# AssetW**O**RKS

## **Ad Hoc Reporting**

User Interface Guide

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Website: <u>Community.AssetWorks.com</u>

The support website can be used to open issues, subscribe to user groups, and download documentation, as well as to access the latest AssetWorks news. For secure access to the website, contact Customer Support by calling the number above.

## Ad Hoc Reporting User Interface Guide

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### **Overview**

The Ad Hoc Reporting tool allows users to create and execute their own customized reports within the M5 application. It is available as an add-on license.

The Ad Hoc Reporting tool must be licensed and installed as part of the M5 application. There is specific Ad Hoc Reporting application user security that must be configured prior to using this feature.

Ad Hoc enables you to access views of the M5 data to quickly transform raw data into useful and readily understood information.

You can:

- Extract the information you need from one or more related views.
- Format data into reports, charts, pivots, and gauges.
- View the resulting report and then print it.
- Export reports in several formats, including Microsoft Word, Microsoft Excel, and Adobe PDF.
- Implement custom layout reports through Forms.

## **Setup and Configuration:**

Please see the *M5* Ad Hoc Izenda Install Guide for more information regarding setup and configuration for the Ad Hoc module.

If this is your first time using Ad Hoc after the install OR you have just installed a new M5 patch update, please see the <u>Ad Hoc Query Admin</u> section of this document for synchronization instructions.

Ad Hoc permissions and access levels are configured using the following frames within the application:

- Role Maintenance
- Application User Maintenance
- Ad Hoc Group Maintenance

Ad Hoc maintenance and upkeep (system admin level) activities are carried out on the following frames within the application:

- Ad Hoc Object Maintenance
- Ad Hoc Query Admin
- Legacy Ad Hoc Query

## Settings tab

■ Reports +	+ Settings		-   <b>4</b>   9
X Others			Save Cancel
	Name	Value	
	Sort Column Name		C
	Trim Time In Joins		C
	Timezone for Data Offset	0	C
	Timezone for Timestamp Offset	0	C
	Convert Null to Empty String		C
	Show Schema Name	0	C
	Show Introduction Text	0	C
	Send to Disk Path		C
	Determine common filter for the same field based on	<ul> <li>Same field of the same data object from the same DB schema</li> </ul>	C
		<ul> <li>Same field name regardless of DB schema or connection string</li> </ul>	
		$\bigcirc$ Same alias name regardless of DB schema or connection string	
	Hide report header and footer by default	0	C

Field	Description
Sort Column Name	If true (selected), then sort by position in database. If false (cleared), then sort in alphabetical order.
Trim Time in Joins	Sets whether joins using Date Time fields will use the time portion of the field.
Time Zone for Data Offset	Set the value indicating time zone offset for database data in Report Designer/viewer/dashboard for hours entered.
Convert Null to Empty String	If selected, system displays blank for any field containing NULL and blank for any field containing blank.
Show Schema Name	Select to show schema name together with data source name.
Show Introduction Text	Select to show introduction text in Report Designer on data source tab.

Field	Description
Send to Disk Path	Sets the path where files will be saved for any scheduled instances with a Send to Disk location specified.
Determine common filter for the same field based on	Choose how the system should consider whether different filters are to filter the same field or not so that they are eligible to be considered a common filter on the Dashboard tab.
Hide report header and footer by default	Select to hide report header and footer by default in Report Designer and Report Viewer.

## **Report Designer**

The Ad Hoc Report Designer tab is accessed by searching for the *Ad Hoc Query* frame in M5 and navigating to that frame. Select the **Reports** tab to access the designer.

The report designer allows you to create, modify reports, and preview reports.

- There are two tabs at the top of the Ad Hoc Query page: **Reports** and **Dashboards**.
- To view a list of available, previously created reports, select the **Reports** tab.
- To create a new report, select the + icon on the **Reports** tab.

	🗟 Reports 🕂 🙊 Dashboards 🕂	•   <b>4</b>   <b>0</b>
«	All Vearch Q	Sort by Report Name - 12 🖬 🖬
REPORTS TEMPLATES	LOCAL CATEGORIES	•
ALL REPORTS	SHARON	
Local Categories 👻	Sharon Test 1 Trying out Adhoc 7	Created By: Sharon Henry O Last Edited: 12/23/2019
Sharon Ø	sgh - test 2	Created By: Sharon Henry O Last Edited: 10/16/2019
Uncategorized	TEST REP 987 - TEST SUB 987	
	Mac tester 2	Created By: Mac Breuer OLAst Edited: 09/17/2019
	PETES REPORT	Created By: Peter Corbett Orbett
	PETES REPORT	Created By: Peter Corbett Ottation Corbett
	PETES REPORT	Created By: Peter Corbett Older Corbett
	tester mac report	Created By: Mac Breuer O Last Edited: 09/17/2019
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## 1. Data Sources

The Report Designer/Data Source page allows you to:

- Search for, view, and select data sources for your report.
- Set up and validates relationships between your data sources.

	🖩 Reports 🕂 🖳 Dashbo	ards	+		
«	Distinct			Export - Updat	e Result Sar
Data Source	Search		Example Report Name 🖉	Preview Records 10	
🗹 Design			0		
ि Format	BILLING		₩ Filter		
Exporting	BILL_LEAS_SUMM		Please select a data source from the middle panel to begin creating your report		
F. Access	CATEGORY_TREND_C >				
	COMP_MAIN		All v Search Q		
	DASHPAGE	0	Join Alias Join Type Operator Data Object Join Field	Foreign Data Object	Field
	DEPT_MAIN  DEPT_MAIN_2		No record found.		
	FFX_VIEW_BILLSUM				
	FFX_VIEW_UNIT_VOC2  FFX_VIEW_VOC2				
	FFX_VIEW_VOC2_DISP1	0			
	FFX_VIEW_VOC2_DISP2  FFX_VIEW_VOC2_JOB				
Copyright 2020 AssetWorks, LLC					

- Available tables and views display in the middle panel next to the left side menu.
- You can use the search box to quickly filter results.



- To select a data source, select the green checkbox.
  - Existing relationships between selected data sources are automatically added to the relationship list in the Content Panel.
- To unselect a data source, clear the green checkbox.
  - Relationships between unselected data sources are automatically removed from the relationship list in the Content Panel.

	■ Reports	+
«	Distinct	
Data Source	unit_no Q	Example Report Name 🖉
🗹 Design	🗊 AVAILABILITY 🔹 🗹	Q
Format	I <u>UNIT_NO</u> ∎ BILLING ▼ ☞	▼ Filter
Exporting	I UNIT_NO	
🕶 Access	BILL_LEAS_SUMM	
	I <mark>UNIT_NO</mark> ■ BILL_NLEA_SUMM	All V Search Q
	I UNIT_NO	Join Alias Join Type Operator Data Object Join Field
	FFX_VIEW_UNIT_VOC2	No record found.
	⊥ <mark>UNIT_NO</mark>	
	FFX_VIEW_VOC2 •	
	⊥ <mark>UNIT_NO</mark>	
	FFX_VIEW_VOC2_JOB	

• You can choose to set the report as **Distinct** by selecting the checkbox on top of the middle panel. If selected, this will force the report to return unique values only.

<ul> <li>If you want the report to return duplicate</li> </ul>	e values, leave it clear.
--	---------------------------

	🖩 Reports 🕂 🖳 Dash	boards	+
«	Distinct		
Data Source	unit_no	Q	Example Report Name 🖉
🗹 Design		• 🗹	Q
ه Format	⊥ <mark>UNIT_NO</mark> ∎ BILLING	• 🕑	✓ Filter
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F. Access	BILL_LEAS_SUMM	• 0	
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	I UNIT_NO		Join Alias Join Type Operator Data Object Join Field
	FFX_VIEW_UNIT_VOC2	• 🗆	No record found.
	⊥ <mark>UNIT_NO</mark>		
	FFX_VIEW_VOC2	• □	
	J FFX_VIEW_VOC2_JOB	• 0	
Copyright 2016 - 2020 Izenda, Inc.			

• Select the amount of preview records from the dropdown at the top of the screen.

			Export - Upd	late Result Save (	Cancel Report Viewer
Example Report Name 🖉			Preview Records	10	- <
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✓ Filter				1000 10000 All	roperties
All 👻 Search		000		Add Relationship	Validate Syntax
Join Alias Join Type (	Operator Data Object	Join Field	Foreign Data Object	Field	Action
No record found.					

• To save the report, select the **Save** button at the top of the screen.

If the report has more than one table or views, you will have to first edit and define the relationships to join them together. See the following page for information on join relationships for reports with more than one table or view.

						Export +		Save	Cancel	Report Vi	ewer
Example Report Name 🖉				Save				×		•	<
Q				Template Name	Report 01						Filter Pro
✓ Filter				Save As	Templates			*			pertie
				Category	Select			-			ŵ
				Sub-category	Select			•			
All 👻 Search							ОК	Cancel	Validat		
Join Alias	Join Type	Operator	Data Object	Join Field	_	Foreign Data Obj	ect Field		Ac	tion	
Join Alias	Join Type	Operator	Data Object	Join Field		Foreign Data Obj	ect Field		Ac	tion	
Join Alias	Join Type	Operator	Data Object	Join Field		Foreign Data Obj	ect Field		Ac	tion	

- Give the report a unique name. The report is saved as a **Template** initially. After you define any field on the **Design Page**, the **Report** option is then available.
- Select a Category and Sub-Category if necessary. You can also create new categories and sub-categories on the fly by entering new values in the fields.

The report name must be unique. You cannot save the report with a duplicate name.

						Export - Update	e Result Save	Cancel Report Vie	ewer
Example Report Name 🖉	>					Preview Records 10		•	<
Q									Filter
<b>∨</b> Filter									Proper
									ties
				0 0 0				White one	
All   Search		Q					Add Relationship	Validate Syntax	
Join Alias	Join Type	Operator	Data Object	Join Field		Foreign Data Object	Field	Action	
	Inner 👻		•	<b>•</b>	= (Field) -	-	•	+ 🗆 ×	
	Inner		-	-	= (Field) -	-	•	+ 🗆 x	
	Left								
	Cross								
	Full								

### **Multiple Data Sources**

- When selecting multiple data sources, you must define their relationships to join them together.
- The options are:
  - Inner (Direct) Join: Selects rows from two tables such that the value in one column of the first table also appears in a column of the second table.
  - Left (First Exists) Join: The Left Outer Join known also as Left Join returns all rows from the left table in the Left Outer Join clause, no matter if the joined columns match. A field in a result row will be null if the corresponding input table did not contain a matching row.
  - **Right Join:** The Right Outer Join known also as Right Join returns all rows from the right table in the Right Outer Join clause, no matter if the joined columns match. A field in a result row will be null if the corresponding input table did not contain a matching row.
  - **Cross Join:** A cross join will return a result table where each row from the first table is combined with each row from the second table.
  - **Full Join:** The Full Outer Join known also as Full Join returns all rows from Both the Right Outer Join & Left Outer Join. A field in a result row will be null if the corresponding input table did not contain a matching row.
  - You can use the **Validate Syntax** button to make sure you have constructed a valid SQL statement before proceeding with the report.

						Export - Updat	e Result Save	Cancel Report Vie
Example Report Name 🖉	>					Preview Records 10	)	<b>~</b>
Ŷ								
✓ Filter								
All   Search		Q					Add Relationship	Validate Syntax
Join Alias	Join Type	Operator	Data Object	Join Field		Foreign Data Object	Field	Action
I VIEW_ALL_UNITS	Inner 👻		VIEW_ALL_U v	UNITID -	= (Field) -	VIEW_ALL_UNI 👻	UnitID	- + 🗉 ×

- Action buttons:
  - The + icon is for adding **Key Joins**.
  - The **Copy** icon allows you to copy a relationship.
  - The **X** icon allows you to delete a relationship.
  - More information about the Report Designer/Data Sources can be found <u>here</u>.

## 2. Design

The Report Designer/Design page allows you to:

- View field properties.
- Add or edit calculated fields.
- Add or edit report parts.
- Add or edit data source fields.
- Define report filters.

### **View Data Source Fields**

≡	+ Add Calculated Field		Export - Update Result Add Rep	ort Part Save - Cancel Report Viewer
=	unit Q	REPORT 01A	Preview Records 10 -	FIELD PROPERTIES
R	🖨 Selected Data Source	✓ Filter □ Show Filters Under Report Description Cross Filtering ©	a Add Filter	
_	🗊 Alias 1 🔹			Type View
lā.	I AlternateUnitNumber			Name Alias 1
Œ	DateUnitRequested			Field Name AlternateUnitNumber
5	# Replaces <mark>Unit</mark> ID	Filter Logic Example (1 OR 2) AND (3 OR 4)	Validate Syntax	Data Type Text 💡
	I Replaces <mark>Unit</mark> Number			operti
	# UNITID	• • • • • • • • • • • • • • • • • • •		
	I <b>Unit</b> Number			Repor
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	I UnitWONotes	TO CREATE A REPORT PART B Form		ties
	D VIEW_ALL_ <b>UNIT_</b> HI •	SELECT A TYPE: //i Gauge		
	# <b>Unit</b> ID	III Grid		
Сору	right 2016 - 2020 Izenda, Inc.			

- Data sources display in the middle panel under **Selected Data Source** group.
- To expand a source's fields, select it. The fields display icons representing their data type.
- You can also search for fields in the **Search** box at the top of the panel.
- Selecting a field displays the Field Properties panel on the right side of the screen.

### **Add Report Filters**

Please press Update Result button after adjusting filter configurations to avoid data inconsistency. 😵	Please press Update Result button after adjusting filter configurations to avoid data inconsistency. S Export 👻 Update Result Add Report Part Save 💌 Cancel Report Viewer									
REPORT 01A	Preview Records 10	-								
V Filter      Show Filters Under Report Description     Cross Filtering      Alias 1		Add Filter Properties								
AccessoryCost File AcquisitionDate AcquisitionPrep_Cost AcquisitionPrep_CostManual AcquisitionPrep_CostManual AcquisitionSecondaryMeter AcquisitionMeter1		Validate Syntax Roport Pa								
Leil Chart TO CREATE A REPORT PART È Form SELECT A TYPE: ♂ Gauge ■ Grid		T Properties								

- Select the Add Filter button.
- Select a field from the **Filter** dropdown menu.
  - Selected filters can be dragged and dropped in the *Filter* section to arrange them as needed.

Please press Update Result button after adjusting filter configurations to avoid data in	consistency. 🔇		Export - Upda	nte Result 🛛 Add Rep	ort Part Save	Cancel Rep	ort Viewer
REPORT 01A	Preview Records	10	-	FILTER PROPE	RTIES L	.ess ゝ	
✓ Filter Show Filters Under Report Description Cross Filtering ✿				Add Filter	[1] InServiceD	ate	▼ Filte
					- Source		er Prop
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Filter Logic Example (1 OR 2) AND (3 OR 4)				Validate Syntax	Filter Name	InServiceDate	▼ Bld Pro
✓ Report Body	V Denest Body - Saus to Orid						
					Date & Time		•
					Equals (Date 8	& Time)	• leport
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	🔟 Chart					js	operti
TO CREATE A REPORT PART	E Form				Filter Alias	InServiceDate	
SELECI A HYPE:	∽Gauge ⊞Grid				Visible		
			_		Required		

- You can configure the **Filter Properties** in the panel on the right side of the screen by selecting the < icon and selecting the **Filter Properties** tab.
- You can define the Source, Operator, Settings, and Formatting.
- In the **Settings** section you can define the alias, visibility, and requirement settings for the filter.

### **Building Complex Filter Logic**

In cases where a simple match-all condition is not enough, you can construct complex filter logic if necessary.

For example, you may have three filters:

- 1. MCC
- 2. Billing Code
- 3. Maintenance Location

And you want to return all units with an MCC of 01, a Billing Code of 12, and a Maintenance Location of FM.

You can enter those values and you will get all units that match the 01, 12, AND FM values.

But what if you want to view all units that have an MCC of 01 AND a Billing Code of 12 OR a Maintenance Location of FM?

You can use the complex filter logic to accomplish this task.

REPORT 01A 🖉	Preview Records
✓ Filter Show Filters Under Report Description Cross Filtering ♥	
1 MCC • X 2 BillingCode • X 3 MaintenanceLocation	<b>~</b> ×
Filter Logic 1 AND (2 or 3)	

• In the **Filter Logic** field, enter 1 AND (2 or 3). This will display results that match both the value in filter 1 AND that match either value in filters 2 or 3.

### **Apply Cross Filtering**

Select the **Cross Filtering** button to apply cross filtering. This allows you to drill up and down in multiple report parts. For each action, the report filters related parts automatically.

This functionality is only available on charts or gauges that have more than one x-axis field defined or when you have multiple report parts.

### **Manage Report Parts**

	Export •	Update Result Add Rej	port Part Save - Cancel F	Report Viewer
REPORT 01A	Preview Records 10	•	FIELD PROPERTIES	>
✓ Filter      Show Filters Under Report Description     Cross Filtering      Cross Filtering		Add Filter	✓ Data Source	Filter
1 MCC • × 2 BillingCode • × 3 MaintenanceLocation	¥ X		Type View	Prope
			Name Alias 1	erties
			Field Name UNITID	7
Filter Logic 1 AND (2 or 3)		Validate Syntax	Data Type Numeric	ald Pro
✓ Report Body Snap to Grid				perties
LM Chart TO CREATE A REPORT PART ☐ Form SELECT A TYPE: ⊄r Gauge III Grid				Report Part Properties

- Built-in report parts include:
  - Chart
  - Form
  - Gauge
  - Grid
- You can add a new report part by selecting the type you want or selecting the + icon anywhere else in the report grid section.
- You can copy, delete and resize report parts using the report grid.

A more in-depth review of each report part is available through <u>Izenda's user documentation</u>.

### **Field Properties**

REPORT 01A		Preview Records	10	•		
← Filter 📋 Show Filter	s Under Report Description	Cross Filtering 🌣				Add Filter
1 MCC	✓ × 21	Field Selection		×		
-		Alias 1				
Filter Logic 1 AND (2	or 3)	AccessoryCost AccessoryCostManual				Validate Syntax
✓ Report Body	p to Grid	AcquisitionDate				
_	Configuration	<ul> <li>AcquisitionPrep_CostManual</li> <li>AcquisitionPrepCost</li> </ul>		rev	iew	
Description	Test	<ul> <li>AcquisitionSecondaryMeter</li> <li>AcquistionMeter1</li> </ul>		_		
Columns	BillingCode × Mainte	Act_Code_Description			Moo	Materi
	Meter1Type × Meter	Active/DisposalStatus			MCC	Meterilype
Separators				OK Cancel	102	M
	Dra				T02	М
			1000	1/0	T00	

After a report part has been added to the grid (report body), you can edit your data source fields.

- Select a data source field inside the report body or you can expand the right-side panel and select the **Field Properties** tab and select *Grid* from the dropdown.
- A list of available fields displays in the dropdown next to it. The available fields display based on the values entered in the *Columns* box in the *Configuration* panel.

					Export -	Update Result Add Re	port Part Save -	Cancel Repo	rt Viewer
REPORT 01A				Preview Records	10	•	FIELD PROPERTIE	6 <u>L</u> e	<u>ss</u> >
✓ Filter	leport Description Cross Filtering 🌣					Add Filter	Grid		Filte
1 MCC	× 2 BillingCode		3 MaintenanceLocation	- ×			▼ Data Source	BillingCode	r Prop
		▼ Data Formatting	MaintenanceLoc	arties					
							▼ Header Formatti	MCC	Ţ
Filter Logic 1 AND (2 or 3)						Validate Syntax	▼ Drill Down	Meter1Type	Id Pro
► Report Body		OwnerDepartme	pertie :						
• Report body _ Shap to Sha									s
	Configuration	2	e	Previ	ew				Repo
Description		•	0-14						ort Part
Columns Billing	gCode X MaintenanceLoca X MCC X		Test						orope
Meter	r1Type 🗙 Meter2Type 🗙 OwnerDepartment 🗙	+	BillingCode	MaintenanceLocat	MCC	Meter1Type			rties
Separators		Ø ]	AP99	CLKS	T02	М			
	Drag or Add a field	+	AP99	CLKS	T02	м			
			+ 500	01.1/0	<b>T</b> 00				

- There are four sections in this panel
  - 1. Data Source
  - 2. Data Formatting
  - 3. Header Formatting
  - 4. Drill Down

#### **Data Source**

					Export •	Update Result	Add Rep	ort Part Save	Cancel	Report Vie	ewer
REPORT UTA				Preview Records	10		-	FIELD PROPERT	ES	Less	>
✓ Filter 📄 Show Filters	s Under Report Description Cross Filtering 🌣					â Ad	dd Filter	Grid	▼ BillingCode	•	Filter
								▼ Data Source			· Prop
								Туре			erties
								Name	Alias 1		7
Filter Logic Example (1 OR 2) AND (3 OR 4)						Validate Syntax Field Name BillingCode					eld Pro
✓ Report Body      ■ Snap to Grid			0					Field Name Alias	BillingCode		perties
	Configuration	Ð	4	Data Typ		Data Type	Text		70		
Tale		_					-	Visible	~		eport
Description	Grid	•	Grid					Data Formattir	g		Part Pr
Description	Grid 1	\$	Grid 1 BillingCode					• Header Forma	ting		operti
Columns	BillingCode ×	+	AP99					Drill Down			es
		10	AP99								
Separators	Drag or Add a field	+	1000								

- In this section you can edit two fields:
  - 1. Field Name Alias
  - 2. Visibility check box

#### **Data Formatting**

					Export •	Update Result	Add Rep	oort Part Save	Cancel	Report V	/iev
REPORT 01A				Preview Records	10		-	FIELD PROPERT	TIES	Less	
✓ Filter 📄 Show Filters U	Jnder Report Description Cross Filtering 🌣					a Ad	dd Filter	Grid	▼ Count (Billin	ng 💌	]
								▼ Data Formatti	ng		L
								Function	Count	~	L
								Format	Count		ŀ
Filter Logic Example (1 0	DR 2) AND (3 OR 4)					Validate	Syntax	Width	Count Distinct		L
M Report Party - Care t		0.0	0 0					Font	Group		L
• Report Body Shap t	o Gria								Maximum		L
	Configuration	Ð	•	Previe	N				Minimum		l
Title	Grid	¢						Alignment		•	L
Description	0.14	Ξ.	Grid								L
Columna		_ *	Count (BillingCode)					Word Wrap	<b>2</b> 2		Ľ
Columns	Count (BillingCode)	+	416086					Sort	41		L
		18	410500					Color	A 🔶		L
Separators	Drag or Add a field	+						Alternative Text	¢		

- In this section you can:
  - Apply a function to the field.
  - Format the display.
  - Choose font size, text effects, text color.
  - Set alignment.
  - Sort (sorting).
  - Subtotal and grand total settings.

#### Functions:

Name	Description			
	No function used.			
Average Averages the values in a column.				
Count	Counts the number of values in a column.			
Count Distinct Counts the number of distinct values in a column.				
Maximum Takes Maximum value of a field.				
Minimum Takes Minimum value of a field.				
Sum	Sums the values in a column.			
Sum Distinct         Sums the rows with distinct values in a column.				
Group	Groups field values together for aggregating.			
Group (Day)	23; day of month .			
Group (Month)	3; instead of March.			
Group (Year)	2019			
Group (Month Name)	July			
Group (Date)	7/4/2019			
Group (Day of Week)	Sun or Mon			
Group (Year & Month)	2019 -07			
Group (Year & MN)	2019 - Jul			

Name	Description
Group (Week)	Jul 01 – Jul 07 (Sunday to Saturday of Week).
Group (Year & Quarter)	2019–Q3
Days Old	342 (Number of Days from Today's Date).
Sum (Days Old)	782 (Sums the Number of Days from Todays Date).

#### **Numeric Formats**

Name	Description
	Displays the number as it is stored in the database.
0,000	Displays as a whole number.
0,000.00	Displays with two decimal places.
\$0.00	Displays as currency with two decimal place.
\$/100	Displays the Number / 100 In currency format.
0.0	Displays with one decimal place.
0.00	Displays with two decimal places.
0.000	Displays with three decimal places.
0%	Displays the number as a percentage.
% of Group (with rounding)	Same as % of Group but rounds to closest tenth (ex. 1.11547% would be 1.1%).
% of Group	Calculates the percentage of the row value to the entire group of values.
Gauge	Shows value in a Linear Gauge instead of a numerical value.
Gauge (variable)	Shows values in a Linear Gauge which changes format due to values.
Dash Gauge	Shows values in a Linear Gauge which changes format due to values.

#### **Date/Time Formats**

Name	Description
	Displays the date as it exists in the database.
Short Date	Displays date using the mm/dd/yyyy format.
Long Date	Displays the day of the week, month, numeric day, and the year.
Short Time	Displays time as hh:mm AM/PM.
Long Time	Displays time as hh:mm:ss AM/PM.
Full (short)	Displays the Long Date format, followed by the Short Time format.
Full (long)	Displays the Long Date format, followed by the Long Time format.
D&T (short)	Displays the Short Date format, followed by the Short Time format.
D&T (long)	Displays the Short Date format, followed by the Long Time format.

#### **Header Formatting**

					Export - Up	odate Result 📃 Add Rep	ort Part Save	Cancel Report	Viewer
REPORT 01A				Preview Rec	ords 10	•	FIELD PROPERT	TES Les	<u>s</u> >
✓ Filter	s Under Report Description Cross Filtering 🌣					Add Filter	Grid	▼ ChangeDate ▼	- Fite
	Data Formatting								
								atting	2
Filter Logic Example (	Filter Logic Example (1 OR 2) AND (3 OR 4) Validate Syntax								
M Depart Pady Con	***								pertie
• Report Body _ Shap	p to Ghd						Alignment	****	ö
Grid				N	umber of Records	23 9 ×			Repo
Title	Grid	\$					Color	A •	nt Part
Description	Grid 1	۵	Grid Grid 1				Word Wrap	<b></b> ,	Prop
Columns	BillingCode × BookValue × ChangeDate ×		BillingCode	BookValue	ChangeDate		Column Group		rties
		+	AP99	0	2019-09-09T12:31:		Column Group		
Separators			AP99	0	2019-09-09T12:31:		<ul> <li>Drill Down</li> </ul>		
	Drag or Add a field	+	*000	•	0010 00 00710 01				

• You can format header settings, such as font, font size, alignment, color, word wrap, and column group.

#### Drill Down

leports 🕂 🖳 Dashboards 🕂					🌲   💿
	Subreport Settings		Update Result Add Rep	oort Part Save - Cancel Report Viewer	
REPORT 01A	Reports		۹ <b>×</b>	•	FIELD PROPERTIES
✓ Filter	Subreport's filters inhere	erit filters from current report		Add Filter	Grid   ChangeDate
	Field in Current Report	Field in Subreport			Data Source
	No record found.		- 1		Data Formatting
					Header Formatting
Filter Logic Example (1 OR 2) AND (3 OR 4)				Validate Syntax	✓ Drill Down
M Denest Redu - Course Cold					Sub Report 🍄
• • Report body Shap to Grid					
Grid			_	M S ×	
Title Grid	Style Link (New Window)		•		
Description Grid 1	You would like to view this setting as:				
Columns BillingCode × BookValue × ChangeD	●Link Olcon 🗞 👻		te	2	
				31:	
Separators		Add Field Mapping OK Ca	ancel	31:	
Drag or Add a field				*	

• The *Drill Down* section allows you to configure sub reports.

More information on the Report Designer/Designer section can be found here.

## 3. Format

	Report Formatting -		Export - Update Result Save -	Cancel Report V	Viewer
=	Report Header & Footer - Image	REPORT 01A	Preview Records 10	•	<
•	Text Date Time Page Number Horizontal Rule Vertical Rule	Filter      Show Filters Under Report Description     Cross Filtering		Add Filter	Filter Properties
5	Report little & Description	Filter Logio Example (1 OR 2) AND (3 OR 4)		Validate Syntax	Field Prope
		✓ Report Header		Add Item	rties
		× Logo Image	Report Name	×	Report Part Prope
			Report Generated X Current Date Time	×	rties
			User X Current User Name	×	Forma
			Tenant × Tenant Name	×	t Prope
Сору	ight 2016 - 2020 Izenda, Inc.				

The <u>Report Designer/Format</u> page allows you to:

- Format the layout for the report's header and footer.
- Enter a title and description.
- Enter additional report items:
  - Image (URL-based only)
  - Text
  - Date/Time
  - Page Number
  - Horizontal Rule
  - Vertical Rule

## 4. Exporting

The Exporting page allows you to view a generated preview of the report as well as export the query execution SQL to a .txt file.

## 5. Access

				Export -	Save 👻	Cancel	Report	Viewer		
REPORT 01A		Owner	Thomas Belskie ×							
All • Search Q						Add S	Sharing	8		
□ Share With					<ul> <li>Acces</li> </ul>	s Rights	A	Action		
User -	test90 TEST90 ×				• Viev	v Only	*	×		
Role *	RJTEST × RALL2 ×				Full	Access	*	×		
1 to 2 of 2   Items per page 10 ▼ H < 1 /1> H										

The Report Designer/Access page allows you to:

- View and edit report owner.
- View list of sharing's.
- View, edit, or remove who the report is shared with.
- To add a sharing, select the **Add Sharing** button, select **Everyone**, **User**, **or Role**, select the appropriate entities to share with, then set **Access Rights**.
- You can delete/revoke access by selecting the X icon.

## 6. Report Viewer

I Rep	ports 🕂	띷 Dashboards	+											
				Add Subscription				×	Subscribe	Print		Export 🕶	Edit 🕶	
REPORT 01A														
✓ Filters				Instance Name										
				Schedule Delivery										
				Subscription Type	Subscribed Report	ting Item		-						
				Time Zone	(UTC-12:00) Intern	national Date Line West		-						
				Start Date	03/06/2020 🖀	Start Time		0						
All 👻 Search				Recurrence	Every Day			-						
Instance Name			✔ Sch						on	Delivery T	уре	Del	ivery Metho	d
No record found.														
							ОК	Cancel						
					_	_	_							
Copyright 2020 AssetWorks, LLC														

The <u>Report Viewer</u> option allows you to:

- View report output.
- Schedule the report by using the **Subscription** functionality.
- Export to a variety of file formats.
- Print the report.
- Hide header and footer.
- Email a report.

## 7. Grid – Report Part

					Exp	oort 🕶 🛛 Updat	e Result Save	Cancel	Report Vi	iewer
REPORT 01A 🖉	REPORT 01A				10	•	REPORT PART	PROPERTIES	Less	>
✓ Report Body	Snap to Grid						Grid		-	Filte
										r Prop
Grid Grid 1							Grid Style	Vertical	•	erties
BillingCo	de BookValue	ChangeDate					Separator Style	Comma	•	
AP99	0	2019-09-09T12:31:								
AP99	0	2019-09-09T12:31:					Border	¢		opertie
AP99	0	2019-09-09T12:31:					Background	٥		- ö
AP99	0	2019-09-09T12:31:					Color			Repo
AP99	0	2019-09-09T12:31:					Alternative Background	None	Ψ	rt Par
AP99	0	2019-09-09T12:31:					- Columns			t Prop
AP99	0	2019-09-09T12:31:					Width	150	Pixel	erties
AP99	0	2019-09-09T12:31:					Alignment	2 ± 5	=	
AP99	0	2019-09-09T12:31:						= = =		
AP99	0	2019-09-09T12:31:					Word Wrap	2		

The <u>Report Designer/Grid</u> page is a report type available for use on the report grid or report body section. It supports four different styles: vertical, horizontal, pivot, and drill-down.

## 8. Chart – Report Part

		Export - Update	e Result Save	Cancel Report V	/iewer	
REPORT 01A	Preview Records 10	•	REPORT PART	PROPERTIES Less	>	
✓ Report Body □ Snap to Grid			Chart	Ŧ	Filter	
Lau Chart 🖉	Number of Records	o₩₽×		✓ General Info		
Chart 1			Chart Type	Pie 🔻	rties	
			✓ Chart		Fe	
			Border	٥	d Prop	
			Background Color	٥	oerties	
			Color Theme	No Theme (defa	Report Pa	
			Multi-Color 🕕		art Pro	
			▼ Labels		perties	
			Data Labels	<u>ab</u>	0	
			Hover Labels	•		
			✓ Legends			

The <u>Report Designer/Chart</u> page is a report type available for use on the report grid or report body section. It displays data using graphical symbols, options include pie charts, line charts, and bar charts.

## 9. Form – Report Part

	Export - Update Result Save - Cancel Report Viewer
REPORT 01A	Preview Records 10
✓ Filter      ☐ Show Filters Under Report Description     Cross Filtering	Add Filter
	> Form
	> Edit
	> Tool
Filter Logic Example (1 OR 2) AND (3 OR 4)	Validate Syntax +HTML
	Wrap Text 🖉
Keport Body Snap to Grid	Highlight Code 🖉
Form	Reformat 🖄
Visual HTML	> View
1 <div></div>	Prop
	rties

The <u>Report Designer/Form</u> page is a report type available for use on the report grid/report body section.

## 10. Gauge – Report Part

					Export -	Updat	te Result Sa	ve 🕶 Cancel	Report Vi	iewer
REPORT 01A			Preview Records	10		-	FIELD PROP	ERTIES	Less	>
✓ Report Body □ Snap to Grid							Gauge	✓ Count (	Arriva 🔻	Filter
Configuration	Ð	G	Preview					ce		Prope
Title							Туре			rties
Gauge	٥	Gauge					Name	Alias 1		Fie
Description	A	Guage 1					Field Name	ArrivalDate		Id Pro
Labels (X-axis)	~	0	0.03				Field Name A	lias Count (Arriv	alDate)	pertie
DepreciationCost ×							Data Type	Datetime		
							Visible			Report
Values (Y-axis)		278275						atting		Part P
V Metric 1		0 5/65/5	878875 0	155	378375		Function	Count	•	ropert
Value Count (ArrivalDate) × +							Format		•	0S
Scale From To							Sort	1t		
		1.0.00		м			Color	Α		
Unit Label		I to 2 of 2   Items per page 5	▼ N < 1 /1>	м						

The <u>Report Designer/Gauge</u> page is a report type available for use on the report grid or report body section. This type of report displays data using a speedometer-like graphic.

## **Dashboard Designer**

Dashboards are collections of report parts. You can pull one or more parts of one or more lzenda reports into a dashboard and arrange them in a custom manner.

The Dashboard Designer page allows you to:

- Use preset layouts or customize layout.
- Add report parts.
- Edit description and background.
- Copy and move dashboards.
- Use presentation mode.
- Configure sharing access.
- Manage subscriptions and schedules.
- Print, e-mail dashboards.
- Manage filters.

	Reports +      Dashboards +
«	All V Search Q
ALL DASHBOARDS	LOCAL CATEGORIES
Local Categories 👻	DASHBOARD
Dashboard 🥜	Dashboard Demo 1
PETE CAT 🕨 💉	PETE CAT - PETE SUBCAT
Uncategorized	Pete's Dashboard
	UNCATEGORIZED
	Trang
Convicient 2016 - 2020 Izanda Jac	

- To create a new dashboard select the + icon.
- You can select a blank layout or one of the preset options from the popup.

RESYNC ROLES	-	
	Dashboard Preset Layout	×
🗏 Reports 🕂 🖳 Dashboards 🕂		
	Select the preset layout that you want to use for your dashboard.	Edit - Print Email Update Results Add Dashboard Tile
Example Dashboard Name 🖉		
✓ Filters		
Copyright 2020 AssetWorks, LLC		

- You can also rename the dashboard by selecting the **pencil** icon next to the dashboard name.
- You can add additional tiles by selecting the **Add Dashboard Tile** button to the left of the **Save** button.
- Each dashboard tile has two options for type:
  - 1. Report Part
  - 2. Text

		Þ	Access	Subscribe	Edit +	Print	Email	Update Results	Add Dashboard Tile	Save	Cancel	Close
Dashboard01 🖉												
✓ Filters												Freeze
Title	Text Tile Example											•
Description	This is an example of what you can do with a text tile											٥
Body Text	Roboto			- 14							Ť	
Convicte 2016 2020 lavada la												

					Access	Subscribe	Edit +	Print	Email	Update Results	Add Dashboar
											-
Report Part Selection	on										×
Search Criteria											
Save Into	Local Categories	-									
Category	TEST REP 987	-	Sub Category	All			-				
Report Name											
Created By			Created Date	From			<b>#</b>	То			
Last Edited By			Last Edited Date	From				То			<b>#</b>
										Search Res	et
	_		_	_	_	_	-	-	-	_	

- To add a report part, select the **Report Part** option in the tile.
- The **Report Part Selection** pop-up displays, you can search through available parts here. Enter criteria and select **Search**.
- A list of available reports displays.

	Report Part Selection							×
■ Reports + P Dashboards +	Search Result Select a report, then select the report part you would like to display on your dashboard tile							
	Report Name	<ul> <li>Save Into</li> </ul>	Category	Sub Category	Created By	Created Date	Last Edited By	Last Edited Date
	ester mac report	Local Categories	TEST REP 987	TEST SUB 987	Mac Breuer	09/17/2019	Mac Breuer	09/17/2019
	sgh - test 2	Local Categories	Sharon		Sharon Henry	10/16/2019	Sharon Henry	10/16/2019
	Units View Demo	Local Categories			Thomas Belskie	12/23/2019	Thomas Belskie	02/28/2020
	Units Active	Local Categories			Percy Rucker	01/08/2020	Percy Rucker	01/08/2020
	Sharon Test 1	Local Categories	Sharon		Sharon Henry	10/09/2019	Thomas Belskie	12/23/2019
	SHARON TEST 1	Local Categories			Sharon Henry	02/26/2020	Sharon Henry	02/26/2020
	REPORT 01A	Local Categories			Thomas Belskie	01/17/2020	Thomas Belskie	01/17/2020
	Paul Chart1	Local Categories			Paul Kinkel	02/24/2020	Paul Kinkel	02/24/2020
	_ РК1	Local Categories			Paul Kinkel	01/22/2020	Paul Kinkel	01/22/2020
	PK WO BASIC	Local Categories			Paul Kinkel	02/21/2020	Paul Kinkel	02/26/2020
	1 to 10 of 17   Items per page 10 🔻	< <u>1</u> /2▶ M						
	Report Part Title			✓ Report	t Part Type			
	Grid			IIII Gri	d			
	Gauge			(7) Ga	uge			
	Chart			Lad Ch	art			

- Select the radio button next to the report from which you want to add a report part.
- A list of available report parts displays below the report list.
- Select the radio button next to the report part you want to add.

You can only add one report part per tile. If you want to add multiple parts from the same report, you will have to add a tile to the dashboard for each one.

• Select **Ok** to add the part to your dashboard.

### **Edit Dashboard**

	D Access Subscribe	Edit • Print Email Upda Results Add Dashboard Tile Save • Cancel Close
		Dashboard Description Set Background Color
Gauge Guage 1		Set Background Image Copy
0	0.03	Move Show filter descriptions on tile
0 <b>378962</b> 578962	0 153 578962	0 88 578952
0.25 	0.33	
Copyright 2016 - 2020 Izenda, Inc.		

The Edit dashboard menu allows you to:

- Edit the description.
- Set a background color and image.
- Copy or move the dashboard.
- Show or hide filter descriptions.

### **Presentation Mode**

Dashboard01 🖉		
✓ Filters		
Grid Grid 1		
BillingCode	BookValue	ChangeDate
AP99	0	2019-09-09T12:31:
1		
AP99	0	2019-09-09T12:31:
AP99 AP99	0	2019-09-09T12:31: 2019-09-09T12:31:
AP99 AP99 AP99	0 0 0	2019-09-09T12:31: 2019-09-09T12:31: 2019-09-09T12:31:
AP99 AP99 AP99 AP99	0 0 0	2019-09-09T12:31: 2019-09-09T12:31: 2019-09-09T12:31: 2019-09-09T12:31:

- Select the play icon to enter Presentation Mode.
- This mode allows each dashboard tile to take a turn being displayed for a set amount of time.

/ashboard01 🖉			
	Ducategorized/REP.		
	Grid Grid 1		
	BillingCode	BookValue	ChangeDate
	AP99	0	2019-09-09T12:31:
Copyright 2016 - 2020 Izenda, Inc.			

- Use the < and > arrow buttons to switch between tiles or enter a time interval in the section highlighted in the above screen shot.
- Select the **Full Screen** button to start the presentation.

### **Configure Sharing/Access**

	Access Subscribe Edit - Print Email Update Results Add Dashboard Tile Save - Cancel Close
Dashboard01 🖉	Owner T ×
All v Search Q	Add Sharing
Share With  Veryone Role User	Access Rights Action
1 to 1 of 1   Rems per page 10 • K < 1 / / 1 × K	

- Select the Access button to open the Sharing screen.
- Select the Add Sharing button to add a new sharing setting for the dashboard.
- Select who to share with (Everyone, Role, User).
- Set Access Rights for the sharing.
- User the **X** button to delete or remove a sharing.
- Select **Save** when finished.

### Subscriptions/Scheduling

Dashboard01 // Ali v Search Q	Add Subscription × Instance Name Schedule 1				C Access Subscribe	Edit • Print Email Update Resul	te Add Dashboard Tife Saw + Cancel Close Add Subscription
Instance Name  Schedule	Schedule Delivery				on	Delivery Type	Delivery Method Action
No record found.	Subscription Type Time Zone Start Date Recurrence	Subscribed Report (UTC-12:00) Intern 01/17/2020 Every Day Every Weekday Every Weekday Every Weekday Every Week Every Week Every Month Every Quarter Custom Recurrence	ting Item hational Date Line West Start Time 09:38:01	v v v			

- Select the **Subscribe** button at the top of the screen to open the **Subscriptions** page.
- This functionality is like report subscription/scheduling functionality.
- Select the Add Subscription button to launch the Scheduling/Delivery pop-up.
- After entering **Schedule** and **Delivery** information, select **OK** to proceed add subscription.

### **Other Options**

- You can also **Print** dashboards by selecting the **Print** button.
- You can Email dashboard by selecting the Email button
- Select the **Update Results** button to refresh the dashboard and display the most current version/information.
- The **Cancel** button allows you to cancel any current editing action on the dashboard that has not yet been saved.
- Select **Close** to exit the Dashboard Designer and return to the Dashboard List.

Please consult Izenda's user documentation for more information on Dashboards.

## **M5** Application Frames

### **Role Maintenance**

Role Maintenance	
- Role Information	
Role: Description:	
General Locations/ Menus/ Privileges Reporting Application Dep Oper Entities KPI Users Cha	artments/ Vendor Indirect at Groups Gateway Accounts
Printer Groups	
Unauthorized Printer Groups Authorized Printer Groups	
▲ · · · · · · · · · · · · · · · · · · ·	
~	
 <<	
<b></b>	
Burnet Burnet	
Report Groups	
Unauthorized Report Groups	
~	
■ 100 100 100 100 100 100 100 100 100 10	· ·
Default Report Group;	

• You can configure **Ad Hoc Access Group** settings on the **Reporting** tab of the *Role Maintenance* frame. Groups are set up and configured using the *Ad Hoc Group Maintenance* frame. **Application User Maintenance** 

SAVE UNDO REFRESH DELETE	FIND MORE V RELATED V
Application User Maintenance	
Application User Information Application User: Allow Web Access: Password: Password Expire (days): User can change password:	Disabled: No T
Force password change next login:     Allow Mobile Access:     Password:	
Adhoc Access:	
User Role: User Based Dashboard: Idle Timeout Minutes: Crystal Enterprise User: Pooled:	

- Ad Hoc Access settings for individual users are set on the *Application User Maintenance* frame.
- **Options:** None, Run Reports, Create Reports, or Report Admin.

### Ad Hoc Group Maintenance



- The *Ad Hoc Group Maintenance* frame allows you to create and configure access settings for your ad hoc groups.
- This frame also defines which views the users can use for reporting.
- The data sources for the ad hoc reports are views of the M5 data and display on the **Objects** tab.
- These data views allow you to manipulate and customize the data for reporting purposes without modifying the actual data.

### Adhoc Query Admin

Adhoc Query Admin		
(Re)Syncronize Company (Tenant) information with Izenda Configuration DB.		
(Re)Syncronize M5 DB Connection/Data Sources with Izenda Configuration DB. This should be done anytime a new adhoc object has been added. Warning: ReSyncing data source could take several minutes.		
(Re)Syncronize all roles. Warning: ReSyncing all roles could take several minutes.		
(Re)Syncronize all Users. Warning: ReSyncing all users could take several minutes.		

- The Adhoc Query Admin screen helps facilitate synchronizing data between M5 and the Izenda configuration database.
  - Men Ad Hoc is initially installed or setup, an ad hoc admin user should go to the Adhoc Query Admin screen and select the buttons in the order they are on the frame (top to bottom). If the client is multi company, this will need to be done for each company.
- When a user navigates to the Ad Hoc Query frame, the tenant, data sources, roles (for that user only), and user information (for that user only) are synchronized if they haven't already been synchronized.
  - Because the Data Source synchronization can take several minutes, it is best for an Ad hoc Admin to synchronize from the Adhoc Query Admin screen before any users navigate to the Ad Hoc Query frame.
- Each button calls a custom webservice endpoint:
  - **Sync Tenant** - Creates or updates a tenant in the Izenda Database. The tenant is used for the same purpose as M5 uses company. The tenant name or id is equal to the M5 company code. This typically only needs to be done when Ad Hoc is initially installed/setup. Running it more than once won't hurt but is not necessary. There is an M5 Param called: M5 PARAM 'ADHOCBI TENANT ID'. The default value for this parameter is the company code.

- **Sync Data Sources** Creates or updates the connection string to the M5 database, the M5 database schema, the M5 views that can be used in a report.
  - This should be done when Ad Hoc is initially installed or set up. It should also be done anytime an M5 patch is installed (to ensure any changes to the M5 database schema are reflected in the Izenda database) or anytime a new object is added to the Ad Hoc Objects screen (so that object will be marked as usable on a report).
  - This can take several minutes. For best results, an admin should run it here on this frame rather than let the token webservice endpoint create the data source.
- Sync All Roles Creates or updates all roles in Izenda as defined on the M5 Adhoc Group Maintenance frame. Can be optionally run to create Roles in Izenda based on Ad Hoc Groups. Three Roles will be created in Izenda per Ad Hoc Group. One starting with A-, one starting with C-, one starting with R-.
  - For example, C-All. This should be run anytime Ad Hoc Objects are added to or removed from an Ad Hoc Group. The A-, C-, R- equate to the Ad Hoc access granted to a user on the Application User frame. It determines whether a user can create a report, or only view a report (A- = Report Admin, C- = Create Reports, R- = Run Reports).
  - ▲ If this is not run, the Roles that are assigned to a user will be synchronized the first time they navigate to the *Ad Hoc Query* frame. Is this why we see the gears running every time we enter this frame? The user can also re-synchronize their roles by selecting the 'ReSync Roles' button on that frame.
- Sync All Users Creates or updates all users in Izenda as defined on the M5 Application User Maintenance frame. The user's information will be synchronized when they visit the Ad Hoc Query frame. An Admin may want to run this button when there are users that have been disabled. Those users will not be able to log in because they are disabled, but another user may be able to see the disabled user in the Ad hoc UI when doing things such as sharing a report with another user.

## **Additional Resources**

- Calculated Field Expressions
- Grand Total and Subtotal
- Filter Operators
- Izenda Training Walkthroughs:
  - Creating Your First Report <u>Click Here</u>
  - Adding to Your Report <u>Click Here</u>
  - Styling Your Report <u>Click Here</u>
  - Creating Your First Dashboard <u>Click Here</u>

## Updates

Release	Section	Description
23.2	All sections	Applied miscellaneous writing style updates throughout the document.
24.0	Setup and Configuration	Updated the reference to the M5 Ad Hoc Izenda Install Guide.