Report Center and Web Reports Guide

Axiom

Version 2021.1

Syntellis
10 S. Wacker Dr., Suite 3375
Chicago, Illinois 60606
847.441.0022
www.syntellis.com

Table of Contents

Introduction

The Report Center and web reports provide fully web-enabled reporting functionality for Axiom. This guide discusses how to use the Report Center, and how to create and use web reports.

Intended audience

This guide is intended for all users of Axiom, from users who only consume existing reports to web report creators.

What is covered in this guide?

This guide covers the following:

- Using the Report Center to find, open, and create reports
- Using existing web reports to view and explore data
- Creating new web reports using the Report Builder
- Configuring report components in the Report Builder
- Configuring report drilling in the Report Builder
- Creating fixed row structures for use in web reports

What is not covered in this guide?

The following related topics are not covered in this guide:

- **Table setup and administration.** Creating web reports requires general knowledge of your system's data structures, including the available tables and columns and their relationships. For more information, see the *System Administration Guide*.

All documentation for Axiom can also be accessed using the Axiom Help Files.

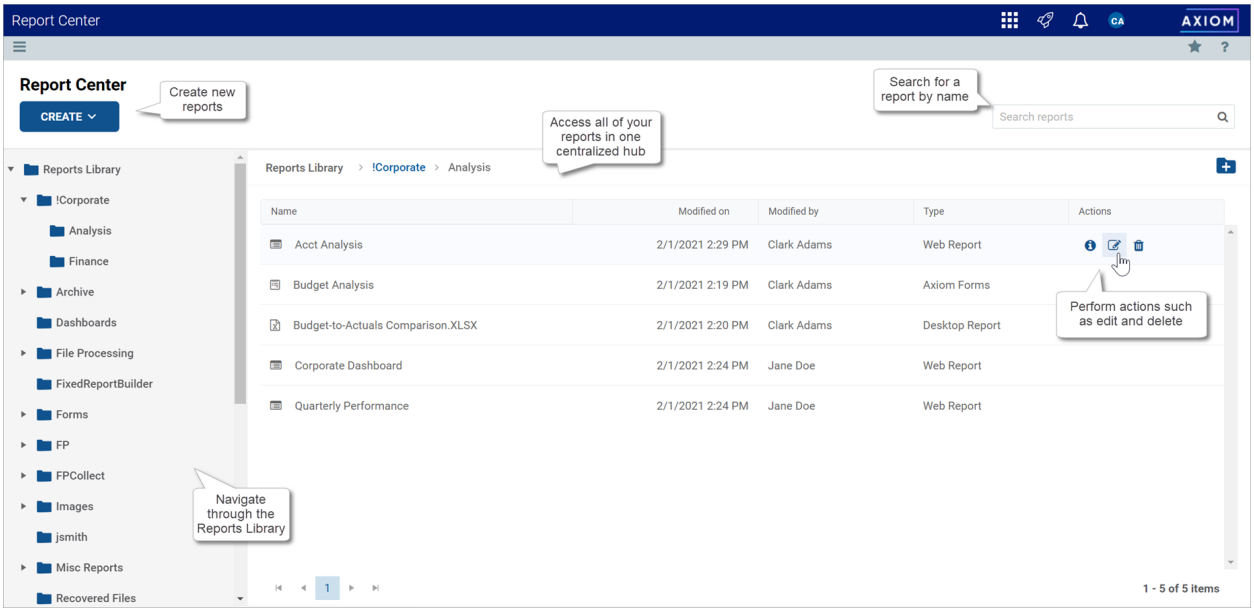
2

Report Center

The Report Center is a centralized hub where you can view any report that you have access to in the Axiom Reports Library—including web reports, Axiom forms, Axiom Intelligence reports, and desktop (spreadsheet) reports.

Using the Report Center, you can:

- View any report you have access to, regardless of the report type
- Create new web reports (all clients) and Axiom Intelligence reports (clients with certain product licenses)
- Open reports for editing, in the appropriate editor for the report type
- Perform other report management activities, such as creating and deleting folders

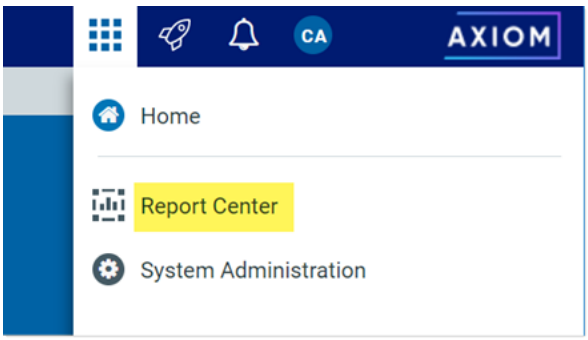


Example Report Center

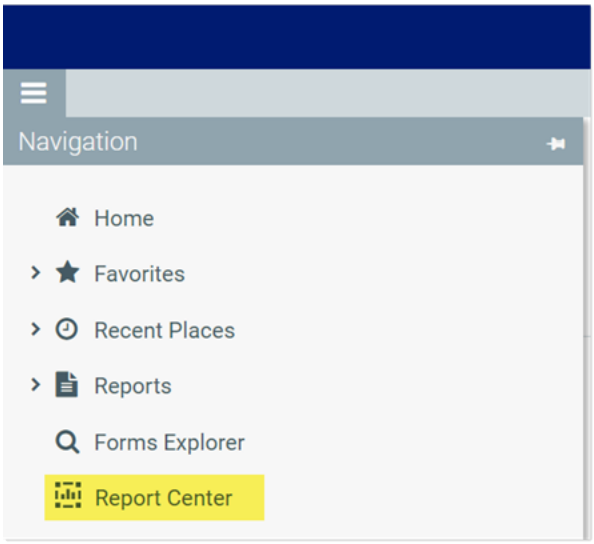
Accessing the Report Center

All users can access the Report Center in the Web Client browser:

- Click the menu icon in the Global Navigation Bar. From the Area menu, select **Report Center**.

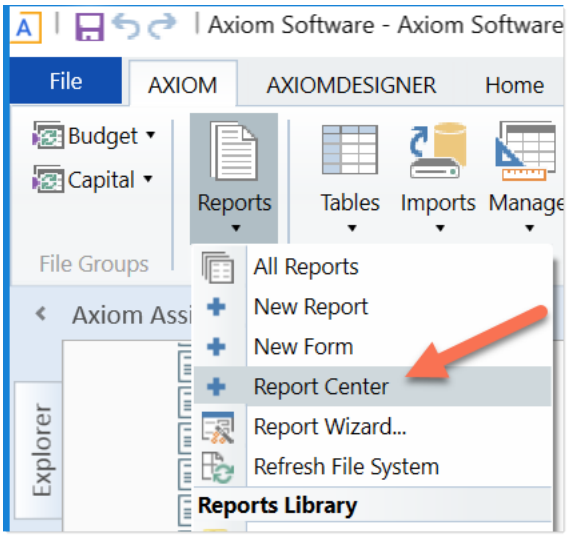


The Report Center may also be accessible from other areas of the Web Client, such as in the left-hand Navigation panel, or from links in product-specific pages.



Report Center in the default Navigation panel

In the Desktop Client, you can open the Report Center from the **Reports** menu. By default this menu is present on the **Axiom** tab. If your system has installed products, it may be available to you on the **Main** tab.



Report Center on the default Reports menu

Opening reports

You can open any report that displays in the Report Center. The Report Center is automatically filtered to only show the reports that you have access to.

To open a report from the Report Center:

1. Do one of the following to locate the report that you want to open:
   - Use the folder tree to navigate to the folder where the report is located.

     OR
   - Use the Search box at the top of the page to search for the report by name.

   For more information on how to search, filter, and sort the Report Center, see Report Center overview.
2. Once the report displays in the Report Center grid, click on the report name to open it.
   - If the report is web-enabled, the report opens in a new browser tab. This applies to web reports, Axiom forms, Axiom Intelligence reports, and deprecated web reports.
   - If the report is a desktop spreadsheet report, Axiom attempts to launch the Axiom Desktop Client and open the report. This works as follows:
     - The launch routine uses the client that you last opened. For example, if you last opened the Axiom Windows Client, then the report is opened in the Windows Client.
     - If a client is already open, the launch routine is skipped and the report is opened in that client.

If other types of files are present in the Reports Library—such as PDF, Word, or PowerPoint—these files can also be opened from the Report Center if you have a program capable of reading the file type. Axiom attempts to open the file using the same routine that opens the Axiom Desktop Client. You must have access to either the Axiom Windows Client or the Axiom Excel Client to open these files.

Creating new reports

You can create new reports using the **Create** button at the top of the Report Center:

- **New web report**: This option opens the web Report Builder so that you can create a new web report from scratch. See Creating new web reports.
- **New report from template**: This option creates a new web report using a template provided by an installed product. See Creating new web reports from template.
- **New Axiom Intelligence report**: This option creates a new Axiom Intelligence report. This option is only available in systems where Axiom Intelligence is licensed and enabled.
- **New fixed row structure**: This option creates a new fixed row structure for use in a web report. See Creating fixed row structures.

Other Report Center actions

In the Report Center, you can use the **Actions** column to perform other report and folder management activities. To view the available actions, navigate to the item that you want to work with, then hover your cursor over the Actions column. Actions are available for report files, report folders, and fixed row structures.

The following actions are available:

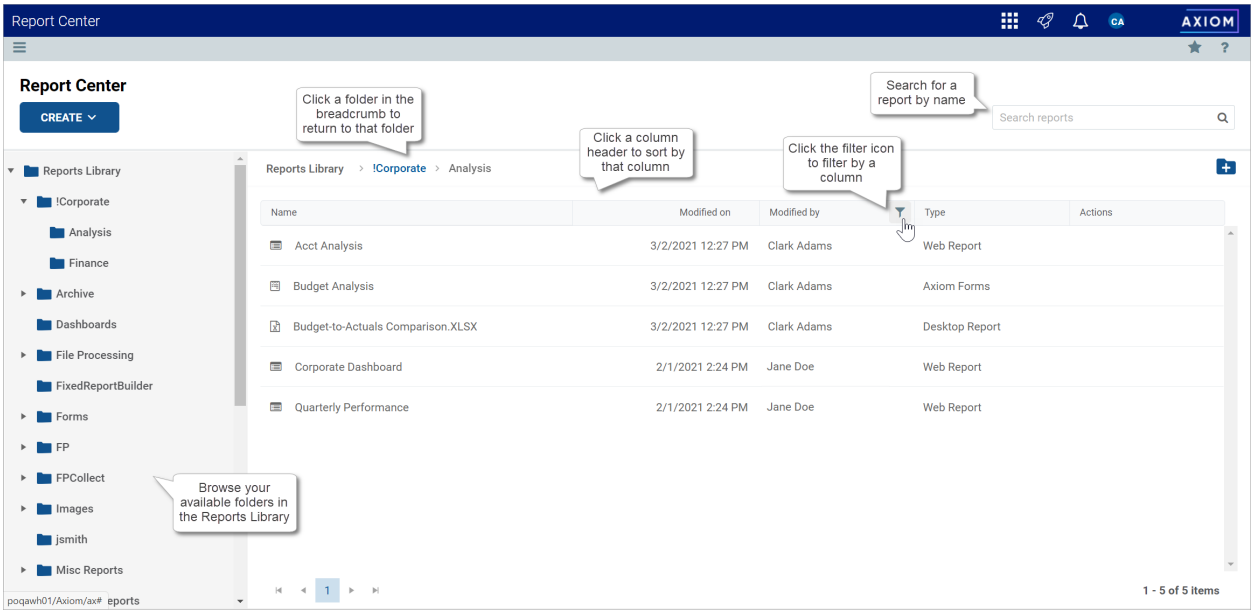
Icon	Action	Description	More Information
	Info	Opens an information panel for the current item. For folders, the panel can also be used to rename the folder.	• Renaming folders
	Edit	Opens the current item in the appropriate editor.	• Editing reports • Editing fixed row structures
	Copy	Generates a copy of the current item. Only available for fixed row structures.	• Copying fixed row structures
	Delete	Deletes the current item.	• Deleting reports • Deleting folders • Deleting fixed row structures

You can also create new folders by clicking the folder icon at the top right of the Report Center.

Report Center overview

Using the left side of the Report Center, you can navigate through the Reports Library folder tree. Once a folder is selected, the contents of that folder display in the report grid. You can click on a subfolder name to open that subfolder, or you can click on a report name to open that report.

As you navigate, a breadcrumb displays at the top of the report grid. You can click on a folder name in the breadcrumb to move to that folder location.



Navigating the Report Center

Searching the Report Center

You can use the Search box in the top right corner of the Report Center to find a report. The search matches on report name only.

To search for a report by name:

- Type your search text into the Search box, and then click the magnifying glass or hit the Enter key to search.

The report grid updates to show a list all reports that match your search text. You can open a report or perform other report actions using this list. You can also filter and sort this list as described in the following sections.

To clear a search:

- Click the **X** icon in the right side of the Search box.

Your search text is cleared, and you are returned to the folder location that you were viewing when you started the search.

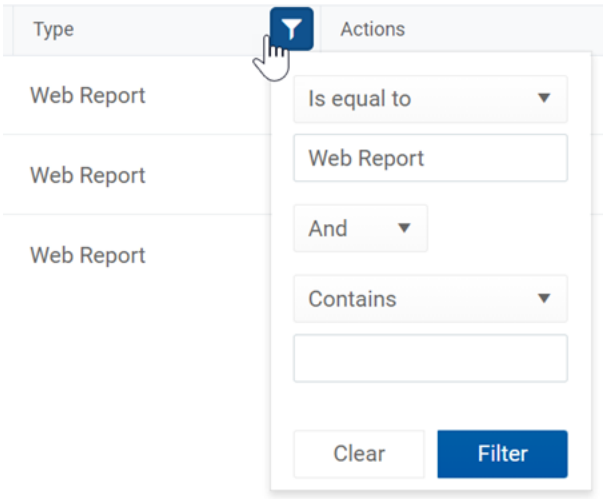
Filtering the report grid

When you are viewing a folder in the Report Center (or when viewing search results), you can filter the contents by any column in the report grid. For example, you can filter to show all reports of a certain type, or to show all reports created after a certain date.

To filter the report grid based on a column:

1. Click the filter icon in the column header to show the filter options.
2. Set the filter options as desired. You can set up to two filter options, combined with either AND or OR.
3. Click **Filter**.

The report grid updates to only show reports that meet the filter. Additionally, the filter icon in the column header is now outlined in blue to indicate that the grid is filtered by this column.



Example Report Center column with a defined filter

If multiple columns are filtered, the filters are combined using AND—meaning the grid only shows records that match all of the filters.

The column filter is retained until you clear it, or until you navigate to a new folder location. If you have filtered the search results, clearing the search results also clears the filter.

To clear a filter:

1. Click the filter icon in the column header to show the filter options.
2. Click **Clear**.

The report grid updates to clear the filter.

Sorting the report grid

When you are viewing a folder in the Report Center (or when viewing search results), you can sort the list by any column in the report grid.

To sort the report grid by a column, click on the column header. Each click toggles between ascending sort, descending sort, and no sort. If the report grid is currently sorted by a column, the sort direction is indicated by an arrow on the column header (up for ascending, down for descending).

The sort is reset when you move to a new folder location. If you have sorted the search results, clearing the search results also clears the sort.

NOTE: The grid can only be sorted by one column at a time. If you have sorted by a column and then you click the column header of a different column, the sort on the original column is cleared and replaced by the new column sort.

Managing report files in the Report Center

Using the Report Center, you can create, edit, and delete reports in the Reports Library.

Creating new reports

You can create new reports using the **Create** button at the top of the Report Center:

- **New web report**: This option opens the web Report Builder so that you can create a new web report from scratch. See Creating new web reports.
- **New report from template**: This option creates a new web report using a template provided by an installed product. See Creating new web reports from template.
- **New Axiom Intelligence report**: This option creates a new Axiom Intelligence report. This option is only available in systems where Axiom Intelligence is licensed and enabled.
- **New fixed row structure**: This option creates a new fixed row structure for use in a web report. See Creating fixed row structures.

Different security permissions are required to create new web reports versus Axiom Intelligence reports. These security requirements are detailed in the relevant topics.

Editing reports

You can open a report for editing from the Report Center if the report is eligible to be edited, and you have read/write permissions to the report.

To edit a report from the Report Center:

1. In the Report Center, locate the report that you want to edit. You can use folder navigation to find the report, or use the Search box at the top of the page.

2. Once the report displays in the Report Center grid, hover your cursor over the **Actions** column to make the action icons visible, then click on the Edit icon .
3. The report is opened for editing as follows, depending on its file type:
    - **Web reports** are opened in the Report Builder, in a new browser tab.
    - **Axiom Intelligence reports** are opened in the Axiom Intelligence Report Editor, in a new browser tab.
    - **Desktop reports** and **Axiom forms** are opened in the Axiom Windows Client, as spreadsheet report files.

Why is the Edit icon missing for some reports?

The following report types *cannot* be opened for editing from the Report Center. The Edit icon does not display for these files:

- **Web reports built from template**: If a web report is built from a template, the report is tied to that template and cannot be separately edited. For more information, see Creating new web reports from template.
- **Deprecated web reports**: The prior implementation of web reporting is deprecated. To edit a deprecated web report, click the file name to open the report, then click the wrench icon in the toolbar to open the legacy web report editor.
- **Other non-report file types**: The Reports Library can be used to store other non-report, non-Axiom file types, such as PDF, DOC, PPT, JPG, and others. These file types cannot be edited in Axiom.

Why is the Edit icon disabled for some reports?

If the Edit icon is present but disabled, this means that although the report type is eligible to be edited, it is not possible for you to edit this particular report. One of the following reasons may apply:

- You do not have edit permissions (Read/Write access) to the file.
- The file is product-controlled and therefore cannot be edited.
- The file is configured to prevent editing (applies to certain Axiom Intelligence reports).

Deleting reports

If a report is no longer needed, you can delete it using the Report Center. In order to delete a report (or any other file that resides in the Reports Library), you must have read-write access to the file and to the folder it resides in.

NOTE: In systems with installed products, product-controlled reports cannot be deleted.

To delete a report:

1. In the Report Center, locate the report that you want to delete. You can use folder navigation to find the report, or use the Search box at the top of the page.

2. Hover your cursor over the row with the report, then in the **Actions** column, click the Delete icon .

   If the report cannot be deleted, the Delete icon is disabled. This may occur because you do not have the necessary permissions to delete the report, or because the report belongs to an installed product.

3. When you are prompted to confirm that you want to delete the report, click **OK**.

The report is deleted from the system and no longer displays in the Report Center. If the report was deleted in error, an administrator may be able to restore the report using the **Restore Deleted Files** feature in the Desktop Client.

Managing folders in the Report Center

Using the Report Center, you can create, rename, and delete folders in the Reports Library.

Creating new folders

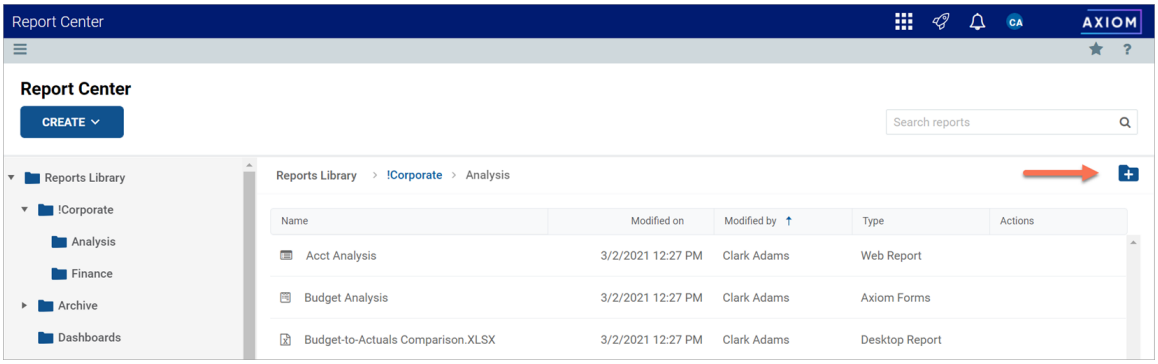
You can create new folders as needed in the Report Center. In order to create a folder, you must have read-write access to the parent folder.

To create a folder:

1. In the Report Center, navigate to the parent folder of the location where you want to create a new folder.

   For example, if you want to create a new top-level folder in the Reports Library, select the Reports Library. If you want to create a new folder underneath a folder such as Reports Library > Corporate Reports, then select the Corporate Reports folder.

2. Click the new folder icon at the top right of the Report Center grid.



3. In the **Create new folder** dialog, enter a name for the new folder, then click **OK**.

The new folder is created in the current location.

Renaming folders

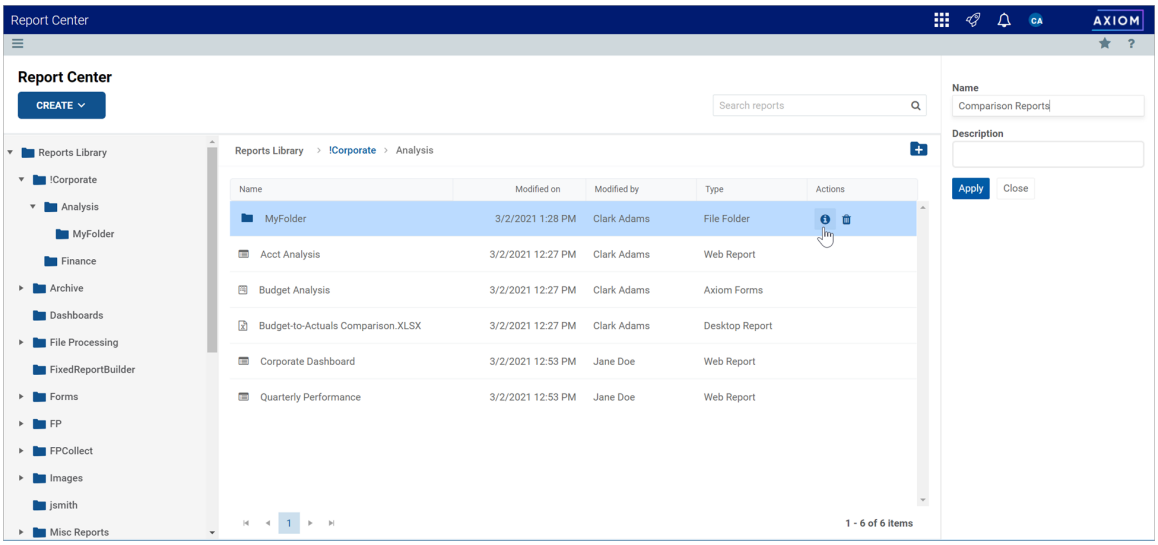
You can rename folders as needed in the Report Center. In order to rename a folder, you must have read-write access to the folder.

NOTE: In systems with installed products, product-controlled folders cannot be renamed.

To rename a folder:

1. In the Report Center, navigate to the parent folder of the folder that you want to rename, so that the folder you want to rename displays in the Report Center grid.
2. Hover your cursor over the row with the folder, then in the **Actions** column, click the Info icon .

   The Information panel opens along the right-hand side of the page.
3. In the Information panel, type the new folder name info the **Name** field, then click **Apply**.



   If the folder cannot be renamed, the **Apply** button does not display. This may occur because you do not have the necessary permissions to rename the folder, or because the folder belongs to an installed product.

The folder is renamed.

Deleting folders

If a folder is no longer needed, you can delete it using the Report Center. In order to delete a folder, the folder must be empty and you must have read-write access to the folder.

NOTE: In systems with installed products, product-controlled folders cannot be deleted.

To delete a folder:

1. In the Report Center, navigate to the parent folder of the folder that you want to delete, so that the folder you want to delete displays in the Report Center grid.
2. Hover your cursor over the row with the folder, then in the **Actions** column, click the Delete icon .

   If the folder cannot be deleted, the Delete icon is disabled. This may occur because you do not have the necessary permissions to delete the folder, or because the folder belongs to an installed product.

The folder is deleted from the system and no longer displays in the Report Center. There is no confirmation dialog before deleting an empty folder. If the empty folder was deleted in error, you can create a new folder with the same name.

3

Web Reports

Axiom web reports provide a fully browser-based reporting option for Axiom data. You can create, edit, and view web reports all within the Axiom Web Client.

Web reports are designed to be intuitive for report designers to build, and easy for report viewers to use. The Report Center provides a centralized hub to create new web reports and to view any report that you have access to.

Web reports support two different ways to display reporting data in a grid:

- **Dynamic rows**: Dynamically display data rows based on a specified dimension or grouping.
- **Fixed rows**: Use predefined fixed row structures to organize data rows into sections with headers, totals, and subtotals.

Web reports can be created from scratch using the Report Builder, or you can create them from templates provided by installed Axiom products.

Opening web reports

Web reports are browser-based reports. You can browse all of the web reports that are available to you and open them to view the report data. In order to open a web report, you must have at least read-only access to the report, as defined in Axiom security. Web reports can be opened from either the Web Client or the Desktop Client.

This topic discusses the default ways to access and view web reports. Your system may be designed so that you can open web reports in other ways, such as:

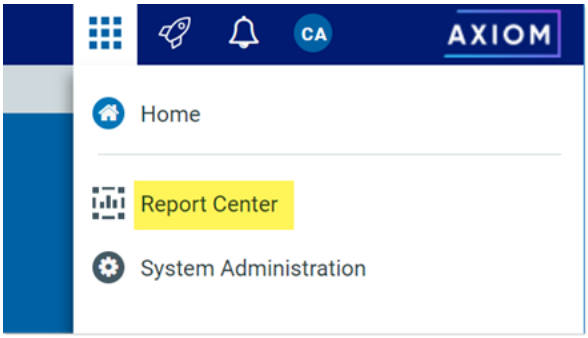
- Using the Navigation panel in the Web Client
- Using links within your home page or product pages
- Using links within a task pane or ribbon tab in the Desktop Client

▶ Opening web reports from the Report Center

The Report Center in the Web Client is a hub where you can access all of your available reports, regardless of the report type. The Report Center is automatically filtered to show only the reports that you have access to.

To open a web report from the Report Center:

1. Click the menu icon in the Global Navigation Bar. From the Area menu, select **Report Center**.



2. Do one of the following to locate the report that you want to open:
   - Use the folder tree to navigate to the folder where the report is located.

     OR
   - Use the Search box at the top of the page to search for the report by name.

   For more information on how to search, filter, and sort the Report Center, see Report Center overview.
3. Once the report displays in the Report Center grid, click on the report name to open it.

The report opens in a new browser tab. You can now view and explore the data using various features. For more information, see Viewing and exploring data in web reports.

Opening web reports from the Desktop Client

You can open a web report from the Reports Library in the Desktop Client (Excel Client or Windows Client). You can differentiate web reports from other types of Axiom reports using the following icons:

- Web report
- Axiom Intelligence report
- Axiom form
- Spreadsheet Axiom file

To open a web report from the Desktop Client:

1. On the **Axiom** tab, in the **Reports** group, click **Reports** to bring up the Reports menu.

NOTE: In systems with installed products, this feature may be present on a different ribbon tab, such as the **Main** tab.

TIP: You can also open reports from the Explorer task pane or Axiom Explorer.

2. Use the Reports Library folders at the bottom of the menu to navigate to the specific web report that you want to open, and then click on it.

The web report opens in the Web Client using your default browser. You can now view and explore the data using various features. For more information, see Viewing and exploring data in web reports.

Viewing and exploring data in web reports

Once a web report is opened, you may have access to a variety of features to view and explore the data in the report, including filtering, sorting, and drilling.

Drilling data

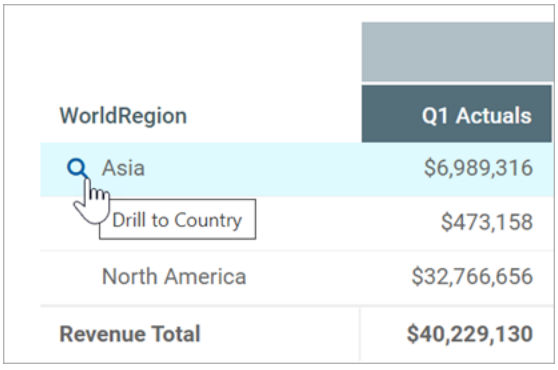
If the web report has been configured to enable drilling, you can drill any data row in the report. Total rows, subtotal rows, and section header rows are not drillable.

To drill a data row:

1. Hover your cursor over the far left column in the report so that a magnifying glass icon appears on the row.

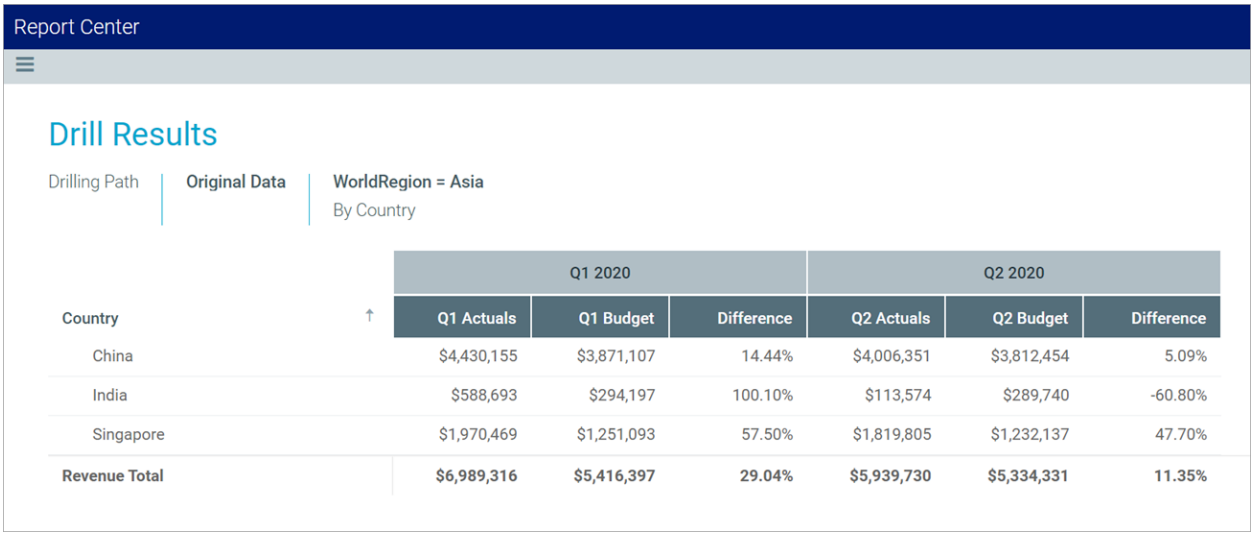
   The tooltip for the magnifying glass will be either "Drill" (if multiple drill paths are available) or "Drill to <path>" (if a single drill path is available). For example, the tooltip will say "Drill to Acct" if the Acct drill path is the only available drill path.

2. Click the icon to drill the row.
   - If multiple drill paths are available, these paths display in a menu when you click the icon. Select the drilling path that you want to view, and that path opens in a new browser tab.
   - If a single drill path is available, that path automatically opens in a new browser tab.



Hover and click to drill

The current row being drilled and the current drill level display at the top of the drill results. You can continue drilling the drill results if additional drill paths are available. Any additional drill results display in the same browser tab instead of opening a new tab. When you are finished viewing the drill results, you can close the browser tab and return to the original report.



Country	Q1 2020			Q2 2020		
	Q1 Actuals	Q1 Budget	Difference	Q2 Actuals	Q2 Budget	Difference
China	$4,430,155	$3,871,107	14.44%	$4,006,351	$3,812,454	5.09%
India	$588,693	$294,197	100.10%	$113,574	$289,740	-60.80%
Singapore	$1,970,469	$1,251,093	57.50%	$1,819,805	$1,232,137	47.70%
Revenue Total	**$6,989,316**	**$5,416,397**	**29.04%**	**$5,939,730**	**$5,334,331**	**11.35%**

Example drill results with drilling path displayed at the top

Adjusting column width and order

You can make minor adjustments to the column display as follows:

- To change the column width, hover your cursor along the right edge of the column header, then drag to make the column thinner or wider.
- To reorder columns, click on a column header and then drag it to a new location. Note that columns cannot be moved in or out of a column group (meaning a set of columns grouped under header text). If a column belongs to a column group, you can change its order within the group but you cannot drag it out of the group. Additionally, row dimension columns cannot be reordered within data columns and vice versa.

Sorting data

If the web report uses a data grid with dynamic rows, then you can sort the data by any column in the grid. To sort the grid by a column, click on the column header. Each click toggles between ascending sort, descending sort, and no sort. If the grid is currently sorted by a column, the sort direction is indicated by an arrow on the column header (up for ascending, down for descending).

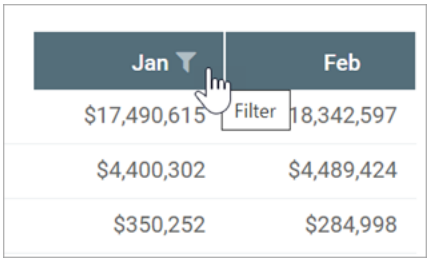
The web report may only allow sorting by a single column, or it may allow sorting by multiple columns. This is configured by the report designer. If the grid uses single-column sorting, then it is not possible to clear the sort on a column. Instead you must click on a different column to change the sort to use that column.

If the web report uses a fixed row structure, then the row values are fixed in position and may not be sorted.

Filtering by column data

If the web report uses a data grid with dynamic rows, you may be able to filter the report by the column data. For example, you might want to filter a column to hide zero-value records, or to show all records above or below a certain value. You might want to filter a dimension column to hide or show certain dimensions (such as departments, accounts, and so on). The report designer determines whether a column is enabled for filtering.

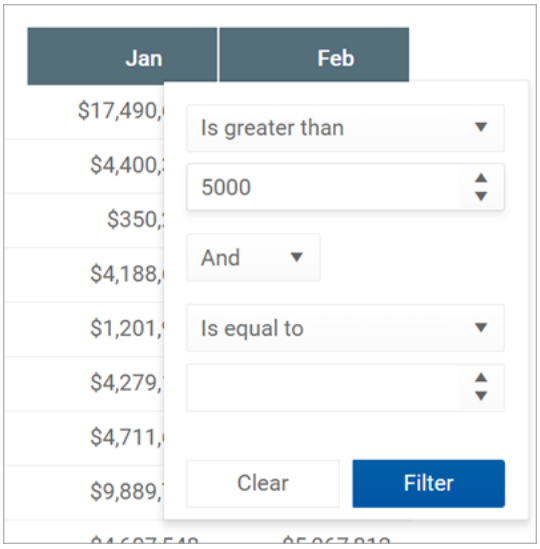
If a column allows filtering, the filter icon displays in the column header when you hover your cursor over the column header.



Filter icon for a column with filtering enabled

To filter the report based on a column:

1. Click the filter icon in the column header to show the filter options.
2. Set the filter options as desired. You can set up to two filter options, combined with either AND or OR.



Example filtering options

3. Click **Filter**.

The report updates to only show records that meet the filter. Additionally, the filter icon in the column header remains visible to indicate that the grid is filtered by this column.

The filter is retained until you clear it, or until the report is refreshed with new data.

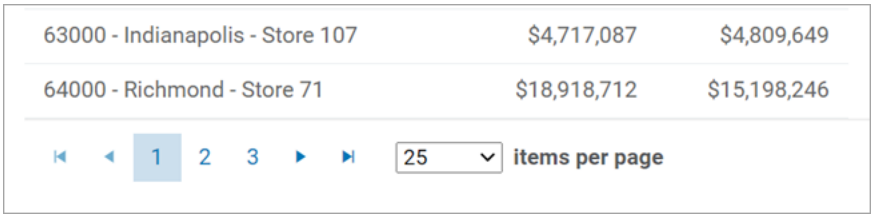
To clear a filter:

1. Click the filter icon in the column header to show the filter options.
2. Click **Clear**.

The grid updates to clear the filter. The filter icon is now only visible when hovering over the column header.

Viewing paged data

If the web report uses dynamic rows, the data is paged to show a specified number of records per page. If the data in the grid exceeds the page limit, you can move between pages using the page controls at the bottom left of the grid.



Page controls for data grids

- Click a page number to move directly to that page.
- Click the single arrow buttons to move one page back or forward.
- Click the double arrow buttons to move to the first page or the last page.

By default, the data grid shows 25 records per page. You can use the drop-down list next to the page controls to change this to 50, 100, or 500 as needed.

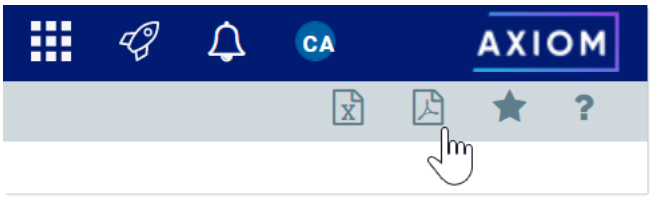
Saving a PDF copy of a web report

You can save a PDF copy of a web report locally, or save it to the Axiom repository.

Any user who can view the report can save a PDF copy to a local folder location. In order to save a PDF copy to the Axiom repository, you must have read/write access to at least one folder in the Reports Library.

To save a PDF copy of a web report:

1. In the Report Center, locate the report in the folder tree and click on the report name to open it.
2. Click the PDF button located in the top right of the gray task bar.



3. In the **Export to PDF** dialog, enter a file name into the **File name** field. By default, the file name is the same as the web report file name.
4. Select the export destination from the **Export to** drop-down:
   - **My computer**: Save the PDF to your computer.
   - **Axiom repository**: Save the PDF to a folder in the Axiom Reports Library.

   NOTES:
   - If you save the PDF to a folder in the Axiom repository, any user with at least read-only access to that folder will be able to view the PDF. You should be sure that it is acceptable for users with permission to the target folder to view the data in the PDF.
   - If you do not have read/write access to any folders in the Reports Library, then the **Export to** option is not available and does not display in the dialog. The PDF will be automatically saved to your computer.
5. If you are saving to the Axiom repository, select an **Output folder**:
   - Click the folder icon to the right of the field.
   - In the **Choose output folder** dialog, select a folder in the Reports Library. The dialog only shows folders where you have read/write access to that folder or a child folder.
   - Click **OK** to choose the folder and return to the **Export to PDF** dialog.

   The path to your selected folder now displays in the **Output folder** field.
6. In the **Configuration Settings** section, select the following:
   - **Layout**: Select the layout for the PDF, meaning the page size. You can choose from the following standard page sizes: **A3**, **A4**, **A5**, **Legal**, **Letter**, or **Tabloid**. Letter is the default layout.
   - **Orientation**: Select the orientation for the PDF, either **Portrait** or **Landscape**. Portrait is the default orientation.
7. Click **Export** to create the PDF.
   - If you are saving to the Axiom repository, and you used a file name that already exists in the target folder, you are prompted to choose whether or not to overwrite the existing file. If you choose not to overwrite, you are returned to the Export to PDF dialog so that you can use a different name and/or output folder.

- If you are saving to your computer, the exact behavior is determined by your browser settings, but in most cases the file is saved directly to the **Downloads** folder on your computer.
- In either case, a notification message displays at the top of the page to indicate whether the PDF creation succeeded or failed.

Export behavior

When you create the PDF, the web report contents are handled as follows:

- If the grid in the web report has paged data, the grid is expanded so that all rows display in the PDF. Column headers do not repeat on multiple pages.
- If you have sorted, filtered, or otherwise changed the data displayed in the report, these changes are not reflected in the PDF. The PDF shows the data in the same state as when the report is initially opened.

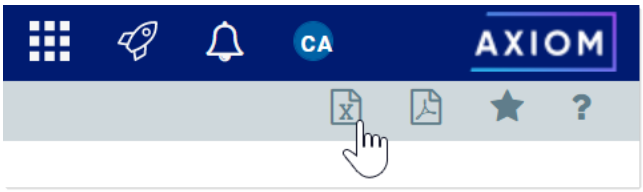
Exporting grid data in a web report to Excel

You can export grid data in a web report to a spreadsheet, so that you can further examine the data using spreadsheet features. You can save the spreadsheet locally, or save it to the Axiom repository.

Any user who can view the report can save the spreadsheet export locally. In order to save the spreadsheet export to the Axiom repository, you must have read/write access to at least one folder in the Reports Library.

To export grid data to an Excel spreadsheet:

1. In the Report Center, locate the report in the folder tree and click on the report name to open it.
2. Click the Excel icon located in the top right of the gray task bar.



3. In the **Export to Excel** dialog, enter a file name into the **File name** field. By default, the file name is the same as the web report file name.
4. Select the export destination from the **Export to** drop-down:
   - **My computer**: Save the spreadsheet to your computer.
   - **Axiom repository**: Save the spreadsheet to a folder in the Axiom Reports Library.

NOTES:

- If you save the spreadsheet to a folder in the Axiom repository, any user with at least read-only access to that folder will be able to view the spreadsheet. You should be sure that it is acceptable for users with permission to the target folder to view the data in the spreadsheet.
- If you do not have read/write access to any folders in the Reports Library, then the **Export to** option is not available and does not display in the dialog. The spreadsheet will be automatically saved to your computer.

5. If you are saving to the Axiom repository, select an **Output folder**:
   - Click the folder icon to the right of the field.
   - In the **Choose output folder** dialog, select a folder in the Reports Library. The dialog only shows folders where you have read/write access to that folder or a child folder.
   - Click **OK** to choose the folder and return to the **Export to Excel** dialog.

   The path to your selected folder now displays in the **Output folder** field.
6. Click **Export** to create the spreadsheet.
   - If you are saving to the Axiom repository, and you used a file name that already exists in the target folder, you are prompted to choose whether or not to overwrite the existing file. If you choose not to overwrite, you are returned to the Export to Excel dialog so that you can use a different name and/or output folder.
   - If you are saving to your computer, the exact behavior is determined by your browser settings, but in most cases the file is saved directly to the **Downloads** folder on your computer.
   - In either case, a notification message displays at the top of the page to indicate whether the spreadsheet creation succeeded or failed.

Export behavior

When the grid data is exported, the behavior is as follows:

- The full data contents of the grid are exported (all rows). Column group headers are omitted from the export.
- By default, the basic number format applied to the column is preserved in the export. The exception is negative numbers, which will always be shown using a minus sign regardless of the configured format. Other formatting (such as background colors and borders) is not applied to the exported data.
- User changes to the grid—such as changing the sort order or filtering a column—are not preserved.

- The export is not supported for use on tablets.

4

Managing Web Reports

Using the Report Center in the Axiom Web Client, you can create, edit, and delete web reports as needed. Web reports are designed to be intuitive for report builders to create, and easy for end users to consume.

Creating new web reports

You can create new web reports using the **Create** button in the Report Center:

- New web report: This option opens the Report Builder so that you can create a new web report from scratch.
- New web report from template: This option creates a new web report based on a template provided by an installed product.

If you want to create a web report that uses a fixed row structure, the fixed row structure must be defined separately and then assigned to the report. Using the Report Center, you can create, edit, and delete fixed row structures. For more information, see Managing Fixed Row Structures.

In order to create a web report, you must be an administrator or have the **Create Web Reports** security permission. You must also have read/write access to at least one folder in the Reports Library.

Editing web reports

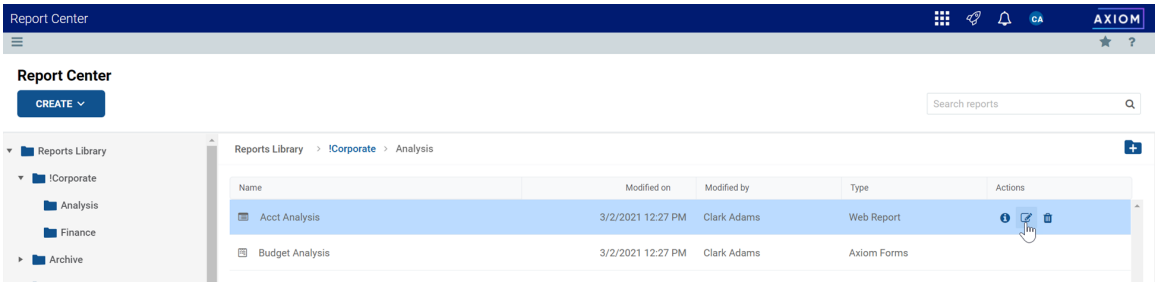
You can open a web report for editing from the Report Center if the report is eligible to be edited, and you have read/write permission to the report.

Only one user at a time can open a web report for editing in the Report Builder. However, other users can continue to view the report as normal.

To edit a web report from the Report Center:

1. In the Report Center, locate the web report that you want to edit. You can use folder navigation to find the report, or use the Search box at the top of the page.

2. Once the web report displays in the Report Center grid, hover your cursor over the **Actions** column to make the action icons visible, then click on the Edit icon .



   If the Edit icon is present but disabled, then you cannot edit this report. This may be because the report belongs to an installed product and cannot be edited, or because you do not have read/write access to the report.

The report opens in the Report Builder, in a new browser tab. You can now edit it as needed. For more information, see Using the Report Builder.

NOTE: Currently, it is not possible to "save as" in the Report Builder. If you want to create a copy of an existing web report, you must use Axiom Explorer in the Desktop Client to copy the file.

Deleting web reports

You can delete a client-created web report if it is no longer needed. You must have read/write access to the report and its folder in order to delete a report. Product-controlled web reports cannot be deleted.

Reports can be deleted from the Report Center in the Axiom Web Client, or from Axiom Explorer in the Axiom Desktop Client.

TIP: If a report is deleted in error, an administrator may be able to restore the report using the **Restore Deleted Files** feature in the Axiom Desktop Client.

To delete a web report from the Report Center:

1. In the Report Center, locate the web report that you want to delete. You can use folder navigation to find the report, or use the Search box at the top of the page.
2. Hover your cursor over the row with the web report, then in the **Actions** column, click the **Delete** icon.

   If the report cannot be deleted, the Delete icon is disabled. This may occur because you do not have the necessary permissions to delete the report, or because the report belongs to an installed product.
3. When you are prompted to confirm that you want to delete the report, click **OK**.

The report is deleted from the system and no longer displays in the Report Center.

To delete a web report from Axiom Explorer:

1. Launch the Desktop Client.
2. Launch the Desktop Client.
3. On the **Axiom** tab, in the **Administration** group, click **Manage > Axiom Explorer**.

   NOTE: If your system uses installed Axiom products, you can access this feature from the **Admin** tab. Click **System Browser** to open Axiom Explorer.

   TIP: You can also use the Explorer task pane to delete a web report.

4. Navigate to the **Reports Library**, and then locate the web report that you want to delete.
5. Right-click the report and then select **Delete**.
6. When you are prompted to confirm that you want to delete the report, click **Yes**.

The report is deleted from the system and no longer displays in Axiom Explorer.

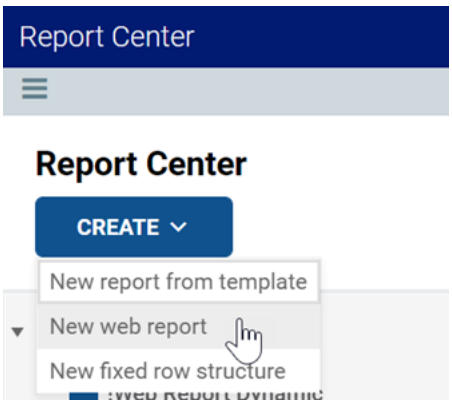
Creating new web reports

Using the Report Center, you can create new web reports from scratch so that you can build the report as needed.

In order to create a web report, you must be an administrator or have the **Create Web Reports** security permission. You must also have read/write access to at least one folder in the Reports Library. If you do not have permission to create web reports, then the option to create a new web report will not be available from the **Create** button in the Report Center. If the **Create** button does not have any available options to display, then the button is hidden entirely.

To create a new web report:

1. In the Report Center, click **Create > New web report**.

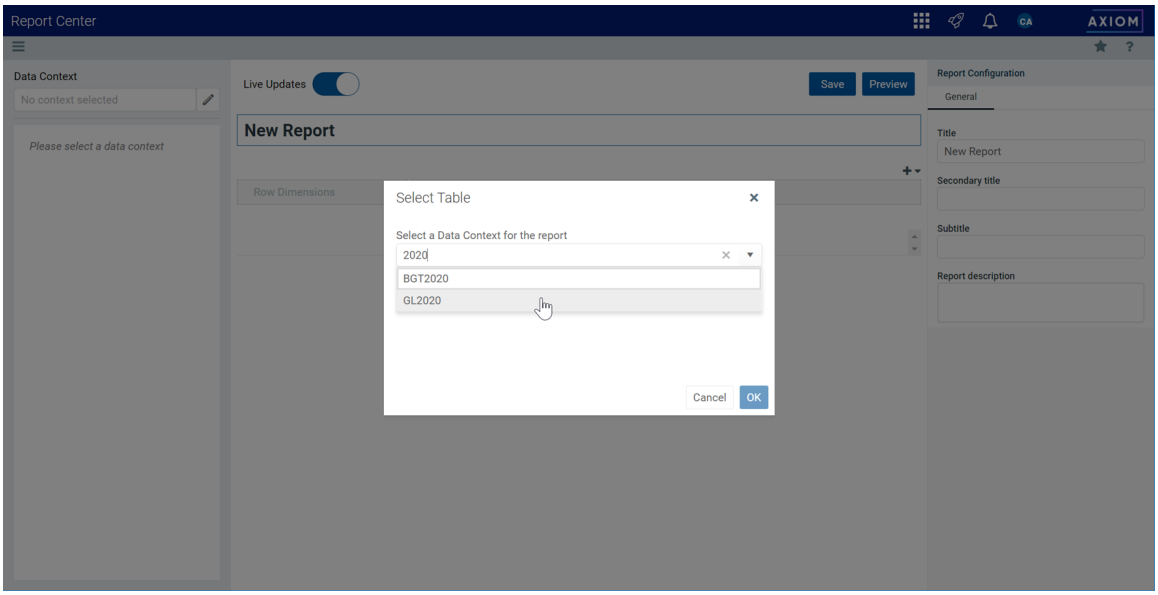


The Report Builder opens in a new tab, displaying a new blank report.

2. In the **Select Table** dialog, select a primary table to determine the data context for the report, then click **OK**.

   You can select a table from the drop-down list directly, or type into the box to search for a table name. The search uses "contains" matching to return any tables that contain the search text within the table name. In the following screenshot, the text `2020` has been used to search for tables with the year 2020 in the name.

   The *data context* determines the overall pool of data that is eligible to be included in the report. The selected primary table determines which other tables are eligible for inclusion in the report, based on lookup relationships. All table columns and filters used in the report must be compatible in the context of the primary table.



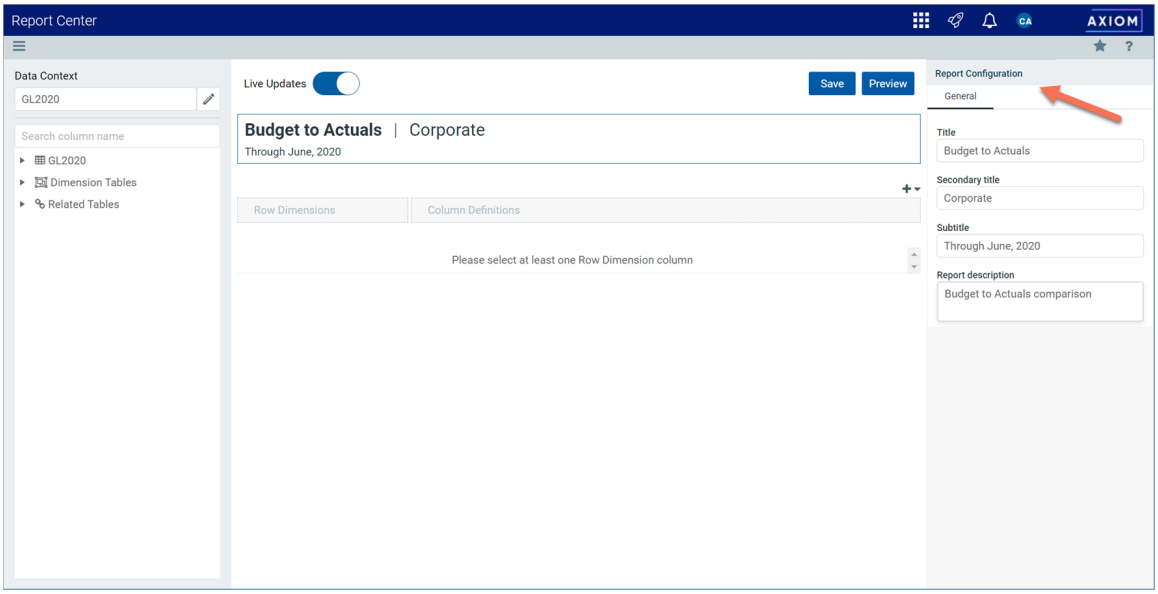
   Although you can click **Cancel** if you are not ready to select a primary table for the data context, most activities in the Report Builder require a data context to be selected.

   Once a table is selected for the data context, you can work with the report in the Report Builder. The Report Builder consists of three main areas as follows:

   - The **Data Panel** on the left side is where you select the data to include in your report.
   - The **Report Canvas** in the middle is where you build the report. Columns can be dragged and dropped from the Data Panel to the Report Canvas. You can also create calculations to display in the report columns, and define column groups.
   - The **Configuration Panel** on the right side is where you define properties for the report, the data grid, and the individual columns. You can configure properties such as report titles, drilling and filtering options, and column formatting.

   For more information on using the Report Builder, see Using the Report Builder.

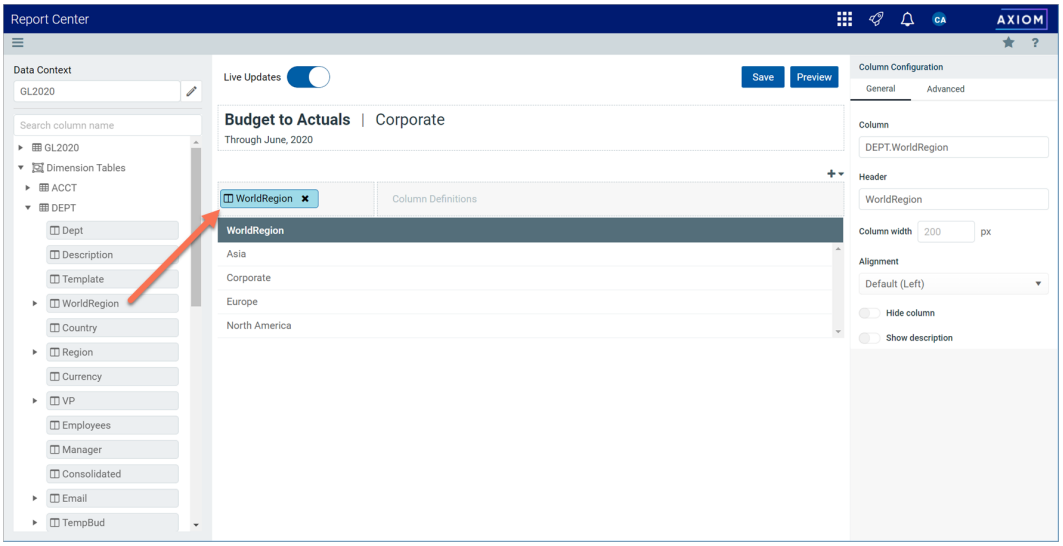
3. In the **Report Configuration** panel along the right side of the page, define the report titles and description as needed. For more information, see Configuring report properties for a web report.



4. Define the rows of the report by doing one of the following, depending on whether you want to generate the rows dynamically or use a fixed row structure:

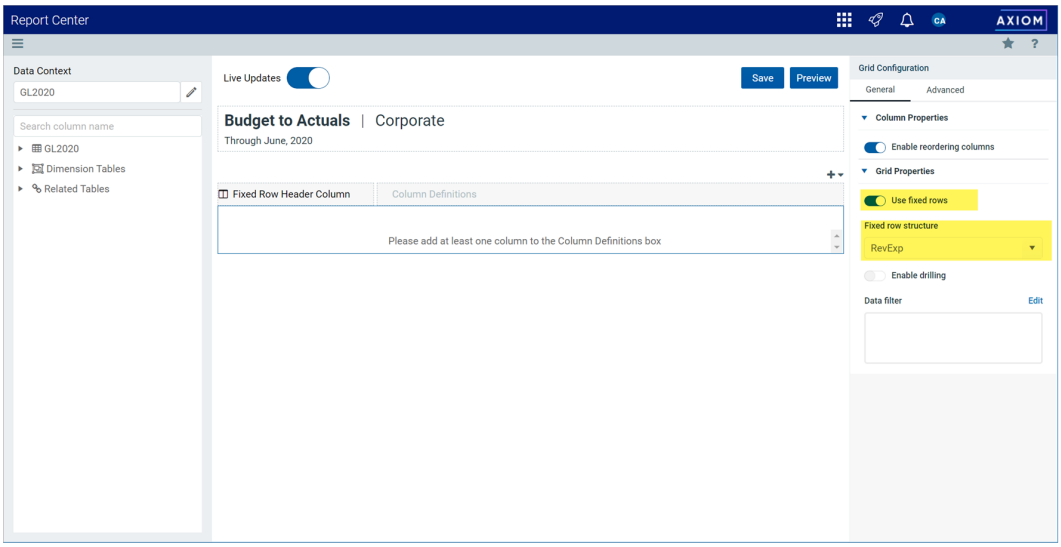
   - **Dynamic rows**: In the Data Panel, locate the table column that you want to use as the row dimension. Drag and drop the column to the **Row Dimensions** box in the Report Canvas.

     Once you drag and drop a column to use as a row dimension, the rows of the report dynamically populate based on the values in that column. For more information, see Specifying the row dimension for a web report.



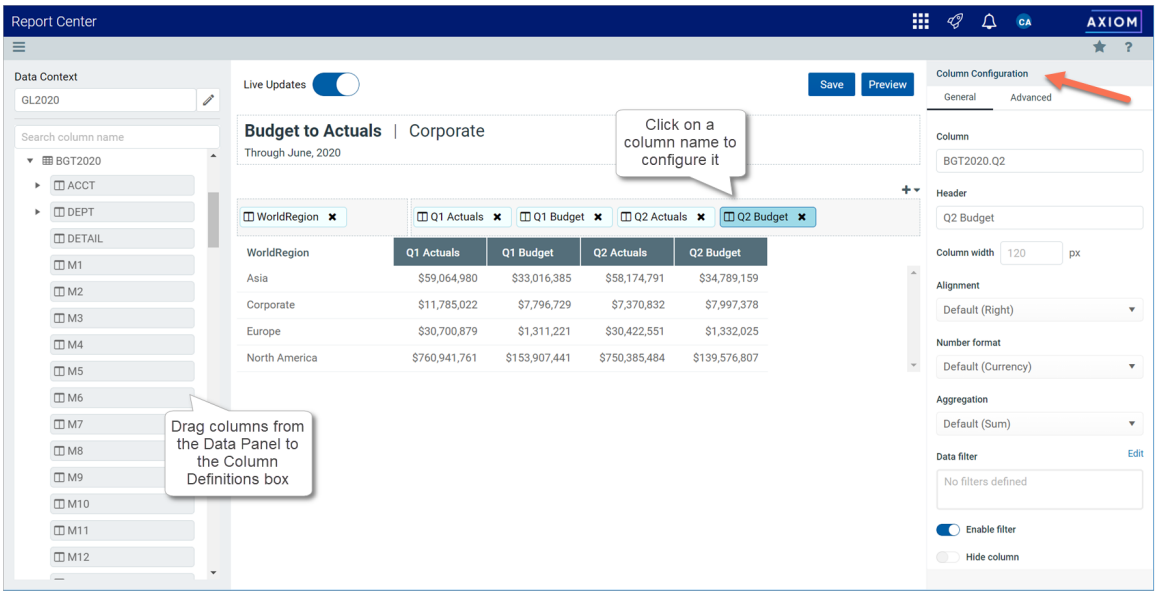
- **Fixed rows**: Select the placeholder text in the Report Canvas so that the **Grid Configuration** properties load into the Configuration Panel. On the **General** tab, enable **Use fixed rows** then select an existing **Fixed row structure**. For more information, see Specifying the fixed row structure for a web report.

  In this case, the rows will not load into the Report Canvas area until at least one data column is added to the Column Definitions box.



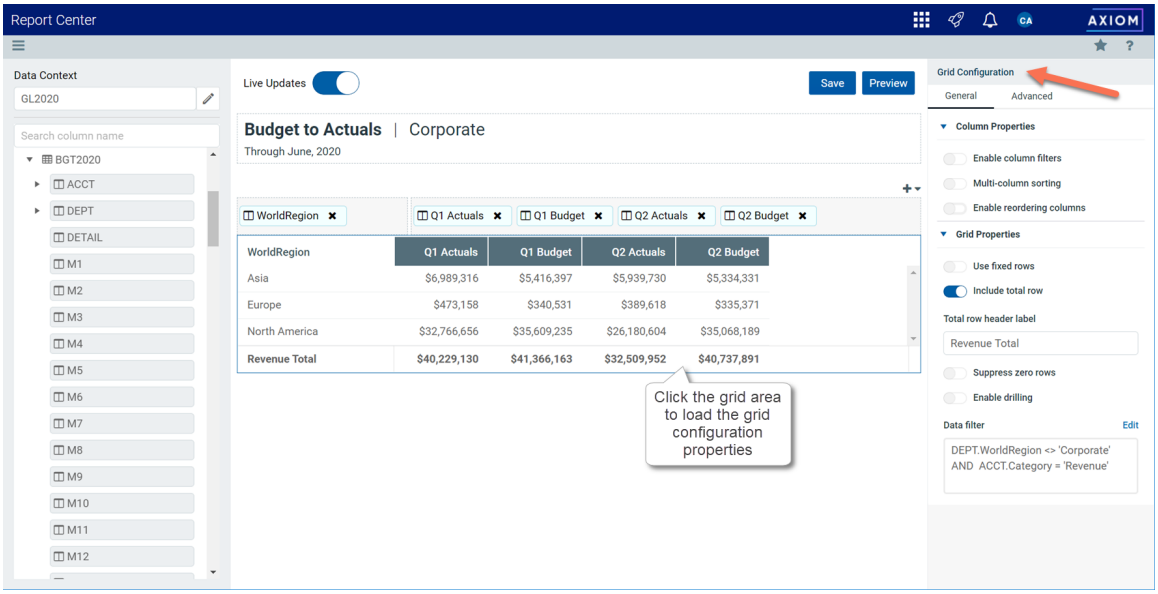
5. Use the Data Panel to locate the data columns that you want to display in the report, then drag and drop those columns out to the **Column Definitions** box in the Report Canvas. Once the columns are added to the grid, you can configure data and display properties for each column.

   For more information, see Adding data columns and calculated columns to a web report and Configuring column properties for a web report.

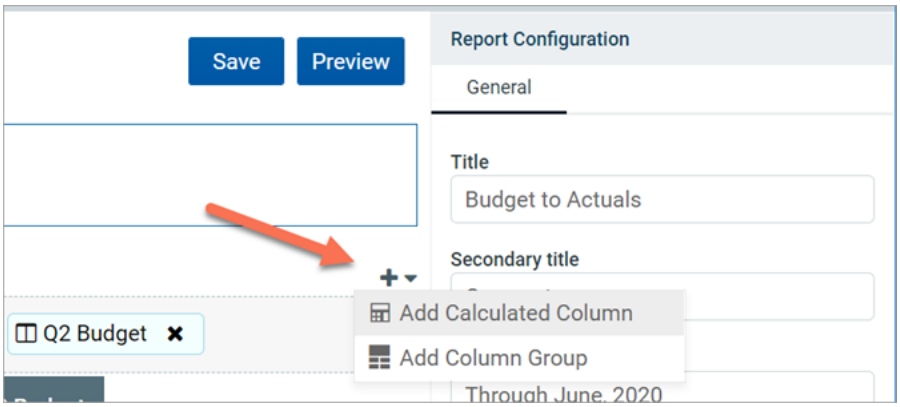


6. Select the grid in the report canvas so that the configuration panel changes to show the **Grid Configuration** settings. Define the grid settings as needed, such as to enable the total row, or define a data filter, or enable drilling options. For more information, see Configuring grid properties in a web report.

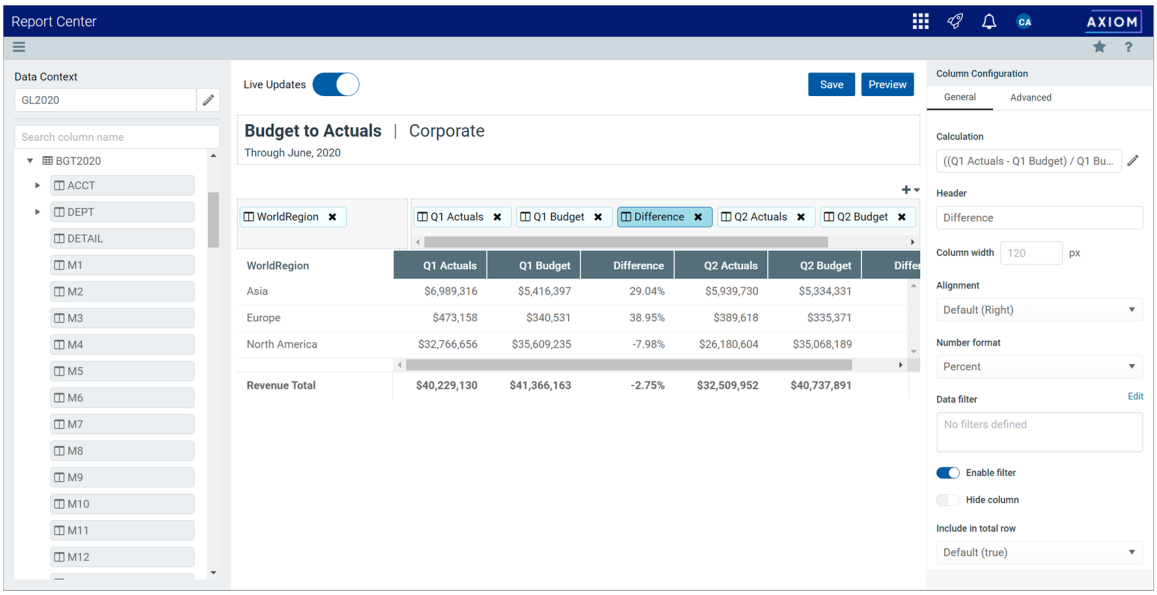
   In the following example, a filter has been defined for the grid which affects both the data displayed in the report and the row values. Additionally, the total row was enabled.



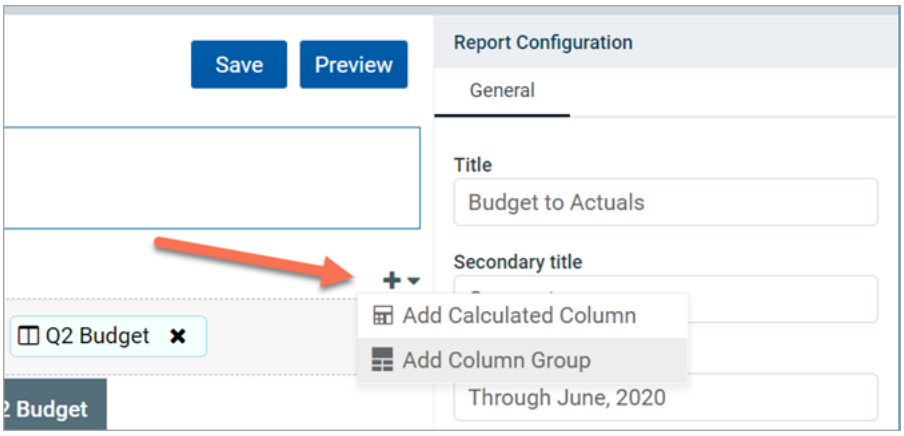
7. Use the plus icon at the top right of the **Column Definitions** box to add calculated columns to the grid as needed. For more information, see Adding data columns and calculated columns to a web report.



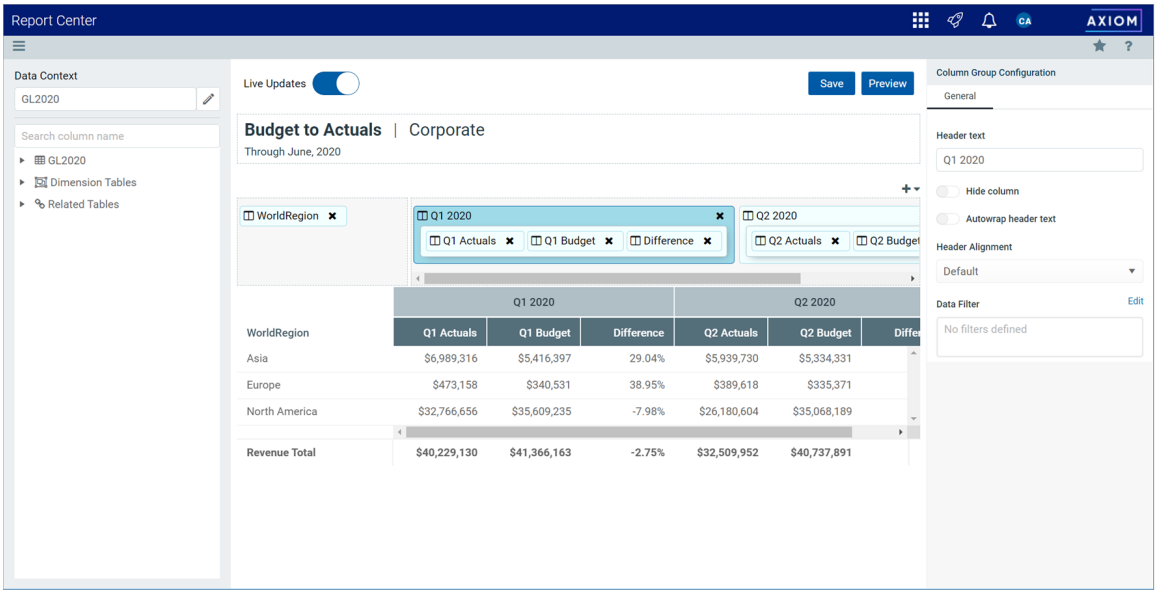
In the following example, two calculated columns have been added to calculate the difference between actuals and budget for each quarter.



8. Use the plus icon at the top right of the **Column Definitions** box to add column groups to the grid as needed. Using column groups, you can display multiple columns grouped underneath a header. For more information, see Defining column groups for a web report.



In the following example, two column groups have been added for Q1 and Q2.



9. Click **Save** to save the report.
10. In the **Save Report As** dialog, complete the following fields and then click **Save**:

Item	Description
File name	The name of the report file. This is the name that users will see in the Report Center.
Description	Optional. A description of the report. Currently, descriptions do not display in the Report Center, but they can be viewed in the Axiom Desktop Client using Axiom Explorer.
Save to folder	The folder in the Axiom repository where you want to save the report. • Click the folder icon to the right of the field. • In the **Choose output folder** dialog, select a folder in the Reports Library. You can only select folders where you have read/write access to the folder. If a folder name displays with a lock icon, this means you have read-only access to that folder and therefore cannot save a new report there. • Click **OK** to choose the folder and return to the save dialog. The path to your selected folder now displays in the field.

If you use a file name that already exists in the target folder, you will be prompted to choose whether or not to overwrite the existing file. If you choose not to overwrite, you are returned to the Save Report As dialog so that you can use a different name and/or output folder.

Keep in mind that many of these steps can be done in any order. You can configure the grid settings before defining report titles, and so on. The main dependency is that you must select a primary table for the data context before you can begin adding columns to the report.

Creating new web reports from template

Using the Report Center, you can create new web reports from a template. Currently, templates are only provided by installed Axiom products. For more information about any templates provided by your installed products, see the separate product documentation.

Some report templates require a fixed row structure to define the row dimensions and sections of the report. If you want to create a new web report from a template that requires a fixed row structure, this row structure must already exist so that you can assign it to the report when you create it. For more information, see Managing Fixed Row Structures.

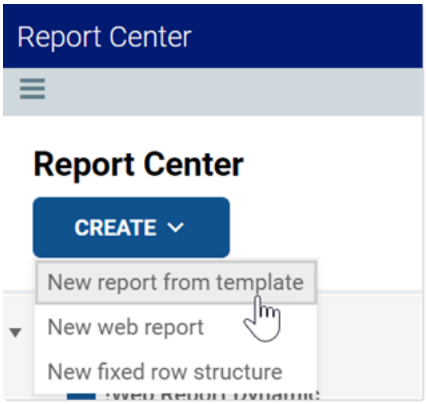
Web reports created from template remain linked to that template. If a template changes, that change is automatically available in all reports created from that template.

In order to create a web report, you must be an administrator or have the **Create Web Reports** security permission. You must also have read/write access to at least one folder in the Reports Library. If you do

not have permission to create web reports, then the option to create a new web report from template will not be available from the **Create** button in the Report Center. If the **Create** button does not have any available options to display, then the button is hidden entirely.

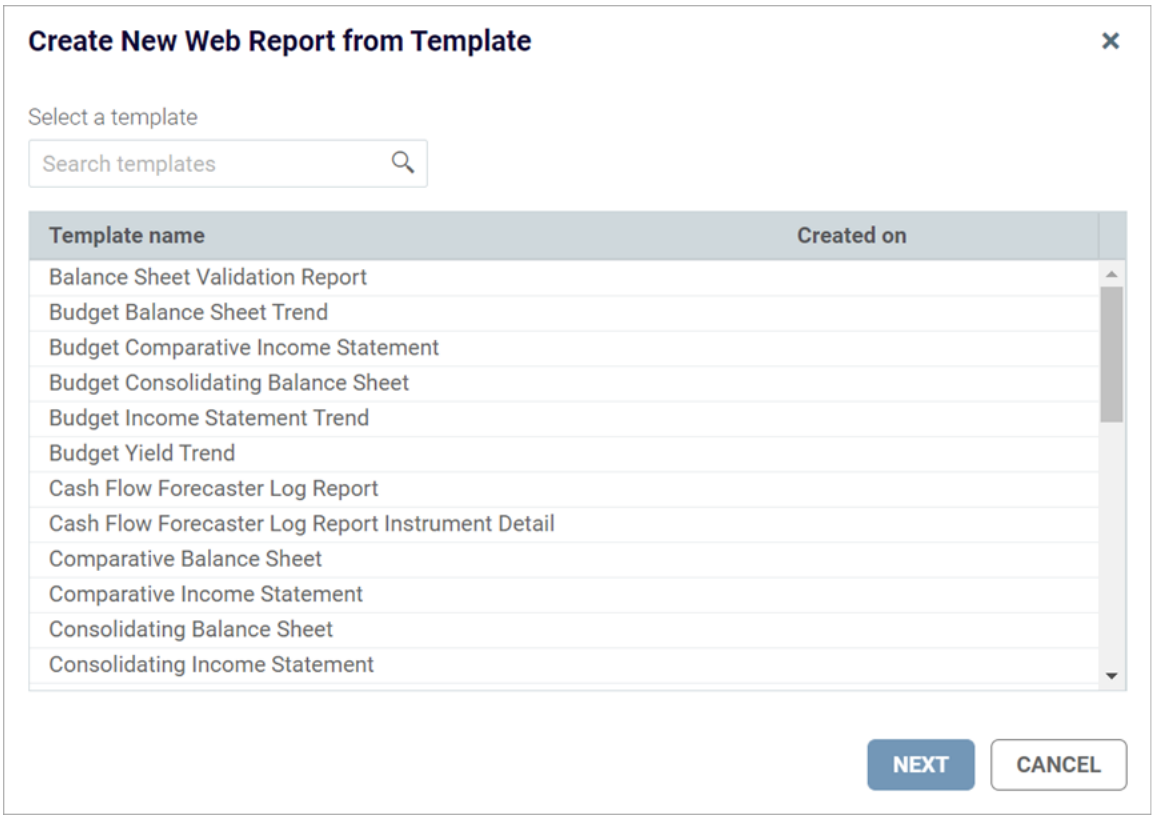
To create a new web report from template:

1. In the Report Center, click **Create** > **New report from template**.



   The **Create New Web Report from Template** dialog opens to walk you through the report creation process.

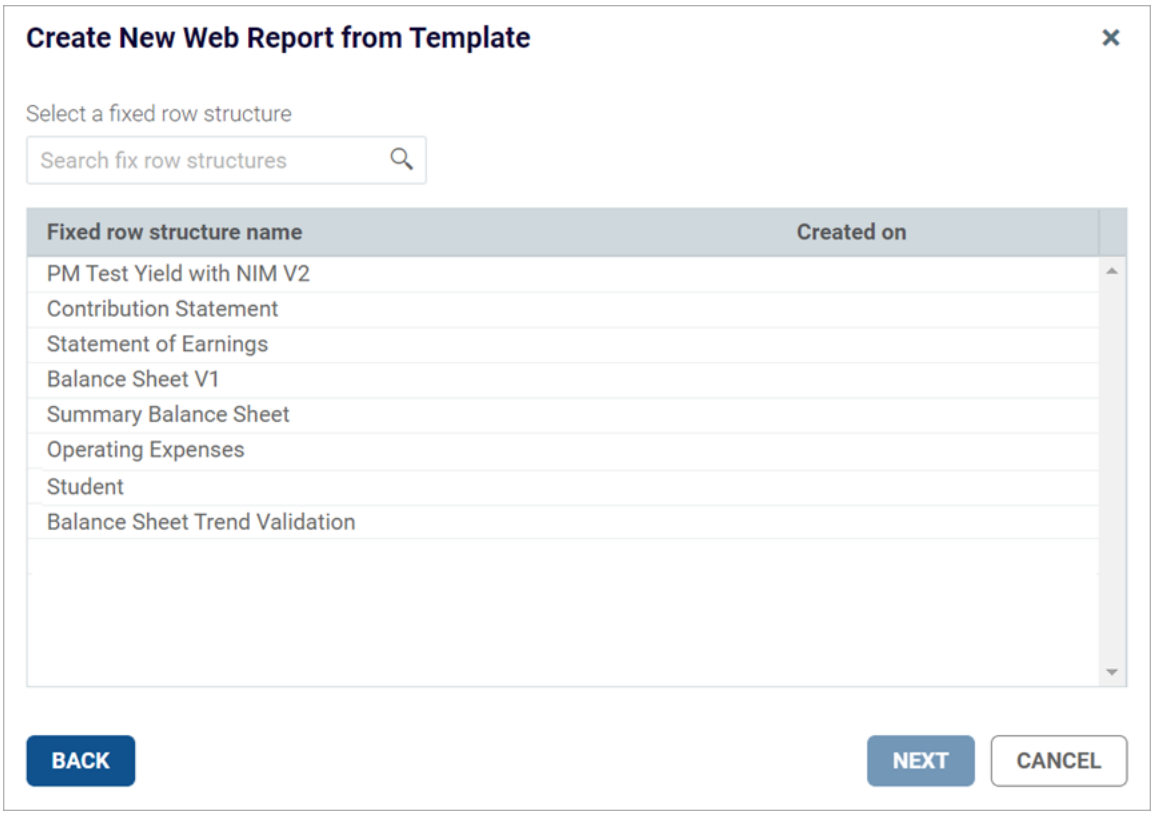
2. On the template screen, select the template that you want to use to create the report, and then click **Next**.



Example template screen showing product-delivered templates

NOTE: If no templates are listed, then your system does not have any available web report templates. You can click **Cancel** to exit the dialog and return to the Report Center.

3. On the fixed row structure screen, select the fixed row structure to use in the report, and then click **Next**. If the template you selected does not use a fixed row structure, then this screen does not display and you can skip to step 4.



NOTE: If no fixed row structures are listed, then your system does not have any available fixed row structures. You must create one before you can create a web report using the selected template. You can click **Back** to select a different template, or you can click **Cancel** to exit the dialog and return to the Report Center. For more information, see Managing Fixed Row Structures.

4. On the final screen, complete the following fields to save the new report, and then click **Create**.

Item	Description
Name	The name of the report file.
Description	Optional. A description for the report.

Item	Description
Save report in	The folder in the Axiom repository where you want to save the report. • Click the folder icon to the right of the field. • In the **Choose output folder** dialog, select a folder in the Reports Library. You can only select folders where you have read/write access to the folder. If a folder name displays with a lock icon, this means you have read-only access to that folder and therefore cannot save a new report there. • Click **OK** to choose the folder and return to the save dialog. The path to your selected folder now displays in the field.

The report is opened in a new browser tab. You can now review the data using a variety of tools available to web reports, such as sorting, filtering, and drilling. For more information, see Viewing and exploring data in web reports.

Once a report is created from template, it cannot be edited—for example, to choose a different fixed row structure. If you want to use a different fixed row structure, create a new report from template again. Remember that any changes to the template or to the fixed row structure will automatically flow through to all reports that use the template or the fixed row structure.

5

Using the Report Builder

Using the Report Builder, you can create and edit web reports using a drag-and-drop interface. Web reports are intended to be intuitive for report builders to create and easy for report viewers to use.

Web reports support two different ways to display reporting data in a grid:

- **Dynamic rows**: Dynamically display data rows based on a specified dimension or grouping.
- **Fixed rows**: Use predefined fixed row structures to organize data rows into sections with headers, totals, and subtotals.

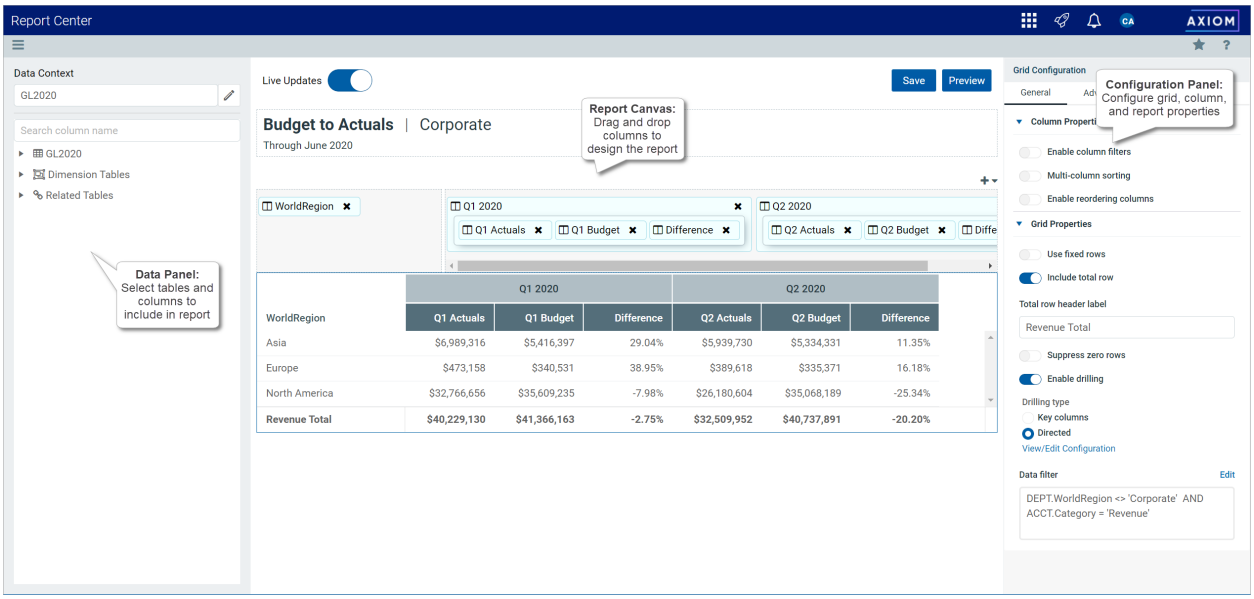
The Report Builder opens when you do either of the following:

- Create a new web report from the Report Center.
- Edit an existing web report from the Report Center.

Overview of Report Builder

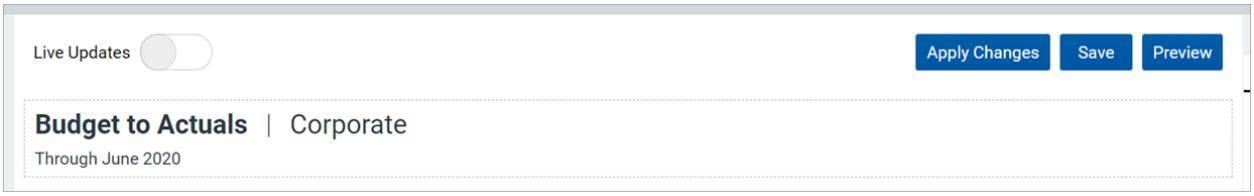
The Report Builder has three main areas:

- The **Data Panel** on the left side is where you select the data to include in your report.
- The **Report Canvas** in the middle is where you build the report. Columns can be dragged and dropped from the Data Panel to the Report Canvas. You can also create calculations to display in the report columns, and define column groups.
- The **Configuration Panel** on the right side is where you define properties for the report, the data grid, and the individual columns. You can configure properties such as report titles, drilling and filtering options, and column formatting.



Overview of the Report Builder

As you build and configure the report, a limited preview of the grid displays in the Report Canvas area, so that you can see the effect of your choices in real time. If you want to work on the report without this live update, you can disable the **Live Updates** toggle at the top of the canvas. When live updates are disabled, a new **Apply Changes** button displays at the top of the canvas. You can use this button to manually refresh the preview (or you can re-enable **Live Updates**).



Report Builder with Live Updates disabled

Building a report in the Report Builder

The following is an overview of how to build a report in the Report Builder:

- Define a data context: Each report must have a specified primary table to determine the data context for the report. Once the data context is defined, you can build the report using columns from the primary table and from related tables.
- Define the grid rows: Web reports can use dynamically generated rows based on a dimension, or they can use a fixed row structure. Do one of the following depending on the type of report that you want to make:
  - For dynamic rows, add a row dimension to the grid by dragging and dropping a table column.
  - For fixed rows, specify a fixed row structure by modifying the grid properties.

- Add data columns and calculated columns: Drag and drop table columns out to the grid to define the data columns for the report, and define calculated columns as needed. You can also define column groups to create grouped headers in the report.
- Configure report properties: Define report title text and an optional report description.
- Configure grid properties: Configure grid properties such as a data filter and user interaction options. This includes enabling and configuring drilling options as needed.
- Configure column properties: Configure properties for each column such as alignment, width, number format, and column filters.

Previewing a report

Although the grid shown in the Report Canvas updates in response to report configuration changes made in the Report Builder, it is not intended to be a fully live representation of the report. If you want to see how the report will appear to end users without leaving the Report Builder, click the **Preview** button at the top of the Report Canvas.

The report preview opens in a separate dialog that overlays the Report Builder. Using this preview, you can try out end-user features like sorting, filtering, and drilling the report. When you are done viewing the preview, click **Close** at the bottom of the dialog to return to the Report Builder.

NOTE: If you drill the report preview, the drill results open in a new browser tab.

Saving a report

Use the **Save** button at the top of the Report Canvas to save the report. If the report is a brand new report, you will be prompted to define a name and folder location for the report. Otherwise, the existing report is saved.

If you have made changes to the report but have not yet saved, you will be prompted to save when you attempt to close the browser tab or navigate to a new location.

NOTE: Currently, it is not possible to "save as" in the Report Builder. If you want to create a copy of an existing web report, you must use Axiom Explorer in the Desktop Client to copy the file.

Defining the data context for a web report

The *data context* for a web report determines the overall pool of data that is eligible to be included in the report. To define the data context, you select a *primary table* as the "base" table for the report. This primary table then determines which other tables are eligible for inclusion in the report, based on lookup relationships. All table columns and filters used in the report must be compatible in the context of the primary table.

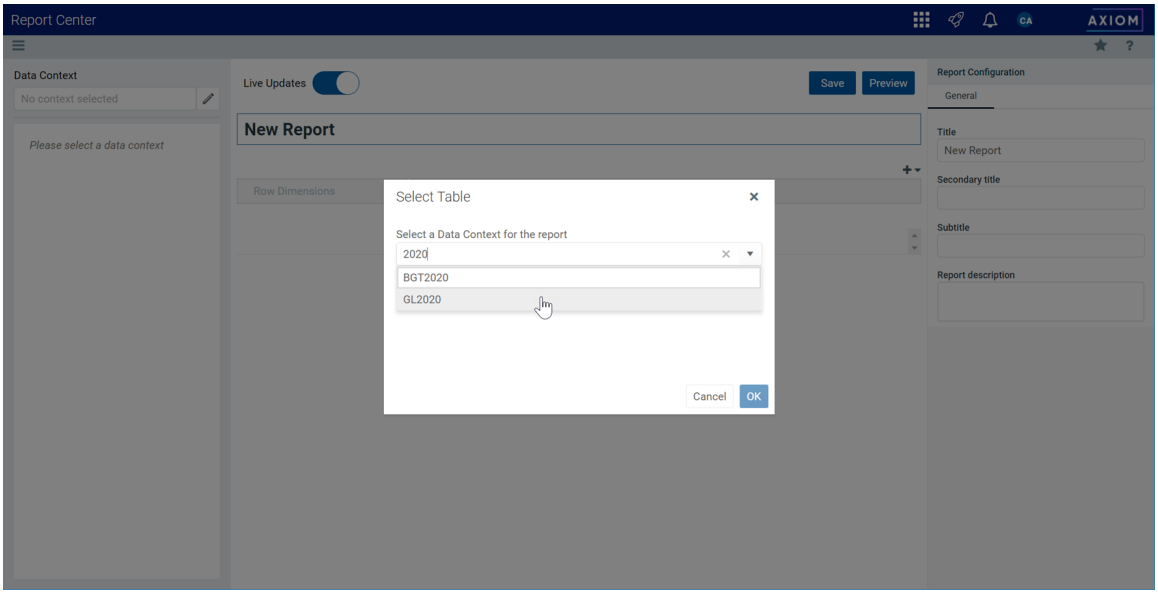
In the Report Builder, the primary table for the data context is specified in the left-hand Data Panel. You must select the primary table before you can drag and drop any table columns out to the grid.

To select a primary table for the data context:

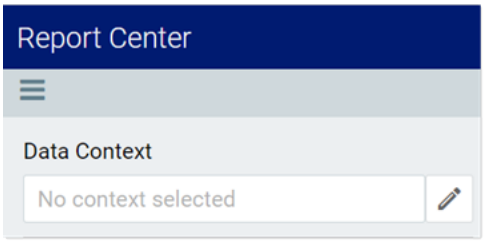
There are two ways to select a primary table for the data context.

- When you create a brand new report, you are automatically prompted to select a primary table for the data context.

  You can select a table from the drop-down list directly, or type into the box to search for a table name. The search uses "contains" matching to return any tables that contain the search text within the table name. In the following screenshot, the text `2020` has been used to search for tables with the year 2020 in the name.



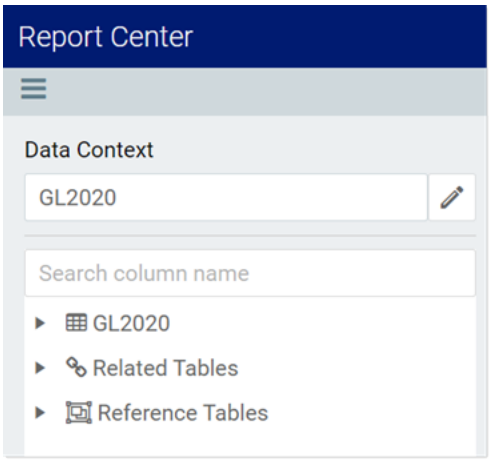
- If you are already in the Report Builder, then you can define or change the primary table using the **Data Context** box at the top of the Data Panel. Click the Edit icon to open the **Select Table** dialog (as shown in the previous screenshot).



Once you have selected a table, that table name is shown in the **Data Context** box, and the Data Panel populates to show a table tree in three expandable/collapsible sections:

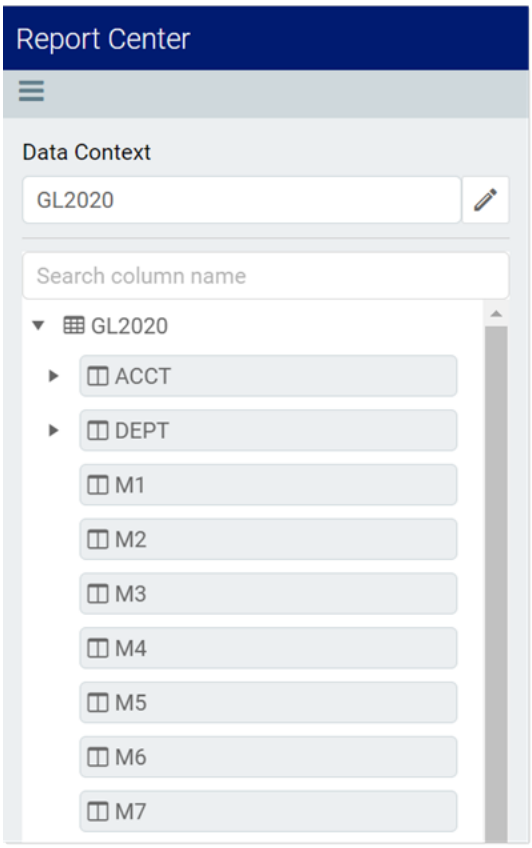
- ***TableName***: The selected table and its columns. This table is the primary table.

- **Dimension Tables**: Reference tables that the primary table looks up to. If the reference tables have lookups to other reference tables, these multi-level reference tables are accessible through the first-level reference tables.
- **Related Tables**: The contents of this section depend on the type of table selected as the primary table.
    - If the primary table is a data table, then this section contains other tables that look up to one or more of the same reference tables as the primary table.
    - If the primary table is a reference table, then this section contains tables that look up to the reference table.



Example Data Panel with a defined data context

You can expand these tables to view the columns, and then drag and drop columns out to the Report Canvas area so that they can be used as row dimensions or data columns.



In this example, we have selected GL2020 as the primary table. GL2020 is a data table that looks up to reference tables Dept and Acct. The table tree is populated as follows:

- **GL2020**: This node contains all columns in GL2020, as well as columns in the lookup tables Dept and Acct.
- **Dimension Tables**: This node contains the lookup reference tables Dept and Acct. If the reference tables look up to other downstream reference tables (multi-level lookups), those downstream reference tables can be used through these tables.
- **Related Tables**: This node contains other tables that also look up to Dept or Acct (or to a multi-level lookup through Dept or Acct). This may include tables such as GL2021, BGT2021, and BGT2020.

When you save the report, the data context is saved for that report and will be reloaded into the Data Panel whenever the report is opened in the Report Builder.

NOTES:

- When choosing the data context, the list of tables is automatically filtered to only show tables that you have access to. If you have the **Administer Tables** security permission, all tables will be shown. This means it can be possible to select a primary table where you do not have access to any of the data in the table. You can build the report but it will not populate with data.
- Certain tables can be restricted from showing the in the Report Builder using the system configuration setting **TablesRestrictedFromReportWriter**. If a table that you have access to is not available, it has likely been restricted using this setting.

Changing the data context

You can change the data context freely until you have done either of the following:

- Dragged and dropped columns out to the grid setup boxes in the Report Canvas
- Selected a fixed row structure for use with the report (when using the **Use fixed rows** option in the Grid Configuration properties)

You can still change the data context if needed, but any newly selected primary table must be compatible with the table columns you have already added to the grid, and with the fixed row structure you have selected (if applicable). If the newly selected primary table is not compatible, an error will occur when the Report Builder tries to refresh the grid in the Report Canvas. At this point you have the choice of selecting a different primary table that is compatible (which may mean returning to the original primary table), or removing the incompatible columns from the grid, or choosing a different fixed row structure.

Other settings that must be compatible with the primary table include the Data Filter for the grid or for any of the columns, and any columns selected as drilling columns for a Directed drilling configuration. If you change the primary table and any of these settings are incompatible with the new primary table, an error will occur.

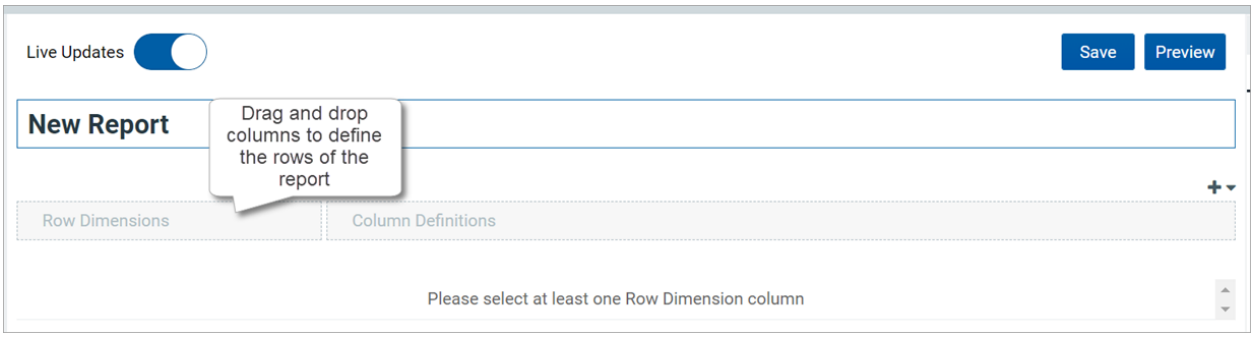
If you change the data context and save the report, the new primary table is now saved for the report and will be reloaded into the Data Panel whenever the report is opened in the Report Builder.

Specifying the row dimension for a web report

The row dimension for a web report defines the summation level for the row data. For example, you may want the rows in your grid to show data by department, region, entity, account, or some combination of dimensions. You specify a table column to use as the row dimension, and then the rows in the grid are dynamically generated based on the unique values in that column.

NOTE: If you want your report to use a static row structure with multiple sections instead of dynamically generating the rows, then use a fixed row structure instead of a row dimension.

The row dimension for the report is placed in the left-hand box at the top of the Report Canvas, known as the **Row Dimensions** box. The report grid cannot render until you specify either a row dimension or a fixed row structure.



Row Dimensions box at the top of the Report Canvas

Web reports can have multiple row dimensions. If two or more row dimensions are specified, then each row in the report represents a unique combination of the dimensions. For example, if the row dimension is just Dept, then each row shows data for a department. If the row dimension is Dept and Acct, then each row shows data by the unique combinations of department and account.

To specify a row dimension for a web report:

1. In the Data Panel of the Report Builder, expand the table tree until you locate the column that you want to use as a row dimension.

   If the Data Panel is empty, this means you must select a primary table first.

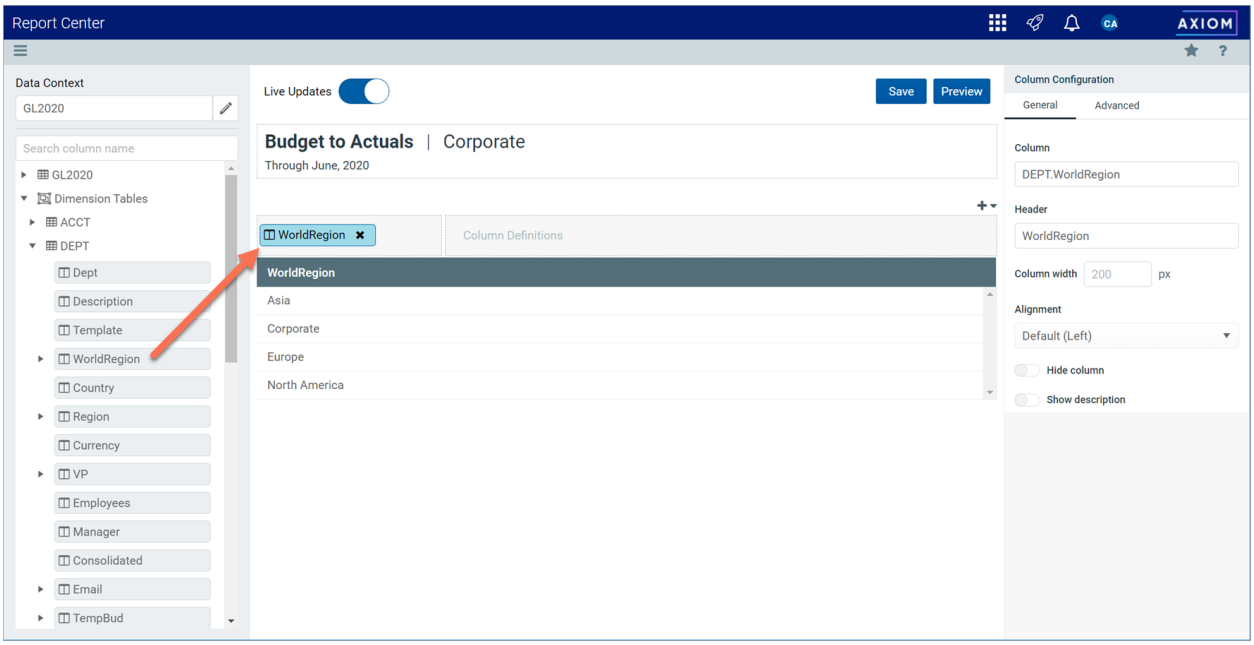
2. Drag and drop the column to the **Row Dimensions** box at the top of the Report Canvas.

   The grid in the canvas updates to show items from the specified row dimension.

3. Select the column name in the Row Dimensions box, and then use the **Column Configuration** panel to configure display properties such as column width, alignment, header text, and formatting. For more information, see Configuring column properties for a web report.

4. If multiple columns are present in the Row Dimensions box, you can drag and drop them within the box so that they display in the desired order within the grid.

Once a row dimension is specified, the grid in the Report Canvas updates to show values from that column. Additionally, the Data Panel updates to remove any tables that are incompatible with the specified row dimension. You can now build out the data columns of the report by dragging and dropping columns from the Data Panel, and by creating calculated columns. For more information, see Adding data columns and calculated columns to a web report.



Defining a row dimension for a web report

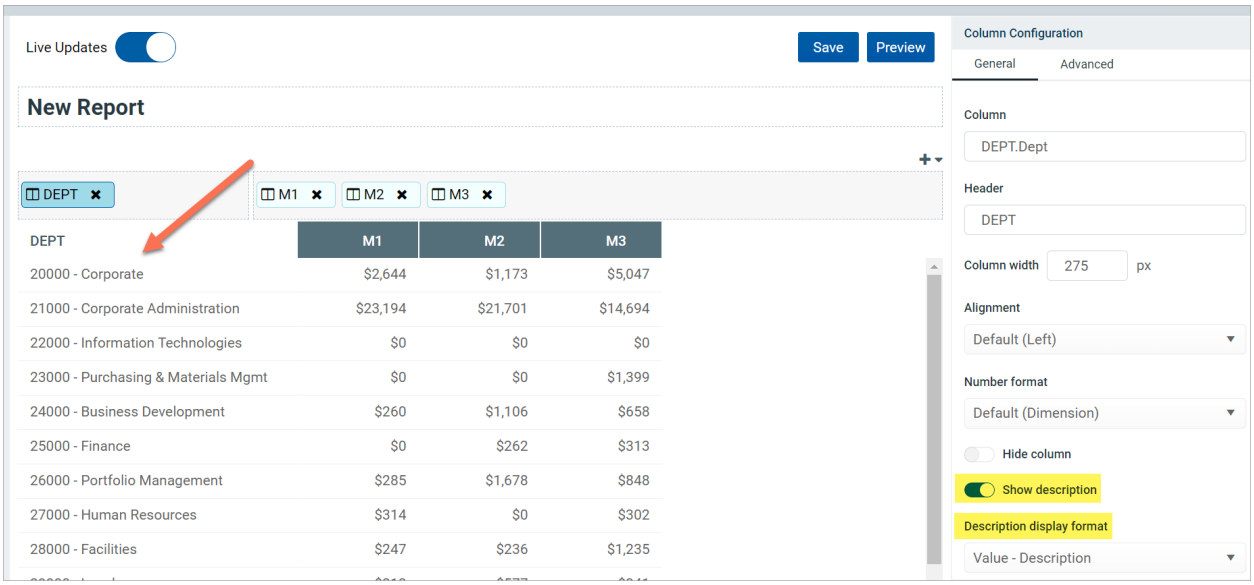
Displaying descriptions for the row dimension

In many cases your row dimension will be a code, such as a department code or an account code, and you want to display the description for the code next to it.

To display descriptions on a dimension column:

1. Select the row dimension column in the **Row Dimensions** box.
2. In the **Column Configuration** settings, on the **General** tab, enable **Show description**.
3. From the **Description display format** list, select the desired display format.

In the following example, the Dept column has been configured to show descriptions using the **Value - Description** format. If you select a format that shows descriptions first, such as **Description (Value)**, then the rows will be sorted by the descriptions instead of the underlying values.



Example row dimension column configured to show descriptions

Although you can add the description column to the grid as a separate column instead of using the **Show description** option, this may not always achieve the desired results. For example:

- If you add the description column as a row dimension, then it will display next to the dimension values but it will cause the data to be additionally grouped by the description values. This is not recommended because the additional grouping is unnecessary, and in some cases may not produce the desired results (for example, if descriptions are not unique).
- If you add the description column as a regular column, then the descriptions will not be frozen next to the dimension codes for scrolling purposes.

Filtering the row dimension

In some cases you want the report to display a subset of values from the row dimension column, instead of all values. To filter the row dimension values, use the Grid Configuration properties to define a **Data Filter** for the grid.

For example, if the row dimension is Dept but you want the report to only display departments that belong to a specific entity, define a grid-level data filter such as `Dept.Entity='Entity 1'`. This will filter the grid so that it only shows data that belongs to Entity 1, including the row dimension values. Department codes that do not belong to Entity 1 will not be included in the data query.

Changing the row dimension

You can change the row dimension at any time by dragging and dropping additional columns to the **Row Dimensions** box, or by removing existing row dimensions.

To remove a row dimension, click the **X** icon to the right side of the column name. If you remove the only row dimension, the grid in the Report Canvas cannot be rendered until you specify a new one.

If you change the row dimension after adding data columns and calculated columns, or if you change the primary table after specifying a row dimension, it is possible that some of the selections may be incompatible with each other. In this case, an error will display when the Report Builder attempts to refresh the data in the Report Canvas. You may have to remove incompatible columns, change the row dimension, or change the primary table in order to restore a valid grid configuration.

If you decide that you want to change the report to use a fixed row structure instead of a row dimension, use the **Grid Configuration** properties to enable fixed rows and then choose a fixed row structure. For more information, see Specifying the fixed row structure for a web report. Any columns currently placed in the Row Dimensions box will be ignored while fixed rows are enabled for the report.

Specifying the fixed row structure for a web report

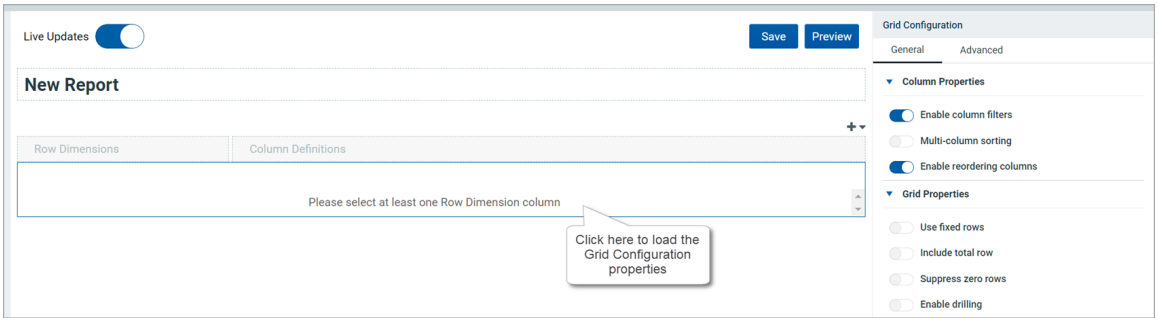
Web reports can optionally use fixed row structures to define the data sections in the report. Instead of dynamically generating the rows based on a table column, fixed row structures individually define each row of data, including section headers, subtotals, and totals.

Fixed row structures are defined separately so that you can reuse them in different web reports, and so that you can update the row structure in one place and have the changes propagate to all reports that reference the fixed row structure. The fixed row structure that you want to use in the web report must already exist—they cannot be created or edited in the Web Report Builder. For more information, see Managing Fixed Row Structures.

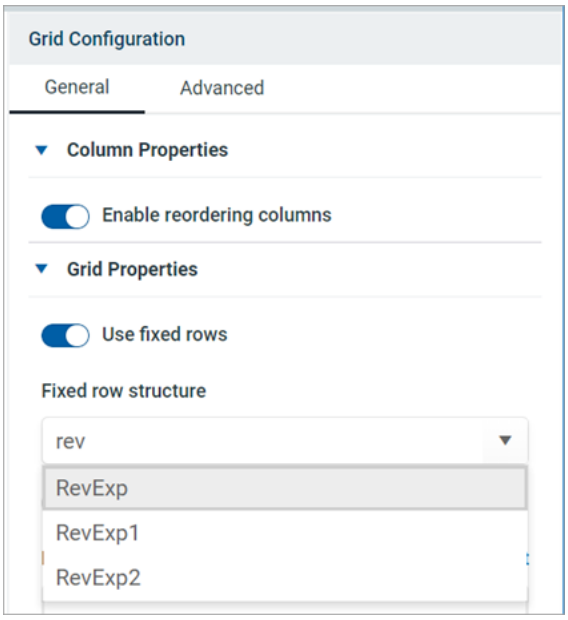
The fixed row structure is specified in the Configuration Panel, using the **Grid Configuration** properties.The grid in the Report Canvas cannot render until you specify either a fixed row structure or a row dimension.

To specify a fixed row structure for a web report:

1. In the Report Canvas of the Report Builder, click the grid area below the column setup boxes. This area displays with placeholder text until either a row dimension or a fixed row structure is specified.

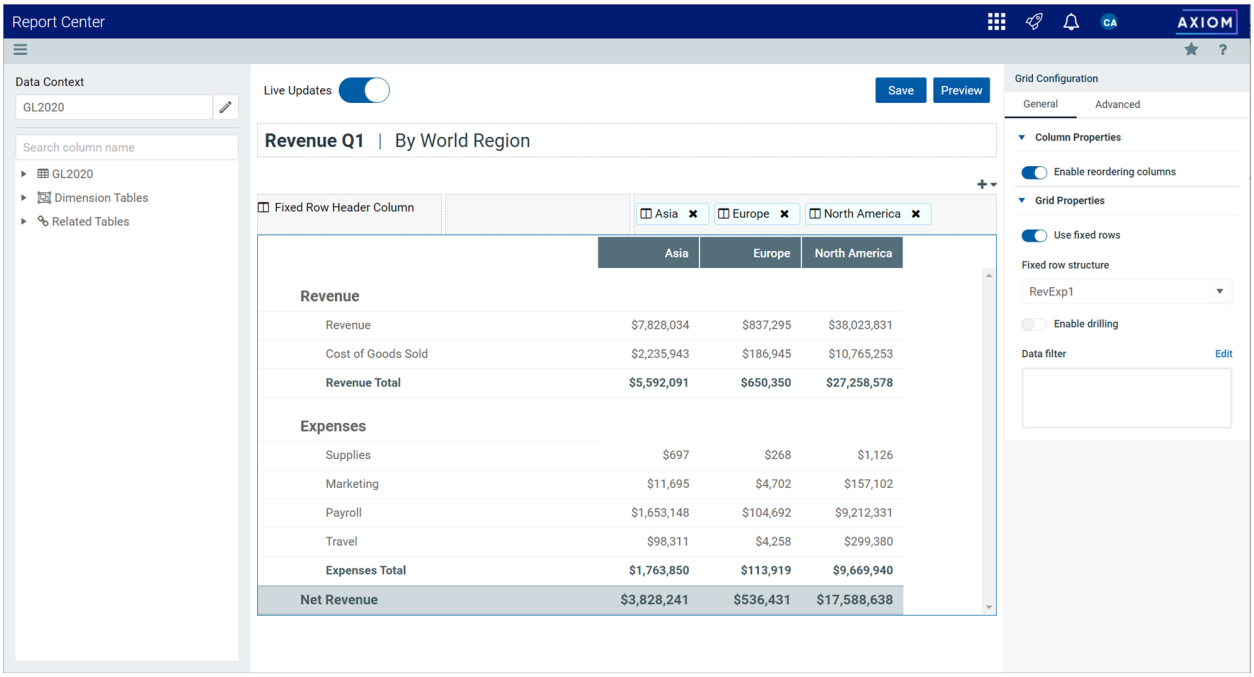


2. In the **Grid Configuration** properties, enable **Use fixed rows**.
3. From the **Fixed row structure** drop-down list, select an existing fixed row structure. You can type into the box to filter the list by name.



After selecting a fixed row structure, the Report Canvas area updates as follows:

- The Row Dimensions box updates to show a placeholder column named **Fixed Row Header Column**. This column is the column that holds the section titles and data row labels as defined in the fixed row structure. You can select this placeholder column in order to configure certain display details about this column within the web report.
- Once you have dragged and dropped at least one data column to the Column Definitions box, the grid updates to show the sections and rows as defined in the fixed row structure.



NOTES:

- If you want to make changes to the fixed row structure, you must edit the structure in the separate fixed row structure editor. Any changes made to the row structure will automatically apply to any web report that uses the fixed row structure.
- If you decide that you want to use dynamically generated rows instead of a fixed row structure, you can simply disable **Use fixed rows** and then drag a column to the Row Dimension setup box. For more information see Specifying the row dimension for a web report.

Impact on Grid Configuration options

When **Use fixed rows** is enabled for the grid, multiple grid configuration options become unavailable because they do not apply to web reports that use fixed row structures. If these options were configured before fixed rows were enabled for the grid, the configuration will be ignored.

- **Enable column filters**: End users cannot filter columns when using fixed rows.
- **Multi-column sorting**: End users cannot sort columns when using fixed rows.
- **Include total row** (and related settings): This option does not apply because fixed row structures have their own defined subtotal and total rows.
- **Suppress zero rows**: This option does not apply to fixed row structures; all configured rows will display regardless of whether they return all zero data.

Configuring the Fixed Row Header Column

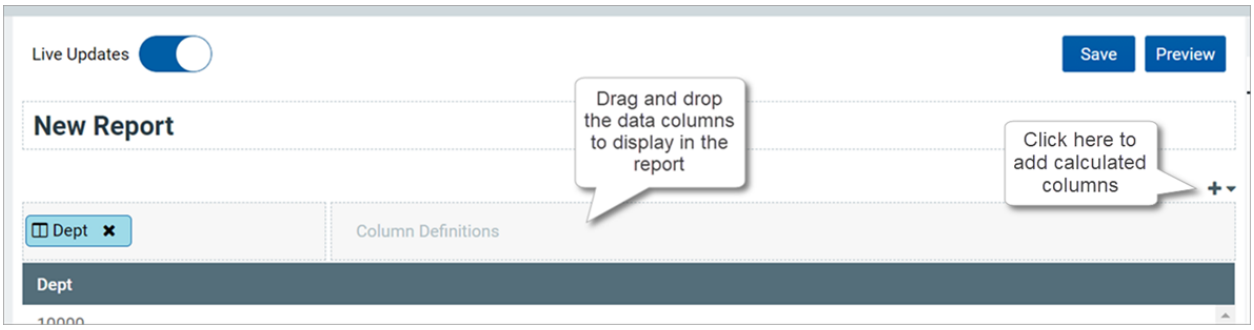
Most of the display details for the Fixed Row Header Column are configured within the fixed row structure and therefore cannot be changed within the web report. However, if you select the **Fixed Row Header Column** item in the Row Dimension setup box, you can configure the following:

Item	Description
Column width	The column width of the column in the grid, in pixels. Enter the desired column width as a whole integer between 20 and 1000. The default width of the Fixed Row Header Column is 200.

Adding data columns and calculated columns to a web report

When creating a web report, you can add as many columns as needed to define the data that you want to display in the report. You can also define calculated columns, such as to show the difference between two columns.

The data columns and calculated columns for the grid are placed in the right-hand box at the top of the Report Canvas, known as the **Column Definitions** box. This box defines the columns to display in the report. Although it is possible to add columns and calculated columns to the Column Definitions box before specifying a row dimension or a fixed row structure, the grid in the Report Canvas will not populate until the rows are defined.



Column Definitions box at the top of the Report Canvas

Adding data columns

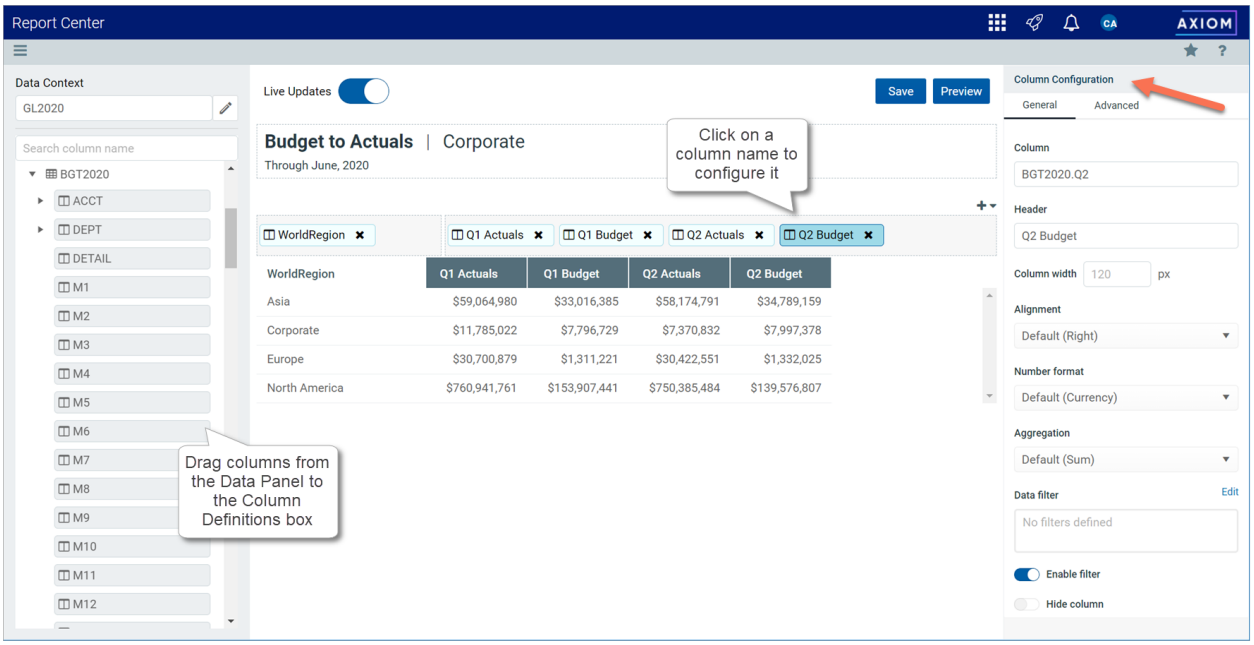
To display data in the report, you can drag and drop table columns from the Data Panel to the Column Definitions box in the Report Canvas. The Data Panel displays the tables and columns that are eligible to be included in the report, based on the selected data context (primary table) and the specified row dimension.

To add a data column to a web report:

1. In the Data Panel of the Report Builder, expand the table tree until you locate the column that you want to add to your report. You can also use the search box at the top of the panel to find a particular column by name.
2. Drag and drop the column to the **Column Definitions** box at the top of the Report Canvas.

   The preview grid in the canvas updates to show data from the specified column.
3. If the column is not in the desired location within the grid, drag and drop it within the Column Definitions box to reorder the columns.
4. Use the **Column Settings** in the Configuration Panel to configure display properties for the column, such as column width, alignment, header text, and formatting. For more information, see Configuring column properties for a web report.

   By default, when you drag and drop a column to the grid, that column is selected and its column properties display in the Configuration Panel. You can return to the column properties at any time by clicking the column name in the Column Definitions box.



Example web report after dragging and dropping data columns

As you drag and drop data columns to the grid, the preview grid in the Report Canvas updates to show data for that column, using the specified row dimension or fixed row structure.

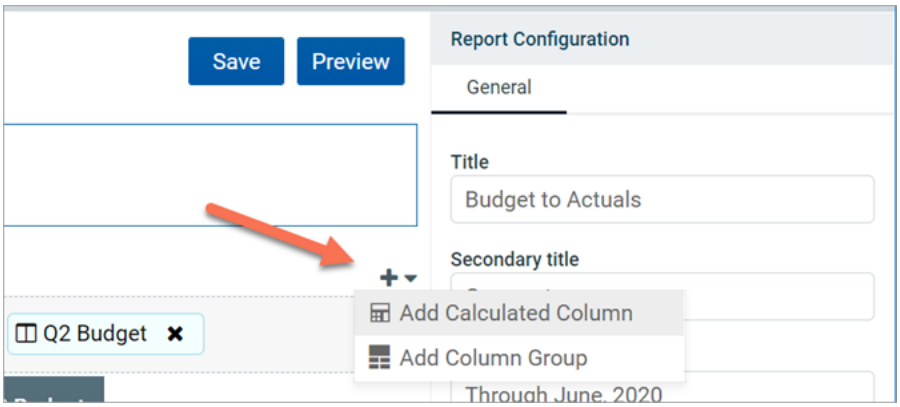
NOTE: If **Use fixed rows** is enabled for the grid, currently the Report Builder does not dynamically update the tables listed in the Data Panel based on the specified fixed row structure. If you drag and drop a column from a table that is not valid in the context of the fixed row structure, a generic error will occur when the Report Builder attempts to populate the grid.

Adding calculated columns

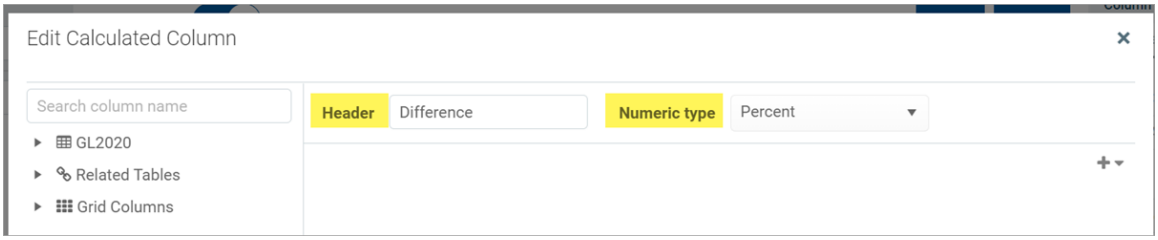
Calculated columns can be used to display totals, differences, percentages, and other calculations within a column of the report. Calculations can be based on columns from related tables that are eligible to be included in the report.

To add a calculated column to a web report:

1. In the Report Canvas of the Report Builder, click the plus sign in the top right corner of the **Column Definitions** box, and then click **Add Calculated Column**.



2. At the top of the **Add Calculated Column** dialog, define the following properties:
   - **Header**: Enter the column header text for the calculated column. This is effectively the name of the calculated column. By default, the header text is "Calculation".
   - **Numeric type**: Select the desired numeric type for the calculated column. If this is left at **Default**, the default numeric type for calculated columns is currency.



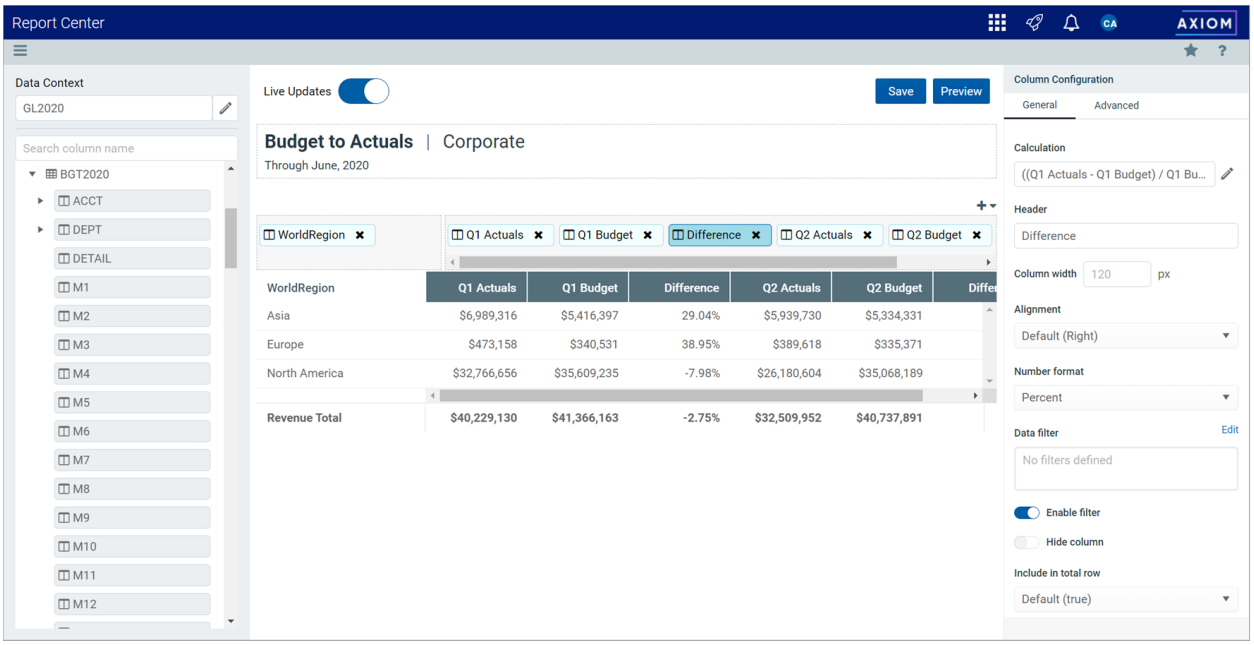
   You can change these properties later using the Column Configuration properties in the Configuration Panel.

3. To create the calculation, drag and drop columns from the table tree on the left to the calculation canvas. See Defining calculations for more information.
4. When you are finished creating the calculated column, click **OK**.

   The calculated column is added to the Column Definition box, and the preview grid in the canvas updates to show the calculated data.
5. If the calculated column is not in the desired location within the grid, drag and drop it within the Column Definition box to reorder the columns.
6. Use the **Column Configuration** properties in the Configuration Panel to configure display properties for the column, such as column width and alignment. For more information, see Configuring column properties for a web report.

   By default, when you define a calculated column, that column is selected and its column properties display in the Configuration Panel. You can return to the column properties at any time by clicking the column name in the Column Definitions box.

As you add calculated columns to the grid, the grid in the Report Canvas updates to show data for that column, using the specified row dimension or fixed row structure.



Example web report after creating a calculated column

Defining calculations

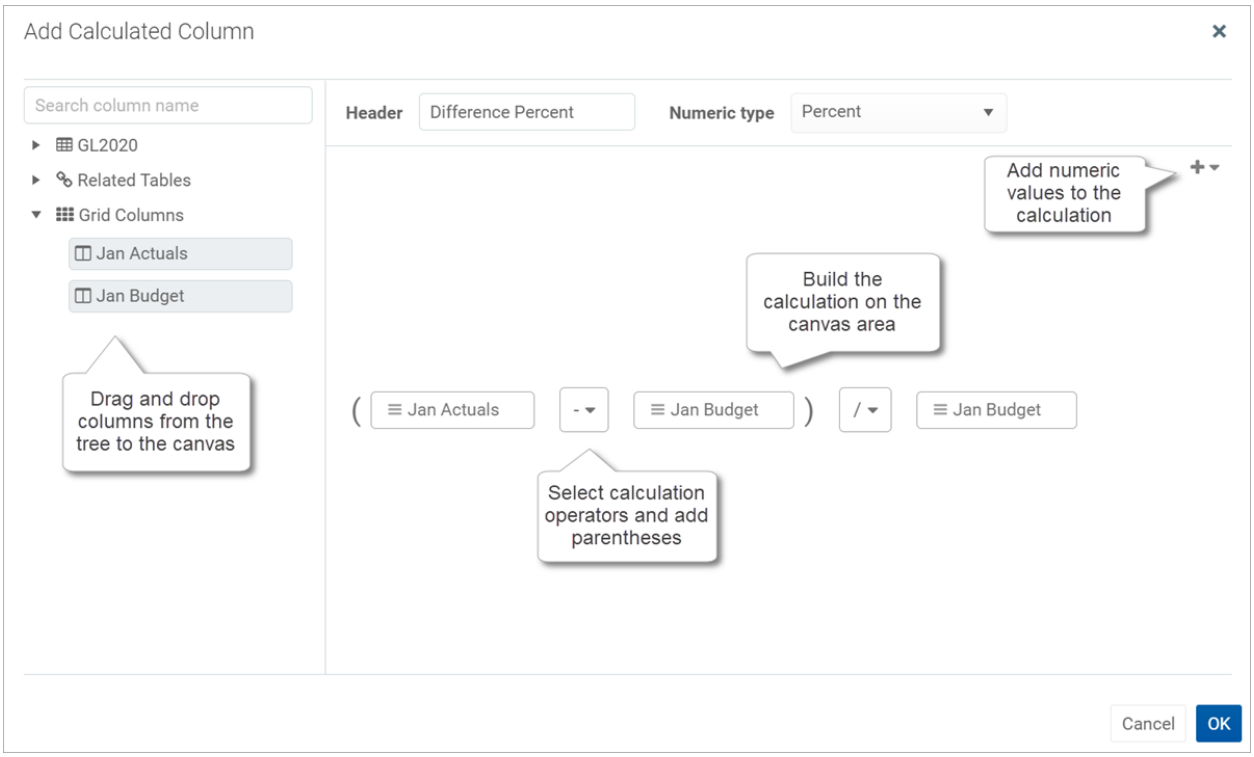
Using the **Add Calculated Column** dialog, you can build a calculation based on columns from related tables that are eligible to be included in the report. The column does not have to be present in the grid in order to be used in a calculation. Numeric values can also be used in the calculation.

The left-hand side of the dialog lists a table tree of available columns, while the right-hand side of the dialog—the calculation "canvas"—is where you build the calculation. To start the calculation:

- Drag and drop two columns out to the canvas. The two columns are separated by an operator selector.
- Select the desired operator.

You can continue building the calculation by dragging and dropping additional columns and selecting the operator. You can also do the following:

- **Numeric values**: To add a numeric value to the calculation, click the plus icon at the top right of the dialog. You can then move, reorder, or delete the numeric value just like columns.
- **Reorder items**: To change the order of columns in the calculation, drag and drop them on the canvas.
- **Parentheses**: To add parentheses to a part of the calculation, select **Add Parentheses** from the operator selector. The two columns affected by the operator will become enclosed in parentheses.
- **Delete items**: To delete an item, hover your cursor over the column and then click the trash can icon.



Example calculation in the calculation editor

Calculations can use the following operators: addition (+), subtraction (-), multiplication (*), and division (/). Use parentheses to determine calculation order, such as: `(GL2021.Q1-BGT2021.Q1)/BGT2021.Q1`.

Calculations can use the following columns:

- Numeric columns from the primary table, whether or not those columns are also in the grid.
- Numeric columns from related tables, whether or not those columns are also in the grid.
- Numeric columns from the grid, including other calculated columns. Grid columns display using the header text defined for the column.

  If you use a table column from the grid instead of from the table itself, then the calculation will use the column as it is configured to display in the grid. For example, if the grid column has a column filter or uses an alternate aggregation, the calculation will be based on that modified version of the column.

NOTES:

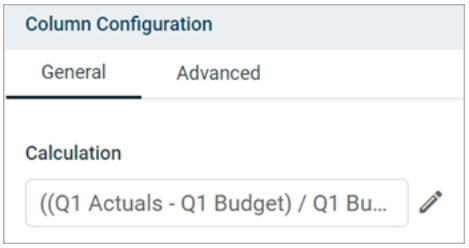
- If you drag and drop a column from the primary table or a related table, it displays on the canvas using the column name only—such as M1. You can hover your cursor over the column box to see a tooltip with the full table.column name—such as GL2021.M1. If you drag and drop the column from the Grid Columns node, then it will display using the defined header text for the column.
- If you use a grid column in the calculation, then the grid column cannot be deleted from the grid because deleting it would cause the calculation to become invalid. An error message will display if you attempt to delete a referenced column from the grid. To resolve the issue, you can do one of the following: edit the calculation to remove the reference, delete the calculated column, or configure the grid column as hidden so that it can still be referenced in the calculation but not display in the report.

Editing calculated columns

You can edit an existing calculated column to change the calculation.

To edit a calculated column in a web report:

1. In the Report Canvas of the Report Builder, click the calculated column in the Column Definitions box.
2. On the **General** tab of the **Column Configuration** properties, click the Edit icon to the right of the **Calculation** box.



3. In the **Edit Calculated Column** dialog, edit the calculation as needed, then click **OK**.

Additional column actions

Once data columns and calculated columns have been added to the grid, you can further adjust them as follows:

- **Reorder columns**: You can reorder the columns in the grid by dragging and dropping them to any location in the Column Definitions box. Note that you cannot drag and drop a column from the Column Definitions box to the Row Definitions box and vice versa. If you accidentally dragged a column to the wrong box, you must remove the column and then drag and drop it again from the Data Panel.

- **Remove columns**: You can remove columns from the grid by clicking the **X** icon to the right of the column name. Use caution before removing a calculated column—if you later decide you want to re-add the column, you will need to re-create the calculation from scratch.
- **Group columns**: If you want a set of columns to display under a group header, you can define a column group and then add the columns to that group. For more information, see Defining column groups for a web report.
- **Configure columns**: To configure display properties for a column, select the column name in the Column Definitions box, then use the **Column Configuration** properties in the Configuration Panel. For more information, see Configuring column properties for a web report.

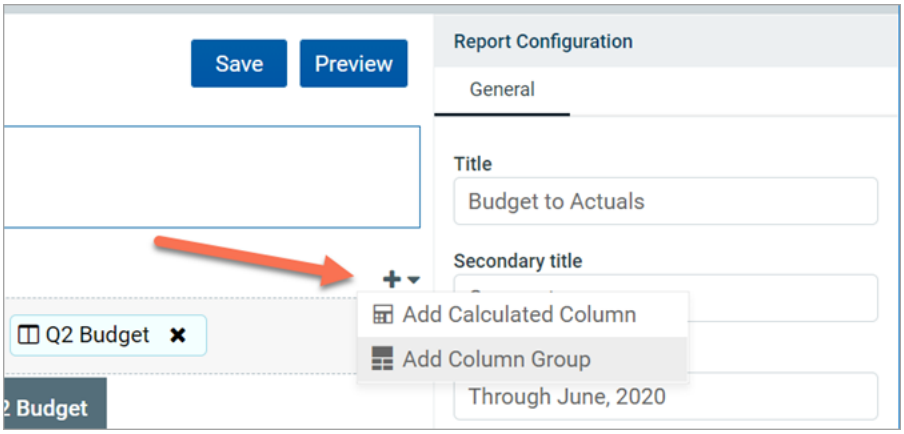
Defining column groups for a web report

You can define column groups in web reports so that certain columns can display together under a group header. For example, your report might have several actuals columns followed by several budget columns, and you want these columns to display under the group headers "Actuals" and "Budget".

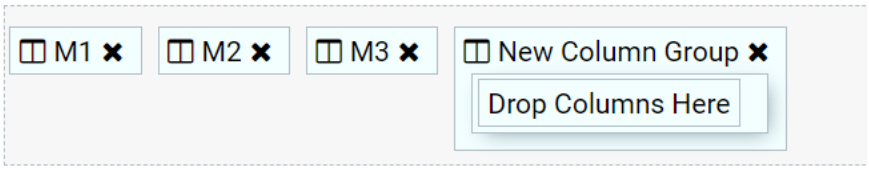
To define a column group, first you add the group "container" to the Column Definitions box of the grid, then you add table columns to the group container.

To define a column group:

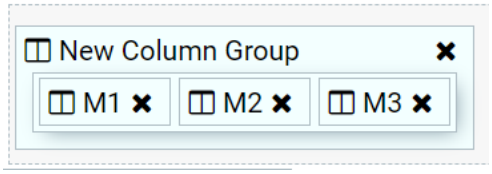
1. In the Report Canvas of the Report Builder, click the plus sign in the top right corner of the Column Definitions box, and then click **Add Column Group**.



A new empty column group is added to the Column Definitions box.

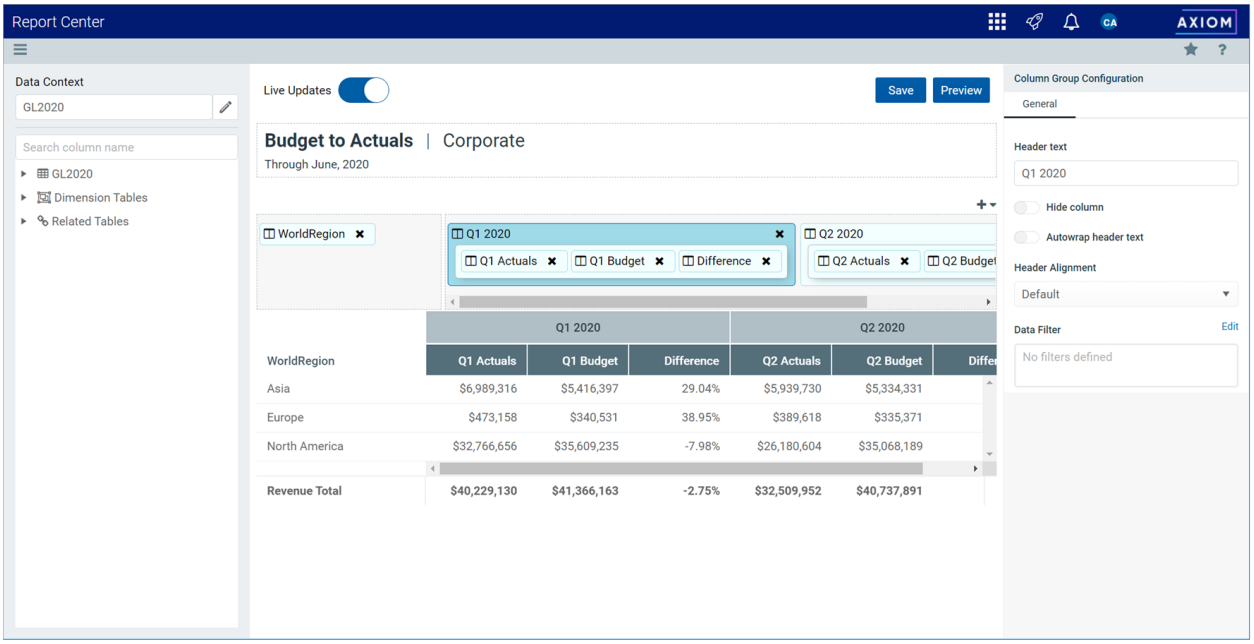


2. Drag and drop the desired columns into the column group. You can drag columns that are already present in the Column Definitions box, or you can drag columns from the table tree in the Data Panel directly. Calculated columns can also be placed in a column group.



3. Select the column group box, and use the **Column Group Configuration** panel to define the header text and other properties. See the following section for more information on the available properties.

The column group displays in the grid with its child columns underneath.



Example web report with column groups

Once a column group has been created, you can work with it as follows:

- **Reordering groups**: You can reorder column groups by dragging and dropping the group to another location within the Column Definitions box.
- **Deleting groups**: You can delete a column group by clicking the **X** icon on the group box. However, if you still want to use the columns in the group, you should drag and drop the columns out of the group before deleting the group. If you delete the group with columns in it, all of the columns will be deleted as well.
- **Configuring groups**: Click the column group box to edit the **Column Group Configuration** properties in the Configuration Panel.

- **Nested groups**: Currently, nested groups are not allowed. You cannot drag and drop a group within another group.

You can work with columns within the group as follows:

- **Adding columns**: You can continue to add columns by dragging and dropping them into the group box.
- **Removing columns**: You can drag and drop columns out of the column group box to remove them from the group. If you don't want the column to be in the report at all, you can use the **X** icon on the column box to remove it.
- **Reordering columns**: You can reorder columns in the group by dragging and dropping them within the group box.
- **Configuring columns**: Columns in a column group can be configured as normal. Select the column box within the group box to bring up the **Column Configuration** properties in the Configuration Panel.

Column group properties

The following column group properties are available for web reports on the **General** tab of the **Column Group Configuration** panel:

Item	Description
Header	The header text to display on the group header. Enter the desired header text.
Hide column	Specifies whether the column group is hidden in the report: • If enabled, then the group is hidden in the report. The group remains visible in the Column Definitions box so that you can continue to configure the group as needed. • If disabled (default), then the group is visible.
Autowrap header text	Specifies whether header text wraps: • If enabled, then header text that exceeds the group width will wrap. • If disabled (default), then header text that exceeds the group width is truncated. The user can resize the group wider to view the full header text.
Header alignment	The alignment of the header text over the columns in the group. Select one of the following: **Default**, **Left**, **Right**, **Center**. Group headers use center alignment by default.

Item	Description
Data filter	Optional. Defines a filter to limit the data shown in the columns within this group. This is equivalent to defining the same data filter at the column level for each column in the group. Click the **Edit** button to open the Filter Wizard and define a filter. Once you have defined a filter, it displays in the **Data filter** box. If you want to change or remove the filter, click the **Edit** link again and change or delete the filter within the Filter Wizard. The **Data filter** box is not directly editable. Data filters defined at the group level are combined with any filters defined at the column level. If the group contains calculated columns, the group filter is applied to all columns referenced in the calculation. If the calculation references grid columns, the group filter is combined with any other filters applied to the grid columns (either at the column level or at the group level, if the column belongs to a different group). Additionally, if a data filter is defined at the grid level, it is also applied. All relevant filters are combined using AND to determine the data that can display in a particular column.

Configuring report properties for a web report

The report properties define the titles and subtitles that display in a web report. You can define a title, subtitle, and secondary title.

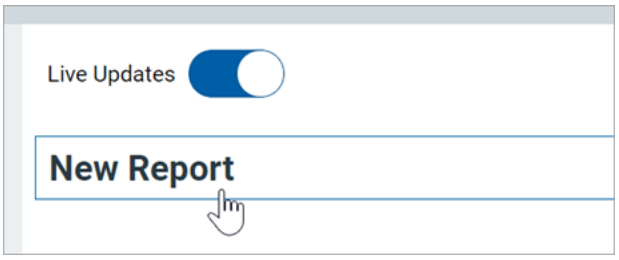
	Q1 2020			Q2 2020		
WorldRegion	Q1 Actuals	Q1 Budget	Difference	Q2 Actuals	Q2 Budget	Difference
Asia	$6,989,316	$5,416,397	29.04%	$5,939,730	$5,334,331	11.35%
Europe	$473,158	$340,531	38.95%	$389,618	$335,371	16.18%
North America	$32,766,656	$35,609,235	-7.98%	$26,180,604	$35,068,189	-25.34%
Revenue Total	**$40,229,130**	**$41,366,163**	**-2.75%**	**$32,509,952**	**$40,737,891**	**-20.20%**

Example titles as they display in a rendered report

In the Report Builder, the Report Configuration properties are defined in the right-hand Configuration Panel.

To configure report properties for a web report:

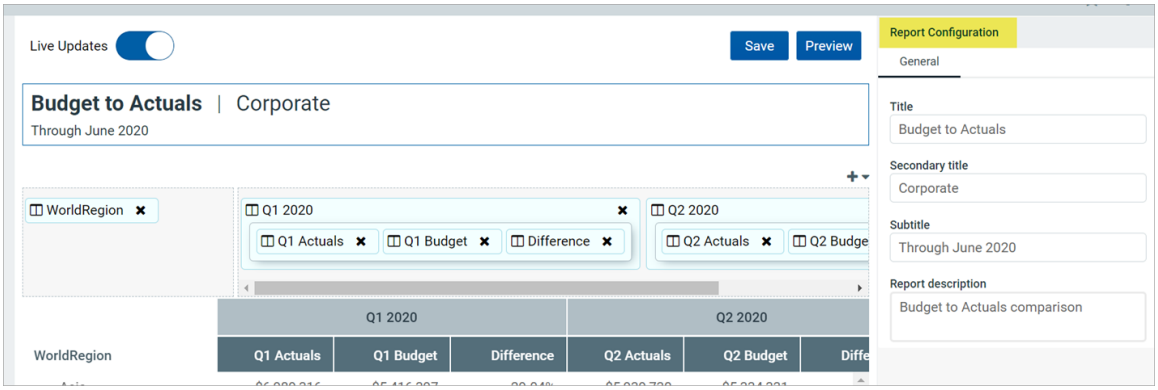
1. In the Report Canvas of the Report Builder, click on the title text to load the Report Configuration properties. For example, if the report currently uses the default name of New Report, click on the New Report text or next to it.



Click on the title text to load the Report Configuration properties

If you are in a brand new report, the Report Configuration properties display by default when you first enter the Report Builder. However, as soon as you drag and drop a column to the Row Definitions box or the Column Definitions box, the column will be selected which causes the Column Configuration properties to display. In this case you need to click on the report title to return to the Report Configuration properties.

2. Complete the **Report Configuration** properties that display in the Configuration Panel.



Report properties

The following properties are available for web reports in the Report Configuration panel:

Item	Description
Title	The main title for the report. This text displays at the top of the report, over the grid.

Item	Description
Secondary title	Optional. The secondary title for the report. If defined, this text displays in the same line as the main title, separated by a horizontal pipe character. For example: *Title* | *Secondary Title*
Subtitle	Optional. The subtitle for the report. This text displays in smaller font underneath the main title.
Description	Optional. A description for the report.

Frequently asked questions

How do I define a report-level filter to limit the data in the report?

You can set a grid-level data filter to limit the data in the report. Select the data grid on the Report Canvas, then use the Grid Configuration properties to define a **Data Filter**.

Because currently web reports can only contain a single grid, defining a grid-level filter is effectively the same as defining a report-level filter.

Can I use variables in the report titles?

Web reports do not currently support variables. This functionality is likely to be a future enhancement.

Configuring grid properties in a web report

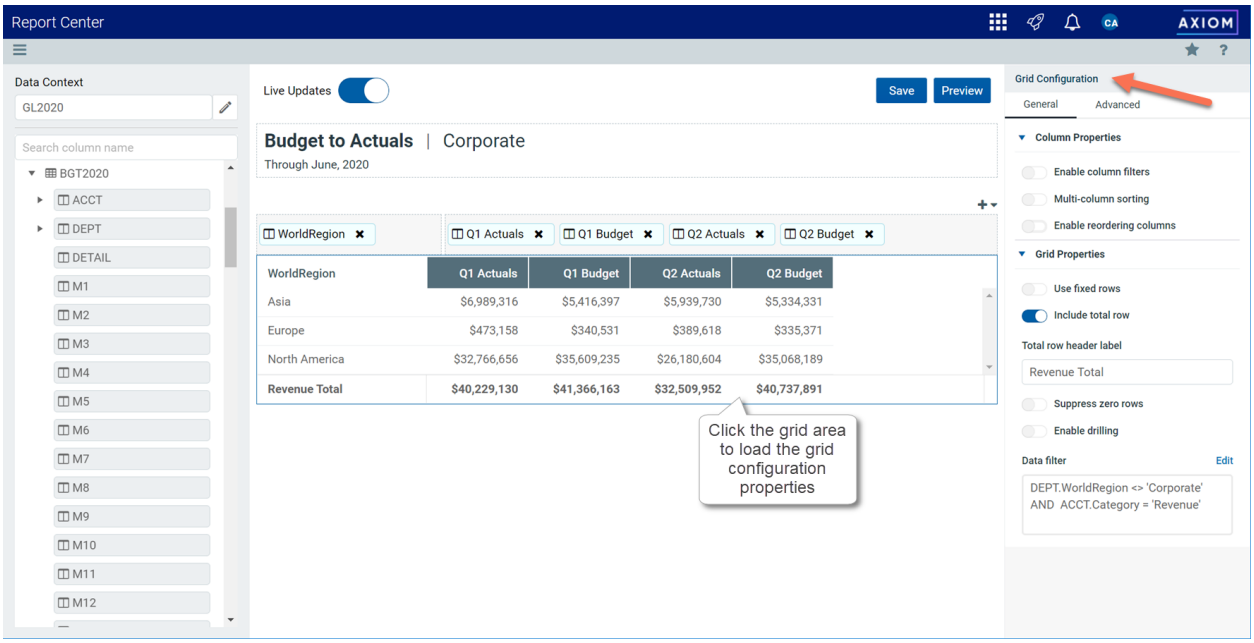
The grid properties define the available features and the overall presentation of data in a web report. Using the grid properties, you can configure:

- User interaction properties such as whether users can filter columns, sort columns, and reorder columns
- Data properties such as a filter to limit data in the grid, and drilling options
- Display properties such as whether the grid has a total row and whether rows with all zero values display

In the Report Builder, the grid properties are defined in the right-hand Configuration Panel.

To configure grid properties for a web report:

1. In the Report Canvas of the Report Builder, click the grid that displays below the column setup boxes.
2. In the right-hand Configuration Panel, complete the **Grid Configuration** properties as needed.



The grid configuration properties are separated into two tabs:

- **General**: Basic grid properties that should be reviewed and configured for all web reports.
- **Advanced**: Advanced grid properties such as default column formats for the grid.

General grid properties

The following grid properties are available for web reports on the **General** tab of the **Grid Configuration** panel:

Column Properties

Item	Description
Enable column filters	Specifies whether users can filter columns in the grid. Only applies to grids with dynamic rows; users cannot filter columns in grids where **Use fixed rows** is enabled. • If enabled (default), then filter icons display on columns where **Enable filter** is enabled in the column configuration properties. Report users can use these icons to filter the data shown in the column. If **Enable filter** is disabled on a column, the filter icon is not available for that column. • If disabled, then filter icons do not display on any columns, regardless of whether **Enable filter** is enabled for the column.

Item	Description
Multi column sorting	Specifies whether users can sort by multiple columns in the grid. Only applies to grids with dynamic rows; users cannot filter columns in grids where **Use fixed rows** is enabled. • If enabled, then users can sort the grid by multiple columns. If the grid is already sorted by a column and a user clicks another column to sort, then the grid is first sorted by the most recent column and then sorted by the original column. Columns will remain sorted until the user toggles the sort disabled for that column. • If disabled (default), then users can sort the grid by a single column. If the grid is already sorted by a column and a user clicks another column to sort, then the sort is disabled on the original column and the grid becomes sorted by the most recent column. Users can sort columns by clicking on the column header. Each click toggles through sort ascending, sort descending, and no sort. **NOTE:** The ability to clear the sort is only available if multi-column sorting is enabled. Otherwise, clicking a column header will toggle between sort ascending and sort descending. You can click a different column header to sort by that column, but you cannot clear the sort.
Enable reordering columns	Specifies whether users can reorder columns in the grid. • If enabled (default), then users can drag and drop columns within the grid to temporarily reorder them. • If disabled, then users cannot reorder columns in the grid.

Grid Properties

Item	Description
Use fixed rows	Specifies whether the grid uses dynamic rows or a fixed row structure. • If enabled, then the grid uses a fixed row structure to define the rows. Select the structure using the **Fixed row structure** field. For more information, see Specifying the fixed row structure for a web report. • If disabled (default), then the grid dynamically generates rows based on a table column specified as the row dimension. The row dimension is specified by dragging and dropping the desired table column into the Row Dimensions box at the top of the Report Canvas. For more information, see Specifying the row dimension for a web report.

Item	Description
Fixed row structure	Specifies the fixed row structure to use in the grid. Only applies when **Use fixed rows** is enabled. Select an existing fixed row structure to define the rows of the grid. You can type into the box to filter the list of fixed row structures by name. Fixed row structures can be created from the Report Center. For more information on creating fixed row structures, see Managing Fixed Row Structures.
Include total row	Specifies whether a total row is present on the grid. Only applies to grids with dynamic rows; if **Use fixed rows** is enabled then the grid uses subtotal and total rows as defined in the fixed row structure. • If enabled, then a total row displays at the bottom of the grid. If the grid data is paged, the total row shows the total of all rows across all pages. Use the **Total row header label** field to define label text for the total row, such as "Total". This text displays in the last row dimension column. Columns displaying numeric, non-dimensional data are included in the total row by default. If desired, you can exclude a numeric column from the total row using the column configuration properties. • If disabled (default), then the grid does not have a total row.
Suppress zero rows	Optional. Specifies whether data rows with all zeros are suppressed from showing in the grid. Only applies to grids with dynamic rows; all zero rows cannot be suppressed in grids where **Use fixed rows** is enabled. Non-key columns that meet both of the following criteria are evaluated to determine whether a row should be hidden: • The column data type is Integer (all types) or Numeric. • The column is from the primary table or an additional data table. If the primary table is a data table, Integer and Numeric columns on lookup reference tables are ignored—meaning these columns may have values, but the row is still suppressed if all applicable data table columns have zero values. There is one exception: reference table columns are considered if the column classification is Values and the numeric type is Currency. Calculated columns defined in the grid are not evaluated for this purpose and do not prevent a row from being suppressed.

Item	Description
Enable drilling	Specifies whether users can drill down rows in the grid to view the underlying data. • If enabled, then users can drill rows in the grid. Use the **Drilling type** property to specify what type of drilling options are present: ◦ **Key columns** (default): Users can drill down to the key column level of the data. These drilling options are automatically generated based on the validated key columns of the primary table. No additional setup is required. ◦ **Directed**: Users can drill down predefined drilling paths. Use the **View/Edit Configuration** link underneath the **Directed** option to configure the drilling paths. For more information, see Configuring drilling for web reports. • If disabled (default), then users cannot drill rows in the grid.
Data filter	Optional. Defines a filter to limit the data shown in the grid. The grid-level data filter should be used instead of column-level data filters when you want the filter to impact the entire grid. Click the **Edit** button to open the Filter Wizard and define a filter. Once you have defined a filter, it displays in the **Data filter** box. If you want to change or remove the filter, click the **Edit** link again and change or delete the filter within the Filter Wizard. The **Data filter** box is not directly editable.

▶ Advanced grid properties

The following grid configuration properties are available for web reports on the **Advanced** tab of the **Grid Configuration** panel:

Default column formats

Use this section to view and define default column formats for the grid based on column data type. All columns added to the grid will inherit the settings defined here. By default, columns will continue to inherit any changes made to the default column formats unless the format has been overridden at the column level.

For example, the default alignment for String columns is Left. When String columns are added to the grid, they are configured to use the Default alignment, meaning Left. If desired, you can change the default alignment for String columns to Center, and all String columns in the grid that are using the Default alignment will now update to use Center alignment. However, if you have manually configured a particular String column to use Right alignment instead of the Default alignment, that column will continue to use its configured alignment of Right.

Item	Description
Data type	Select a column data type to view and edit the default column formats for that type. The following data types are available: • **String**: Columns containing text or alphanumeric values. Includes table columns using the String data type. • **Date**: Columns containing dates. Includes table columns using Date or DateTime data types. • **Boolean**: Columns containing True or False values. Includes table columns using the Boolean data type. • **Dimension**: Columns containing numeric dimension codes. Includes table columns using Numeric, Integer, or Identity data types, where the Column Classification is Dimension. • **Decimal**: Columns containing decimal numeric values. Includes table columns using the Numeric data type, where the column has a Numeric Type of Number. • **Number**: Columns containing whole integer numeric values. Includes table columns using Integer or Identity data types, where the Column Classification is Value. • **Currency**: Columns containing currency numeric values. Includes table columns using the Numeric or Integer data types, where the column has a Numeric Type of Currency. • **Percent**: Columns containing percent numeric values. Includes table columns using the Numeric or Integer data types, where the column has a Numeric Type of Percent. Additionally, when you create a calculated column, you can specify its data type as one of the numeric data types. The column will then use the default column formats for that data type. The default data type for calculated columns is Currency. **NOTE:** Columns that would normally be treated as Number data type are treated as Dimension data type if they are used as row dimension columns or drill columns.
Column width	The default column width for the selected **Data Type**, in pixels. Enter the desired column width as a whole integer between 20 and 1000. The default width for each data type is as follows: • Currency, Decimal, Percent, Date, Boolean: 120 • Number: 150 • String, Dimension: 200

Item	Description
Alignment	The default alignment of the column values for the selected **Data Type**. If you want to change the default alignment for a data type, select one of the following: **Left**, **Right**, **Center**. The default alignment for each data type is as follows: • String, Date, Boolean, Dimension: Left • Decimal, Number, Currency, Percent: Right

Numeric properties

Use this section to view and define default number formats for the grid based on column data type. All columns added to the grid will inherit the settings defined here. By default, columns will continue to inherit any changes made to the default number formats unless the column has been configured to use a custom format.

For example, the default number format for the Currency data type uses 0 decimal places, with a thousands separator, and a negative number format of red parentheses. When a Currency column is added to the grid, the contents automatically display using this number format. If desired, you can update the default number format for Currency so that it uses 2 decimal places, and all columns using the Currency number format will now update to show 2 decimal places. This applies to columns that use the Currency number format by default, as well as columns that you have manually configured to use the Currency format. However, if you have changed a column so that it now uses a Custom number format instead of the Currency number format, then it will continue to use its custom configuration.

This section only applies to numeric data types. It does not display for data types such as String or Date.

Item	Description
Decimal places	The number of decimal places used by the selected **Data Type**. Enter any whole number from 0 to 10. You can also use the arrow keys to move the number up or down. The default number of decimal places for each numeric data type is as follows: • Currency: 0 • Decimal, Percent: 2 The Number data type does not use decimals.
Use 1000's separator	Specifies whether the selected **Data Type** uses a thousands separator: • If enabled (default), numbers show with a thousands separator, such as 1,000. • If disabled, numbers do not use a thousands separator, such as 1000.

Item	Description
Negative number format	The format used by the selected **Data Type** to display negative numbers. Select the desired format from the drop-down list. Available formats use the minus sign, or parentheses, or red text (or a combination of these formats). The default negative number format for each numeric data type is as follows: • Decimal, Number, Percent: Minus sign • Currency: Red text in parentheses

▶ Frequently asked questions

Can I disable paging for a dynamic row grid?

Currently, if the grid uses dynamic rows then the grid is automatically paged if it exceeds 25 rows. This paging cannot be disabled. However, keep in mind that when the grid is exported to PDF or Excel, the paging is automatically disabled and the export file will show all rows.

Configuring column properties for a web report

The column properties define the presentation of each column in the grid. Using the column properties, you can configure:

- Display properties such as header text, column width, alignment, and number formatting
- Data properties such as column filters, alternate aggregation, and display formats for data
- Grid behavior properties such as inclusion in the total row, and whether end users can sort and filter using the column

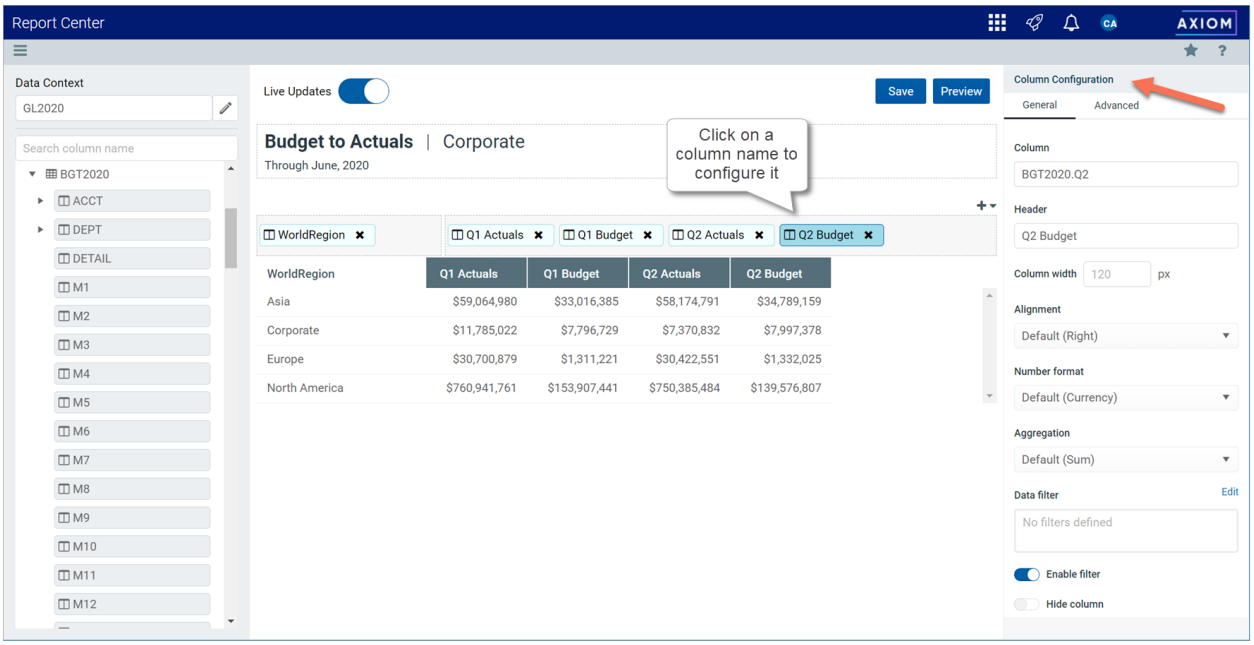
In the Report Builder, the column properties are defined in the right-hand Configuration Panel.

To configure column properties for a column in a web report:

1. In the Report Canvas of the Report Builder, click a column name in either the Row Dimensions box or the Column Definitions box to select that column.

   You must select the column name in the setup boxes and not the column name in the grid below. Selecting a column name in the preview grid causes the Grid Configuration to display instead of the Column Configuration.

2. Complete the **Column Configuration** properties that display in the Configuration Panel.

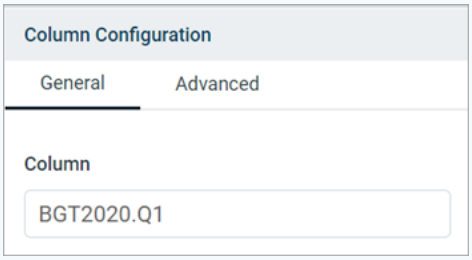
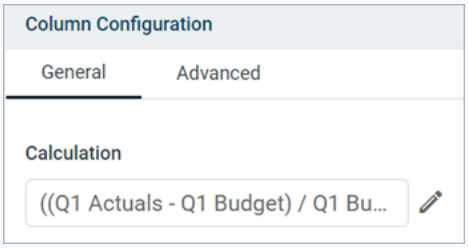


The column configuration properties are separated into two tabs:

- **General**: Basic column properties that should be reviewed and configured for all columns in the grid.
- **Advanced**: Advanced column properties to be configured as needed.

General column properties

The following column properties are available for web reports on the **General** tab of the **Column Configuration** panel. These properties apply to table columns and to calculated columns.

Item	Description
Column or Calculation	The following information displays at the top of the panel to identify the column: • **Column**: If the column is a table column, the full Table.Column path displays for your reference.  • **Calculation**: If the column is a calculated column, a text representation of the calculation displays for your reference. You can click the Edit icon to the right of the box to open the **Edit Calculated Column** dialog and edit the calculation as needed. 
Header	The header text to display on the column header. Enter the desired header text. • If the column is a table column, the column name is used as the header text by default. • If the column is a calculated column, the text "Calculation" is used as the header text by default.
Column width	The width of the column in the grid, in pixels. Enter the desired column width as a whole integer between 20 and 1000. The default width depends on the column data type, and is configured at the grid level. If you do not enter a custom width, then the default width displays in the **Column width** box in gray text. If you leave this default width and the grid-level defaults are changed, then column will update to use the new default width. For more information, see Default column formats.

Item	Description
Alignment	The alignment of the column values. Select one of the following: **Default**, **Left**, **Right**, **Center**. The default alignment depends on the column data type, and is configured at the grid level. If a column is set to use Default and the grid-level defaults are changed, the column will update to use the new default alignment. For more information, see Default column formats.
Number Format	The number format used by the column. Only applies to columns that hold numeric data. Select one of the following: • **Default**: The column uses the default number format as defined for the column's data type at the grid level. If a column is set to use **Default** and the grid-level defaults are changed, the column will update to use the new default number format. For more information, see Numeric properties. • **Currency**, **Decimal**, **Number**, **Percent**, or **Dimension**: The column uses the default number format as defined for the selected data type. For example, you may have a column that is natively a Decimal column, but you want it to display using Currency format in a particular report. If a column is assigned to a different number format, it will also inherit the default column width and alignment set for the associated data type, if the column is using the default column with and alignment. • **Custom**: The column uses a custom number format as defined in the column properties. If Custom is selected, then several additional properties become available to configure the number format. In this case, the column is no longer tied to any particular default number format. ◦ **Decimal places**: Specify the number of decimal places to display, from 0 to 10. ◦ **Use 1000's separator**: Specify whether the number uses a thousands separator or not. ◦ **Negative number format**: Specify the format to use for negative numbers.
Aggregation	The aggregation type used to aggregate data queried from the database column. Does not apply to calculated columns or to columns used as row dimensions. If you want to override the default aggregation type for a database column, select an aggregation type.

Item	Description
Data filter	Optional. Defines a filter to limit the data shown in this column. The column-level data filter should be used instead of a grid-level data filter when you want the filter to impact just this column. Click the **Edit** button to open the Filter Wizard and define a filter. Once you have defined a filter, it displays in the **Data filter** box. If you want to change or remove the filter, click the **Edit** link again and change or delete the filter within the Filter Wizard. The **Data filter** box is not directly editable. Data filters defined at the column level are combined with any filters defined at the column group level and at the grid level. All relevant filters are combined using AND to determine the data that can display in a particular column. **NOTES:** • If a data filter is defined for a calculated column, the filter is applied to the columns referenced in the calculation. • Column-level data filters cannot be defined for columns used as row dimensions. To limit the rows shown in the grid, use the grid-level filter in the Grid Configuration properties.
Enable filter	Specifies whether end users can filter based on the column contents. • If enabled (default), and if **Enable Column Filters** is enabled in the Grid Configuration properties, then a filter icon is available on the column in the rendered report. Users can use this column to filter the grid based on the column contents. • If disabled, then the filter icon is not available on the column. This property does not apply to columns used as row dimensions. It also does not apply to the entire grid if **Use fixed rows** is enabled in the Grid Configuration properties. Fixed row reports do not support end-user column filtering.
Hide column	Specifies whether the column is hidden in the report: • If enabled, then the column is hidden. The column remains visible in the Report Builder so that you can continue to configure the column as needed. • If disabled (default), then the column is visible.

Item	Description
Show description	Specifies whether you want descriptions to display for dimension values. This option only applies to key columns and validated columns that have an associated description column. • If enabled (default), then descriptions display alongside the dimension values or instead of the dimension values. For example, if the column is Acct then you likely want the account descriptions to display along with the account codes. When this option is enabled, the **Description display format** field becomes available. Select the desired display format from this list. By default, the format **Description (Value)** is used. • If disabled, then only the dimension values display. For example, if the column is Acct then only the account codes will display. **NOTE:** If the dimension table has multiple description columns (meaning columns where **Describes Key** is **True**), then the first description column is used.
Include in total row	Specifies whether the column is included in the total row, if a total row is enabled in the Grid Configuration properties. Select one of the following: • **Default**: The column is included or not based on its data type. All numeric columns are included by default unless they are the Dimension data type. All other non-numeric columns are not included by default, unless you change the aggregation so that the column returns a number (such as using Count aggregation on a String column). • **Include**: Override the default behavior and include the column in the total row. • **Exclude**: Override the default behavior and exclude the column from the total row. This option does not apply if **Use fixed rows** is enabled in the Grid Configuration properties. Columns will be included or excluded in subtotal or total rows using the default behavior.

▶ Advanced column properties

The following column configuration properties are available for web reports on the **Advanced** tab of the **Column Configuration** panel:

Header Properties

Item	Description
Header text (row 1)	The header text to display on the column header. Enter the desired header text. **NOTES:** • This is the same property that displays on the **General** tab as **Header**. The header text can be edited from either tab. • The **(row 1)** label only displays if **Multi-row header** has been enabled. In this case, the property defines the header text for the top row of the multi-row header.
Header text (row 2)	The header text to display on the second row of the column header. Enter the desired header text. This property is only available if if **Multi-row header** has been enabled.
Multi-row header	Specifies whether the column header has multiple rows: • If enabled, then the header text property updates so that there are two properties: **Header text (row 1)** and **Header text (row 2)**. The default header text populates row 1. You can define additional text to display on row 2. • If disabled (default), then only one row of header text can be defined. Keep in mind that enabling a multi-row header is different than wrapping header text. If you enable multi-row headers, then you can define two separate rows of header text. A line break separates each row. If autowrap is enabled, then each row of header text wraps individually. If you just want a single row of header text that wraps, you can leave this option disabled and then enable **Autowrap header text**.
Autowrap header text	Specifies whether header text wraps: • If enabled, then header text that exceeds the column width will wrap. If **Multi-row header** is enabled, both rows of header text will wrap individually. • If disabled (default), then header text that exceeds the column width is truncated. The user can resize the column wider to view the full header text.

Item	Description
Header alignment	The alignment of the header text. Select one of the following: **Default**, **Left**, **Right**, **Center**. All column headers use **Default** alignment by default. By default, the header text uses the same alignment as the column contents (as determined by the **Alignment** property on the **General** tab). If you leave the header alignment set to Default, then the header alignment will adjust to match the column alignment. If, however, you want the header alignment to be different than the column alignment, you can configure this property.

▶ Frequently asked questions

I defined a column filter but it isn't impacting the grid data as I expected—why do I still see rows that don't match the column filter?

A column filter only filters the data coming into that specific column. If you want to define a filter that impacts the entire report, including the row data, then you should define a filter at the grid level. Select the grid and then use the Grid Configuration properties to define a **Data Filter**.

To illustrate the difference, imagine the following uses of a filter to only show data from the West region:

- **Grid**: When the filter `Dept.Region='West'` is defined for the grid, the entire grid is filtered to only show data from the West region. Row dimension values (such as departments) will only display if they belong to the West region, and column data is limited to only show data for the West region.
- **Column**: When the filter `Dept.Region='West'` is defined on a column, that single column is filtered to only show data from the West region. Other columns and row dimension values are not limited by this filter. You might do this if you want to create a report that shows the different region data in different columns, such as to compare data from the West, East, North, and South regions side-by-side.

Configuring drilling for web reports

You can enable two types of drilling for web reports:

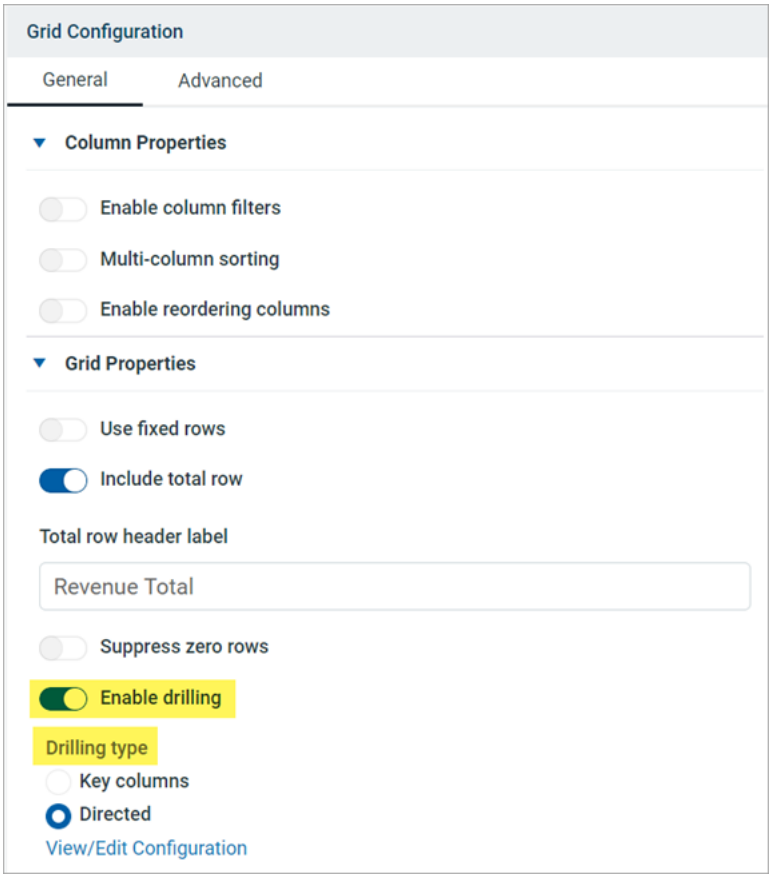
- **Key columns**: Users can drill to view the underlying data based on the key columns of the table specified as the **Data Context**. This option provides limited "out-of-the-box" drilling functionality that does not require any further setup.
- **Directed**: Users can drill to view the underlying data based on predefined drilling paths. The report designer defines the available drilling paths and can configure certain display attributes for the drill.

To enable either drilling option:

1. In the Report Builder, select the grid so that the **Grid Configuration** properties display in the

Configuration Panel.

2. On the **General** tab of the **Grid Configuration** properties, enable **Enable Drilling**.
3. For **Drilling type**, select either **Key columns** or **Directed**.
4. If you selected **Directed**, click the **View/Edit Configuration** link to define the directed drilling paths.



Example drill options enabled for the grid

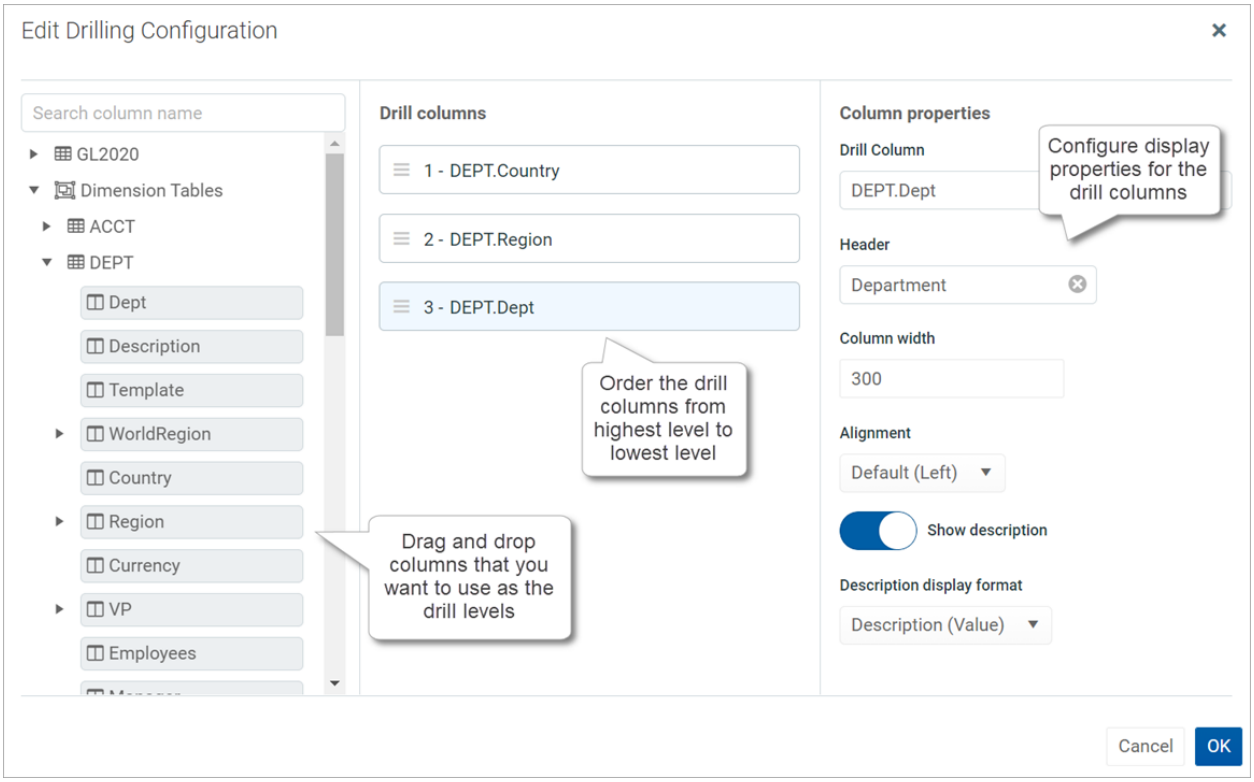
Configuring directed drilling paths

Use the **Edit Drilling Configuration** dialog to define the drilling paths for directed drilling.

To define drilling paths:

1. In the **Grid Configuration** properties, click the **View/Edit Configuration** link under the **Directed** drilling option.

2. Drag and drop columns from the table tree to the **Drill Columns** area in the middle of the dialog. The available columns for drilling depend on the table specified as the primary table for the data context:
    - If the primary table is a data table, then you can use any column on the primary table or on a lookup reference table (the Dimension Tables).
    - If the primary table is a reference table, then you can only use column paths that originate from the primary table. The Dimension Tables node is not present, but you can still use columns from those tables by expanding the primary table and selecting the desired columns through the primary table.
3. Place the drill columns in the desired order for the directed drilling. Users can drill from the column at the top of the list down to the column at the bottom of the list. Generally speaking, the lowest level of detail should be at the bottom—for example: VP > Director > Manager > Dept.
    - To reorder columns, click the handle on the left side of the column box to drag and drop the column to a new position.
    - To remove a column, hover your cursor over the column and then click the **X** on the right side of the column box.
4. Select each drill column and configure the drill properties in the right side of the dialog. See the following table for information on these properties.
5. Click **OK** to complete the drill configuration and return to the Report Builder.



Example drilling configuration dialog

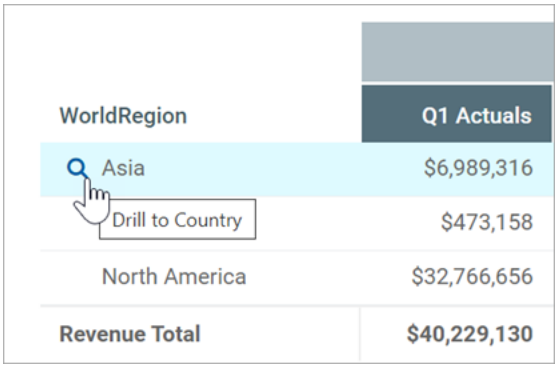
Drill Column Properties

Item	Description
Drill column	The full Table.Column path of the drill column displays for your reference, so that you know which column you are configuring.
Header	Header text for the column in the drill results. Enter the desired text. The column name is used by default.
Column width	The width of the column in the drill results, in pixels. Enter the desired column width as a whole integer between 20 and 1000. By default, the width is 300 for all drill columns, regardless of data type.
Alignment	The alignment of the column values. Select one of the following: **Default**, **Left**, **Right**, **Center**. The default alignment depends on the column data type. If a column is set to use Default and the grid-level defaults are changed, the column will update to use the new default alignment. For more information, see Default column formats.
Show description	Specifies whether you want descriptions to display for dimension values. This option only applies to key columns and validated columns that have an associated description column. • If enabled (default), then descriptions display alongside the dimension values or instead of the dimension values. For example, if the column is Acct then you likely want the account descriptions to display along with the account codes. When this option is enabled, the **Description display format** field becomes available. Select the desired display format from this list. By default, the format **Description (Value)** is used. • If disabled, then only the dimension values display. For example, if the column is Acct then only the account codes will display. **NOTE:** If the dimension table has multiple description columns (meaning columns where **Describes Key** is **True**), then the first description column is used.

Using directed drilling

If directed drilling is enabled and configured, you can drill down the predefined drilling paths to view the underlying data. Directed drilling works as follows:

- When you view the report, you can hover your cursor over a row to show the magnifying glass icon on the left side of the row.



- Click the magnifying glass to drill to the first level of the drill. This is the column positioned at the top of the **Drill Columns** list in the **Edit Drilling Configuration** dialog.The drill results open in a new browser tab.
- From here, you can continue to drill by hovering over a row and clicking the magnifying glass to go to the next level of the drill. All subsequent drills are performed in the same browser tab.
- Once you reach the final level of the drill, no more drilling options are available and the magnifying glass no longer displays.

Using key column drilling

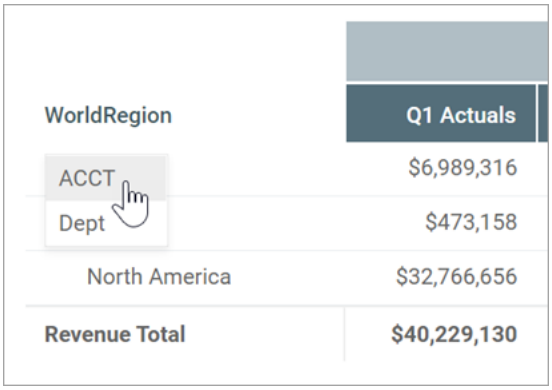
If key column drilling is enabled, you can automatically drill to the key column level to view the underlying data. The available key columns are determined as follows:

- If the primary table used as the data context is a data table, you can drill to the validated key columns on the table. However, any key column used as a row dimension will not be available for drilling, since the report already shows data at that level.
- If the primary table used as the data context is a reference table, you can drill to the key of the reference table, unless the key is used as the row dimension.

When you view the report, you can hover your cursor over a row to show the magnifying glass icon on the left side of the row. From here you can drill as follows:

- If there is only one available key for drilling, click the magnifying glass to drill.

- If multiple keys are available for drilling, click the magnifying glass to show a list of the available keys, then click on the key you want to drill.



The drill results open in a new browser tab. If multiple keys were available for drilling, you can optionally drill the drill results to view the other key(s).

If no keys are available for drilling, then the magnifying glass does not display when you hover your cursor over the row.

Presentation of drill results

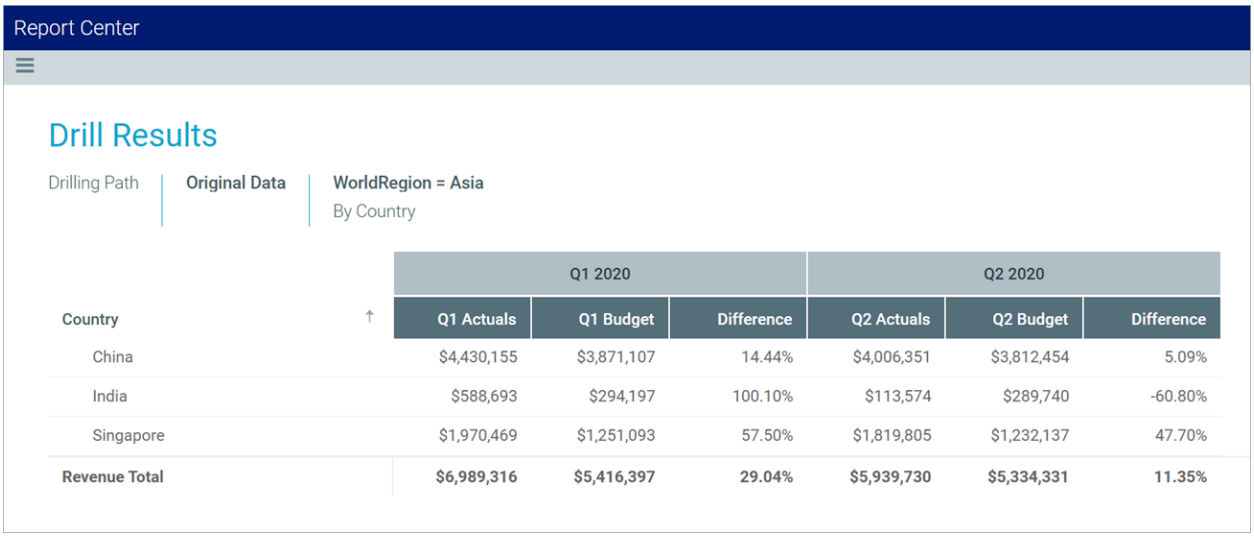
When you drill, the drill results display in a new browser tab. The data contents of the drill results are as follows:

- The row dimension(s) of the original report are removed from the grid and replaced with the current drill column. The drill column is either the current column of a directed drilling path, or the selected key column.
- All other columns of the report are included in the drill results and show data for the current drill level.
- If the drill results contain multiple rows of data, the grid includes a total row. If the drill results contain a single row of data, the total row is omitted.
- Drill results are paged if the results contain many rows.

The current drill path displays along the top of the page. The drill path identifies the row that was drilled and the current drill level. If you have drilled the drill results, the previous drill levels also display in the drill path. You can click a previous drill level to return to that level.

The drill column displays as follows:

- For key column drilling, the column alignment and width are determined by the column data type. The header text is the key column name. Key column values are presented as Description (Value).
- For directed drilling, the column alignment, width, and header text are as configured in the **Edit Drilling Configuration** dialog.



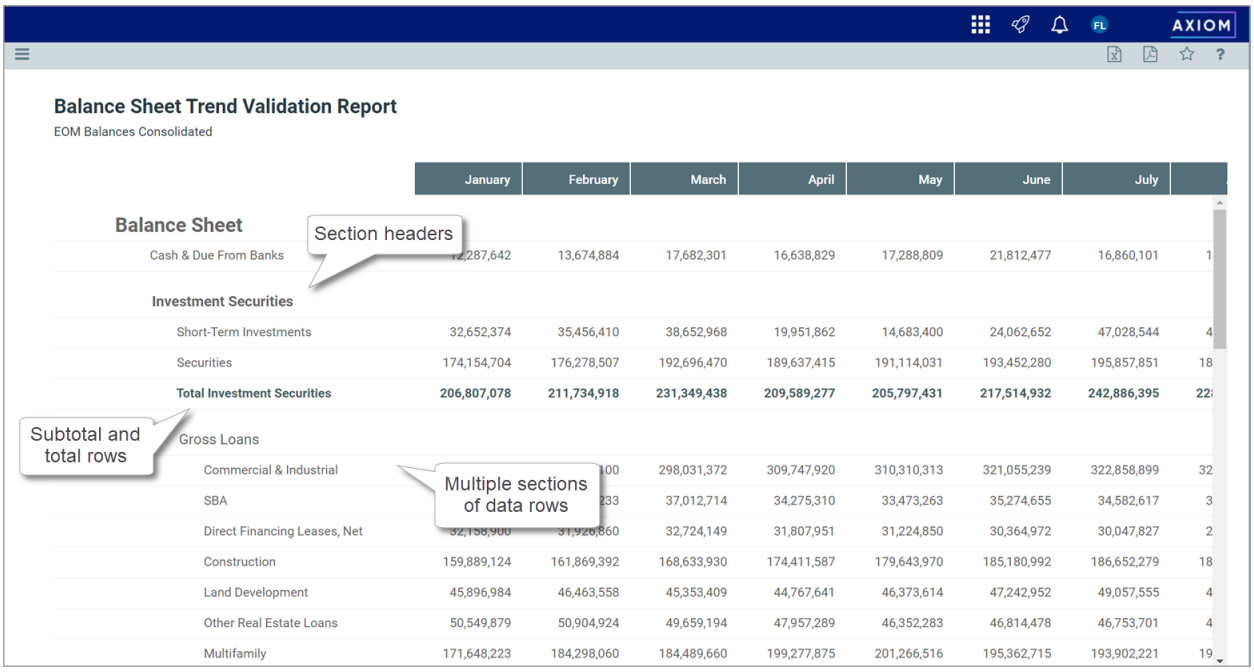
Example drill results with drilling path displayed at the top

6

Managing Fixed Row Structures

Fixed row structures can be used to define data sections for a web report, including section headers, data rows, subtotals, and totals. Fixed row structures are defined separately so that you can reuse them with different web reports, and so that you can update the row structure in one place and have the changes propagate to all reports that reference the structure.

Fixed row structures can be used with "custom" web reports created in the Report Builder, and with web report templates provided by installed Axiom products. The fixed row structure defines the data sections in the report, while the web report defines other report properties such as the data columns, filters, and drilling options.



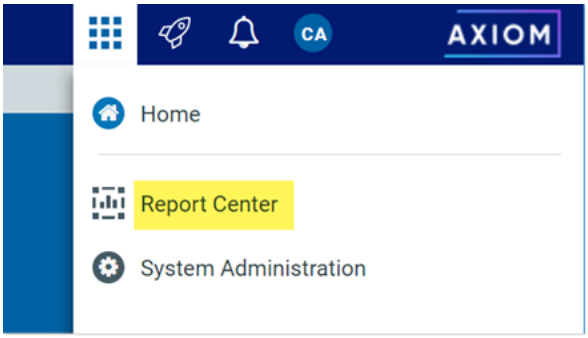
	January	February	March	April	May	June	July
Balance Sheet							
Cash & Due From Banks	12,287,642	13,674,884	17,682,301	16,638,829	17,288,809	21,812,477	16,860,101
Investment Securities							
Short-Term Investments	32,652,374	35,456,410	38,652,968	19,951,862	14,683,400	24,062,652	47,028,544
Securities	174,154,704	176,278,507	192,696,470	189,637,415	191,114,031	193,452,280	195,857,851
Total Investment Securities	**206,807,078**	**211,734,918**	**231,349,438**	**209,589,277**	**205,797,431**	**217,514,932**	**242,886,395**
Gross Loans							
Commercial & Industrial			298,031,372	309,747,920	310,310,313	321,055,239	322,858,899
SBA			37,012,714	34,275,310	33,473,263	35,274,655	34,582,617
Direct Financing Leases, Net			32,724,149	31,807,951	31,224,850	30,364,972	30,047,827
Construction	159,889,124	161,869,392	168,633,930	174,411,587	179,643,970	185,180,992	186,652,279
Land Development	45,896,984	46,463,558	45,353,409	44,767,641	46,373,614	47,242,952	49,057,555
Other Real Estate Loans	50,549,879	50,904,924	49,659,194	47,957,289	46,352,283	46,814,478	46,753,701
Multifamily	171,648,223	184,298,060	184,489,660	199,277,875	201,266,516	195,362,715	193,902,221

Example report using a fixed row structure

You can define as many different fixed row structures as you need. A row structure can be used with any web report where the structure's row dimensions are compatible with the report's columns, filters, drilling options, and any other report property that impacts queried data. Row structures can be created, edited, and deleted using the Report Center.

To access the Report Center:

- Click the menu icon in the Global Navigation Bar. From the Area menu, select **Report Center**.



NOTE: Fixed row structures are not file-based—they are stored directly in the database. There is no file type or library folder for fixed row structures, and you cannot see them in Axiom Explorer. The only place to view and manage fixed row structures is using the Report Center.

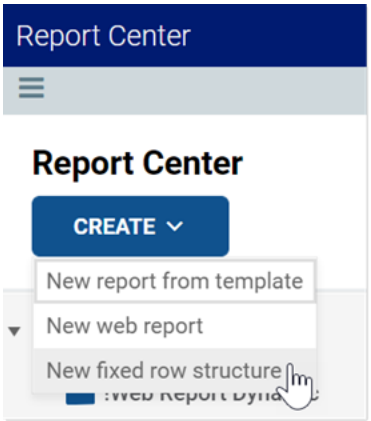
Creating fixed row structures

You can create new row structures as needed for use in web reports.

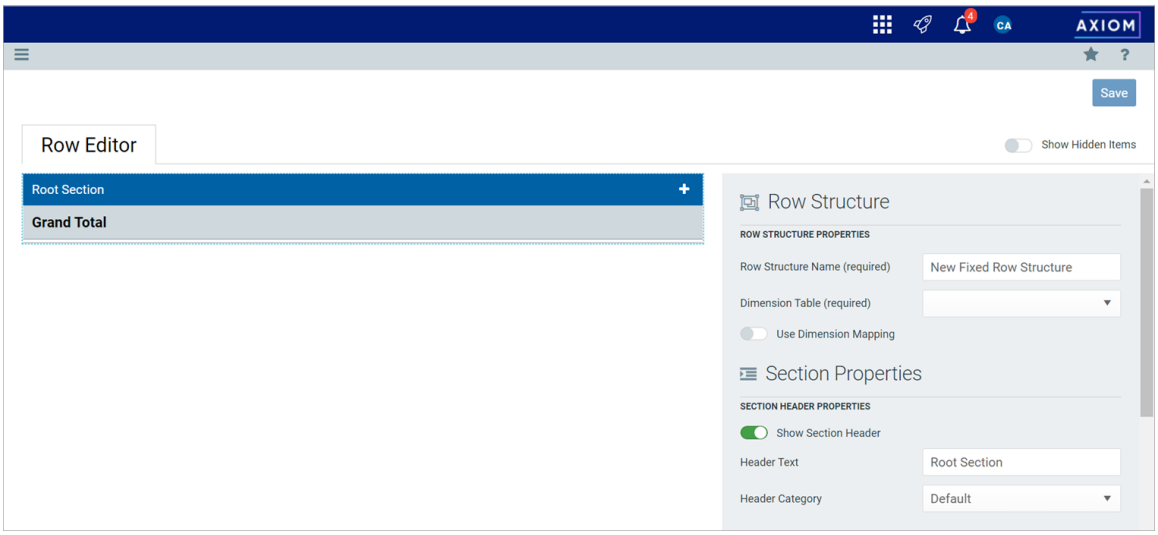
In order to create a fixed row structure, you must be an administrator or have the **Create Web Reports** security permission. If you do not have permission to create web reports, then the option to create a new fixed row structure will not be available from the **Create** button in the Report Center. If you do not have access to any report creation options, then the **Create** button is hidden entirely.

To create a new row structure:

1. In the Report Center, click **Create > New fixed row structure**.



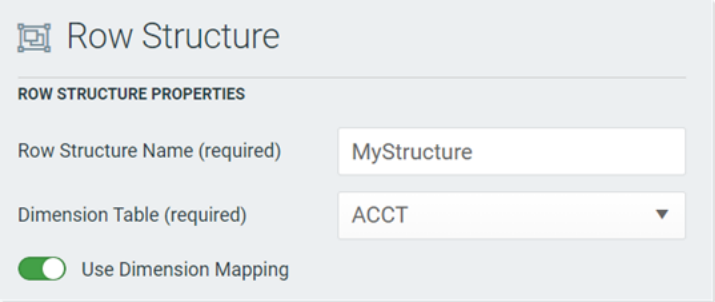
The row structure editor opens in a new browser tab, showing a new blank row structure. The row structure starts with just a top-level section header and a grand total row.



Example new blank row structure

2. In the top of the right-hand panel, complete the following required properties for the row structure:

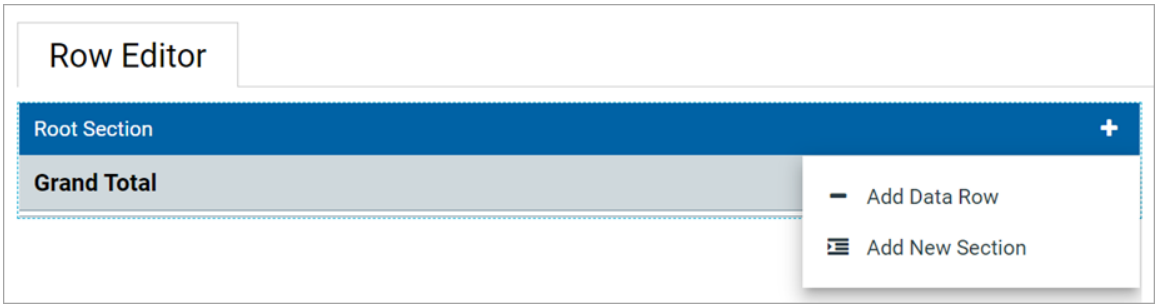
Item	Description
Row Structure Name	Enter the name of the row structure. The name identifies the row structure so that users can select it when creating a new fixed report.
Dimension Table	Specify the dimension table to use for the Filter Wizard when defining row data. For example, if rows will be defined using accounts or account groupings, select the ACCT table.
Use Dimension Mapping	Enable this toggle switch if you want to map specific items in the dimension table to specific rows in the structure. When using dimension mapping, all row data is defined at the key column level of the dimension table, and each dimension item can only be assigned to a single row. The toggle switch shows as green when enabled and as gray when disabled. If this option is not enabled, then row data is determined by defining filter criteria statements at the row and section level. For more information, see Using dimension mapping versus row filters in a fixed row structure.



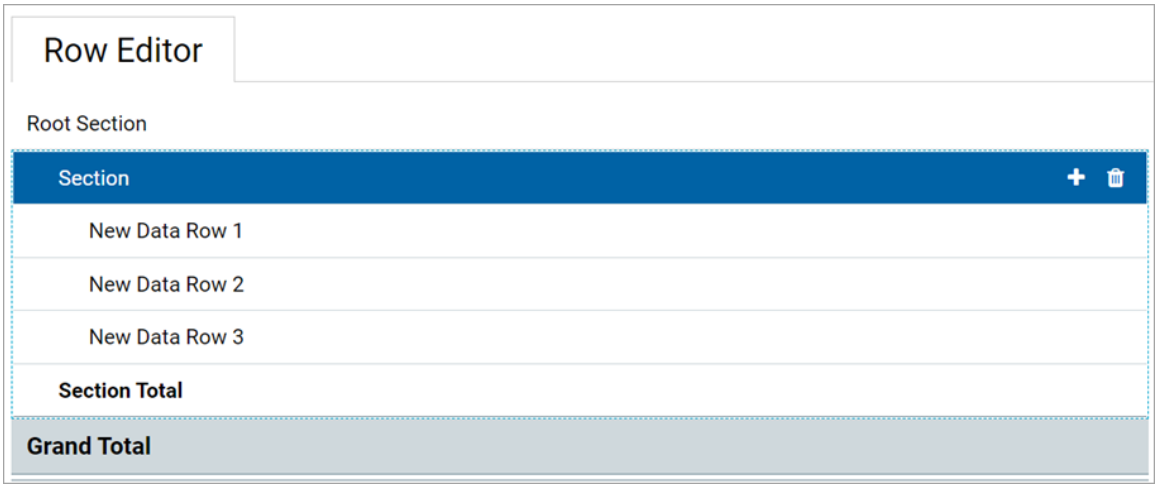
Example required properties with dimension mapping enabled

Once these items are completed, you can use the **Save** button to save the row structure.

3. In the left-hand row editor, add sections and data rows as desired to create the overall row structure. Think of the Root Section as the overall "wrapper" in which all row sections are placed. To create the first row section, click the plus icon on the **Root Section** header and then select **Add New Section**.



Your row structure will now look like this:



You can then continue to add data rows or additional sections:

- **To add a section**, select the section header where you want to add the section, then click the plus icon > **Add New Section**. The new section is added as a subsection to the current section. By default, all new sections contain a section header row, three data rows, and a total row. You can add or remove data rows as needed.
- **To add a data row within a section**, select the section header where you want to add the data row, then click the plus icon > **Add Data Row**. The new data row is added to the current section.

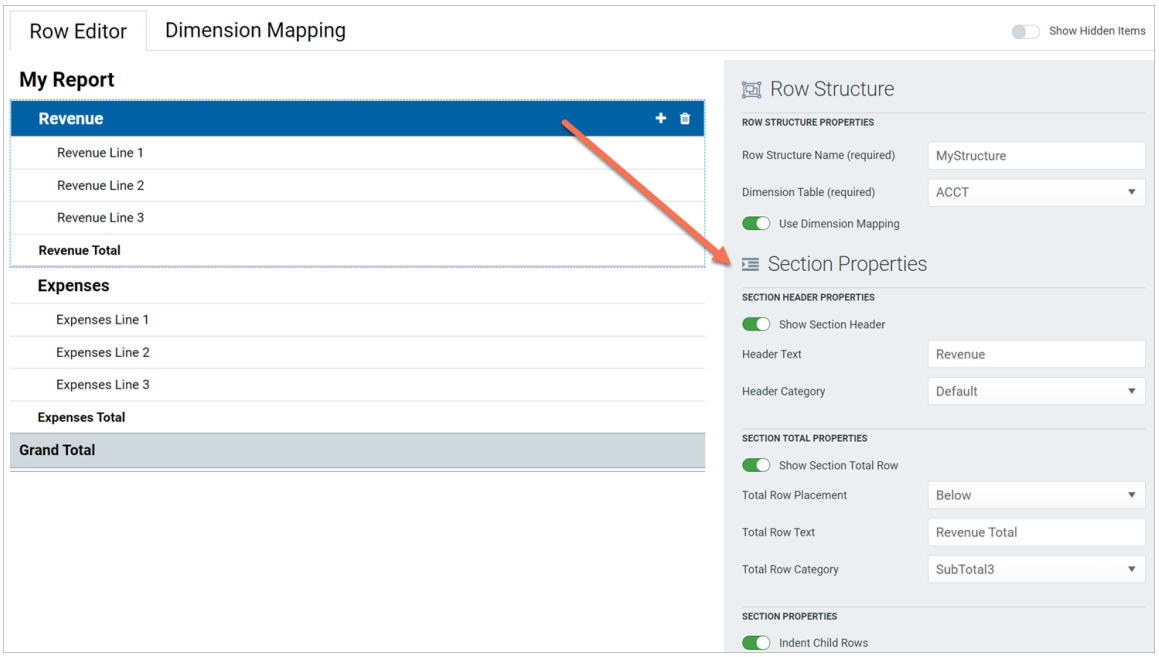
When you add a new data row or section, it is always added at the bottom of the current section. You can drag and drop the row or section to a different location within the section as needed (but not to a different section).

If a data row or a section is not needed, select the row or section header and then click the trash can icon. The row or section is deleted from the row structure.

NOTE: Header rows and total rows cannot be deleted from a section. The trash can icon on a section header row is used to delete the entire section, not the header row. If you do not want a particular section to display a header row or a total row, you can hide these rows on a per section basis using the Section Properties.

4. For each section in the report—including the Root Section—configure the properties for that section. To configure a section, select the section header and then complete the **Section Properties** in the right-hand panel. The section properties control the following:
   - Visibility, text, and style of the section header row
   - Visibility, text, placement, and style of the section total row
   - Whether data rows are indented from the parent section
   - Whether section data is added or subtracted when calculating the parent total
   - An optional data filter to apply to all data rows in the section (only available if the structure does not use dimension mapping)

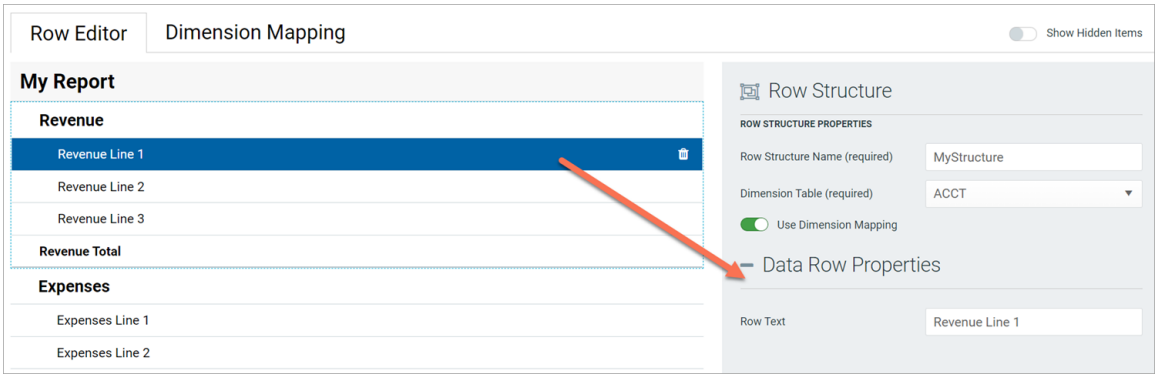
   For more information on all of the section properties, see Section properties.



In most cases, the row structure immediately updates to reflect section properties that affect the display. For example, if you define header text, that text is immediately shown on the row structure. However, if you hide the section header row, the row will continue to display in the row structure unless you disable the option **Show Hidden Items**. This option is located at the top right of the row editor, under the Save button. By default, the row editor continues to show hidden section headers so that you can use the Add Data Row and Add New Section actions on the header row.

5. For each data row in the report, configure the properties for that row. To configure a row, select the row and then complete the **Row Properties** in the right-hand panel.

   At minimum, the row properties define the label text for the row. If the structure does not use dimension mapping, then the row properties also define a data filter to determine the data to be shown on the row. For more information on defining the row properties, see Row properties.



6. If **Use Dimension Mapping** is enabled for the row structure, click the **Dimension Mapping** tab to map dimension elements to each row. This mapping determines the data to be shown on each row, instead of defining a filter. For more information on mapping dimension elements, see Using the Dimension Mapping editor.
7. Click **Save** to save the row structure.

When you are finished creating the row structure, you can close the browser tab and then return to the original Report Center tab.The new row structure can now be used when creating or editing web reports.

NOTE: If you go to the Fixed Row Structure node in the Report Center, you may not see your newly created row structure listed here until you refresh the page.

Copying fixed row structures

You can copy existing fixed row structures as needed to create additional fixed row structures.

In order to copy a fixed row structure, you must be an administrator or have the **Create Web Reports** security permission. If you do not have permission to create web reports, then the Copy icon on fixed row structures is disabled.

To copy a fixed row structure:

1. In the Report Center, select the **Fixed Row Structure** node and then locate the structure that you want to copy.
2. Hover your cursor over the row with the structure, then in the **Actions** column, click the Copy icon .
3. In the **Copy Fixed Row Structure** dialog, enter a **Name** for the new fixed row structure, then click **OK**. By default, the name is **Copy of *OriginalName***.

The fixed row structure is copied with the specified name. You can now open this fixed row structure for editing.

Editing fixed row structures

Any user can edit a fixed row structure. The **Create Web Reports** permission is not required.

Keep in mind that when a row structure is assigned to a report, that report always uses the most current version of the row structure. Any edits that you make to a row structure are immediately available in any reports that use the row structure.

To edit a fixed row structure:

1. In the Report Center, select the **Fixed Row Structure** node and then locate the structure that you want to edit.
2. Click on the row structure name to open it.

TIP: You can also click the Edit icon in the **Actions** column to edit the fixed row structure.

The row structure opens in the row structure editor, in a new browser tab.

3. Using the row structure editor, make changes to the row structure as needed.
4. Click **Save** to save your changes.

When you are finished editing the row structure, you can close the browser tab and then return to the original Report Center tab.

Deleting fixed row structures

Any user can delete a fixed row structure. The **Create Web Reports** permission is not required. If the fixed row structure was used by any web reports, those reports will no longer function correctly until they are edited to use a different fixed row structure.

IMPORTANT: If the deleted fixed row structure was used by a web report built from a template, that report will no longer work. Currently, there is no way to edit the row structure assignment for template-based reports. If the report is still needed, it must be re-created from template with a different fixed row structure.

To delete a fixed row structure:

1. In the Report Center, select the **Fixed Row Structure** node and then locate the structure that you want to delete.
2. Hover your cursor over the row with the structure, then in the **Actions** column, click the Delete icon .
3. When you are prompted to confirm that you want to delete the structure, click **OK**.

The structure is deleted from the system and no longer displays in the Report Center.

Using the Row Editor

Using the Row Editor, you can define fixed row structures for use in web reports. Fixed row structures define the following:

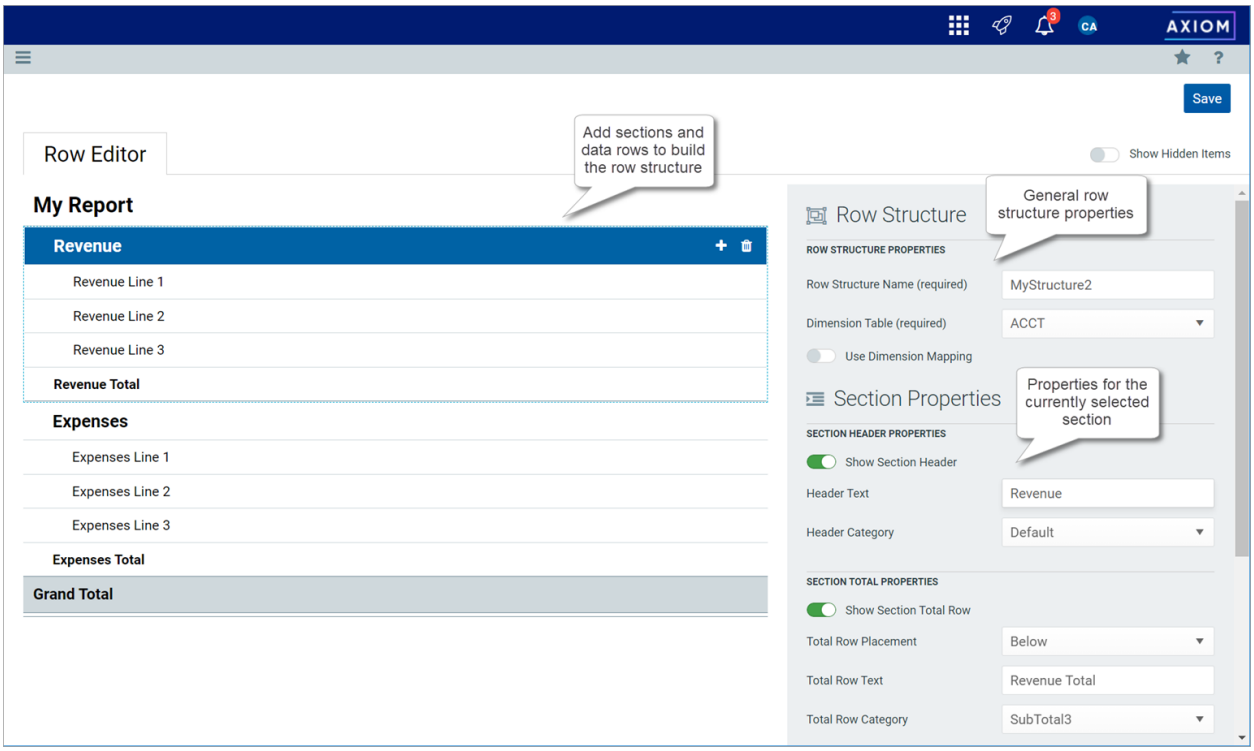
- The sections to be displayed in the report, including section titles and subtotal rows
- The data rows to be displayed within each section

When you use the Report Center to create a new fixed row structure or to edit an existing fixed row structure, it opens in the fixed row structure editor.

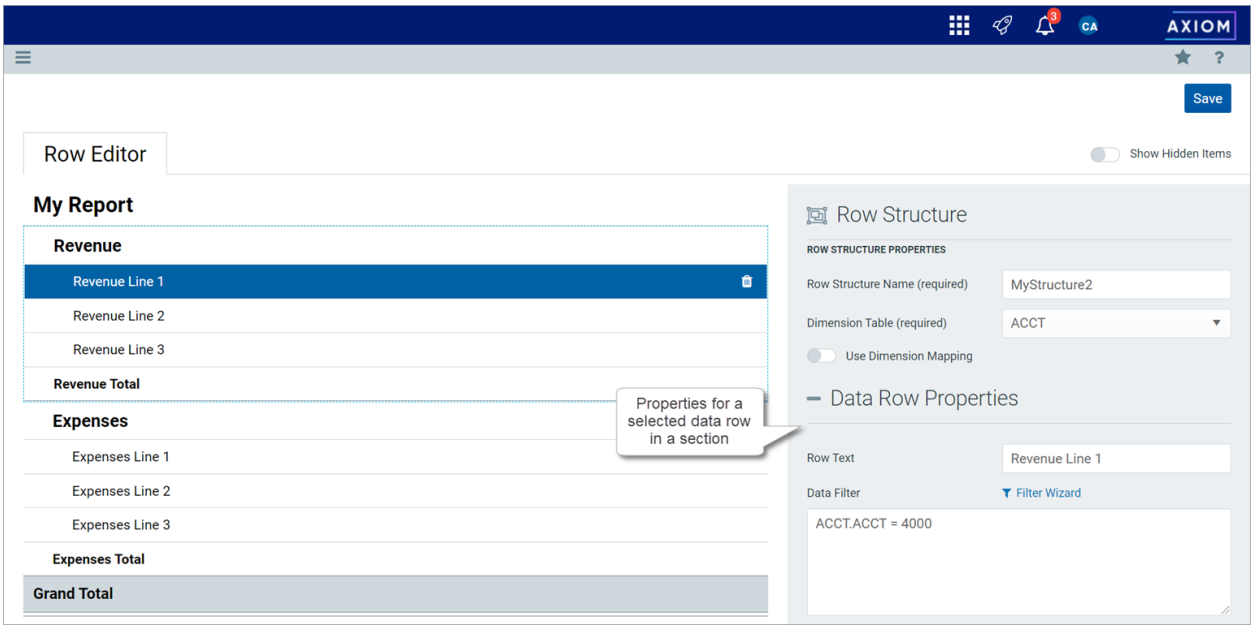
Overview

By default, the Row Editor consists of two primary areas:

- The section editor on the left-hand side, where you can add, reorder, and remove sections and data rows
- The property editor on the right-hand side, where you can define properties for the overall row structure, the selected section, or the selected row

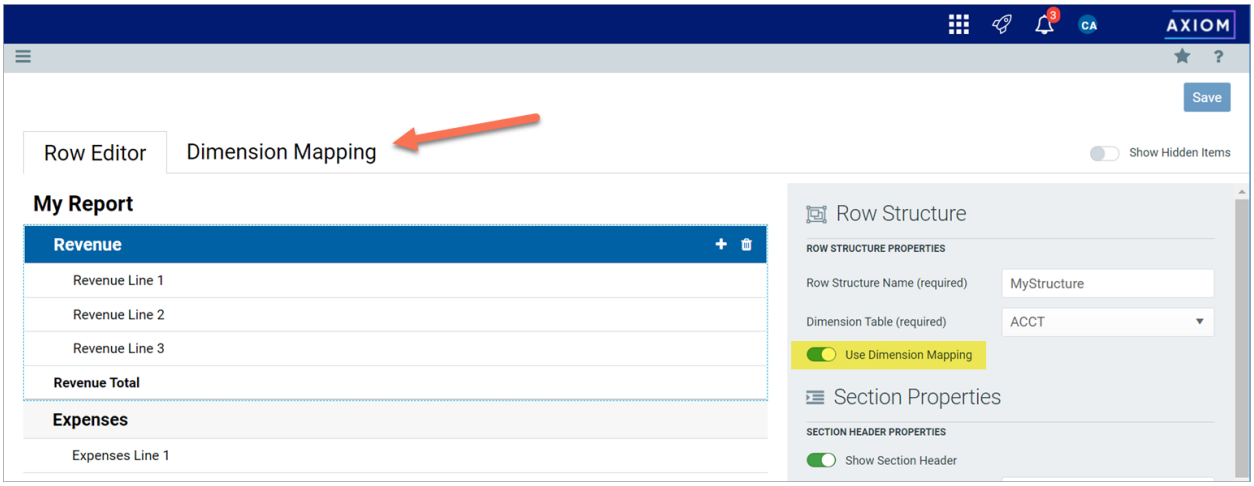


Row structure editor with a selected section



Row structure editor with a selected data row

If the row structure is configured to **Use Dimension Mapping** to define the row data, then another area is available via the **Dimension Mapping** tab. You can use the Dimension Mapping area to map dimension items to individual data rows. For more information on using dimension mapping, see Using the Dimension Mapping editor.



Row structure editor with Dimension Mapping tab

To save the row structure after making changes, use the **Save** button located at the top right of the editor.

Certain parts of the row structure can be configured as hidden, such as section header rows or total rows. By default, these hidden items no longer display in the editor. If you need to view these items so that you can work with them and configure them, you can toggle the option **Show Hidden items** at the top right of the editor.

Using dimension mapping versus row filters in a fixed row structure

When you build a fixed row structure, there are two different ways to define the data to be shown each in row:

- **Filters**: Each row can have a filter criteria statement that defines the data for that row. For example, `Acct.Acct=4100` or `Acct.Category='Revenue'`.
- **Dimension mapping**: Each row can be assigned one or more items in a specified dimension. For example, if Acct is the specified row dimension, then you can view the list of accounts and map them to specific rows in the report as needed.

The filter option is the most flexible way to build a fixed row structure, because:

- You can use any valid filter criteria statement to define the data in each row, including compound statements using AND or OR, and referencing any table (not just the specified dimension table).
- You can define filters at the section level, which then combine with all row-level filters in the section.
- You can repeat dimension elements within the row structure—for example, to create multiple sections that show revenue for different regions or lines of business.

However, because the filter option is more flexible, it also requires a more advanced level of knowledge about your data structures. You must take care not to create invalid or conflicting filters, and make sure that your filters result in the data that you want to display in the report.

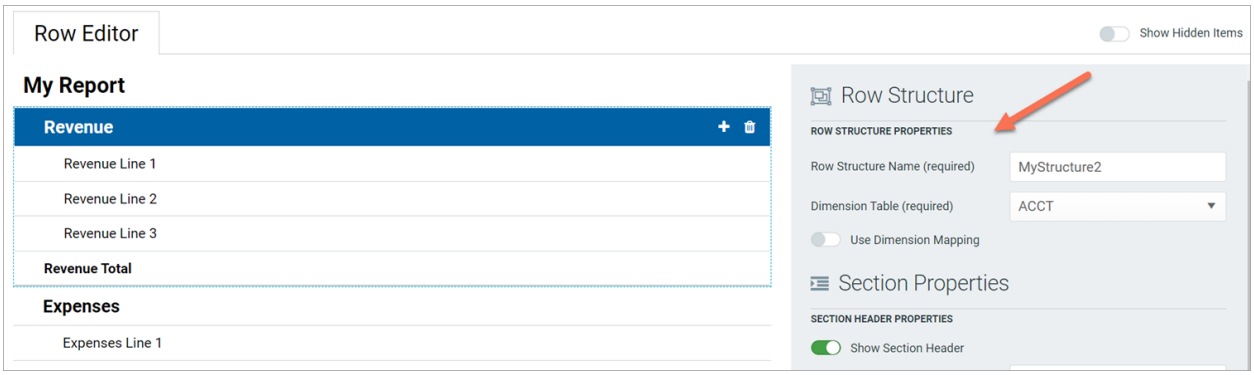
In contrast, the dimension mapping option is the easiest to set up, because:

- You are presented with a full list of all items in the specified dimension, which you can search and filter as needed.
- To assign an item to a row in the report, you simply select the item and then click the arrow button to move it over to the row. Each row can be assigned as many items in the dimension as needed.
- It is very easy to see exactly which dimension items will display on each row, and to see which items have not yet been assigned to rows.

However, the dimension mapping option is less flexible. Rows can only display data from the specified row dimension, and each item in the dimension can only be assigned to a single row.

Row structure properties

The following required properties at the top of the right-hand pane apply to the entire row structure.



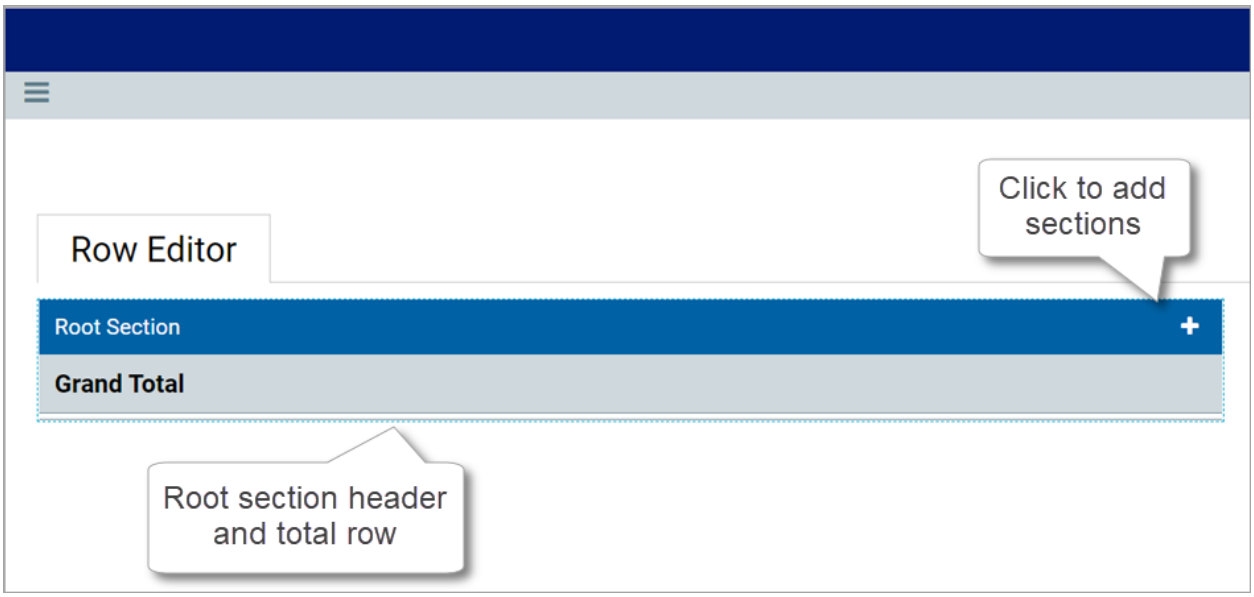
Example Row Structure properties area

Item	Description
Row Structure Name	The name of the row structure. The name identifies the row structure so that it can be selected when creating or editing a web report.
Dimension Table	The primary dimension table to be used on the data rows. You can select any reference table in your system. This selection is used as follows: • By default, it determines the table available to the Filter Wizard when defining filters for sections and data rows. For example, if the dimension table is Acct, then you can use the Filter Wizard to build filters based on Acct. **NOTE:** When using filters to define the data in sections and rows, the dimension table is simply a default table. If you want to define a filter using a different dimension, then you can manually enter a filter criteria statement using that dimension. • If **Use Dimension Mapping** is enabled, then it determines the dimension table for the row mappings. For example, if the dimension table is Acct, then you can map one or more accounts to each data row. In this case, data rows can only use the dimension table.

Item	Description
Use Dimension Mapping	Specifies whether the data in data rows is defined by using filters or by using dimension mapping. By default, this is disabled, so data is defined using filters. If instead you want to use dimension mapping for the rows, click the toggle switch to enable this option. The toggle switch shows as green when enabled and as gray when disabled. If **Use Dimension Mapping** is enabled, the row structure editor updates as follows: • A new tab named **Dimension Mapping** becomes available next to the **Row Editor** tab. You can use this tab to define dimension mappings for the rows. Typically, you should define the sections and rows in the structure first, then go to the **Dimension Mapping** tab to assign mappings to each row. • The **Filter** fields in the **Section Properties** and the **Row Properties** become hidden, because they do not apply when using dimension mapping. If a filter is defined for a section or a row before dimension mapping is enabled, the filter is retained in the properties (assuming it was saved) but it will be ignored in reports. For more information on the differences between using filters or dimension mapping to define data rows, see Using dimension mapping versus row filters in a fixed row structure.

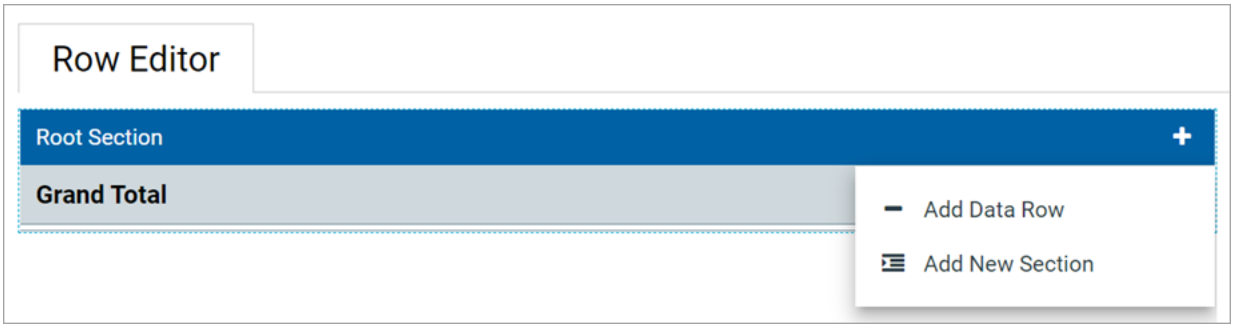
▶ Adding, removing, and reordering sections

Using the **Row Editor** tab, you can build your row structure by adding, removing, or reordering sections. Each row structure starts with a top-level root section that includes an optional header and an optional grand total.



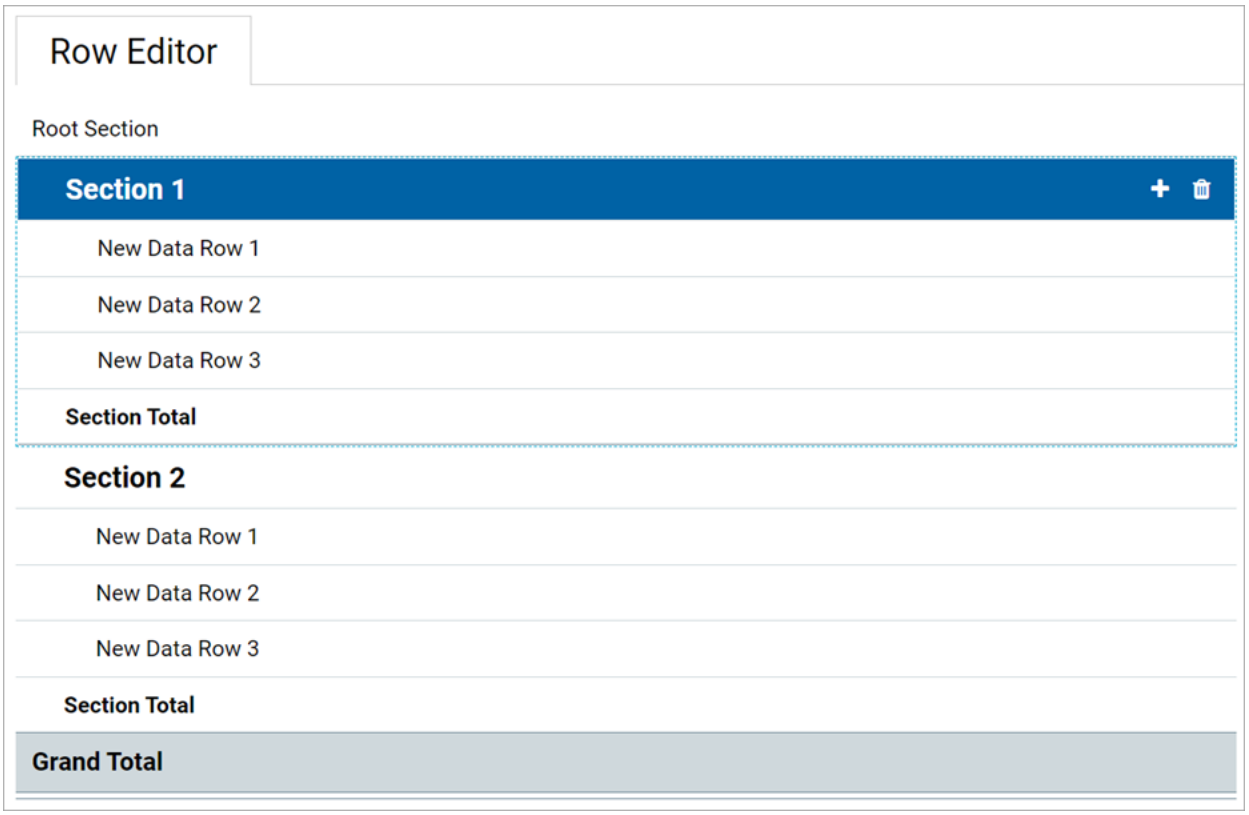
Row editor with starting root section

To add new sections to the row structure, select the section header row—the **Root Section** row—and then click the plus sign and select **Add New Section**.



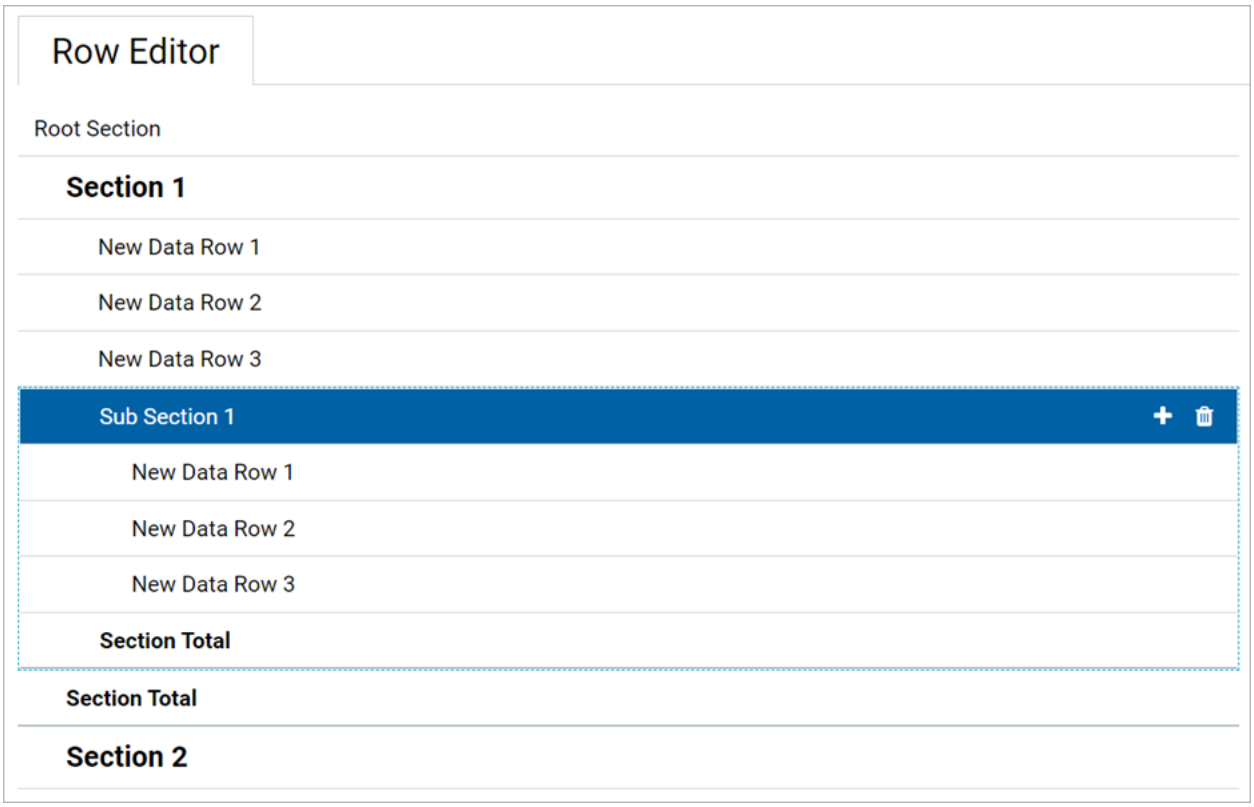
Option to add a new section

The new section is added within the root section. You can continue to add as many sections as needed at this level.



Row editor with two newly added sections

To add subsections within a section, select the section header row for any section, and then click the plus sign and select **Add New Section**. The new subsection is added to the current section. You can nest as many section levels as you need by adding subsections to sections.



Row editor with newly added subsection

Newly added sections use default text and styling, which can be configured for each section. Each newly added section consists of the following by default:

- A **header row** to display optional header text for the section. If you do not want a header row to display for a particular section (including the root section), you can hide it by disabling **Show Section Header** when configuring the section properties.
- Three **data rows** to display queried data in the section. You can add or remove data rows as needed.
- A **total row** to display the totaled data for the section. If you do not want a total row for this section (including the root section), you can hide it by disabling **Show Section Total Row** when configuring the section properties.

Once you have added sections, you can make further section changes as follows:

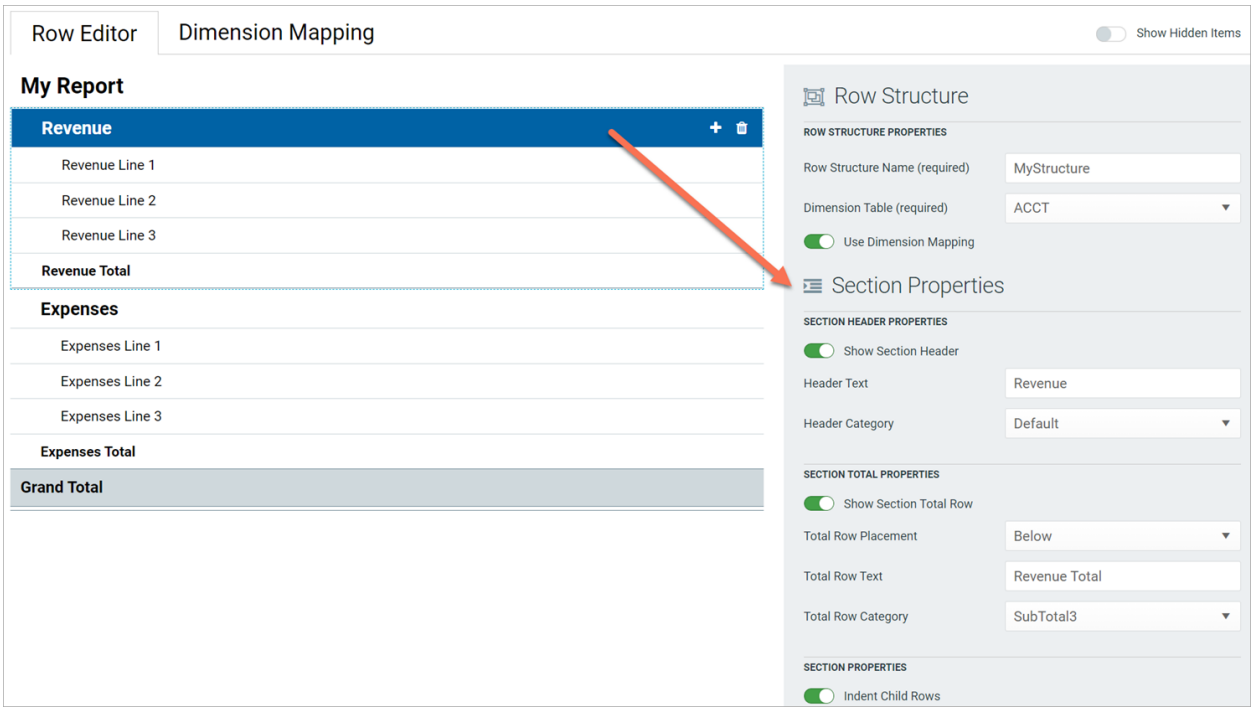
- **To reorder sections**: Select the header row of a section and then drag and drop it to a new location within the same level of the structure. For example, if you have three sections at the same level, you can drag and drop these three sections to change their order. But you cannot drag and drop one of these three sections to a lower level or a higher level.

- **To delete a section**: Select the header row of the section and then click the delete icon (trash can). The section and all of its subsections are deleted. Note that the root section is required and cannot be deleted.

  IMPORTANT: Make sure you no longer need the section before clicking the delete icon. The section will be deleted immediately with no confirmation prompt. If you deleted a section by accident, then you can exit the row structure editor without saving, but you will also lose any other unsaved changes that you have made during the current session.

Section properties

To configure the properties for a section, select the section header and then complete the **Section Properties** in the right-hand pane.



Example Section Properties area

Section Header Properties

Item	Description
Show Section Header	Specifies whether the section header row is visible when the row structure is used in a report. By default, this option is enabled, so the section header row is visible. If you do not want this section to have a header row, disable this option. The toggle switch shows as green when enabled and as gray when disabled. If this option is disabled, then the remaining section header properties become hidden because they do not apply. Note that you may want to define header text before disabling the option, to make it easier to identify the section when working within the row structure editor. **NOTE:** If you hide the section header, then you will no longer be able to select the header row in the editor for purposes of adding rows or subsections, configuring the section, reordering the section, or removing the section. If you need to work with the section header row, you can enable the option **Show Hidden Items**, located at the top right of the editor. This will cause all hidden items to show in the row structure, so that they can be selected and configured.
Header Text	The text to display on the section header row. By default, this is set to "Root Section" for the root section header and "Section" for all other newly added sections. The header text should be edited to reflect the data shown in this section.
Header Category	The style to use on the section header row. The style determines display attributes such as font size and font weight. Select one of the following: • **Header1** through **Header6**: These styles apply specific formatting to the header row. Although Header1 is designed to be used as the top-level section header, followed by Header2, and so on, you can assign these styles to any section header row as needed. • **Default**: Axiom automatically applies the appropriate header style depending on the section's placement in the row structure hierarchy. The header row for the root section uses Header1, sections in the next level use Header2, and so on. By default, the header category is set to **Header1** for the root section header, and **Default** for all newly added sections.

Section Total Properties

Item	Description
Show Section Total Row	Specifies whether the section total row is visible when the row structure is used in a report. By default, this option is enabled, so the section total row is visible. If you do not want this section to have a total row, disable this option. The toggle switch shows as green when enabled and as gray when disabled. If this option is disabled, then the remaining section total properties become hidden because they do not apply.
Total Row Placement	The location of the total row in the section, either **Below** the data rows or **Above** the data rows. The total row is located below the data rows by default.
Total Row Text	The text to display on the section total row. By default, this is set to "Grand Total" for the root section total and "Section Total" for all other newly added sections.
Total Row Category	The style to use on the section total row. The style determines display attributes such as font size, font weight, shading, and borders. Select one of the following: • **Grand Total** or **Total**: These styles are intended to be used for "final" total rows. Both styles use shading and top and bottom borders. The bottom border of the Grand Total is a double border. • **SubTotal1** through **SubTotal4**: These styles are intended to be used for subtotal rows. These options provide varying combinations of bold and regular text, shading or no shading, and border or no border. By default, the total row category is set to **Grand Total** for the root section total row, and **Subtotal3** for all newly added sections.

Section Properties

Item	Description
Indent Child Rows	Specifies whether the rows in this section are aligned with the section header row or indented. By default, this is enabled, so the rows are indented. If instead you want the rows to be aligned with the section header row, disable this option. The toggle switch shows as green when enabled and as gray when disabled.

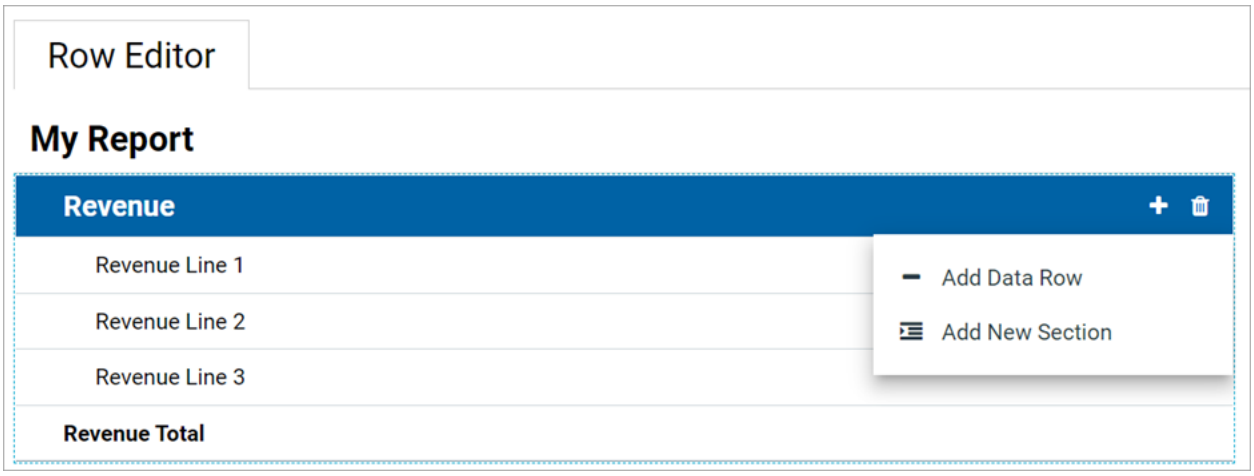
Item	Description
Parent Total Row Behavior	Specifies how the data in this section is treated when computing the total row of the parent section. Select one of the following: • **Add**: The data in this section is added when computing the parent total. This is the default behavior. • **Subtract**: The data in this section is subtracted when computing the parent total. • **Ignored**: The data in this section is ignored when computing the parent total. You might do this if the rows in this section contain supporting detail that should not impact the overall totals. Although this option displays on the root section, it does not apply because the root section does not have a parent section. For example, imagine that you have a parent section with two subsections. Subsection A totals 5000, and Subsection B totals 1000. • If both subsections are set to add, then the total of the parent section is 6000. • If Subsection A is set to add but Subsection B is set to subtract, then the total of the parent section is 4000. • If Subsection A is set to add but Subsection B is set to ignore, then the total of the parent section is 5000.
Section Data Filter	Optional. A data filter to apply to all of the data rows in this section, including any subsections. This is intended to be used when all rows in the section need to be filtered by a particular dimension or grouping, so that you do not need to repeat that dimension grouping on each individual data row. Only applies when **Use Dimension Mapping** is disabled. Enter the filter criteria statement to apply to the data rows in this section. Section data filters use normal filter syntax for Axiom. Although you can use the Filter Wizard to create the filter criteria statement, it is limited to creating filters based on the specified dimension table for the row structure. In many cases the section data filter needs to use a different dimension, so you must manually create the filter criteria statement. For example, imagine that you want to show revenue accounts in the rows of your report, but you want to split the data into two sections reflecting two different sales regions. You can create two sections and define section filters for each, such as `Dept.Region='East'` and `Dept.Region='West'`. All of the data rows in those sections will be filtered by the specified region in addition to the specific account filters listed on each row.

Adding, removing, and reordering data rows

Using the **Row Editor** area, you can add data rows to a section, remove unneeded rows, and reorder rows. Each data row represents a record of data that you want to query from the database and display within the report.

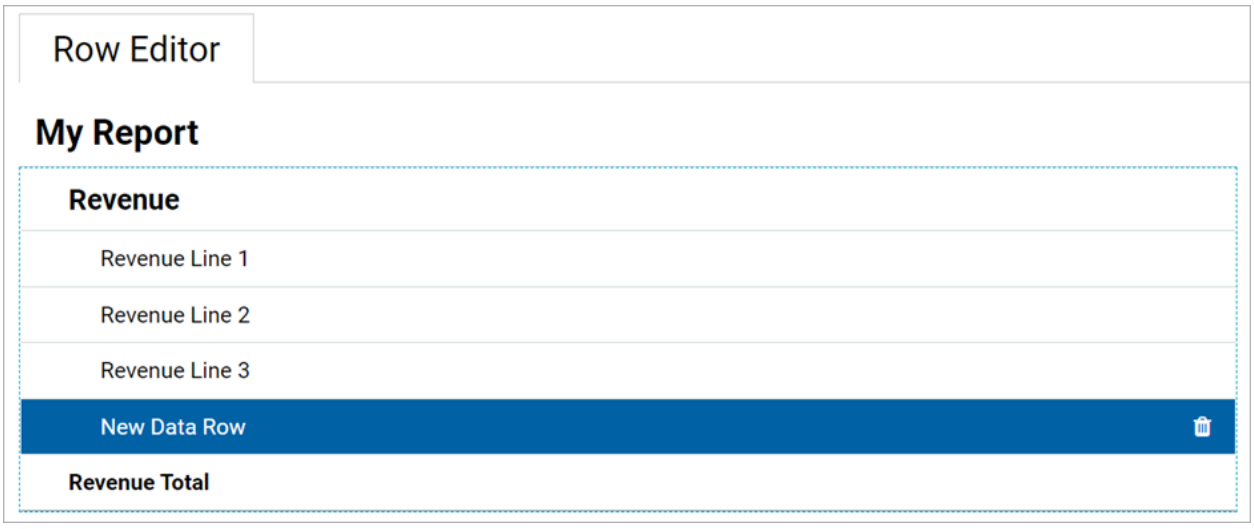
To add new data rows to a section:

- Select the section header row, then click the plus sign and select **Add Data Row**.



Option to add a new data row

The new row is added to the bottom of the section. You can continue to add as many new rows to the section as needed.



Section with a newly added data row

Once you have added data rows, you can make further row changes as follows:

- **To reorder rows**: Select the data row that you want to move, and then drag and drop it to a new location within the same section. For example, if you want a newly added row to be at the top of the section instead of the bottom, then you can drag and drop it to that location. But you cannot drag and drop the row to a different section, not even to subsections of the current section.
- **To delete a row**: Select the data row that you want to delete and then click the delete icon (trash can). The row is deleted.

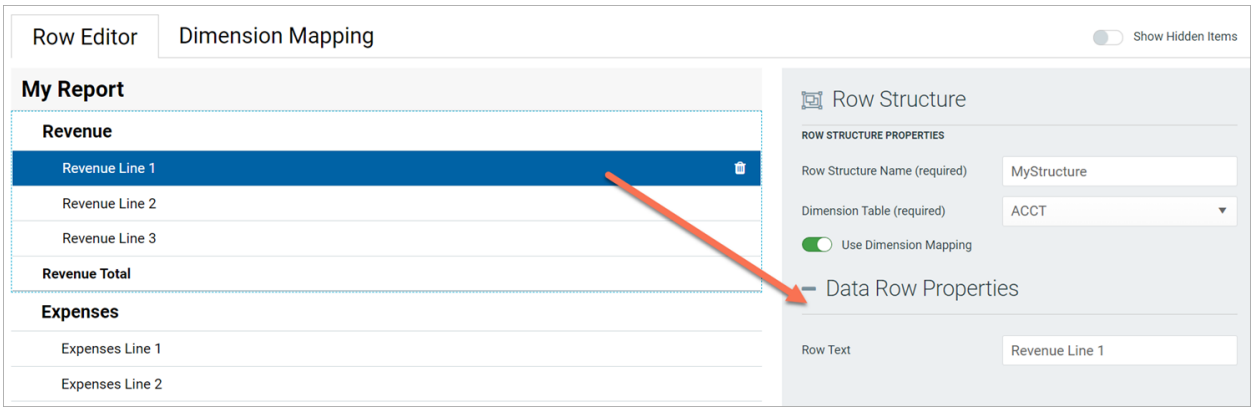
  IMPORTANT: Make sure you no longer need the row before clicking the delete icon. The row will be deleted immediately with no confirmation prompt. If you deleted a row by accident, then you can exit the row structure editor without saving, but you will also lose any other unsaved changes that you have made during the current session.

Only data rows can be individually added, deleted, and reordered. Section header rows and section total rows are not considered to be data rows and are managed as part of the section. Note the following:

- The delete icon on section header rows does not delete the header row; it deletes the entire section. If you do not want a particular section to have a header row, you can configure the section to hide the header row.
- Section total rows do not have delete icons. If you do not want a particular section to have a total row, you can configure the section to hide the total row.
- Section header rows are always located at the top of the section. When you drag and drop a section header row you are moving the entire section, not just the header row. It is not possible to move just the header row.
- Section total rows can be located at either the top or bottom of the section, but not by dragging and dropping. When you configure the section, you can specify the location of the total row.

Row properties

To configure the properties for a data row, select the row and then complete the **Row Properties** in the right-hand pane.



Example Row Properties area

Item	Description
Row Text	The text to display on the data row. By default, this is set to "New Data Row". The row text should be edited to reflect the data shown on this row. For example, if this row is going to display data for the Travel account, the row text should be something like "Travel" or "Account 5000 - Travel".
Data Filter	A filter criteria statement to define the data to query into this row. Only applies when **Use Dimension Mapping** is disabled. If dimension mapping is enabled, then use the Dimension Mapping tab to map the data for this row. Row filters use normal filter syntax for Axiom. You can type the filter, or you can use the **Filter Wizard** to create a filter based on the specified Dimension Table for the row structure. For example, if the data filter is `Acct.Category='Revenue'`, then this row will display data for all revenue accounts when this row structure is used in a report. The specific data returned will depend on the data columns used in the report, and any other filters applied to the report. Each row's data filter is independent from any other row, and does not need to use the same grouping level or even the same dimension as other rows. For example, one row can be `Acct.Acct=4000`, while another row is `Acct.Category='Marketing'`, and a third row is `Fcst.Acct=670`. However, keep in mind the following: • If you use the Filter Wizard to make the filter, it is limited to the table selected as the **Dimension Table** for the row structure. If you want to use a different table for a particular row, you must manually write the filter. • Although there are no restrictions on the individual row filters, all of the filters used must be compatible with the eventual primary table selected for the report, when the fixed row structure is used in a report.

If the row uses a data filter, then the row's data filter will be combined with any upstream section data filters (using AND). For example, imagine the row structure has sections and rows configured as follows:

Parent Section Filter	`Dept.Company='Company A'`
Current Section Filter	`Dept.Region='US West'`
Row Filter	`Acct.Acct=4000`

Then the data for this row is determined as follows:

```
Dept.Company='Company A' AND Dept.Region='US West' AND Acct.Acct=4000
```

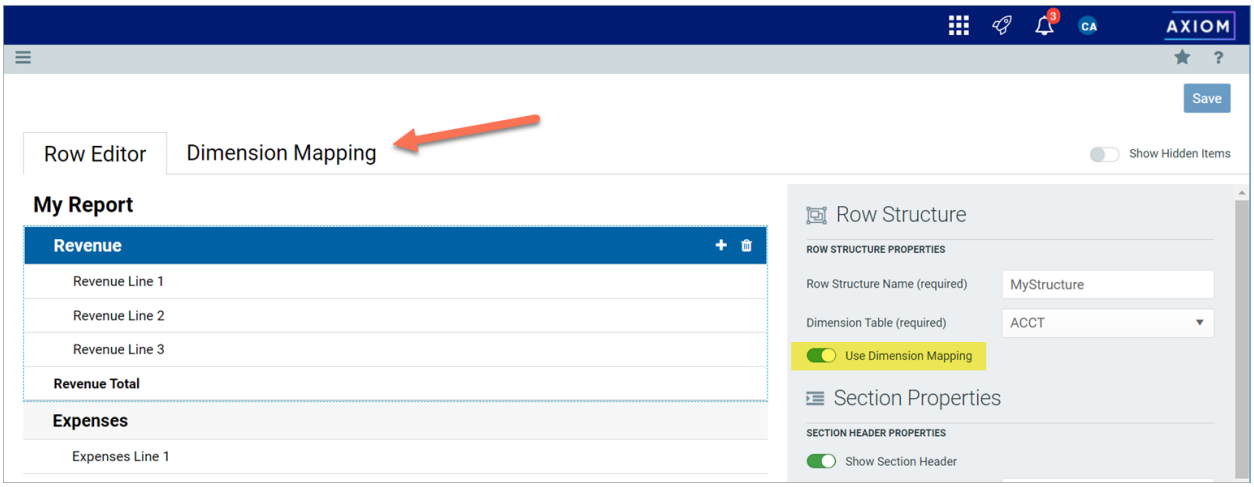
Using the Dimension Mapping editor

Using the Dimension Mapping editor, you can assign dimension items to specific rows of a fixed row structure. When the row structure is used in a web report, the rows will display data for the assigned dimension items.

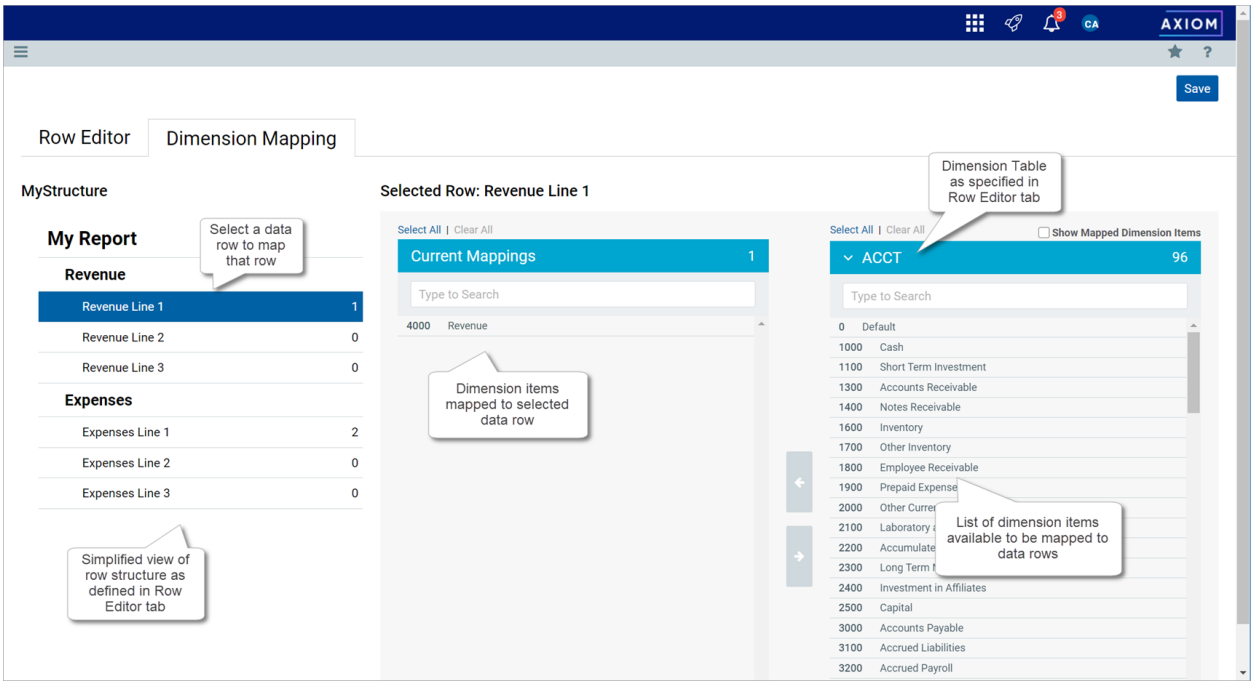
For example, if the row dimension is Acct, you can assign one or more accounts to each row in the row structure. If a row is assigned Acct 4000, then that row will display data for Acct 4000, for each of the columns used in the report.

Dimension Mapping editor overview

The Dimension Mapping editor is only accessible when creating or editing a row structure. If **Use Dimension Mapping** is enabled for the row structure, then a **Dimension Mapping** tab displays next to the **Row Editor** tab. You can click this tab to open the Dimension Mapping editor and assign dimension items to each row.



Dimension Mapping tab available in row structure when Use Dimension Mapping is enabled



Example Dimension Mapping editor

- The left side of the Dimension Mapping editor displays a simplified view of the row structure defined on the **Row Editor** tab. You can select a data row in the row structure in order to map dimension items to that row.
    - Each data row must be assigned at least one dimension item when using dimension mapping. It is not possible to mix use of data filters and dimension mappings.
    - The number to the left of the row label shows how many dimension items have been assigned to that row.
- The two columns on the right side of the Dimension Mapping editor are used to map dimension items.
    - The **Current Mappings** column in the middle of the page shows the dimension items mapped to the currently selected data row.
    - The dimension column on the right side of the page shows the remaining unmapped dimension items. The dimension used for the mappings is determined by the specified **Dimension Table** in the **Row Editor** tab. In this example, the dimension table is **Acct** and the column shows the list of accounts defined in that table.
    - You can use the arrow buttons between the columns to move dimension items from the dimension column to the Current Mappings column and vice versa.

Each dimension item can only be assigned to a single row in the row structure. Once a dimension item is moved to the Current Mappings column, it is removed from the list of unmapped dimension items and cannot be assigned to another row.

Assigning dimension items to data rows

Each data row in the row structure must be assigned at least one dimension item. When the row structure is used in a report, the dimension mappings determine what data displays in each row.

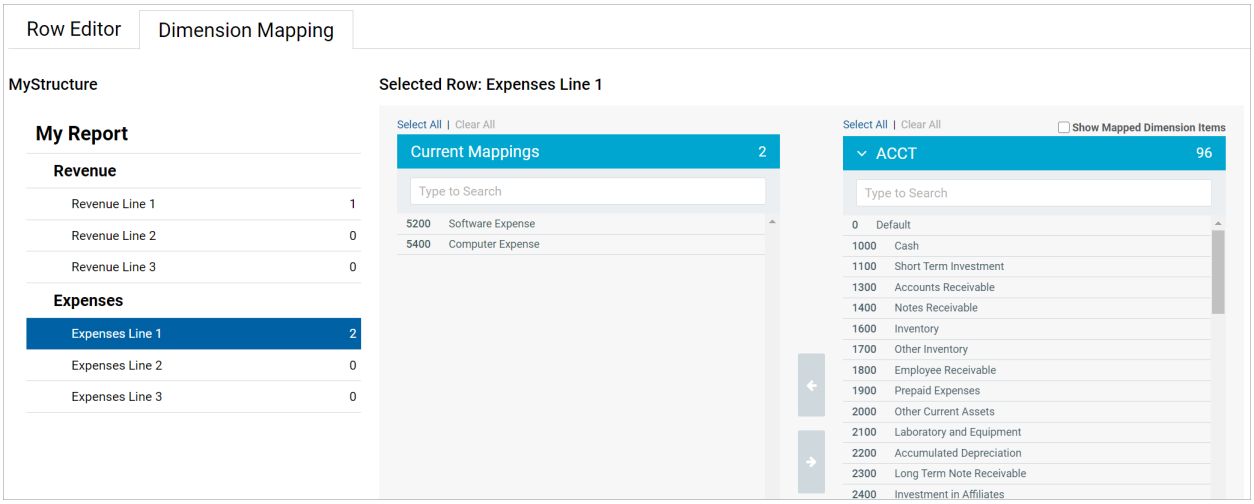
To assign one or more dimension items to a data row:

1. In the row structure on the left side of the page, select the data row that you want to map. If any dimension items are already mapped to this row, those dimension items display in the **Current Mappings** column.
2. In the dimension column on the right side of the page, select the dimension item or items that you want to map to the data row.
   - Click a dimension item once to select it. If you select a dimension item by accident, click it again to de-select it.
   - Note that using the Shift key or the CTRL key to select multiple dimension items at once does *not* work here. You must individually click on each dimension item that you want to assign.

   You can search and filter the dimension list to help find the desired dimension items.
3. Once all of the dimension items that you want to assign are highlighted, click the left arrow to move the selected dimension items to the **Current Mappings** column.

If you want to remove a mapped dimension item from a data row, you can select the item in the Current Mappings column and then click the right arrow to move it back to the dimension column.

In the following example, two accounts have been mapped to the Expenses Line 1 data row. When this row structure is used in a report, this row will display summed data for the Software Expense and Computer Expense accounts. (In a real report, the label text for this data row would likely be defined as "Software and Computer Expenses" or something similar.)



Example data row with mapped dimension items

The two accounts that are mapped to this data row no longer display in the dimension column and cannot be mapped to any other row. You can optionally enable **Show Mapped Dimension Items** to see all items in the dimension column, but mapped items will display as grayed out and cannot be selected.

Searching and filtering the dimension column

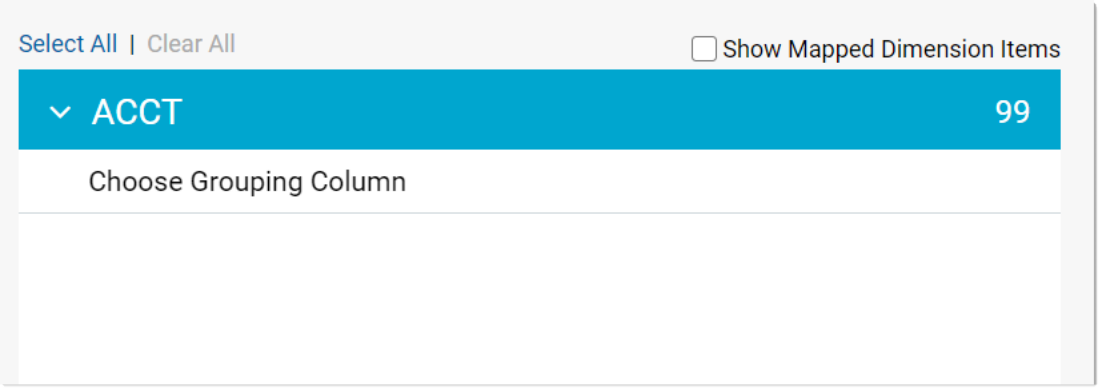
You can search and filter the dimension column to more easily find the dimension items that you want to map.

- You can type into the search box at the top of the column to find items by dimension value. The search matches any dimension value that contains the search text. Currently, the description text is not included in the search.
- You can select a grouping column so that the dimension column is filtered to only show values for a particular grouping. For example, you may have a grouping column of Category, which you can use to show accounts within a particular category—such as Revenue, Capital, or Marketing.

If you use **Select All** when the list is filtered by a search or by a grouping value, then only the currently visible items are selected. This can be a convenient way to find, select, and map multiple dimension items at a time.

To filter the dimension column by a grouping value:

1. Click the down arrow icon in the column header, and then click **Choose Grouping Column**.

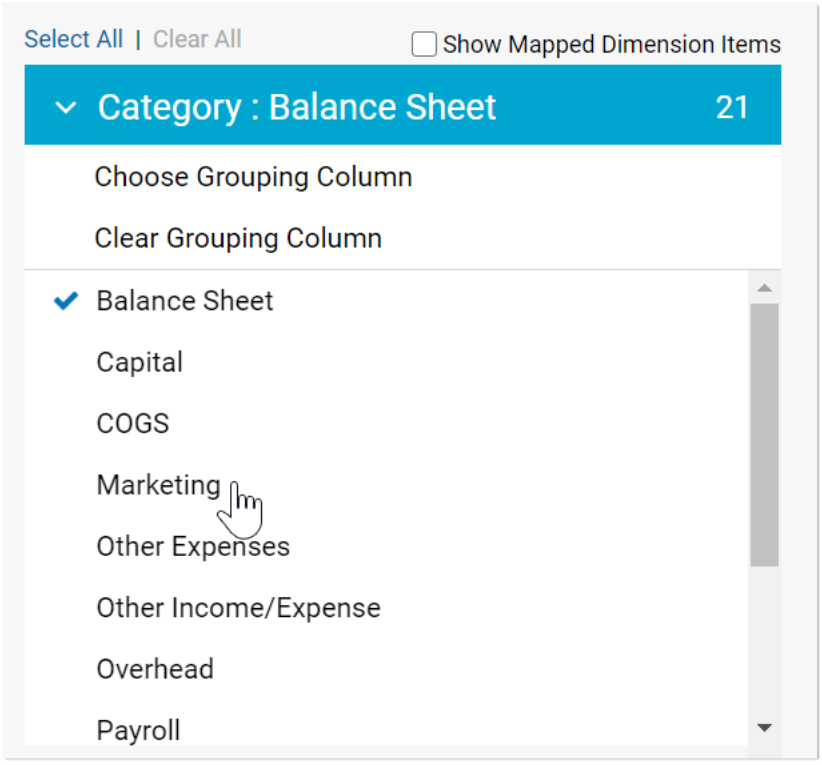


2. In the **Choose a Grouping Column** dialog, select the grouping column that you want to use, and then click **OK**.

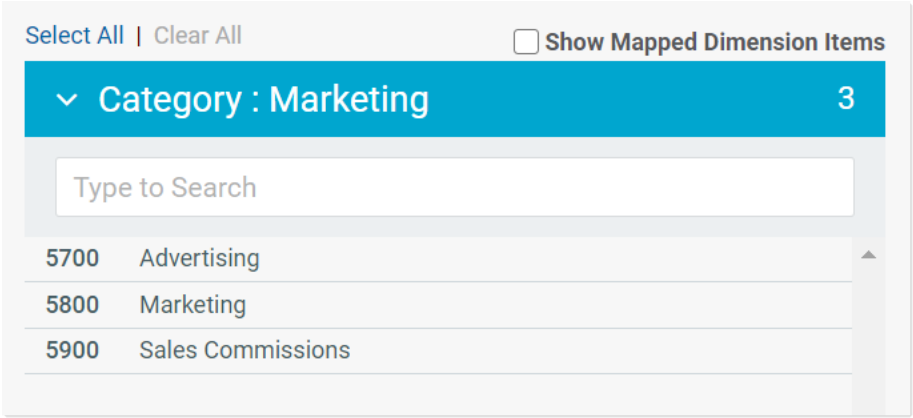
   The dimension column becomes filtered by the first value in the selected grouping column. This value displays in the column header.

3. To filter the dimension column by a different value in the grouping column, click the down arrow icon in the column header, and select the desired value.

   In the following example, "Balance Sheet" was the automatically-selected value from the grouping column, and we are now going to select "Marketing" instead.



The dimension column is now filtered to only show accounts that belong to the Marketing category.

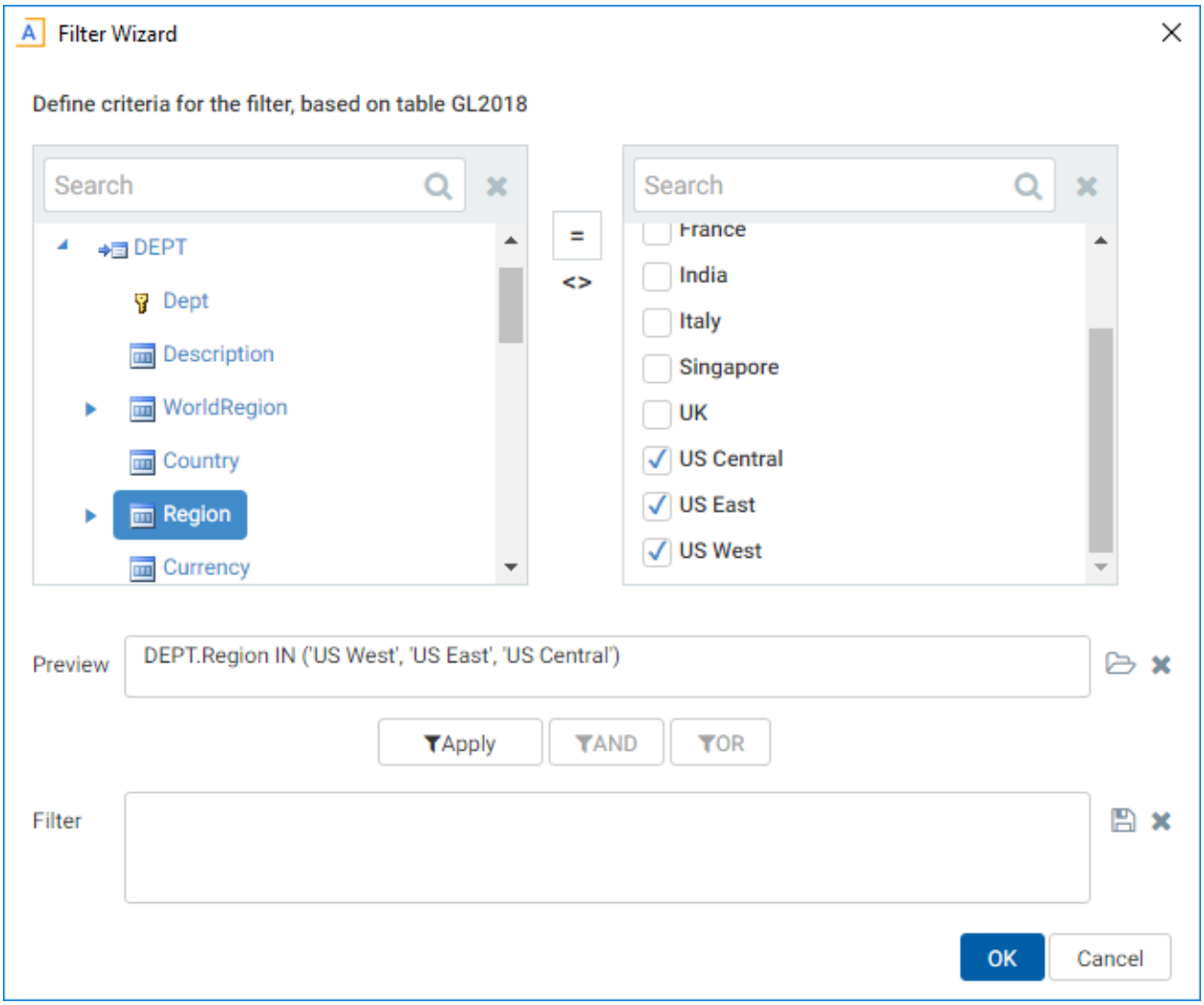


If you want to clear the grouping column filter, click the down arrow icon in the column header, and select **Clear Grouping Column**.

Reference

Using the Filter Wizard

The Filter Wizard is available in various locations to assist you in building a valid filter criteria statement.



Example Filter Wizard

The tables available in the wizard depend on the current context. For example, if you are creating a data filter for a web report, the wizard only shows valid tables in relation to the specified primary table. In other areas, the tables in the wizard may be limited based on other factors.

To create a filter:

1. In the left-hand side of the dialog, select the table column on which you want to base the filter.

   For example, if you want to create a filter such as `DEPT.DEPT>=5000`, then you must select the DEPT column from the DEPT table.

   To find the desired table and column, you can filter the list by typing into the Search box. The filter matches based on table and column names.

   Once you select a table column, the values in that column display in the right-hand side of the dialog.

   > **TIP:** Alternatively, you can use the folder icon to the right of the **Preview** box to load a previously saved filter from the Filters Library. If you do this, your selected filter is placed in the Preview box, overwriting any current content in the preview. Skip to step 4.

2. In the right-hand side of the dialog, select the value(s) on which you want to base the filter.

   You can type into the filter box below the list of values to filter the list. Your current typed value is always placed at the top of the list. You can select this typed value regardless of whether it currently matches an actual value in the column. This behavior is to allow you to create a filter for empty tables, or for tables where the value you want to filter on is not yet present in the column. This is why you may see the "no matches" message but still have one value in the list—your typed value.

3. In the space between the two selection boxes, select the operator to use for the filter criteria statement, such as equals, not equals, greater than, or less than. By default, the filter statement uses equals (=).

   Note the following about filter operators:

   - Greater than / less than options are only available if the column data type holds numbers or dates.
   - If multiple items are selected, then IN and NOT IN syntax is automatically used for equals and not equals respectively.
   - If the column is a string column and the value contains an apostrophe (such as O'Connor), the wizard automatically converts this value to double apostrophes so that it is valid for use in the filter (O''Connor). Apostrophes in string values must be escaped this way so that they are not interpreted as the closing apostrophe for the filter criteria statement.
   - The LIKE operator is supported, but is not available for selection in the Filter Wizard. You must manually edit the filter criteria statement if you want to use it. Only advanced users with knowledge of valid SQL LIKE syntax should do this.

4. Review the filter criteria statement in the **Preview** box to ensure that it is as intended. If you need to make changes, you can manually edit the statement, or you can start again with a new statement. If you want to clear the statement, click the **X** icon to the right of the Preview box.

   For more information on valid syntax, see Filter criteria syntax.

5. If no filter is currently present in the **Filter** box, click **Apply** to move the filter down to the Filter box. If a filter is currently present in the Filter box, you can do one of the following:
   - Click **Replace** to overwrite the current filter with the preview filter.
   - Click **AND** or **OR** to add the preview filter to the current filter. This creates a compound criteria statement.

   You can repeat the filter creation process as many times as necessary to create the desired statement. You can also manually modify the filter in the Filter box as needed, such as to add parentheses to group statements.

6. When the filter in the Filter box is complete, click **OK**.

   TIP: If you want to save the filter you have created for future use, click the save icon to the right of the Filter box. You can select a folder location in the Filters Library (or My Documents if applicable), and specify a name for the filter. This option is only available if you have read/write access to at least one location where filters can be stored.

Filter criteria syntax

Several areas of Axiom use criteria statements to define a set of data. The syntax for these criteria statement is as follows:

```
Table.Column='Value'
```

- *Table* is the name of the database table.
- *Column* is the name of the column in the database table.
- *Value* is the value in the column.

If the column is String, Date, or DateTime, the value must be placed in single quotation marks as shown above. If the column is Numeric, Integer (all types), Identity, or Boolean, then the quotation marks are omitted.

For example:

- To filter data by regions, the filter criteria statement might be: `DEPT.Region='North'`. This would limit data to only those departments that are assigned to region North in the Region column.
- To filter data by a single department, the filter criteria statement might be: `DEPT.Dept=100`. This would limit data to only department 100.

If the table portion of the syntax is omitted, then the table is assumed based on the current context. For example, if the filter is used in an Axiom query, then the primary table for the Axiom query is assumed. If the current context supports *column-only syntax*, and the specified column is a validated key column, then the lookup table is assumed.

Operators

The criteria statement operator can be one of the following: =, >,<,<>,<=,>=. Greater than or less than statements can only be used with numeric values. For example:

```
ACCT.Acct>1000
```

SQL IN and LIKE syntax can also be used. For example:

```
DEPT.Region IN ('North','South')
```

Compound criteria statements

You can use `AND` and `OR` to combine multiple criteria statements. If you are creating long compound criteria statements with multiple ANDs or ORs, you can use parentheses to group statements and eliminate ambiguity. For example:

```
(DEPT.Region='North' OR DEPT.Region='South') AND (ACCT.Acct=100 OR
ACCT.Acct=200)
```

NOTES:

- When filtering on multiple values in the same column, you must use OR to join the statements, not AND. In the example above, if the statement was instead `DEPT.Region='North' AND DEPT.Region='South'`, that statement would return no data because no single department belongs to both the North and South regions. When you use OR, the statement will return departments that belong to either the North or the South regions.
- Alternatively, you can use the SQL IN syntax to create a compound statement for values in the same column. For example, the statement `DEPT.Region='North' OR DEPT.Region='South'` can also be written as `DEPT.Region IN ('North','South')`. The Filter Wizard uses IN syntax by default.

Using criteria statements in functions

If you are using a criteria statement in a function, such as GetData, you must place the entire criteria statement in double quotation marks. For example:

```
=GetData("Bud1","DEPT.Region='North'","GL1")
```

You can also place the criteria statement in a cell and then use a cell reference in the function. In this case, you do not need to use double quotation marks in the function, unless you are concatenating text and cell reference contents within the function.

Referencing blank values in filters

If a string column contains a blank value, you may want to create a filter that includes or excludes records with these blank values. For SQL Server, the blank value is stored as an empty string. This empty string is indicated with empty quotation marks in the filter. For example: `ACCT.CMAssign=''` or `ACCT.CMAssign<>''`

If you use the Filter Wizard to construct the filter, it will automatically use the appropriate syntax.

Referencing values with apostrophes in filters

If a string column contains a value with an apostrophe (such as O'Connor), then that apostrophe must be escaped with another apostrophe so that it is not read as the closing apostrophe for the filter criteria statement. For example:

`Dept.VP='O'Connor'`

Invalid. This construction does not work because Axiom reads it as Dept.VP='O' and then does not know what to do with the rest of the text.

`Dept.VP='O''Connor'`

Valid. The extra apostrophe tells Axiom that the apostrophe is part of the string value and is not the closing apostrophe.

NOTE: This syntax must use two apostrophe characters in sequence and *not* a double quotation mark. If you create the filter using the Filter Wizard, Axiom will construct the appropriate syntax for you.

Referencing Date or DateTime values in filters

If your locale uses a date format where the first value is the day, filters using that date or date-time value will not process correctly. Instead, the date or date-time value must be in standard format. Standard format is `YYYY-MM-DDTHH:MM:SS` for DateTime and `YYYY-MM-DD` for Date.

If you use the Filter Wizard to construct the filter, it will automatically convert the date or date-time value to the appropriate syntax.

Index