Guide to Reporting in Centerbase

Queries

Queries show data from individual Data Objects.

Accessing Queries

Customizing Queries

View

Standard Reports

Types of Standard Reports

Basic Reports
Custom Reports
System Reports

Accessing Standard Reports

View

Advanced Reports

Types of Advanced Reports

ExpressView
Advanced Reports
Dashboards

Building Reports

Express Reports
Advanced Repoerts

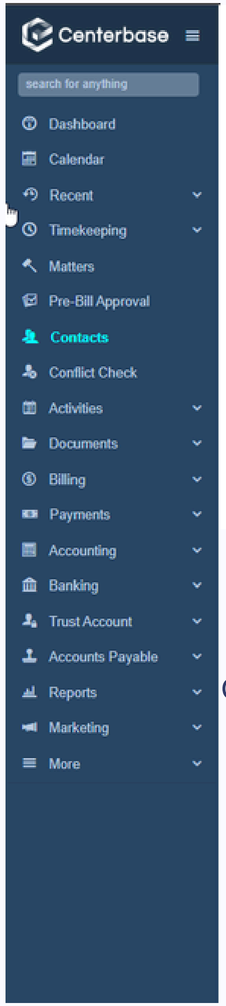
Configuring Reportable Data

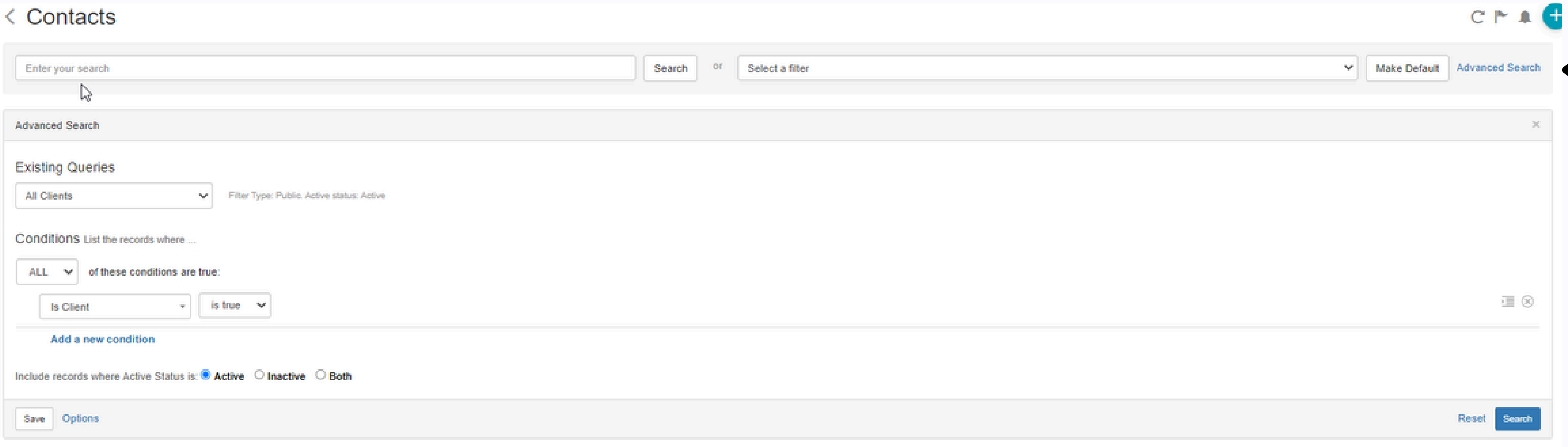
View

Centerbase

Accessing Queries

Access queries via the left navigation pane. Most, but not all left navigation menu items will have queries.



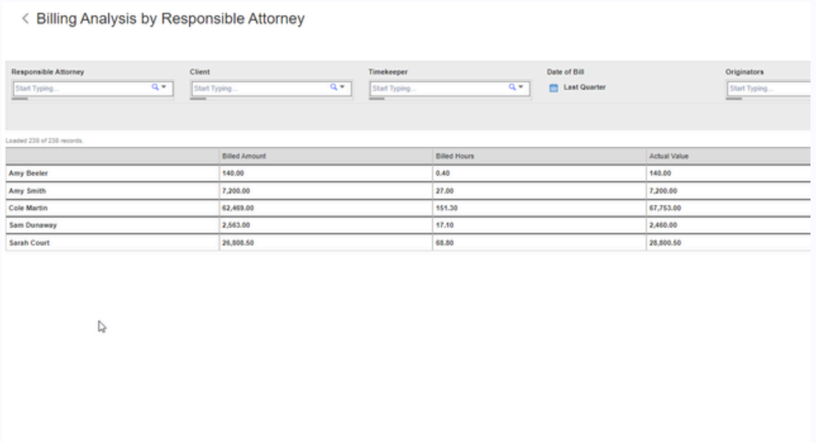


Customizing Queries

Customizing Queries

- To initiate an Advanced Search, find and click “Advanced Search” located in the top right corner of the query interface.
- You can either select an existing query from the dropdown menu or create your own by setting specific conditions.
- Save your query by clicking on “Save” or “Options,” where you can assign a name and choose whether it should be public (accessible to all firm members) or private.
- To set an Advanced Search as the default view for a query, select it from the dropdown in the top right corner and click on “Make Default.” Keep in mind that default settings are unique to each query and user.
- Use the left navigation pane to locate queries. While most items in the left navigation menu will include queries, not all will.
- Accessing Queries

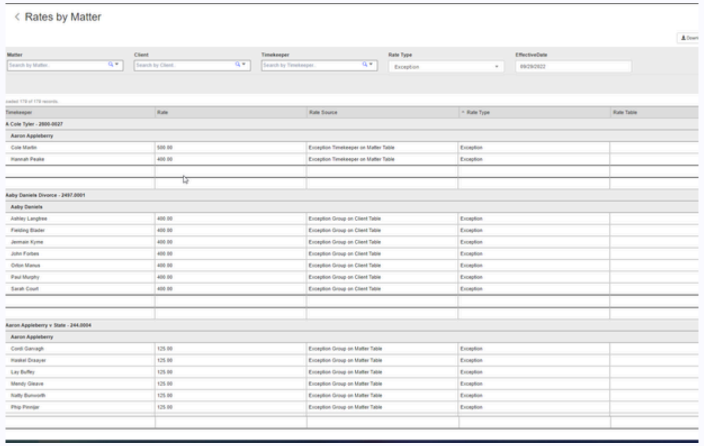
Types of Standard Reports



Basic Report

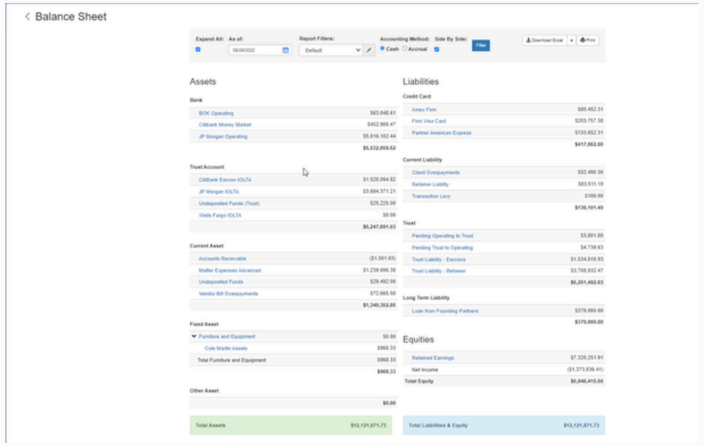
Basic Reports provide data from a single data object. Users can customize columns, grouping, filtering, and printing settings according to their preferences.

Learn how to create Basic Reports



Custom Rreport

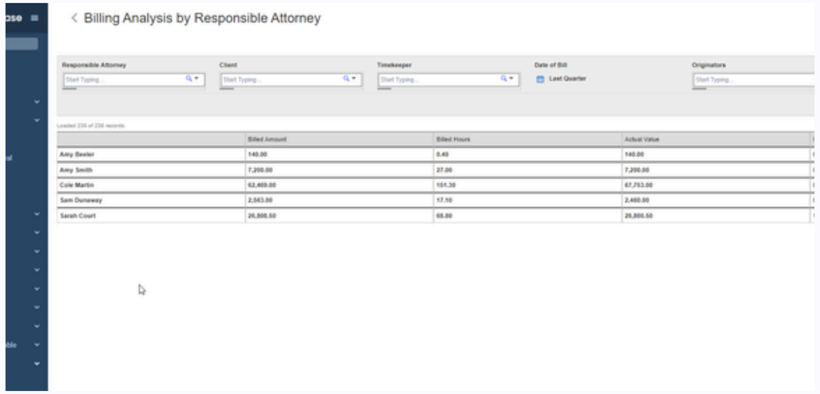
Custom Reports return data from more than one data object by way of stored procedures. Columns, grouping, filtering, and printing settings can be adjusted in accordance with users' preferences.



System Reports

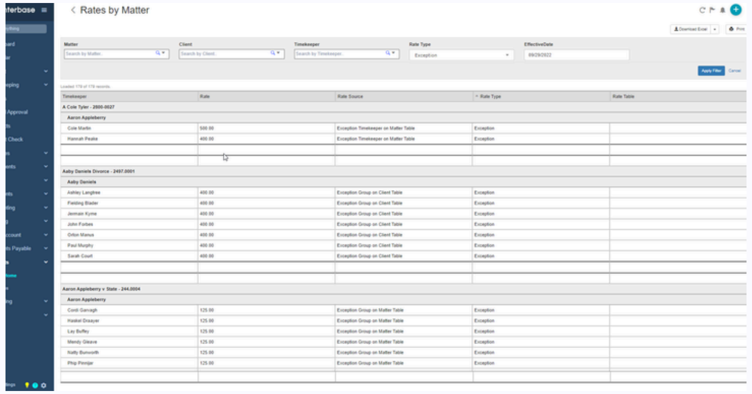
System Reports return data from one or more data objects, also by way of stored procedures. Users are unable to modify columns, grouping, filtering, and printing settings since changes to these reports affect all users. Unlike other Basic and Custom reports, System Reports can be added to the left navigation.

Types of Advanced Reports



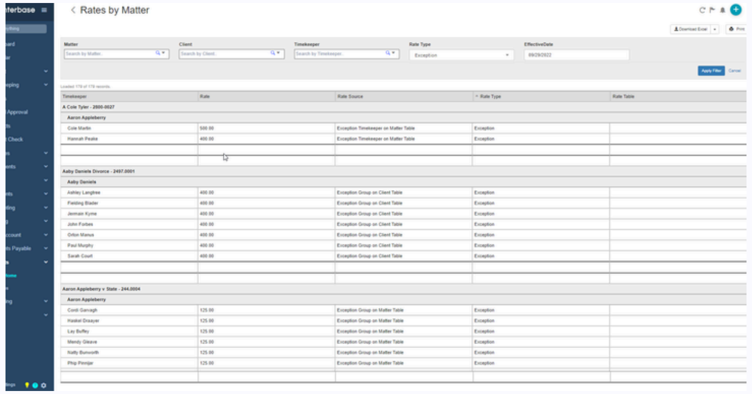
ExpressView

ExpressView reports are designed to make understanding your data as easy as possible. Think of them as visual representations of individual Data Objects – essentially, they showcase the information from a single Data Object, although they have the capability to handle more. With ExpressView reports, you have the power to personalize your view by adding fields, grouping, sorting, filtering, and incorporating aggregate functions. Additionally, you can take advantage of formulas to tailor the data to your specific needs. Plus, for a more visual analysis, you can effortlessly convert your data into a graph to enhance interpretation.



Advanced Report

An Advanced report can compare data across multiple Data Objects at a time. Users can group, sort, filter, create repeating groups, and leverage advanced formulas. Advanced Reports are made using a spreadsheet-like cell-grid interface and are highly configurable.

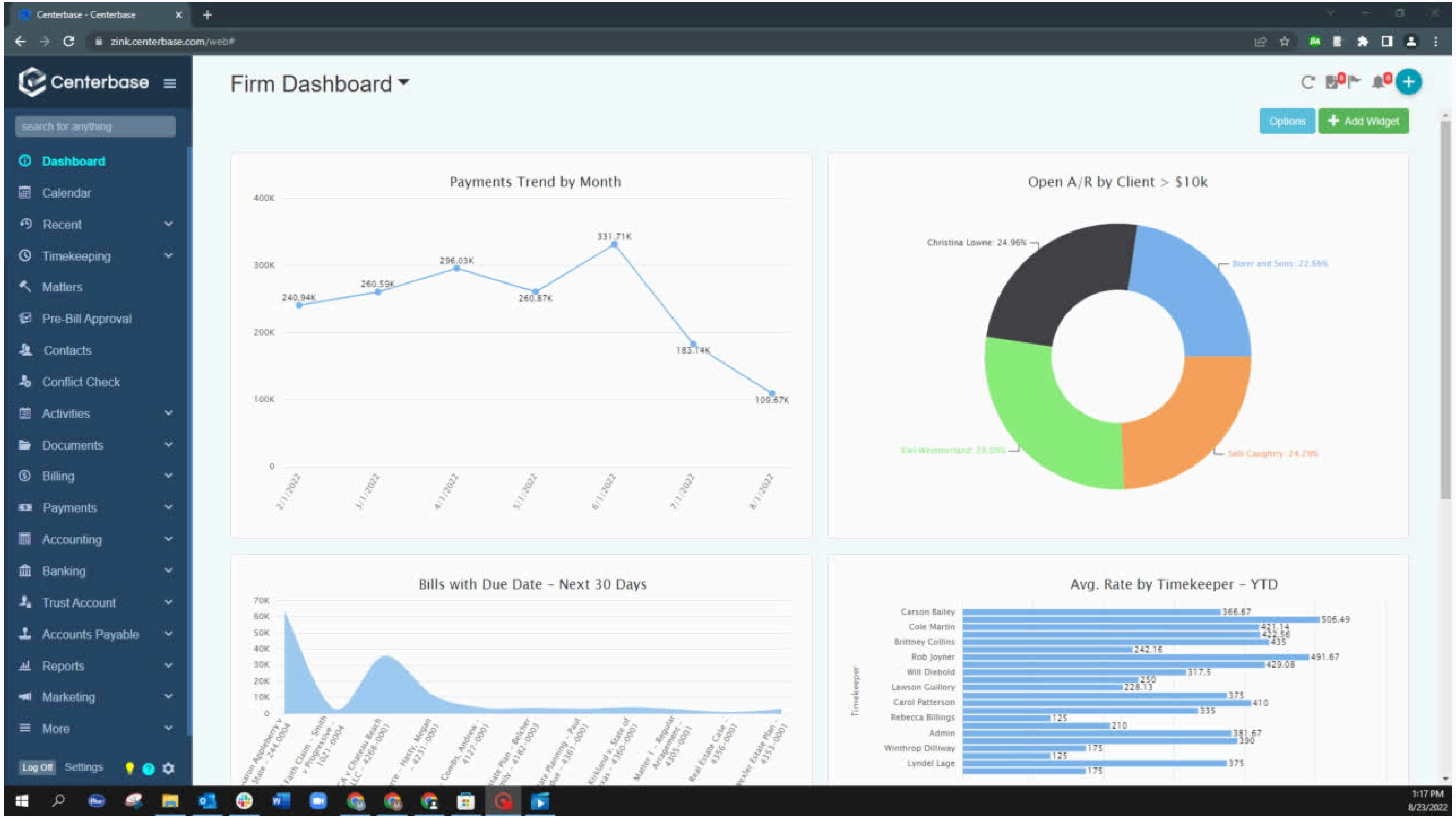


Dashboards

Dashboards combine one or more reports onto a canvas, providing a way to create a personalized arrangement and display of reports. ExpressView and Advanced Reports can be added to a Dashboard, and visualizations can be created directly on the canvas without needing to make a separate report. Dashboards can also have text, borders, images, interactive filters, and embedded web pages. Dashboards run in the browser, can have interactivity such as dynamic filtering and drilldowns, and can refresh on a timed interval.

Advanced Reports: Making your data reportable

Before creating any reports, please make sure your data is reportable by following the steps outlined below.

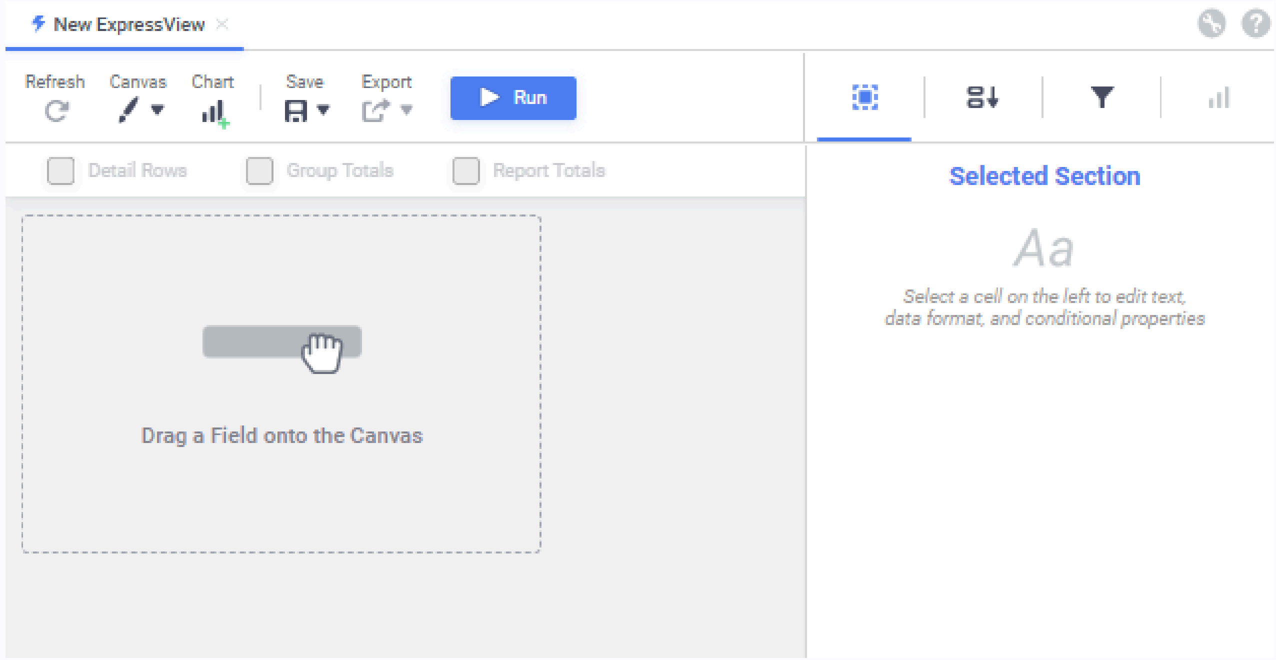


ExpressView

To learn how to build an ExpressView report, it is important to learn how the canvas is structured (its anatomy); then one can more easily follow the steps to complete the build.

Anatomy of an ExpressView Report

ExpressView reports start with a blank canvas onto which users add fields.

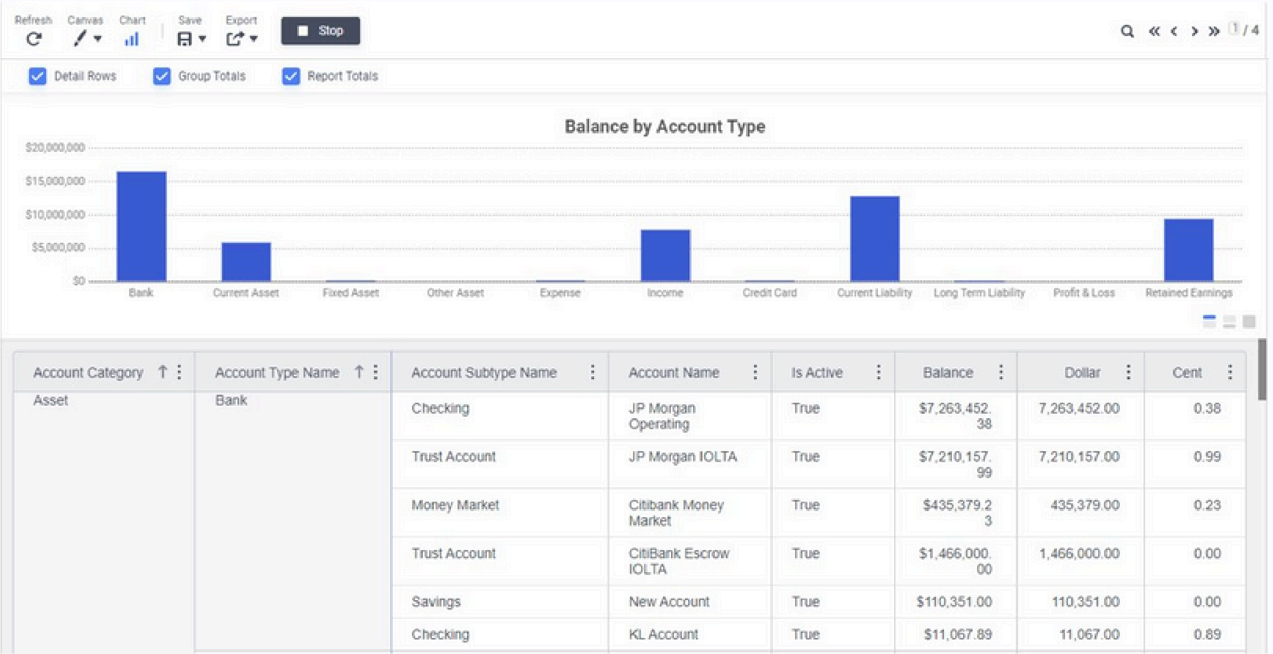


Building an ExpressView report

1. On the main menu in the top-left corner, click the Create New Report.
2. Click ExpressView to start the ExpressView Designer.
3. Add the necessary Data Fields to the canvas.
4. To organize the report, drag-and-drop a Data Field to Add Group. The report automatically sorts by ascending order.
5. Filter the output by clicking on the filter icon. Drag and drop fields into the filter.
6. Choose an aggregate sum, if desired.
7. Add a chart, if desired.
8. Click Run to view the results.

💡 **Data Fields do not have to be included as columns in a report to be used as filters.**

ExpressView + Charts



Adding a Chart Visualization

1. Click the "Add Visualization" icon in the toolbar.
2. A bar chart is added automatically, populated with ExpressView data.
3. On the Properties Pane's Visualizations tab, choose your preferred chart type: Bar and Column, Pie and Other Single-Series, Line and Area, or Miscellaneous.

Customizing Chart Placement:

1. In the lower-right corner, select the chart's position on the canvas:
2. Top: Chart at the top; data at the bottom.
3. Bottom: Chart at the bottom; data at the top.
4. Full: Chart fills the canvas; data is hidden.

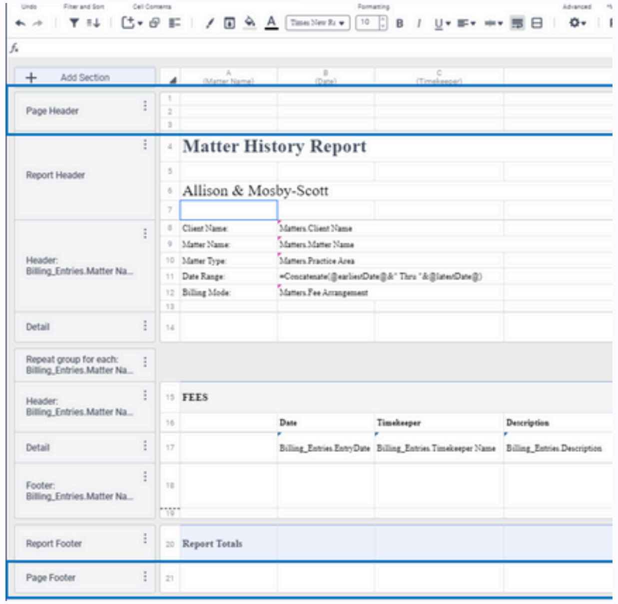
Customizing Chart Labels:

1. Use the Properties Pane to customize labels:
2. Drag a data field onto the chart for labels.
3. In the Visualizations tab, click Data and drag a field to the Labels area. Customizing Chart Values:
4. Customize values using the same process for adding labels:
5. Drag a data field onto the chart for values.
6. In the Visualizations tab, click Data and drag a field to the Values area. Styling Your Chart:
7. Set styling in the Appearance section:
8. Chart Titles: Add titles, subtitles, and labels with unique fonts and colors.
9. Chart Colors: Choose a palette or customize colors. Enable 3D style if desired.
10. Chart Data: Set axis min/max values, exclude values, and apply sorting preferences.

Advanced Reports

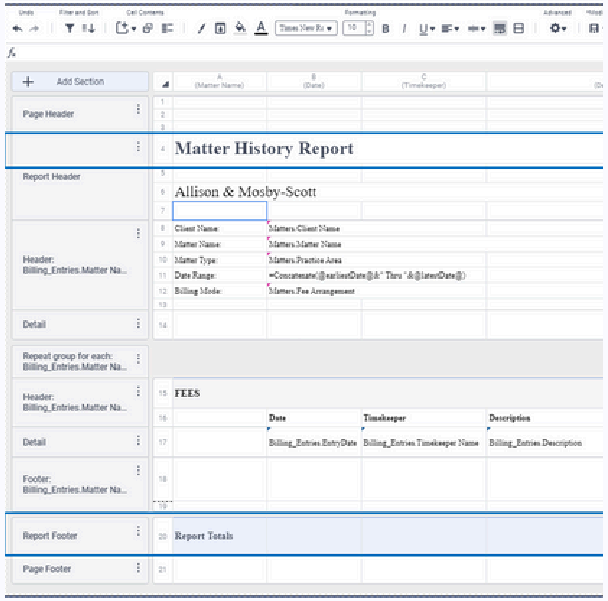
Anatomy of an Advanced Report

Advanced Reports can be customized in appearance. The initial workspace is divided into two sections: a Page Header section, featuring three rows, and a Details section. With three columns labeled A-E, users have the flexibility to augment columns by simply right-clicking in the Column Header and adjust rows by electing the '+ Add Section' Tab.

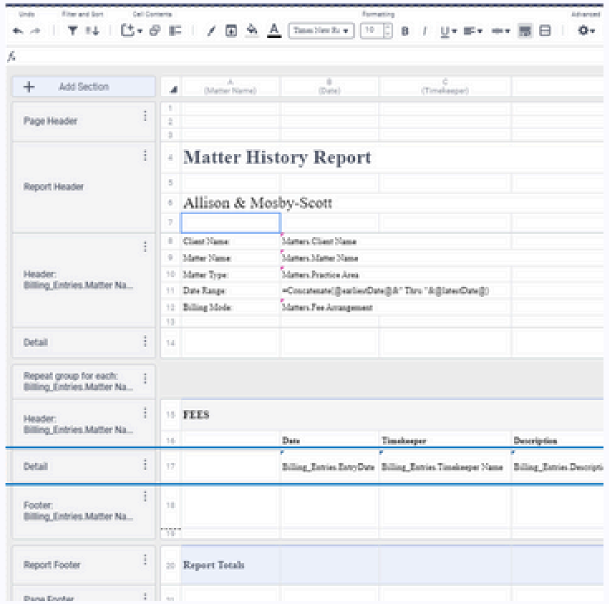


- **Page Header** – titles of columns
- **Page Footer** – display the page number* and/or confidentiality notices
  - Can span multiple rows.

Tip: Page Headers and Footers are not intended to perform calculations or display data fields.



- **Report Header** – report title, introductory information
- **Report Footer –** concluding information such as summary of the report data with aggregate formulas and visualizations
  - Can span multiple rows.



- **Details** – Used for showing the actual data values
- **Standard Groups**– data is assembled into related categories that each share a unique attribute.
- **Repeating Groups**- organize and display data that contain multiple one-to-many relationships.
  - Groups can have headers & footers

Tip: Groups are not called "group header", rather "header: [object.field]"

Advanced Reports

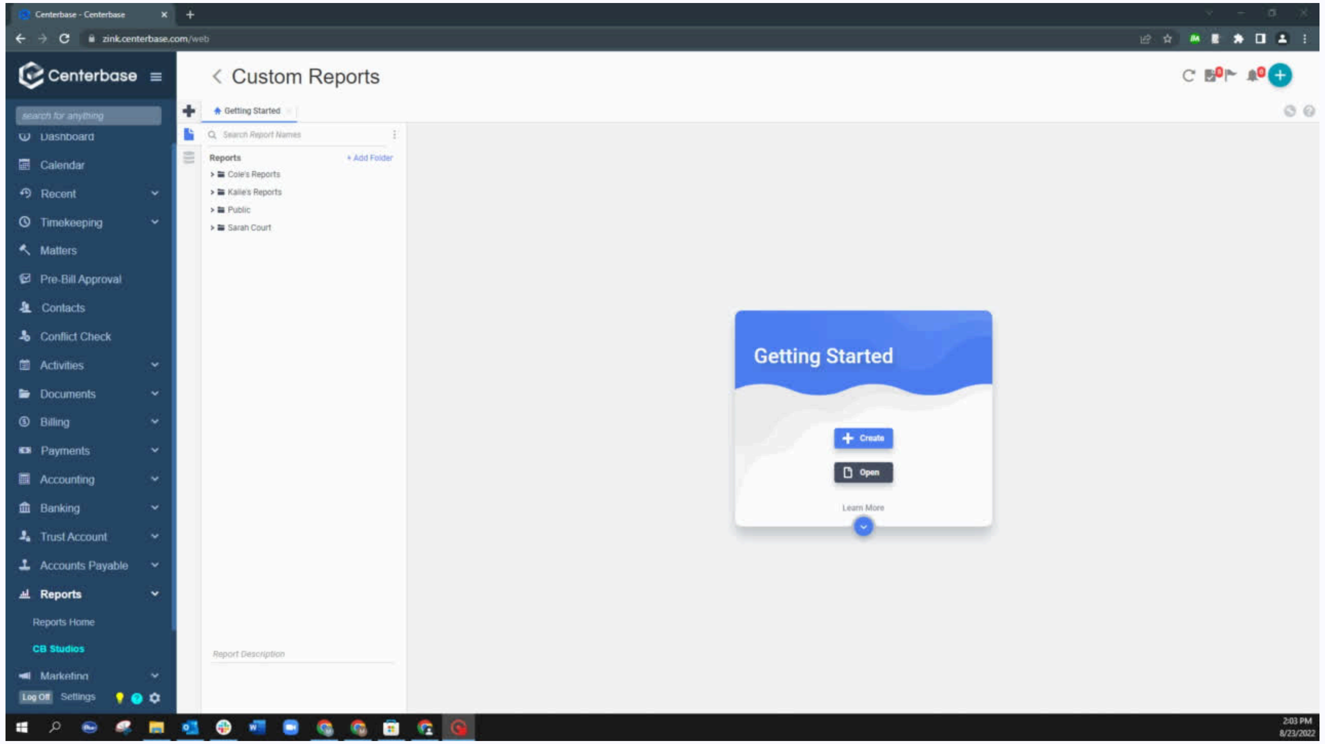
Building an Advanced Report The steps taken to build an Advanced Report, of course, depend on the type of Advanced Report one is building. The steps below are meant to be broadly applicable for most reports:

Steps to Set Up the Report
1. On the main menu in the top-left corner, click the plus icon.
2. Click on Advanced Report
3. The Add Data Objects dialog appears. Add the Data Objects that are relevant to the report.

💡 The best way to identify whether a Data Object is relevant to a report is to consult the Data Dictionary.

4.Start by matching the column headings with the Data Fields in the Data Objects. Note, however, that some Data Objects may need to be added simply to provide a join path between the Data Objects whose fields are present in the report.

5. To group data, first create a Sort. Click the Sorts icon on the toolbar to open the Report Sorts dialog.
6.From the dropdown on the left, choose the Data Fields by which the data will be grouped and rank from first (outermost grouping) to last. Click Okay to close the Report Sorts dialog.
7. Place the group in the desired location of the report.



Advanced Reports: Sorts

Sorts are a prerequisite for making Groups

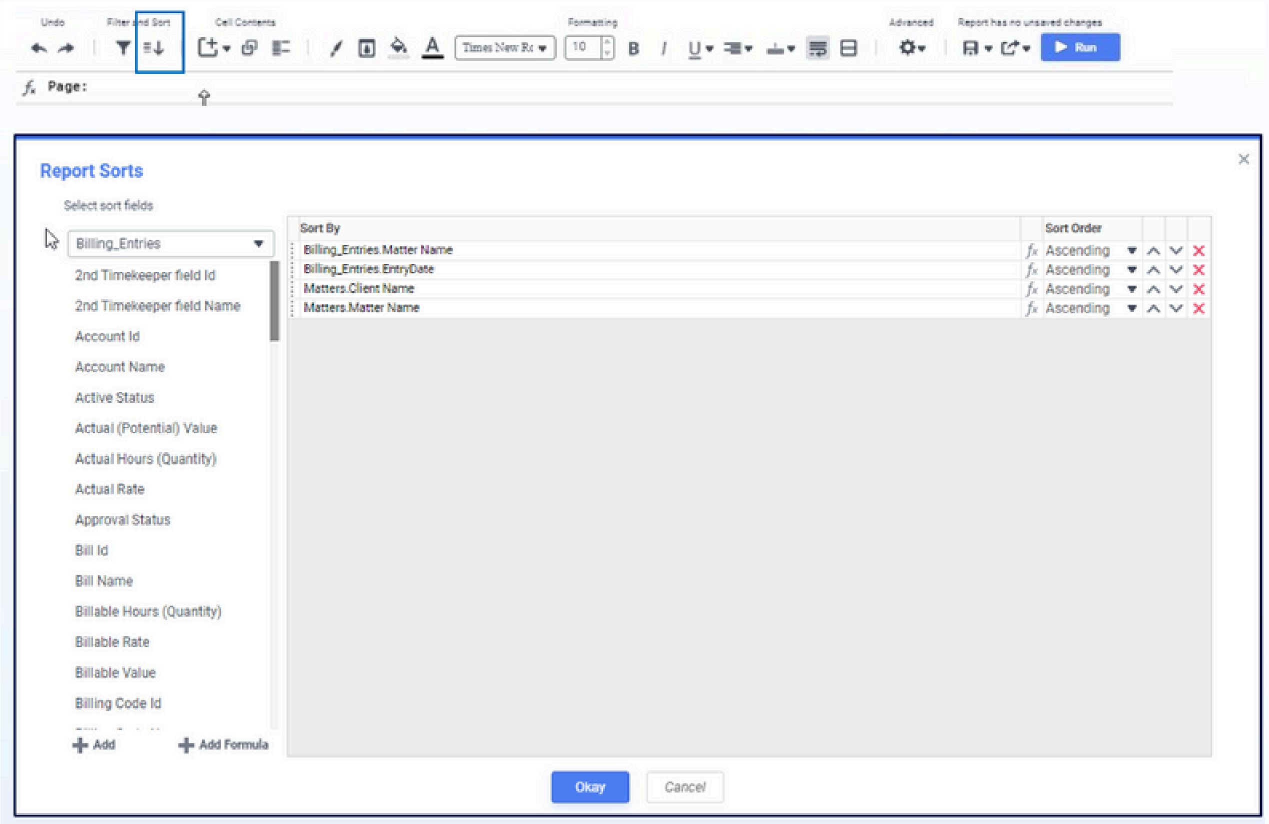
- Sorting puts data in order so that data rows which share common values for the sort field are next to each other.
- Grouping simply takes those common values, pulls them out of the rows, and makes Sections for each group of rows which share that value.

Color	Food
Blue	Laffy Taffy
Orange	Starbursts
Blue	Jolly Ranchers
Green	Airhead
Orange	Oranges

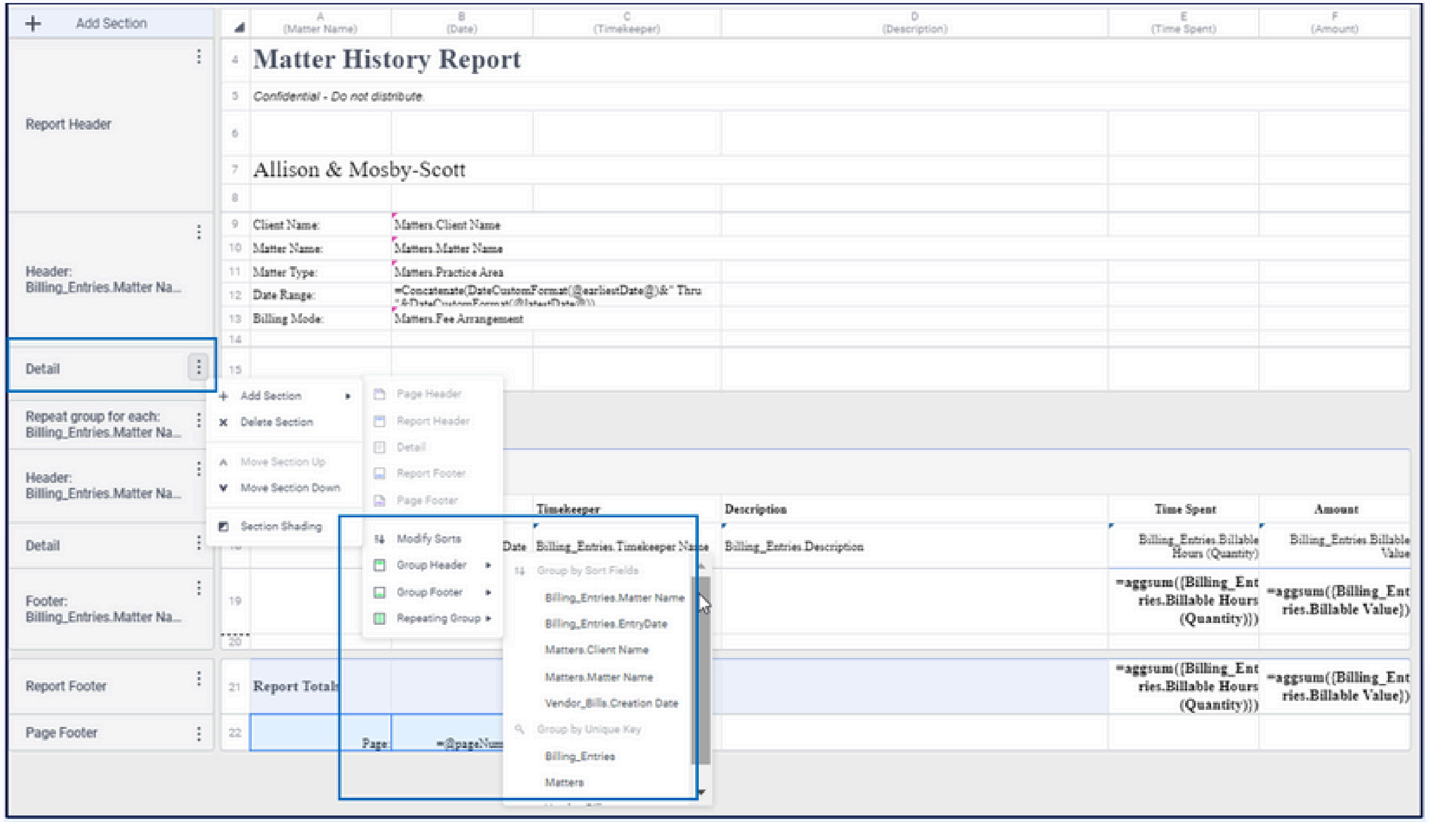
Color ↓	Food
Blue	Laffy Taffy
	Jolly Ranchers
Green	Airhead
Orange	Oranges
	Starbursts

Adding sorts:

- Set the sort precedence so that nested groups are in order of their grouping level.
- The outermost group should have the highest precedence, with the next levels following in order.

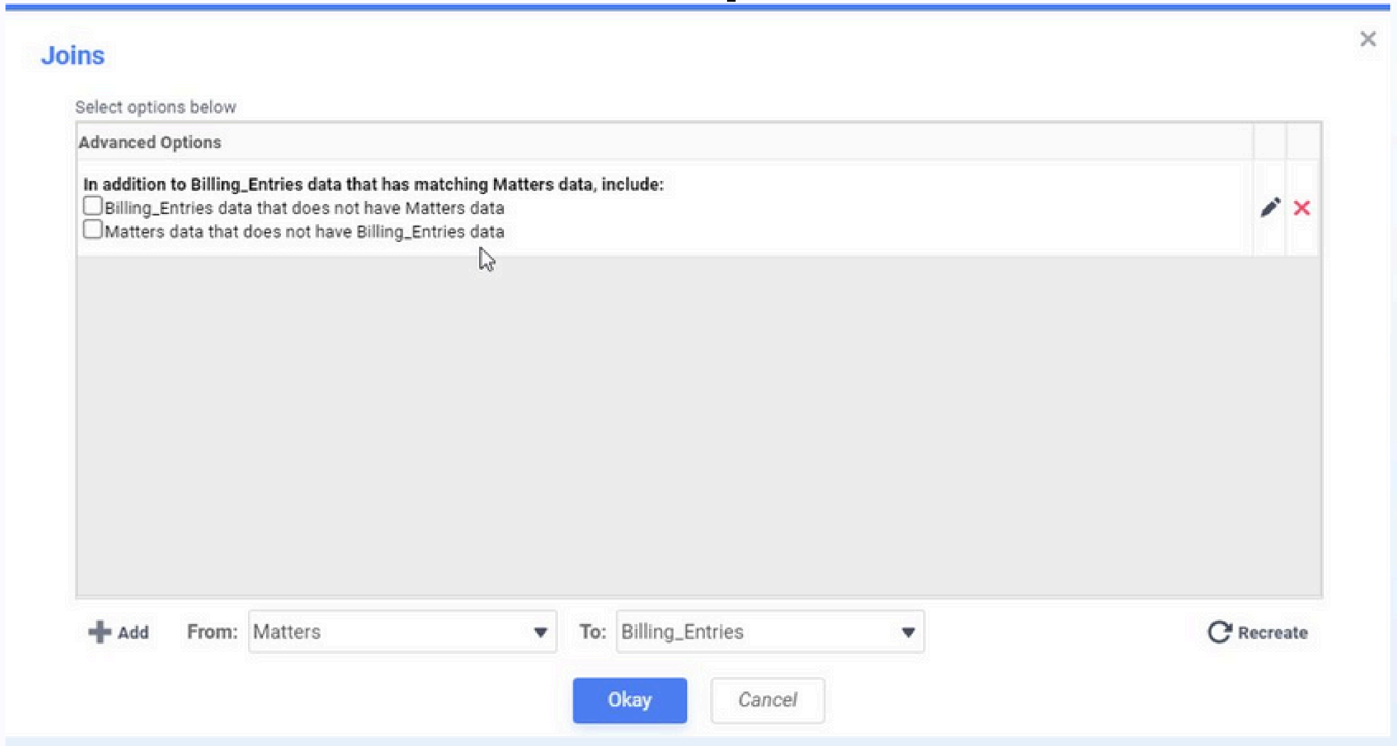


Advanced Reports: Groups



- Group Header - Typically, Group Header sections are used as labels.
- Group Footer - Typically, Group Footer sections are used to calculate subtotals.
- Repeating Groups are a way to organize and display data that contain multiple one-to-many relationships.
  - Repeating Groups can have distinct column titles.

Advanced Reports: Joins



- Check none
  - **Inner join:** Retrieves only the rows from both tables that satisfy the specified condition, excluding unmatched rows from either table.
- Check top
  - **Left join:** Retrieves all rows from the left table and the matching rows from the right table, filling in the gaps with null values for unmatched rows from the right table.
- Check bottom
  - **Right join:** Retrieves all rows from the right table and the matching rows from the left table, filling in the gaps with null values for unmatched rows from the left table.
- Check both

Outer join: Retrieves all rows from one table and the matching rows from the other table, filling in the gaps with null values for unmatched rows.

Advanced Reports: Fixing broken joins

Armed with the foundational knowledge to craft reports, take the plunge and start experimenting. Don't hesitate to revisit our knowledge base regularly, as we are committed to continually rolling out additional educational resources to further enhance your proficiency in reporting.

Happy Reporting

Centerbase