

## Quickly Find the Right Reports and Build New Reports with the **Report Management and Editor!**

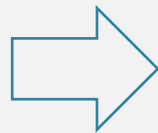
### **HOW DOES THE REPORT MANAGER AND EDITOR WORK?**

- The Report Manager is a search and preview interface which helps you find Saved Reports or Templates
- The Report Editor lets you select the dimensions and measures you need to build exactly the report you want.
- Use the Report Editor to preview and run reports, all in one interface.

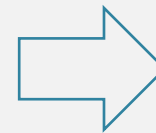
### **WHAT CAN THE REPORT MANAGER AND EDITOR DO FOR ME?**

- Save you time when locating existing reports or templates
- Provide you with an intuitive way to build new reports easily
- Visualize your reports before you run them, so you know exactly what you are getting.

**Search for  
Saved  
Reports  
and  
Templates**



**Customize  
Your  
Reports  
and Filters**



**Run the  
Report!**



## Report Management and Editor Quick Reference

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**Note:** Advanced Reports are not currently supported in Report Management or the Report Editor

See the [OpenAir Admin Guide](#) for more details

### Report Management – Saved Report/Template Preview

Quickly search for reports and templates which meet your needs. Located under Reports > Management

Click the "New" or "Edit" button here to enter the Report Editor and customize your report!

The **Report rating** appears in the top left corner, next to the **Report name**.

**Category** — indicates whether the result is a Saved, Template, or Shared report

**Type** — indicates whether the result is a Tabular or Crosstabbed report

**Template (Saved or Shared report results only)** — the name of the template the saved report is based on

**Owner** — the owner of the report

**Created** — the date the report was created

**Last saved** — the date when the report was last saved

**Last view** — the date when the report was last viewed

**Duration** — the time it took to run this report the last time

**Total views** — total views by everyone who has view rights for these reports

**Scheduled** — indicates if the report is scheduled to be run at a specific time and the schedule is active

**Folder** — indicates which folders this report is located in

**Shared with** — indicates who this report has been shared with

**Note / description** — note or description of the saved report

**Template specification (Templates only)** — provides additional information about the selected template

Marc Collins Administrator

10 | 2.5 Planned vs. Actual Hours

Edit

Category: Saved

Type: Crosstabbed

Template: -

Scheduled: -

Folder: 2. Project Administration & Management

Owner: Collins, Marc

Created: 11/22/13

Last saved: 11/19/13

Shared with: -

Note / description: PM

Last view: 11/22/13

Duration: 0

Total views: 120

Company/Project/Employee	MAY-2015		JUN-2015		JUL-2015		AUG-2015
	Projects - All assigned hours	Timesheets - All hours	Projects - All assigned hours	Timesheets - All hours	Projects - All assigned hours	Timesheets - All hours	Projects - All assigned hours
3 rows	0	0	0	0	0	0	0

See a layout preview of the template or saved report here

**Note:** Advanced Reports are not currently supported in Report Management or the Report Editor

See the [OpenAir Admin Guide](#) for more details

### Report Editor – Crosstabled Reports

Quickly create and edit reports using drag-and-drop functionality

The screenshot shows the OpenAir Report Editor interface. The top navigation bar includes 'Management', 'Advanced', 'Saved reports', 'Status', and 'Options'. The user is logged in as 'Marie Porter' with the role 'Project manager'. The report is titled 'Untitled' and is a 'Crosstabled > Account-wide > by Company' report.

Callouts provide the following instructions:

- Search for dimensions and measures. Point to Dimensions, Measures, or Rows to see a symbol legend.** (Points to the search bar in the Dimensions section)
- Click or drag dimensions to rows and measures to columns.** (Points to the Dimensions list)
- Drag existing row and column elements to rearrange them.** (Points to the 'Company' element in the Rows list)
- Preview your report with one record, or run it with all records.** (Points to the 'Run' and 'Preview' buttons)
- Click here to add filters limiting which data is reported.** (Points to the '+ Filters' button)
- Save the report** (Points to the 'Save' button)
- View your report on the same screen as the editor.** (Points to the report preview table)

The interface includes the following sections:

- Dimensions (Available sub-totals):** A list of dimensions including Agreement, Billable receipt, Billing rule, Booking, Booking type, Charge projection, Charge stage, Charge type, Client, Client owner, Cost center, Customer PO, Department, Employee's Status, Expense item, and Invoice.
- Rows (Selected sub-totals):** A list of rows including Company, Project manager, Project, and Employee.
- Columns:** A list of columns including Date (Monthly) and Measure names (2).
- Measures (Available values):** A list of measures including Projects - Project billing (GBP), Projects - Project billing (CAD), and Projects - Project billing (AUD).
- Report Preview:** A table showing the results of the report. The table has columns for 'Company/Project manager/Project/Employee', 'AUG-2015', and 'Projects - Project billing (USD)'. The data shows 3 rows of data.
- Filters:** A section on the right side of the interface showing filters for 'Date range: 3 Monthly periods ending today' and 'Project stage (4)'.

**Note:** Advanced Reports are not currently supported in Report Management or the Report Editor

See the [OpenAir Admin Guide](#) for more details

### Report Editor – Crosstabbed Reports

Quickly create and edit report using drag-and-drop functionality

Measure and Dimension Icons	
Icon	Description
	Dimension - text
	Dimension - hierarchy
	Measure - count, total
	Measure - calculated from days
	Measure - calculated from hours
	Measure - custom calculation
	Available dimensions and measures
	Selected dimensions, dates, and filters
	Selected measures

Action Icons for Modifying Dimensions or Measures	
Icon	Description
	Add dimension
	Modify dimension
	Delete dimension
	Add filters to dimension
	Suppress dimension
	Suppress total

Click here to name your report (default is "Untitled").

Click here to select a new report template.

Show or hide editor elements, or click "Settings" for more customization.

The screenshot shows the Honeycomb Services Report Editor interface. The top bar includes the Honeycomb logo and a 'Management' button. Below the bar, the report title is 'Untitled'. A green plus icon is used to name the report, and a dropdown menu is used to select a new report template. The main area is divided into sections: 'Dimensions' (Available sub-totals), 'Rows' (Selected sub-totals), 'Columns', and 'Measures' (Available values). The 'Dimensions' list includes Agreement, Billable receipt, Billing rule, Booking, Booking type, Charge projection, Charge stage, Charge type, Client, Client owner, Cost center, Customer PO, Department, Employee's Status, Expense item, and Invoice. The 'Rows' list includes Company, Project manager, Project, and Employee. The 'Columns' section shows Date (Monthly) and Measure names (2). The 'Measures' section shows project billing (GBP) and project billing (CAD).

**Note:** Advanced Reports are not currently supported in Report Management or the Report Editor

See the [OpenAir Admin Guide](#) for more details

### Report Editor Screen – Tabular Reports

Create and edit tabular reports and convert to a crosstabbed-like layout

The screenshot shows the OpenAir Report Editor interface. The top navigation bar includes 'Management', 'Advanced', 'Saved reports', 'Status', and 'Options'. The user 'Marc Collins - Administrator' is logged in. The report is titled 'Untitled' and is currently in 'Tabular' mode with 'Timesheets > Time entries' selected. A 'Rollup' checkbox is visible. The left sidebar contains 'Attributes' and 'Columns' sections. The 'Attributes' section lists various client-related attributes. The 'Columns' section lists various time entry attributes. The main area shows a preview of the report with columns: Date, Timesheet name, Client, Service, and Time type. The preview shows 3 rows of data. Callouts provide instructions on how to use these features:

- Click here to name your report (default is "Untitled").
- Search for Attributes. Point to Attributes to see a symbol legend.
- Click or drag attributes to columns here. Drag existing elements to rearrange them.
- Check the Rollup box to convert your tabular report to one resembling a crosstabbed layout. Attributes are converted to dimensions and measures.
- Drag existing elements to rearrange them.
- Preview your report with one record, or run it with all records.
- Click here to add filters limiting which data is reported.
- Save the report
- View your report on the same screen as the editor.

**Note:** Advanced Reports are not currently supported in Report Management or the Report Editor

See the [OpenAir Admin Guide](#) for more details