

Create a Report

Before creating a new report, ensure pop-up blockers are turned off in your browser.

1. To create a new report, click Reports in the navigation bar, then click Add to display the Report Wizard.
2. Select a report focus, then report type. There are different types of reports available for each focus area. Listing reports are primarily used to retrieve information to print or download. Custom Form Query reports are primarily used to pull information into a form or plan-event editor.

Report Wizard

General

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Report Type Data Types Scope Fields Filters Sorting Metrics Finish

What would you like your report to Focus on? Events

What type of Report would you like?

- Audit/History
- Custom Form Query
- Custom Form Relationship Query
- Custom Form Review Query
- Custom Form Unassigned Pending Review
- Custom Form Unassigned Review Schedule
- Listing
- Min-by-Min/Gap Analysis

Audit Reports show the details of changes made to items in the system.

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3. Click Forward to move to the Data Types step.
4. Select the data type(s) you wish to include in the report. Multiple data types will appear in their own sections in the report.

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Report Type **Data Types** Scope Fields Filters Sorting Metrics Finish

What Types of Data would you like to include in the report?

- Toggle All On/Off
- Folder
- News
- Contact
- Document
- Plan
- Resource
- Message
- Task
- Decision
- Broadcast
- Event Status Change
- Mini Plan
- All Action Steps
- Review
- Review Schedule
- Form
- Role

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5. Click Forward to move to the Scope step.
6. Make a selection in the Current Relative Location section to either include or exclude the current organization and all its sub-folders.
7. In the Include Options pane, navigate to the items you wish to include or exclude from the report, then click Include or Exclude.

Note: Excluding a large amount of data can affect the report's performance. As such, depending on the report, it may be better to select the orgs you wish to include, rather than exclude items on large reports.

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Report Type Data Types **Scope** Fields Filters Sorting Metrics Finish

Current Relative Location: 🏠 New Org

Do you want to include the relative location's sub organizations, plans and events?
 Do you want to exclude the relative location from this report?

Include Options

- 🏠 8.0 IE Department
- 🏠 8.0 IE Location
- 🏠 8.0 Location
- 🏠 8.0 Release Department
- 🏠 8.0 Release Location
- 🏠 Backups
- 🏠 Business Group
- 🏠 Corp
- 🏠 DD
- 🏠 Enterprise Data
- 🏠 Enterprise DR Exercise
- 🏠 KW
- 🏠 New Org
 - 📁 Events
 - 📁 Messages
 - 📁 News
 - 📁 Plans
 - 📁 Resources
- 🏠 NYDOH
- 🏠 SMS Testing
- 🏠 WF Sample
- 🏠 Ztesters

Browse Filter - Results

 Filter Reset

Included Selections

Organization

- 🏠 New Org Include Children -

Event

- 📁 Events Include Sub Folders -

Excluded Selections

Message

- 📁 Messages Exclude Sub Folders -

Resource

- 📁 Resources Exclude Sub Folders -

8. Click Forward to move to the Fields step.
9. Select at least one field for each data type to include in the report. The fields that appear in this step depend on the current user's roles and permissions. Note that fields that are not added to the report/query can still be used to filter, sort, and group the results.

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Report Type Data Types Scope **Fields** Filters Sorting Metrics Finish

News Toggle All On/Off

General Toggle All On/Off

Customer Id Path Title

Properties Toggle All On/Off

Added By Added Date Owner
 Owner Type Updated By Updated Date

Custom Fields Toggle All On/Off

Plan Toggle All On/Off

General Toggle All On/Off

Customer Id Description Include GIS Selection
 Interruption Level Last Review Date Last Reviewer
 Next Review Date Organization Path
 Severity Level Title

Properties Toggle All On/Off

Added By Added Date Owner
 Owner Type Updated By Updated Date

Custom Fields Toggle All On/Off



- Click Forward to move to the Filters step to add filters to the data types. If this button is grayed out, ensure a field has been selected for each data type included in the report.
- Select All from the Apply where conditions apply dropdown menu to ensure the generated data meets all the conditions in the filter. Select Any to ensure the generated data meets at least one condition.

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Report Type Data Types Scope Fields **Filters** Sorting Metrics Finish



Suppress empty report sections?

News

  Apply **any** where conditions apply



Column	Operator	Value
Owner Type	Equals To	manager

Plan

  Apply **any** where conditions apply

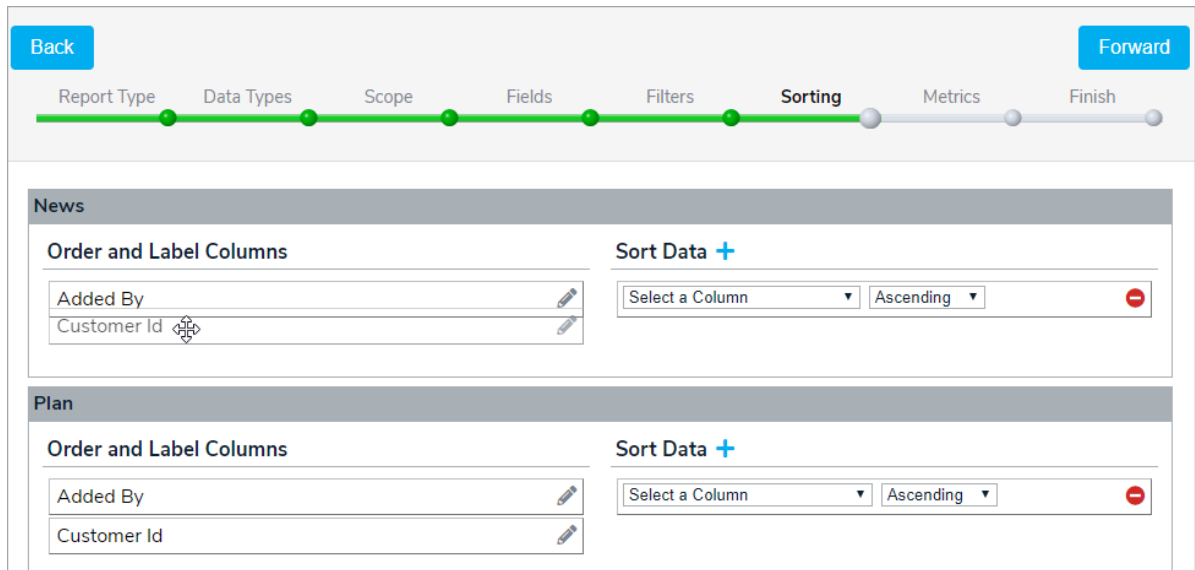
Column	Operator	Value
Select a Column	Select an Operation	




- Select a column, operator, and value of the condition.

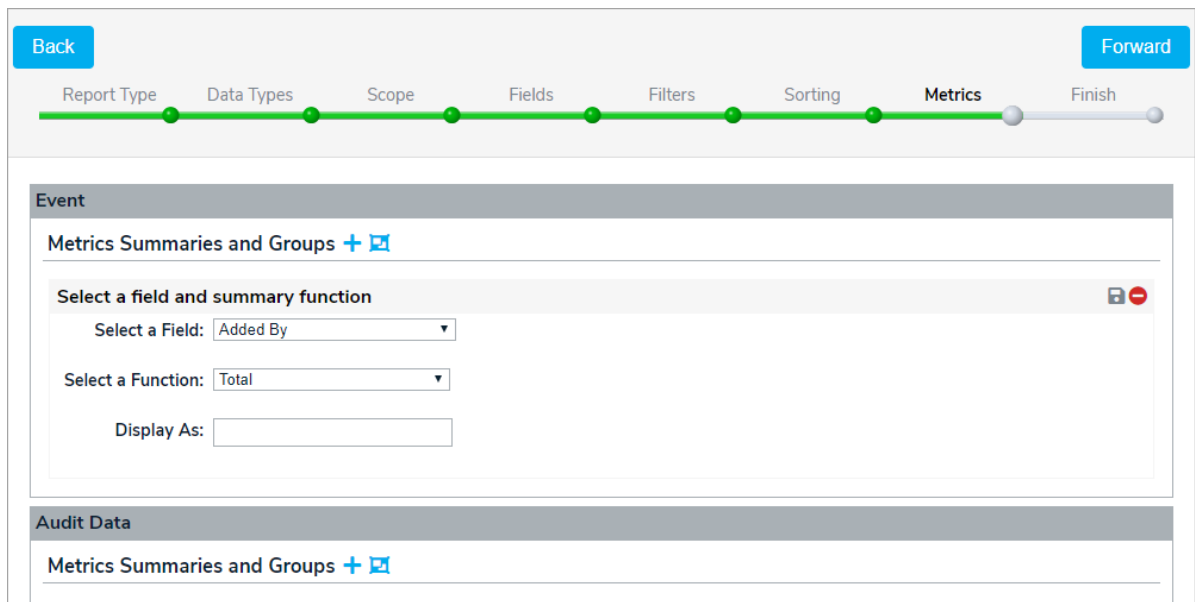
- Click the  icon to add a new filter for the data type. Click the  icon to add a new filter group.

- Click Forward to move to the Sorting step.

15. Select one or more fields associated with a data type to sort by that field.
16. Click and drag a field to configure the fields' order on the report. To change the label of the field, click the pencil icon.



17. In the Sort Data section, select Ascending or Descending to choose how the fields are sorted. Click the  icon to add another sorting condition.
18. Click Forward to move to the Metrics step.
19. Click the  or  icons to create summaries for the data types or create groups within each data type. For example, you could group the events by Event Date and calculate the Average Due By Minutes for each action step in those events.



20. Click Forward to move to the Finish step.
21. Enter a name for the report, select a new folder (if needed), and enter any descriptions. Click Add & Launch to save your report and launch it.

The launched report will appear in a separate window in which you can select the output type: HTML, CSV, TXT or XML. You can copy the data into a document or spreadsheet depending upon your requirements.

When displaying a report, it is given a URL similar to this one: ***http://192.168.1.110:7092/Reports/DisplayResults.aspx?ID=135824&TYPE=HTML***

To format the report for a printer, copy the URL into another browser window and change it to ***http://192.168.1.110:7092/Reports/ShowReport.aspx?ID=135824&TYPE=HTML***