

CPD Online

Report Manager Training Series Part 3

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Introduction

This is Part 3 of a three-part series teaching how to effectively use Report Manager. In Part 2 of the Report Manager Series, you learned how to:

- ✓ 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

In this Part 3 of the series, you will:


- ✓ Create a report chart
- ✓ Use the Commands and Options window
- ✓ Fine-tune the report properties
- ✓ Learn various ways to share report data including exporting to Excel
- ✓ Administer Report Manager
- ✓ Add and share report types and folders
- ✓ Set user preferences
- ✓ Discover when and why to export and import report definitions

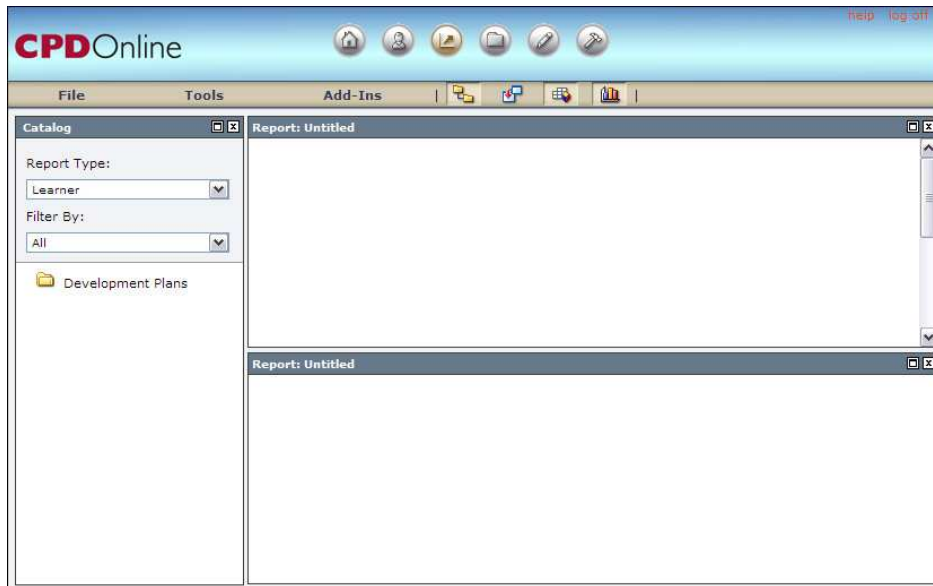
HINT- These are hints and best practices for students.

Charting Data

Open an Existing Report

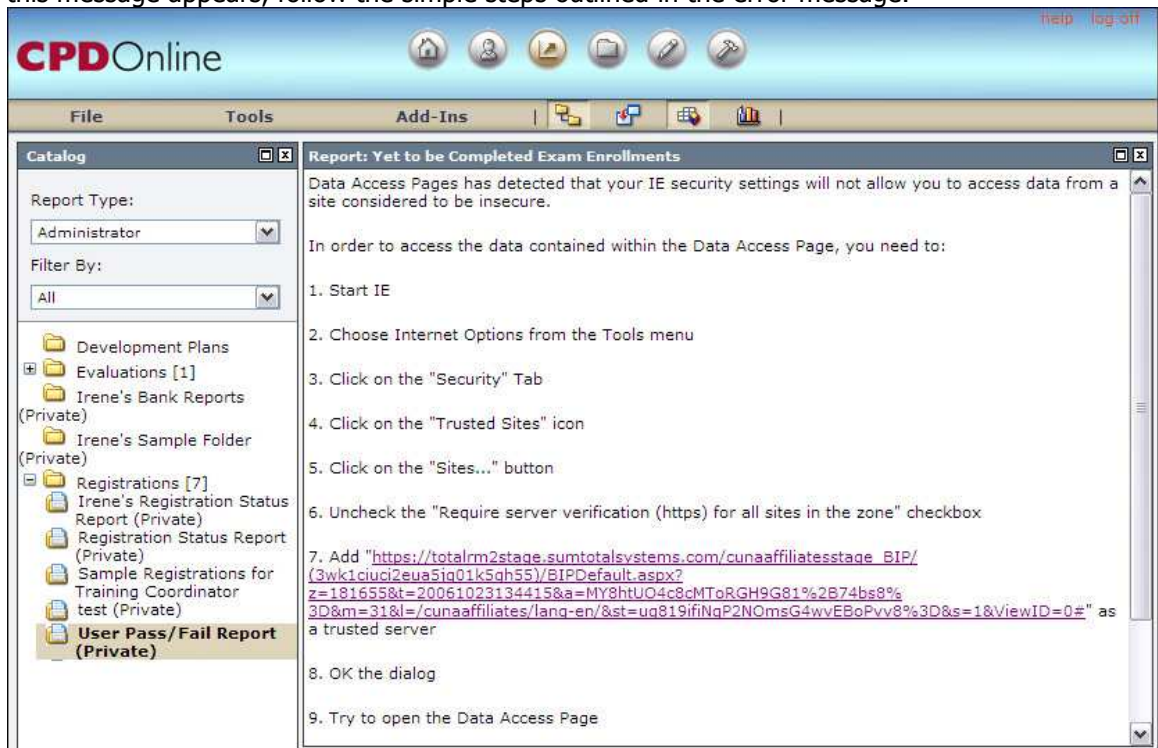
Let's begin by opening an existing report. This report has been prepared as an example where the data is complete; our goal is to create a chart for this data.

1. Click the Report Manager mode icon  at the top of your screen.
2. The Report Manager tutorial automatically opens. For now, close it.

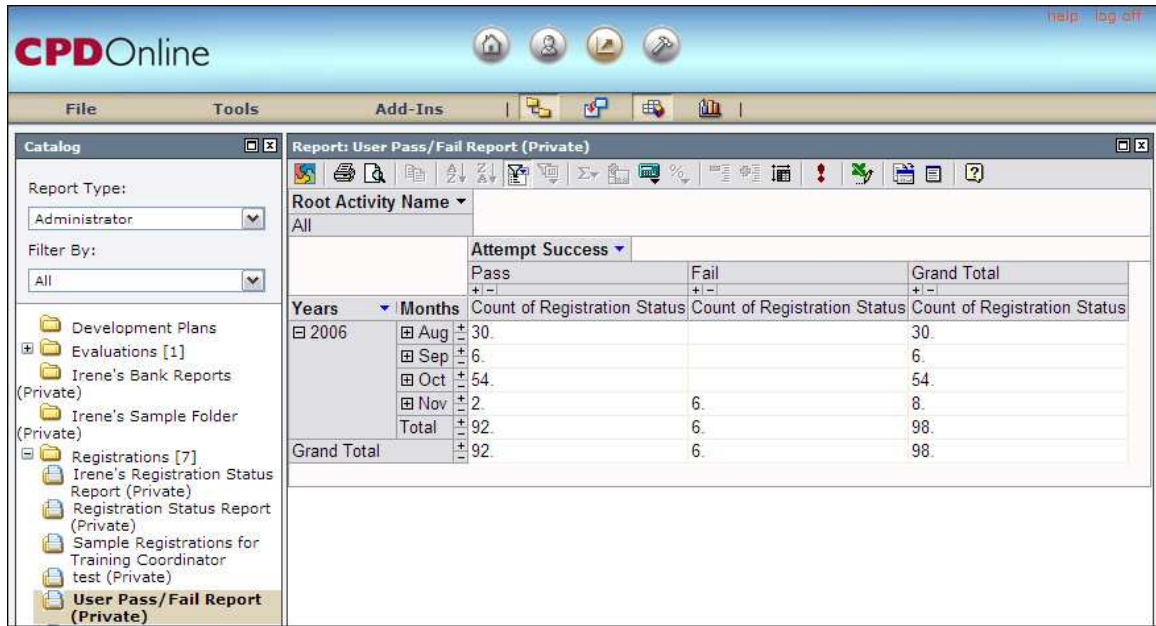


3. Under Report Type, choose Administrator.
4. Click the plus sign next to the Registrations folder then choose Pass/Fail Report by Month.

HINT You may see the error message below. 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.



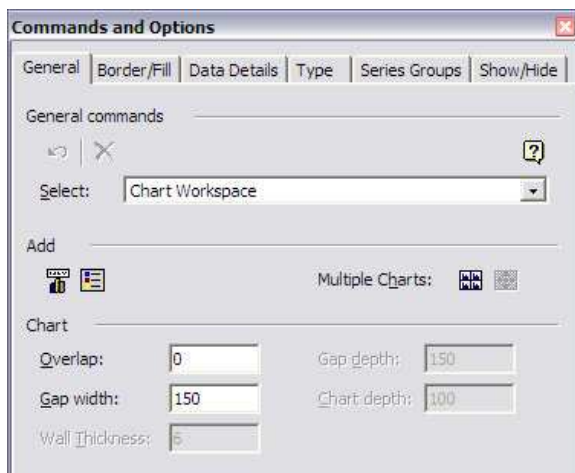
5. The report appears similar to the one shown below.



Create Report Charts

Using the existing report, let’s have the corresponding chart appear then we’ll modify it a bit.

- On the top menu bar, click the graphics button so the Chart Area of the screen appears.
- On the Chart Area toolbar, click the Commands and Options icon .



- Click the Data Details tab.
- Check the checkbox next to Plot detail records. A Microsoft Office chart prompt appears.
- Click Yes.
- Uncheck the checkbox next to Plot detail records. A Microsoft Office chart prompt appears again.
- Click Yes again. The chart redraws as desired.

Fine-Tune the Report Properties


Now that the chart has appeared, let's use the Commands and Options window to modify some of the chart properties. We cannot cover all aspects of the Commands and Options window due to time constraints, but we'll cover common tasks performed within that window to become familiar with it.

Below is an example of the result of the changes we'll make with the chart – add and format a title, modify colors and patterns of the bar chart itself, and show the legend.





Title

Add a title to the top of the chart.

1. In the Commands and Options window, click on the General tab.
2. In the middle of the dialog box, click on the Add Title button .
3. In the Chart Area itself, click on the words Chart Workspace Title.
4. In the Commands and Options window, click the Format tab.
5. Change the caption to "Attempt Success by Month in 2006."
6. OPTIONAL Change font type, font style, and color, if desired.


Colors

Change the colors used in the chart.

1. Leaving the Commands and Options window, click on the gray area of the chart.
2. Click on the Border/Fill tab.
3. Under the Fill area, click on the paintbucket icon  and choose another color such as plum.
4. Drop down the Fill Type list box and choose Gradient.
5. Leaving the Commands and Options window, double-click one of the bars that appears in the chart.
6. Under the Fill area, click on the paintbucket icon  and choose another color such as navy.

Legend

Display the legend at the middle right.

1. Hide or show the legend by clicking on the  icon on the menu bar in the Chart Area of the screen.
2. Save the New Report
Let's save this modified report under a new name (leaving it as a private report).
3. Under the File menu, choose Save As.
4. In the Report Name field, type your name then Pass/Fail Report by Month with Chart.



Save Report

To save the report, enter a report name, select the report type and folder and click Save.

Report Name:
ic_2006 User Pass/Fail with Chart

Report Type:
Administrator

Folder:
Registrations

Make this the default report in folder

HINT Be sure to provide a good name for the report. The name is what allows you (and others if it is public) to understand what this report shows and how it is different from other reports.

Sharing Report Data

Send a Report URL to Others

You can share this report with others and let them know by sending them an email containing the URL to the report. The recipient can click on the URL and view the report.

Keep in mind:

- ✓ Recipients of the email must be able to access Report Manager mode (they must enter their log on name and password) and have the appropriate role in order to view the report.
- ✓ The report must be public so others can view it.
- ✓ All the rules about data visibility apply when viewing a report through a URL. Therefore, if you can see 50 users, but the email recipient can only see 10, their report will show only those 10 users.
- ✓ The Send URL feature does not work properly with Outlook 97; you must use a more recent version of Outlook.

To mail a report URL:

1. Make sure it is a public report.
2. Under the File menu, choose Send URL. A new email message appears (using your default email client) and the body of the message contains the report URL.
3. Enter the email addresses of the recipients.
4. Change the body text as desired.
5. Send the message.

Distribute Whole Reports to Others

If your report is shared with other users who do not have the same view rights as you and they view the report online, the data displayed may be different. If you want to share the report exactly as you see it, you can print the report or export it to Excel.

1. Under the File menu, choose Print.
2. Select to print either the PivotTable or the Chart.
3. Click Print.
4. The PivotTable option exports the table to Excel. You can save the file or print using Excel's print feature.
5. The Chart option saves the chart to your local drive as an image called BIPChartImage.gif. Once you click Yes to save the image, a Print dialog box displays.

Administering Report Manager

In Report Manager, you are able to create our own report types and folders which you can leave as private or make public. We'll try doing that then try setting user preferences.

Add and Share Report Types

Let's begin by creating a new report type.

1. Under the File menu, under New, click on Report Type.
2. In the Manage Report Types window, type a new report type name (be sure to start the name with your name or initials) in the field at bottom then click Add. If you did not use a unique name, you may get an error specifying the Report Type name must be unique.
HINT Notice this is the screen where you are able to delete Report Types you own.
3. Click Close.

By default, the report type will be private. To make it public:

4. In the Report Type drop down list box, choose the newly created report type.
5. Under the File menu, choose Properties.
6. Click Show next to the newly created report type.
7. In the Report Type Properties window, uncheck Private.
8. Click Share with everyone and click Submit.
9. Click Close.

Add and Share Report Folders

Now try creating a new folder.

10. Under the File menu, under New, click on Folder.
11. In the Manage Folders window, type a new folder name (be sure to start the name with your name or initials) in the field at bottom then click Add. If you did not use a unique name, you may get an error specifying the Report Type name must be unique. **HINT** Notice this is the screen where you are able to delete Report Types you own.
12. Click Close.

By default, the folder will be private. To make it public:

13. Right-click over the newly created folder and choose Properties.
14. In the Folder Properties window, uncheck Private.
15. Click Same audience as parent and click Submit. This means the audience will be the same as the Report Type under which this folder lives.

Delete a Report Folder

To delete a report folder:

1. Right-click over the folder you just created and choose Delete. A dialog box appears asking you to confirm you want to delete.
2. Click OK. The folder is deleted.

HINT You are unable to delete folders that contain one or more reports. You must first delete the reports in the folder (which you can do only if you own those reports) before you can delete the folder itself.

Delete a Report Type

To delete a report type:

1. Under the File menu, under New, click on Report Type.
2. In the Manage Report Types window, select the newly created report type name and click Delete. A dialog box appears asking you to confirm you want to delete.
3. Click OK. The report type is deleted.

HINT You are unable to delete report types that contain one or more folders. You must first delete the folders (and to do that, you must first delete reports in the folder which you can do only if you own those reports) before you can delete the folder then the report type.

Set User Preferences

User Preferences allows you to specify the way you prefer to have the interface displayed. See the help file for a chart on each preference on the screen below. To access this screen, under the Tools menu, choose User Preferences. **HINT** You can turn on an alert to warn you of unsaved reports when you try to create a new report or access an existing report without saving the changes to the report being displayed.



User Preferences

- Synchronize Chart and Pivot Table Controls
- Show OWC Toolbar
- Show Chart Toolbar
- Use Server Formatting
- Use Server Colors
- Alert on Unsaved Reports

Access Mode: Power User

Locale: en

Save Cancel

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 are 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'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 3 of the Report Manager Series, you can now:

- ✓ Create a report chart
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- ✓ Administer Report Manager
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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.