CPDOnline

Report Manager

Specifically designed for CUNA

Credit Union National Association

Objectives

This course teaches how to effectively use Report Manager.

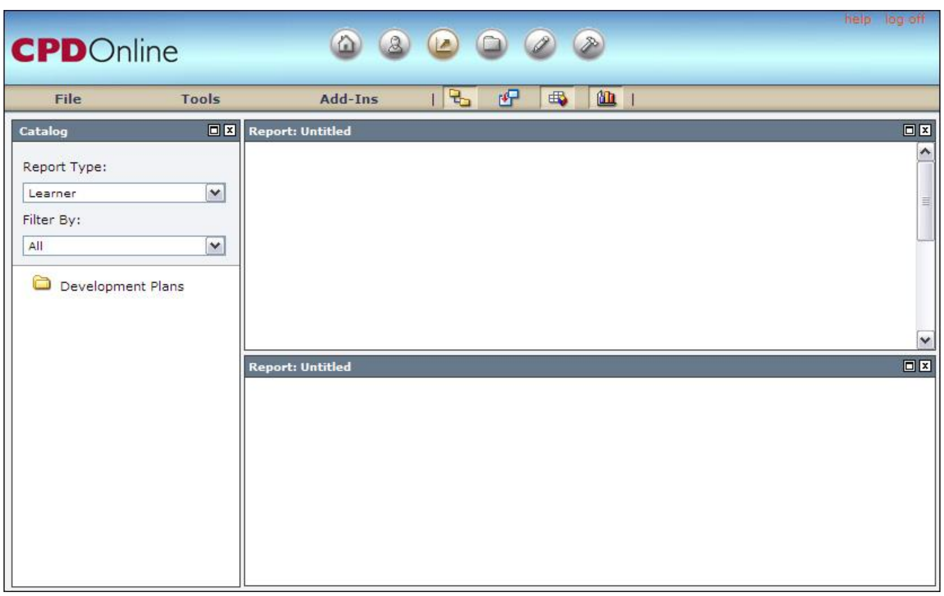
- ✓ Introduction To Report Manager
- ✓ Arranging Reports
- ✓ Simple Report Manipulation
- ✓ Create a New Report Using an Existing Report
- ✓ Create a New Report From Scratch
- ✓ Delete Reports
- ✓ Charting Data
- ✓ Sharing Report Data
- ✓ Administering Report Manager
- ✓ Resources: Documentation, Tutorial, and Online Help

Introduction to Report Manager

Explore the User Interface

Let's look at the Report Manager interface to become familiar with the components.

1. Log in to the learning management system (LMS) using your Credit Union Administrator password.
2. Click the Report Manager Mode icon at the top of your screen.
3. The Report Manager tutorial automatically opens. For now, close it.



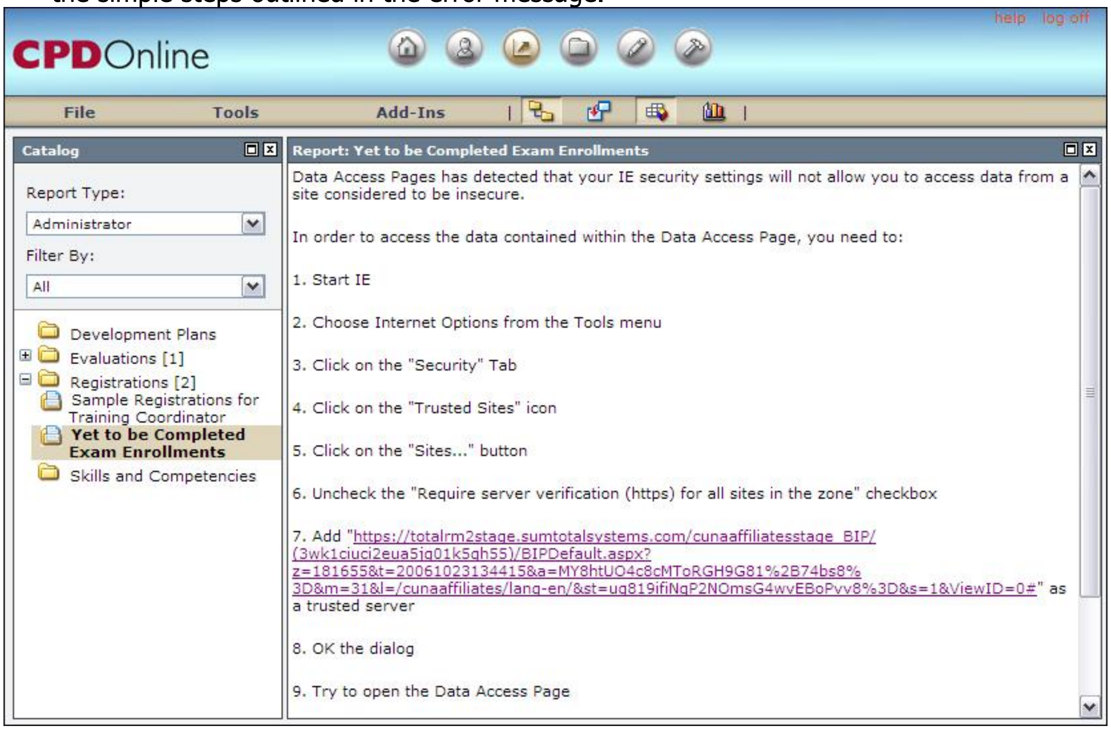
Run Existing Report

The Report Manager screen has three areas. At the far left is the Catalog area. At the far right is the Report Area where the reports can be views as text and numbers and/or graphically. Across the top is the beige Menu bar.

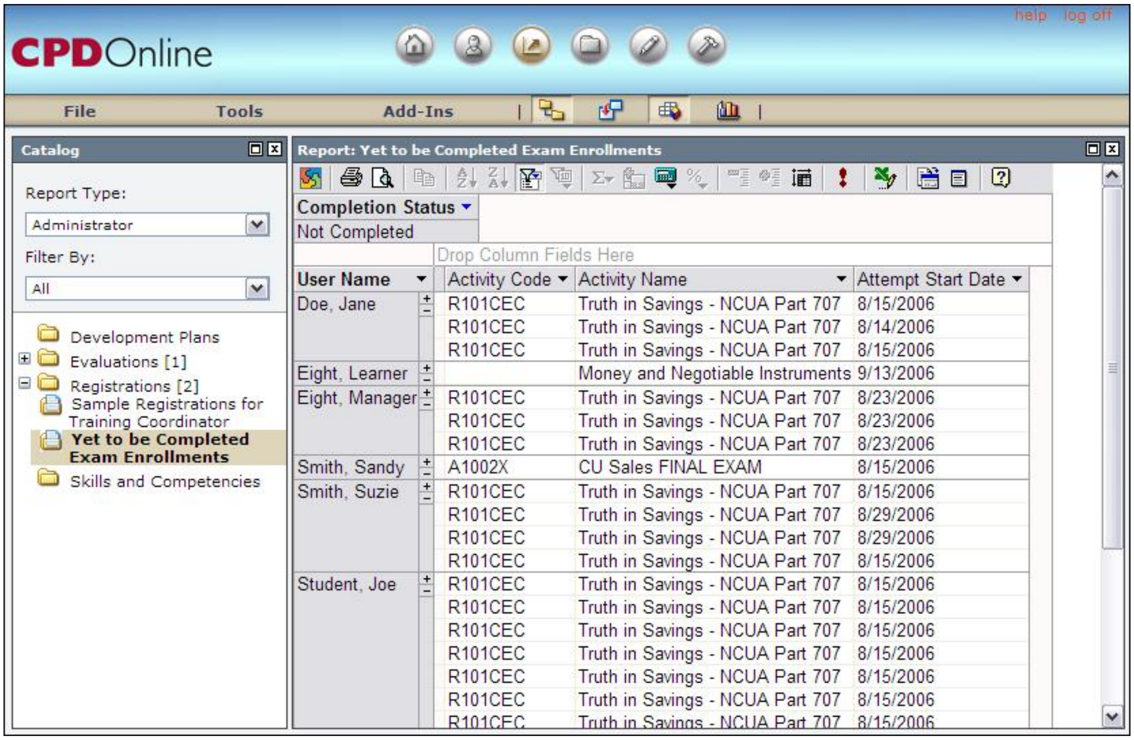
1. Under Report Type, choose Administrator.

2. Click the plus sign next to the Registrations folder then choose Yet to be Completed Exam Enrollments report.

HINT You may see this message. This simply means that the browser must be set up to accept data to pass freely from the server to the local machine. This message will appear the very first time a machine is used to access Report Manager. If this message appears, follow the simple steps outlined in the error message.



3. The report appears.



Catalog Area

The Catalog area displays the Report Type, Filter By, and Folders. Report types categories items. Report type drives the set of folders and therefore the reports available. Although any report may be placed under any report type, reports should be placed in the report type that makes most sense.

The Filter By drop down list box controls what the reports are viewed below – all, public only, private only, or by name (which allows for a search for words contained in the report name).

The folders further categorize the reports.

Report Area

Half of the Report Area (by default the top half) will display the text and numbers related to the report. The other half of the Report Area (by default the lower half) can display the report graphically such as by bar chart or pie chart. The report may be manipulated in either area; a change in one area is reflected automatically in the other.

Top Menu Bar

The top menu bar is used to perform tasks such as saving the report, importing reports, or set preferences. We'll go into more detail later.

Also on the top menu bar are icons that control how Report Manager is displayed.

Shows or hides the Catalog area of Report Manager.
Shows or hides an Add-In area of Report Manager.
Shows or hides the text and numbers area of the report.
Shows or hides the graphical area of the report.

HINT What is in focus (clicked on) or selected in the report area makes buttons on the toolbar enabled or disabled.

Below is each icon with a function description.

About – displays information about Microsoft Office Web Component (OWC) including version installed.
Print – prints the report.
Print Preview – allows a preview of the report before printing (using Microsoft Excel).
Copy – allows you to copy a set of reports.
Sort Ascending – sorts records in an ascending (A to Z) order.
Sort Descending – sorts records in a descending (Z to A) order.
AutoFilter – toggles between showing all data and showing only filtered data.
Show Top/Bottom Items – Shows a specified percentage or number on top or on bottom of the list.
AutoCalc – allows creation of total fields such as the sum, count, minimum, maximum, etc.
Subtotal – Hides or shows the subtotals or grand totals for a column or row.
Calculated Totals – allows you to specify a computation to display on the report.
Show As – Shows values as a percentage rather than a number.
Collapse – Hides lower level items for a column or row.
Expand – Shows lower level items for a column or row.
Show/Hide Details – Hides or displays details for a column or row.
Refresh – refreshes the report. May take several minutes depending on the report and the report cannot be interacted with while refreshing.
Export to Excel – exports data to an Excel spreadsheet.
Commands and Options – opens or closes the Commands and Options window.
PivotTable Field List – opens or closes the Pivot Field List.

- Pivot Table Help – opens or closes the help specific to creating and modifying pivot tables.

Arranging Reports

Let's explore the different ways you can organize reports including creating a report type and a new folder. We'll also discuss public v. private reports and what data you or others may see in reports.

Report Types

Four report types are created by default – Learner, Instructor, Manager, and Administrator. You are able to create you own private Report Type.

1. Under the File menu, choose New, then choose Report Type.

2. Type a unique report type name (add initials and an underscore to the front of the report type name) and click Add.
3. Click Close.
4. Notice a new report type displays in the Report Type drop down list box. This is a private report type which means only you can see it.

Create your own Folder

You may also create your own private folder.

1. Choose the Report Type in which the new folder should be created.
2. Under the File menu, choose New, then choose Folder.
3. Type a unique folder name (add initials and an underscore to the front of the folder name) and click Add.
4. Click Close.

Private v. Public Reports

Above, we have mentioned that report types or folders may be private. You have permissions to create new report types, folders, and reports as well as the ability share them with other Administrators.

Viewable Report Data

Credit Union Administrators (CU Admins) can view everyone at their Credit Union. This means that if a CU Admin runs a report to see who has completed a certain learning activity, the only people who appear in the report are people at their credit union. The CU Admin cannot see people from another credit union even though they have also completed that same learning activity.

Additionally, CU Admins can see only learning activities of the type:

- ✓ CU Express Activity
- ✓ CUNA Course
- ✓ CUNA Exam

Simple Report Manipulation

Let’s make some modifications to an existing report by moving some report objects around then adding a field and using it as a filter.

Move Report Objects

1. Under Report Type, choose Administrator.
2. Click the plus sign next to the Registrations folder then choose Yet to be Completed Exam Enrollments report.
3. The report appears.
4. Try moving objects around on the screen.
5. Try removing the Registration Status field off the report.

Add Filters and/or Fields Using PivotTable Field List

<u>Replace the Registration Status Field</u>

Let’s replace the Registration Status field as a filter.

1. Click the PivotTable Field list icon on the tool bar. This field list shows all the fields available to use within this report. Fields not in this list are not available to use in this report.

   HINT The PivotTable Field list appears at first to be in alphabetical order, but it is not.

2. Be sure the Registration Status field is removed. To remove it, scroll to about the middle of the PivotTable Field list, select Registration Status and drag and drop that onto the filters area just below the toolbar.

<u>Add a New Filter</u>

Scenario: Let's say you now need to filter by manager. This means the Manager Name field must become a filter for the report.

1. In the PivotTable Field list, find and select Manager Name.
2. Drag and drop Manager Name into the filter area just under the toolbar in the report area.
3. Click the down arrow next to the Manager Name filter.
4. Click All. Notice that clicking all selects or deselects all options.
5. Select only a few managers and click OK. Notice the report results change from showing all users to only those users who have the manager selected above.

   HINT When a filter has specific items selected the text below the filter changes to indicate what is selected. For example, text below the Manager Name filter changes from All to (Multiple Items). Additionally, the arrow icon next to the filter name changes from black to blue when a filter is applied.

6. Click the AutoFilter icon to see how it toggles from no filters to applying the selected filters.

<u>Add a New Row</u>

Let's say we'd like to add a see the user's primary job next to the user name.

1. In the PivotTable Field list, find and select User Primary Job.
2. Drag and drop User Primary Job to the left of the User Name. Be sure the blue highlight has a top and bottom horizontal line that point towards the User Name before dropping.

<u>Naming Conventions during Class</u>

You will be directed throughout this course to create items. Every item should start with your name or initials, then an underscore so others can identify the item and who it belongs to. A report named "Registration Status Report" should be named by an individual user as, for example, "Training Coordinator's Registration Status Report."

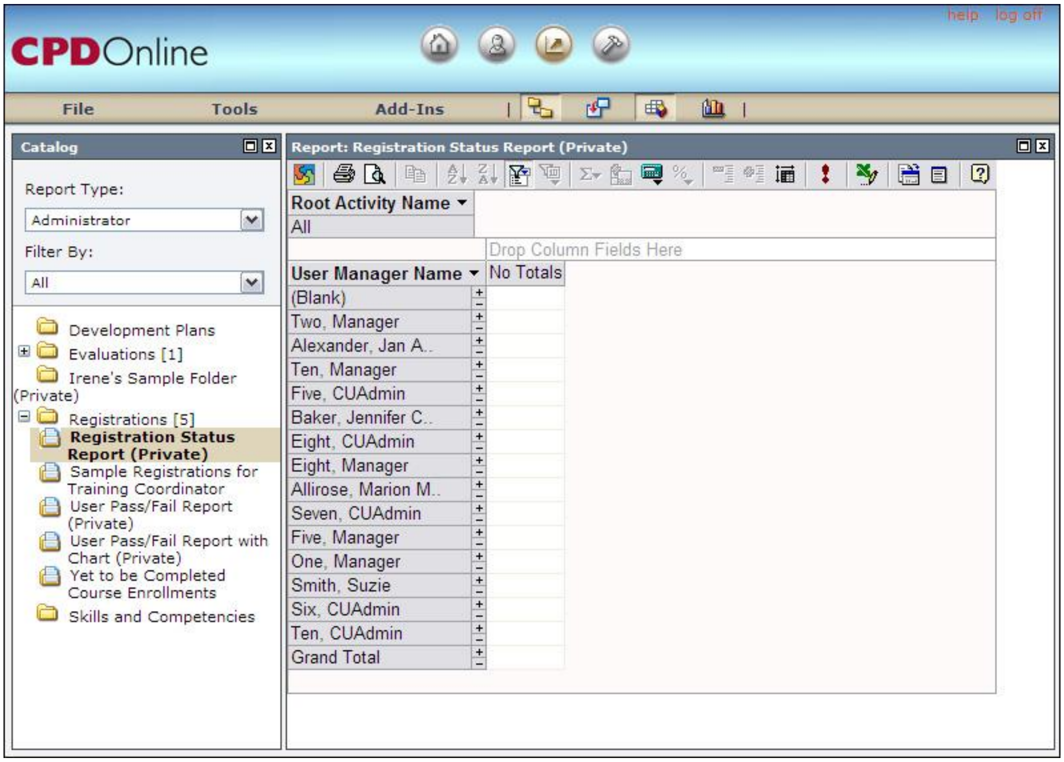
Create a New Report Using an Existing Report

Let's look at the Registration Status Report, modify it significantly, then save it out to a new name as our own private copy.

1. Open an Existing Report

2. Click the Report Manager mode icon at the top of your screen.
3. The Report Manager tutorial automatically opens. For now, close it.

4. Under Report Type, choose Administrator.
5. Click the plus sign next to the Registrations folder then choose Registration Status Report.
6. The report appears similar to the one shown below.



Ascending and Descending Order

Notice the User Manager Names are seemingly in a random order. Let's try sorting the data.

7. Click on the column titled User Manager Name.
8. Click on the Sort Descending icon to sort the manager's names in descending order.
9. Click on the Sort Ascending icon to sort the manager's names in ascending order.

Finish Creating Report

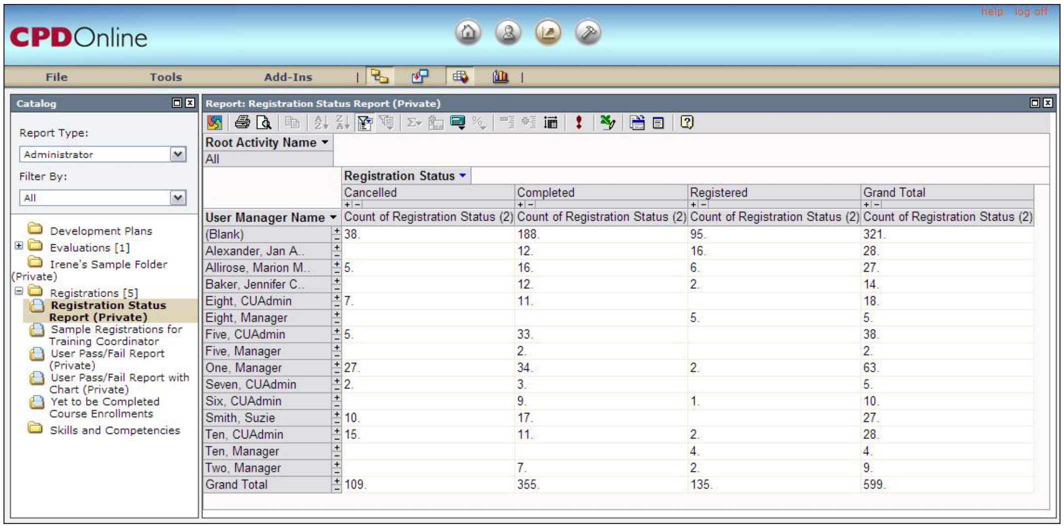
Let's now finish the report by adding the Registration Status columns.

10. Click on the Field List icon to view fields available for this report. **HINT** Only fields available in this data source are visible.
11. Drag and drop the Registration Status field onto the "Drop Column Field Here" area. Notice the registration status values of Cancelled, Completed, and Registered appear. [Click on the blue arrow icon next to the words Registration Status to see all values available. Notice only some are selected.]

Use AutoCalc Feature

Notice No Totals appears towards the center of the report. That's because we have not yet specified what we want to total. Let's specify that we'd like to see a total count of users (by manager) who have cancelled, completed, or registered for all learning activities.

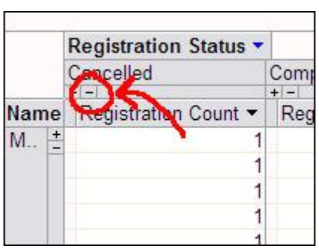
12. Click on the header name Registration Status.
13. Click on the AutoCalc Σ▾ icon and choose Count. Now the count for each registration status appears.



Group Rows or Columns

A great feature of Report Manager is that rows or columns can be grouped any way you choose even if the grouping is not in the data. For example, data can be grouped by region, by quarter, by manager type, etc. Let's say we want to group managers into three sets – Teller Manager, Credit Union Manager, or Unspecified Manager.

14. Click on the name of one of the managers, hold the Control (Ctrl) key down on your keyboard and select several more manager names.
15. Once several manager names are selected, right-click over one of the names and choose Group Items.
16. Lists will be expanded. To collapse them, click the minus sign below each registration status values.



HINT What do the many ones represent? The list of ones appears due to the way the data source was written. If various learners under a certain manager cancelled out of activities three times, three ones appear for that manager under the cancelled value. The total we saw earlier just totaled up the ones for us, now we are seeing the "raw" data.

Now let's repeat that process to create a second group of managers.

17. Click on the name of one of the managers in the "Other" group. Hold the Control (Ctrl) key down on your keyboard and select several more manager names from the "Other" group. Leave at least one manager unselected.
18. Once several manager names are selected, right-click over one of the names and choose Group Items.

Now let's name each group. To do so, we'll use the Commands and Options window which we will discuss in detail later.

19. Right-click over the words Group1 and choose Commands and Options.
20. In the Commands and Options window, click the Captions tab.
21. Under Caption, replace the word Group1 with Teller Manager.
22. Leaving the Commands and Options window open, click on the word Group2 on the report itself.
23. In the Commands and Options window, under Caption, replace the word Group2 with Credit Union Manager.
24. Leaving the Commands and Options window open, click on the word Other on the report itself.
25. In the Commands and Options window, under Caption, replace the word Other with Unspecified Manager.
26. Close the Commands and Options window.
27. OPTIONAL Click on the header User Manager Name then click the Sort Ascending icon to place the managers in ascending order.

Save the Modified Report

Let's save this modified report under a new name and leave it as a private report.

28. Under the File menu, choose Save As.
29. In the Report Name field, type your name then Registration Status Report and click Save.

HINT Be sure to provide a good name for the report. The name is what allows you (and others if it is public) to understand what this report shows and how it is different from other reports.

Modifying without Saving

If you make changes to a report, then navigate away without saving, no modifications are saved and the report is back to they way it was after the last save. This can be both advantages and disadvantages. You could spend an hour making changes to a report and have it just right. If you don't save it before navigating away, all the changes are lost. Then again, if you make changes to a report and can't figure out how to get it back, navigating away puts it back in the last saved state.

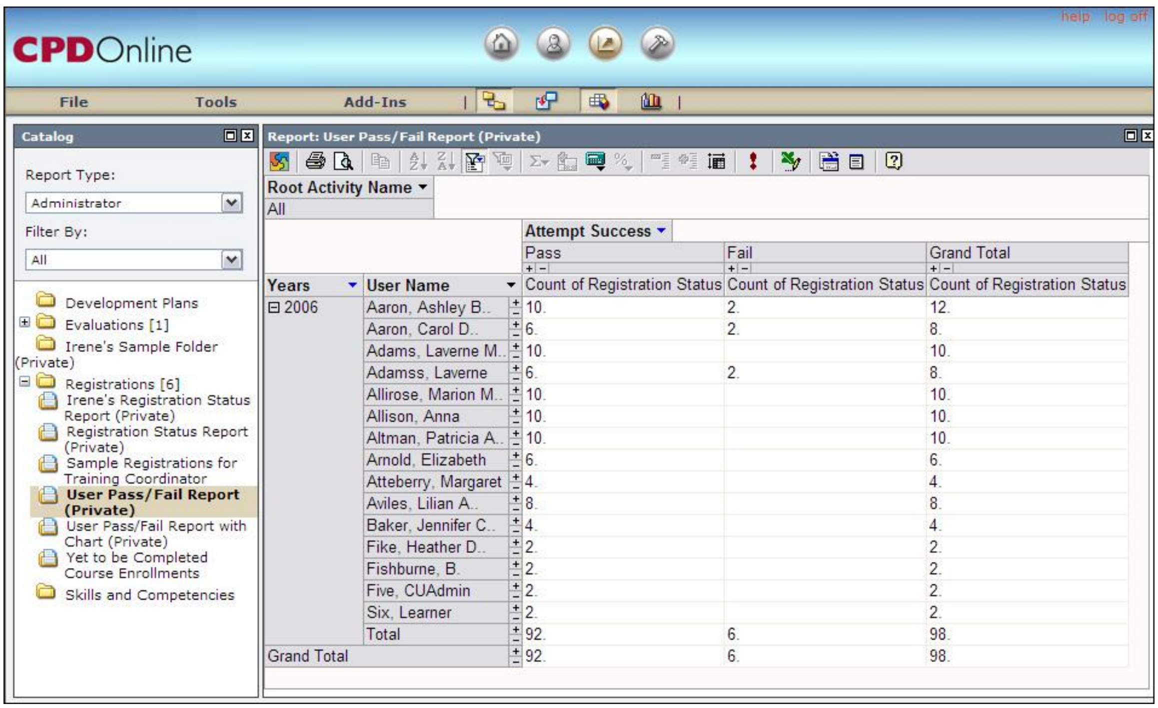
As a best practice, save the report often – perhaps every 5 or 10 minutes – as long as you like the way the report is developing. That way, if the report gets messed up, you can get back to the last (quite recently) saved state. Additionally, you can set a user preference for Report Manager to prompt you to save your changes as you navigate away from a report or create a new report. (Under the Tools menu, choose User Preferences. Check the box for Alert on Unsaved Reports and click Save.

Create a New Report

Let's try creating a brand new report from scratch like the one entitled "User Pass/Fail Report." At first, the blank report looks very different from the existing reports we've used so far, but it will soon seem familiar. Additionally, we'll set server-side filtering and add all fields including totals then make it public, sharing with a specific audience.

Preview Report

Below is an image of the report we are going to create. **HINT** When creating new reports from scratch, have an existing or similar report on hand (if possible) which will be enormously helpful to refer to for details.



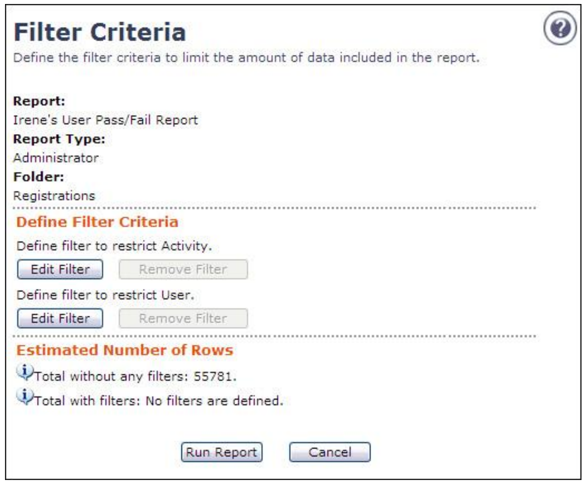
Create a New Report

Let's begin creating the new report.

1. Under the File menu, under New, choose Report.
2. In the New Report window, select the data source Activity Registration: Administrator then click OK.
3. In the Save Report window, in the Report Name field type your name then User Pass/Fail Report and click Save.

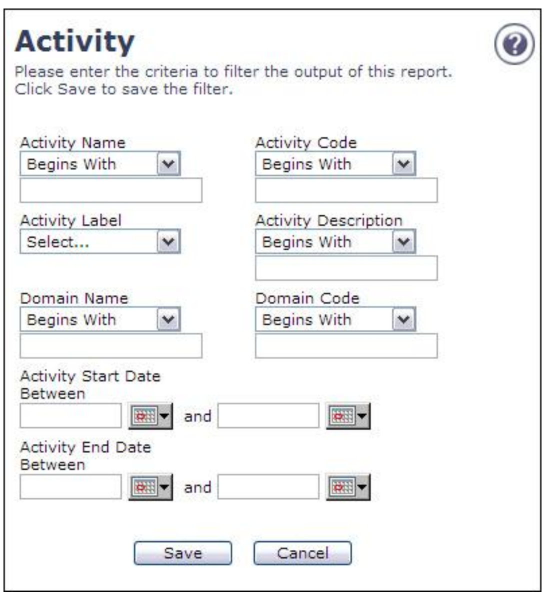
Server-Side Filtering

Before a report can be run, server-side filter criteria is requested. The filter criteria decrease the number of records from everything available in the data source to just the records you need. "Server-side" means the data is narrowed down on the server before the report appears on your local machine. Fewer records returned means the report runs faster for anyone accessing it. Add filters as much as makes sense for the report purposes.



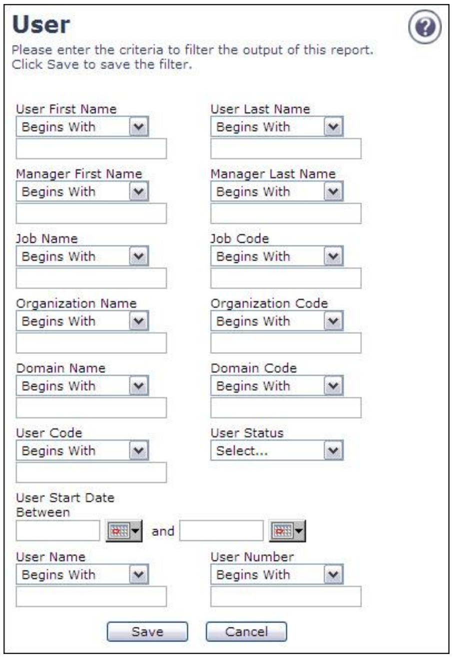
Notice the estimated number of rows listed towards the bottom of the Filter Criteria window. It is recommended that the Total with filters should be not exceed about 50,000 records otherwise the report may not run at all. Data returned can be restricted by activity or by user. For this new report, we will not set any filters, but let's explore the server-side filters that can be set.

4. Under Define filter to restrict Activity, click Edit Filter.



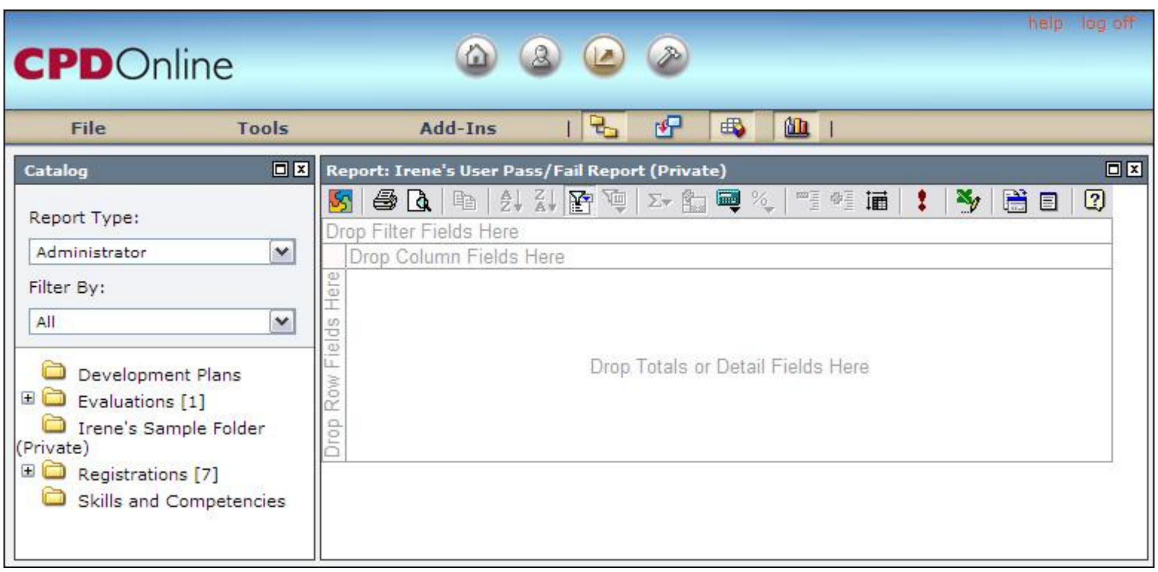
Notice the activity can be restricted by name, code, label, description, domain name or code, or activity start or end dates.

5. Click Cancel.
6. Under Define filter to restrict User, click Edit Filter.



Notice the user can be restricted by name, manager, job, organization, domain, code, status, start date, username or user number.

7. Click Cancel.
8. In the Filter Criteria window, click Run Report. A blank report appears.



Add Filter, Column, Row, and Total Fields

Remember the report previewed above? The Filter Field is the Root Activity Name; the Column Field is Attempt Success (shows pass or fail); the Row Fields are User Name and Year; and the Total Fields shows the total count of passed or failed. Let's use the PivotTable Field List to drag and drop the fields in the correct location.

9. Click the Field List icon on the Report Area toolbar. **HINT** Remember the field list is NOT in alphabetical order.
10. From the Field List, drag the Root Activity Name field and drop it onto the words "Drop Filter Fields Here."
11. From the Field List, drag the Attempt Success field and drop it onto the words "Drop Column Fields Here."
12. From the Field List, drag the User Name field and drop it onto the words "Drop Row Fields Here."
13. In the Field List, click the plus sign next to the Activity Start Time By Month then drag the Years field and drop it to the left of the User Name row fields.
14. From the Field List, drag the TotalCount field and drop it onto the words "Drop Totals or Detail Fields Here."
15. Select the Attempt Success header.
16. Click the AutoCalc icon Σ▾ and choose Count.
17. Collapse the Fail, Pass, and Grand Total columns by clicking the minus sign under each.

Filter Data Displayed

The report is closer to the desired report, but displays too much data. A filter needs to be added to the Attempt Success field and the Years field.

18. Click the black down arrow next to the Years header.
19. Uncheck the checkbox next to (Blank) leaving only 2006 checked then click OK.
20. Click the black down arrow next to the Attempt Success header.
21. Uncheck the checkbox next to Unsupported Value leaving only Pass and Fail checked then click OK. **HINT** Notice that the arrow next to filtered headers turns blue when a filter is applied.

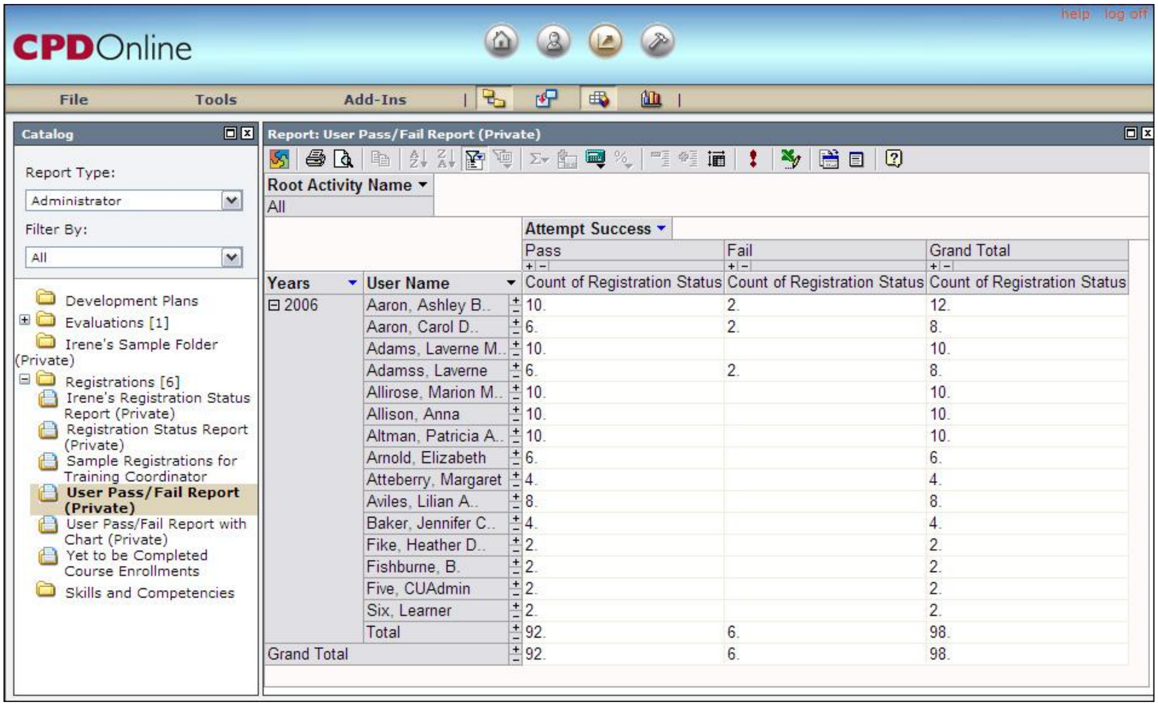
Move Columns

Move the columns so that Pass shows first, Fail second, then the Grand Total.

22. Click the column header name Fail.
23. Drag and drop the Fail column to the right of the Pass column.

Verifying Report Data

Now is a good time to stop and discuss the data displayed in the report. In the report displayed below, the user Ashley B. Aaron, in the year 2006, passed 10 activities and failed 2. Keep in mind, the totals displayed will depend on how the data source is written. The learner may have registered for 9 activities, one of which they took twice, and two of which they first failed then later passed. That's a total of 12 attempts, not 12 separate activities. Be sure to verify that the data on the report displays or calculates as desired.



Control Viewability by Job, Manager, or Individual

Let's save this modified report under a new name and leave it as a private report.

24. Under the File menu, choose Save.
25. In the Catalog area of the screen, right-click over the new report and choose Properties.
26. In the Report Properties window, uncheck Private and choose Next. Notice the report audience may be the same as the parent (the folder's audience or the report type's audience if no folder audience is specified) or a specified audience.
27. In the Audience Criteria window, check the box next to Job Categories and click Next.
28. In the Audience Definition (Select job categories) window, choose Loan Processor. Notice the Shift key or Control key allows selection of a list or multiple individual items.
29. Click Next.
30. Click Show Qualifying Users to see a list of all users that meet the criteria defined. Close the window when done.
31. Click Finished.

HINT A shared report can be modified by anyone who can see it (if they have rights to modify reports). They can save their modified report to a new name. Only an owner of a report can save modifications to it.

Delete Reports

You are allowed to delete you own reports, but unable to delete reports owned by anyone other than yourself.

Delete a Report

Let's delete the report we modified at the beginning of this lesson. **HINT** Deletion of a report is NOT recoverable. There is no Undo button.

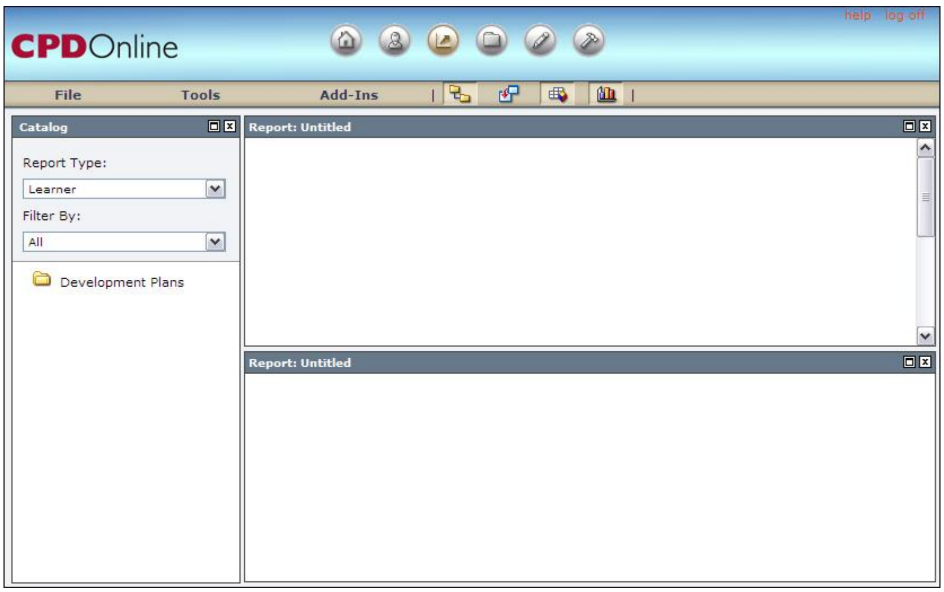
1. In the Catalog area of the screen, right-click over the report entitled "[your name] Registration Status Report" and choose Delete.
2. You are prompted to confirm deletion, click Yes.

Charting Data

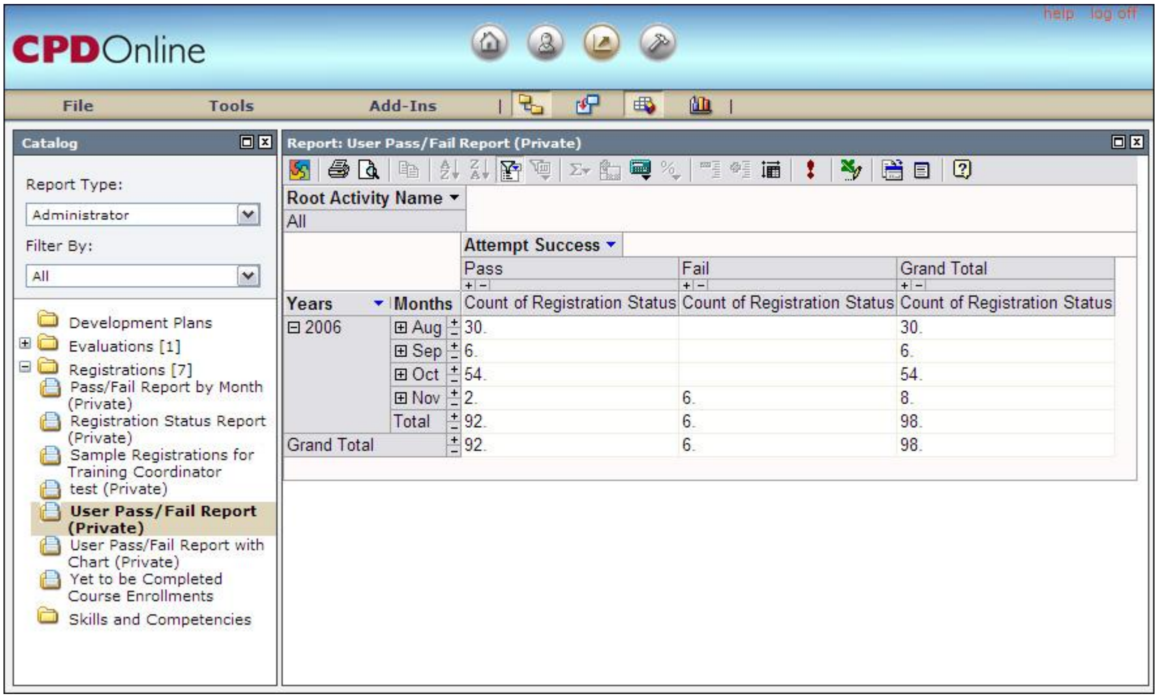
Open an Existing Report

Let's begin by opening an existing report. This report has been prepared as an example where the data is complete; our goal is to create a chart for this data.

1. Click the Report Manager mode icon  at the top of your screen.
2. The Report Manager tutorial automatically opens. For now, close it.



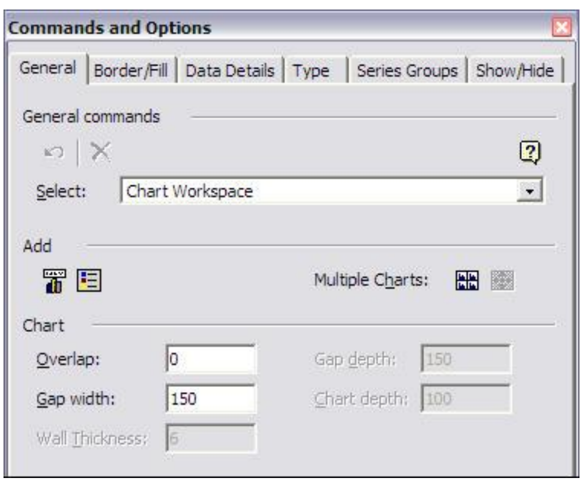
3. Under Report Type, choose Administrator.
4. Click the plus sign next to the Registrations folder then choose Pass/Fail Report by Month.
5. The report appears similar to the one shown below.



Create Report Charts

Using the existing report, let's have the corresponding chart appear then we'll modify it a bit.

6. On the top menu bar, click the graphics button so the Chart Area of the screen appears.
7. On the Chart Area toolbar, click the Commands and Options icon .

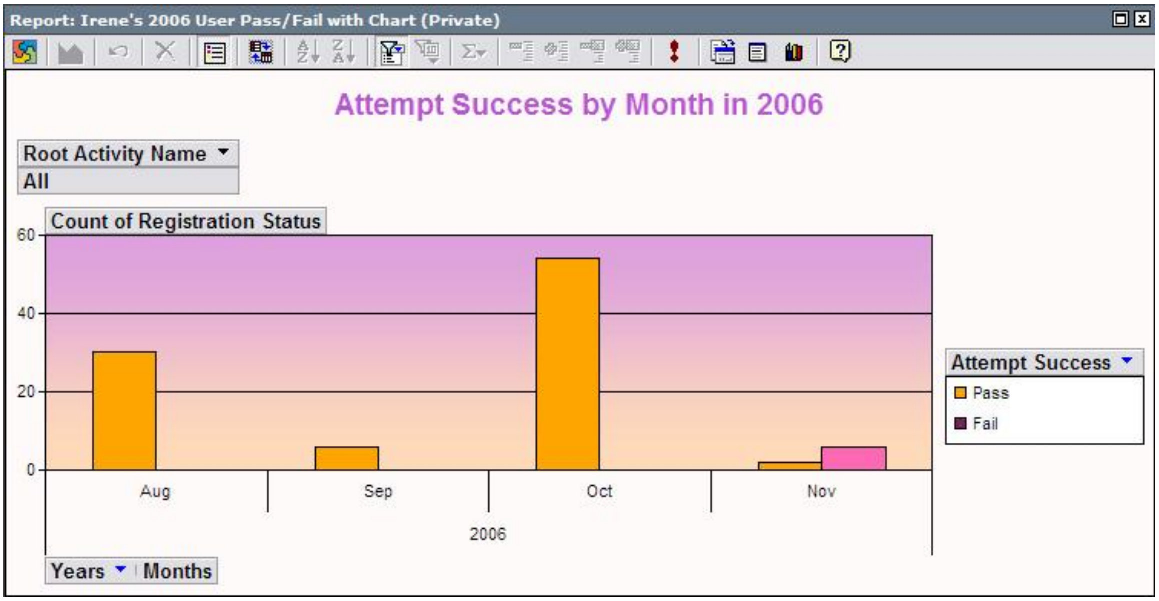


8. Click the Data Details tab.
9. Check the checkbox next to Plot detail records. A Microsoft Office chart prompt appears.
10. Click Yes.
11. Uncheck the checkbox next to Plot detail records. A Microsoft Office chart prompt appears again.
12. Click Yes again. The chart redraws as desired.

Fine-Tune the Report Properties

Now that the chart has appeared, let's use the Commands and Options window to modify some of the chart properties. We'll cover common tasks performed within that window to become familiar with it.

Below is an example of the result of the changes we'll make with the chart – add and format a title, modify colors and patterns of the bar chart itself, and show the legend.



<u>Title</u>

Add a title to the top of the chart.

1. In the Commands and Options window, click on the General tab.
2. In the middle of the dialog box, click on the Add Title button .
3. In the Chart Area itself, click on the words Chart Workspace Title.
4. In the Commands and Options window, click the Format tab.
5. Change the caption to "Attempt Success by Month in 2006."
6. OPTIONAL Change font type, font style, and color, if desired.

<u>Colors</u>

Change the colors used in the chart.

1. Leaving the Commands and Options window, click on the gray area of the chart.
2. Click on the Border/Fill tab.
3. Under the Fill area, click on the paint bucket icon and choose another color such as plum.
4. Drop down the Fill Type list box and choose Gradient.
5. Leaving the Commands and Options window, double-click one of the bars that appears in the chart.
6. Under the Fill area, click on the paint bucket icon and choose another color such as navy.
7.

<u>Legend</u>

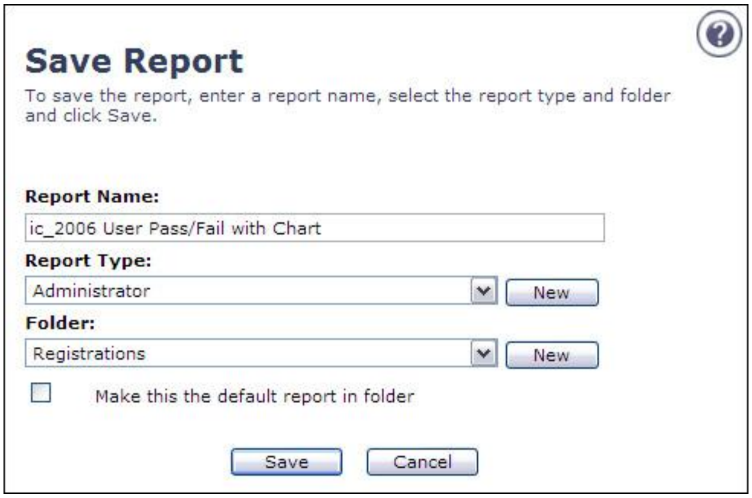
Display the legend at the middle right.

1. Hide or show the legend by clicking on the icon on the menu bar in the Chart Area of the screen.

Save the New Report

Let's save this modified report under a new name (leaving it as a private report).

1. Under the File menu, choose Save As.
2. In the Report Name field, type your name then Pass/Fail Report by Month with Chart.



HINT Be sure to provide a good name for the report. The name is what allows you (and others if it is public) to understand what this report shows and how it is different from other reports.

Sharing Report Data

Send a Report URL to Others

You can share this report with others and let them know by sending them an email containing the URL to the report. The recipient can click on the URL and view the report.

Keep in mind:

- ✓ Recipients of the email must be able to access Report Manager mode (they must enter their log on name and password) and have the appropriate role in order to view the report.
- ✓ The report must be public so others can view it.
- ✓ All the rules about data visibility apply when viewing a report through a URL. Therefore, if you can see 50 users, but the email recipient can only see 10, their report will show only those 10 users.
- ✓ The Send URL feature does not work properly with Outlook 97; you must use a more recent version of Outlook.

To mail a report URL:

1. Make sure it is a public report.
2. Under the File menu, choose Send URL. A new email message appears (using your default email client) and the body of the message contains the report URL.
3. Enter the email addresses of the recipients.

4. Change the body text as desired.
5. Send the message.

Distribute Whole Reports to Others

If your report is shared with other users who do not have the same view rights as you and they view the report online, the data displayed may be different. If you want to share the report exactly as you see it, you can print the report or export it to Excel.

1. Under the File menu, choose Print.
2. Select to print either the PivotTable or the Chart.
3. Click Print.
4. The PivotTable option exports the table to Excel. You can save the file or print using Excel's print feature.
5. The Chart option saves the chart to your local drive as an image called BIPChartImage.gif. Once you click Yes to save the image, a Print dialog box displays.

Administering Report Manager

In Report Manager, you are able to create our own report types and folders which you can leave as private or make public. We'll try doing that then try setting user preferences.

Add and Share Report Types

Let's begin by creating a new report type.

1. Under the File menu, under New, click on Report Type.
2. In the Manage Report Types window, type a new report type name (be sure to start the name with your name or initials) in the field at bottom then click Add. If you did not use a unique name, you may get an error specifying the Report Type name must be unique. **HINT** Notice this is the screen where you are able to delete Report Types you own.
3. Click Close.

By default, the report type will be private. To make it public:

4. In the Report Type drop down list box, choose the newly created report type.
5. Under the File menu, choose Properties.
6. Click Show next to the newly created report type.
7. In the Report Type Properties window, uncheck Private.
8. Click Share with everyone and click Submit.
9. Click Close.

Add and Share Report Folders

Now try creating a new folder.

10. Under the File menu, under New, click on Folder.
11. In the Manage Folders window, type a new folder name (be sure to start the name with your name or initials) in the field at bottom then click Add. If you did not use a unique name, you may get an error specifying the Report Type name must be unique. **HINT** Notice this is the screen where you are able to delete Report Types you own.
12. Click Close.

By default, the folder will be private. To make it public:

13. Right-click over the newly created folder and choose Properties.
14. In the Folder Properties window, uncheck Private.

15. Click Same audience as parent and click Submit. This means the audience will be the same as the Report Type under which this folder lives.

Delete a Report Folder

To delete a report folder:

1. Right-click over the folder you just created and choose Delete. A dialog box appears asking you to confirm you want to delete.
2. Click OK. The folder is deleted.

HINT You are unable to delete folders that contain one or more reports. You must first delete the reports in the folder (which you can do only if you own those reports) before you can delete the folder itself.

Delete a Report Type

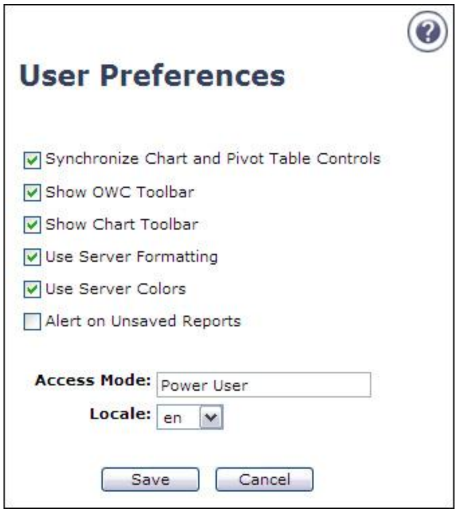
To delete a report type:

1. Under the File menu, under New, click on Report Type.
2. In the Manage Report Types window, select the newly created report type name and click Delete. A dialog box appears asking you to confirm you want to delete.
3. Click OK. The report type is deleted.

HINT You are unable to delete report types that contain one or more folders. You must first delete the folders (and to do that, you must first delete reports in the folder which you can do only if you own those reports) before you can delete the folder then the report type.

Set User Preferences

User Preferences allows you to specify the way you prefer to have the interface displayed. See the help file for a chart on each preference on the screen below. To access this screen, under the Tools menu, choose User Preferences. **HINT** You can turn on an alert to warn you of unsaved reports when you try to create a new report or access an existing report without saving the changes to the report being displayed.



Resources: Documentation, Tutorial, and Online Help

There are three main ways to get help in Report Manager. This documentation shows you the basics of using Report Manager. Whenever Report Manager is opened, the Report Manager tutorial appears. Online help provides an excellent reference for specific questions about using Report Manager.