IFW QUICK REFERENCE GUIDE: REPORTS

To access the reporting function, point to the **Reports** menu at the IFW Control Center.

There are two main components to every IFW report:

- Report Templates/Summary Styles – The way the data is formatted
- Named Report Settings – The search criteria

Creating a Summary Style

To access the Design Summary Styles dialog box, follow these steps:

1) From the **IFW Control Center**, point to the **Reports** menu and select **Summary Styles**.
2) The Design Summary Styles dialog box will appear.

There are two steps in the creation of a Summary Style:

1) Specifying the summary style information
2) Defining the column layout.

After the summary style and column layouts have been named and configured, click the **Create** button. This:

- Saves the summary style design
- Places the design in the appropriate folder in the Select Reports tree
- Creates an association between the summary style file name and the column layout file name.

To display the report on your screen, click the **Preview** button.

Defining Summary Styles

At the Summary Styles Information screen, enter the following information:

Summary Style Name – This name will appear in the **Summary Styles** list box in the Design Summary Styles dialog box, and in the Select Reports tree after you define the column layout and click the **Create** button.

Reporting Type – Select the type of data that will form the basis of the report. The reporting type selected will determine in which folder the summary style will appear in the Select Reports tree and the summary fields available in the Define Column Layouts screen.

Description – Provide a description of the report.

Orientation – Select an option button to specify if the report will be generated in a portrait or landscape format.

Report Title and Subtitle – Type a title and subtitle for the report in each text box.

Section Comment – Enter a comment that will appear in each section of the report.

After all the necessary information has been provided, click the **Continue** button to save the information and return to the Design Summary Styles dialog box to define the column layouts.

Defining Column Layouts

At the Define Column Layouts screen, perform the following to define the placement of columns, determine which columns are included in the report, and provide a column header for the selected fields:

Column Layout Design Name – In this text box, give the column configuration a name. This name will appear in the **Define Column Layout** list box in the Design Summary Style dialog box.

Summary Fields – From the column of option buttons, select the type of summary fields you want to appear in the report. After you make a selection, fields for the chosen type will appear in the adjacent list box.

Column Numbers – To determine the placement of each field in the report, follow these steps:

1) After selecting a field from the list box, click on a column number.
2) Next, click the **Insert Summary Field Into Grid** button, and repeat for each field that is to appear in the report.

Column Layout Grid – The Column Layout grid displays how the summary field will appear in the report and its column number.

Once a field is placed in the grid, you can give its column a name by clicking in the adjoining **Column Header** cell and typing in the desired column header.

If you wish to change the name of the **Report Field**, click in the adjoining cell and enter a new name.

In the **Summary Type** cell, click in the cell, and from the list box select either Sum or Average.

CREATING A NAMED REPORT SETTING

Named report settings are created at the Report Parameters screen. To access this screen, follow these steps:

1) From the **IFW Control Center**, point to the **Reports** menu and select **General Reports**.
2) Next, select the desired category and open the folder to the desired sub-category.
3) Select the template or summary style in the sub-category.
4) Right click and select **Create Named Setting** from the pop-up menu.
5) The Save Report Parameters dialog box will appear. Enter a name for this report.
6) Click **Save** to proceed, and you will return to the Select Reports screen. Here, the new report name will be listed.
7) Select the new report and then click on the **Continue** button.

The Report Parameters screen will appear. When it does, select the Basic or Advanced tab to create a named report setting.

Basic Tab

The Basic tab is the main screen for defining search parameters and scheduling specifications for your reports.

Date Range

- A **specific date** specifies that the report will contain call records that include a specific date, fall within a range of dates, or that occur before or after a specified date.
- A **relative date** specifies that the report will contain call records that occur within a time frame that will shift depending on the date the report is generated.
- Exclude call record data from Saturdays and Sundays by selecting the **Exclude Weekends** check box.

Time Range

All of the time text boxes allow for either 24-hour (military) time or non-military time.

Continuous – This will query for call record data during the entire 24-hour period for the number of days specified in the Date Range section.

Interval – This option will query for call record data during the specified period of time for the days specified in the Date Range section. **Start** and **End Time** text boxes appear when this is selected.

Other Range – This option will query for call record data starting from the time specified on the first date in the date range to the ending time specified on the last date in the date range. **Start Time on First Day** and **End Time on Last Day** text boxes will appear when this is selected.

Filter Grid

The Filter grid is used to include only those records that match specific search criteria in the report.

- The left column displays field names available for the type of report chosen from the Select Reports screen.
- The middle column displays the operator chosen to filter search criteria for each field name.
- The right column displays the search criteria specified in its search dialog box for the field name.

When you double click on a row in the filter grid, a Select Field Name dialog box appears. A list of operators that are available in the Select Field Name dialog box follows:

Includes – Specifies to search for just the value or values entered for the field name selected.

Doesn't Include – Searches for all values except those entered for the field name selected.

=> – Sets the low point and searches for all values equal to or greater than the value entered.

<= – Sets the high point and searches for all values equal to or less than the value entered.

Like – This filter is used for alphanumeric queries and acts as a wildcard to search for all values beginning with the search string.

Advanced Tab

The Advanced tab contains items that are either report specific (i.e., the item is available based on the summary style or report template selected at the Select Reports screen), or less frequently used.

The left side of this tab contains controls that let you specify:

- Where to set a page break
- How to sort fields
- Add headers and comments
- How to distribute the report

The right side of this tab contains check boxes letting you include or exclude information. The type of report selected determines the check boxes available.

Editing a Named Report Setting

You can always edit a named report setting by double-clicking on its symbol in the Select Reports screen, making the changes at the Report Parameters screen and clicking the **Save** button.

Deleting a Named Report Setting

To delete a named report setting, select it in the Select Reports screen, right click and select **Delete Named Settings** from the pop-up menu.

SCHEDULING A REPORT

Clicking the **Schedule This Report** button first opens a Save Report Parameters dialog box. This box lets you save the parameters before moving on to the actual scheduling of the report. Once the parameters have been saved, the Report Scheduler dialog box will appear.

Creating a New Schedule

At the top of the Report Scheduler dialog box, specify the computer that will run the report, and select the **Active** check box so that the report will automatically run on schedule. If the check box is left blank, then the report will not run automatically. The **Last Accessed** box displays the last day the reporting computer was last accessed and is not editable.

Below these controls are the **Specific Date and Time** and **Regularly Scheduled** option buttons. Depending on which button is selected, the report will either be generated on one specific day and time, or the report will be generated automatically at every specified time period.

Scheduling a Specific Date and Time

This option is the default selection when the Report Scheduler dialog box appears.

Please note: when you schedule a report to be generated at a specific date and time, it will run only once.

To schedule a report to run at a specific date and time, follow these steps:

1) Select the **Specific Date and Time** option button.
   - In the **Run This Report On** text box, enter the date, or use the pop-up calendar.
   - The date the report will be generated will appear in the text box.
2) In the adjoining text box, enter the time you want the report to be created. Enter the time as military time (24-hour) or non-military time.
3) To save this schedule, click the **Save** button and a Scheduled Reports screen will appear. This screen displays the Schedule ID, the start time, and when the report will run. If this information is correct, click the **Close** button. If you need to make a change, select the Schedule ID and click the **Edit** button and you will return to the Report Scheduler screen. Make the change and click the **Save** button.

Defining a Regularly Scheduled Report

When this option is chosen, you can schedule a report to be generated on a regular basis. For example, you can have a report run on a certain day of the month, or a certain day of the week, on a specified day or days, or every number of hours or minutes.

Scheduling by Month

- If you click the **Monthly** option button, you have two choices:

1) You can specify the date of the month that the report will be generated. Click the **Day** option button and type the day of the month in the text box.
2) If you select the **Of the Month** option button, choose the First, Second, Third, Fourth, or Last setting in the first list box, and select a day of the week from the second list box.

Scheduling by Week – Click the **Week** option button, and select the day you want the export to run.

Scheduling by Day – Click the **Day** option button, and click the day(s) you want to generate a report.

Scheduling by Hour – Click the **Hour** option button, and enter the number of hours to wait before a new report is generated.

Scheduling by Minute – Click the **Minute** option button, and enter the number of minutes to wait before a new report is generated.

When you define a regularly scheduled report, **you must** specify a Start Report date and time. This is done in the lower right-hand corner of the screen. To do this, follow these steps:

1) Select the **Regularly Scheduled** option button.
2) Select one of the scheduling option buttons, and the **Start Report At** text boxes will appear.
3) In the **Date** text box, enter the date, or use the pop-up calendar.
4) In the **Time** text box, enter the time you want the report to be generated. You may enter the time as military time (24-hour) or non-military time.

Editing a Schedule

To edit a previously created schedule, follow these steps:

1) At the Select Reports screen, double click the desired Report Setting, and the Reports Parameters screen will appear.
2) Click the **Schedule This Report** button, and the Save Report Parameters dialog box will appear.
3) Click the **Save** button.
4) At the Scheduled Reports screen, highlight the Schedule ID and click the **Edit** button.
5) At the Report Scheduler screen, make all the necessary changes and click the **Save** button.
6) Click **Close** at the Scheduled Reports screen.

Deleting a Schedule

To delete a previously created schedule, follow these steps:

1) At the Select Reports screen, double click the desired Report Setting, and the Reports Parameters screen will appear.
2) Click the **Schedule this Report** button, and the Save Report Parameters dialog box will appear.
3) Click the **Save** button.
4) At the Scheduled Reports screen, highlight the Schedule ID and click the **Delete** button.
5) A dialog box will ask you to confirm the delete, and click **Yes**.
6) Click **Close** at the Scheduled Reports screen.

VIEWING REPORTS

If you wish to preview a report as you are composing it, click the **Preview** button at the Design Summary Styles screen or the Report Parameters screen. The report will then display on your screen. In the upper left corner of this screen are buttons that allow you to page through the report in either direction, or to move to the last or back to the first page.

Between the paging buttons, you see 1 of 1+, which tells you that this is the first of more than one page. To learn the total number of pages, click the end button. After you have been to the last page of the report, the page status will read 1 of 4, for example. Other buttons in this area allow you to send this report to your default printer or to send it via e-mail.

If you wish to view a previously created report, access the Select Reports screen, open the appropriate category folder, and select the Named Report Setting for the report. When the Report Parameter screen appears, click the **Preview** button.

DATABASE LISTINGS

Each of the IFW databases lets you generate one or more fixed-format listings of its contents. The type of list available is specific to each database, and can be viewed on your screen, sent to a printer, or saved to a file. To create a quick printout of any database, follow these steps:

1) Open the **IFW Control Center**.
2) Point to the **Databases** menu, and select the desired database.
3) When the database screen appears, click the **File** menu and select the listing you want to print.
4) The listing will display on your screen.
5) To print the report, click the **File** menu and select **Send to Printer**. A dialog box will appear letting you define a printer and other print specifications.
6) To save the report to a file, click the File menu and select **Save as HTML**. A directory dialog box will appear letting you specify where to save the file.

Please note: you cannot perform both of these actions with a single listing. If you need the listing as both a printout and file, you must re-run the listing.