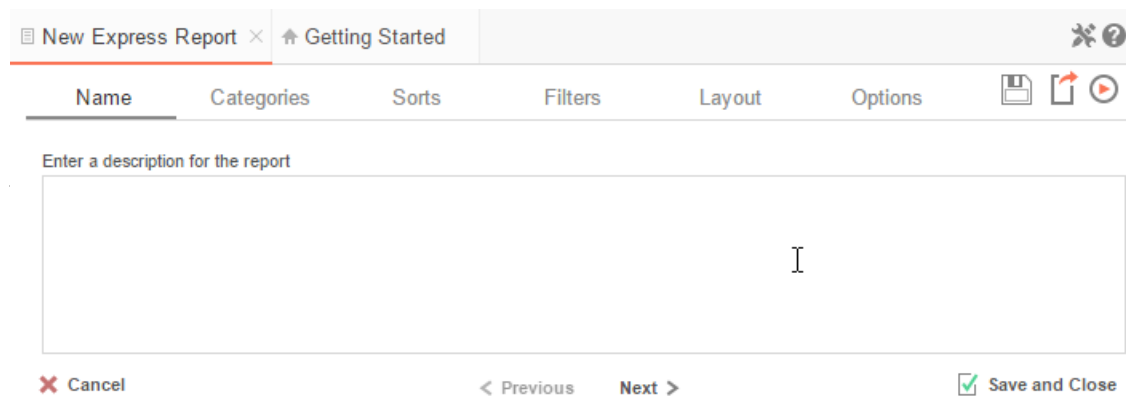




## Express Reports




The Express Report Wizard is an interactive tool which allows you to quickly create and edit Express Reports.

To navigate the wizard, either click the desired tab or use the buttons at the bottom.

To Save an Express Report, click the save  button.



New Express Report  Getting Started  

Name Categories Sorts Filters Layout Options   

Enter a description for the report

Save and Close

The Express Report Wizard has six sub tabs. The **Name**, **Categories**, and **Layout** tabs must be completed while the other tabs are optional.

## Name Tab

In the Name Tab, enter a report name and click on the Folder where the report will be saved.

The report name can be up to 255 characters. Avoid special characters such as ? : / \ \* " < >.

A report's description appears at the bottom of the Main Menu when it is selected. The description text is also used when searching for a report.

**NOTE.** You cannot create a report inside a folder that is read-only (🔒).

The screenshot shows a dialog box titled "New Express Report" with a close button (X) in the top right corner. Below the title bar are tabs for "Name", "Categories", "Sorts", "Filters", "Layout", and "Options". The "Name" tab is active. The dialog contains the following elements:

- A label "Enter the report name" above a text input field containing "New Express Report".
- A label "Select folder for the report" above a tree view of folders:
  - > Customer Reports
  - > Order Details 2016 (highlighted with a red bar)
  - > Report Examples
  - > Sales Reports
- A label "Enter a description for the report" above a large empty text area.
- At the bottom, there are three buttons: "Cancel" (with a red X icon), "< Previous" (disabled), and "Next >" (disabled). On the far right, there is a "Save and Close" button (with a green checkmark icon).

## Categories Tab

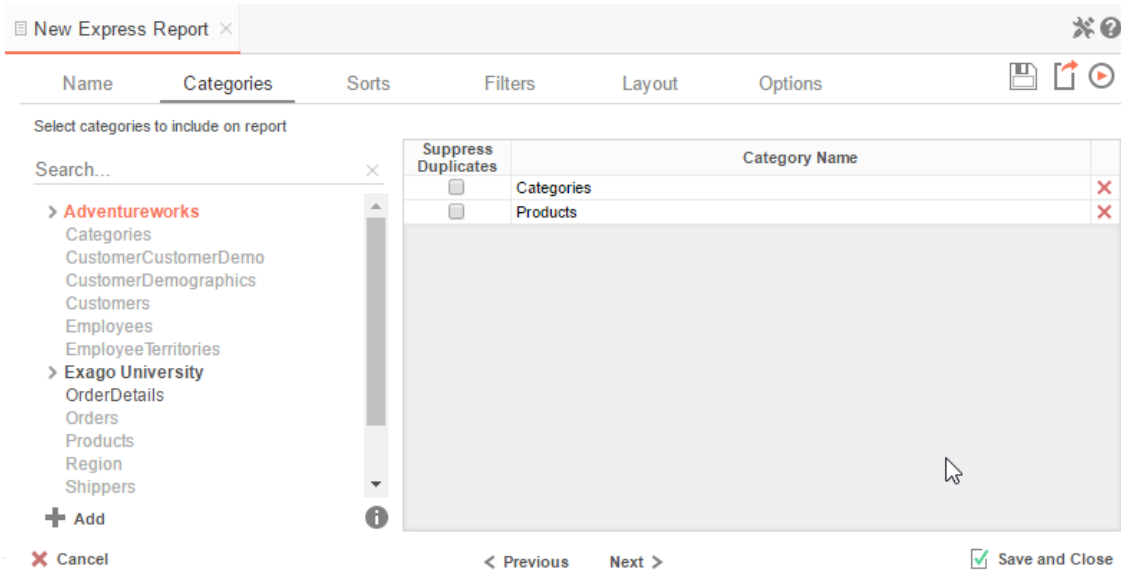
In the Categories Tab, select the Data Categories that you would like to have access to on the report. It is important to understand two terms: Data Category and Data Field.

### Data Category

A Data Category is a data object that has several attributes. E.g., Orders is a category; each order has an ID, a date, a customer etc.

### Data Field

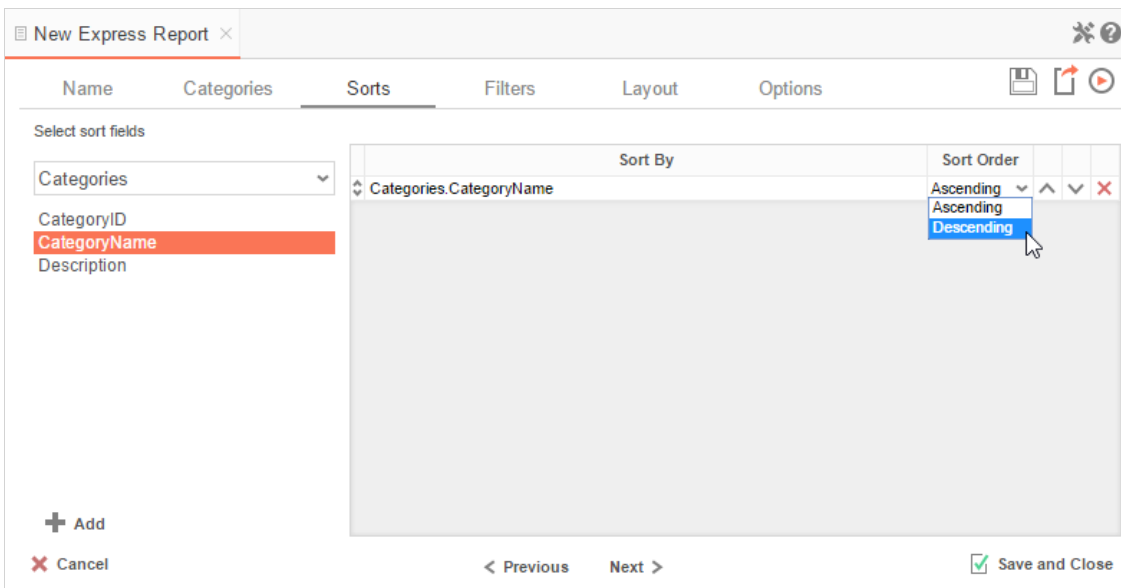
A Data Field is a single attribute within a category. E.g., **Orders.OrderID** is numeric value that identifies a specific order.



- To add a Data Category, either drag and drop it to the 'Category Name' Column, use the **+ Add** button, or double-click it.
- To search for a specific Data Category or folder, type its name into the Search box.
- To see what Data Fields are in a Data Category, click the information button (i).
- Check the 'Suppress Duplicates' box to suppress any repeated records from that category.
- To remove a Data Category, click the delete button (X).

## Sorts Tab

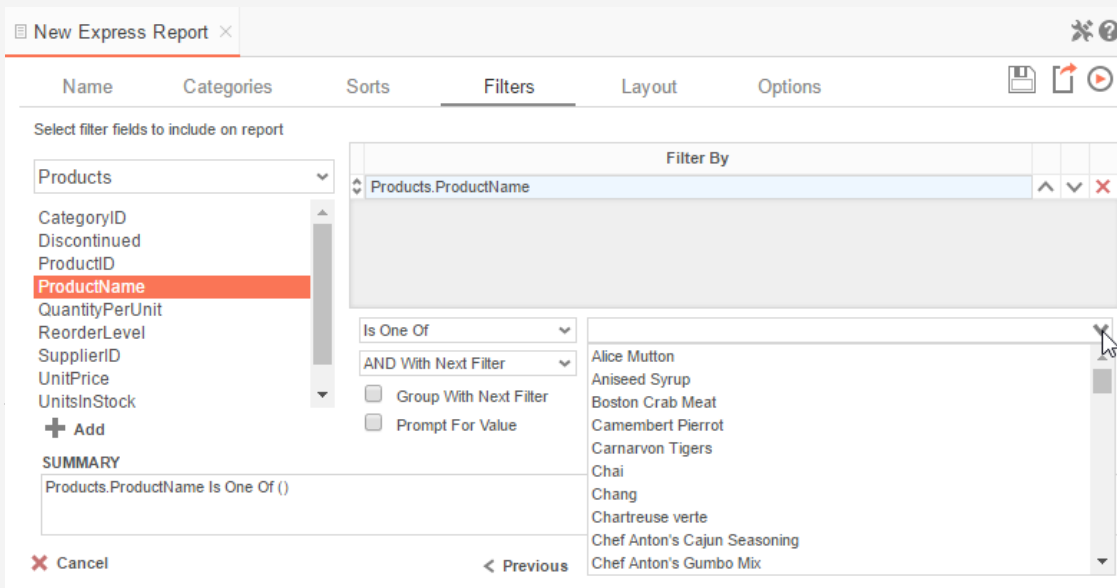
In the Sorts Tab, specify which Data Fields will be used to determine the order of data on the report.



- To sort by a Data Field, either drag and drop it to the '**Sort By**' Column, use the **+ Add** button, or double-click the field.
- You can sort each Data Field in ascending (A- Z) or descending (Z-A) order.
- Use the up (^) and down (v) arrows to indicate the sort priority.
- To remove a sort, click the delete button (X).

## Filters Tab

In the Filters Tab, create statements that will be used to filter the data when you execute the report.



There is no limit to the number of filters that can be defined. Filters can be numeric (up to eight decimals) or alphanumeric.

- To filter a Data Field, either drag and drop it to the 'Filter By' column, use the **+ Add** button, or double-click it.
- Use the up (^) and down (v) arrows to indicate the filter priority.
- To remove a filter click the delete button (X).
- Set the operator (equal to, less than, one of, etc.) by selecting it from the operator drop-down.
- Set the filter value by either entering it manually or selecting a value from the drop-down. If the Data Field is a date, the calendar and function buttons can be used to select a value.
- Check 'Prompt for Value' to allow the filter to be modified at the time the report is executed.
- Select 'AND With Next Filter' to require that the selected filter and the one below it are both true. Choose 'OR With Next Filter' to require that either be true.
- Check 'Group With Next Filter' to specify the precedence of the filters. Filters can be nested indefinitely by using the following keyboard shortcuts while a filter is selected:

**Ctrl + [** adds an open-parenthesis before the selected filter.

**Ctrl + ]** adds a close-parenthesis after the selected filter.

**Ctrl + Shift + [** removes an open-parenthesis from before the selected filter.

**Ctrl + Shift + ]** removes a close-parenthesis from after the selected filter.

## Layout Tab

In the Layout Tab, select which Data Fields that will appear on the report. For each Data Field chosen, the report will automatically create a column header and the Data Field. Additionally, sub-totals, grand totals, and page header/footers can be created.

New Express Report

Name Categories Sorts Filters Layout Options

Select fields to include on report

Products  
 CategoryID  
 Discontinued  
 ProductID  
 ProductName  
**QuantityPerUnit**  
 ReorderLevel  
 SupplierID  
 UnitPrice  
 UnitsInStock  
 UnitsOnOrder

+ Add + Add Blank

Page Header Page Footer Grand Total

Arial 8 B I U A Theme: Custom

**New Express Report**

ProductName	ProductID	UnitPrice	QuantityPerUnit
ProductName 1	ProductID 1	UnitPrice 1	QuantityPerUnit 1
ProductName 2	ProductID 2	UnitPrice 2	QuantityPerUnit 2
ProductName 3	ProductID 3	UnitPrice 3	QuantityPerUnit 3
ProductName 4	ProductID 4	UnitPrice 4	QuantityPerUnit 4

Cancel Previous Next Save and Close

## Display Data

- To place a Data Field on the report, either drag and drop it to the 'Data Field' column, use the **+ Add** button, or double-click it.
- To add blank columns that can be typed in click the **+ Add Blank** button. You can enter text into a blank column.
- Use the up (^) and down (v) arrows to indicate the order the Data Fields should appear on the report. The Data Field at the top will appear on as the leftmost column of the report.
- The Summary Function column is used to make subtotals and grand totals.
- To remove a Data Field, click the delete button (X).

For each Data Field added in the Sorts tab, a checkbox will appear in the Summarize By box. Using the 'Summarize By' box, you can display subtotals, grand totals, or headers for each unique value of a Data Field.

## Subtotals and Grand Totals

- To display subtotals, check the box of the category you want sub-totals for. Then, for each Data Field you want totaled, select a Summary Function (see below).
- To display grand totals check the **Grand Total** box. Then for each Data Field you want totaled, select a Summary Function (see below).
- Summary Functions:
  - Sum:** Totals the all of the data in the Data Field.
  - Count:** Returns the number of rows in the Data Field.
  - Average:** Takes the mean of the data in the Data Field.
  - Minimum:** Displays the lowest value in the Data Field.
  - Maximum:** Displays the highest value in the Data Field.

Data Field	Summary Function			
Products.ProductName	fx None	▼	▲	✕
Products.ProductID	fx Count	▼	▲	✕
Products.UnitPrice	fx Maximum	▼	▲	✕
Products.QuantityPerUnit	fx None	▼	▲	✕

Summarize By

Categories

Page Header  Page Footer  Grand Total

## Data Headers

To display a header for each value of a Data Field, click on the associated Data Category in the Summarize By box. Click the Data Category name next to the checkbox, and the Header Menu will appear.

- To include a blank row before each unique value of the selected Data Field, check the box 'Add space before each unique item'.
- To include a Header, check the box 'Include Header at the beginning'. In order to select the text that will appear as the header value, use the Header Text dropdown to select a Data Field or use the **Formula Editor** Button (*fx*) to create a formula.
- Use the 'Summarize by each unique' dropdown to specify if the header should repeat based on a specific Data Field or if it should repeat for all of the keys of a Category.
- Check the box 'Include Total at the end' to have a sub-total created for this Category.

## Page Header

To display information on the top of each page, click 'Page Header' below the 'Summarize By' box. A Page Header Menu will appear.

- Check the box 'Include Title at the top of every page' to display the name of the report on each page. If an image is also included, use the position dropdown to set where the title should appear and the number of columns it should span.
- Use the 'Change Image' button to upload an image to display at the top of each page. If a title is also included, use the position dropdown to set where the image should appear and the number of columns it should span.

## Footers

To display information on the bottom of each page, click 'Page Footer' below the 'Summarize By' box. Click 'Page Footer' next to the checkbox, and the Page Footer Menu will appear.

Summarize By

Categories

Page Header  Page Footer  Grand Total

- Check the box 'Include page number at the bottom of every page' to display the page number on each page. If an image is also included, use the position dropdown to set where the page number should appear and the number of columns it should span.

Use the 'Change Image' button to upload an image to display at the bottom of each page. If the page number is also included, use the position dropdown to set where the image should appear and the number of columns it should span.

Page Number


Include page number at the bottom of every page


Position:  Number of columns to span:

Image

Include image at the bottom of every page

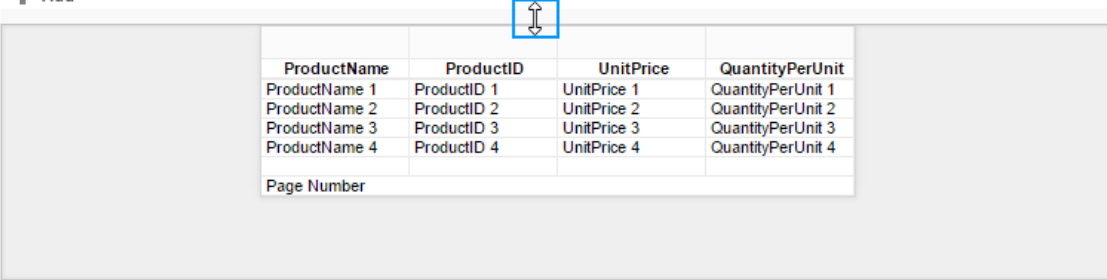
Position:  Number of columns to span:

 Change Image



## Preview

At the bottom of the Layout Tab, a preview will display how the report will appear based on the fields that have been added. You can increase/decrease the size of the preview or hide it altogether by dragging the top of the Express Report Designer box.



ProductName	ProductID	UnitPrice	QuantityPerUnit
ProductName 1	ProductID 1	UnitPrice 1	QuantityPerUnit 1
ProductName 2	ProductID 2	UnitPrice 2	QuantityPerUnit 2
ProductName 3	ProductID 3	UnitPrice 3	QuantityPerUnit 3
ProductName 4	ProductID 4	UnitPrice 4	QuantityPerUnit 4
Page Number			

Cancel Previous Next Finish

## Styling Express Reports

Above the preview is a toolbar. This toolbar can be used to stylize the Express Report. To utilize this toolbar, select the cell(s) you want to modify from the preview.





The following icons are available in the toolbar:

**Undo/Redo** – can undo or redo the last change made. You can also use **Ctrl+Z**/**Ctrl+Y** respectively. 


**Layout Options** – see **Layout Options** for more information. 

**Font** – see **Font** for more information.

**Foreground & Background Color** – see **Color** for more information.  

**Number/Date Format** – see **Formatting Cells** for more information. 

**Border Color** – see **Formatting Cells** for more information. 

**Alignment** – see **Alignment** for more information. 

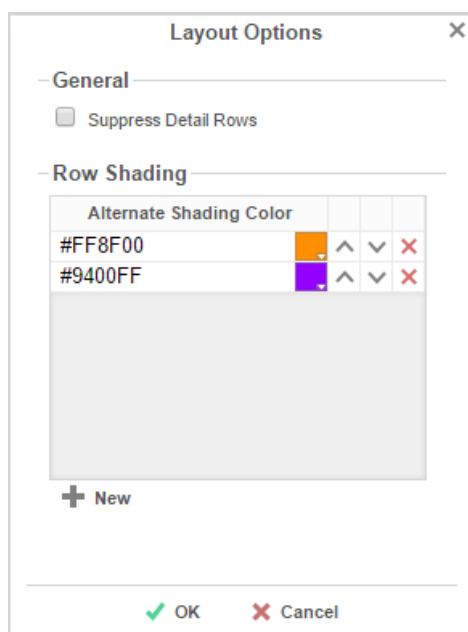
**Theme** – see **Theme** for more information. Theme:  

## Layout Options

In Layout Options, you can hide the detail information and set row shading.

- Check 'Suppress Detail Rows' to only display Sub-Totals, Grand Totals, Data Headers & Page Headers/Footers.
- To add row shading click the 'New' button and select a color from the color drop down or enter a hex value.

NOTE. Row Shading is only applied to the detail rows that contain Data Fields.



## Express Report Themes

The Theme dropdown can be used to quickly style the report using one of the pre-defined themes. After selecting a Theme, styling can still be modified. See **Styling Express Reports** for more information.

## Options Tab

The Options Tab allows you to control various report option settings.

## General Options

- From the 'Include Setup' menu select Top or Bottom to display the data categories, sorts, and filters at either the beginning or end of the report.
- Select which type of Filter menu to display when executing a report that has prompt-for-value filters.
  - **Default** – Display the default type of filter execution window.
  - **Standard** – Display the standard filter execution window.
  - **Simple with Operator** – Display a simplified filter execution window that only allows the operator and value to be changed.
  - **Simple without Operator** – Display a simplified filter window that only allows the filter value to be changed.



Check 'Always Show Filter on Execution' to show the filter menu and allow changes to be made each time the report is executed.

The screenshot shows the 'New Express Report' dialog box with the 'Options' tab selected. The 'Information' section is expanded, showing the following settings:

- Include Setup Info: No
- Filter Execution Window: Default
- Always Show Filters in Report Viewer:
- No Data Qualify Display Mode: Show Message

At the bottom of the dialog, there are buttons for 'Cancel', '< Previous', 'Next >', and 'Save and Close' (checked).

## Export Options

### General Export Options

- Use the Default Export Type drop-down to specify the default format for the report.
- Output types may be disabled by unchecking the boxes for 'Allowed Export Types'.

### HTML Options

- Uncheck 'Show Grid' to disable grid lines.
- Uncheck 'Simulate PDF' to have the report appear as though it is not on a page.

### Excel Options

- Check 'Suppress Formatting' to prevent the report formatting from exporting to Excel.

### Page Options

- Specify the size of the report in the 'Page Size' drop-down. Default is Letter.
- Set the orientation for the report in the 'Orientation' menu. Default is Portrait.
- Check 'Fit to Page Width' to scale all columns to fit the width of the page.

The screenshot shows the 'New Express Report' dialog box with the 'Options' tab selected. The 'Export' section is expanded, showing the following settings:

- General Options**
  - Default Export Type: Default
  - Allow Execution in Viewer: True
  - Allowed Export Types:  Excel  PDF  RTF  CSV
- Report Viewer Options**
  - Show Grid
  - Simulate PDF
- Excel Options**
  - Suppress Formatting
- Page Options**
  - Page Size: Letter
  - Page Orientation: Portrait
  - Fit to Page Width

At the bottom of the dialog, there are buttons for 'Cancel', '< Previous', 'Next >', and 'Save and Close' (checked).

## Advanced Options

In the Advanced Options, an Express Report can be converted to an Advanced Report.

**\*\*\* IMPORTANT. This CANNOT be undone.**

Click the 'Convert simple report to an advanced report' button to convert an Express Report to an Advanced Report.

Name	Categories	Sorts	Filters	Layout	Options
General	<b>Convert Options</b>				
Export	Convert Express Report to an Advanced Report (this cannot be undone)  →				
Advanced					