamic Tag Library, which is a list of available tags. The 'DEPTHBARGRAPHMULTISEARCH' tag is highlighted with a yellow box.

```

244     background-color: #e6e6e6;
245     color: #333333;
246   }
247
248   td {
249     font-size: 9pt;
250     vertical-align: top;
251     padding: 1px 5px 1px;
252     <!-- background-color: #e6e6e6; -->
253     color: #333333;
254   }
255
256
257
258
259 </style>
260 <!-- Style sheet definitions ends here -->
261
262 </head>
263 <body header="pageHeader" header-height="${cHeaderHeight}${Unit}" footer="pageFooter" footer-height="${cFooterHeight}${Unit}"
264   padding="0" margin="${PMTop} ${PMRight} ${PMBottom} ${PMLeft}" size="A4" >
265
266   Sales Activities per Month - Budget <br/>
267
268
269
270
271   </body>
272 </pdf>

```

In the Dynamic Tag Library on the right side of the editor you will find the **SALESACTIVITIESBUDGET** (set by Accessed As) and **DEPTHBARGRAPHMULTISEARCH**.

Double-click on **DEPTHBARGRAPHMULTISEARCH** to add the DepthBar Graph code in the editor.

The screenshot shows the Report 360 Editor code editor. A specific section of the code is highlighted with an orange box. This section contains the 'depthbargraph' tag with various attributes like width, height, align, etc., and a conditional block for 'salesactivitiesbudget'.

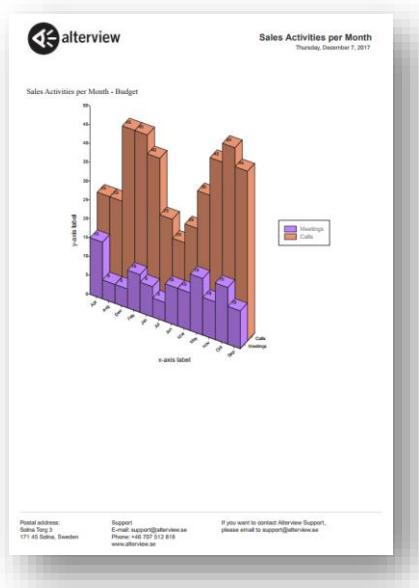
```

268 <depthbargraph
269   width="400"
270   height="400"
271   align="center"
272   display-barvalues="top"
273   xaxis-label="x-axis label"
274   yaxis-label="y-axis label"
275   xaxis-rotate="135"
276   display-key="boxed-right"
277   display-percentage="with-key"
278   key-color="gray"
279   key-font-family="Helvetica"
280   key-font-style="normal"
281   key-font-weight="normal"
282   key-font-size="9pt"
283   keybox-border-color="black"
284   keybox-color="white"
285   xrotation="30"
286   yrotation="30"
287   color-engine="salesactivitiesbudget:hue=random,luminosity=light"
288 >
289 <if salesactivitiesbudget?has_content>
290   <list salesactivitiesbudget as item>
291     <gdata name="${item.name}" name2="${item.name2}" value="${item.value}" color="${item.color}" ></gdata>
292   </list>
293 </if>
294 </depthbargraph>
295

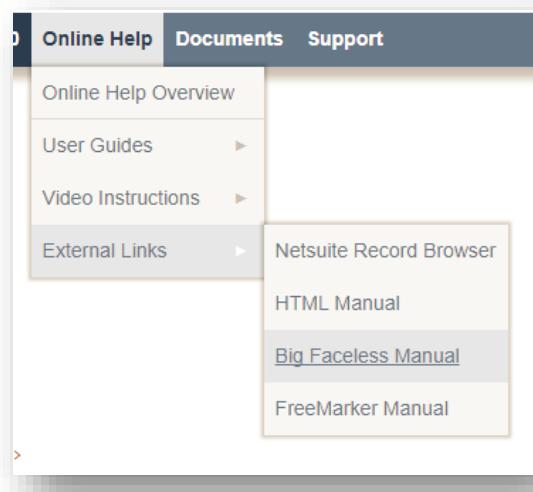
```

The DepthBar Graph attributes (orange section) can be altered to change the appearance of the graph. Tips about other useful attributes and alternations of currently used ones will be added automatically above the graph as a comment.

Click on *Save and Preview* to run the Report and view the graph.



To read more about the attributes as well as other useful attributes we refer to *Big Faceless Manual* that you will find in the main menu, under *Online Help*. In the document there is a chapter about *DepthBarGraphs*.



COLOR ENGINE

One attribute you will not find in the *Big Faceless Manual* is the *Color Engine Attribute*.

```
keybox-color="white"  
color-engine="monthsbestsalesreps:hue=random,luminosity=light"  
>
```

The Color Engine attribute has two parameters

- hue
- luminosity

The default values are

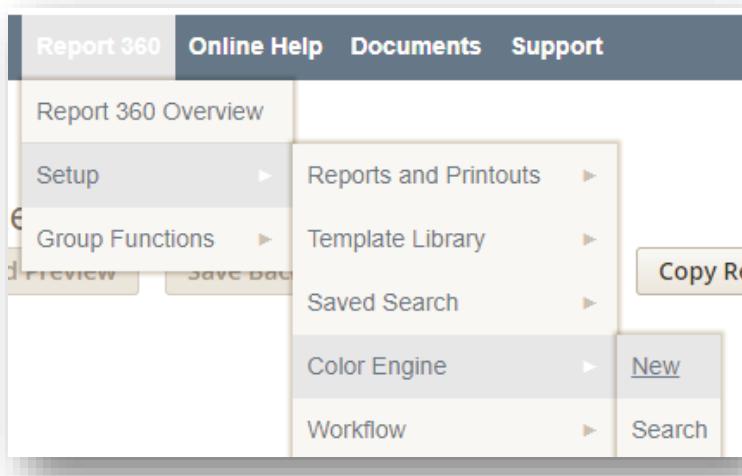
- hue=random
- luminosity=light

As you can see below there are other built-in parameters.

```
color-engine:hue=red,orange,yellow,green,blue,purple,pink,monochrome,random  
color-engine:luminosity=bright,light,dark,random
```

If none of the built-in colors works in your design you have the possibility to add your own colors

Create a New Color Engine – Report 360 – Setup – Color Engine - New



Report 360 Color Engine

Medal

Save Cancel Reset Actions ▾

NAME *
Medal

VIEW REPORT 360 COLOR ENGINE COLORS
Default View ▾

New Report 360 Color Engine Colors			Attach	Customize View
EDIT	NAME	HEX COLOR CODE	SORT ORDER ▾	
Edit	Gold	#FFD700	1	
Edit	Silver	#C0C0C0	2	
Edit	Bronze	#CD7F32	3	

Save Cancel Reset Actions ▾

In above example we have created a new color engine named *Medal*.

In the child record Color Engine Colors we have created 3 colors, Gold, Silver Bronze.

For each color you set

Name: Name of color (No space in name)

HEX Color Code: Color code in HEX format

Sort Order: In which order to use the colors. Your graph is based on one or several searches (depending on graph type). If the search is ordered the first hit in the search will have the color with the lowest value. If you leave this field blank the colors will appear in random order.

When the new Color Engine is in place you can update your Color-Engine Attribute in the editor.

```
color-engine="monthsbestsalesreps:hue=Medal,luminosity=bright"
>
```

-hue=Medal (the name is case sensitive)

-luminosity=bright (set bright to get your exact color, if you chose light, it will be lighter, if you chose dark, it will be darker.)

