Link to article: https://discover.claromentis.com/knowledgebase/articles/739

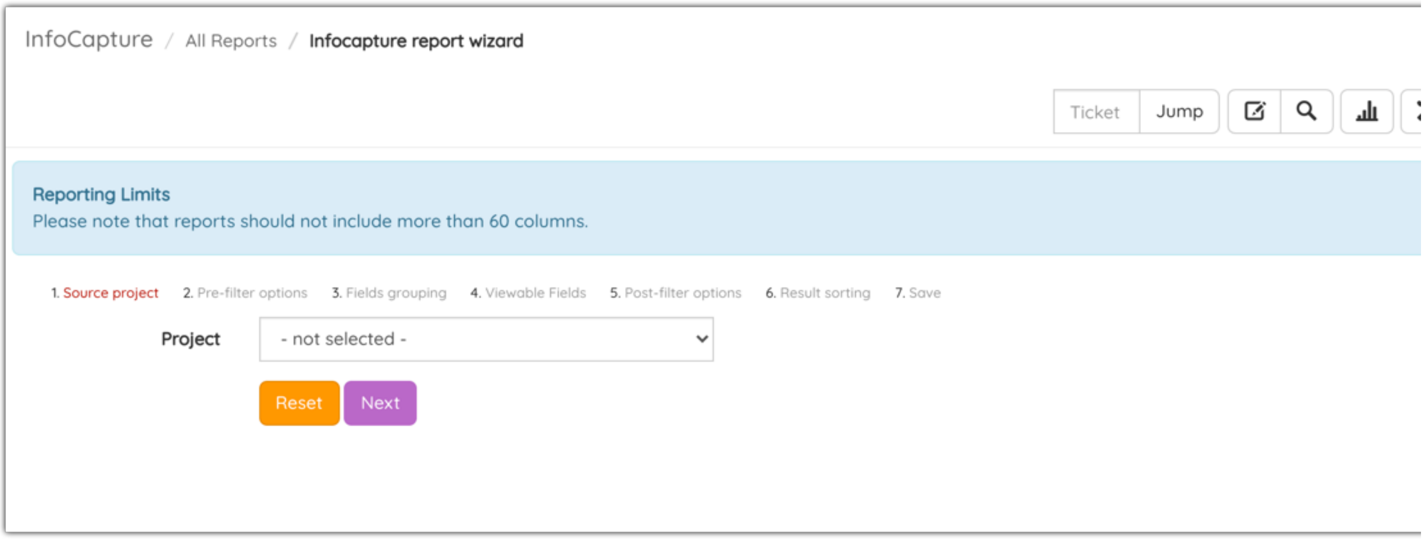
Infocapture report building

Creating a report - Start to finish

Please ensure your permissions settings are correct, this is covered here.

Firstly you will need to identify the objective of the report, in this example, we will demonstrate a few.

Step 1: Select the form you want to run a report on



Step 2: Pre-filter options

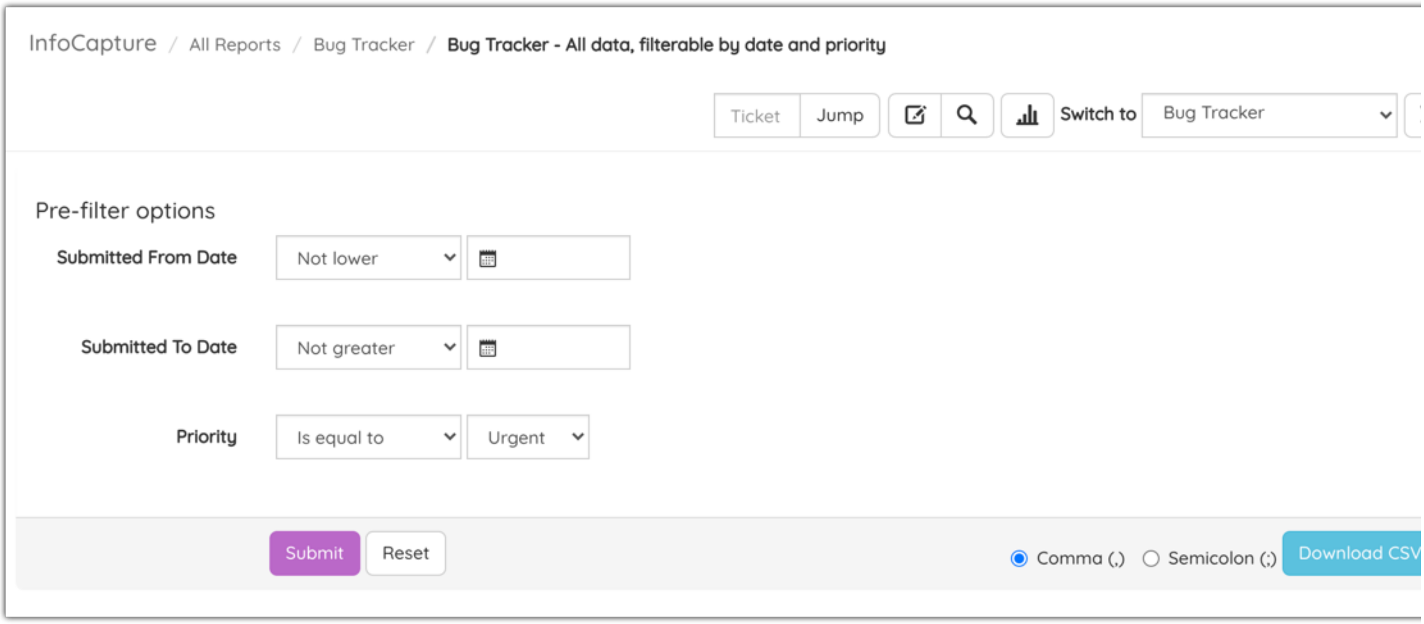
If you have a large number of tickets on a big form, pre-filters are necessary to make the data manageable, ahead of providing the data in the report it will ask you to define the filters. In this example, we will demonstrate 2 pre-filters.

1- A date range e.g. only show 'Bug tickets' submitted within a certain date range

2- Status priority - Also be able to filter by the urgency of the status

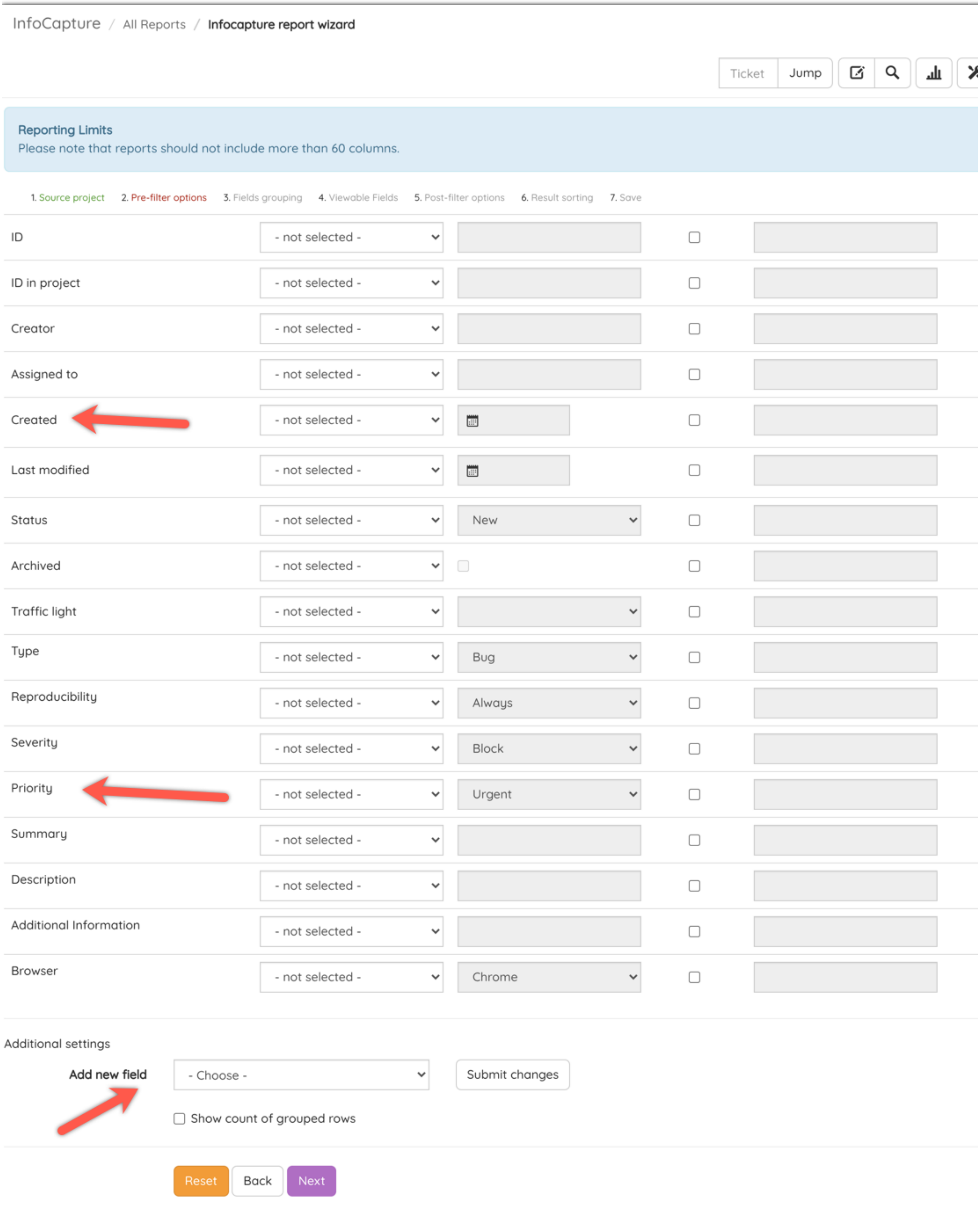
The result being *'We can see we had 5 high priority tickets submitted in the month of March'*

Here is how it will look on the front end of the report when you run it, without pre-filters, you will see all the data straight away.

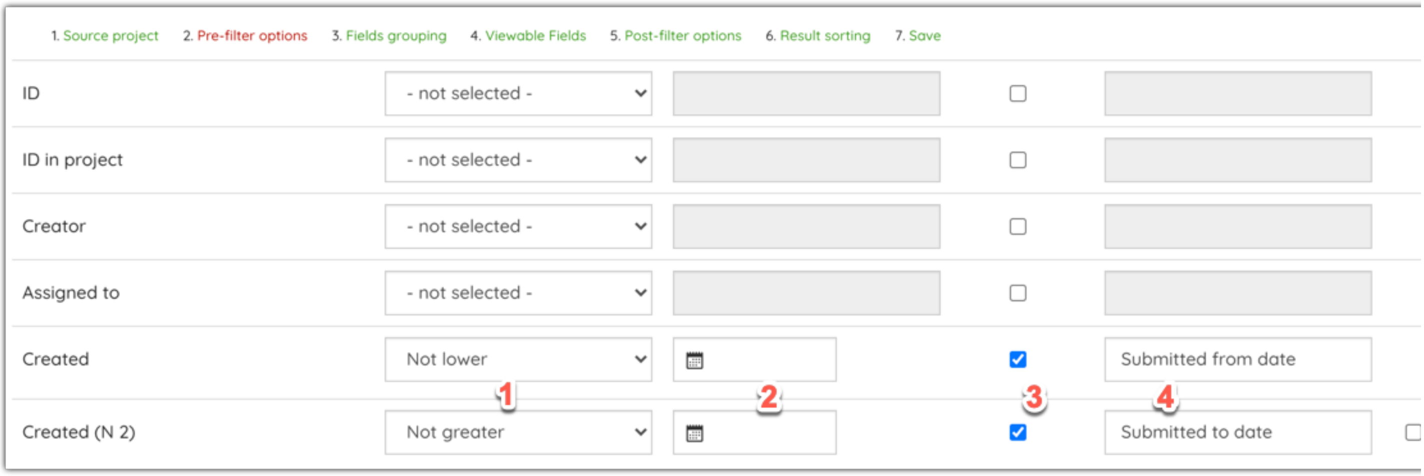


To create these settings, you will need to follow these steps:

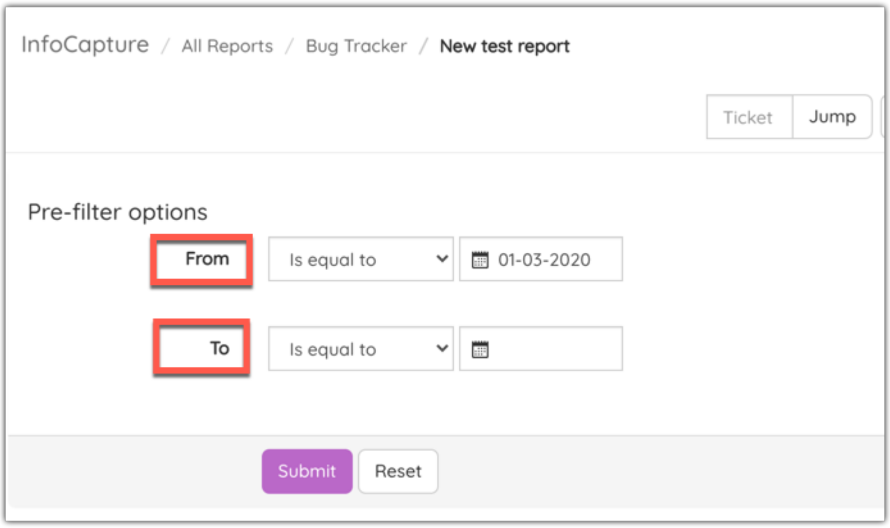
You will see at present there is just one 'Created' date field, the bottom arrow indicates where another can be added:



If you select 'Created' here and 'Submit changes' you will see a second 'Created' box appear below the current one.



1. You can leave these as -not selected- or set them whatever you choose is how the default will appear when you run the report
2. If the date range will always be the same, you can enter the dates at this point but its likely you will want to enter custom ranges each time so leave this blank
3. **Checking here is what tells the report to include this item as a pre-filter.** When you check here, the final column opens;
4. This is where you name the prefilter, eg 'From' and 'To' like so, you must name it or an error will appear



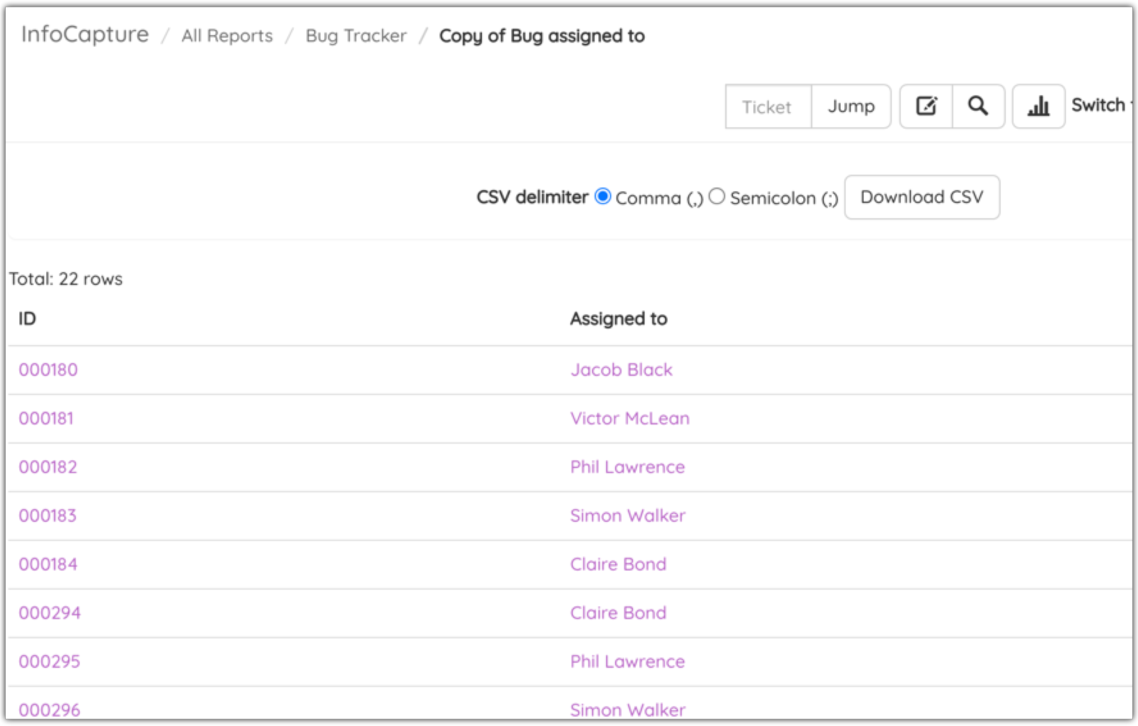
Please note! *When you click 'Run Wizard' again if you have changes to make, you will see in this section the check marks against these grouped items have been removed, you will need to re-do this every time you edit the report.*

Step 3: Field Grouping

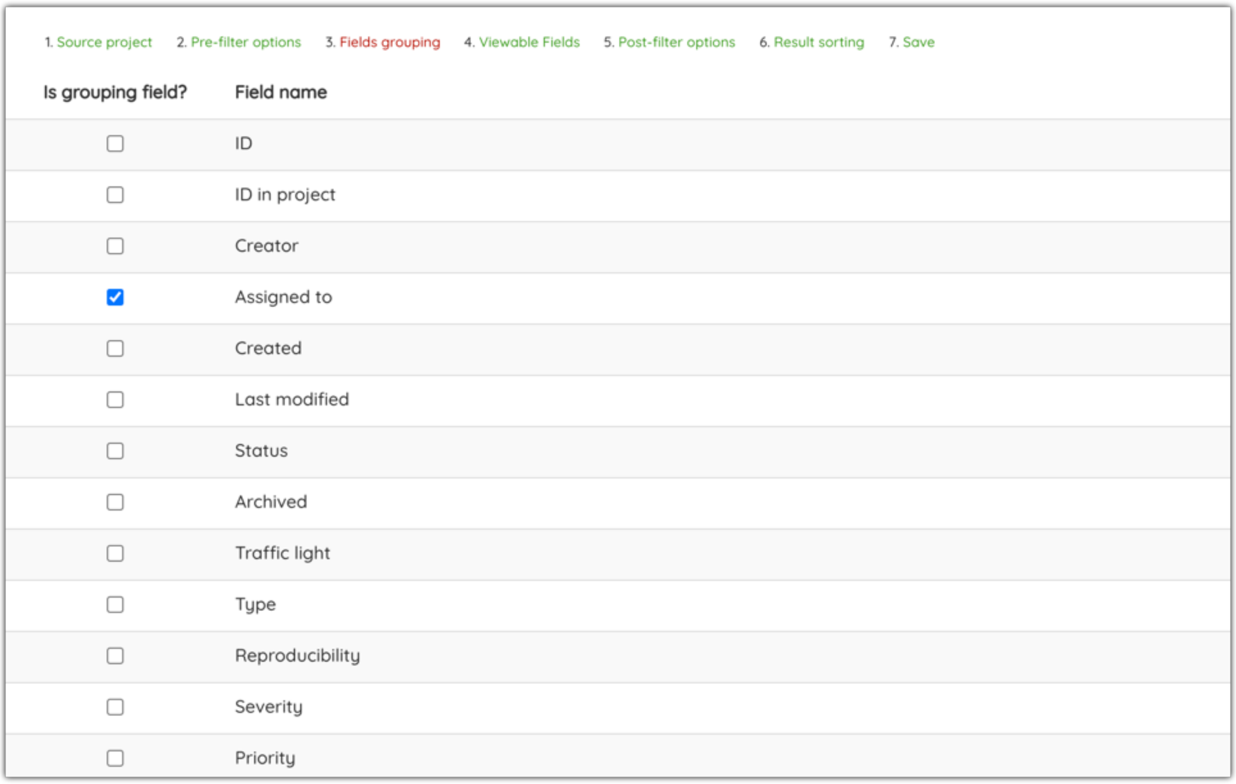
Field grouping is helpful in the following scenario:

'I want to see a list of all ticket handlers we have managing tickets'

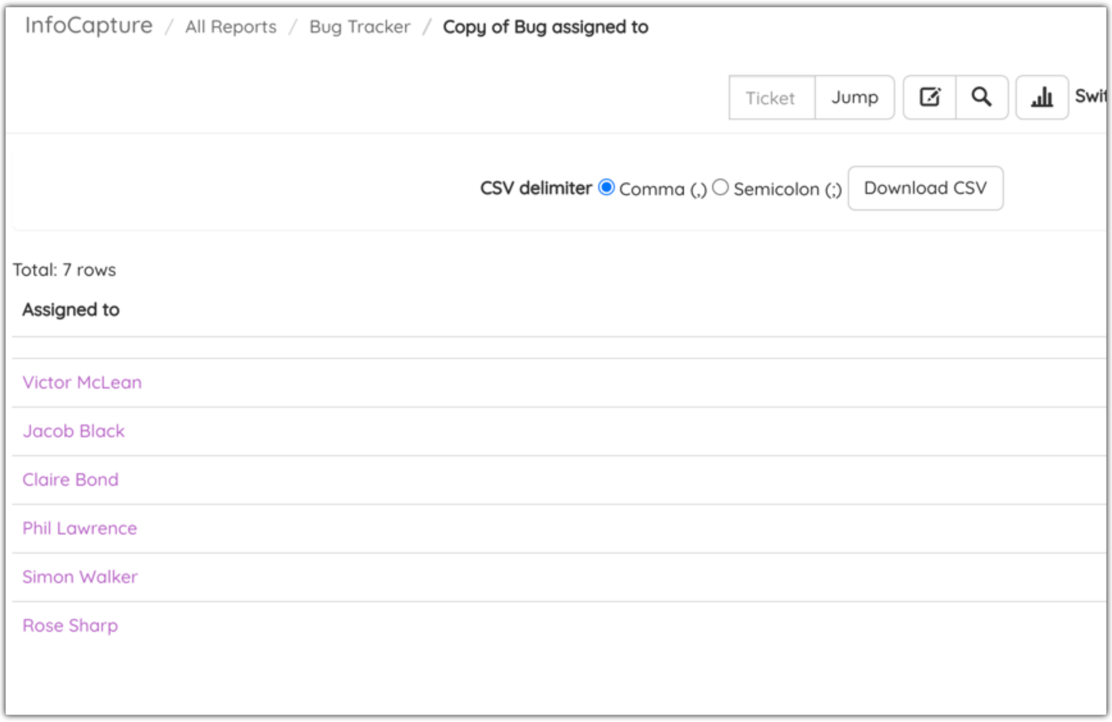
Without field grouping, this report would look something like the below image. You would need to try to count the individuals (without accidentally counting them twice from this list).



It's not particularly easy to review in this way, so if you check this field in field grouping:



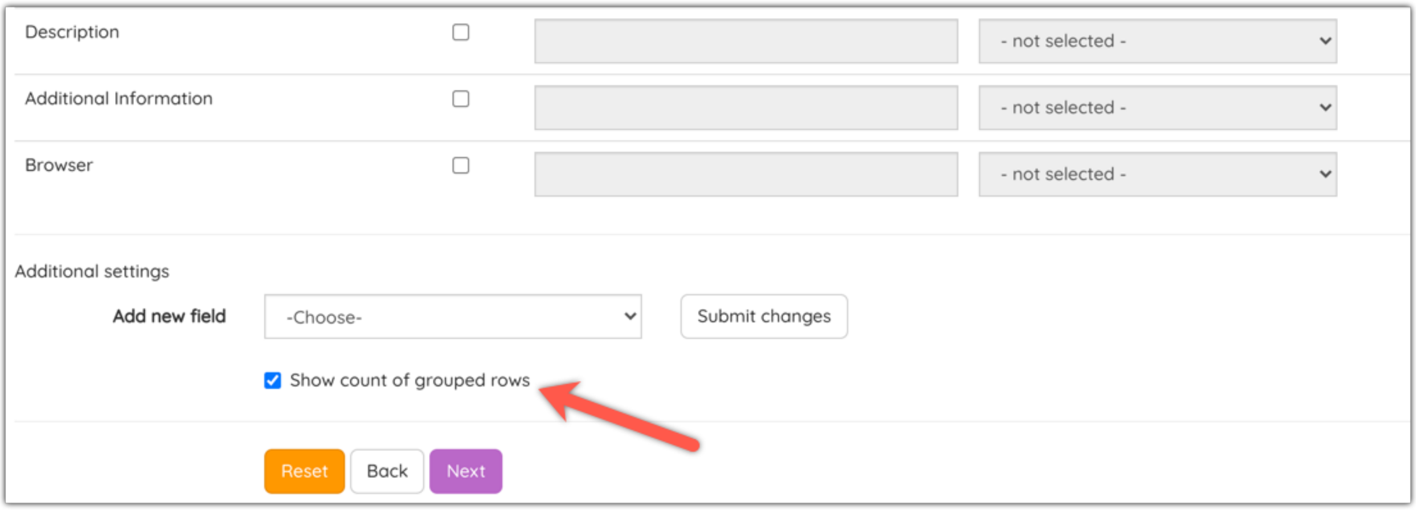
The report will then look like this:



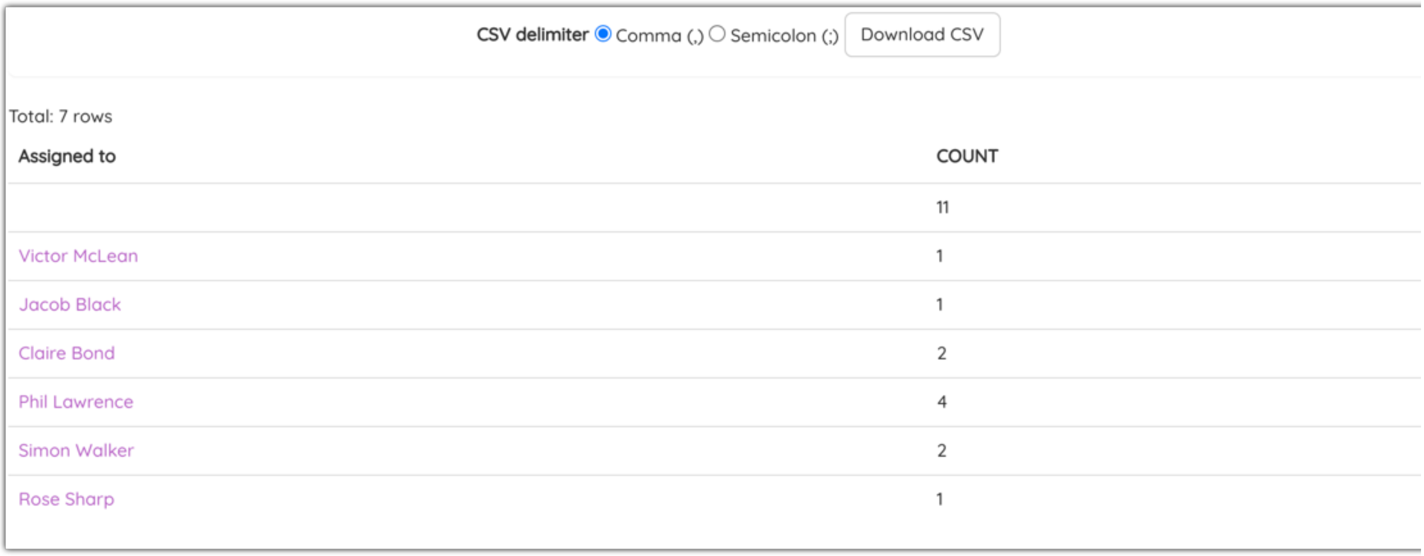
There is another nice addition that can be added here if your objective next is:

'I want to see how many tickets each of these ticket handlers are managing'

When you get to the next section 'Viewable fields' you will need to check this box at the bottom:



Checking this box will make the data display like so:



CSV delimiter Comma (,) Semicolon (;) Download CSV

Total: 7 rows

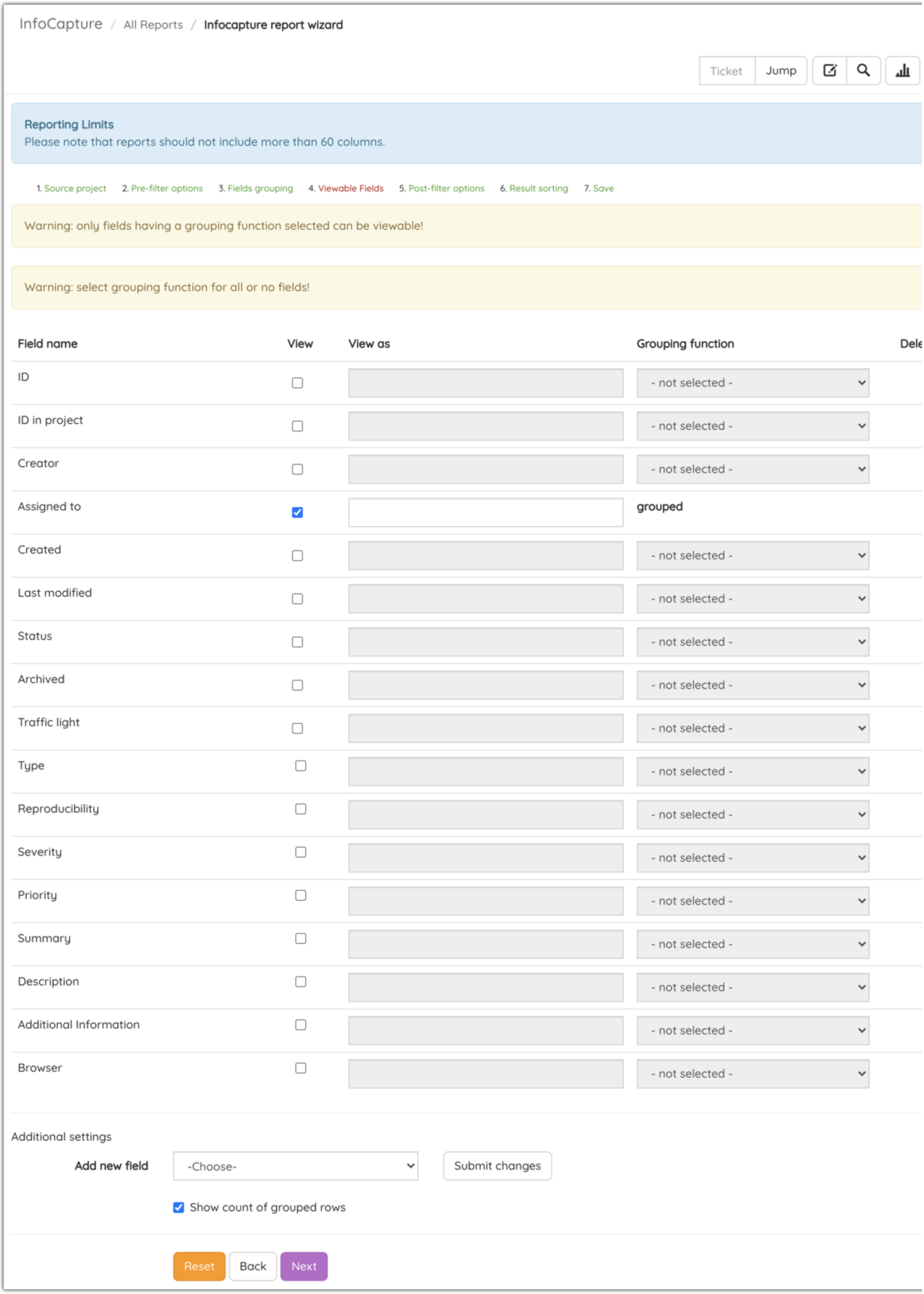
Assigned to	COUNT
	11
Victor McLean	1
Jacob Black	1
Claire Bond	2
Phil Lawrence	4
Simon Walker	2
Rose Sharp	1

Step 4: Viewable Fields

This section determines which fields in your form should be visible in the report.

> **Please note:** The report can only handle a maximum of 60 columns, please bear this in mind when choosing which fields need to be visible, the fewer you have the better performance you will have on the report.
> This is due to the current MySQL database limitation that cannot have more than 61 joins between tables.

Please also note that using field grouping means some further considerations must be given here, these are shown in yellow alert boxes:



If you haven't got any grouping in place, you can simply check the fields you would like to appear.

Once checked the middle column will activate, here you can give the column a different heading, if you leave it blank it will stay as the current field name.

Step 5: Post Filter options

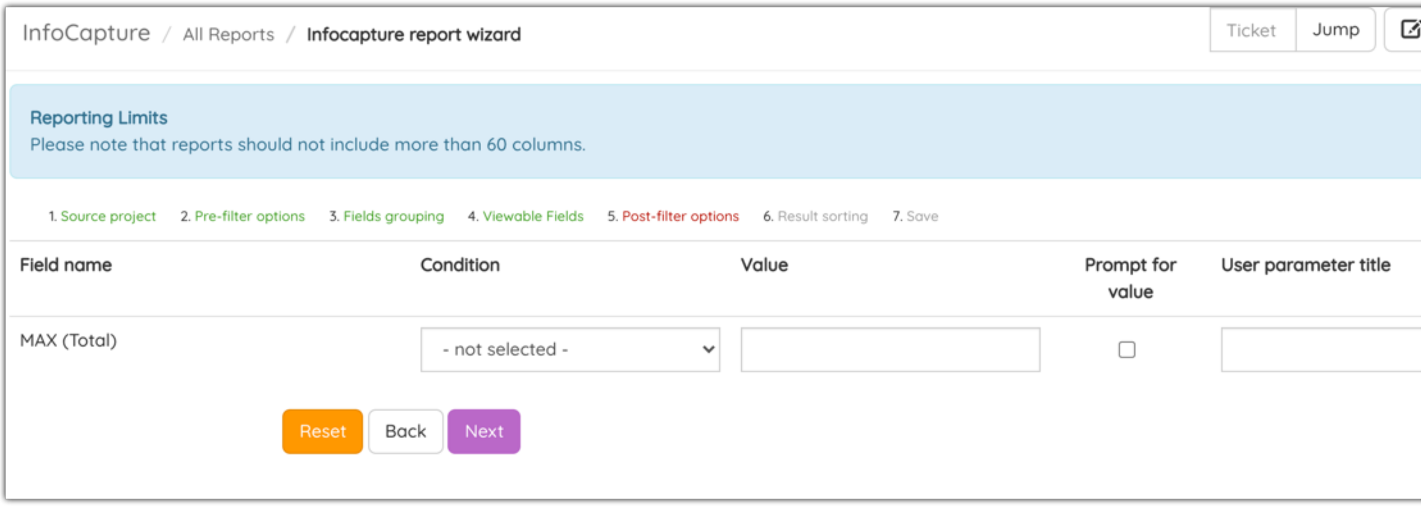
It's likely this section may not have options for you. Your choices in the previous section will determine what appears here.

Looking at the following example:

Form: Invoice request
'I want to see who managed the highest value invoice this year'

If you take a step back to the previous section, 'Viewable fields' you can see here we have grouped the field 'Assigned to' and lower down the page we also have said we want the 'Total' field to be visible, when we select this, we get the choice to select something about this field, whether it should show the 'MAX' or 'MIN' value.

If this is configured for a field in the 'Viewable fields' section it will appear in the 'Post-filer' section like so:



It is up to you if you would like to further configure the following:

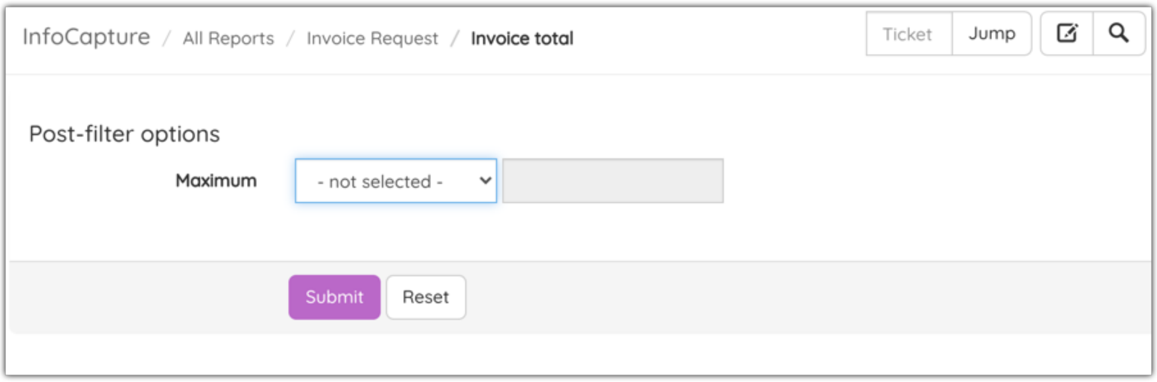
Condition: specify further details about this field (e.g. contains, is greater than, is less than)

Value: For the above condition

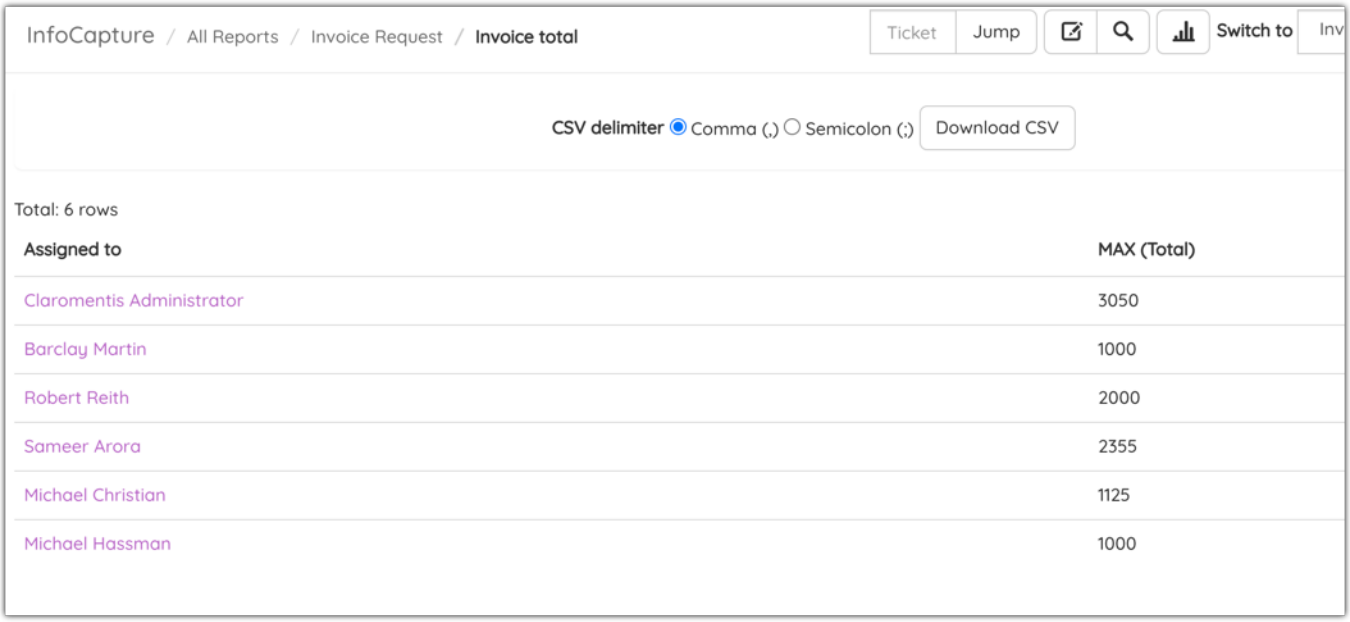
Prompt for Value: If this is checked, the two above options will appear on the report, asking you to configure the data ahead of showing the results. If you don't check this, the report will still run the prefilter, with whatever you have entered here at this point.

User parameter value: Give the pre-filter a different name (currently it would be MAX (Total))

Here is how the report looks when 'Prompt for value' is ticked:



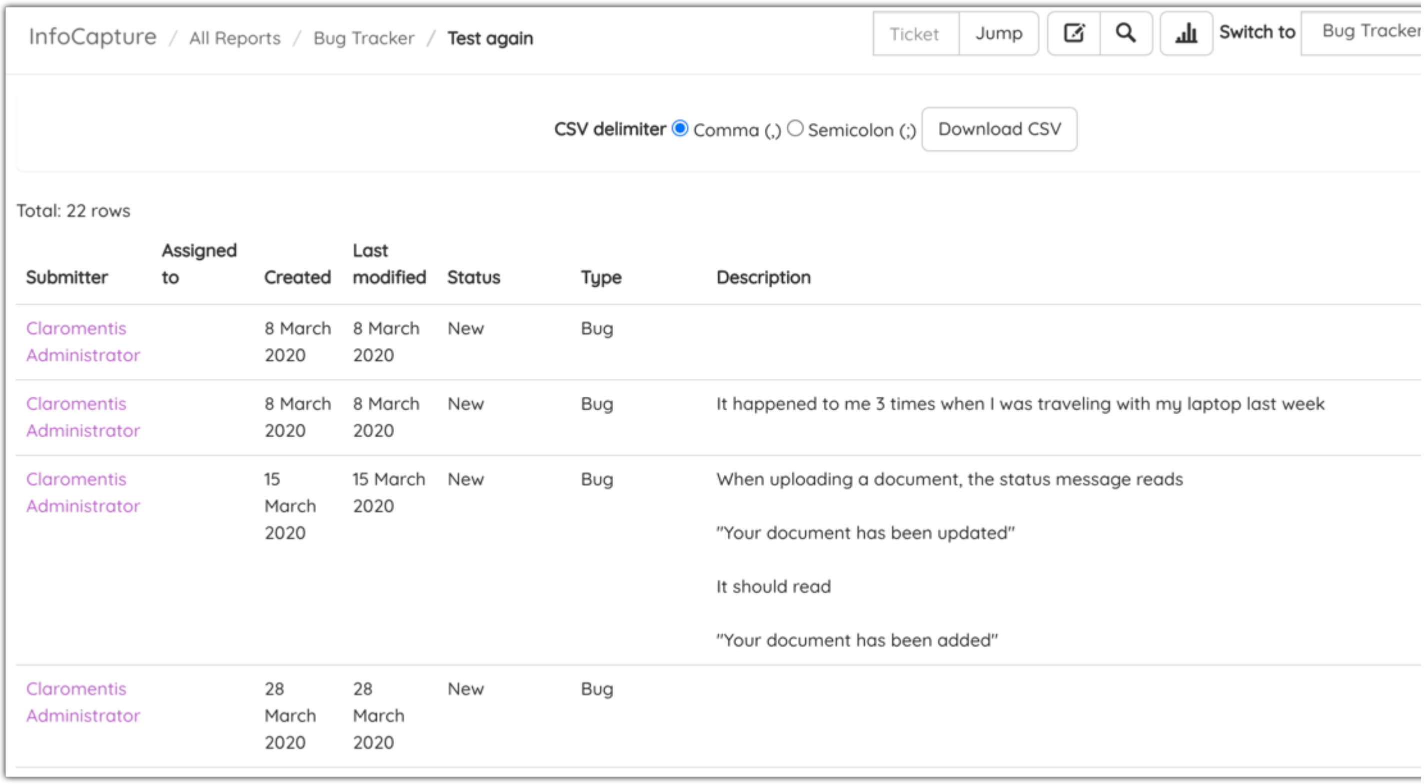
Here is how it will look without 'Prompt for value' ticked, of all the tickets the ticket handlers managed, this report will show the one with the highest value next to the ticket handlers name.



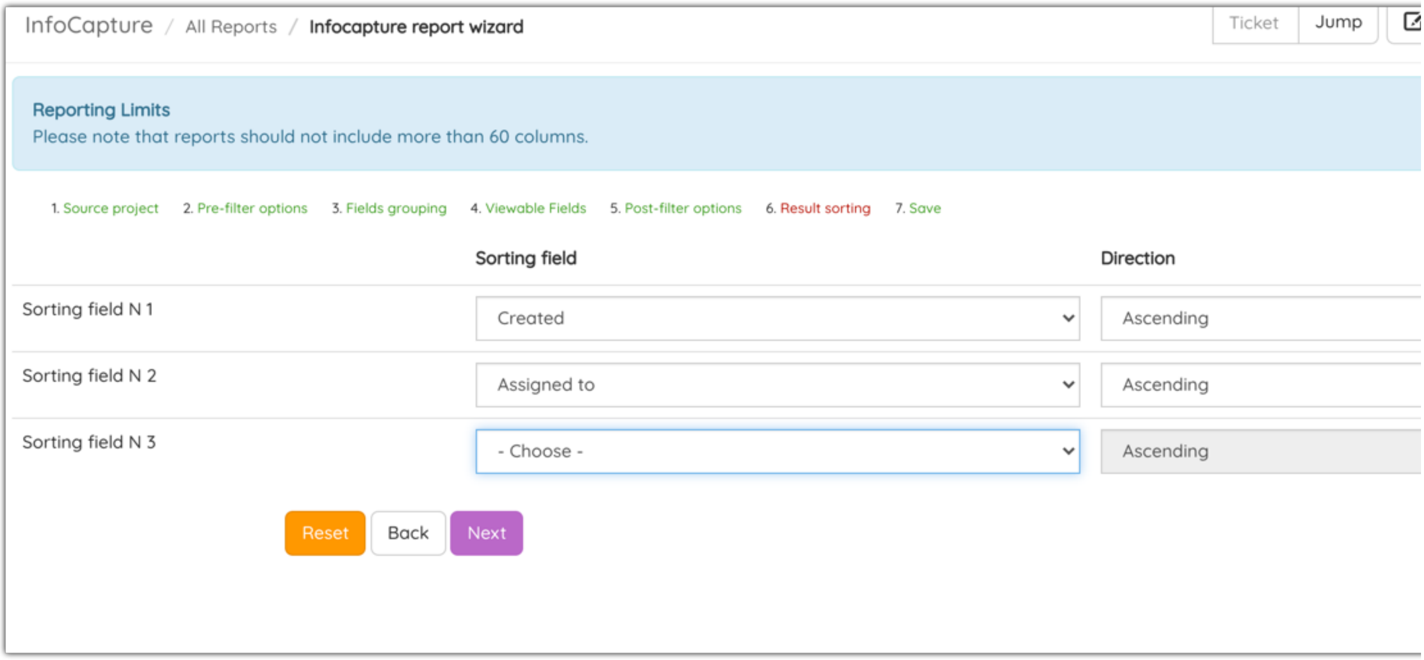
Step 6: Results sorting

Results sorting determines what way the data is organised, you can choose from three options, the top one will take priority.

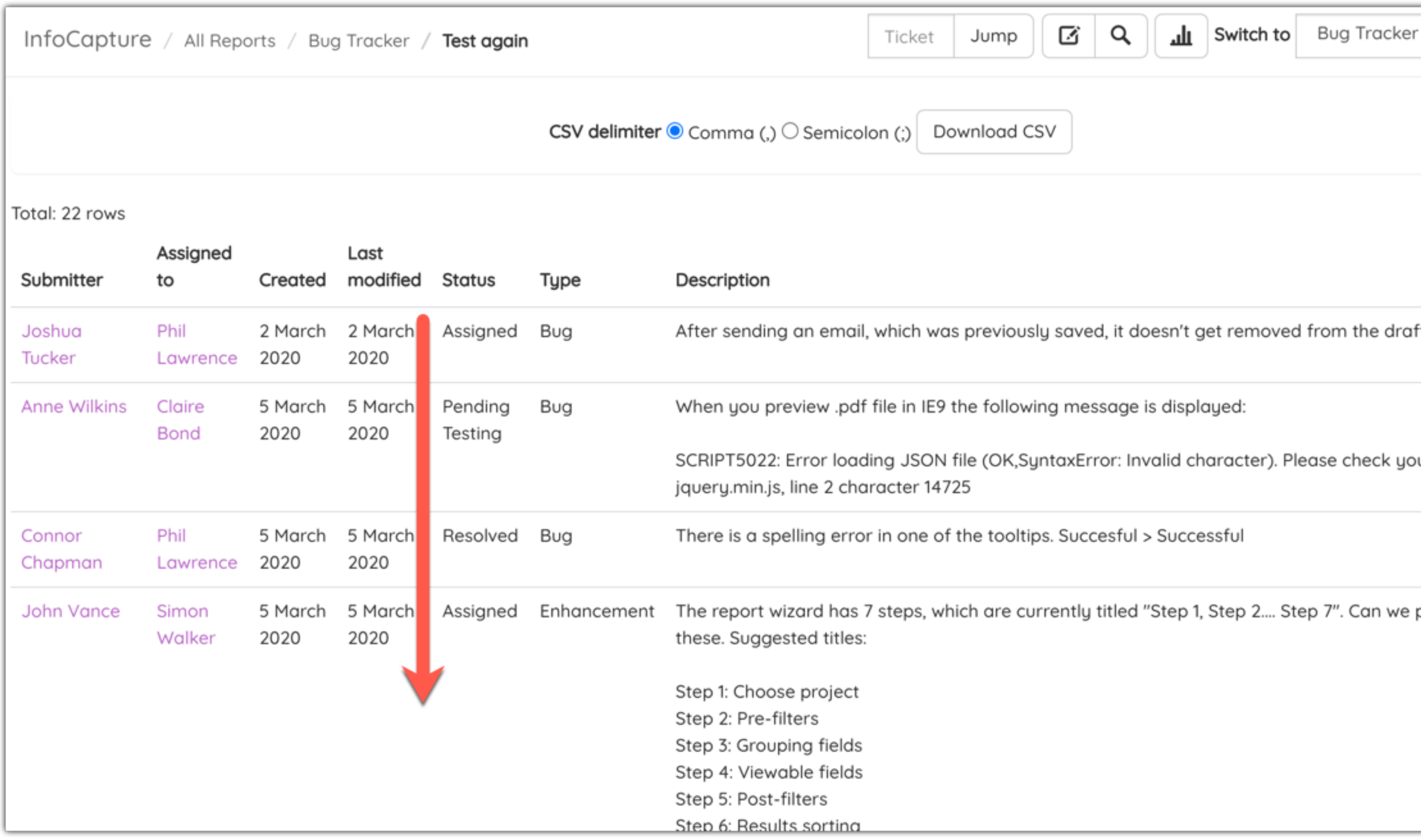
Here is an example of how my data looks now:



If I then configure it with the following guidance:



You can see that the dates are now in chronological order:



Step 7: Save

Once you have reached the final step and click save, you will then be able to title your report. It will then populate in your list of reports. You will be able to rename, edit, duplicate and delete the report at any time.

Hopefully, this guide proves helpful in getting to grips with producing reports! There are many options and possibilities to test and try. Please remember the size limitations for reports as 60 columns, try to use pre-filters to manage large amounts of data.

Created on 1 July 2020 by Hannah Door. Last modified on 28 June 2023
Tags: infocapture, reports, forms