



Accela Automation

Accela Automation® provides multiple departments within your agency a solution to automate workflow, forms management, activity tracking, cashiering, and other important daily tasks. A centralized database allows you to share information across departments

Guidelines for Choosing Reports for Ad hoc Report Writer

ACCELA AUTOMATION - KNOWLEDGE BASE

Two wiki's in this section help agencies and implementation teams determine what reports and documents they can create in **Accela Ad hoc Reporting**. The wiki below describes reports that can be created using the basic **Ad hoc Report Writer**, available in Accela Automation 7.2 FP2. **Guidelines for Choosing Reports for Form Designer** describes the additional kinds of reports that can be created with the **Form Designer** add-on, available in Accela Automation 7.3.

Reports that are suitable for **the Ad Hoc Report Writer** (excluding the **Form Designer** add-on) have these characteristics:

Report Characteristics

Layout

Data

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Usage Characteristics

Reports that Cannot be Created with Ad hoc Report Writer

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Report Characteristics

Layout

1. Tabular format
 - May be simple, grouped, or cross-tab.
 - May show chart or gauge.
 - May provide drill-downs.
2. Layout has a basic, generic format.
3. Layout uses typical report layout elements, e.g., report title and subtitle, parameters used, logo, column headings, group headings, subtotals/totals (without labels), page #, print date & time, etc.
4. Detailed or precise control over fonts, format, and positioning of layout elements is not required.
5. Layout doesn't have special formatting requirements, such as:
 - Specific fonts, font styles or font sizes.
 - Ad hoc Report Writer uses a sans-serif font (e.g. Arial).

- Ad hoc Report Writer sets font sizes (typically between 8pt - 10pt).
 - Borders or horizontal rules.
 - Static text other than within Report Title, Report Subtitle, Report Header, or Page Footer.
 - Alternate logo (other than global report header logo).
 - Hardcoded page breaks, other than between groups in PDF.
6. Report doesn't contain multiple reports / sections. Report doesn't contain more than one of each of these items:
- Detail table
 - Summary table
 - Chart
 - Gauge
7. Desired output file format is PDF, Excel, CSV, Word, or XML.

Data

1. Report shows Record and/or transaction details in tabular format.
 - Data may be pulled from multiple database views (tables).
 - Rows may be ungrouped, grouped, or cross-tab.
 - Subtotals and/or totals may be shown.
2. Report shows data from commonly used Accela Automation (AA) portlets in the Land Management or Licensing module. ^{Note 8}
3. Data values are pulled directly from AA standard fields or custom fields like ASI, ASIT ^{Note 2} and APO Template. Report data values are not derived from AA fields using custom rules. ^{Note 1}
4. Data is not pulled from multiple Agencies in the same report output.
5. If field values are aggregated/summarized, simple aggregation functions like Count, Sum, Average, Minimum, Maximum, etc., are used. ^{Note 3}
6. If data is grouped by date, it is grouped by common date elements like Date, Month, Year & Month, Day of Week, etc. ^{Note 4}
7. If calculated numerical data is shown, it has simple calculation using basic add, subtract, multiply, and divide operators. ^{Note 5}
8. No special manipulation of character fields is needed beyond basic concatenation of field values, without punctuation. ^{Note 6}
9. Report has no more than one of each of the following items. All items pull data from the same data views and use the same parameters and filters:
 - Detail table
 - Summary table
 - Chart
 - Gauge
10. Report doesn't attempt to construct a snapshot of data as it stood at a previous date in time.

Parameters & Filters

1. Parameters and filters are applied directly against Accela Automation (AA) fields. Examples:

- DATE_OPENED is between 1/1/2013 and 1/31/2013
 - RECORD_TYPE is like %License
 - INSPECTOR_LAST_NAME equals Jones
2. Parameters and/or filters are not applied against values that must be calculated or summarized from AA field values ^{Note 7}, or against values that are derived from AA field values using rules.
- Example: It is not possible to add criteria to pull only Staff who have more than 20 applications currently assigned for their review, as the applications count must be summarized from an AA field.

Usage Characteristics

A tabular report should be created in **Accela Ad hoc Reporting** if the following objectives are desired:

1. Non-technical staff can quickly create and deploy the report
 - Staff can begin writing reports with minimal training.
 - Knowledge of AA database schema not required.
 - Technical support from IT staff not required.
2. Users can easily copy and modify the report to meet their own needs, for example,
 - Add / remove fields
 - Change filters and parameters
3. Users can open a Record ID in Accela Automation directly from a hyperlink in the report
 - By default, all Record ID's in reports are hyperlinks ("deep links") that open the Record in Accela Automation. When users click on a Record ID in an Ad hoc Report, they can view or edit the Record in Accela Automation.

Reports That Cannot be Created with Ad hoc Report Writer

The basic **Ad hoc Report Writer** cannot be used for the report types below.

1. Letter, permit, notice, form, license, certificate, document, agenda, mailing label. ^{Note 9}
2. Summary, management, analytical, metrics, or performance reports that have one or more of the following: ^{Note 10}
 - Summary values that are derived from rules, or from aggregation functions other than simple Count, Count Distinct, Sum, Average, Minimum, Maximum.
 - Complex calculations or rules.
 - Multiple sets of criteria, or multiple line items each using different rules/criteria.
 - Parameter or filters against calculated, summarized, or derived values.
 - Multiple embedded reports or charts.
 - Process very large volumes of data.
3. Reports that require a very precise layout format or a complex layout. ^{Note 9, 10}
4. Reports that require complex data models, e.g., complex parameters and filters, complex rules.

Notes

1. Each data value to be shown in the report should come directly from a field value in Accela Automation. If data to be shown in the report doesn't come directly from an AA field value, but is derived from one or more AA fields using rules, this derived value must be added to a custom view. Custom views are advised only for derived values that are used in multiple reports. Derived values should not be used in parameters or filters.
 2. Using data from ASIT (App Specific Info Tables) is possible in Accela Automation 7.3 and later.
 3. If a field value must be summarized using an aggregation other than basic Count, Count Distinct, Sum, Average, Minimum, or Maximum, this summary value must be added to a custom view. Custom views are advised only for summary values that are used in multiple reports. Such summary values cannot be used in parameters or filters.
 4. If data must be grouped by a date element other than Date, Day of Month, Day of Week, Week, Month, Year, Year & Month, or Year & Quarter, this custom date element must be added to a custom view. Custom views are advised only for date elements that are used in multiple reports. Custom date elements should not be used in parameters or filters.
 5. If a data value must be derived from complex calculations, the calculated field must be added to a custom view. Custom views are advised only for calculated fields that are used in multiple reports. Such calculated fields should not be used in parameters or filters.
 6. If character fields must be edited before display in the report (e.g., add punctuation, change case), the edited field must be added to a custom view. Custom views are advised only for edited fields used in multiple reports. Such edited fields should not be used in parameters or filters.
 7. Parameters or filters that retrieve the age of a Date field may be used. For example, to find Records that were opened more than 30 days ago, a filter like this is used: DATE_OPENED is Greater Than 30 Days Old
 8. The base views that come with Accela Ad hoc Reporting pull data from commonly used AA portlets and fields in the Land Management and Licensing modules (excluding the Examinations portlet). ASI, ASIT and Custom Attribute data are pulled from "Templates" in Ad hoc Reporting (ASI and Custom Attributes in AA 7.2 FP2 Hotfix 7; ASIT in AA 7.3). If a report needs to show data that isn't found in the base views or Templates, a custom view may be created. Custom views are advised only for data that is used in multiple reports.
 9. The following types of reports may be created using the **Form Designer**: Letter, permit, notice, form, license, certificate, document. The **Form Designer** makes possible a variety of layouts and formatting options through its HTML-based editor. See [Guidelines for Choosing Reports for Form Designer](#) for more details.
 10. Analytical, summary, management, or performance reports are best created using Crystal Reports or SQL Server Reporting Services (SSRS), as well as agendas and mailing labels. These reporting platforms provide advanced features for complex rules and aggregation, better control over query performance, and advanced formatting options.
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