**Basic Ad Hoc Report Training**

1. What is Ad Hoc reporting and why use it
   1. When you need the contents of more than one portlet combined
   2. When you need to see details about more than one record
2. What are the limitations of the ad hoc report tool
   1. Tabular layout with single group and subtotal
   2. May have a summary and a single chart or graph
   3. Limited formatting of columns
   4. No date arithmetic and only simple calculations
3. Report List page navigation
   1. Design a New Report
   2. Design a New Dashboard
   3. Category Folders
   4. Saved Reports
      1. Delete
      2. Design icon
      3. Run the report
4. Data Source (Views and Tables)
   1. What is a view? How is a view different from a list portlet
      1. Example: record list portlet and v\_record or v\_osm\_building\_record
   2. What is a template? Templates store custom field information
   3. What is distinct? Removes duplicate rows
5. First a quick tour of the Design area
   1. Tabs
      1. Fields – allows user to identify and format field items to include in the detail section of the report. Also to define grouping and sorting options
      2. Summary – allows user to identify and format field items to include in the summary section of the report. Also define sorting options
      3. Chart – allows user to set up a chart based on the data in the details section of the report.
      4. Gauge – allows user to set up a gauge based on the data in the details section of the report
      5. Misc – set up report title, description, header and footer and page header.
      6. Style – set up the way the page will look
      7. Filters – set up fields that will be used to filter the data
      8. Preview – allows the user to see the report
   2. Menu bar
      1. Report List – returns user to Report List page
      2. New – returns user to Data Source page (If your work is not saved it will be lost)
      3. Save – allows user to save report into a category
      4. Save as – allow user to save report into a new name and category
      5. Print – produces report results as a PDF
      6. HTML – produces report as HTML printable file
      7. SQL- allow user to view the SQL that is produced during design process
      8. Excel-a – produces a raw excel file that can be converted to comma delimited file
      9. Excel – produces excel file that includes formatting
      10. Word – produces a word file with the contents of the report in a table
      11. Results – the number of rows that will displayed when using preview
      12. DataSource - returns you to the Data Source page
   3. Records – the number of rows that will be returned from the query
6. Create a report with one view.
   1. Report description – create a list of records that have a particular application status. For each record in the list show the record number, site address, work description, category of construction, type of work, date permit issued, date of record status, balance due
   2. Select V\_OSM\_BUILDING\_RECORD
   3. Select fields
      1. RECORD\_ID
      2. ADDR\_FULL\_LINE#
      3. DESCRIPTION
      4. CATEGORY\_OF\_CONSTRUCTION
      5. TYPE\_OF\_WORK
      6. DATE\_FIRST\_ISSUED
      7. DATE\_STATUS
      8. TOTAL\_INVOICED
      9. RECORD\_STATUS
   4. Set the results count and return counts
      1. Results = ‘All’
      2. Records = 1000
   5. Order and group report contents
      1. RECORD\_STATUS (Sort VG)
      2. RECORD\_ID (Sort)
      3. DATE\_FIRST\_ISSUED
      4. DATE\_STATUS
      5. ADDR\_FULL\_LINE#
      6. CATEGORY\_OF\_CONSTRUCTION
      7. TYPE\_OF\_WORK
      8. DESCRIPTION
      9. TOTAL\_INVOICED
   6. Format fields
   7. Build filters
      1. Use these for the filters
         1. RECORD\_MODULE Equals Building
         2. RECORD\_TYPE Equals (Multiple)
         3. RECORD\_STATUS Doesn’t Equal Multiple
      2. Point out that filters options are sensitive to data type
      3. Explain and/or connections in filters
   8. Format report
      1. Use miscellaneous tab to create a title
      2. Mark include filters on filter page
      3. Use style tab to modify group formatting
   9. Save report
   10. Run the report from the report page
7. Create a report using a join.
   1. Explain joins
      1. Use records and inspections to discuss inner and left
         1. List only records that have completed inspections
         2. List records whether there are completed inspections or not
   2. Report description – create a list of records with work description and state surcharge fees that had payments, void payments or refunds for a specified period. Group by record type. Subtotal the surcharge fees paid by record type.
   3. Select views
      1. V\_RECORD
      2. V\_FEE\_PAYMENT\_HISTORY
   4. Set up the DB View Relationships
      1. V\_FEE\_PAYMENT\_HISTORY RECORD\_ID = V\_RECORD RECORD\_ID Inner (Direct)
   5. Select fields
      1. V\_FEE\_PAYMENT\_HISTORY fields
         1. ACTION
         2. AMOUNT
         3. DATE\_PAYMENT
         4. FEE\_DESCRIPTION
         5. RECORD\_ID
         6. RECORD\_TYPE
      2. V\_RECORD
         1. DESCRIPTION
   6. Order and group report contents
      1. RECORD\_TYPE Sort, VG
      2. RECORD\_ID Sort
      3. DESCRIPTION
      4. FEE\_DESCRIPTION
      5. DATE\_PAYMENT
      6. ACTION
      7. AMOUNT
   7. Add subtotals
   8. Format fields
   9. Build filters
      1. RECORD\_MODULE = ‘Building’
      2. FEE\_CODE Like B\_ST\_SRCH
      3. DATE\_PAYMENT Between(Calendar) 10/1/2019 10/31/2019
   10. Build summary
       1. Title Surcharge Collected b Surcharge Fee Description
       2. Fields
          1. FEE\_DESCRIPTION Sort Group
          2. AMOUNT Sum
          3. AMOUNT Count
       3. Add subtotals
   11. Format report
   12. Save report
8. Create a report using a template
   1. Explain templates (including navigation)
   2. Report description – create a list of records with address, parcel, description, category of construction, type of work, job value, floodplain, and wetlands information. Filter the list by permits that were issued after Dec 31, 2018 and record type. Group by record type, category of construction, type of work. Count the number of records and subtotal the valuation for each group.
   3. Select the views and templates
      1. V\_OSM\_BUILDING\_RECORD
      2. V\_PARCEL
      3. PARCEL\_TEMPLATE
   4. Set up the DB View Relationships
      1. V\_PARCEL RECORD\_ID = V\_OSM\_BUILDING\_RECORD RECORD\_ID
   5. Select fields
      1. V\_OSM\_BUILDING\_RECORD
         1. ADDR\_FULL\_LINE#
         2. CATEGORY\_OF\_CONSTRUCTION
         3. JOB\_VALUE
         4. RECORD\_ID
         5. RECORD\_ID
         6. RECORD\_TYPE
         7. TYPE\_OF\_WORK
      2. V\_PARCEL
         1. PARCEL\_NBR
      3. PARCEL\_TEMPLATE
         1. FLOODPLAIN
         2. WETLANDS
   6. Order and group report contents
      1. TYPE\_OF\_WORK Sort VG
      2. CATEGORY\_OF\_CONSTRUCTION Sort VG
      3. RECORD\_TYPE Sort VG
      4. RECORD\_ID Sort
      5. RECORD\_ID Count
      6. ADDR\_FULL\_LINE#
      7. WETLANDS
      8. FLOODPLAIN
      9. JOB\_VALUE Sum
   7. Add Subtotals
   8. Format fields
   9. Build filters
      1. RECORD\_TYPE Equals (Multiple)
      2. DATE\_FIRST\_ISSUED Between(Calendar)
   10. Build summary
       1. TYPE\_OF\_WORK Sort Group
       2. CATEGORY\_OF\_CONSTRUCTION Sort Group
       3. DATE\_FIRST\_ISSUED Group(Year & Quarter)
       4. JOB\_VALUE Sum
   11. Format report
   12. Save report