CPD Online

Report Manager Training Series

Part 1

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CUNA

Credit Union National Association

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This guide is Part 1 of a three-part series teaching how to effectively use Report Manager. In this Part 1 of the series, you will:

- ✓ Become familiar with the Report Manager user interface
- ✓ Know how to organize reports
- ✓ Understand viewability of reports and report data
- ✓ Practice simple report manipulation

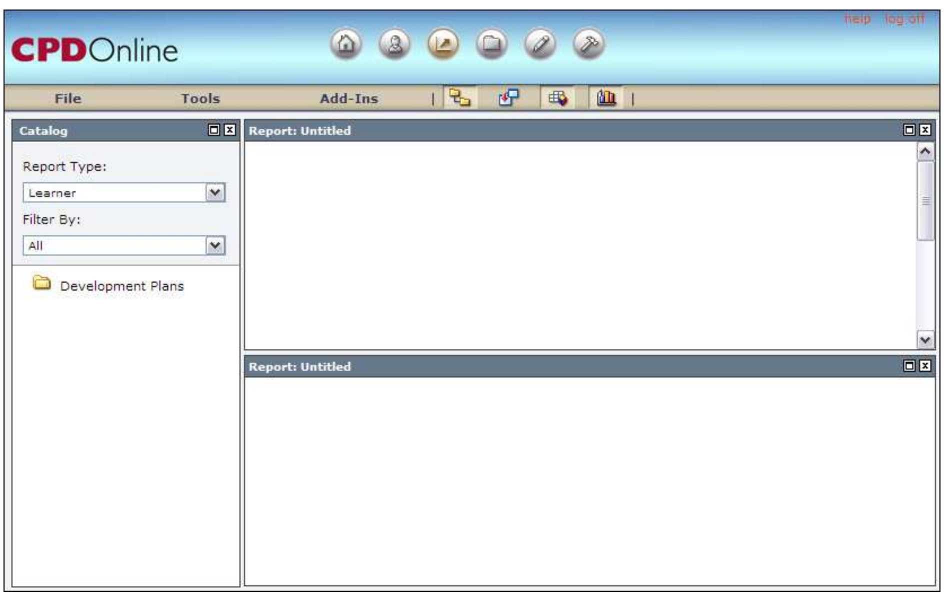
HINT- These are hints and best practices for students.

Introduction to Report Manager

Explore the User Interface

Let's look at the Report Manager interface to become familiar with the components. This section provides a brief understanding of the interface which is discussed in more detail throughout this series of Report Manager Guides.

1. Log in CPDOnline using your Credit Union Administrator password.
2. Click the Report Manager mode icon  at the top of your screen.
3. The Report Manager tutorial automatically opens. For now, close it.

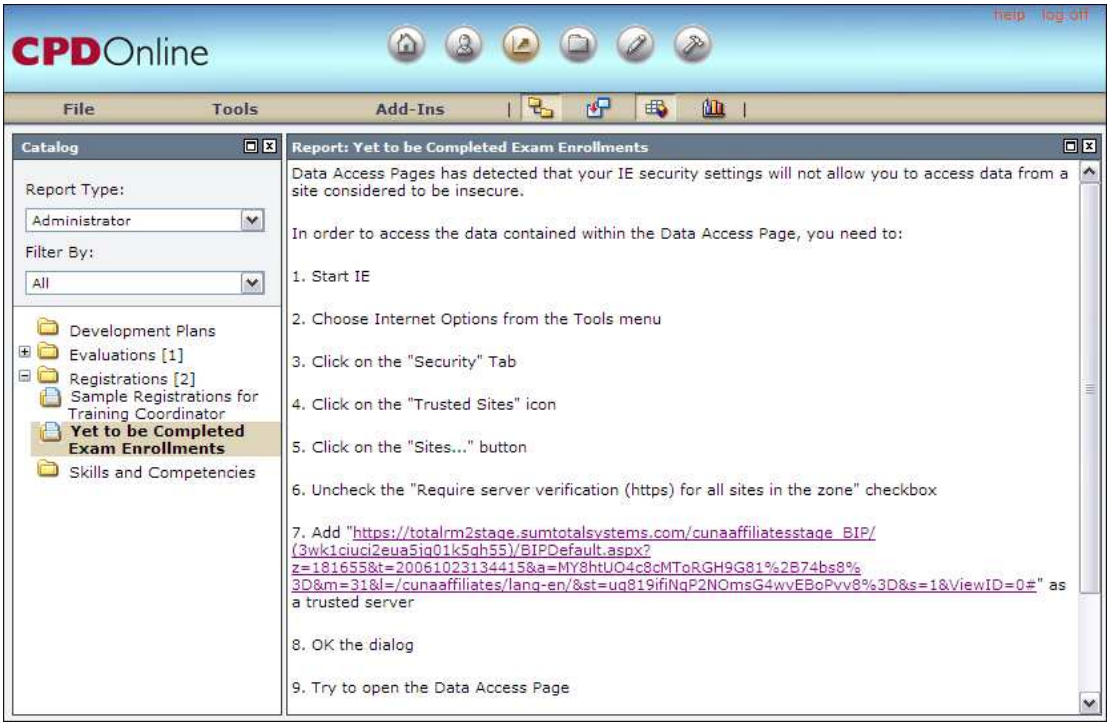


Run Existing Report

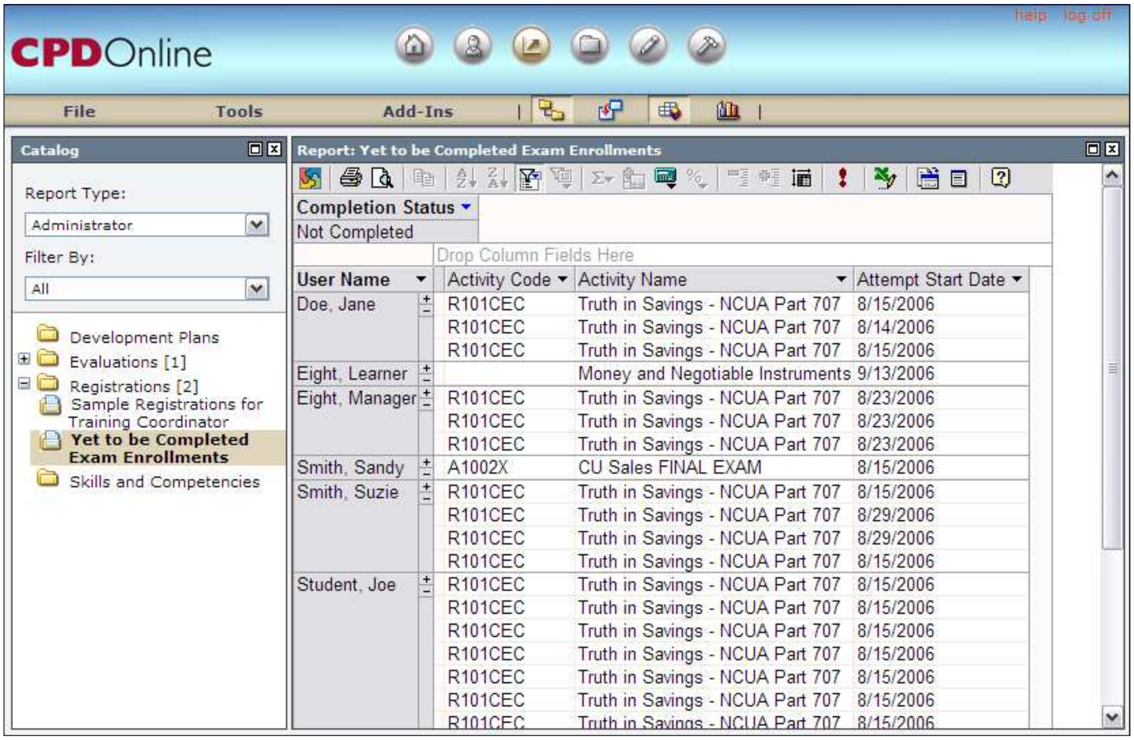
The Report Manager screen has three areas. At the far left is the Catalog area. At the far right is the Report Area where the reports can be views as text and numbers and/or graphically. Across the top is the beige Menu bar.

1. Under Report Type, choose Administrator.
2. Click the plus sign next to the Registrations folder then choose Yet to be Completed Exam Enrollments report.

HINT You may see this message. This simply means that the browser must be set up to accept data to pass freely from the server to the local machine. This message will appear the very first time a machine is used to access Report Manager. If this message appears, follow the simple steps outlined in the error message.



3. The report appears.



Catalog Area

The Catalog area displays the Report Type, Filter By, and Folders. Report types categories items. Report type drives the set of folders and therefore the reports available. Although any report may be placed under any report type, reports should be placed in the report type that makes most sense.

The Filter By drop down list box controls what the reports are viewed below – all, public only, private only, or by name (which allows for a search for words contained in the report name).

The folders further categorize the reports.

Report Area

Half of the Report Area (by default the top half) will display the text and numbers related to the report. The other half of the Report Area (by default the lower half) can display the report graphically such as by bar chart or pie chart. The report may be manipulated in either area; a change in one area is reflected automatically in the other.

Top Menu Bar

The top menu bar is used to perform tasks such as saving the report, importing reports, or set preferences. We'll go into more detail later.

Also on the top menu bar are icons that control how Report Manager is displayed.

Shows or hides the Catalog area of Report Manager.

 Shows or hides an Add-In area of Report Manager.

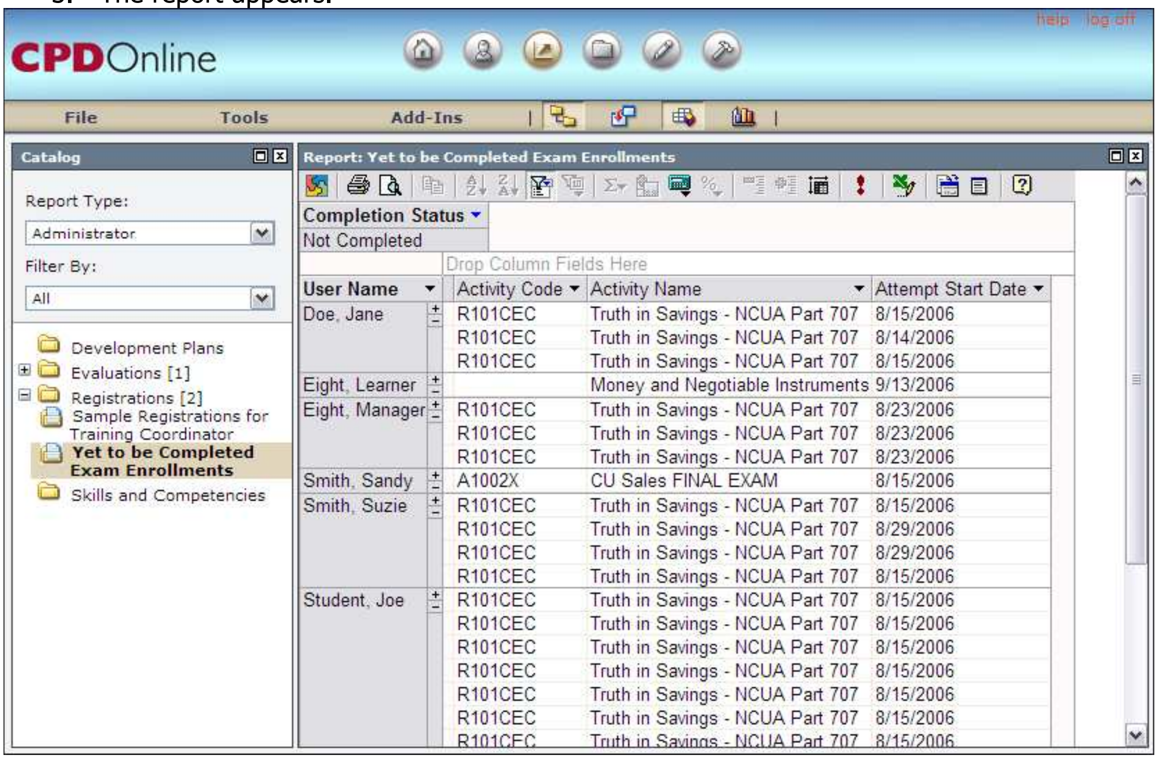
 Shows or hides the text and numbers area of the report.

 Shows or hides the graphical area of the report.

Report Area Toolbar

Let's explore the buttons at the top of the report area. First, start by running an existing report.

1. Under Report Type, choose Administrator.
2. Click the plus sign next to the Registrations folder then choose Yet to be Completed Exam Enrollments report.
3. The report appears.



HINT What is in focus (clicked on) or selected in the report area makes buttons on the toolbar enabled or disabled.

Below is each icon with a description of their function. As this series of Report Manager courses progresses, you will learn more about these controls.

About – displays information about Microsoft Office Web Component (OWC) including version installed.
Print – prints the report.
Print Preview – allows a preview of the report before printing (using Microsoft Excel).
Copy – allows you to copy a set of reports.
Sort Ascending – sorts records in an ascending (A to Z) order.
Sort Descending – sorts records in a descending (Z to A) order.
AutoFilter – toggles between showing all data and showing only filtered data.
Show Top/Bottom Items – Shows a specified percentage or number on top or on bottom of the list.
AutoCalc – allows creation of total fields such as the sum, count, minimum, maximum, etc.
Subtotal – Hides or shows the subtotals or grand totals for a column or row.
Calculated Totals – allows you to specify a computation to display on the report.
Show As – Shows values as a percentage rather than a number.
Collapse – Hides lower level items for a column or row.
Expand – Shows lower level items for a column or row.
Show/Hide Details – Hides or displays details for a column or row.
Refresh – refreshes the report. May take several minutes depending on the report and the report cannot be interacted with while refreshing.
Export to Excel – exports data to an Excel spreadsheet.
Commands and Options – opens or closes the Commands and Options window.
PivotTable Field List – opens or closes the Pivot Field List.

- Pivot Table Help – opens or closes the help specific to creating and modifying pivot tables.

Arranging Reports

Let's explore the different ways you can organize reports including creating a report type and a new folder. We'll also discuss public v. private reports and what data you or others may see in reports.

Report Types

Four report types are created by default – Learner, Instructor, Manager, and Administrator. You are able to create you own private Report Type.

1. Under the File menu, choose New, then choose Report Type.
2. Type a unique report type name (add initials and an underscore to the front of the report type name) and click Add.
3. Click Close.
4. Notice a new report type displays in the Report Type drop down list box. This is a private report type which means only you can see it.

Create your own Folder

You may also create your own private folder.

1. Choose the Report Type in which the new folder should be created.
2. Under the File menu, choose New, then choose Folder.
3. Type a unique folder name (add initials and an underscore to the front of the folder name) and click Add.
4. Click Close.

Private v. Public Reports

Above, we have mentioned that report types or folders may be private. You have permissions to create new report types, folders, and reports as well as the ability share them with other users. You determine who can view these items by defining the users who will be the audience. How to do this is covered in Part 2 of the Report Manager Series.

Viewable Report Data

Credit Union Administrators (CU Admins) can view everyone in their Credit Union. This means that if a CU Admin runs a report to see who has completed a certain learning activity, the only people who appear in the report are people in their credit union. The CU Admin cannot see people from another credit union even though they have also completed that same learning activity.

Additionally, CU Admins can see only learning activities of the type:

- ✓ CU Express Activity
- ✓ CUNA Course
- ✓ CUNA Exam

If a CU Admin runs a report on all learning activities, only the learning activities of the above types will appear, no others. For example, if a CU Admin runs a report to see user who have completed learning activities in the last month, the report will only display learning activities of the three types listed above even though learners they are allowed to see have completed other kinds of learning activities. If reports are run for learning activities of another type, no data appears. You are able to show your result data to others which is discussed in Report Manager Training Part 3.

Simple Report Manipulation

Let's make some modifications to an existing report by moving some report objects around then adding a field and using it as a filter.

Move Report Objects

If it is not open already, open the report "Yet to be Completed Course Enrollments."

1. Under Report Type, choose Administrator.
2. Click the plus sign next to the Registrations folder then choose Yet to be Completed Exam Enrollments report.
3. The report appears.
4. Try moving objects around on the screen.
5. Try removing the Registration Status field off the report.

Add Filters and/or Fields Using PivotTable Field List

<u>Replace the Registration Status Field</u>

Let's replace the Registration Status field as a filter.

1. Click the PivotTable Field list icon on the tool bar. This field list shows all the fields available to use within this report. Fields not in this list are not available to use in this report.

   HINT The PivotTable Field list appears at first to be in alphabetical order, but it is not.

2. Be sure the Registration Status field is removed. To remove it, scroll to about the middle of the PivotTable Field list, select Registration Status and drag and drop that onto the filters area just below the toolbar.

<u>Add a New Filter</u>

Scenario: Let's say you now need to filter by manager. This means the Manager Name field must become a filter for the report.

1. In the PivotTable Field list, find and select Manager Name.
2. Drag and drop Manager Name into the filter area just under the toolbar in the report area.
3. Click the down arrow next to the Manager Name filter.
4. Click All. Notice that clicking all selects or deselects all options.
5. Select only a few managers and click OK. Notice the report results change from showing all users to only those users who have the manager selected above.

   HINT When a filter has specific items selected the text below the filter changes to indicate what is selected. For example, text below the Manager Name filter changes from All to (Multiple Items). Additionally, the arrow icon next to the filter name changes from black to blue when a filter is applied.

6. Click the AutoFilter icon to see how it toggles from no filters to applying the selected filters.

<u>Add a New Row</u>

Let's say we'd like to add a see the user's primary job next to the user name.

1. In the PivotTable Field list, find and select User Primary Job.

2. Drag and drop User Primary Job to the left of the User Name. Be sure the blue highlight has a top and bottom horizontal line that point towards the User Name before dropping.

Conclusion

Resources: Class Series, Tutorial, and Online Help

There are three main ways to get help in Report Manager. This series of three Report Manager Guides is here to teach you the basics of using Report Manager. Whenever Report Manager is opened, the Report Manager tutorial appears. The tutorial was written by award-winning writers and is wonderfully clear and helpful; I highly recommend it, it's a fantastic tool. Online help (also written by award-winning writers) provides an excellent reference for specific questions about using Report Manager. The online help has a Contents tab based on subject, an Index tab to search by keyword, or a Search tab to search for any relevant string.

After this Part 1 of the Report Manager Series, you can now:

- ✓ Navigate the Report Manager user interface
- ✓ Organize reports
- ✓ Understand private v. public reports and viewability of report data
- ✓ Perform simple report manipulations

In Part 2 of the Report Manager Series, you will:

- ✓ Use report features such as grouping, sorting, calculating, adding totals
- ✓ Save modifications of an existing report to a new report
- ✓ Create a brand new report from scratch
- ✓ Regulate server-side filtering
- ✓ Control viewability by job, manager, or individual
- ✓ Delete reports

If you have any further questions on this material, please contact us at 800-356-9655 ext. 4072 or via e-mail at CPDOnline@cuna.coop.