Report Development Participant Guide

# U.S. Department of Transportation Federal Highway Administration

## **Report Development Participant Guide**



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### 2. Introduction to Using the Participant Guide

The Participant Guide helps you get started with the process of creating ad-hoc reports and quickly navigate through the various key processes of report development.

The options selected for use in this guide are for instructional purposes to showcase the different scenarios for designing a report. Field selections, other than the ones used in this guide, could possibly lead to a varied workflow and may not be covered in this guide. For additional information on the application, refer to the User Guide or Masterworks Online Help available with the application.

**Note:** You may notice screenshots containing information added throughout the document, even in places where a new empty screen would typically be displayed. This practice eliminates the need for multiple images, allowing a single screenshot to convey the essential details required to proceed with the work effectively.

### **3. Ad-hoc Reports**

In Masterworks, the **Ad-hoc Reports** feature enables you to create custom reports quickly. You can easily access your databases and transform raw data into useful and readily understood information.

You can use either of the following ways to create a custom report:

• <u>3.1. Create a report using the New Instant Report option</u> – You can create quick and simple reports in tabular format.

• <u>3.2. Create a report using the New Report option</u> – You can design ad-hoc reports with one or more data sources and various graphical elements, such as charts, gauges, pivots, and so on.

Note: Data source refers to tables or views in the application database.

#### **Ad-hoc Reports Permission Matrix**

This section provides information on the roles and corresponding permissions for the respective forms.

#### Table 1: Ad-Hoc Reports

Role	Create	Edit	View	Delete
Administrator	Yes	Yes	Yes	Yes
Pay Item Team				
Project Viewer				
Design Component				
Lead				
Designer				
Lead Designer				
Design QA/QC				
Highway Design				
Manager				
Project Manager				
A/E Designer				
A/E Lead Designer				
A/E Manager				
Acquisitions				
Construction				
Component Lead				
Construction Admin				
Staff				
Construction				
Engineer				
Highway				
Construction				
Manager/QA QC				

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Role	Create	Edit	View	Delete
Construction				
Operations				
Engineer				
Inspector				
Assistant Project				
Engineer				
Project Engineer				
A&E				

### 3.1. Creating Instant Ad-Hoc Reports

#### Prerequisites

The role of the logged-in user must be one of the following:

- Administrator
- Pay Item Team
- Project Viewer
- Design Component Lead
- Designer
- Lead Designer
- Design QA/QC
- Highway Design Manager
- Project Manager
- A/E Designer
- A/E Lead Designer
- A/E Manager
- Acquisitions
- Construction Component Lead
- Construction Admin Staff
- Construction Engineer
- Highway Construction Manager/QA QC
- Construction Operations Engineer
- Inspector
- Assistant Project Engineer
- Project Engineer
- Regional Engineer
- Assistant Project Engineer A&E
- Project Engineer A&E

For more information on role-specific permissions, refer to Ad-Hoc Reports Permission Matrix.

#### Overview

The **New Instant Report** feature enables you to create simple reports using a single data source. You can preview the report, filter the report information, and perform basic sum operations on numeric fields.

This section describes the steps to create an instant report.

#### Steps

1. In the module menu, click **Home**.

The Enterprise Dashboard page is displayed.

	HOME				ENTERPRISE DASHBOARD								
Q,	Type to Search	×	¥	^	Select Dashboard:	Project Dashboard		Mode: View	~	Dew	_Ø Edit	🕅 Delete	🐴 Set As Default
諭	Notifications (16)				Report Viewer								
<u>∎</u>	Enterprise Search				<b>∢ ∢</b> <u>⊥</u> cf ⊥		0▼ 叠						
	<ul> <li>Document Search</li> </ul>					PROJ	ECTS BY % COMP	LETE					
6	E Fund Management												
	<ul> <li>Report Gallery</li> </ul>												
	<ul> <li>Ad-hoc Reports</li> </ul>												
	Ad-Hoc Unit Price Set	earch F	≀esult										
	Ad-Hoc Unit Price Set	earch											
	Recent Projects			<									
				- 1									
						PROJ	ECTS BY % COMP	LETE					
>													

Figure 1: Enterprise Dashboard

2. In the navigation pane, click **Ad-hoc Reports**. The **REPORTS LIST** page is displayed.

НОМЕ			EPORTS LIST			
Q,	Type to Search 🗙 🗙 🔨	Ð	New - 💬 More -			Т
諭	Notifications (3)		Report Name	Report Category	Created By	Last Modified Date
擂	<ul> <li>Enterprise Search</li> </ul>		T	T		T
nnA	<ul> <li>Document Search</li> </ul>		Awardamts Incentives		Kim_ConstCompLead	01/18/2024 11:34:20 AM
	Fund Management		Awarded Projects - KP Test		Kim_ConstCompLead	06/24/2024 11:59:26 PM
142	<ul> <li>Report Gallery</li> </ul>		CM Issues Report for ACAD 103		Kim_ConstCompLead	12/19/2023 2:12:36 PM
	= Ad-hoc Reports		CM Report for ACAD 103		Kim_ConstCompLead	12/19/2023 1:43:03 PM
	<ul> <li>Ad-Hoc Unit Price Search Result</li> </ul>		CM Summary Report		Kim_ConstCompLead	11/30/2023 1:11:22 PM
	Ad-Hoc Unit Price Search		DB AQC Instant Report		Kim_Admin	07/13/2023 3:55:12 PM
	Recent Projects		DB Aqc Report - better		Kim_Admin	07/07/2023 10:08:48 AM
			EFL Status Spreadsheet		Kim_ConstCompLead	09/29/2023 2:54:54 PM
			KP Project Info Test		Kim_ConstCompLead	03/18/2024 3:20:41 PM
			KP Sub Search		Kim_ConstCompLead	06/20/2024 10:53:16 AM
			New Projects with EE		Kim_ConstCompLead	09/15/2023 3:28:59 PM
			New Projects with EE K		Kim_ConstAdmStaff	09/15/2023 3:43:28 PM
			Pay Note History - KP Test		Kim_ConstCompLead	05/07/2024 12:05:28 PM
			Progress Payment Report		Kim_ConstCompLead	09/18/2023 2:42:53 PM
>		ы				Page 1 of 2

Figure 2: Reports List Page

3. Click New, and then click New Instant Report.



Figure 3:New Instant Report Option

The **INSTANT REPORT** page is displayed.

INSTANT REPORT	
Q ×	ΦΣ 🖍 🔍
Collapse all Uncheck all	
	No Fields Selected
⊕ Engineer's Estimate	
⊕ Fund Management	
Progress Tracking	

Figure 4: Instant Report Page

The page comprises two panes.

4. In the left pane, click  $\oplus$  to expand the appropriate data source categories.

The list of data sources in the categories is displayed. The available data sources are tables and views in the application database.

INSTANT REPORT	
🕞 Back 💥 Design 👁 View	
Collapse all Uncheck all	ΦΣ 🖍 🔍
$\oplus$ Acquisitions	No Fields Selected
⊕ Contract Management	
⊖ Contracts	
Contract Details	
Contract Item	
⊕ Engineer's Estimate	
⊕ Fund Management	,

Figure 5: List of Data Source

5. Select the appropriate data source.

The fields in the selected data source are displayed.

⊖ Contracts
Contract Details
Text
CME Comment
COE Comment
CSTATUS Comment
Calendar
Contract #
Contract Name
Contract Time Type
Created By
Description
Disputed?
Disputes & FOIA Status

Figure 6: Selected Data Source

6. Select the appropriate fields to add columns in the report. The preview of the report is displayed in the right pane.

۹ ×	ΦΣ 🖍 🔍
Collapse all Uncheck all	
① Acquisitions	
① Contract Management	
⊖ Contracts	_
✓ Contract Details	CME Comment COE Comment
Text	winter shutdown
CME Comment	Unilateral CM #2 issued
COE Comment	September 21, 2022, extended the POP to June 30, 2023
CSTATUS Comment	Rama_ProjectEngineer Rama_ProjectEngineer
Calendar	

Figure 7: Preview of the Report

The column sequence in the report is based on the order in which the fields are selected.

Additionally, in the right pane, you can use the following functions:

Icon	Control Name	Description
	Add New Filter	<ul> <li>To filter the records in the preview, perform the following steps: <ul> <li>a. Click</li> <li>b. From the drop down list, select the filter criterion to add to the report.</li> <li>Available options are fields associated with the selected data source.</li> <li>Based on the selected field, a box is displayed below the filter.</li> <li>c. In the box under the filter header, enter or select the filter criterion.</li> <li>The values of the selected column are displayed as per the filter criterion.</li> </ul> </li> </ul>
Φ	Update Preview	Click for the filter to take effect in the preview, if any.
Σ	Add Subtotal	Click to add a subtotal at the end of each number column.
	Design Report	Click to enhance a report and include graphical elements to it. For information on designing a report, refer to <u>Section 3.2. Designing Ad-hoc Reports.</u>
Q	View Report	Click to view the report in the <b>REPORT VIEWER</b> page.

**Note**: To save or export your instant report, you must select either **View** or **Design** to navigate to the **REPORT VIEWER** or **REPORT DESIGNER** page, respectively.

- 7. Alternatively, to define field properties for the selected field, perform the following steps:
  - a. Hover your mouse over the selected field, and then click 🔯.

Θ	Acquisitions		
	Acquisitions Query		
~	Advertisement		
	Text	Allow Paper Bids	
		False	
	Allow Paper Bids	true True	
	Bid Items: Alternate Number		

Figure 8: Settings Option

b. Provide the appropriate information in the fields, as described in the following table:

Feature	Description
Description	By default, the name of the field is displayed. Optionally, enter
	a description for the field.
Format	Select the appropriate format for the selected field.
	Available formats are based on the data type.
Subtotal function	Select the appropriate function for calculation, such as Sum or
	Count.
	Available options in the list may vary based on the selected
	field.
Total	Select the check box to ensure the total value is displayed
	based on the selected field.
Visual Group	Select the check box to group records based on the selected
	field.
Multiline Header	Select the check box to make the header of the selected
	column multiline.
Label Justification	To align the column header or column value of the selected
Value Justification	field, click $oxdot$ , and repeat the process until the appropriate
	alignment is selected.
	• 🗉 indicates left alignment.
	• 📧 indicates right alignment.
	• M indicates middle alignment.
Width	Enter the width of the selected column.

c. Click **OK**.

8. Optionally, to enhance a report and include graphical elements to it, in the toolbar, click

Design.

You are navigated to the Fields tab in the **REPORT DESIGNER** page.

INSTANT REPORT		
🕞 Back 🔀 Design 💿 View		
Q	×	¢Σ 🖍 Q
	Collapse all Uncheck all	
⊖ Acquisitions		+
<ul> <li>Acquisitions Query</li> </ul>		
Text		
✓ Competition Information		
✓ Contract Number		Competition Information 🔺 Contract Number
Contractor		6982AF20C000036
Contractor Business Type		693C7322CD00001
Data Public or Private		6982AF20C000007
		C-27/6
FLH Division		Contract1901
Funding Source		SIT Test Project 2
Dartner Agency		693C7321C000002

Figure 9: Design Option

For information on designing a report, refer to <u>Section 3.2. Designing Ad-hoc Reports</u>.

9. Click View.

IN	STANT REPORT			
⊕	Back 🔉 Design 💿 View			
e	Acquisitions		•	í
	Advertisement			- 1
	Text Bid Items: Pay Item No.	****	Allow Paper Bids	
	A+B Bidding		False	
	A+B Bidding: Modified By		True	
	A+B Bidding: Schedule Letter			
	✓ Allow Paper Bids			
	Bid Items: Alternate Number			
	Bid Items: Container Path			
	Bid Items: Description			
	Bid Items: Line Item No.			
	Bid Items: Modified By			+

Figure 10: View Option

#### The **REPORT VIEWER** page is displayed.

REPORT VIEWER	
🚡 Save 🕺 Design 🖏 SaveAs 🚖 Print 🗞 Export Options 👻 属 Email Report	
	Filters Fields
O UPDATE RESULTS	
Allow Paner Hids	
False True	

Figure 11: Report Viewer

- 10. To filter the records in the report, perform the following steps:
  - a. Click 📩 .
  - b. From the drop-down list, select the filter criterion to add to the report. Available options are fields associated with the selected data source. Based on the selected field, a box is displayed below the filter.
  - c. To define a filter, hover your mouse over the search criterion, and then click 🔯 .



Figure 12: Settings Option

A dialog box is displayed.

- d. In the Description field, enter a description for the filter.
- e. From the Filter Operator drop-down list, select the appropriate operator.
- f. Click OK.
- g. In the box under filter header, enter or select the filter criterion.
- h. The values of the selected field are displayed as per the filter criterion.
- i. Click UPDATE RESULTS.
- j. The report is updated and displayed based on the data criterion entered or selected in the box.
- k. Optionally, to delete the filter, hover your mouse over the search criterion, and then click  $\mathbb X$  .



Figure 13: Delete

- 11. To add additional fields to the report, perform the following steps:
  - a. Click the **Fields** tab.

- b. In the left box, select the appropriate fields to add to the report, and then click. The selected fields are moved to the right box.
- c. To remove a field from the report, in the right box, select the appropriate field, and then click <
- d. To rearrange the fields in the report, in the right box, select the field to move, and then click **UP** or **DOWN**.
- e. Optionally, to configure field properties, in the right box, select the appropriate field, and then click **FIELD PROPERTIES**.

The field properties dialog box is displayed.

- f. To provide the appropriate information for the respective fields, refer to **step 7b**.
- g. Click OK.
- h. Click **UPDATE RESULTS**.

The report is updated and displayed.

12. In the toolbar, click **Save**.

If you have not previously saved the report, a dialog box is displayed to enter the report name and select a category.

Alternatively, click **SaveAs**.

A dialog box is displayed to enter the report name and select a category.

13. In the **Input report name** field, enter the name of the report.

**Note**: Refrain from using special characters such as ' (apostrophe) in the report name.

14. To categorize the report, from the **Category** drop-down list, select the category for the report. You can either select from the existing categories or create a new category.

To create a new category, perform the following steps:

a. From the **Category** drop-down list, select **(Create New)**. A dialog box to enter category name is displayed.



Figure 14: Report Name Dialog Box

b. In the **New category name** field, enter the name of the category.

#### c. Click Create.

The category is created and displayed in the **Category** drop-down list.

- d. Click **OK**.
- **15.** In the navigation pane, click **Ad-hoc Reports.**

The report is available in the **REPORTS LIST** page.

### 3.2. Designing Ad-hoc Reports

#### Prerequisites

The role of the logged-in user must be one of the following:

- Administrator
- Pay Item Team
- Project Viewer
- Design Component Lead
- Designer
- Lead Designer
- Design QA/QC
- Highway Design Manager
- Project Manager
- A/E Designer
- A/E Lead Designer
- A/E Manager
- Acquisitions
- Construction Component Lead
- Construction Admin Staff
- Construction Engineer
- Highway Construction Manager/QA QC
- Construction Operations Engineer
- Inspector
- Assistant Project Engineer
- Project Engineer
- Regional Engineer
- Assistant Project Engineer A&E
- Project Engineer A&E

For more information on role-specific permissions, refer to Ad-Hoc Reports Permission Matrix.

#### Overview

The **Ad-hoc Reports** feature enables you to design and create your custom reports. You can share these customized reports with other users of the system.

Based on the requirement, you can use either of the following ways to create a report:

- The **Simple** mode enables you to design an ad-hoc report with a single data source.
- The **Advanced** mode enables you to design an ad-hoc report with multiple data sources.

The task sequence to design a custom report is:

- 1. Select the appropriate data sources.
- 2. Define the appropriate fields in the selected data view.
- 3. Specify report summary details to define calculations, grouping, and sorting.
- 4. Select various displays with charts.
- 5. Specify report style, formatting, and data filters.
- 6. Select the roles with whom you want to share the report.
- 7. View a preview of the report that you created.
- 8. Group your reports into custom categories.

Note: To prevent time out, it is recommended to regularly save the report when you create it.

#### Steps

1. In the module menu, click **Home**.

The Enterprise Dashboard page is displayed.

	HOME	ENTERPRISE DASHBOARD
Q	Type to Search 🗙 🗙 🛧	🖬 Select Dashboard: Project Dashboard 🗸 Mode: View 🗸 🖞 New 🧳 Edit 🗎 Delete 🎭 Set As Default
	Notifications (16)  Enterprise Search Document Search Tund Management	Report Viewer     ▲       Image: Imag
¢.	Report Gallery     Ad-hoc Reports     Ad-Hoc Unit Price Search Result     Ad-Hoc Unit Price Search     Recent Projects	
		PROJECTS BY % COMPLETE
1		

Figure 15: Enterprise Dashboard

- 2. Optionally, if you want to rename the report after saving it, perform the following steps:
  - a. In the **REPORTS LIST** page, select the appropriate report, and then click **View**.

REPORTS LIST			
🖸 Edit 💿 View 🔟 Delete			1.Selected X
Report Name	Report Category	Created By	Last Modified Date
7	T	T	
Awardamts Incentives		Kim ConstCompLead	01/18/2024 11:34:20 AM
Awarded Projects - KP Test		Kim_ConstCompLead	06/24/2024 11:59:26 PM
CM Issues Report for ACAD 103		Kim_ConstCompLead	12/19/2023 2:12:36 PM
CM Report for ACAD 103		Kim_ConstCompLead	12/19/2023 1:43:03 PM
CM Summary Report		Kim ConstCompLead	11/30/2023 1:11:22 PM
DB AQC Instant Report		Kim_Admin	07/13/2023 3:55:12 PM
DB Aqc Report - better		Kim_Admin	07/07/2023 10:08:48 AM
EFL Status Spreadsheet		Kim_ConstCompLead	09/29/2023 2:54:54 PM
KP Project Info Test		Kim_ConstCompLead	03/18/2024 3:20:41 PM
KP Sub Search		Kim ConstCompLead	06/20/2024 10:53:16 AM
			Page 1 of 2

Figure 16: Reports List Page

The **REPORT VIEWER** page is displayed.

REPORT VIEWER							
🗋 Save 🔉 Desi	gn 🗔 Save/	As 🚔 Print	P <sub>a</sub> Export Options	- 🛃 Email Repo	rt		
						Fil	ters Fields
Awardamts I	ncentives						
Award Date	e		+				
1/1/2019							
1/18/2024			anami				
Contract Name	Award Date	Contract #	Contract Amount	Incentive Amount	Project Name	Project Number	Federal Land
222	10/30/2023	Cont 01			KPro 2108	KPro 2108	Fed 01
222	10/30/2023	Cont 01			KPro 2407	KPro 2407	Fed Land 01
122	10/20/2022	Cont 01			KDra for Amond	KDro for Amond	

Figure 17: Report Viewer Page

b. Click SaveAs.

A dialog box is displayed with the details of the existing report.



Figure 18: Report Name Dialog Box

- c. In the Input report name field, enter the name of the report.
- d. To update the category, refer to step 14.
- 3. In the navigation pane, click **Ad-hoc Reports**.

The **REPORTS LIST** page is displayed.

	HOME	RE	PORTS LIST			
Q	Type to Search 🗙 🗙 🔨	Ð	New - 💮 More -			T
Π,	Notifications (13)		Report Name	Report Category	Created By	Last Modified Date
谕	Enterprise Search		T		T	
17	= Document Search		Awardamts Incentives		Kim_ConstCompLead	01/18/2024 11:34:20 AM
l#	Eund Management		Awarded Projects - KP Test		Kim_ConstCompLead	06/24/2024 11:59:26 PM
	<ul> <li>Report Gallery</li> </ul>		CM Issues Report for ACAD 103		Kim_ConstCompLead	12/19/2023 2:12:36 PM
٩	Ad-hoc Reports		CM Report for ACAD 103		Kim_ConstCompLead	12/19/2023 1:43:03 PM
	Ad-Hoc Unit Price Search Result		CM Summary Report		Kim ConstCompLead	11/30/2023 1:11:22 PM
	<ul> <li>Ad-Hoc Unit Price Search</li> </ul>		DB AQC Instant Report		Kim Admin	07/13/2023 3:55:12 PM
	m Recent Projects		DB Aqc Report - better		Kim Admin	07/07/2023 10:08:48 AM
			EFL Status Spreadsheet		Kim_ConstCompLead	09/29/2023 2:54:54 PM
			KP Project Info Test		Kim_ConstCompLead	03/18/2024 3:20:41 PM
			KP Sub_Search		Kim_ConstCompLead	06/20/2024 10:53:16 AM
>		14				Page 1 of 2

Figure 19: Reports List Page.

4. Click **New**, and then click **New Report**.



Figure 20: New Report Option

The **REPORT DESIGNER** page is displayed with different tabs to create and design a new report.

REPORT DESIGNER			
🕒 Back 🚡 Save 🕞 SaveAs 🦨	🔓 Print 🛛 🚱 Export Options 👻 📑 Email Rep	ort	
Data Sources Fields Summ	ary Chart Chart2 Gauge Misc	Style Filters Preview	
Z Distinct			
<b>Recent Data Sources</b>			
Acquisitions			
Acquisitions Query	Advertisement	Amendment	
Bid History Query	Bid Opening And Review		
Contract Management			
Claims	Construction Contract Status	Contract Closeout Status	
Contract Modifications		Freedom of Information Act (FOIA)	
🗆 Item Posting	Key Contacts	Pay Estimates	
Pay Estimates Tracking	Progress Payment	Request for Equitable Adjustments	
Submittal			

Figure 21: Report Designer Page

5. In the **Data Sources** tab, ensure the **Distinct** check box is selected, indicating that the distinct condition is applied to the report. It ensures that for multiple records with the same data, only one instance of the record is displayed in the report.

Optionally, clear the **Distinct** check box to view all records including duplicate records.

- 6. To select data sources using the **Simple** or **Advanced** mode, perform either of the following steps:
- To add fields to the report from a single data source using the **Simple** mode, select the appropriate data source check box.

**Note**: By default, the Data Sources tab is displayed in the Simple mode in which you can only select one data source.

The available data sources are tables and views of the application database. Alternatively, from the **Recent Data Sources** drop-down list, select the appropriate data source from the recently used data sources.

- To add fields to the report from multiple data sources using the **Advanced** mode, perform the following steps:
  - a. Click the **Advanced** button at the bottom of the page.

The **Advanced** mode is displayed.

REPORT DESIGNER	
🕞 Back 🛅 Save 🕞 SaveAs 👘 Print	🚱 Export Options 👻 🖪 Email Report
Data Sources Fields Summary	Chart Chart2 Gauge Mlsc Style Filters Preview
Distinct  Allow nulls Data Sources (Tables and Views)	
Acquisitions Query ~	2
Simple Continue to Fields	

Figure 22: Advanced Mode

Note: There must exist at least one common field in the selected data sources to associate them.

- b. To select multiple data sources for the report, perform the following steps:
  - i. From the **Data Sources (Tables and Views)** drop-down list, select the appropriate data source.
  - ii. Click 🎴.

A drop-down list is added.

iii. From the newly added drop-down list, select the appropriate data source to associate with the initially selected data source.

The common field in both the data sources are selected and displayed.



Figure 23: Report Designer

- The second drop-down list displays all the fields of the second data source selected.
- The third drop-down list, by default, displays the data source that was initially selected.
- The fourth drop-down list displays all the fields of the initial data source selected.

iv. From the second drop-down list, select the appropriate field of the second data source.

- In the fourth drop-down list, select the appropriate field of the initial data source.
   Note: Ensure the option selected in the second and the fourth drop- down lists are the same and have unique values.
- vi. Use the following buttons to add data sources and delete existing rows:
  - Click 🖾 to delete the existing row.
  - Click 🔄 to insert a field above the existing data source.
  - Click 🖻 to a field below the existing data source.
- vii. Repeat steps **5.b.ii** to **5.b.v** to add and connect multiple data sources.

viii. Select the **Allow nulls** check box to display all the records on the report including the records without values.

- 7. To select fields from the selected data sources, perform the following steps:
  - a. Click **Continue to Fields** or click the **Fields** tab.

cords					
Field	Description	Sort VG A	Function	Format	
~			~		🗸 🔀 🛤
Add Subtotals Hide Grid					

Figure 24: Fields Tab

b. Provide the appropriate information in the **Fields** tab, as described in the following table:

Feature	Description
Records	Enter the maximum number of records that must be displayed on a report page.
Field	From the drop-down list, select the appropriate fields or use the <b>Quick Add</b> button to add multiple fields at a time.

Feature	Description				
	Available options are all the fields of the selected data sources.				
Description	By default, it displays a title for the field.				
	Optionally, enter a new title for the field.				
Sort	Select the check box to sort the field in ascending order on the report.				
	Click 🖻 to configure advanced properties for the field.				
	For more information on advanced properties, refer to <u>Section</u>				
	3.3. Advanced Field Settings.				
VG	Select the check box to visually group your data based on the				
	selected field.				
	Note: The Visual Group Style option within the Style tab defines the				
	functionality of the Visual Group ( <b>VG</b> ) option.				
A	Select the check box to select the appropriate arithmetic operator for				
	the field.				
	Inis function performs basic calculations (+, -, x, %) and				
	Concatenation of text.				
	the required arithmetic function is displayed. The availability of				
	operators varies based on whether the selected field is a numeric				
	field date field and so on				
	<b>Note</b> : The arithmetic function is applied to the selected field against				
	the field above. Hence, you cannot use the arithmetic function in the				
	first row				
	Refer to the following image for the example arithmetic operation of				
	sum and its preview:				
	REPORT DE SIGNER				
	🕞 Back 📓 Seve 🕼 SeveAs 🚔 Print 🖏 Export Options 👻 😹 Emeil Report				
	Data Sources Fields Summary Chart Chart2 Gauge Misc Style Filters Preview				
	Records				
	Field     Description     Sort VS     Function     Format       Engineer's Estimate Update     Engineer's Estimate Update F     Group      Image: Complex and the second s				
	Amendment Items: Unit I       Count Distincti/Amendment II       Count Distinct       \$0.00       2       2       2       4       4       4         Amendment Items: Chan       Amendment Items: Change T       I       I       Group       III.       2       2       2       2       2       2       2       4       4       4				
	Advertisement Date       ↓         Advertisement Date       □          ✓				
	☐ Add Subtotals ☐ Hide Grid				
	Quick Add         Add Pivot         Remove All         Continue to Summary         Preview				
	Engineer's Estimate Update Required Count Distinct(Amendment Items: Unit Price (5) Amendment Items: Change Type Maximum//dvertisement Date)				
	na \$0.00 6/30/2023 Yea \$0.00 6/30/2023				
	Net         bitsub (Neter         bitsub (Neter           Yes         \$14.00 New         6/30/2023           Yes         \$22.00 Update         6/30/2023				
	Eigure 25: Arithmatic Euroction				
	ו וצעויפ 25. אוזנוווופנוג רעווכנוטוו				
Function	From the drop-down list, select the appropriate function of the				
	selected field.				
	Available options vary based on the type of data being accessed,				
	such as numeric field, date field, and so on.				

Feature	Description		
Format	From the drop-down list, select the appropriate format to display		
	the field values on the report.		
	Available options are based on the data type.		
Other Buttons	Optionally, corresponding to a row, use the following buttons to inser new fields, configure field properties, move fields, and delete existing rows:		
	<ul> <li>Click to delete the existing row.</li> </ul>		
	<ul> <li>Click I to insert a field above the existing field.</li> </ul>		
	<ul> <li>Click let to insert a field below the existing field.</li> </ul>		
	<ul> <li>Click to configure advanced properties for the row.</li> </ul>		
	For more information on advanced properties, refer to <u>Section</u>		
	<u>3.3 Advanced Field Settings.</u>		
Deservela	Drag 1 to move the field up or down the order.		
Records	Enter the number of records to be displayed in the summary on a report page.		
Add Subtotals	Select the check box to include subtotal value in the report.		
Hide Grid	The check box is applicable only for chart reports. Select the <b>Hide</b> <b>Grid</b> check box to display only the chart on the report without the field information table.		
Quick Add	Click to add multiple fields to the report.		
Add Pivot	The Pivot feature enables you to generate analytical data grids from		
	within reports. The Pivot feature adds extra pivot columns to the right		
	side of the report. This is useful for comparing data over multiple		
	categorical dimensions. For example, a pivot table can be added		
	when for every project, you want to view the monthly pay- outs		
	through the pay estimates.		
	i Click Add Pivot		
	The <b>Add pivot columns for</b> drop-down list is displayed.		
	Data Sources Fleids Summary Chart Chart2 Gauge Misc Style Filters Preview Records		
	Field     Description     Sort VG     Function     Format               Add plot columns for            Add Subtocals             Hide Grid		
	Quick Add Remove pivot Remove All Continue to Summary		
	Figure 26: Pivot Columns		
	ii. From the Add pivot columns for drop-down list, select the		
	appropriate field, and in the <b>function</b> drop-down list, select the		
	appropriate function based on which pivot must be created.		

Feature	Description
	<ul> <li>Upon selecting the field from the Add pivot columns for drop-down list, the Calculate cell values on field is displayed.</li> <li>iii. From the Calculate cell values on drop-down list, select the appropriate value to be displayed inside the pivot.</li> <li>From the function drop-down list, select the appropriate function based on which pivot must be created.</li> <li>From the format drop-down list, select the appropriate format to display the field values on the pivot.</li> <li>iv. Optionally, corresponding to a row, use the following buttons to delete existing rows, insert new fields, and configure field properties: <ul> <li>Click to insert a field below the existing field.</li> <li>Click to configure advanced properties for the row. For more information on advanced properties, refer to Section 3.3. Advanced Field Settings.</li> </ul> </li> </ul>
Add Side Total	<b>Note</b> : This field is available only if the Add Pivot feature is used.
	Select the check box to include side-total value in the report.
Remove All	Click to clear all the selections made in the <b>Fields</b> tab.
Continue to	Optionally, click to continue to the next tab in the report design
Summary	process, the <b>Summary</b> tab.
Preview	Click to preview the report in the <b>Preview</b> tab.

- 8. To include a summary of the necessary records to the report, perform the following steps:
  - a. Click the **Summary** tab.

REPORT DESIGNER	🚔 Print 🖗 Export Optio	ns 🕶 🖪 Ema	il Report		
Data Sources Fields Sum	mary Chart Chart2	Gauge	Misc Style F	ilters Preview	
Field	Description	Sort	Function	Form	nat
V Add Subtotals Add Deltas Hide Grid				▼	v 🔀 🛎 🦗 🤤
Continue to Chart					

Figure 27: Summary Tab

b. Provide the appropriate information to the properties available in the **Summary** tab, as described in the following table.

Feature	Description
Title	Enter the title of the summary.
Records	Enter the number of records to be displayed in the summary on a report page.
Field	Select fields to include in the summary.
Description	Enter the description of the selected field.
Sort	Select the check box to sort the field in ascending order in the summary of the report.
Function	From the drop-down list, select the appropriate function of the selected field. Available options vary based on whether the selected field is a numeric field, date field, and so on.
Format	From the drop-down list, select the appropriate format for display of the field values in the summary. The <b>Format</b> field is applicable for numeric functions.
Other Buttons	<ul> <li>Optionally, corresponding to a row, use the following buttons to insert new fields, configure field properties, move fields, and delete existing rows: <ul> <li>Click I to delete the existing row.</li> <li>Click I to insert a field above the existing field.</li> <li>Click I to insert a field below the existing field.</li> <li>Click I to configure advanced properties of the field. For more information on advanced properties, refer to Section 3.3. Advanced Field Settings.</li> <li>Drag I to move the field up or down the order.</li> </ul> </li> </ul>
Add Subtotals	Select the check box to display subtotals in the summary.
Add Deltas	Select the check box to display difference in values between the current row and the previous row. The difference value is displayed in a separate row.
Hide Grid	Select the check box to display only the chart in the summary without the field information table. <b>Note</b> : The <b>Hide Grid</b> check box is applicable only for chart summaries.
Continue to Chart	Optionally, click to continue to the next tab in the report design process, the <b>Chart</b> tab.
Preview	Click to preview the report in the <b>Preview</b> tab.

9. To add a Trend, Bar, Pie, or Funnel chart to the report, perform the following steps:
 Note: You can add a maximum of two charts to a report. Click Chart2 tab to add the second chart.

a. Click the **Chart** tab.

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Chart 7	Type Bar 🗸								
Title					Re	cords			
Label	Award Date	~	Function	Group(Month Name)	~	Format	•••	×	Sort $\Box$
Value	Award Date V Function Count V Format 0,000 V So			Sort 🗆					
Advar Conti	nced Properties inue to Chart2	Preview		Figure 000 Object	+ Tak				
				Figure 28: Char	t Iab				

b. Provide the appropriate information to the properties available in the **Chart** or **Chart2** tab, as described in the following table:

Feature	Description
Chart Type	From the drop-down list, select the appropriate type of chart to be
	displayed on the report.
	The properties fields to configure the chart are displayed. Available
	options are based on the option selected in the <b>Chart Type</b> drop-
	down list.
Title	Enter a title for the chart.
Records	Enter the number of records to be displayed on the chart.
Date	If the selected <b>Chart Type</b> is <b>Trend</b> , then select the time metric for
	the chart.
	The options in this field are detected automatically from the selected
	data sources.
Label	If the selected <b>Chart Type</b> is other than <b>Trend</b> , then select the
	appropriate label for the chart.
	The label of the chart is the name of the value on the chart. The label
	indicates the elements on the chart, such as the slice, bar, or time
	point.
Function	From the drop-down list, select the appropriate function for the
	selected label.
	Available options vary based on whether the selected label is a
	numeric field, date field, and so on.
Format	From the drop-down list, select the appropriate format for display of
	the values in the summary.
	Note: The Format field is applicable only for numeric functions.

Feature	Description
Sort	Select the check box to sort the field in ascending order in the report.
Sort (z-a)	Select the check box to arrange gauges in descending order.
Value	From the drop-down list, select the appropriate field value for the chart. The selected field value is the number that is displayed within each Label. The size of a pie slice, the size of a bar, or the height of a point on a line is represented by the values of this field.
Function	From the drop-down list, select the appropriate function of the selected value. Available options vary based on the whether the selected value is a numeric field, date field, and so on.
Format	From the drop-down list, select the appropriate format for display of the values in the summary.
Sort	Select the check box to sort the field in ascending order in the chart of the report.
Advanced Properties	Click to configure advanced properties for the chart.
Continue to Chart2 or	Optionally, based on the tab you are in, click the button to continue to the next tab in the report design process.
Continue to Gauge	
Preview	Click to preview the report in the <b>Preview</b> tab.

- 10. To add a panel of gauges to the report, perform the following steps:
  - a. Click the **Gauge** tab.

REPORT DE	ESIGNER								
Back	🖪 Sav	re 🖸 SaveAs 👘 Pr	int 🕞 Export Options	- 🛃 Email	l Repo	rt			
Data So	urces	Fields Summary	Chart Chart2	Gauge	/lisc	Style	Filters	Preview	
Title			Results 1 ¥						
Name		~							
Value		~	Function		$\sim$	Format			~
Sort		~	Function		~	Sort (z-a)			
Minim	um		Maximum						
Color		0%:CornflowerBlue;10	00%:AliceBlue						
Gauge	Style	● Radial ○ Radial 2	O Animated Half Circ	le OLinear	OLc	garithmic			
🗆 Shov	v value	s in currency format							
Target	report	····	~						
Conti	nue to I	Misc Preview							

Figure 29: Gauge tab

b. Provide the appropriate information to the properties available in the **Gauge** tab, as described in the following table:

Feature	Description
Title	Enter the title of the gauge.
Results	From the drop-down list, select the number of results to be displayed in the panel of gauges.
Name	From the drop-down list, select the appropriate field for the
	gauge.
Value	From the drop-down list, select the value for the gauge.
Function	From the drop-down list, select the appropriate function of
	the selected value.
	Available options vary based on whether the selected value is a numeric field, date field, and so on.
Format	From the drop-down list, select the appropriate format to
	display the field values on the report.
	Available options vary based on the data type.
Sort	From the drop-down list, select the appropriate field based
	on which you want to arrange the gauges.
Function	From the drop-down list, select the appropriate function of
	the selected value.
	Available options vary based on whether the selected sort
	value is a numeric field, date field, and so on
Sort (z-a)	Select the check box to arrange gauges in descending order.
Minimum	Enter the minimum value of the gauge.
Maximum	Enter the maximum value of the gauge.
Color	Enter details of colors for each percentage on the gauge.
	Additionally, enter details about transitioning of the colors
	between the mentioned colors.
Gauge Style	Click the appropriate option.
Show values in currency	If the selected field is a currency field, then select the check
format	box to add currency format to the gauge.
Target report	Select the sub-report to be displayed when you hover over
	the gauge on the report.
Effect	If the <b>Target</b> report is selected, then select the appropriate effect for the sub-report.
Continue to Misc	Optionally, click to continue to the next tab in the report
	design process, the <b>Misc</b> tab.
Preview	Click to preview the report in the <b>Preview</b> tab.

- 11. To configure title, header, footer, and other necessary details for the report, perform the following steps:
  - a. Click the **Misc** tab.

🕞 Back 🚡 Save 💪 SaveAs 🖨 Print 🗞 Export Options 👻 🛃 Email Report	Filters Preview
Report Header Image Justification:	
Title	
	<b>L</b>
Description	T
Header	
	L
Footer	
	L
Limit Outputs to CSV	
Share With Rights	
Everyone V None V	

Figure 30: Misc Tab

b. Provide the appropriate information to the properties available in the Misc tab, as described in the following table:

Feature	Description			
Report Header Image	Click and select the appropriate report header justification.			
Justification	Note:			
	• 🗉 indicates left alignment.			
	• 🔹 indicates right alignment.			
	• Mindicates middle alignment.			
	To change the function, click the box repeatedly until the appropriate function is displayed.			
Title	Enter the title of the report, and then ${ m click}\square$ to set the			
	alignment of the title on the report.			
Description	Enter the description of the report, and then click $\Box$ to set the			
	alignment of the description on the report.			
Header	Enter the header, and then click $\square$ to set the alignment of the			
	header on the report.			
Footer	Enter the footer, and then click $oxdot$ to set the alignment of the			
	footer on the report.			
Limit Outputs to CSV	Select the check box to view the above configured data of the			
	report only when exported as a CSV file.			
Share With	From the drop-down list, select the appropriate roles with			
	whom you want to share the report.			

Feature	Description
	Users with the selected roles can now generate this report. Available roles are the roles assigned to you at the enterprise level.
	Note: Selecting the Everyone option shares the report with
	users in the roles that are assigned to you. For example, if you
	are assigned the Project Manager and the Director role, and
	you have shared a report using the <b>Everyone</b> option, then the
	or the Director role
Rights	Corresponding to the selected roles with whom the report is
	shared, select any of the following options, as applicable:
	• None: This option specifies there are no rights to view
	or modify the report.
	• Full Access: This option provides the rights to view,
	modify, and save changes made to the report.
	• <b>Read Only</b> : This option provides the rights to view, add,
	or remove filters, and modify the existing filter values.
	Users can modify the design of the report and save it
	as a new report but cannot overwrite the existing
	• View Only: This option provides the rights only to
	generate the report and the report cannot be modified.
	<ul> <li>Locked: This option provides the rights only to view</li> </ul>
	and modify existing filter values. Users cannot add or
	remove filters or fields. The changes made to the
	report cannot be saved.
Owner	By default, the name of the logged-in user is displayed.
	Optionally, enter the name of the owner of the report.
Drill Down Keys	From the drop-down list, select the column names that must
Ignoro Eirot Koy	be displayed in the sub-report.
Ignole First Key	selected from the <b>Drill-Down Keys</b> field in the sub-report
Schedule	Select time and date for delivery of the report.
Repeat Type	Select the schedule for repeat delivery of the report.
Send Email as	Select the mode of sending the report by email.
Recipients	Enter the email addresses of recipients, separated by
	commas.
Continue to Style	Optionally, click to continue to the next tab in the report
	design process, the <b>Style</b> tab.
Preview	Click to preview the report in the <b>Preview</b> tab.

- 12. To configure the necessary styles for the report, perform the following steps:
  - a. Click the **Style** tab.

REPORT DESIGNER	e 🖏 SaveAs 💼 Print 🦓 Export Options 👻 🖪 Email Report	
Data Sources	Fields Summary Chart Chart2 Gauge Misc Style Filters Preview	A
Border color	Header color Header foreground color	
(Default)	<ul> <li>(Default)</li> <li>(Default)</li> </ul>	
Item color	Item foreground color Alternating item color	
(Default)	✓ (Default) ✓ (Default) ✓	
Ample grid       Number       1       2       B		
		*

Figure 31: Style Tab

b. Provide the appropriate information to the properties available in the **Style** tab, as described in the following table:

Feature	Description	
Border color	From the drop-down list, select the appropriate color for the	
Header color	grid cells in the report.	
Header foreground color	Based on the options selected in these fields, the Sample grid	
Item color		
Item Foreground color		
Alternating item color		
Restore Default	Click <b>Restore Default</b> to revert all the previously mentioned	
	controls' settings back to their defaults.	
CSS	You can define any custom CSS to be used on the report	
	inside the text box.	
	You can use the browser object inspector to discern CSS	
	class names used on the grid so you can override them.	
Landscape printing (PDF)	Select the check box to generate PDF outputs for the reports	
	from the report viewer in landscape mode.	
	Otherwise, the report is printed in portrait mode.	
Show page number	Select the check box to display the page number on all page-	
	dependent printed reports.	
	This is not applicable to the report viewer or to XML, XLS, and	
	CSV exports.	

Show date and timeSelect the check box to display the date and time on all page- dependent printed reports. This is not applicable to the report viewer or to XML, XLS, and CSV exports.Use paginationSelect the check box to enable the report viewer to use paging.Add bookmark for each visual groupSelect the check box to enable bookmarks on each visual group.Page Break After Visual Groups (PDF)Select the check box to enable each visual group to receive its own page when exported. This is not applicable to the report viewer or to XML, XLS, and CSV exports.Minimize Grid WidthSelect the check box to enable adjusting the margins of the data grid to match the size of the data. This can result in columns that are not uniform size.All field headers boldSelect the check box to enable all field headers to be in italics.Remove Headers for CSV ExportSelect the check box to enable the report layout to change dynamically based on the size of the screen.Columns WidthEnter the column width for the reports.Visual Group StyleFrom the drop-down list, select how you want the visual groupings to be displayed.Items Per Page (In Viewer)Enter the number of pivot columns to be displayed in each
dependent printed reports. This is not applicable to the report viewer or to XML, XLS, and CSV exports.Use paginationSelect the check box to enable the report viewer to use paging.Add bookmark for each visual groupSelect the check box to enable bookmarks on each visual group.Page Break After Visual Groups (PDF)Select the check box to enable each visual group to receive its own page when exported. This is not applicable to the report viewer or to XML, XLS, and CSV exports.Minimize Grid WidthSelect the check box to enable adjusting the margins of the data grid to match the size of the data. This can result in columns that are not uniform size.All field headers boldSelect the check box to enable all field headers to be in italics.Remove Headers for CSV ExportSelect the check box to enable all field headers to be in italics.Remove Headers for CSV ExportSelect the check box to enable the report layout to change dynamically based on the size of the screen.Columns WidthEnter the column width for the reports.Visual Group StyleFrom the drop-down list, select how you want the visual groupings to be displayed.Items Per Page (In Viewer)Enter the number of pivot columns to be displayed in each
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page exported page.
Optionally, select the check box against <b>Split all columns</b> to
split all the columns, and select the check box against <b>Page</b>
break on split to enable a page break on splitting the
columns.
Report order It enables you to set the order of items to be included in the
report (Summary, Chart, Gauge, Map, and Detail).
<b>Note:</b> The detail grid is the one created on the <b>Fields</b>
tap.       Field!)/alus aslume noise
Field value column pairs
Show main report in Field I. Select the check boy to another the antire detail grid to be
Value style
value sigle         showin using the defined field value sigle.           Showing many report in         Soloot the check box to check box to check box.
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Feature	Description
Continue to Filters	Optionally, click to continue to the next tab in the report
	design process, the <b>Filters</b> tab.
Preview	Click to preview the report in the <b>Preview</b> tab.

13. To add multiple filters for a report, perform the following steps:

a. Click the **Filters** tab.

ita	Sources Fleids S	Summa	ry Chart Chart2 Gaug	e Misc Style Filters Preview	
	Filter Field		Operator	Value(s)	Alias
1	Award Date	~	Equals (Calendar) 🗸 🗸		
2		~	🗸		
3	•••	~			
D Re	Show Filters In Report I quire At Least One	Descrip	tion <ul> <li>Parameters in Viewer</li> </ul>		

#### Figure 32: Filters Tab

b. Provide the appropriate information to the properties available in the Filters tab, as described in the following table:

Feature	Description
Filter Field	From the drop-down list, select the appropriate field for the
	filter.
Operator	From the drop-down list, select the appropriate operator for
	the filter.
Value(s)	Based on the selected operator, from the drop-down list,
	enter or select the appropriate value for the filter.
	Note: This feature is not applicable for Boolean operators
	and the generic operators (top three options) in the list.
Alias	Enter the alias of the filter.
Blank	Select the check box to ensure the filter retrieves the
	information that matches the value entered or selected in the
	Value(s) field and also data that has a null value in that field
Param	Select the check box.
	This will display the filtered report in the report viewer and
	allow the user to change the filter value. If it is not checked,
	then the filter will not be visible to the user and the user will
	not be able to change the filter.
Require	Select the check box to set mandatory rules for the filter.

Feature	Description
Other buttons	Optionally, corresponding to a row, use the following buttons
	to delete existing rows, insert new fields, and move fields:
	<ul> <li>Click I to delete the existing row.</li> </ul>
	<ul> <li>Click storing to insert a filter above the existing field.</li> </ul>
	<ul> <li>Click To insert a filter below the existing field.</li> </ul>
	<ul> <li>Drag I to move the field up or down the order.</li> </ul>
Show Filters In Report	Select the check box to add the filters being used to the
Description	Description field of the report when the report is viewed in
	the Report Viewer or is exported.
Require	From the drop-down list, select the appropriate parameters.
	You can select any of the following options:
	• <b>All</b> - All the field filters must be selected.
	<ul> <li>At Least One - Any one of the filter fields must be</li> </ul>
	selected.
	• <b>The First</b> - The first filter field must be selected.
	<ul> <li>The First Two - The first two filter fields must be</li> </ul>
	selected.
Filter Logic	Enter logic for the filter using Boolean Logic.
Preview	Click to preview the report in the <b>Preview</b> tab.

#### 14. Click Save.

If you have not previously saved the report, a dialog box is displayed to enter the report name and select a category.

Alternatively, click **SaveAs**.

A dialog box is displayed to enter the report name and select a category.

- a. In the Input report name field, enter the name of the report.
   Note: Refrain from using special characters such as ' (apostrophe) in the report name.
- b. To categorize the report, from the Category drop-down list, select the category for the report.
   You can either select from the existing categories or create a new category.

To add a new category, perform the following steps:

i. From the Category drop-down list, select (Create New).A dialog box to enter category name is displayed.

Input repor	't name
Acquisitions	
Catego	ory
Acquisitions	~
ОК	Cancel



- ii. In the **New category name** field, enter the name of the category.
- iii. Click Create.

The category is created and displayed in the **Category** drop-down list.

iv. Click **OK**.

15. In the navigation pane, click **Ad-hoc Reports**.

The report is available in the **REPORTS LIST** page.

### 3.3. Advanced Field Settings

Advanced field settings provide more granular control over what data is displayed in the report. You can access these settings by clicking the gear icon 🔄 to the right of any row on the **Fields** tab or the **Summary** tab in the report designer.

1. Provide the appropriate information in the properties available in the **Advanced Properties** dialog box, as described in the following table:

Feature	Description
Column Group	Enter a label to this column that can work over multiple consecutive columns. Any other column that shares the same label will be included in the grouping.
Break Page After VG (PDF)	Select the check box, as applicable. If this check box is selected and this field is also a visual group, then it generates a page break in a printed report every time this field has
Multiline Header	a different value.
Mututine fieadei	length of the header is longer than the set width of the column. Each space between words works as a line breaker.
Hide this field	Select the check box to hide the field from the display when you generate the report. This is useful for using expressions on multiple fields but when only one of the fields should be displayed.
Separator	Select the check box to break out Analysis Grid by this field. The function is identical to VG in a normal table. Since VG is used to define the hierarchy of the Analysis Grid, the <b>Separator</b> option must be used to visually group the Analysis Grid.
Sort (z-a)	Select the check box to sort the field in descending order.
Italic	Select the check box to show the column in italics.
Bold	Select the check box to show the column in bold.
Width	Enter the width of the column.
Label Justification	Click and set the column label to the left, right, or middle of the row.
Value Justification	Click and set the value of the field to the left, right, or middle of the row.
Subreport	Select the drill-down sub-report. The list contains only reports that have a drill-down key set for them. <b>Note</b> : The <b>Automatic</b> option attempts to choose a sub- report by matching the drill-down key to the selected field and cannot discern between two sub-reports that use the same drill-down key.
Drill-Down Style	<ul> <li>From the drop-down list, select the appropriate style. Available options are:</li> <li>Link – opens in same browser window.</li> <li>Link(New Window) – opens in new browser window.</li> </ul>

Feature	Description
	<ul> <li>Embedded – embeds the drill-down results into the main report.</li> </ul>
	• <b>Popup</b> – opens the results on a pop-up screen.
	• <b>Combo key</b> - Used in combination with one of the above.
	When this setting is chosen for the second drill-down key, the value of both fields will be passed from the main report to the sub- report.
Url	Enter a custom Url to redirect to when the value in this cell is clicked.
Subtotal Function	Select a function for subtotals displayed with the field.
	The default value is "Sum". This only applies to the bottom sub- totals and not the side sub-totals
	If set to <b>Expression</b> , then <b>Subtotal Expression</b> box is displayed
	allowing you to set an expression for the subtotal. This functions in
	the same fashion as the typical expression box.
Gradient Cells	Select the check box to use a gradient color for cells shading.
Shading	
Text Highlight	Enter a range to highlight the text.
Cell Highlight	Enter a range to highlight the cell.
Value Ranges	Enter the values for number ranges. (i.e., setting this to 0 to 10:
	Under will display the text "Under" when it encounters a value
	between 0 and 10 for that column).
Expression	Enter a customized mathematical or SQL expression to show as the value for the column cells.
Expression type	Select the data type of the field
	This is most useful when you are generating output with an
	expression and need to specify a data type.
Group By	Select the check box to include this field in the group by statement of
Expression	the query.
	This is functionally the same as the Group function, except
	applicable to expression output within a field rather than to the field
	noon.

#### 2. Click OK.