APPENDIX F: REPORTS

ADDING A CRYSTAL REPORT TO THE FACILITYFOCUS MENU

1) Right click your mouse and select New then Crystal RPT.

2) Type the Crystal Report file name and browse for it’s location
3) Select the report.
4) Click Open.

5) The Report appears on the FacilityFocus Menu screen.
The new report will appear here. Simply double click the report to launch it.
DISPLAYING AND SELECTING A REPORT

FacilityFocus generates both on-line and printed reports. Each FacilityFocus module presents a Reports icon on the main FM screen. This icon accesses a menu that allows you to display pre-formatted reports.

**To Display The Reports Menu And Select A Report.**

1.) Click the Reports icon for any module listed on the FacilityFocus Main Menu.

2.) Click Reports in the menu bar and select a report from the drop-down list.
FACILITYFOCUS “NEW” REPORTS

Most Reports in the FacilityFocus system have been ported to the new report format and were created using Seagate's® Crystal Reports. By purchasing Crystal Reports, the user can edit reports, create new custom reports, and publish reports to the web.

When using Crystal Reports independently of FacilityFocus (to edit, customize or publish reports), Crystal requires that the user log onto the database before viewing the report. All reports run through ODBC. Successful report viewing requires that the following conditions have been set in ODBC:

- The Data Source Name must be awi.
- The User Login must be ROOT.
- The password must be root.

REPORTS THAT DO NOT YET USE THE “NEW” FORMAT

Reports dealing with Accounts Payable Setup, Accounts Payable, Work Management Standards and Lease Budget still use the “Old” format. Instructions for their use appear later in this chapter.

For all other reports, use the following instructions.
SELECTING SORT AND GROUPING CRITERIA

Some reports have grouping and sorting capabilities. If so, the Enter Parameter Values screen displays to allow you to select criteria.

1. After a report has been selected from the list, the Enter Parameter Values dialog box appears.
2. The tabs at the top of the dialog box allow you to enter values on which to group, sort and filter your report.
Some Value fields allow you to select a value from a drop-down list.

Date fields offer a drop-down calendar.
Some tabs allow you to select more than one value by selecting the value and clicking the Add button after each value.

Some tabs allow you to enter more than one value by typing the value and clicking the Add button after each value.
1. Continue to add values by clicking the tabs that are applicable to your report.
2. Click OK when you have entered all the values you want to enter. The Reports Screen displays with your selected report open for viewing.

REPORTS SCREEN FOR “NEW” REPORTS
VIEWING “NEW” REPORTS

These buttons on the toolbar above the report window allow you navigate through a multiple page report one page at a time.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>2 of 2130</th>
<th></th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th></th>
<th>displays the first page</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>displays the previous page</td>
</tr>
<tr>
<td></td>
<td>displays the next page</td>
</tr>
<tr>
<td></td>
<td>displays the last page</td>
</tr>
</tbody>
</table>

PRINTING A "NEW" REPORT

All printouts will go to the printer defined as the default printer in the Windows Print Manager.
1. Display a report.
2. Click printer ( ) at the top of the screen.

EXPORTING A "NEW" REPORT

All printouts will go to the printer defined as the default printer in the Windows Print Manager.
1. Display a report.
2. Click export ( ) at the top of the screen.
“OLD” REPORTS

Reports dealing with Accounts Payable Setup, Accounts Payable, Work Management Standards and Lease Budget still use the “Old” format. Instructions for their use appear below.

FacilityFocus’s database structure allows the creation of customized reports using ad hoc reporting applications such as Powersoft’s Infomaker and others.

SPECIFYING CRITERIA FOR RETRIEVING “OLD” REPORTS

1. After a report has been selected from the list, the Choose Filter dialog box may appear, if a filter has been defined. If so, select a filter or choose None and click OK.

2. The Specify Retrieval Criteria window may appear (depending on the report selected).

3. If it appears, enter the appropriate values for the Criteria columns into the blanks provided. (The line labeled “Or” allows you to search on more than one criterion. For example, if you enter Apples in the Schedule Description Criteria column opposite the label Criteria and Oranges in the same column next to the word OR, the System retrieves any record with Apples OR Oranges listed in the Schedule Description column.)

4. Click OK when you have entered all the values you want to enter.

5. The Reports Screen displays with your selected report open for viewing.
### REPORTS TOOLBAR FOR “OLD” REPORTS

When a report is displayed, some buttons are activated on the Reports toolbar, shown below.

Three icons on the toolbar are specific to the Reports Screen. A description of these buttons follows:

<table>
<thead>
<tr>
<th>Pointer</th>
<th>Reports Buttons</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Retrieve</td>
<td>brings up the Specify Retrieval Criteria dialog box and executes a new retrieval</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Zoom</td>
<td>allows re-sizing of the retrieved Report on the screen.</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Send</td>
<td>allows the Report to be sent through e-mail to another person.</td>
</tr>
</tbody>
</table>
REPORT MENUS FOR “OLD” REPORTS

The Report Screen menus give you various options for viewing and printing reports. The menus and a description of their menu items are listed below.

<table>
<thead>
<tr>
<th>Menus</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>File</td>
<td>Tool bar Menu. Linked to a drop-down list of commands used to manipulate the file.</td>
</tr>
<tr>
<td>Close</td>
<td>Closes the file.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Not used.</td>
</tr>
<tr>
<td>Save Rows As</td>
<td>Saves the file to a user defined name and/or extension (e.g., xls to save as an Excel file.)</td>
</tr>
<tr>
<td>Items</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>--------------------------------------------------------------</td>
</tr>
<tr>
<td>User Filter</td>
<td>Brings up the User Filter window.</td>
</tr>
<tr>
<td>Print</td>
<td>Prints the document.</td>
</tr>
<tr>
<td>Print Preview Rulers</td>
<td>Customizes the left, right, top and bottom margins.</td>
</tr>
<tr>
<td>Print Preview Orientation</td>
<td>Allows selection of page orientation (i.e. default portrait or landscape.)</td>
</tr>
<tr>
<td>Printer Set Up</td>
<td>Sets up a printer to interface with the computer.</td>
</tr>
<tr>
<td>Send</td>
<td>Connects to e-mail System.</td>
</tr>
<tr>
<td>Exit</td>
<td>Exits the file.</td>
</tr>
<tr>
<td>Edit</td>
<td>Tool Bar Menu. Not used</td>
</tr>
<tr>
<td>Display</td>
<td>Tool bar Menu. Linked to a drop-down list used to navigate from First, Next, Prior, or Last page of the document.</td>
</tr>
<tr>
<td>Items</td>
<td>Description</td>
</tr>
<tr>
<td>---------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Rows</td>
<td>Linked to a drop-down list of commands used to filter, retrieve and sort data.</td>
</tr>
<tr>
<td>Filter</td>
<td>Filters specific data for retrieval.</td>
</tr>
<tr>
<td>Retrieve</td>
<td>Retrieves specific rows of data.</td>
</tr>
<tr>
<td>Sort</td>
<td>Sorts data by ascending or descending order.</td>
</tr>
<tr>
<td>Window</td>
<td>Rearranges the window layout to Tile, Layer, or Cascade design. It is also used to rearrange Icons and select reports.</td>
</tr>
<tr>
<td>Help</td>
<td>There is no text behind the Help Screen at this time.</td>
</tr>
</tbody>
</table>
SORTING AN “OLD” REPORT

Use the Sort command to arrange rows in a list according to the contents of the columns displayed in your report. When you select Sort, FacilityFocus displays a Specify Sort Columns dialog box.

To sort rows in a report:

1. Select Sort from the Rows drop-down menu bar. The Specify Sort Columns dialog box displays a list of column headers in the box labeled Source Data. The column headers on which the report is usually sorted are listed in the box labeled Columns.
2. Select column names from the Source Data box and drag them to the Columns box.
3. Specify whether you want to sort in ascending or descending order by checking or un-checking the box labeled Ascending.
4. The order of the columns determines the precedence of the sort. To reorder the columns, drag them up or down the list. To delete a column from the sort column list, drag it outside the dialog box.
5. If you wish, specify expressions on which to sort. For example, if you have two columns, Schedule and Status, double-click on the Schedule column and modify the expression in the Modify Expression dialog box.
6. If you are specifying a sort expression as described in Step 5 above, use the Verify button to check the syntax, then click OK.
7. Click OK in the Specify Sort Columns dialog box to display the sorted rows.
FILTERING AN "OLD" REPORT

Filtering is a technique used to limit the number of rows displayed in a report. You can filter a report prior to or following the generation of a report.

For example, you could instruct FacilityFocus to display only those employees who reside in Texas by using the expression statecode = "TX." Given this expression, FacilityFocus will display only those rows containing a value of TX in the statecode column.

A filter is similar to selection criteria with one important difference. A selection criterion limits the rows retrieved from the database using the Find command. A filter limits the display of rows in the report to a subset of the rows already retrieved.

2. Select Filter under the Rows menu. The Specify Filter screen appears.

3. Enter an expression in the Expression box by clicking on the functions, columns, and operators shown in the boxes at the bottom of the screen.
4. For more complex expressions using the Functions, refer to "Infomaker 5.0 Users Guide" by Powersoft.
TO REMOVE A FILTER FROM AN “OLD” REPORT:
1. Click Filter to display the Specify Filter dialog box.
2. Delete the filter expression.
3. Click OK.

TO PRINT AN “OLD” REPORT
All printouts will go to the printer defined as the default printer in the Windows Print Manager.
1. Select a report.
2. Choose Print from the File menu.
JOB PACKAGE REPORT

The Job Package Reports screen allows you to view specific information for a Work Request(s). To print a Job Package Report:

2. From the Options drop-down menu, (shown below) select the option you desire.

3. If your option is a single Work Request, you must identify the Work Request in the Choices field either by zooming the Choice field or keying in the Work Request number. If you selected Multiple Work Requests, when you click Get Work Requests, you will access the Specify Retrieval Criteria screen used to identify which Work Requests you wish to include.
4. Identify which report you want to run from the six check boxes (shown below).
5. Click **Get Work Requests** to get the Work Request(s) you identified in step 3 above. This will list the Work Request(s) in the Work Request box.

6. The Show button will display the report(s) you selected. (The Work Request for which you want to view a report must be selected and highlighted prior to clicking the Show button).

7. The Print button will print all selected reports for a single Work Request.

8. The Print Multiple button will print all reports for all Work Requests you selected.

9. When finished viewing, click Close to exit the Job Package Reports screen.