



## QUICK START GUIDE



Version 4.00

November, 2018

## Summary

1. Introduction.....	3
2. BXBreports features .....	3
3. Where to start? .....	3
4. The menu bar .....	5
4.1. File .....	5
4.2. Settings .....	5
4.3. Sorting.....	5
4.4. Filters .....	5
4.5. Cube.....	5
4.6. Level.....	5
4.7. Export.....	6
5. Configuring (new) reports .....	7

## 1. Introduction

BXBreports is an end-user report builder software tool based on the data available in BI (Business Intelligence) datamarts.

The report creation wizard is simple and friendly. Therefore, the end user can configure, group, sort and filter the columns he wants to see on his report.

## 2. BXBreports features

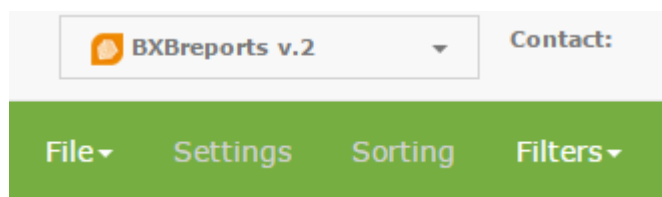
BXBreports allows to:

- Configure new reports \*
- Rename and modify reports \*
- Apply filters
- See the infos either in detailed or in grouped/summarized ways
- Show and hide reports from Initial Panel
- Manage Favorites list
- Export reports in .pdf and .csv formats
- Send reports by e-mail

\*These features are not available for *Viewer edition* users.

## 3. Where to start?

After logging in BXBwebsite, if the software is not placed in BXBreports v.2 module, select it through the combo-box at the upper left corner of the screen (*Figure 1*).



*Figure 1 – Module combo-box*

If there are some reports configured previously, a list of these reports may be exhibited (*Figure 2*) and you can open one of these reports by clicking on the respective name and afterwards on the “Open” button. However, if:

- a) Some of these reports are checked as “Favorites” (3<sup>rd</sup> column in the list of *Figure 2*), the list may show only the “Favorite” reports (but you can change it by clicking on the “Show” combo-box). There you can also open one of these reports by clicking on the respective name and afterwards on the “Open” button.

Note: you can also check/uncheck the reports as “Favorite”, as you want.

- b) One of these reports has the “Panel” radio-button assigned, this report will be shown immediately when you enter BXBreports module (in this case, no list will be shown).

Note: in this case, if you want to see another report, you have to click on the menu File / Open.

- c) There is no one reports configured yet or the logged user has no access permission to some report, the list will be empty. In this case, if your license is a Personal or Professional edition license, you can create new reports, following the instructions of the “Configuring reports” chapter.

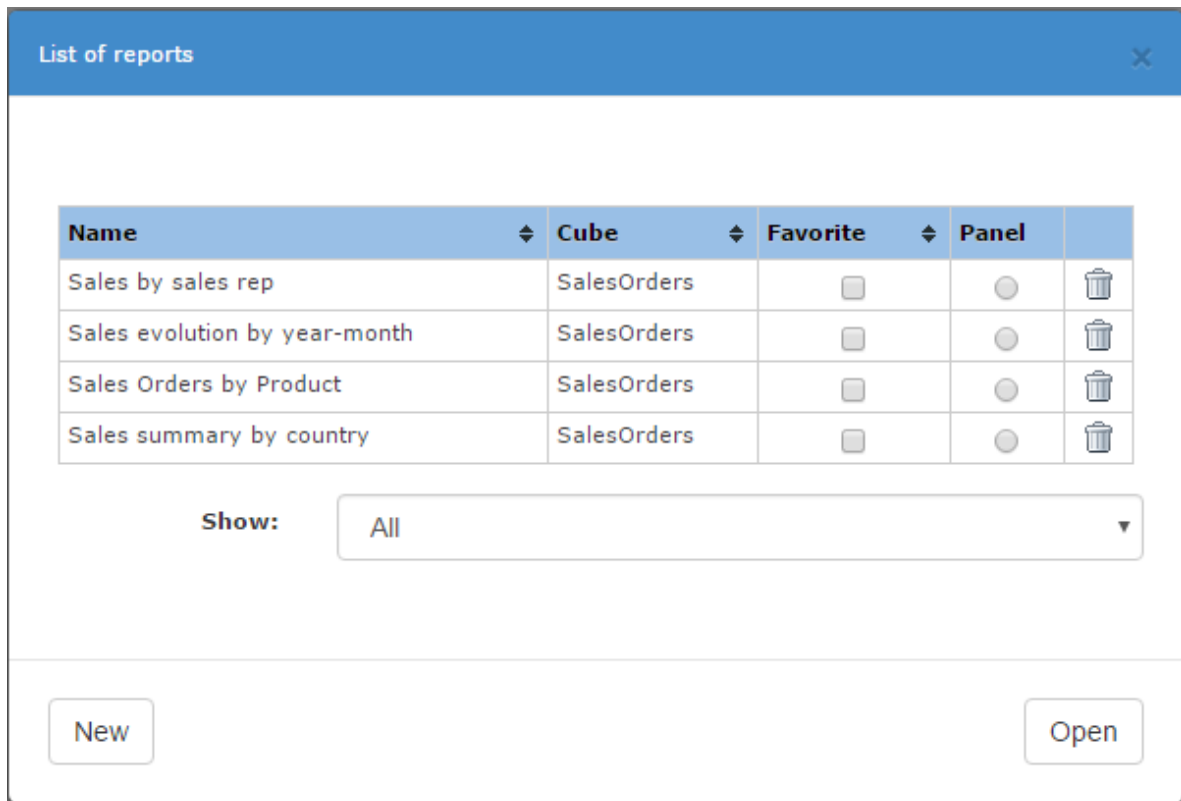


Figure 2 – List of reports

**Note:**

The last column (trash icon) will be shown only for the owner of the report or if the owner gave delete/update rights to all users. It will either not be shown for Viewer edition users.

## 4. The menu bar

The following options are available on the menu bar:

### 4.1. File

For Viewer edition users, only the option “Open” will be available from the File menu. For Personal and Professional edition users, the options *Rename*, *Save* and *Access permissions* will be available only for the owner of the report or if the owner gave delete/update rights to all users.

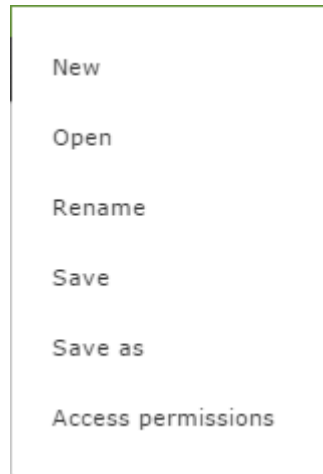


Figure 3 – Menu File options

### 4.2. Settings

Opens the report configuration wizard, which will not be available for Viewer edition users.

### 4.3. Sorting

Allows changing the presentation sequence of the data. The default is “ascending” for all the columns, but you can move the desired column(s) from the left panel to the right panel and then modify the order by clicking on the respective combo-box.

### 4.4. Filters

Here you can:

- a) Hide and show the “Applied filter” infos box; and
- b) Apply an *ad hoc filter*. It means that the filter is applied only on this visualization. Closing the report, this filter configuration will be erased.

### 4.5. Cube

This option opens a window with infos about the data behind the report (updating date/time and how many rows it contains).

### 4.6. Level

Here you can redefine the summary or detailed level to show the data. The number of levels available comes from the grouping definition.

#### 4.7. Export

Allows to export the data in text file (CSV format) and also to send the report through e-mail as an attached CSV or PDF file.

#### Summary of what menu options may be available

Menu options	Viewer edition	Personal ed.	Professional ed.
File / New		X	X
File / Open	X	X	X
File / Rename		*	*
File / Save (new report)		X	X
File / Save (existing repor)		*	*
File / Save as		X	X
File / Access permission		*	*
Sorting	X	X	X
Filters	X	X	X
Cube	X	X	X
Level	X	X	X
Export	X	X	X

\* if the owner grant access to all users

## 5. Configuring (new) reports

To set up new reports you may use the step-by-step wizard, which can be accessed through 2 ways:

- a) The “New” option in the “File” menu; or
- b) The “New” button in the *List of reports* (Figure 2)

### 5.1 Report name and cube selection

The *Reports settings wizard* opens showing the first step, where you have to inform the report name and select the cube which will provide the respective data.

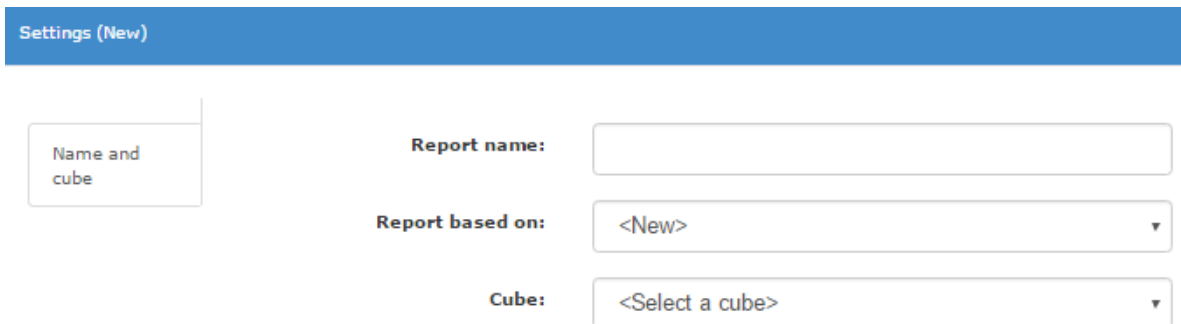


Figure 4 – Step 1 of reports setting wizard

### 5.2 Columns selection

Having completed the first step, a click on “Columns” at the left margin of the settings window (Figure 5) and a list with the available columns will be shown.

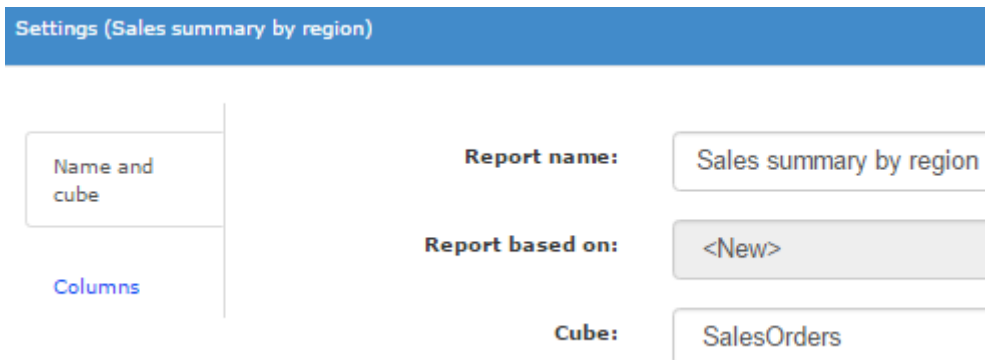


Figure 5 – Step 2 of reports setting wizard

On the left panel you can select the desired column and clicking on the arrow between the 2 panels the respective column will be moved to the right panel, which will compose the list of columns to be inserted in the report.

### 5.3 Grouping

This step can be used to summarize all data of a dimension in one line. Select the dimension in the left panel. The groupings can be done in many levels to obtain subtotals. In this case, the column with the highest total must be at the top of the report columns list, in the reports grouping panel.

### 5.4 Sorting

This step lets you define the data sorting to be displayed in the report. The grouped columns appear automatically in the right panel (Sort by) and the other ones can be selected (one by one) and transferred from the left to the right panel.

### 5.5 Persistent filter

These filters will be permanently applied on the report until further editing. After selecting the column to be filtered (in the first combo-box), you must also choose one of the 3 filter methods available through the 2<sup>nd</sup> combo-box:

- **By range:** where the fields *From* and *To* are used to inform the lowest and highest desired values. It's usually applied to numeric or date columns.
- **By pattern:** to filter data which contains the informed value in the field of the right panel. It's usually applied to alphanumeric columns (not available for date or numeric columns) and used in combination with a % sign. It works according to the example illustrated below (see Figure 6), based on a *Year-Month* column with all the months of the years 2006 and 2007.

Filtering	Result
%6%07%	2006-07
%07	2006-07 2007-07
%07%	2006-07 2007-01 2007-02 2007-03 ... 2007-12
2007%	2007-01 2007-02 ... 2007-12
%2007%	2007-01 2007-02 ... 2007-12
%2007	

Figure 6 – Filter By pattern

- **Selection list (discrete):** If the number of elements in the cube (for the selected column) is not greater than the maximum established in the field *Max. qty of members for filter list* of the user configuration window, the elements will be shown in a selection list (not available for numeric columns).

There is a setting called "**New Items**" with two options. If you select "*Check*", new discrete items entering the report will be automatically marked. The "*Uncheck*" option keeps the new items unmarked, giving to the user better control over the filters every new load of the report.



## 5.6 Initial filter

This step defines which filters will be always available when the user opens the report, where a filter screen appears with the respective (here defined) columns. Applying this feature, the report can be loaded with less rows (only the filtered rows) and so it can run faster.

## 5.7 Formatting fonts

Allows you to assign a font format (type, size, color, etc.) for a grouped report column, details and summary, by clicking on the arrow on the right of the font, size or color field, or clicking on the Bold, Italic or Underline button at the right panel.

## 5.8 Initial level

Here you can define how much detail you want to view in the initial screen of the report, since you have defined group columns. By default, if the suggestion to the right panel hasn't been changed, the report will appear in the most summarized format. Having multiple columns defined in the group, the report can be opened also with subtotal lines, as well as at the last level of detail.

## 5.9 Header and Footer

At this stage you can change information and position of the images in the **Header** and **Footer** of the report. By default, report name appears in the 1st line of the header, company name or code in the 2nd, and in the last line of the footer is displayed the name or code of the company that owns BXBreports license.

Text areas on the first and second line of header and footer can also be changed by inserting new texts or eliminating what is suggested. Only the function **%LC** (which displays the licensed company name or code) can't be eliminated (only moved).

To insert any of the functions listed to the right:

- Position the mouse where you want to enter the function;
- Select the line corresponding to the desired function (RD%, for example)
- Click on the arrow at the left of the Functions list.

## 5.10 Others

In this last step you can set some extra configuration of the report, as shown below:

- **PDF generation:** Allows you to change the PDF layout between portrait and landscape.
- **Paper:** the default format is A4, but in the combo-box there are many other options available.
- **Stripped background:** to get alternate rows' background in light gray.

After clicking on the **"OK"** button you will have a preview of the report. If the result is what you were expecting, remember to **"Save"** the report (in menu **"File"**), to be able to access it again in the future.