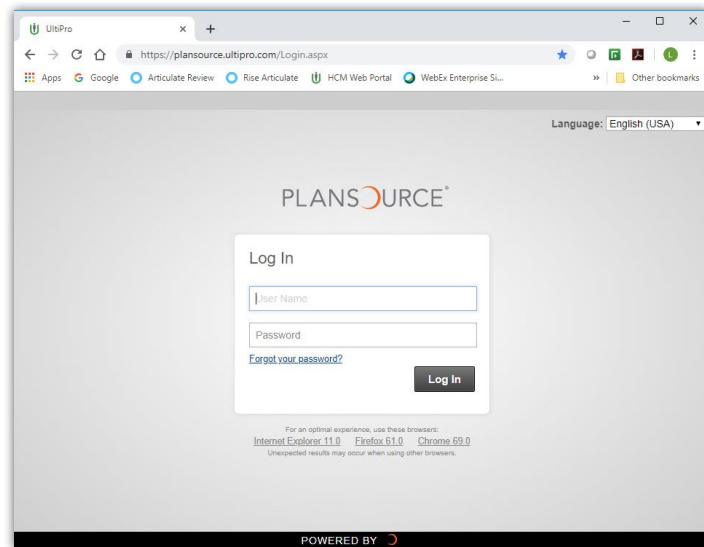# Creating a New Report in Business Intelligence

The steps below outline the process for creating a new Business Intelligence report. Most reports will be lists since they present your data in rows and columns.
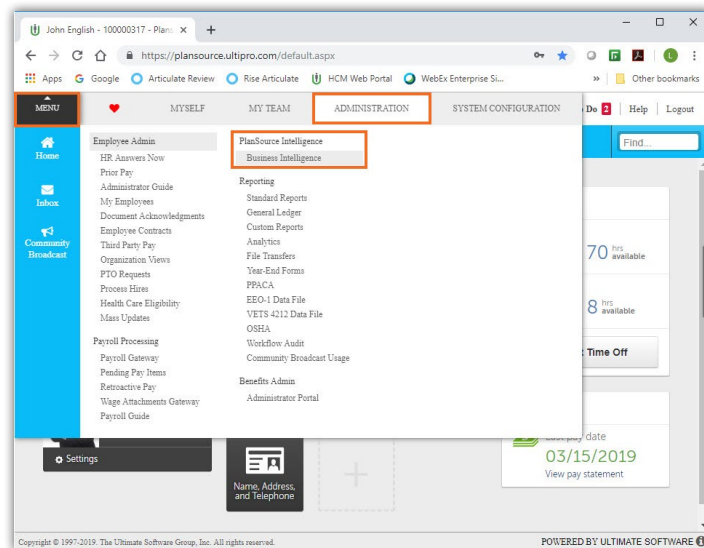
1

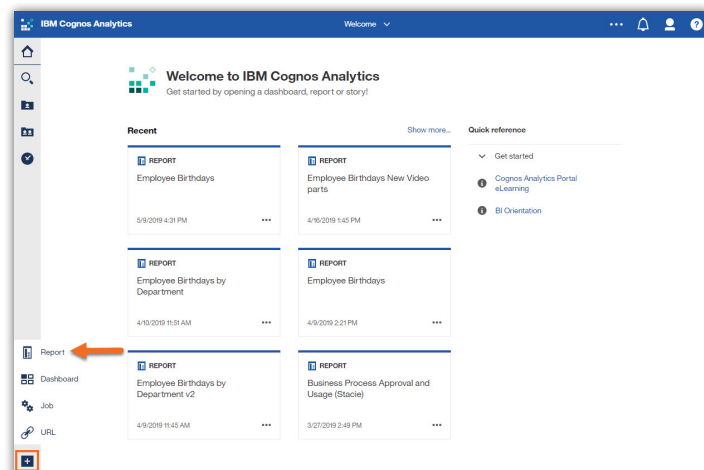Open PlanSource HCM Website and Input appropriate credentials

2

On home page, click Menu, Administration, Business Intelligence
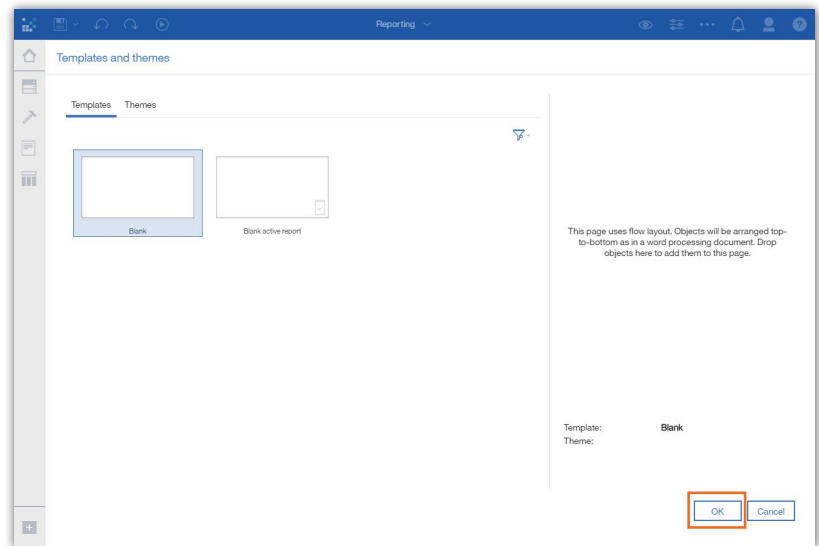
3

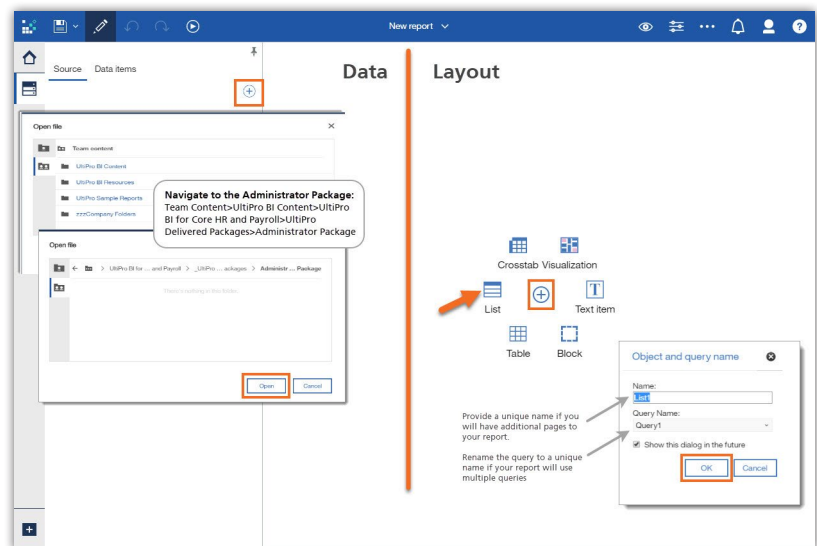Start the creation process by clicking the + button on bottom left

4 Choose a template and/or theme or leave on blank template and then click OK to open the reporting interface

5 On right side, choose a report layout and on the left side, the data package to start building your report
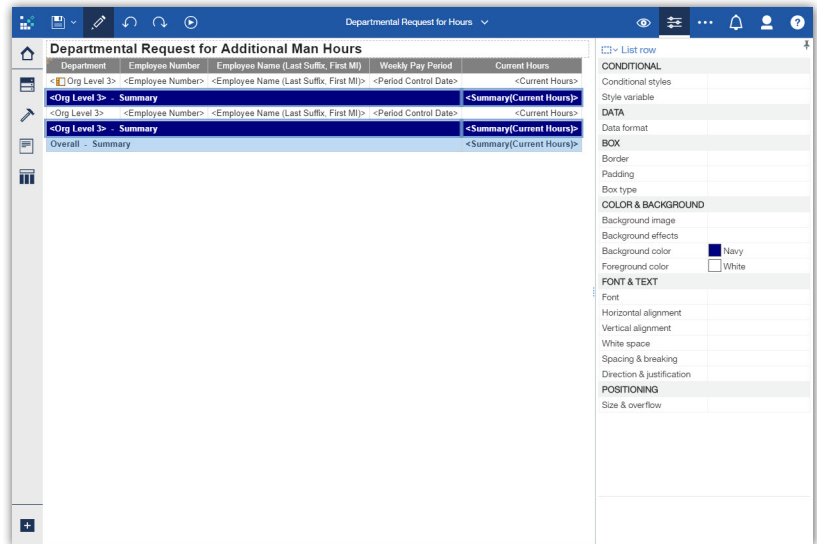

6 Using your starting workspace, add data items from the source package to your report and then organize your layout
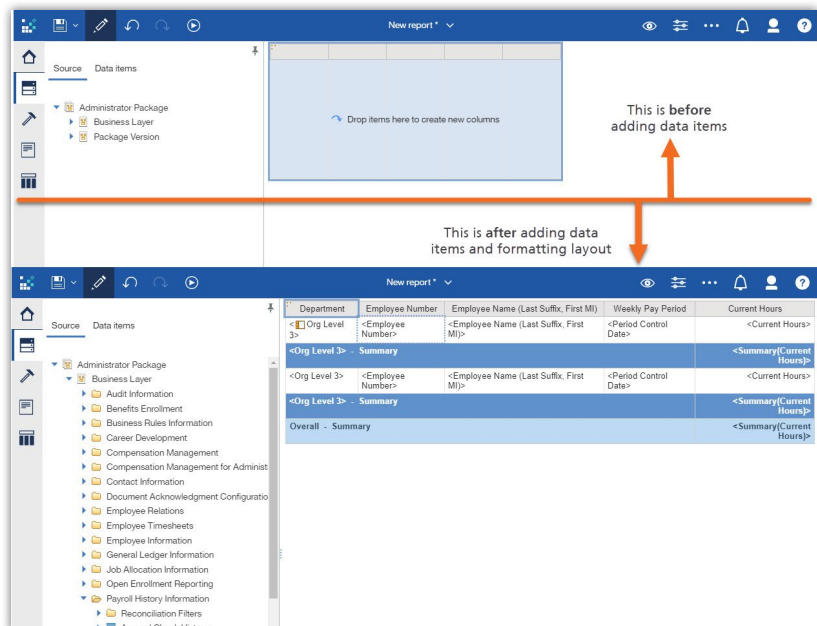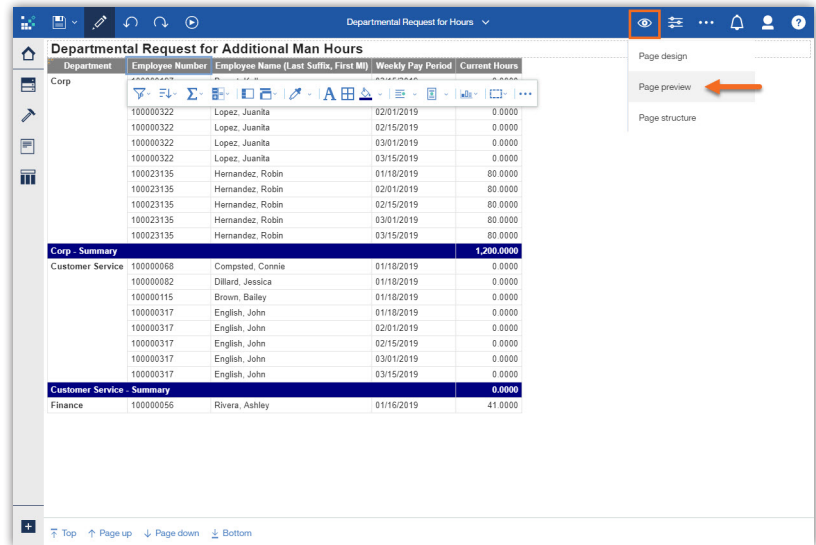
7

Customize your layout ensuring all meaningful business data is highlighted
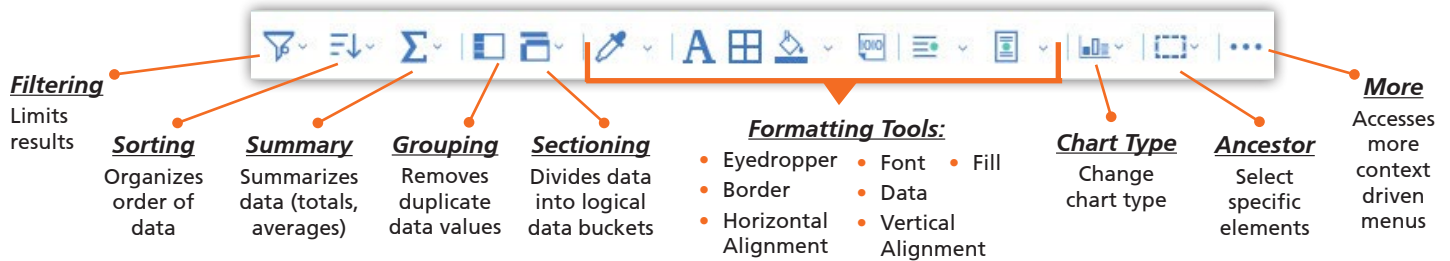

8

View report in page preview to show current layout and identify any changes you may need to make before saving

Formatting Tools

There are many options when customizing a report. The next few pages list the most common tools, a short description of each, their most common editing actions, and instructions for each.

● On-Demand Toolbar: A context driven menu that displays elements based on the part of the report you click on.

Filtering
Limits results

Sorting
Organizes order of data

Summary
Summarizes data (totals, averages)

Grouping
Removes duplicate data values

Sectioning
Divides data into logical data buckets

Formatting Tools:
- Eyedropper
- Border
- Horizontal Alignment
- Font
- Data
- Vertical Alignment
- Fill

Chart Type
Change chart type

Ancestor
Select specific elements

More
Accesses more context driven menus

● Editing Menu: Menu activated during the editing process giving you access to data sources, pages, and report objects. You can use this menu to add report objects.

Data:
Allows you to view the package (data source) used to write the report

Toolbox:
Contains a variety of objects for creating reports

Pages:
Shows you the report and prompt pages in the report

Queries:
Lists the queries and joins contained in the report

● **Columns:** Data in list columns can be rearranged, added, edited, and deleted. Only delete if you want data out of the report's data items AND the report. Instead, use scissors to cut the column from your report.

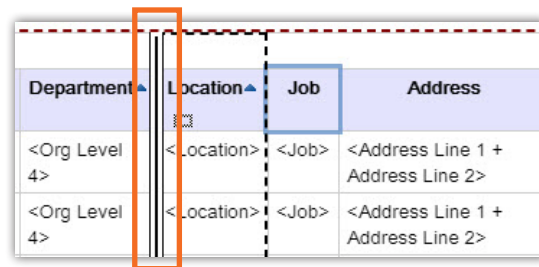| *Moving Columns:*	*Adding Columns:*	*Editing Column Headers:*	*Deleting Columns:*
1. Click on column header 2. Drag and drop in new location	1. Columns are created when data items are dragged onto the report 2. See Adding Objects below	1. Click on column header 2. Click on More (...) button on toolbar 3. Choose Edit Data Label 4. Type new label	1. Click on column header 2. Click on More (...) button on toolbar 3. Choose Delete

Columns:

- Columns are created when adding data items to a report
- Added data items appear on the right side of an existing column by default
- To add data items to a specific location, drag the item until you see the flashing black bar and then drop it

● **Adding Objects:** Reports are built by adding objects and manipulating them to create sophisticated layouts. Objects are also containers for holding other report objects such as lists, tables, images, text, or blocks.

Add Blocks:

Blocks are often used to lay out horizontal bands of information. Add a block to a report to hold text or other information.

1. Click on toolbox menu icon
2. Expand either the Pinned or Layout category to find Block
3. To add to an existing container (block): highlight object & double-click on block item from menu
4. To add to a specific location: click block item, drag it, and drop it

Add Data Items:

1. Click on data menu icon
2. Choose the package where the item exists
3. Two ways to add: double-click on data item OR right-click and choose insert

   NOTE: Added data items will always appear on right side of list by default. To add to the left of a column, highlight the existing column before inserting the new data item

Add Text Items:

1. Click on toolbox menu icon
2. Expand either the Pinned or Textual category to find text
3. To add to a specific block: highlight block & double-click on text item in toolbar menu
4. To add to list or table: click that location, click and drag text item from toolbar menu, and drop it
5. When text Dialog box appears, type in text

On-Demand Toolbar

• Sorting

Ability to organize and display the report data in ascending or descending alphabetical or numerical order

How to sort:
1. Click on data to sort
2. From toolbar, click on sort icon
3. Choose type of sort

For advanced sorting (multiple columns of data):
1. Click on Edit Layout Sorting
2. Change the grouping or sorting order by dragging the data item or clicking the up/down arrows

Notes:
- Groups take precedence over sorting. If grouping is turned off, sorting is turned off too.
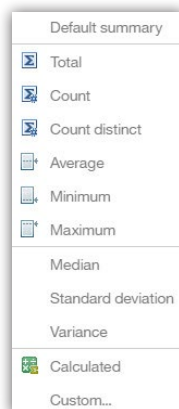- The default behavior of reports is to sort by first column in ascending order
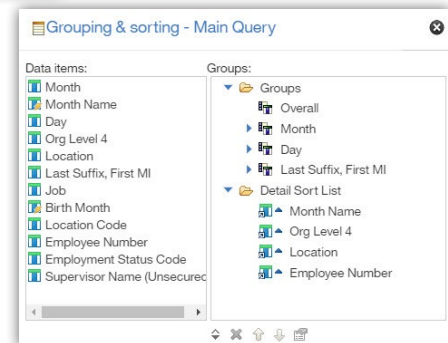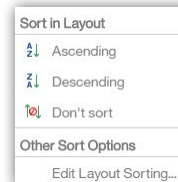
• Summarizing

Ability to roll up a set of data items into a single value that has significant meaning or measurement such as totals, averages, and so on
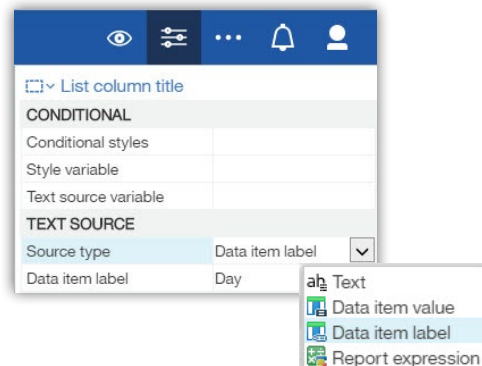
How to add a simple summary:
1. Click on column to add summary
2. From toolbar, click on summary icon
3. Click a summary type
4. Choose type of sort

How to change the summary label:
1. Click the label (column heading)
2. Click the Show Properties Icon
3. Under Text Source, choose the source type
4. Pick the source type for the label

Notes:
- Summaries for **Lists** - Data items are totaled in the headers and footers AND only summarize the data that is visible on that page of the report

On-Demand Toolbar

● **Grouping**

Ability to remove duplicate values to return a unique list or report

How to group:

1. Click on column title or one of column cells to group
2. From toolbar, click on group/ungroup icon
3. Grouping will happen automatically; there is no menu
4. If it doesn't group correctly, click the Undo arrow

Notes:

- Only lists can group data items
- Groups take precedence over sorting. If grouping is turned off, sorting is turned off too.
- If data didn't group in order desired, check the order of the groups on the menu under Edit Layout Sorting.

For advanced grouping (multiple columns):

1. Click on sort menu drop-down
2. Click on Edit Layout Sorting
3. Change the grouping or sorting order by dragging the data item or clicking the up/down arrows
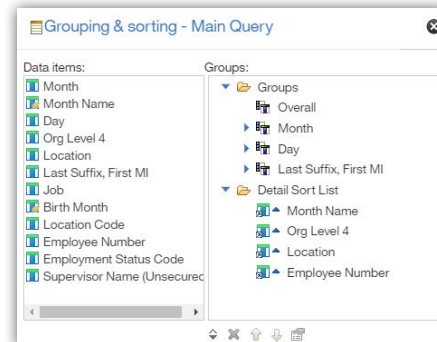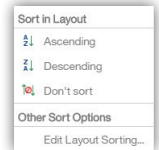
● **Sectioning**

Ability to pull data out of report columns and create sections with the data item as the headings

How to divide data into sections:

1. Click on column to make a section
2. From toolbar, click section/unsection icon
   » In lists, sections are created without using a master detail relationship
3. Click a summary type
4. Choose type of sort

How to set a page break:

1. Click the column
2. Click the section/unsection drop-drown
3. Click Set page break
4. Warning message pops up:
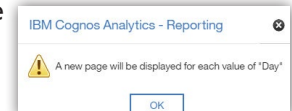
How to add or remove section headers and footers:

1. From toolbar, click on the more (...) icon
2. Click on Headers and Footers
3. Click on List Headers & Footers
4. On the List Headers & Footers menu, select or clear the appropriate check boxes