Business Application Intelligence

Reports - Graphs & Alerts User Manual

New Click&DECiDE 2015

64-bit

Last Edition March 19th, 2015

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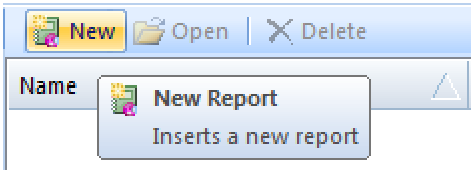
1. Using Reports

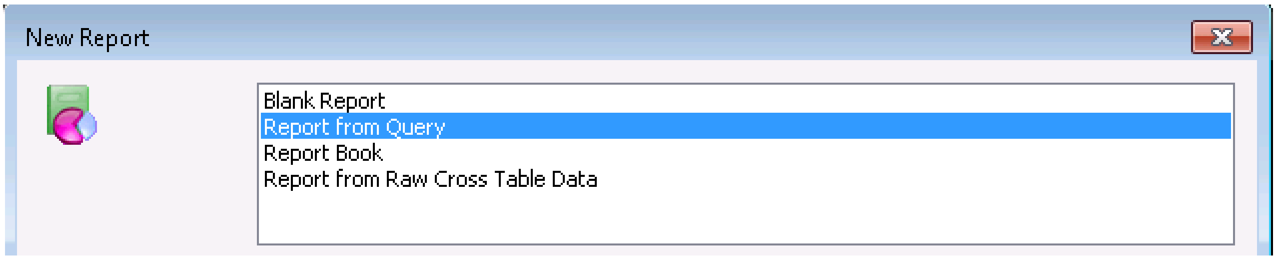
Note: you are supposed to read the manual about **Using Queries** and the manual about **Using Cubes** before to read this one.

1.1. Creating a new report from a Query

You can create a report directly from the current open query by clicking the command **Query> Create report** or the icon , or you can create a report from the Click&DECiDE Project Report Tab by clicking the “New” icon:



This command will ask you to choose among:



Blank Report: creates an empty report inside of which you will insert manually the required static (Labels) or dynamic fields (if a query is later specified or using formulas) or other objects. This option is reserved to advanced users.

Report from Query: this is the most used option that will create a report based on the query you will specify in the Data Source Item list box, using automatically all the query columns.

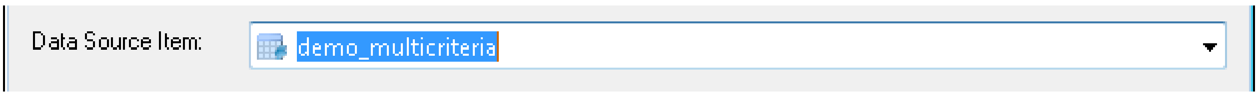
Report Book: creates a report list of existing reports to be able to export or print them together as one global report. A Report Book can be printed to printer, exported to HTML or PDF formats. A Report Book cannot be exported to other Click&DECiDE Builder output formats.

Report from Raw Cross Table Data: creates a report based on the cross-table you will specify in the Data Source Item list box by reading the cross-table rows as a data source.

Warning: Report from Raw Cube Data: this option does not exist anymore in version 2015 because Builder 64-bit cannot manage Microsoft Cubes, but a Report based on Raw Cube Data (as a data source) made with a 32-bit version of Builder (V13.x) can still be run through the Web Portal having Click&DECiDE 2015, but not in Builder 64-bit.

Steps:

1. Select the most used option **Report from Query**. (Other options are explained later)
2. Click then on the **Data Source Item** list box to get the list of the available queries and select the one you need. Example selecting the demo_multicriteria from the Click and DECiDE Demonstration.wfv file.



3. A default **Report Template** is proposed:

You can select a standard template in the list and see a preview on the right pane. You can enlarge any preview by double clicking on the picture. Once you get the picture bigger, you also can switch to full screen if you want to see more details.

Each template displays a comment about the Paper size, the Colour and Font, or information about the width and height size (fixed or modifiable).

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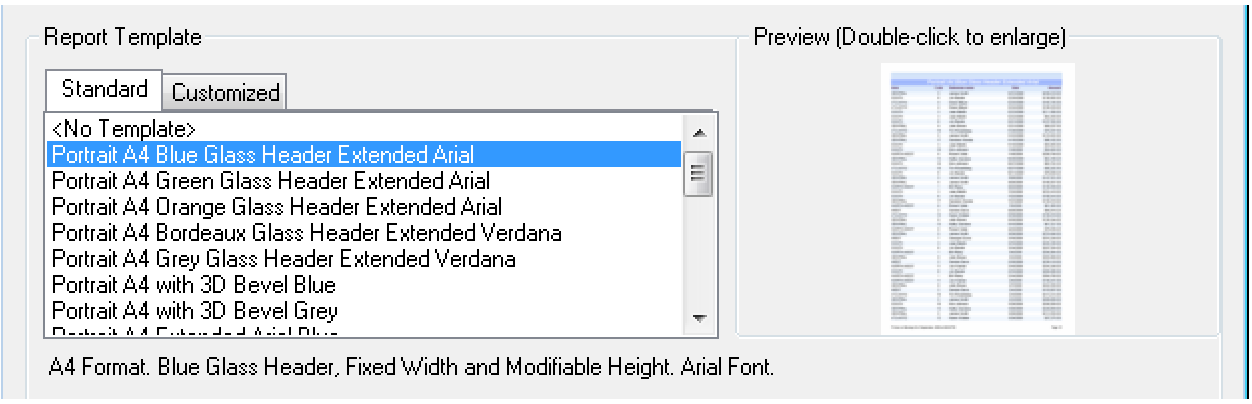
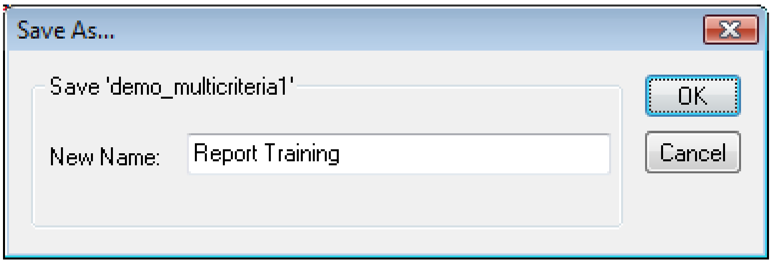


4. Select the one you like and click **OK**. See also later how to create your own report templates using the command **Tools> Report Templates** command.
5. Click **OK** to get automatically a new report with the following blocks or sections by default: Report Header, Page Header, Details, Page Footer, Report Footer.

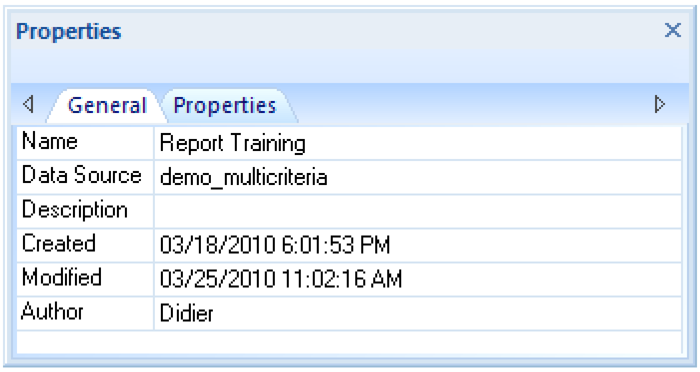
1.2. Saving a Report

Once your report has been created and modified, you can save the report using the icon or the command **File> Save** that will prompt you the **Save as…** dialog box proposing by default the query name on which the report is based.



Modify the name if required and click **OK**.

If you close the report, you can see in the Click&DECiDE Builder project report tab, the name of all the existing reports and, if the command **View> Details** from the Click&DECiDE Builder toolbar is activated, you also see some information such as **Data Source** (the name of the query on which the report is based), **Description** (empty by default) where you can add a comment about each report using the right mouse click and the **Properties** command or by clicking on the icon:



Also the **date of creation** and the **date of last modification** are displayed with the **View> Details** mode or in the Report Properties dialog box, as well as the Report Author that cannot be modified.

You can sort the information in the Click&DECiDE Builder Project Report Tab by any column just by clicking on the heading column text.

You also can change the position of each column from left to right or right to left moving a column to another location. To do that, click on a column and keep the mouse button pressed, then move the column to the right or to the left and drop the mouse button when the target location is reached.

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Name	Data Source	Modified	Description	Created
Customer labels using format AVERY L7160	Customer file	10/29/2009 12:15:31 PM	Sample of labels using the customer file	11/24/2000 2:47:19 PM
Dashboard with report - Report	Dashboard with report - Q...	11/27/2009 3:35:47 PM	Used by the EBIS Project "Ebis with Report.wfd"	03/01/2002 2:53:01 PM
Date Keyword Report	Date Keyword Query	01/29/2010 5:47:13 PM		12/16/2008 3:12:52 PM
Demo_Multicriteria	demo_multicriteria	11/16/2009 4:01:28 PM		05/20/2003 11:24:37 ...
demo_multicriteria_product	demo_multicriteria_product	03/25/2010 10:45:46 AM		03/23/2010 4:57:16 PM
Graph with series in rows	Graph with series in rows	10/29/2009 2:56:21 PM		11/17/2008 6:48:42 PM
Invoices	Invoices	11/03/2009 11:42:57 AM	Example printing invoices	10/08/1999 12:07:53 ...
Invoices Alert	Invoices Alert	11/19/2009 3:28:13 PM		06/23/2009 5:59:15 PM
Invoices e-mail	Invoices with alert parame...	03/11/2010 2:30:18 PM	Example printing invoices	10/08/1999 12:07:53 ...
Products by category	Products by category	10/29/2009 2:57:35 PM	Example with 2 columns	02/21/2001 6:50:49 PM
Report-Brochures		10/29/2009 2:08:03 PM	DataSet products brochure	02/19/2001 2:30:57 PM
Report Training	demo_multicriteria	03/25/2010 11:02:16 AM		03/18/2010 6:01:53 PM

1.3. Deleting a Report

To remove a report, you must first open the Click&DECiDE Builder project file inside of which your report is located. Then select the Report Tab, select the report to be removed and use the <Del> key or press the <Remove> button. A warning message asks you to confirm.

Be careful: that command could be dangerous because the lost report could be used by another report as a sub-report or be included in a Report Book. The Description box could be use to enter dependencies between several items. (Example a comment such as “This report is used as a sub-report in the report XXXX”).

Make sure this report is not used anymore before confirming the warning message. There is no way to restore a report that you have deleted except if you made previously a backup of your project file (recommended).

1.4. Reports Blocks

A new report is made of the following blocks or sections by default:

Report Header: printed one time at the beginning of the report

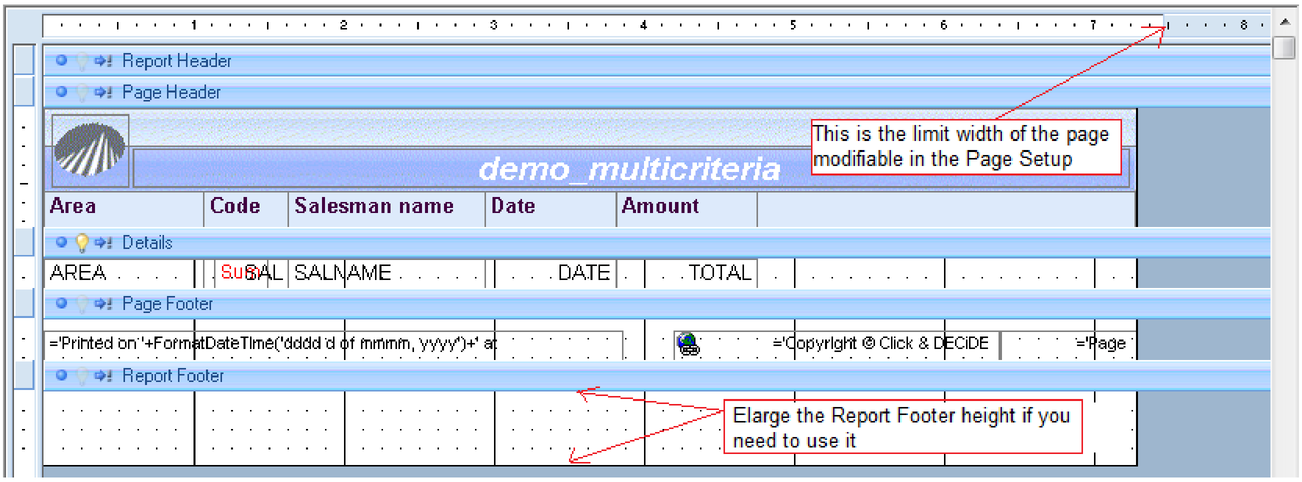
Page Header: printed each time at the top of each page

Details: printed on any page, containing the detailed records

Page Footer: printed each time at the bottom of each page

Report Footer: printed one time at the end of the report. That section is empty by default and you have to enlarge the size block if required.

Other special sections can be created when using the **Break levels** functions. See later the Creating break levels.



By default the Report Header is empty but you can enlarge this block to add a main title and logo for example.

By default the Page Header contains the Column Header of your query and the Title is the query name.

By default the Details contains the column fields of your query.

By default the Page Footer contains the field’s saves in the Report Template such as printed date and time, Copyright and Page numbers.

By default the Report Footer is not visible but you can enlarge this block to add some summary fields or totals.

1.4.1. General Block and Fields Properties

You can apply to each block some properties according to the following table:

Tab/Properties	Report Header	Page Header	Detail	Page Footer	Report Footer
General Tab					
Bookmark	Yes	Yes	Yes	Yes	Yes
Highlight	Yes	Yes	Yes	Yes	Yes
Format Tab					
Form Feed	Yes		Yes		Yes
New Row or Column			Yes		
Insecable Block	Yes		Yes		Yes
Visible	Yes	Yes	Yes	Yes	Yes
Width	Yes	Yes	Yes	Yes	Yes
Height	Yes	Yes	Yes	Yes	Yes
Can Grow	Yes		Yes		Yes
Can Shrink	Yes		Yes		Yes
Background Style	Yes	Yes	Yes	Yes	Yes
Background Color	Yes	Yes	Yes	Yes	Yes
Background Color 2			Yes		
Border Effect	Yes	Yes	Yes	Yes	Yes
Border Style	Yes	Yes	Yes	Yes	Yes
Border Color	Yes	Yes	Yes	Yes	Yes
Border Weight	Yes	Yes	Yes	Yes	Yes
Data Tab					
No property on a Block					

1.4.1.1. Form Feed Property:

This property allows to specify if a section (block) must be printed on the current page or if a break page must be done before (or after or both) to print that section.

Note: the Form Feed property doesn't apply to the Page Header or the Page Footer.

Parameter	Description
No	Default value. The current section (block) is printed on the current page
Before Block	The current section (block) is printed on a new page
After Block	The next section, coming immediately after the current section, will be printed on a new page
Before & After Block	The current section (block) is printed on a new page and the next section, coming immediately after the current section, will be printed also on a new page

1.4.1.2. New Row or Column Property:

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This property allows to specify if a section (block) content must be printed on a new row or new column in a multicolumn report. For example you can use that property to print each header group at the beginning of a new column in a multicolumn report.

Parameter	Description
No	Default value. Click&DECiDE Builder starts printing the section on the current page and finish printing on next page if the content doesn't feed on the same page, according to the Page Set-up parameters.
Before Block	Click&DECiDE Builder starts printing the current section (for example a Group Header) on a new row or column, then print the next section (for example a Detail) on the same row or column.
After Block	Click&DECiDE Builder starts printing the current section (for example a Group Header) on the current row or current column, then print the next section (for example a Detail) on a new row or a new column
Before & After Block	Click&DECiDE Builder starts printing the current section on a new row or column, then print the next section on a new row or a new column.

Note: the New Row or Column property only applies to the Detail bloc.

1.4.1.3. Insecable Block Property

This property allows to specify if a section (block) content must be printed on the same page.

Parameter	Description
No	Click&DECiDE Builder starts printing the section on the current page and finish printing on next page if the content doesn't feed on the same page.
Yes	Click&DECiDE Builder starts printing the section on the next page if the section content doesn't feed on the current page.

1.4.1.4. Visible Property

This property allows to specify if a section (block) or an item (field) must be visible or hidden. It could be useful to keep access to information without displaying it in the result (in a formula for example).

Parameter	Description
Yes	Default value. The block or item is visible
No	The block or item will be hidden when editing or printing the report.

Note: for the **Page Header** this Visible Property is particular:

Parameter	Description
Always	Default value. The Page Header block is always visible
Never	The Page Header block is never visible.
Always except on widow Report Footer Page	The Page Header block is always visible, except when the last Report Footer Page is widow.

1.4.1.5. Height Property

This property allows to specify the **vertical size** for a section (block) or an item (field). The unit is the one defined in the Windows Regional Settings (Inches, centimeters etc.) and two decimals are authorized after the decimal separator. **Note**: a vertical size set to zero is equivalent to the Visible option set to No.

1.4.1.6. Width Property

This property allows to specify the **horizontal size** for a section (block) or an item (field). The unit is the one defined in the Windows Regional Settings (Inches, centimeters etc.) and two decimals are authorized after the decimal separator. **Note**: all the Blocks have always the same width in a report.

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1.4.1.7. Can Grow and Can Shrink Properties

These properties allow to specify if a section (block) or an item (field) can grow or can shrink if the content, when editing or printing, is bigger or smaller than the current size defined. If that property is applied, the block size or the field size will be adjusted vertically automatically when you preview or print the report.

Note 1: the Can Grow/Can Shrink properties do not apply to the Page Header nor the Page Footer. The result can be visible only when editing (preview) or printing the report.

Note 2: if the Can Grow/Can Shrink properties are set to Yes for field items in a Block, this Block must also be defined with the same option set to Yes.

Parameter	Description
Yes	The block size or field size is adjusted vertically depending on the content to be printed or edited (preview)
No	Default value. The block size or field size will not change when printing or editing. Some data can be hidden if the size defined is too small.

1.4.1.8. Background Style Property

This property allows to specify if a section (block) or an item (field) must be transparent or opaque.

Note: if transparent mode is selected, you cannot apply a Background color. As soon as you specify a background color, the Background Style is set to **Opaque**.

Parameter	Description
Transparent	Default value. The background is transparent and the color is the one of the block or the item the most on the background
Opaque	The block or field color will be the one defined with the property Background color.

1.4.1.9. Background Color Property

This property allows to specify the background color for a section (block) or an item (field).

Note: when you specify a color for a block or an item, the Background Style is automatically set to **Opaque** instead of **Transparent**.

The Background Color property uses as parameter a number corresponding to a specific color.

Use that button to display the available colors

Use that button to generate a customised color.

Use that button on the Report Format Toolbar to apply directly a color to the block or field background.

1.4.1.10. Background Color 2 Property

This property allows to specify a second background color for the Details block only that will give an alternate color to the rows in the report edition.

Note: when you specify a color for a block, the Background Style is automatically set to **Opaque** instead of **Transparent**.

The Background Color 2 property uses as parameter a number corresponding to a specific color.

Use that button to display the available colors

Use that button to generate a customised color.

Use that button on the Report Format Toolbar to apply directly the second color to the Details block.

1.4.1.11. Border Effect Property

This property allows to specify the border aspect for a section (block) or an item (field).

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Use that button to display the available border aspects in the combo-box list.

Use that button on the Report Format Toolbar to apply directly a border effect to the block or field:

Sample 2D -The object appears flat.

Sample 3D -The object has a highlight on the top and the left, and a shadow on bottom and right.

Sample 3D Down -The object has a shadow on the top and the left, and a highlight on bottom and right.

Sample Grave -The object has a sunken line surrounding the control.

Sample Shadow - The object has a shadow below and to the right of the control.

Sample 3D Underline - The object has a sunken line below the control.

1.4.1.12. Border Style Property

This property allows to specify the border style for a section (block) or an item (field).

Use that button to display the available border styles in the combo-box list.

Use that button on the Report Format Toolbar to apply directly a border style to the block or field:

Transparent Default value. The border is not visible when editing or printing.

Solid The border is visible as a solid line.

Dash The border is visible as a dash line.

Point The border is visible as a point line.

Dash-Point The border is visible as a dash-point line.

Dash-Point-Point The border is visible as a dash-point-point line.

1.4.1.13. Border Color Property

This property allows to specify the border color for a section (block) or an item (field). The Border Color property uses as parameter a number corresponding to a specific color.

Use that button to display the available colors

Use that button to generate a customised color.

Use that button on the Report Format Toolbar to apply directly a border color to the block or border field.

1.4.1.14. Border Weight Property

This property allows to specify the border weight for a section (block) or an item (field).

Use that button to display the available border weight in the combo-box list.

Use that button on the Report Format Toolbar to apply directly a weight to the block or field border.

Transparent Default value. The border weight is not visible when editing or printing.

1 pt The border weight is the smallest visible, as in the left example.

2 pt The border weight is greater, as in the left example.

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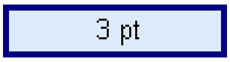
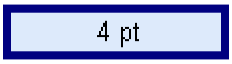


The border weight is greater, as in the left example.



The border weight is greater, as in the left example.

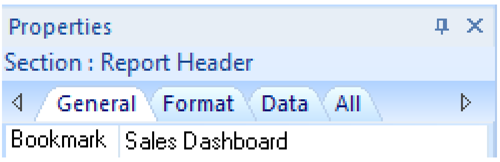
The border weight is greater, as in the left example.

The border weight is the greatest visible, as in the left example.

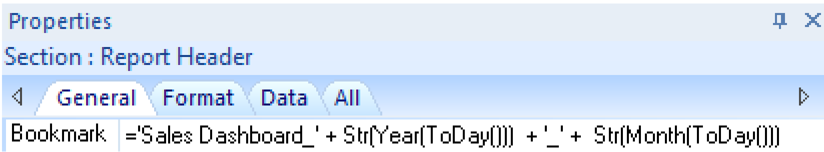
1.4.1.15. Bookmark Property

A bookmark can be displayed when exporting a report to a PDF format (Acrobat Reader).

You can enter a text manually, as a bookmark displaying a fixed Title for the Report Header Block:



But you also can use the  to generate a formula for the bookmark you need to display, example:



Note that the formula automatically adds an equal sign at the first position.

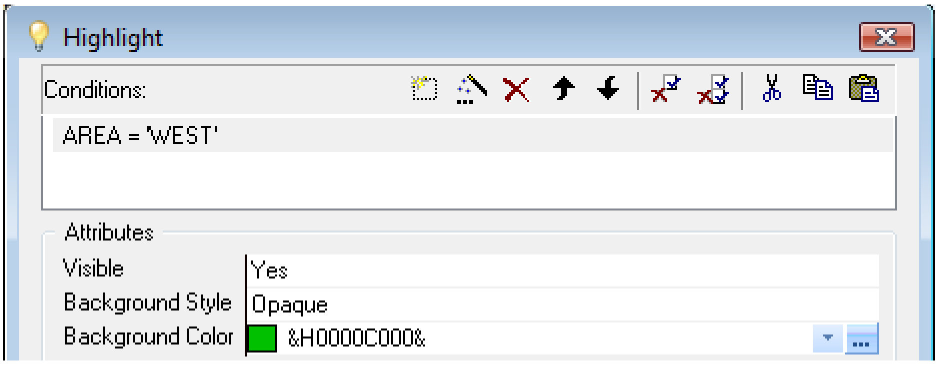
The above formula will generate a bookmark such as “Sales_Dashboard_2015_03” if we are a day of March 2015.

Warning: if you enter a formula manually, without using the Formula Editor, you must enter manually the equal sign at the first position.

1.4.1.16. Highlight Property

A highlight is an attribute modification that can be done automatically according to a predefined condition.

For a **Report Block**, a highlight can affect only 3 attributes: Visible Yes/No, and Background Style and Color:



For a **Report Dynamic Field**, a highlight can affect much more attributes such as:

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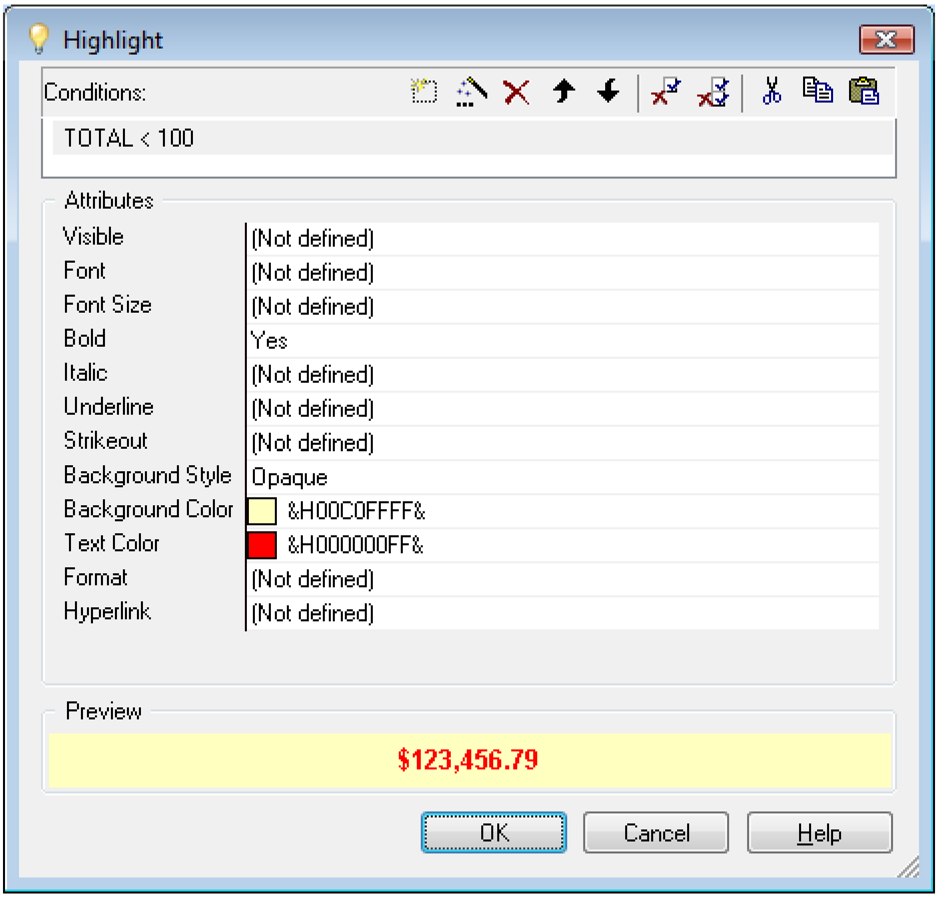


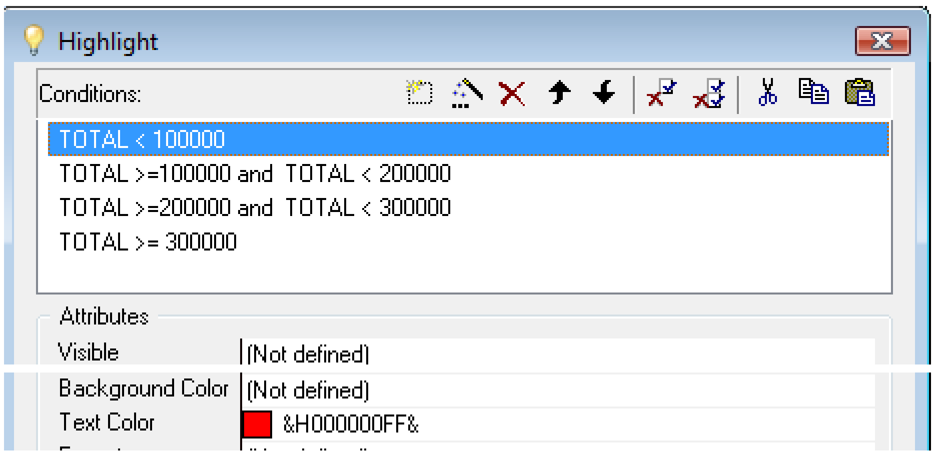
Note the **Format** attribute that allows you to customize a field data format if the condition is true, instead of using the default format.

Note also the **Hyperlink** attribute that allows you to create here a link that can be displayed if the condition is true.

<u>Example 1</u>: this link can call a bookmark in the same PDF Report file, in that case use the # sign followed by the Bookmark Name as in this example: #Events by Hour of the Day

<u>Example 2</u>: A Daily Report can call using this link another Monthly Report, with a formula similar to this example: ='Sales_Monthly_'+ FormatDateTime('yymm', Day_Selected) +'.pdf'.

Note that you can add **several Highlights** on the same object: for example the color of the amount can be different according to the value: the first condition will give a red number if true:



The second condition will give an orange number if true:

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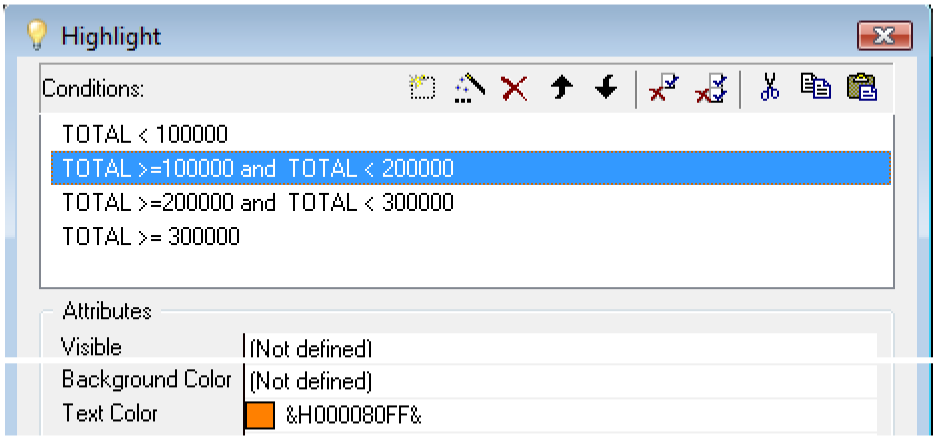
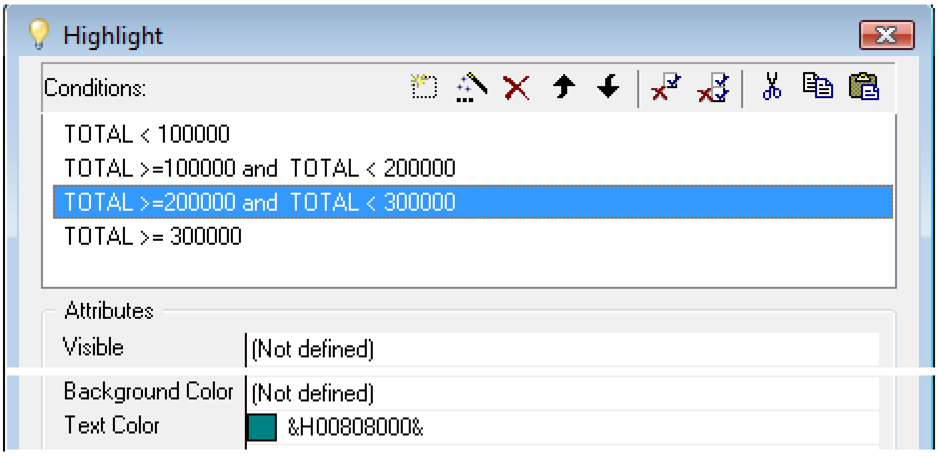
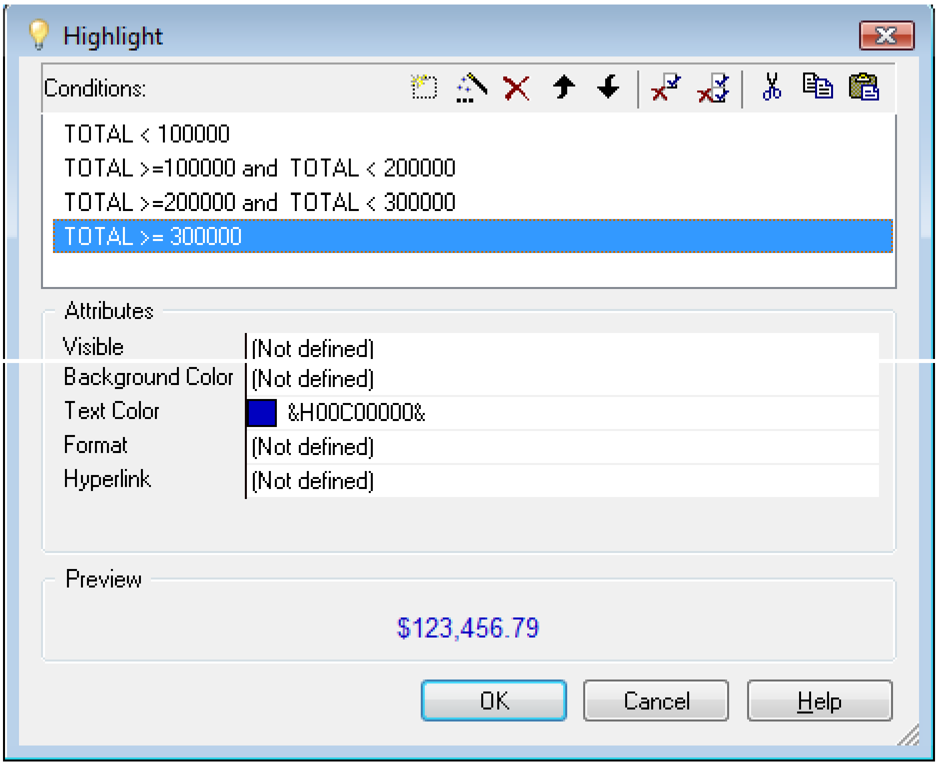


The third condition will give a green number if true:



And the last condition will give a blue number if true:



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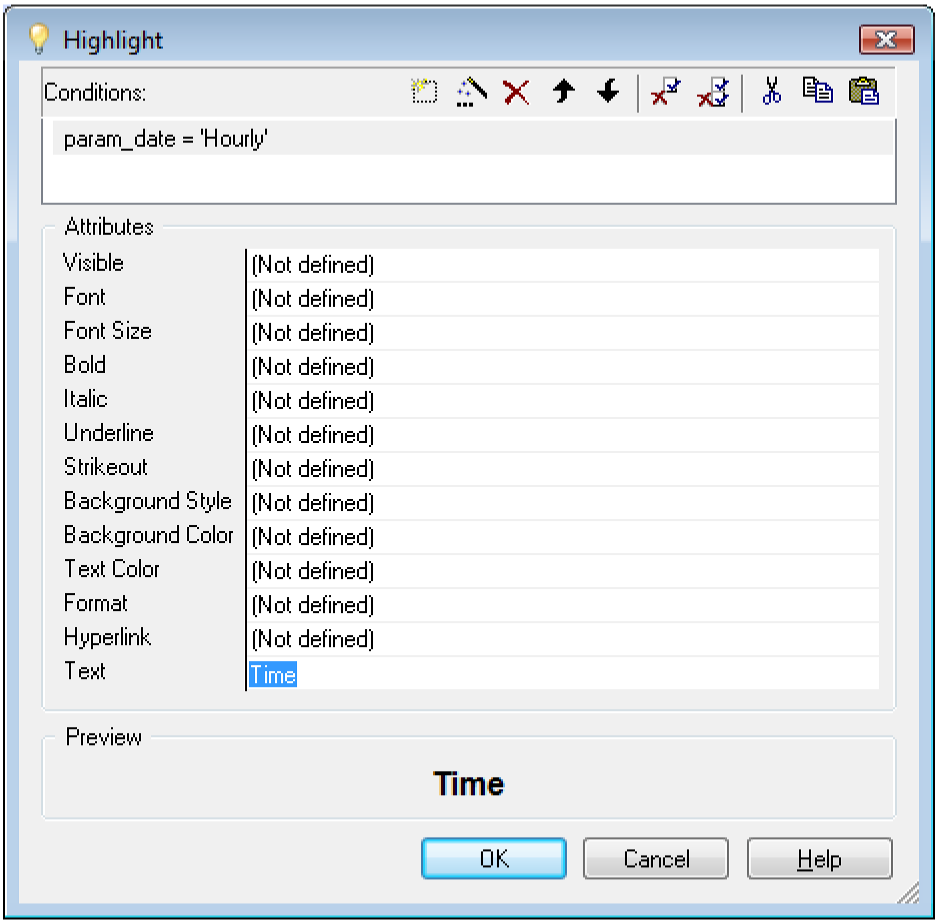
One of the conditions will be always true, so the result will get the corresponding color.

For a **Report Static Field**, a highlight can affect the same attributes list as a Dynamic Field, but also a specific attibute named “Text” allowing to modify a Label Title according to a condition.
Example: in a report a Label Title display the word “Date” by default, when the report is run on a Daily basis. But sometime the same report can be run on a Hourly basis, and in that case the information displayed in the same column will be hour instead of days. The following Highlight condition can modify the Label Title and display “Time” instead of “Date”:



For a **Picture Field**, a highlight can affect the following attributes including the picture to be used, such as a first condition displaying a red cross if the condition is true:

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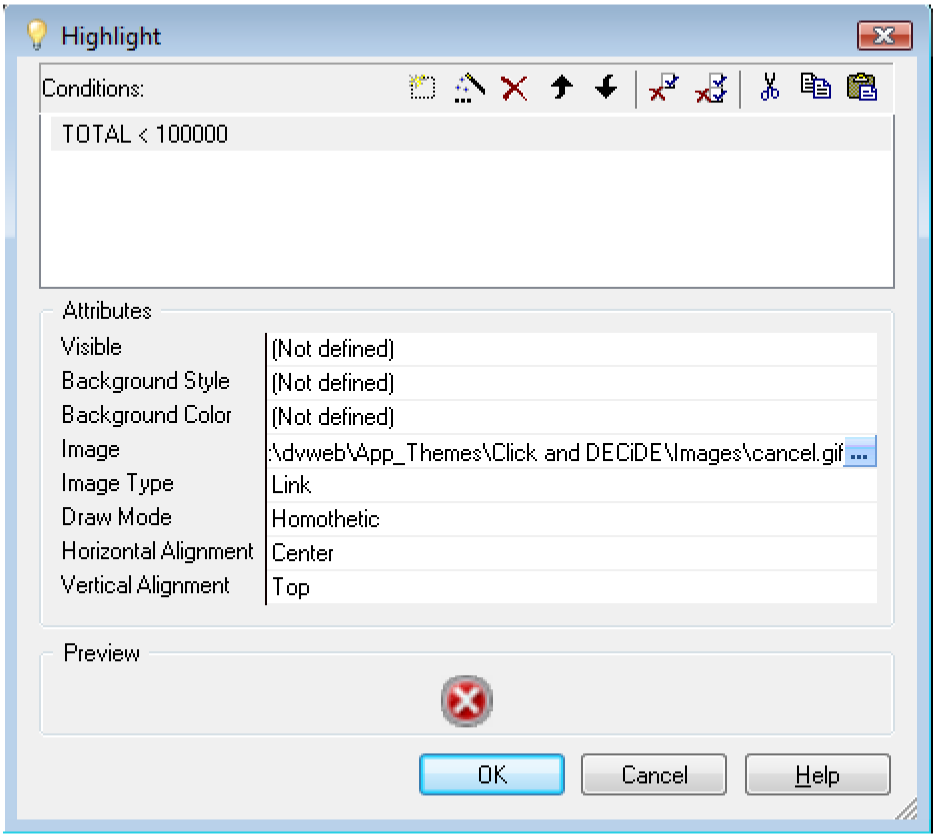
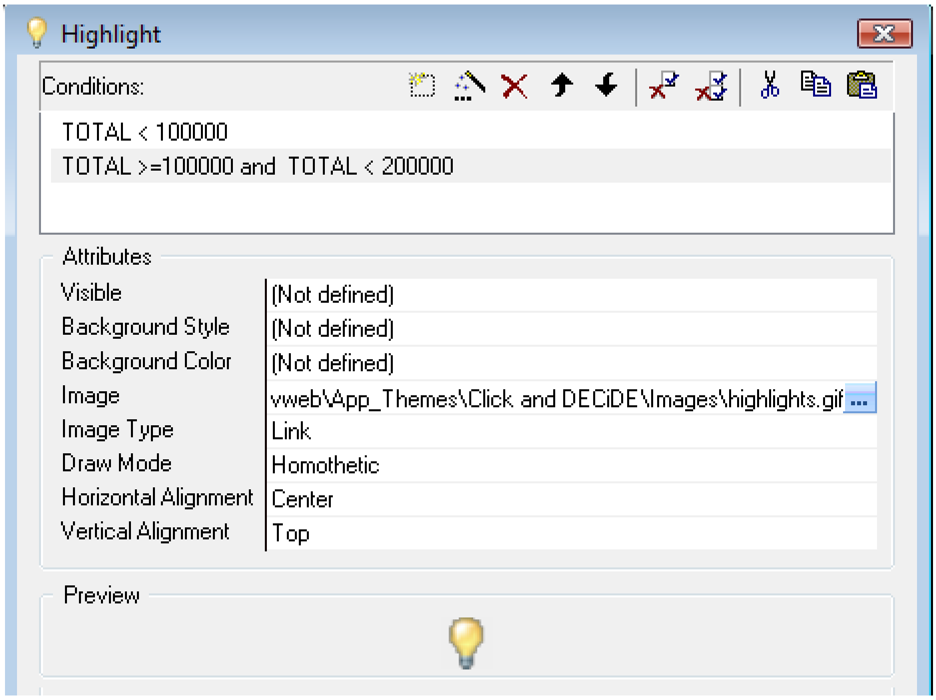


A second condition can display another picture if the condition is true:



A third condition can display another picture if the condition is true:

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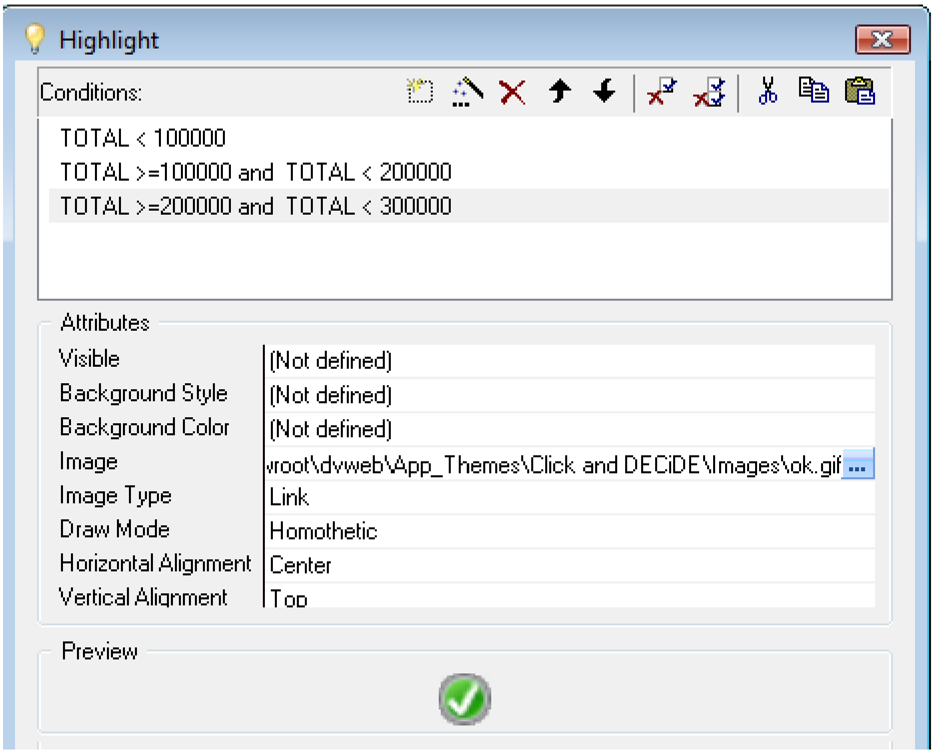
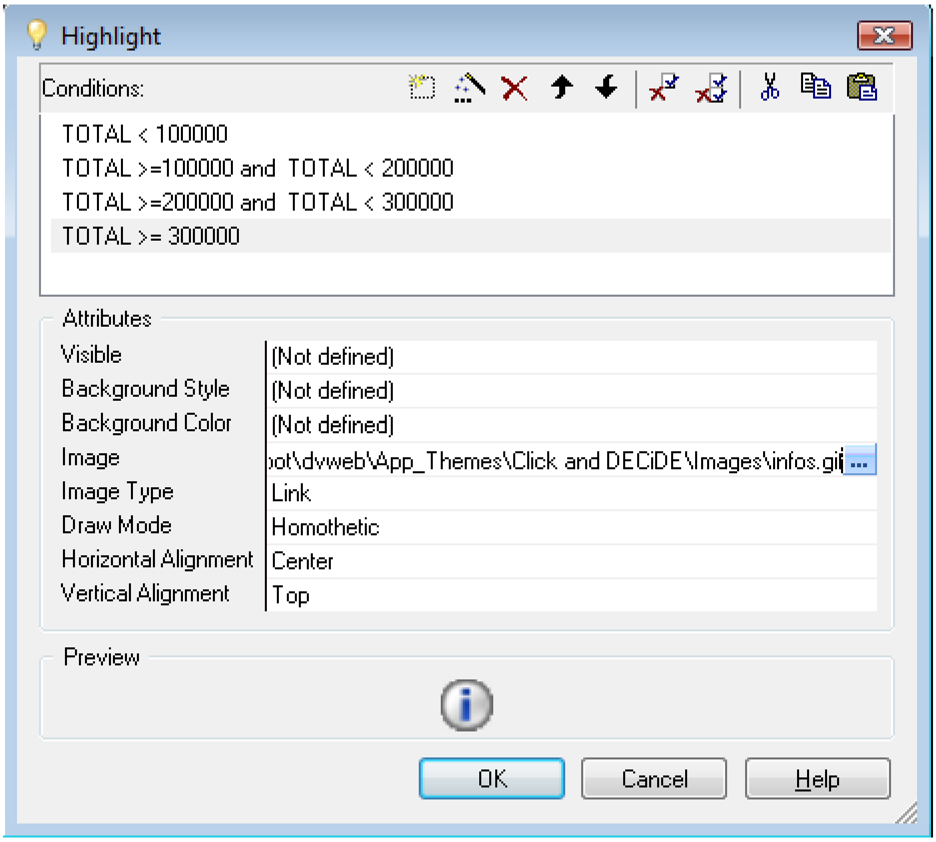


And a last condition display another picture if the condition is true:



The benefit of this method is to be able to display several different pictures using only one picture object.

Test the result for year 2010 for example and see both effects: one on the color result in the Amount column, other one on the picture on the right of the result, in the details block:

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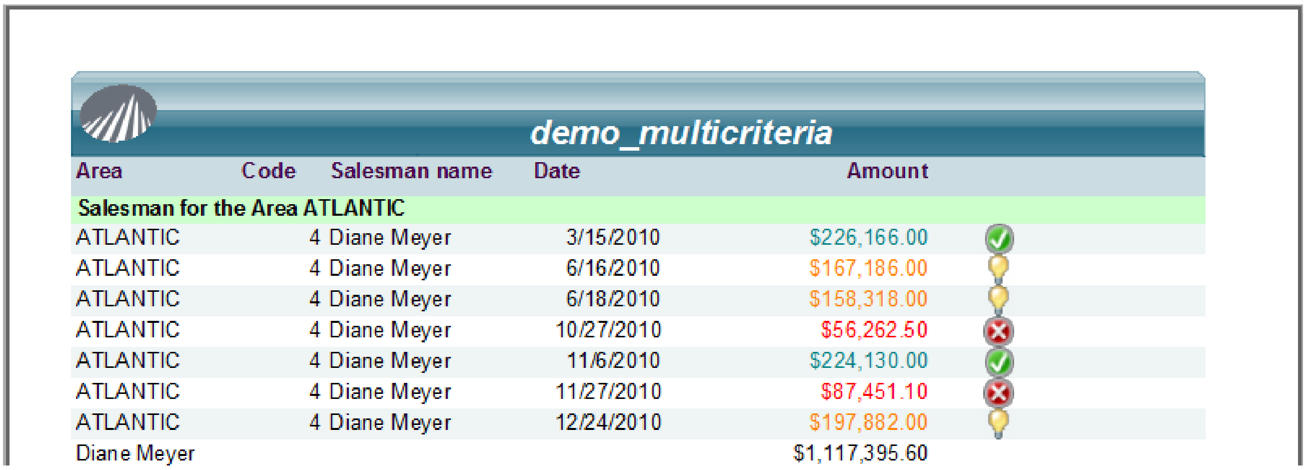


Area	Code	Salesman name	Date	Amount
Salesman for the Area ATLANTIC				
ATLANTIC	4	Diane Meyer	3/15/2010	$226,166.00
ATLANTIC	4	Diane Meyer	6/16/2010	$167,186.00
ATLANTIC	4	Diane Meyer	6/18/2010	$158,318.00
ATLANTIC	4	Diane Meyer	10/27/2010	$56,262.50
ATLANTIC	4	Diane Meyer	11/6/2010	$224,130.00
ATLANTIC	4	Diane Meyer	11/27/2010	$87,451.10
ATLANTIC	4	Diane Meyer	12/24/2010	$197,882.00
Diane Meyer				$1,117,395.60

Note: in the Highlight Dialog Box a toolbar displays the following icons:

New Condition

Edit Condition

Delete Condition

Move Up Item

Move Down Item

Reset the selected attribute to (Undefined)

Reset All attributes to (Undefined)

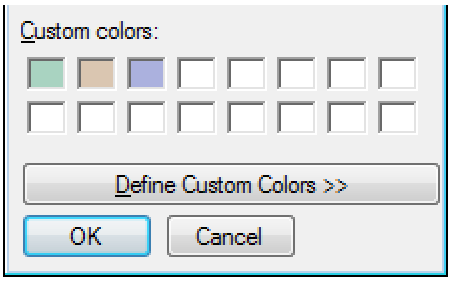
Cut

Copy

Paste

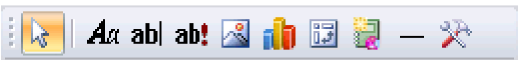
1.4.2. Copying the custom colors

Once you have defined in a report a customized palette of colors, you can use the command **Edit**> **Copy Custom Colors** and then use the command **Edit**> **Paste** in another report or another project file to restore the customized palette without the need to defined all colors again.



1.4.3. Specific Field Properties

Inside each Report Block, you can insert or copy several object types, such as Static Label field (static text), Data or Formula Field (Dynamic field) and other specific objects such as Query Data Object, Picture, Chart, Sub-Report, Cubes, Line, or ActiveX explained later. All these objects are proposed in the following Toolbar:



You can apply to each Static Label or Data/Formula field additional properties according to the following table:

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Tab/Properties	Static Label	Data / Formula	Query Data	Picture	Graph	Cross Table	Sub-Report	Line
General								
Name	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Description	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Hyperlink	Yes	Yes	Yes	Yes	Yes			
Bookmark	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Highlight	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Format Tab								
Format		Yes	Yes					
Visible	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Left	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Top	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Width	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Height	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Hide Duplicates		Yes						
Can Grow		Yes	Yes			Yes	Yes	
Can Shrink		Yes	Yes			Yes	Yes	
Image				Yes				
Image Type				Yes				
Draw Mode				Yes				
Horizontal Alignment				Yes				
Vertical Alignment				Yes				
Background Style	Yes	Yes	Yes	Yes		Yes	Yes	
Background Color	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
Border Effect	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Border Style	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Border Color	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Border Weight	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Text	Yes							
Text Color	Yes	Yes	Yes					
Font	Yes	Yes	Yes					
Bold	Yes	Yes	Yes					
Italic	Yes	Yes	Yes					
Underline	Yes	Yes	Yes					
Strikeout	Yes	Yes	Yes					
Text alignment	Yes	Yes	Yes					
Display							Yes	
Data Tab								

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Tab/Properties	Static Label	Data / Formula	Query Data	Picture	Graph	Cross Table	Sub-Report	Line
Data Source		Yes	Yes		Yes	Yes	Yes	
Aggregate		Yes						
Child Data Link			Yes			Yes	Yes	
Parent Data Link			Yes			Yes	Yes	
Update Method			Yes				Yes	
Assign to Parameter		Yes	Yes					
Series					Yes			
Data					Yes			
First Records					Yes			
Other Series Records					Yes			
Series in rows					Yes			
Reverse Data Order					Yes			
Refresh Data						Yes		
Apply defined levels						Yes		

In the above Table, some Properties are already explained in the previous paragraph. The other Properties are described here:

1.4.3.1. Name Property

This property allows to specify an internal name for an item (label field or data field) that can be used later in a formula for example. Each object must have a distinct name. The name cannot be the same as a data source field name. The name cannot contain space neither special characters.

Note: Click&DECiDE Builder attributes automatically a new internal name by default when inserting a new label field or a new data field or any other object. If the name already exists, a number is added to this name.

1.4.3.2. Data Source Property

This property allows to specify how to feed a dynamic object. A query column name or a formula for a Data/Formula object, a query name for Query Data object, <Report Data> or a query name for a Graph, a report name for a Sub-Report, a cross-table name or a Cross Table.

1.4.3.3. Aggregate Property

This property only applies to Data / Formula object, and allows to generate a grouping function in the report, such as Sum, Min, Max, Average, Count, Standard Deviation and Variance.

1.4.3.4. Child and Parent Data Link Property

This property only applies to Query Data, Sub-Report and Cross-table objects, and allows add a criteria between a column of the report data source and the object data source. This property will be described more in detail later for the concerned objects, and is mainly used when creating Break Levels in a report.

1.4.3.5. Assign to parameter Property

This property allows to assign the field content to a parameter that can be used later in the same report inside a formula, or in a sub-report, or in another report belonging the same Report Book if the query of this report is also referenced with the same parameter.

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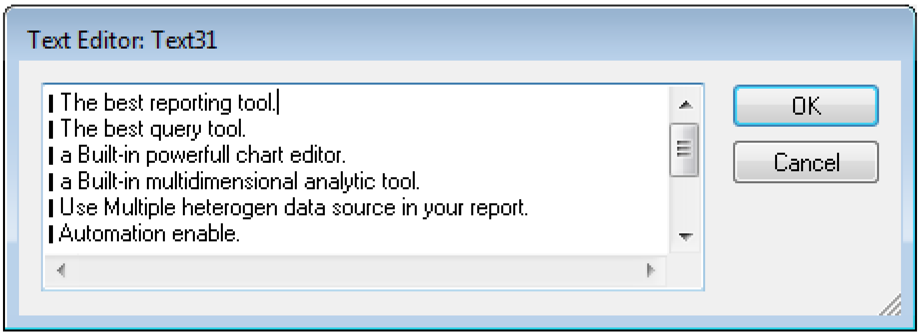
1.4.3.6. Text Property

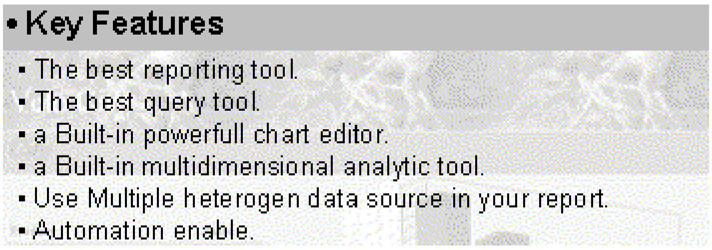
This property allows to specify the visible text for a Static label field such as a Title, a Sub-Title, a Column name, a Comment etc.

Note : Click&DECiDE Builder attributes automatically the default text "Text" to any new label field inserted inside a block report. You can use the **Format Tab** in the Properties Dialog Box to see or modify it.

If the text you want to type is quite long, you can use the **Text Editor** by clicking on the right browse button. Example: the following text in the Text Editor



Will give this result in the Report:



1.4.3.7. Format property

This property allows to specify the format to be used to display the data field content when editing or printing the report.

Note: Click&DECiDE Builder proposes automatically several Windows default standard formats depending on the field type (text, numeric, date, time or timestamp) and your Regional Settings. You can modify them.

Use that button to display the available formats depending on the field type

Parameter	Description
0,00	Example for numeric value without thousand separator and semicolon as decimal separator
#.##0,00	Example for numeric value with a dot as thousand separator and semicolon as decimal separator
#.### £	Currency with the English pound without decimals
#.##0,00;-#.##0,00;<Null>	Example for numeric value with a dot as thousand separator, a semicolon as decimal separator, a minus sign for negative values and a Null information for null content.
# ##0,00 €;-# ##0,00 €;<Null>	Example for numeric value with a space as thousand separator , a semicolon as decimal separator, a € for Euro money, a minus sign for negative values and a Null information for null content.
0%	Example for numeric value with a percentage presentation, without decimal
dd/mm/yyyy	Example for a date value, with 2 numbers for the day, 2 numbers for the month and 4 numbers for the year.

Parameter	Description
dd/mmm/yyyy	Example for a date value, with 2 numbers for the day, 3 first character for the month and 4 numbers for the year.
hh:mm:ss	Example for a time value, with 2 numbers for the hour, 2 numbers for the minutes and 2 numbers for the seconds.
dd/mm/yy hh:mm	Example for a timestamp value, with 2 numbers for the day, 2 numbers for the month, 2 numbers for the year, 2 numbers for the hour, 2 numbers for the minutes and no seconds.

1.4.3.8. Left Property

This property allows to specify the object **position from the Left border** of the **Report**. The unit is the one defined in the Windows Regional Settings (Inches, centimeters etc.) and two decimals are authorized after the decimal separator.

1.4.3.9. Top Property

This property allows to specify the object **position from the Top border** of the current report **Block**. The unit is the one defined in the Windows Regional Settings (Inches, centimeters etc.) and two decimals are authorized after the decimal separator.

1.4.3.10. Hide duplicates property

This property allows to specify if an item (dynamic field) must be duplicated or not on each row on the same page when the content doesn't change. **This option only concerns the Detail Block (section) in a report**. It could be useful to not display the same information on each row when the content of a field is equal to the content of the previous record.

1.4.3.11. Image Property

This property only applies to an Image object and allows to specify the full path and file name for the required picture. Example: C:\Users\Public\Documents\Click and DECiDE Samples\Builder\mountain.JPG

Note 1: this path can contain some parameters as you can see in the report example "Sales by Category" in the Click and DECiDE Demonstration.wfv project file. In that example note that the **Image Type** must be set to **Formula**.

```
='%CND_BAI_SAMPLES%\Builder\'  +  "CATEGORY_NAME"  + '.JPG'
```

Note 2: the picture file name can be defined using the Highlight Property in the General Tab as describe in the Highlight paragraph. In that case, no picture files name need to be defined in the Image Property.

1.4.3.12. Image Type Property

This property only applies to an Image object and allows to define if the picture is:

Included in the report: in that case you don't need to give the picture with the project file to somebody else, but the project size could be affected by many big pictures.

Linked to the report: in that case you need to give the picture separately with the project file to somebody else, but the project size is not affected by the number of pictures.

Example:
`C:\Program Files\Click and DECiDE\BAI\Templates\Images\cndlogo_45_45.png`

Formula: must be used if you specify a formula in the **Image Property** box as the above example with the variable environment and the parameter name.

1.4.3.13. Draw Mode Property

This property only applies to a Image object and allows to modify the picture presentation among 4 choices: Normal, Stretched, Homothetic and Mosaic.

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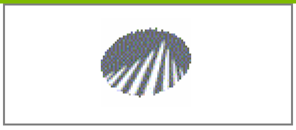
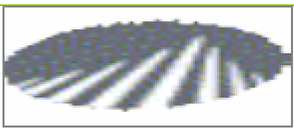
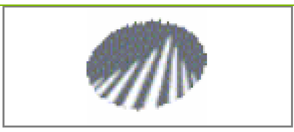
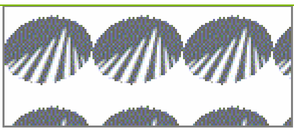
Draw Mode		Description
Normal		Default value. The picture will be displayed with the original size without the need recalculate the size when editing or printing the report, saving resources for the program.
Stretched		The picture will be displayed extended or reduced to fit the size object. Distortion can thus occur if needed.
Homothetic		The picture will be displayed to fit the size object without distortion.
Mosaic		The picture will be displayed to fit the size object in a mosaic mode

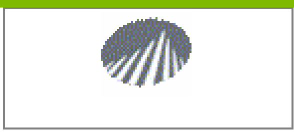
1.4.3.14. Horizontal Alignment

This property only applies to an Image object and allows to define the horizontal position in the object.

Horizontal Alignment		Description
Left		The picture will be displayed on the left side of the object.
Center		Default value. The picture will be displayed in the center of the object (horizontally).
Right		The picture will be displayed on the right side of the object.

1.4.3.15. Vertical Alignment

This property only applies to an Image object and allows to define the vertical position in the object.

Vertical Alignment		Description
Top		Default value. The picture will be displayed on the top side of the object.
Center		The picture will be displayed in the center of the object (vertically).
Bottom		The picture will be displayed on the bottom side of the object.

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1.4.3.16. Series Property

This property only applies to a Graph object. You can specify here which column has to be used as **series** for the graph. It could be one or several columns. The column could be a query column or a report dynamic field. Use the icon to display this column list or the icon to select several query or report columns.

1.4.3.17. Data Properties

This property only applies to a Graph object. You can specify here which column has to be used as **data** for the graph. It could be one or several columns. The column could be a query column or a report dynamic field. Use the icon to display this column list or the icon to select several query or report columns.

1.4.3.18. First Records Property

This property only applies to a Graph object. You can add a Top value specific to the Graph if you wish to limit the data displayed by a Graph without limiting the report data. It is useful for example for a Pie Chart because when you have more than 20 or 25 sectors, the Pie Graph can be not very readable.

1.4.3.19. Other Series Properties

This property only applies to a Graph object. This option allows you to specify a Legend Text to all other series that will be displayed as one additional series if the Top Value specified in the First Records Property is reached.

1.4.3.20. Series in Rows

This property only applies to a Graph object. The default value for a new Graph is Series in Columns. You can switch her for the option “Series in rows” if needed. It is useful for example sometimes with a Pie Chart.

1.4.3.21. Reverse Data Order

This property only applies to a Graph object. You can change the order of the displayed data (Left/Right or Top/Bottom).

1.4.3.22. Text Color Property

This property allows to specify the text color for an item (Label field or Data field). The Text Color property uses as parameter a number corresponding to a specific color.

Use that button to display the available colors.

Use that button to generate a customised color.

Use that button on the Report Format Toolbar to apply directly a color to the label or data field text.

1.4.3.23. Font Property

This property allows to specify the font for an item (Label field or Data field).

The Font property uses as parameter a font name chosen in the list proposed by your Window configuration.

Use that button to display the available font parameters on your machine (the dialog box provided allows you to select a font, a style (bold, italic, etc.), a size, a color, a special effect such as underlined etc..

1.4.3.24. Bold Property

This property allows to apply a **bold** effect to a item content (Label field, Data field or Query Data field).

1.4.3.25. Italic Property

This property allows to apply a *Italic* effect to a item content (Label field, Data field or Query Data field).

1.4.3.26. Underline Property

This property allows to apply an <u>Underline</u> effect to a item content (Label field, Data field or Query Data field).

1.4.3.27. Strikeout Property

This property allows to apply an ~~Strikeout~~ effect to a item content (Label field, Data field or Query Data field).

1.4.3.28. Text Alignment Property

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This property allows to specify the Alignment required for a label or data field text.

Use that button to display the available alignment effects in the combo-box list or use directly the following toolbar buttons:

Use that button on the Report Format Toolbar to align directly the text on the **Left** border of the field.

Use that button on the Report Format Toolbar to align directly the text on the **Center** of the field.

Use that button on the Report Format Toolbar to align directly the text on the **Right** border of the field.

1.4.3.29. Description Property

This optional property allows to specify a description for an item that can be displayed later when editing a formula for example. The current description will appear in the Description box when using the Quick Expression formula generator. This description will also be used when exporting a report to Excel, allowing to align all objects having the same description in the same column.

This is useful when you create a formula that will be used later from within another formula. The description will help you to remember what the purpose of each formula is.

Example: a virtual field named TOTAL_PRICE will receive the formula (price * qty) * (1-discount) and the description "Price after discount". Now a new formula can be created to apply the local tax. When editing the formula from within the Quick Expression generator, the field TOTAL_PRICE will display the description "Price after discount" in the Description box:

1.4.3.30. Hyperlink Property

This property allows to enter an URL or Hyperlink calling for example:

a Web site: ='http://www.clickndecide.com'

a Bookmark in the same PDF report: #HomePage or '#'+ Username (if Username is a dynamic query field used in the report)

a Bookmark in another PDF report using a formula: ='Statistics_Monthly_'+ FormatDateTime('yymm', Day_Selected) +'.pdf', Day_Selected being a parameter name.

an URL calling a PDF or HTML report including one or several parameters: ='/dvweb/display.aspx?__mnu_alias=Demonstration&__mnu_itemid=2357&__format=HTML&AREA_PARAM ='+AREA+'&__exec=1'.

1.4.3.1. Refresh Data

This property only applies to a Cross table object and allows you to specify if the Cross table must be recalculated at the runtime report. If not the data saved in the cross-table data file (*.vpd) will be used.

1.4.3.2. Apply defined levels

This property only applies to a Cross table object and allows you to specify: **Yes**, the levels defined with condensed or detailed mode will be applied as they have been saved, or **No**, do not apply the defined levels and make them all detailed.

1.4.3.3. Display Property

This property only applies to a Sub-Report object. This function proposes by default to retrieve from a sub-report only the **Detail and Break Blocks**. But you can ask to retrieve **All Blocks** from a sub-report if you also need to retrieve the title, the column headers and the total fields (in the Report Footer Block) from the sub-report.

1.4.3.4. Update Method

This property only applies to a Sub-Report or Query/Data object: **Optimized** means that the SQL calculated to run a sub-report or query/data is done only one time, as parameter values are known and Child Data Link and Parent Data Link are known. **Forced** means that this SQL will be recalculated each time. This can be used when a parameter value can change because of the use of the "Assign to parameter" feature.

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1.5. Report Properties

If you click the icon, you will get the Report Properties, with 3 specific properties applying to the whole report:

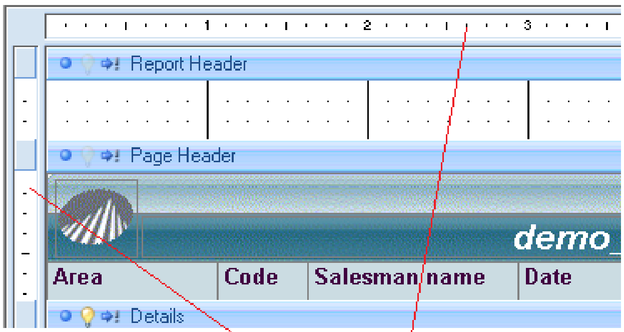
Report Property	Description
Run Condition	The value of a parameter can be evaluated here to check if a condition is true of false. If false the report will not be printed, avoiding an empty page inside a Report Book.
Single Page HTML export	This option allows to specify that the current report must be exported using only 1 page if the output format is HTML.
Web Part Entry Chart	This option allows to specify the graph to be used as an entry point into a Web Part created in the Web Portal. The URL, with HTML output, copied from this report will only display the selected Graph in the Web Part, but the URL proposed in the Title will drill-down to the full report. (Refer to the Click&DECiDE Web Portal User Guide Manual to know more about Web Parts).

1.6. Report Toolbars and Look

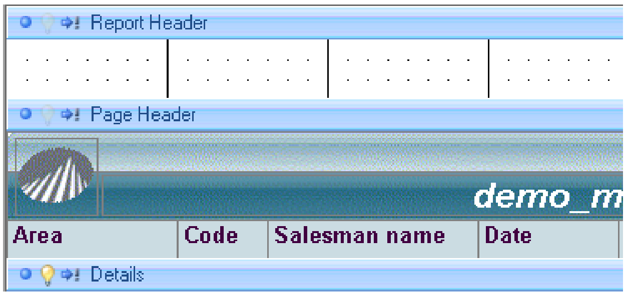
You can modify the report look by using the commands:

1.6.1. View> Ruler

This command will show or hide the vertical and horizontal rulers:



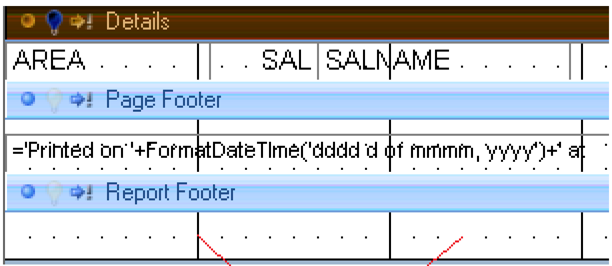
With Ruler



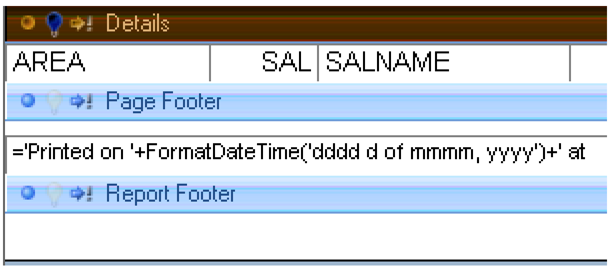
Without Ruler

1.6.2. View> Grid

This command will show or hide the grid:



With Grid



Without Grid

1.6.3. View> Header and Footer Blocks

Use the command **View> Report Header/Footer** to display or remove with one click the Report Header Block and the Report Footer Block. Warning: when you remove these blocks, a message prevents you that you will lose their content.

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Use the command **View> Page Header/Footer** to display or remove with one click the Page Header Block and the Page Footer Block. Warning: when you remove these blocks, a message prevents you that you will lose their content.

1.6.4. View Toolbar

This command allows to display several Toolbars.

1.6.4.1. Toolbar

See the legend to know what icon is doing.

1.6.4.2. Toolbox

See the legend to know which kind of object each icon will add in your report.

1.6.4.3. Layout Bar

Use this toolbar to modify the objects and fields layout.

1.6.4.4. Alignment/Resize Bar

See the legend to know what icon is doing.

1.6.4.5. Spacing Bar

See the legend to know what icon is doing.

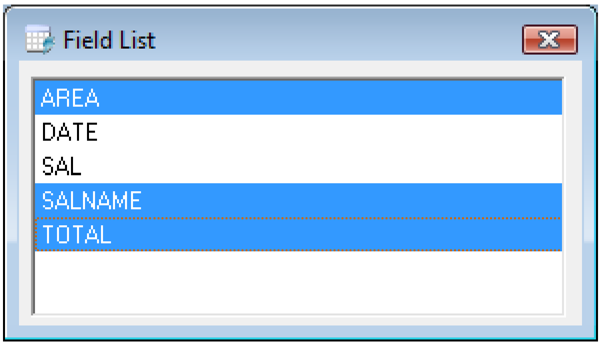
1.7. Reports Objects and Fields

Once a report has been created, with the default blocks containing the default objects and fields according to the query structure, you can wish to:

1.7.1. Add a new query field

If you need to add some fields in a report already based on an existing query, do the following steps:

1. Click the Report Property icon then select the Data Tab where you will see the query name used a data source. Click the icon to open the query. Select the new required field(s) in the query and save the query.
2. Close the query and go back to the report based on that query.
3. Click now the Query Field list icon or on the command **View> Field list** and you will get a window containing all the query fields:



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4. Select one or several field(s) in the above list (using the Shift+click or Ctrl+Click) and make a drag and drop to the required location in your report, in the concerned block. Drop the mouse button when the target location is correct. The new field(s) is (are) inserted on the target location.
5. Note that you have to create and add yourself the heading text if required in the Page Header Block for the new inserted fields.

1.7.2. Add a new report field or object

If you need to add other reports objects, use the command **View> Tools Bar> Toolbox**

1.7.2.1. Static Text (Label)

1. Click to add a new static text.
2. Define the target location in the required block by drawing a frame with the dimension you need.
3. Release the mouse.
4. Enter now the Text in the Text box in the Properties Format Tab.

1.7.2.2. Dynamic field (Data/Formula)

1. Click to add a new dynamic field that could be fed by a query field or a report formula.
2. Define the target location in the required block by drawing a frame with the dimension you need.
3. Release the mouse.
4. Select the Properties Data Tab and click the icon in the Data Source box to select a query field or click the icon to open the Quick Expression Editor to enter a formula.

1.7.2.3. Query Data

1. Click to add a special Query Data object
2. Define the target location in the required block by drawing a frame with the dimension you need.
3. Release the mouse. This object must be fed by a query but will display only the result of the **first row** and the **first column** of this query.
4. Select the Properties Data Tab and click the icon in the Data Source box to select a query name or click the icon to create the appropriate query if needed.

1.7.2.4. Picture

1. Click to add a picture
2. Define the target location in the required block by drawing a frame with the dimension you need.
3. Release the mouse. A dialog box immediately opens to search for the picture file name.
4. Select the image file and click **Open**.
5. Select then the Properties Format Tab to specify the Image Type, Draw Mode, Horizontal and Vertical Alignments.

1.7.2.5. Graph

1. Click to add a dynamic chart
2. Define the target location in the required block by drawing a frame with the dimension you need.
3. Release the mouse. A dialog box immediately opens to offer a choice of chart templates.
4. Select the one you need and click **OK**.
5. Select the Properties Data Tab where the Data Source box is defined by default with <Report Data>.

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6. Specify then the Series and Data boxes using the icon to select a report field, or the icon to open a dialog box allowing to select several report fields. Note that <Report Data> will build the Graph using the report data, avoiding to run a separate query. Nevertheless a Graph can also be fed directly by a query. If a query name has been used and you want to display again <Report Data>, display the query list and select the <Report Data> in first position or delete the query name with the **Del** key and press **Enter**.
7. Optional: define a Top value in the First Records box if you want to limit the number of values for the Graph, the extra data will be display as one value whose legend can be defined in the Other Records Series.
8. Optional: right click on the Graph and select the **Edit** command to open the Click and DECiDE [Chart Designer](#).
9. Once you have modified the Graph using the Chart Designer you can save your own **template** using the command File> Save As and give a customized file name to the template (MyGraph.cfx), located by default in the C:\Program Files\Click and DECiDE\BAI\ChartModels directory.

1.7.2.6. Cross-Table

1. Click to add a dynamic cross-table.
2. Define the target location in the required block by drawing a frame with the dimension you need.
3. Release the mouse.
4. Select the Properties Data Tab and click the icon in the Data Source box to select a cross-table name or click the icon to open the specified cross-table.
5. If needed, specify the Child and Parent Data Links.
6. Change, if needed, the option Refresh Data defined to **Yes** by default.
7. Change, if needed, the option Apply Defined Levels defined to **Yes** by default.

1.7.2.7. Sub-Report

1. Click to add a dynamic sub-report.
2. Define the target location in the required block by drawing a frame with the dimension you need.
3. Release the mouse.
4. Select the Properties Data Tab and click the icon in the Data Source box to select a report name or click the icon to open the specified report.
5. If needed, specify the Child and Parent Data Links.

1.7.2.8. Line

1. Click to add a static line.
2. Define the target location in the required block by drawing a line with the dimension you need.
3. Release the mouse.
4. Specify the Border Weight as well as the other attributes.

1.7.2.9. ActiveX Control

1. Click to add an ActiveX control.
2. Select the required ActiveX in the proposed list.
3. Define the target location in the required block by drawing a frame with the dimension you need.
4. Release the mouse. In the Properties Data Tab, the OLE Class and Class boxes are automatically fed.

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5. Only specify the query field in the Data Source box. Note that the General Tab is depending on the ActiveX object and contains many parameters reserved to advanced users.

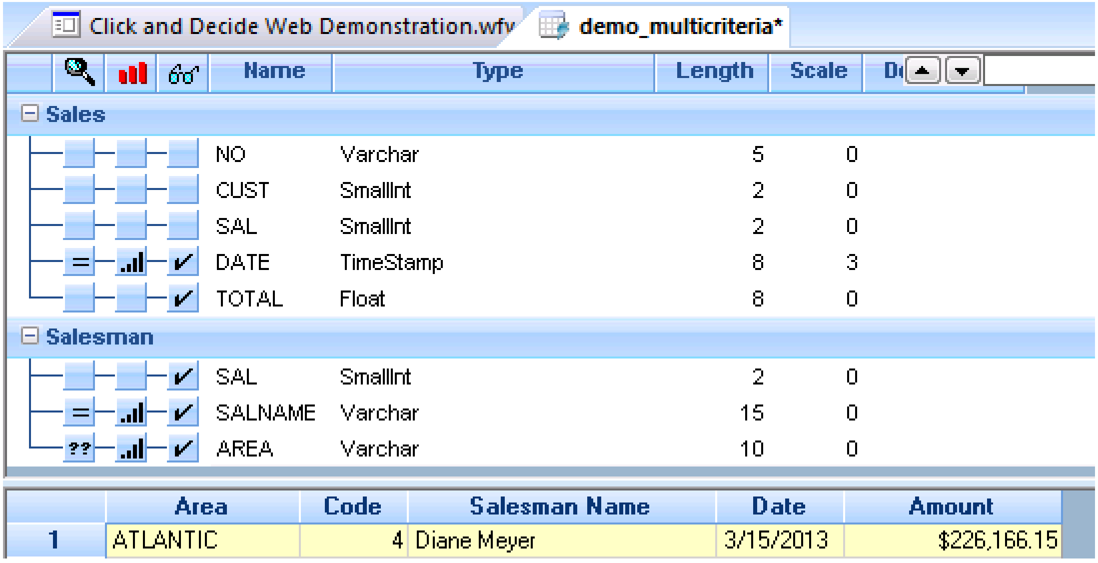
1.8. Creating Break Levels

Click&DECiDE Builder allows to create several break levels in a Report. Each break level will allow to display a **Group Header Block** before the Detail Block and a **Group Footer Block** after the Detail Block. Each of these groups can display Static or Dynamic Title, and also calculated fields to display totals, averages, minimum, maximum etc. Data can be sorted inside the report through each break level.

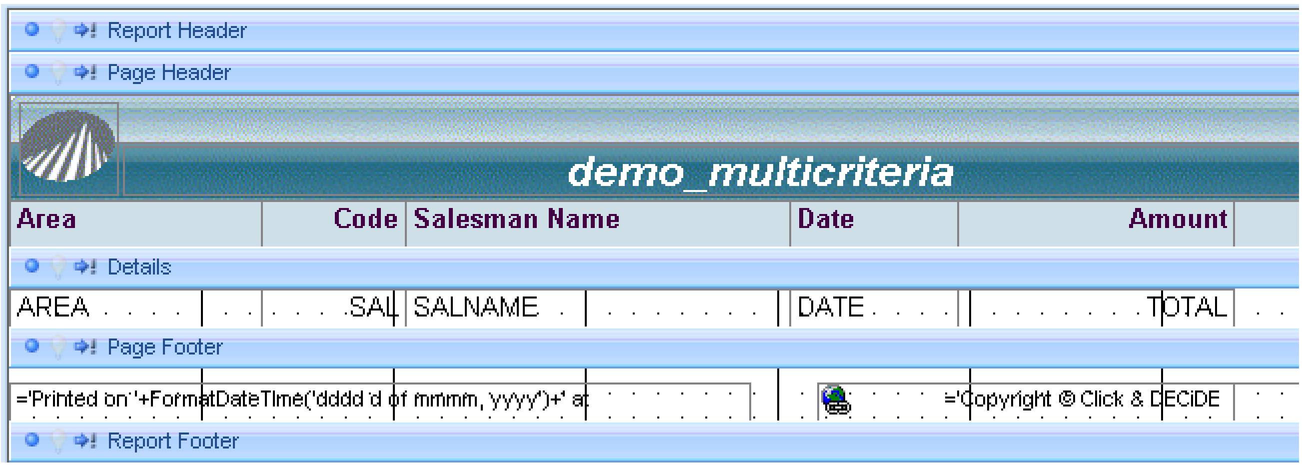
To explain the Break Structure, the best is to create a report as an exercise and to build, step by step, several break levels.

To do so, we are going to make an example starting with a query joining the tables SALES and SALESMAN from the Secured SQL Server Database. You can use the demo_multicriteria query from the **Click and DECiDE Web Demonstration.wfv** project file or create the same query. (Refer to the Click&DECiDE Query User Guide.pdf manual if needed).

1. Open the query **demo_multicriteria** (or make a copy), it should look like:



2. Create a Report using a Template:



3. Save this report as **Report Training** for example.

4. Now, click on the command **View> Field group** or on the icon to get the following dialog box:

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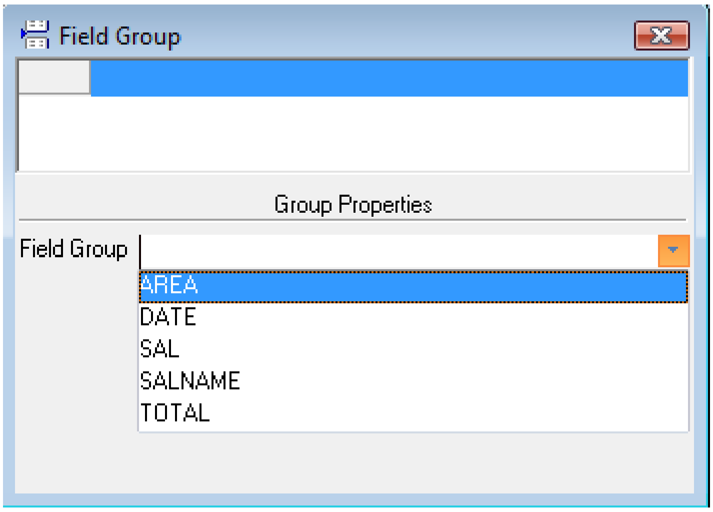
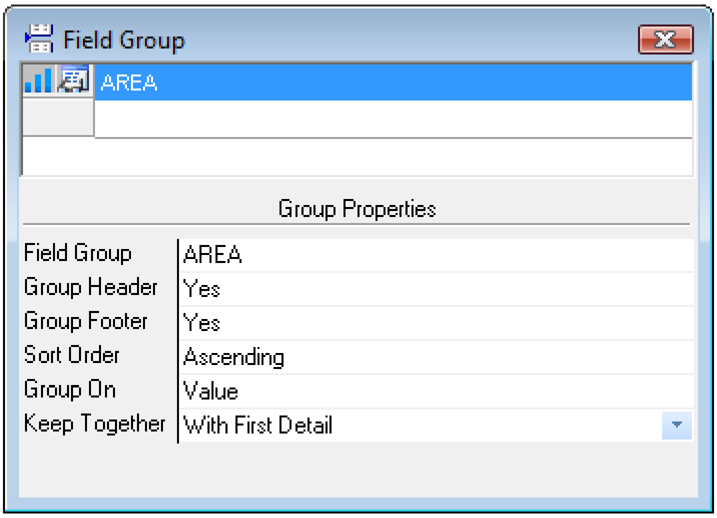


5. In the above screen, click the arrow on the right of the **Field Group** box to get the query column list and select for example the AREA field to create a break level for each Area:



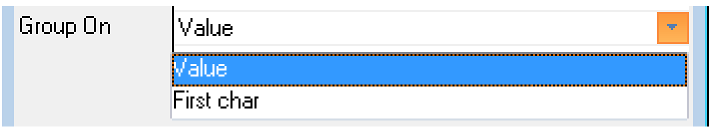
6. Select **Yes** for both **Group Header** and **Group Footer** and select "**With First Detail**" in the last option.

   Group Header: That group will be display **before** the rows concerning the break level. Generally used to inform what will be the next break information

   Group Footer: That group will be display **after** the rows concerning the break level. Generally used to generate calculation fields like Sum, Min, Max, Average etc. concerning the rows of the previous break level.

7. **Sort Order**: by default Ascending is proposed. You can switch to Descending or None. Warning: the None option can be used only if you are sure to get the data sorted in the query in a right way for the break levels.

8. **Group on**: make a choice among:



- **Value** and **First Characters** for a **Text** field. if Value is selected, the break level will be done on the entire value content, if First Char is selected, you can specify how many characters must be used to produce a break level. (For example the 2 first characters of a postal code in France will produce a break level on the Department area)

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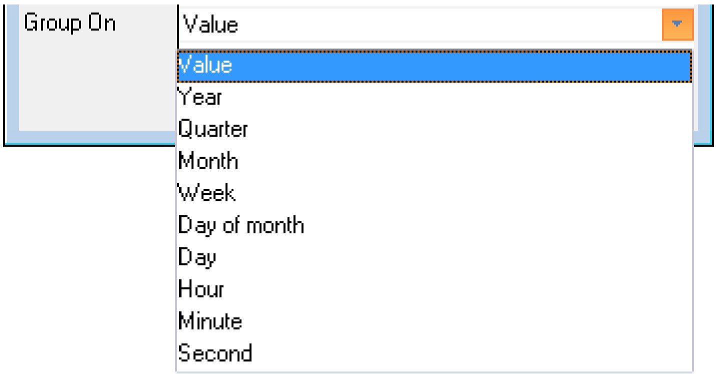
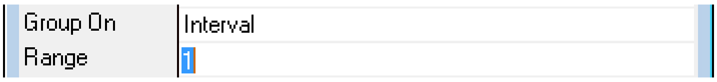


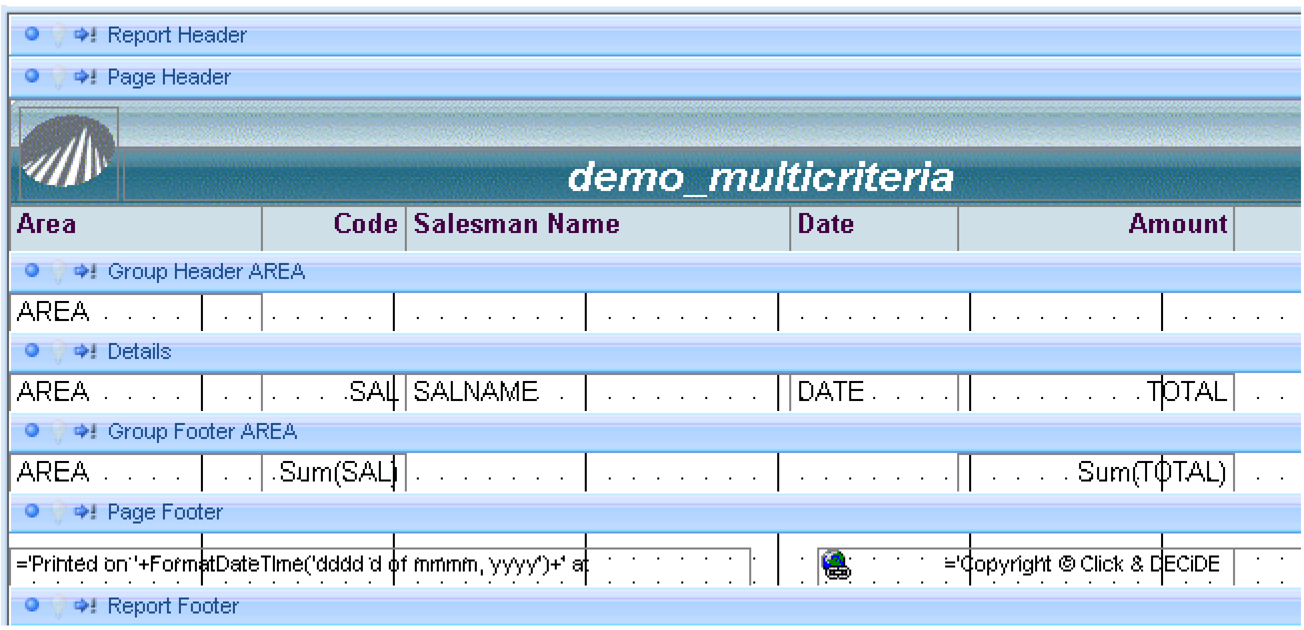
- **Value** and **Year/Quarter/Mont/Week/Day of month/Day/Hour/Minute/Second** for a **Date** field. if Value is selected, the break level will be done on the entire value content, if a Date Time dimension is selected, you can specify the periodicity to be used to produce a break level. (Each year, each month etc.). Day of the Month will produce a break by day (but taking care about the date), whereas Day will produce a break by day without taking care about the date, unless this break is created after a Month Break.



- **Value** and **Interval** for a Numeric field: if Value is selected, the break level will be done on the entire value content. If Interval is selected you can specify the interval range.

9. **Keep Together**: you can select an option among **No**, **Entire group** or **With first detail**.
   - If **No** is selected, a new page can be created regardless the state of the current break level
   - if **Entire group** is selected a page break will be done if the new Break level cannot be displayed or printed on the current page
   - if **With first detail** is selected, the new Break level will start on the current page only if several first detailed row can be displayed on the current page, if not a page break will be done.

We have defined in the previous example a first break level on the AREA field. The report should appear like the following example:



By default the Group Header AREA contains the field used in this break level, to display the name of the next area coming in the report edition, and by default the Group Footer AREA also contains the field used in this

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break level to display the name of the just listed Area, but also contain the sum of any numeric field, to display the sum of the TOTAL field after each Area (first break level). In this example we will delete the field SUM(SAL) because we do not need a total on the Salesman code, but we will keep the Sum(TOTAL).

You can edit the properties of the AREA field in the Group Header Area block and modify in the Data Source box in the Data Tab the AREA field into a formula such as 'Salesmen for the area ' + AREA that will appear with the equal sign in the Data Source box ='Salesmen for the area '+AREA.

Warning: be sure to enlarge enough the width of this field to not truncate the result.

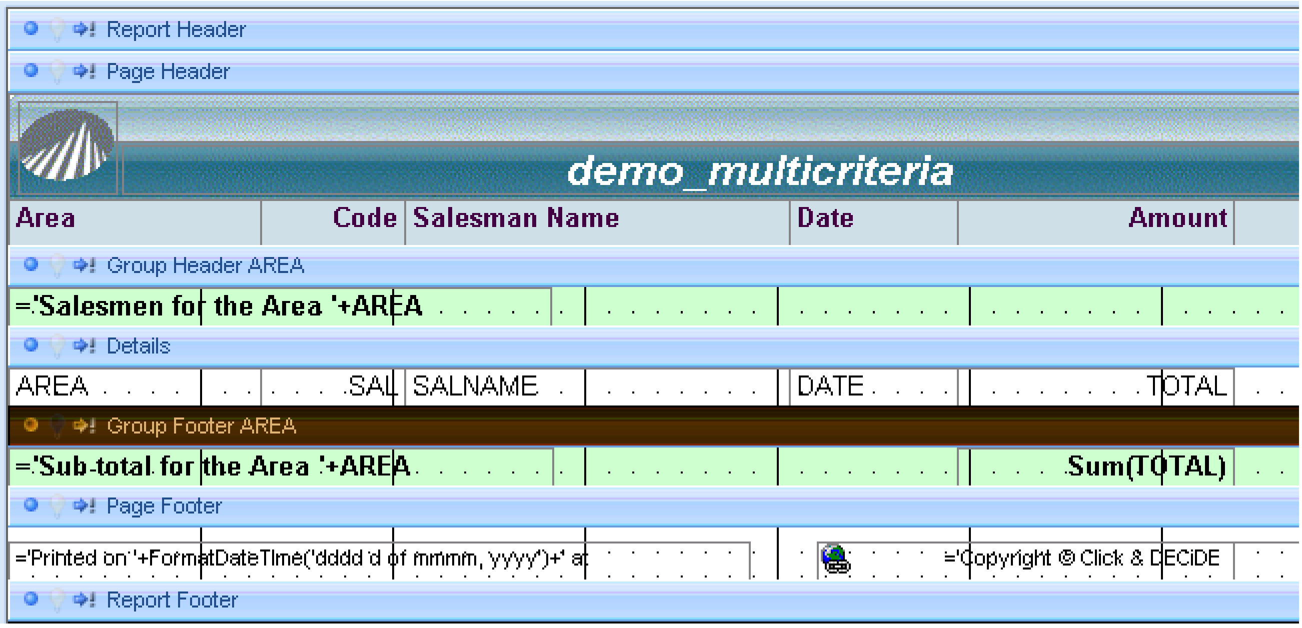
You can also select a background color for the Group Header AREA and the same color for the Group Footer AREA.

You can edit the properties of the AREA field in the Group Footer Area block and modify in the Data Source box in the Data Tab the AREA field into a formula such as 'Sub-total for the area ' + AREA that will appear with the equal sign in the Data Source box ='Sub-total for the area '+AREA.

Warning: be sure to enlarge enough the width of this field to not truncate the result.

You can modify the format of the Sum(TOTAL) field in the Group Footer AREA to customize the numeric format if needed (currency, decimal etc.)

The Report should like as the next picture:



If you run that Report, for the chosen year or period, you will get a detailed list of all the sales done by all the salesmen for each different area. All the areas are in ascending order. Each Group Header AREA will display the title "Salesmen for the area " followed by the area name, and after the Detail Block, the Group Footer AREA will display the text "Sub-total for the area" followed by the area name and the sub-total representing the sum of the TOTAL field for all the salesmen and dates in the list, as in the following example:

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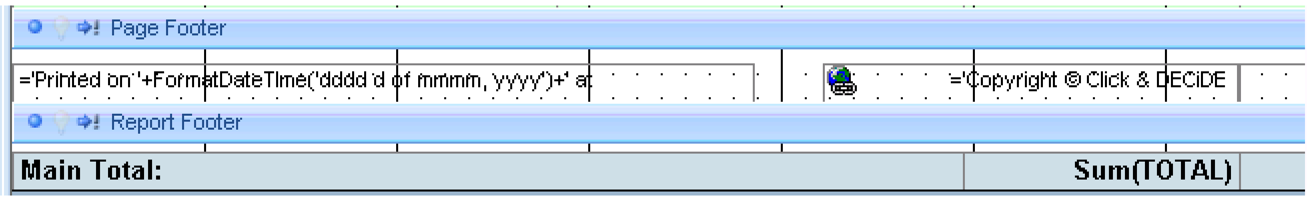
demo_multicriteria

Area	Code	Salesman Name	Date	Amount
Salesmen for the Area ATLANTIC				
ATLANTIC	4	Diane Meyer	1/5/2015	$73,605.00
ATLANTIC	4	Diane Meyer	2/6/2015	$76,953.18
ATLANTIC	4	Diane Meyer	3/16/2015	$79,194.50
ATLANTIC	4	Diane Meyer	3/22/2015	$58,776.00
ATLANTIC	4	Diane Meyer	6/10/2015	$231,969.40
ATLANTIC	4	Diane Meyer	8/12/2015	$77,918.20
ATLANTIC	4	Diane Meyer	9/13/2015	$200,328.20
ATLANTIC	4	Diane Meyer	10/13/2015	$67,712.00
ATLANTIC	12	Karen Walker	2/6/2015	$88,093.74
ATLANTIC	12	Karen Walker	3/22/2015	$70,213.25
ATLANTIC	12	Karen Walker	9/13/2015	$217,865.85
ATLANTIC	18	Tim Rosenberg	10/13/2015	$78,634.00
Sub-total for the Area ATLANTIC				**$1,321,263.31**
Salesmen for the Area CENTRAL				
CENTRAL	5	James Smith	3/30/2015	$97,758.20
CENTRAL	5	James Smith	3/31/2015	$108,314.60

Note that a page break could be done between each area break if we modify the option "Keep together" from “With First Detail” to "Entire group" in the Field Group dialog box. Save the report **Report Training**.

1.8.1. Adding a main total at the end of the Report

If you also wish to get a main total at the end of the report, go back to the Report and increase the size of the **Report Footer Block** by selecting the black line under the block title "Report Footer" and copy again the field Sum(TOTAL) from the Group Footer AREA. You also can add a label text to display a title such as "Main total" using the Aa icon from the Toolbox. The bottom Report should appear like the following picture:



And if you run again the report you will get the main total on last page, after the last Area break:

WEST	15	Ric Smith	12/30/2015	$223,918.15
WEST	15	Ric Smith	12/31/2015	$241,312.29
Sub-total for the Area WEST				**$5,786,463.92**
Main Total:				**$9,248,879.69**

Remark: it could be sometimes necessary to increase the size of the Total field in a Break Group or in the Report Footer Group because the total of all data could give a bigger result that could not feed in the Total field size coming from the Details Block. (the Data could be truncated unless you apply the Can Grow Property, or could be visible but not aligned with the same Total field from other blocks).

1.8.2. Hide the detail block and get only the Break level result

If you only wish to get the Break Level result and hide the Detail Block, click on the Details block and go to the properties dialog box: select **No** in the **Visible** box.

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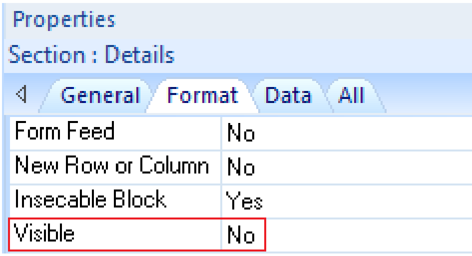
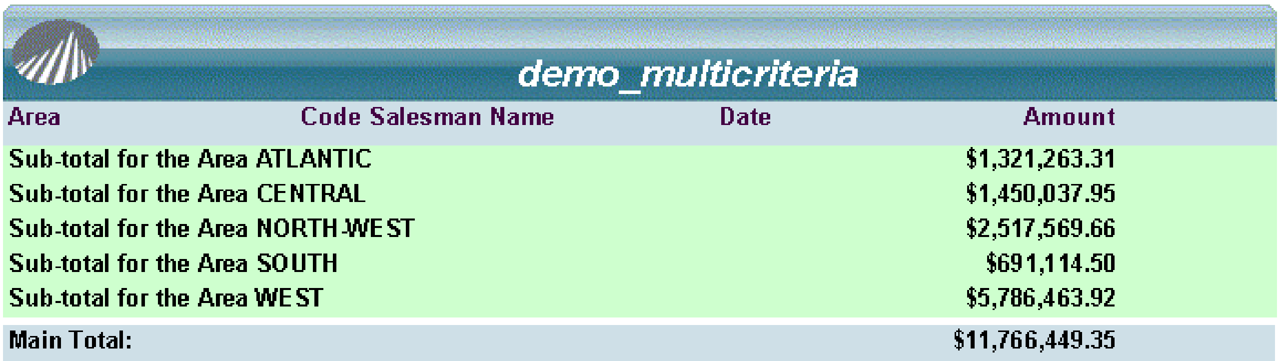
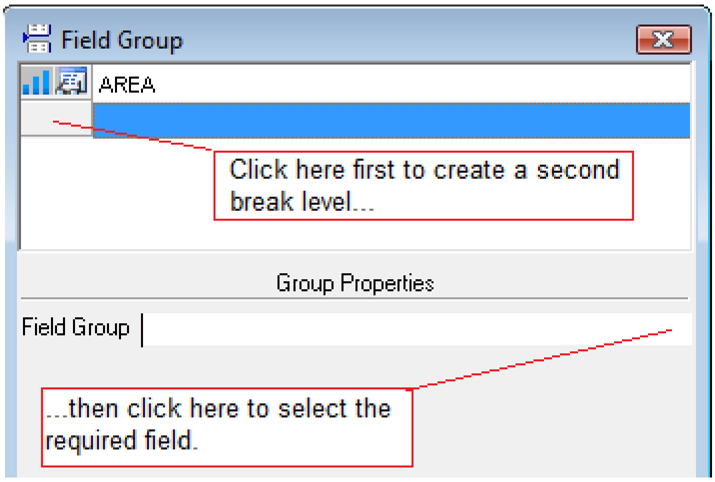


Do the same for the Group Header AREA to hide that block, to avoid to get twice the information about the Area in the Group Header and Group Footer. In the Page Header Block, you can also hide the heading Code, Salesman Name and Date to not display this text in the condensed mode because no salesman neither date will be display. Run the Report to screen. The result should be something like the next picture if you have formatted all the numeric fields for a currency for example:



1.8.3. Adding a second break level

Go back to the previous situation, with the Group Header AREA and the Detail blocks visible, and also the heading Code, Salesman Name and Date visible in the Page Header block. To add another break level, inside of each area, go back to the Field Group dialog box using the icon:



In the previous example, we will add a second break level on the SALESMAN name:

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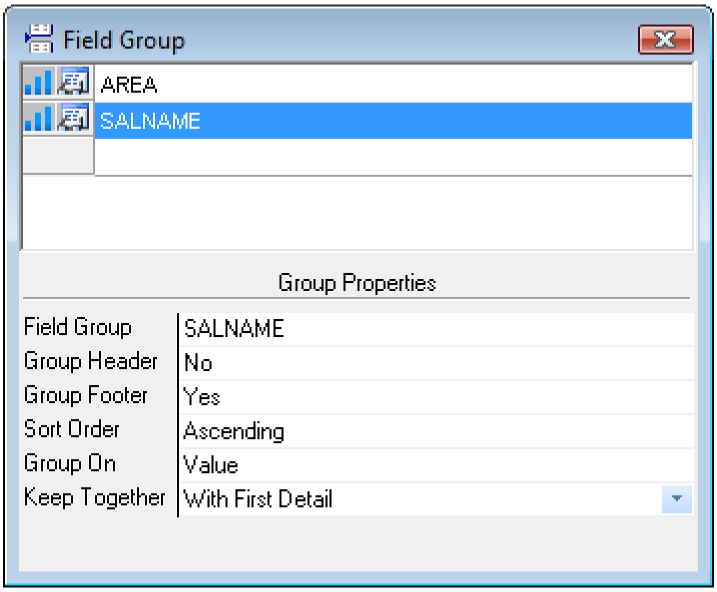
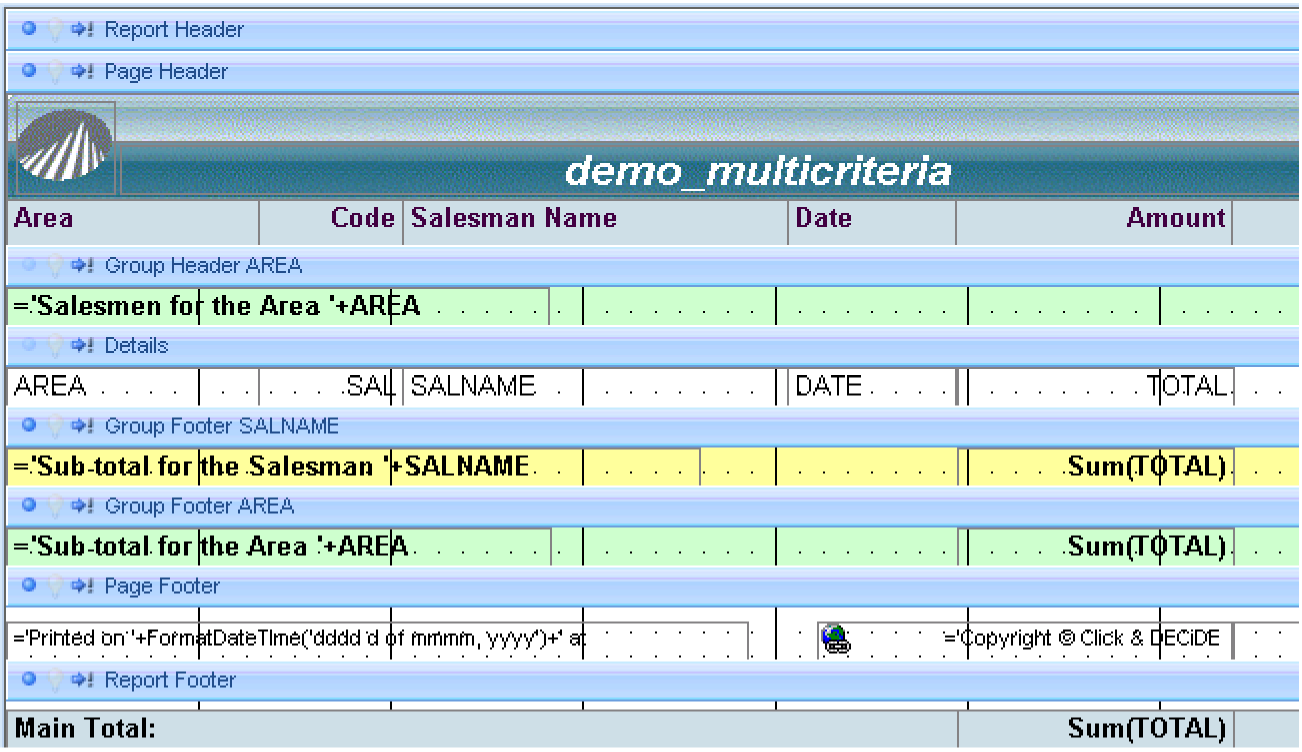


In the above Break level 2 for the salesman name, the Group Header is not required but the Group Footer is required to display the sum of the TOTAL field when the break will occur for each salesman. The option Keep Together is set to "With first detail", so a page break will be done only if no detail can be inserted before the page bottom. You can now modify the report to give another color to the Group Footer SALNAME and modify the SALNAME field with a formula such as ='Sub-total for the salesman '+SALNAME. The Report should appear like the next picture:



If you run that report, the beginning will be the same as before, with the title for the Break level 1 for each area (in green in our example), then the detailed list of the sales for the first salesman.

Then, after the first salesman and before the next salesman (in the same area), the report will produce a break level 2 for the total of the current salesman (in yellow in our example).

If more salesmen exist for the same area, we get the detailed list for the next salesman and then the report will display another break level 2 for the total of the next salesman (in yellow in our example) and will display after that a break level 1 to give the sum of total for the area (in green in our example), because the next record will concern another area:

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demo_multicriteria

Area	Code	Salesman Name	Date	Amount
Salesmen for the Area ATLANTIC				
ATLANTIC	4	Diane Meyer	1/5/2015	$73,605.00
ATLANTIC	4	Diane Meyer	2/6/2015	$76,953.18
ATLANTIC	4	Diane Meyer	3/16/2015	$79,194.50
ATLANTIC	4	Diane Meyer	3/22/2015	$58,776.00
ATLANTIC	4	Diane Meyer	6/10/2015	$231,969.40
ATLANTIC	4	Diane Meyer	8/12/2015	$77,918.20
ATLANTIC	4	Diane Meyer	9/13/2015	$200,328.20
ATLANTIC	4	Diane Meyer	10/13/2015	$67,712.00
Sub-total for the Salesman Diane Meyer				**$866,456.47**
ATLANTIC	12	Karen Walker	2/6/2015	$88,093.74
ATLANTIC	12	Karen Walker	3/22/2015	$70,213.25
ATLANTIC	12	Karen Walker	9/13/2015	$217,865.85
Sub-total for the Salesman Karen Walker				**$376,172.84**
ATLANTIC	18	Tim Rosenberg	10/13/2015	$78,634.00
Sub-total for the Salesman Tim Rosenberg				**$78,634.00**
Sub-total for the Area ATLANTIC				**$1,321,263.31**

Important note: in the above example, the Group Header Area is only display the first time when starting a new area level. But that information is not repeated on next page until the area change.

You can force that option to repeat the Group Header Area on each page by selecting **Yes** in the **Section Repeat** box in the Group Header Area properties (Format Tab).

Properties

Section : Group Header AREA

General | Format | Data | All

Form Feed	No
New Row or Column	No
Insecable Block	Yes
Visible	Yes
Width	7.28"
Height	0.2"
Can Grow	Yes
Can Shrink	No
Repeat Section	Yes

You can now again ask for no detail, hiding the Details Block and get a condensed result for the 2 break levels thus defined and the main total:

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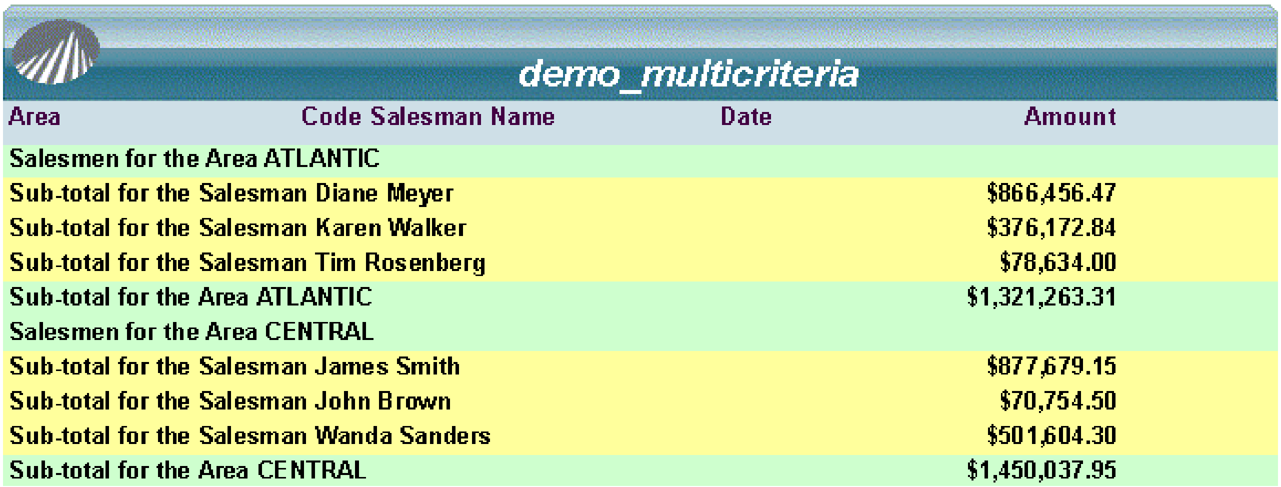


demo_multicriteria			
Area	Code Salesman Name	Date	Amount
Salesmen for the Area ATLANTIC			
Sub-total for the Salesman Diane Meyer			$866,456.47
Sub-total for the Salesman Karen Walker			$376,172.84
Sub-total for the Salesman Tim Rosenberg			$78,634.00
Sub-total for the Area ATLANTIC			$1,321,263.31
Salesmen for the Area CENTRAL			
Sub-total for the Salesman James Smith			$877,679.15
Sub-total for the Salesman John Brown			$70,754.50
Sub-total for the Salesman Wanda Sanders			$501,604.30
Sub-total for the Area CENTRAL			$1,450,037.95

You can add other breaks levels using the same way as describe in this chapter.

1.8.4. Sending a report with break to Excel

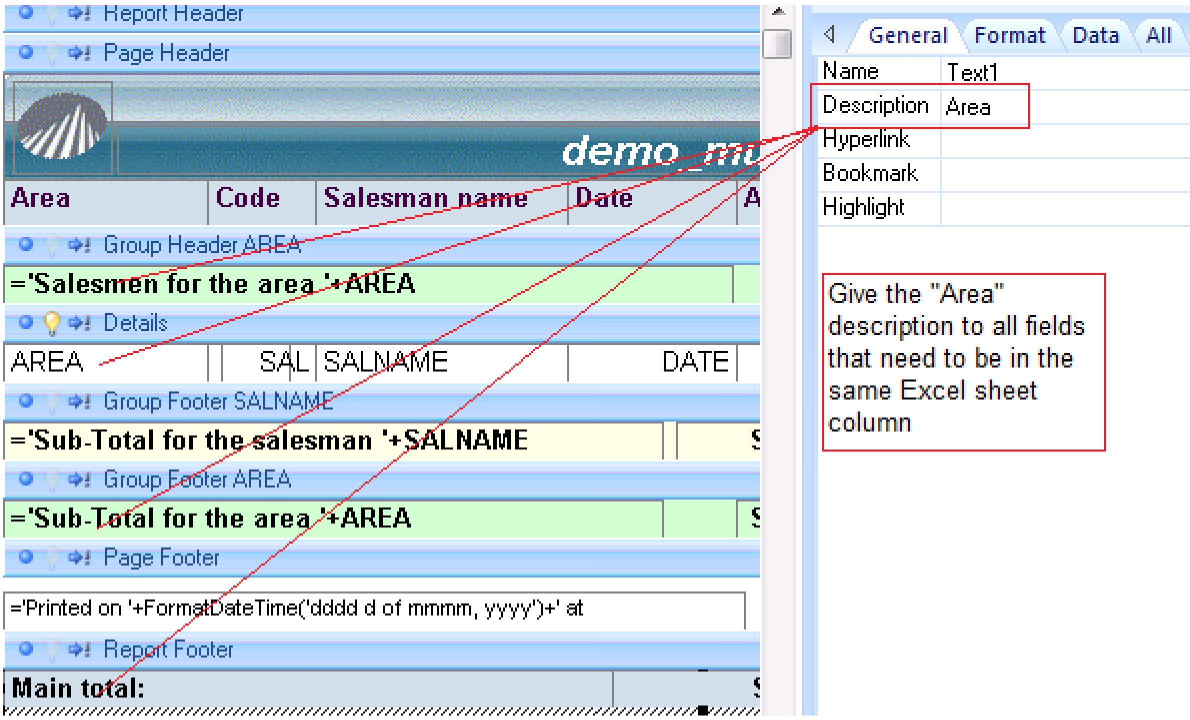
When sending a report to Excel, Click&DECiDE Builder only sends the Details and Break blocks fields. The other report blocks such as Report Header, Page Header, Page Footer and Report Footer are ignored.

In order to define a column header inside the target Excel Sheet, Click&DECiDE Builder uses the Description box content from each Details Block field. If the Description is empty, then the program uses the internal object Name, that cannot contain spaces neither special characters and cannot be used twice with the same name in a report. We strongly recommend thus to use the Description box to define such headers.

The problem when sending a report to Excel is that all data fields from the Details Block and the various Break Header or Break Footer Blocks are not always aligned vertically. The solution provided by Click&DECiDE Builder is given if you take care about the following rule:

"***Each data field sent to Excel and having the same Description content will be sent in the same Excel sheet column***".

In our report example with the 2 break levels, on Area and Salesman, we will enter in the Description box the word **Area** for all columns that should be in the same Excel sheet column:



Then we will apply the same rule for the Salesman Name column.

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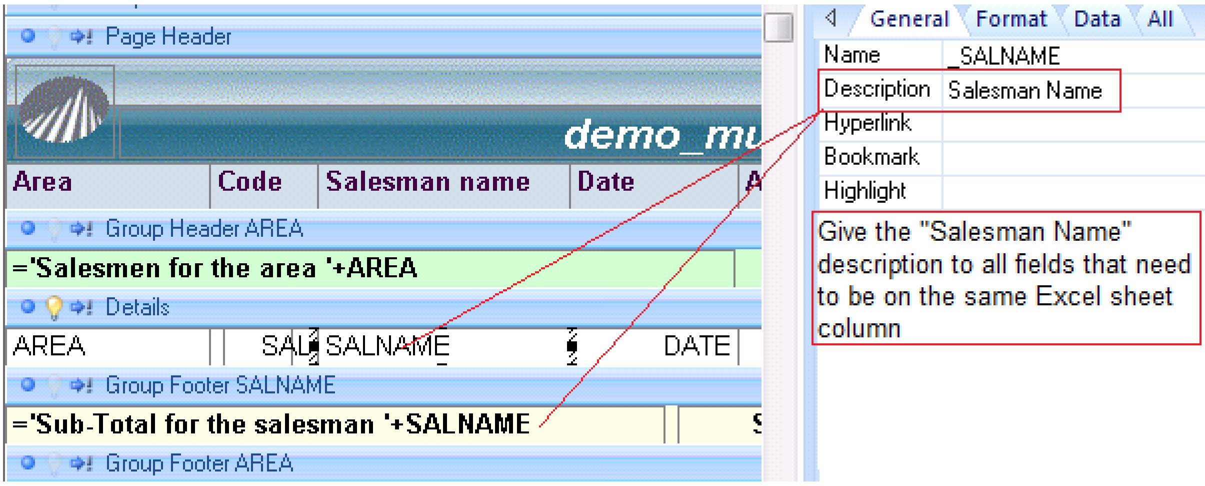

And then the same rule for the Total and Sum(Total) fields that will receive the same Description, for example the word “Amount”. Export this report to Excel or Excel 2007, in Sheet1 and cell A1 for example and open the Excel result file:

If you click on the **first** left level (number 1) you only see condensed data corresponding to the Main Total level:

1 2 3 4		A	B	C	D	E
	1	Area	Code	Salesman Name	Date	Amount
+	238	Main Total:				$30,322,200.00
	239					

Note the Column Headers in Excel corresponding to the Description defined in the Click&DECiDE Report.

If you click on the **second** left level (number 2) you only see condensed data corresponding to the Main Total and the First Break level (Area):

1 2 3 4		A	B	C	D	E
	1	Area	Code	Salesman Name	Date	Amount
·	2	ATLANTIC				
+	36	Sub-total for the area ATLANTIC				$3,624,900.00
·	37	CENTRAL				
+	110	Sub-total for the area CENTRAL				$10,590,800.00
·	111	NORTH-WEST				
+	150	Sub-total for the area NORTH-WEST				$5,119,970.00
·	151	SOUTH				
+	204	Sub-total for the area SOUTH				$7,305,670.00
·	205	WEST				
+	237	Sub-total for the area WEST				$3,680,890.00
−	238	Main Total:				$30,322,200.00

If you click on the **third** left level (number 3) you only see condensed data corresponding to the Main Total, the First Break level (Area) level and the Second Break level (Salesman):

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	A	B	C	D	E
1	Area	Code	Salesman Name	Date	Amount
2	ATLANTIC				
17			Sub-total for the salesman Diane Meyer		$1,736,300.00
23			Sub-total for the salesman Karen Walker		$576,214.00
35			Sub-total for the salesman Tim Rosenberg		$1,312,380.00
36	Sub-total for the area ATLANTIC				$3,624,900.00
37	CENTRAL				
69			Sub-total for the salesman James Smith		$5,021,310.00
86			Sub-total for the salesman John Brown		$2,908,250.00
99			Sub-total for the salesman Kathy Sanders		$1,268,590.00
109			Sub-total for the salesman Sanders Wanda		$1,392,670.00
110	Sub-total for the area CENTRAL				$10,590,800.00

If you click on the **fourth** left level (number 4) you see all detailed data corresponding to all detailed and break levels:

	A	B	C	D	E
1	Area	Code	Salesman Name	Date	Amount
2	ATLANTIC				
3		4	Diane Meyer	12/24/2015	$197,882.00
4	ATLANTIC	4	Diane Meyer	12/24/2015	$200,115.00
5	ATLANTIC	4	Diane Meyer	1/30/2015	$158,318.00
6	ATLANTIC	4	Diane Meyer	3/22/2015	$58,776.00
7	ATLANTIC	4	Diane Meyer	8/22/2015	$69,826.30
8	ATLANTIC	4	Diane Meyer	12/28/2015	$78,221.30
9	ATLANTIC	4	Diane Meyer	12/24/2015	$184,135.00
10	ATLANTIC	4	Diane Meyer	12/24/2015	$186,528.00
11	ATLANTIC	4	Diane Meyer	1/4/2015	$94,029.60
12	ATLANTIC	4	Diane Meyer	1/6/2015	$144,840.00
13	ATLANTIC	4	Diane Meyer	2/6/2015	$88,093.70
14	ATLANTIC	4	Diane Meyer	3/22/2015	$70,213.30
15	ATLANTIC	4	Diane Meyer	9/29/2015	$116,745.00
16	ATLANTIC	4	Diane Meyer	12/28/2015	$88,578.80
17			Sub-total for the salesman Diane Meyer		$1,736,300.00

1.9. Adding a Graph

Using our report example **Report Training** with break levels on Area and Salesman Name, we will add a **Graph** on the Group Footer Block for each Area, in order to display a Pie or Histogram for all salesmen belonging to the same area.

1. To do so, enlarge vertically the Group Footer AREA Block and click on the Chart icon in the Toolbox, then define the target location of the graph in the Group Footer AREA:

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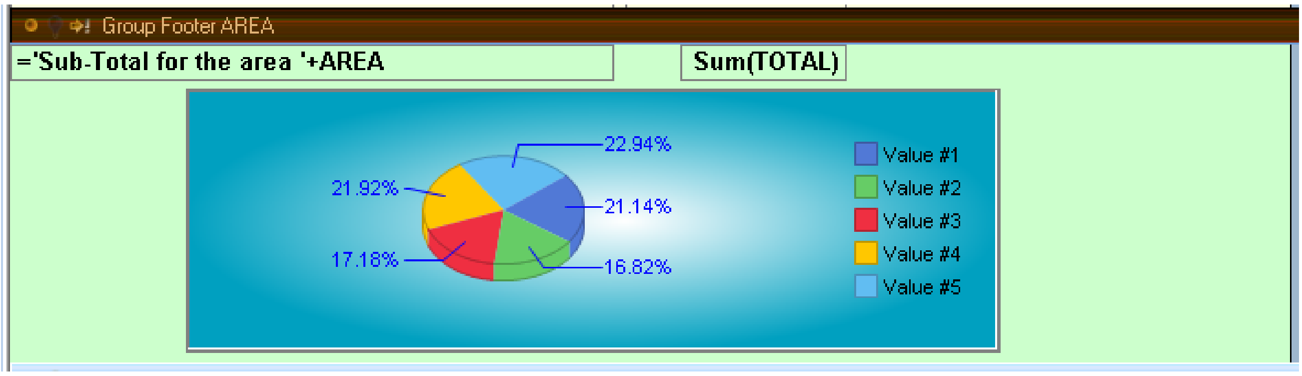
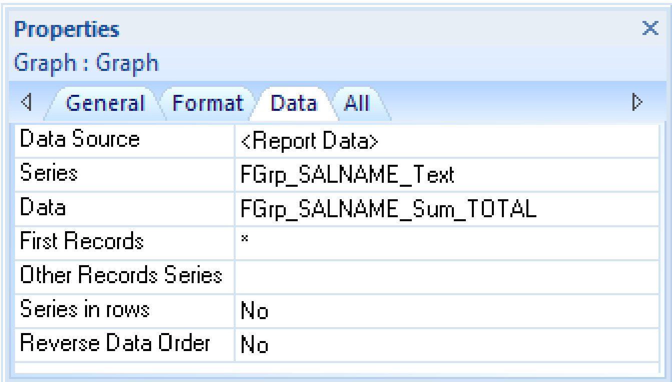
2. Select for example the Pie 3D model in the proposed list and click **OK**. The report should be as follow for the Group Footer AREA: (Use the Click and DECiDE Chart Designer to modify the Graph Design).



3. Now, select the graph and open the Property Data Tab:



By default <Report Data> is proposed as Data Source. This choice avoids to run again a query to feed the graph. The graph can use the existing report data and save resources when building the report.

4. Specify the Series and Data fields. In this example the Series will be the **FGrp_SALNAME_Text** field taken in the Group Footer Block for the SALNAME break level and the data will be the SUM(TOTAL) field taken from the Salesman Break Level. As you can see in the above picture the internal name of this field has been created automatically as "**FGrp_SALNAME_Sum_TOTAL**". Of course you can rename this internal name if needed.

5. Run the report and you will get a Pie Chart on each Area break level, displaying the Salesman belonging to the same area.

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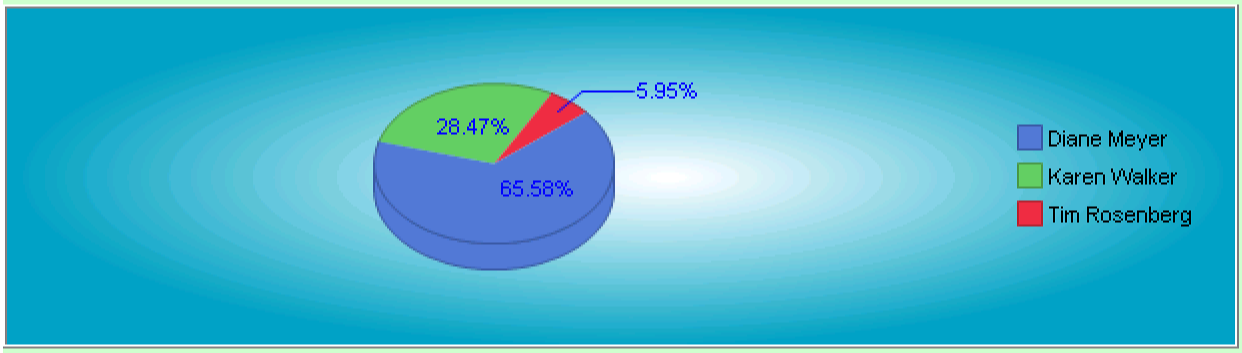
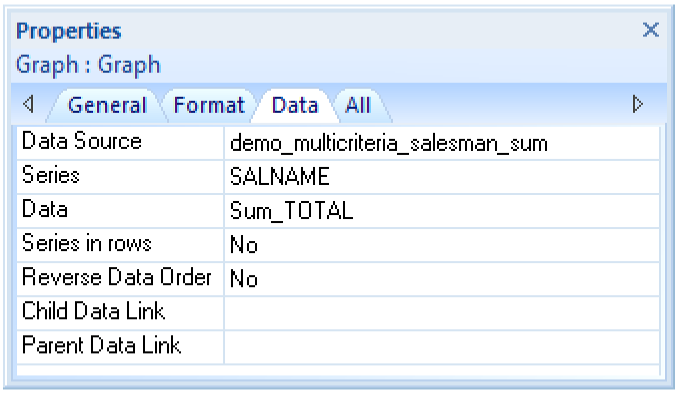
ATLANTIC	4 Diane Meyer	9/13/2015	$200,328.20
ATLANTIC	4 Diane Meyer	10/13/2015	$67,712.00
Sub-total for the Salesman Diane Meyer			**$866,456.47**
ATLANTIC	12 Karen Walker	2/6/2015	$88,093.74
ATLANTIC	12 Karen Walker	3/22/2015	$70,213.25
ATLANTIC	12 Karen Walker	9/13/2015	$217,865.85
Sub-total for the Salesman Karen Walker			**$376,172.84**
ATLANTIC	18 Tim Rosenberg	10/13/2015	$78,634.00
Sub-total for the Salesman Tim Rosenberg			**$78,634.00**
Sub-total for the Area ATLANTIC			**$1,321,263.31**



When a Graph inside a report can use the Report Data, it is recommended to use that way. If it is not possible and you need to run a separate query, the Property Data Tab looks a little bit different: if we replace <Report Data> with a query name such a query giving the SUM of the TOTAL field by Salesman and by Area, we have to define the Data Tab as follow:


Properties
Graph : Graph
General | Format | Data | All

Data Source	demo_multicriteria_salesman_sum
Series	SALNAME
Data	Sum_TOTAL
Series in rows	No
Reverse Data Order	No
Child Data Link	
Parent Data Link	

In the above picture the Series is the SALNAME field and the Data is the Sum_TOTAL field from the query named “demo_multicriteria_salesman_sum”. This query, run separately, will give for example this result:

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Area	Salesman Name	Sum_TOTAL
ATLANTIC	Diane Meyer	866456.47
ATLANTIC	Karen Walker	376172.84
ATLANTIC	Tim Rosenberg	78634.00
CENTRAL	James Smith	877679.15
CENTRAL	John Brown	70754.50
CENTRAL	Wanda Sanders	501604.30
NORTH-WEST	Bill Raley	586901.80
NORTH-WEST	Joe Kramer	1145743.10
NORTH-WEST	Robert Salta	330074.50
NORTH-WEST	Sandra Davis	454850.26
SOUTH	Jean Martin	221698.60
SOUTH	Jim Baxter	336686.40
SOUTH	Kim Johnson	132729.50
WEST	Doug Castro	2057604.94
WEST	Georges Dunel	1058487.55
WEST	Ric Smith	2670371.44

So, in the above Graph Properties, it is necessary to add a condition between the **Child Data Link** and the **Parent Data Link**, specifying which columns have to be used as **additional criteria**.

In our example, the additional criteria will be the AREA field:

Properties
Graph : Graph
General | Format | Data | All

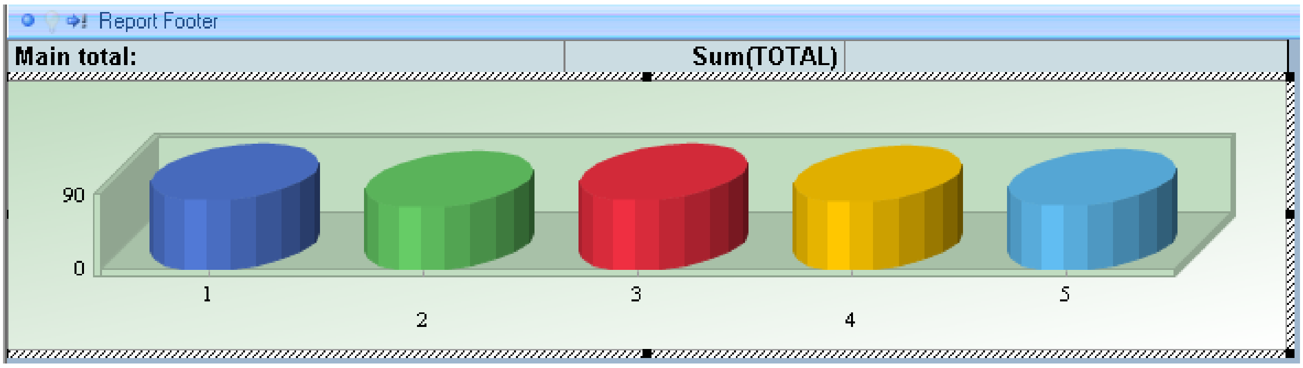
Data Source	demo_multicriteria_salesman_sum
Series	SALNAME
Data	Sum_TOTAL
Series in rows	No
Reverse Data Order	No
Child Data Link	AREA
Parent Data Link	AREA

So, only the records belonging to the same AREA will feed the Graph on each Area Break Level. If you forget the Child and Parent Data Links, all records from the query source will be used in each Area Break Level, giving a wrong result.

But remember that a separate query will take more resources and time when running the report and we recommend using the <Report Data> each time it is possible.

On the same way, we can easily add another Graph in the last Report Footer Block to compare the result for all the Area Blocks.

1. Repeat the same operation by selecting for example a 3D-Vertical Bar Chart in the last report block. The Report Block Footer should be as this example:



And the Property Data Tab as follow:

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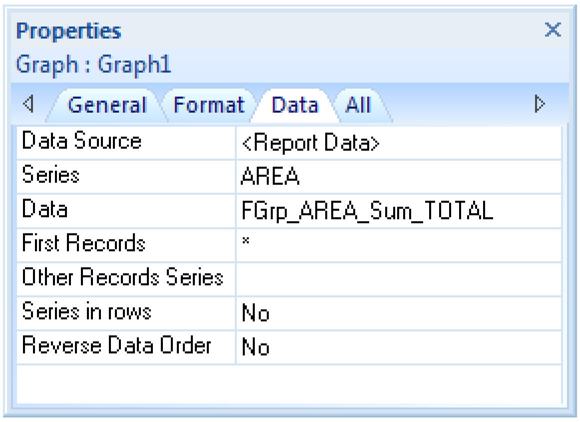
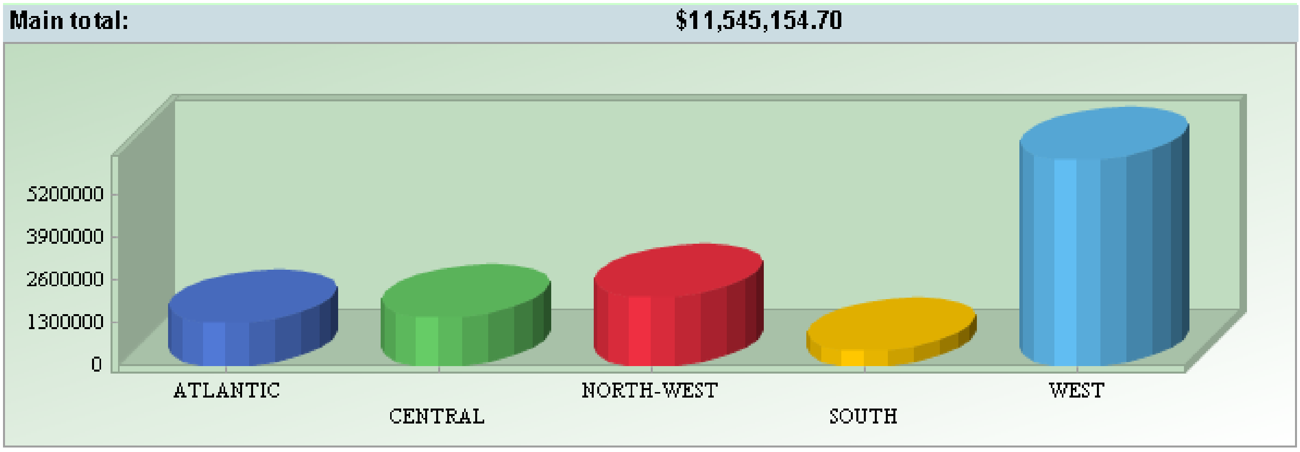


With the AREA field as Series and the "FGrp_AREA_Sum_TOTAL" field as Data, this field being the Sum(TOTAL) in the Area Break Level.

2. Run the report and the last block should be as this example:

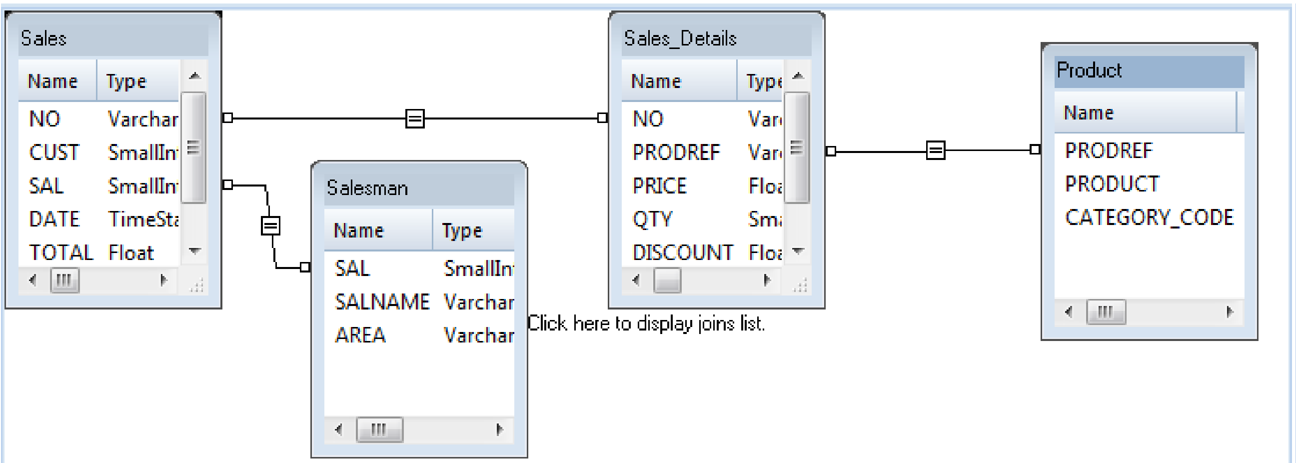


1.10. Adding a Sub-Report

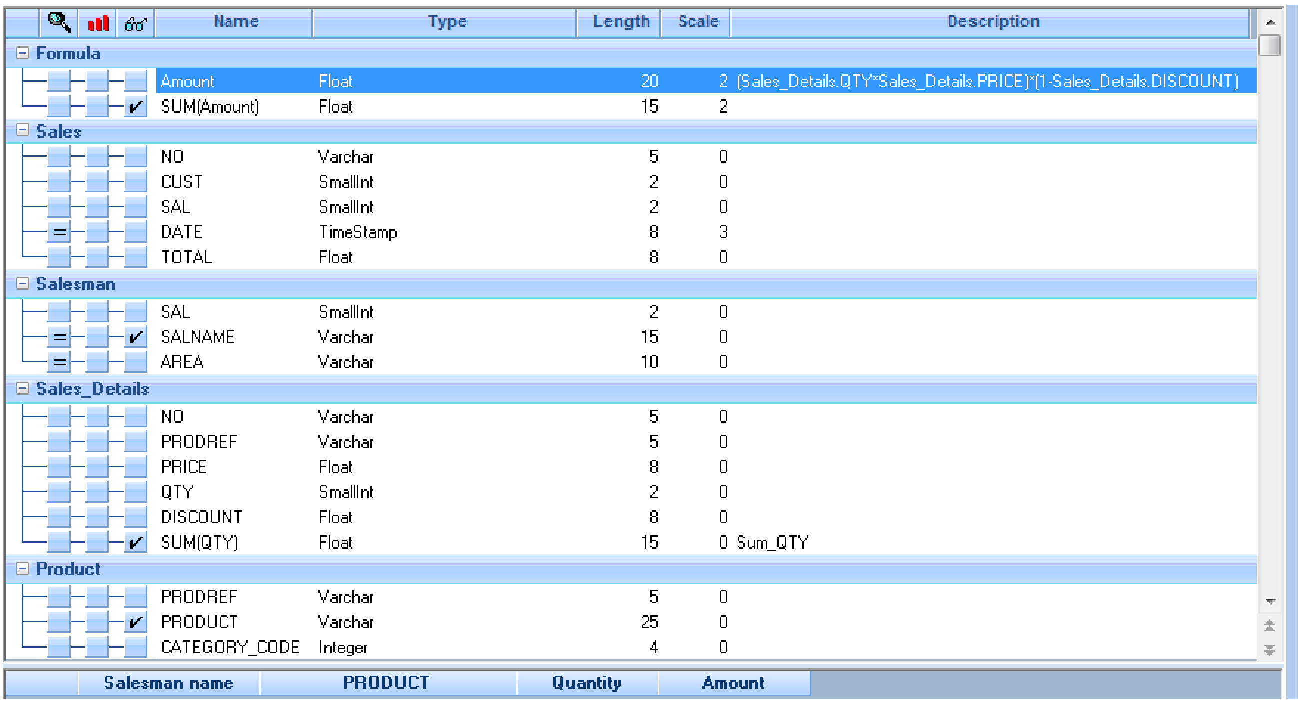
Using our report example **Report Training** with break levels on Area and Salesman Name, we will add a **Sub-report** on the Group Footer Block for each Salesman, in order to display information about the products sold.

We need first to create a new query, using the same parameters, but retrieving information about the products sold for the salesmen, then create a report that will be used as a sub-report.

1. Make a copy of the "demo_multicriteria" query under a new name "demo_multicriteria_product".
2. Open this new query, select the **Table Tab** and add the 2 tables Sales_Details and Product as follow:

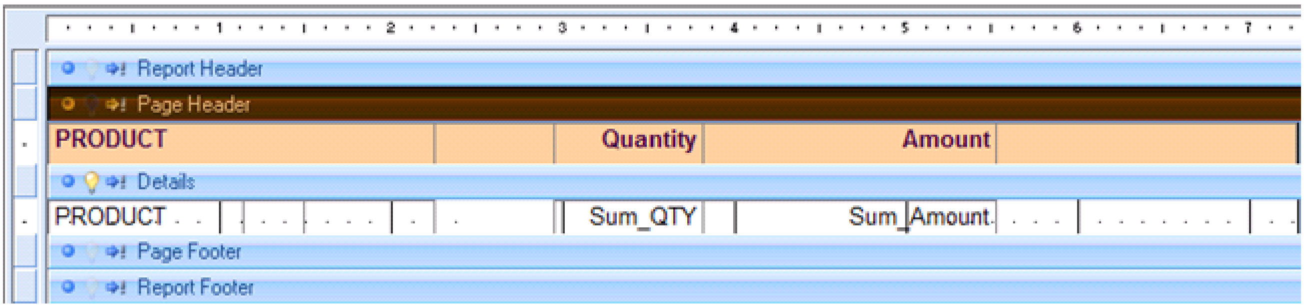


3. Go back to the Query Tab and select only the required fields: Salesman Name, Product, Quantity and Amount, using a virtual field calculating the amount as follow: (Sales_Details.QTY*Sales_Details.PRICE)*(1-Sales_Details.DISCOUNT), then applying a SUM on both numeric fields:

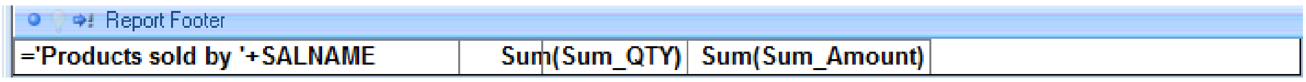


4. Save the query and create a new report using another color model

In the new report, arrange the items as follow to keep only the Labels in the Page Header, the Product, the Sum(QTY) and Sum(AmountTOTAL) in the Detail Block. **Note**: Use the same left position and size for the Amount field as the one used in the main report for the Sum(TOTAL) field to get them vertically align. Remove the Page Footer items and reduce its size to zero:



5. Add now a main total for both Quantity and Amount in the Report Footer, by copying the 2 numeric fields in the Report Footer Block and applying a SUM to both fields, and adding a new calculated field with the formula ***='Products sold by '+SALNAME*** to get the Salesman name for each sub-total:



In the Report Footer, edit the properties of the Sum(Sum_Amount) field and change the internal name to _Sum_Amount_Total for example (this field will be used later in the Alert Chapter):

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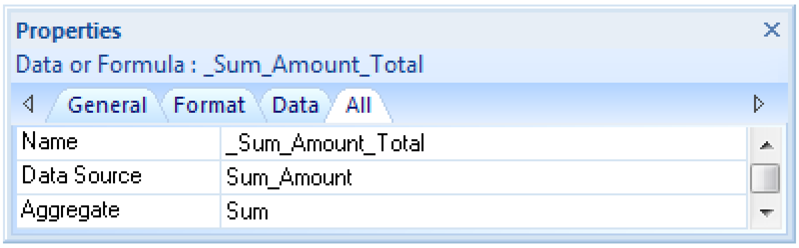
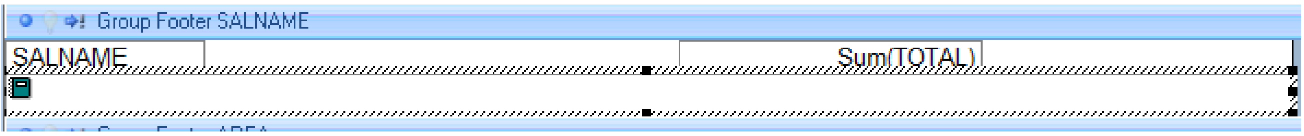


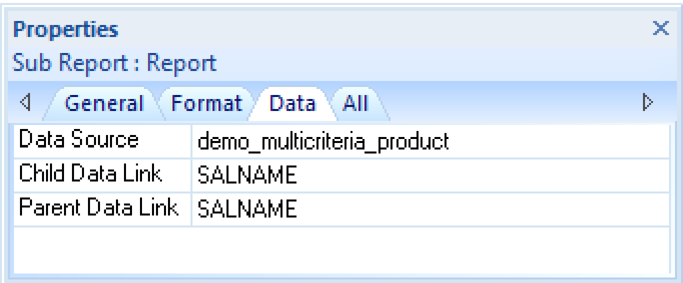
6. Save now the new report as for example “demo_multicriteria_product”
7. Test this report using only one salesman for year 2015 for example; you should get something like:

PRODUCT	Quantity	Amount
2009 RED ZONE	51	$78,633.50
BMX ADULT RACER	55	$43,780.00
BMX URBAN LEAGUE	49	$110,250.00
DELTA HORSE DUAL	5	$5,525.00
MONGOOSE MOUNTAIN CRUISE	38	$71,739.73
NINE ALLIANCE RACER	152	$306,850.00
NIVRE SPECIAL EDITION	44	$35,805.00
SHOREWOODS WOMENS	16	$13,536.00
Products sold by John Brown	**410**	**$666,119.22**

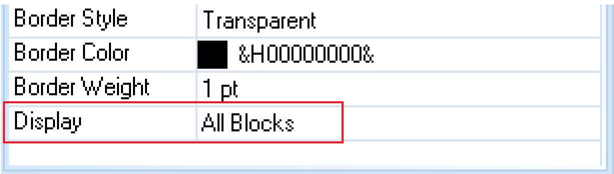
8. Now, go back to the main report, in which we want to add this report as a sub-report.
9. To do so, enlarge vertically the Group Footer SALNAME Block and click on the Sub-report icon in the Toolbox, then define the target location of the sub-report in the Group Footer SALNAME:



10. Open the property dialog box for this sub-report object and select as data source the new sub-report “demo_multicriteria_product previously created and add a link between the SALNAME fields in the Child Data Link and Parent Data Link to be sure to run this sub-report only for the current Salesman at the break level time:



11. In the Format Tab change the default Display option “Detail and Break” to “All Blocks”



12. Make sure the option **Can Grow** in the Format Tab is set to **Yes** for both Group Footer SALNAME Block and Sub-Report object:

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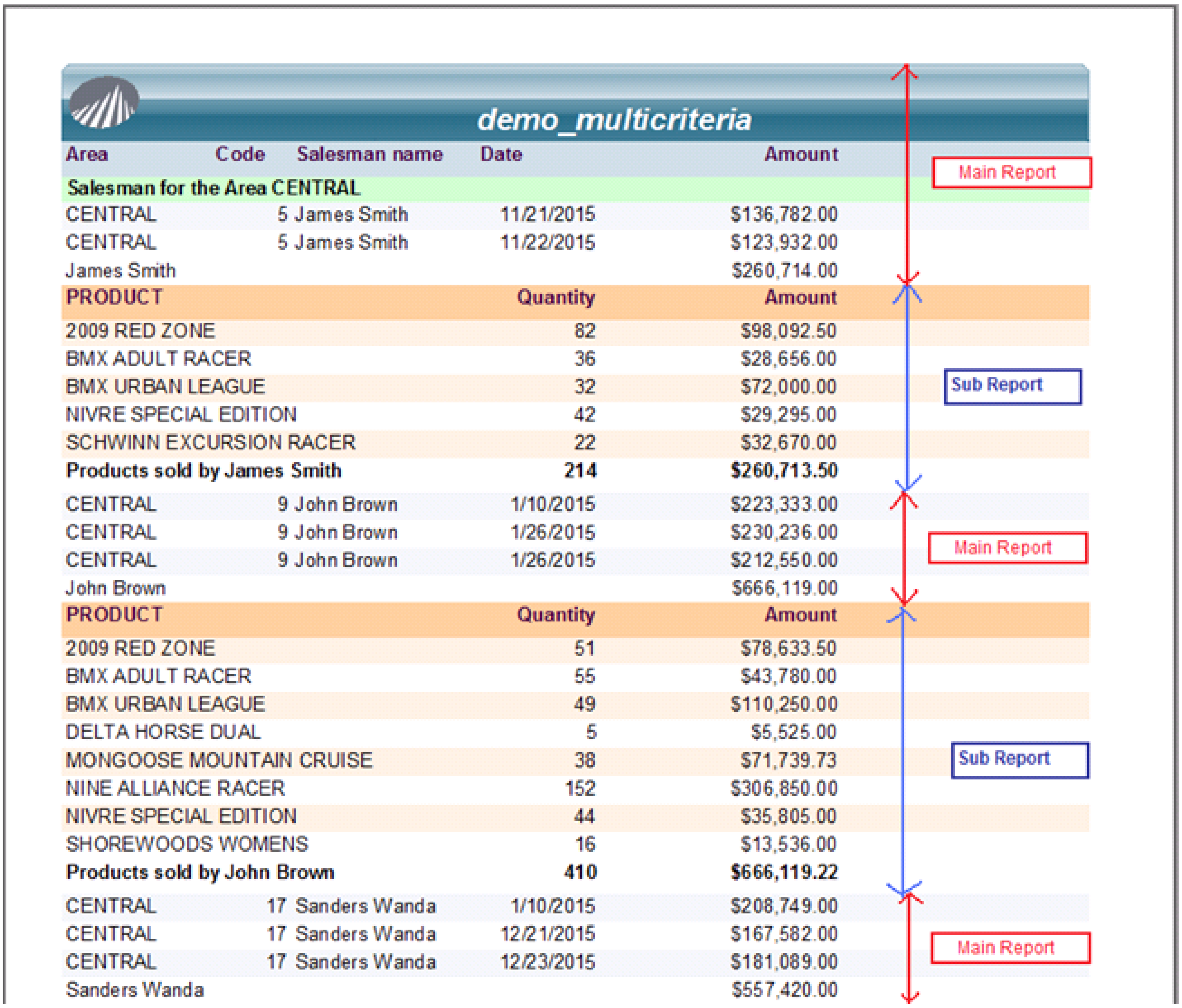
Can Grow	Yes
Can Shrink	No

13. Save and run now the **Report Training** report selecting area and/or period. See the result.



demo_multicriteria

Area	Code	Salesman name	Date	Amount
Salesman for the Area CENTRAL				
CENTRAL	5	James Smith	11/21/2015	$136,782.00
CENTRAL	5	James Smith	11/22/2015	$123,932.00
James Smith				$260,714.00

PRODUCT	Quantity	Amount
2009 RED ZONE	82	$98,092.50
BMX ADULT RACER	36	$28,656.00
BMX URBAN LEAGUE	32	$72,000.00
NIVRE SPECIAL EDITION	42	$29,295.00
SCHWINN EXCURSION RACER	22	$32,670.00
Products sold by James Smith	**214**	**$260,713.50**

CENTRAL	9	John Brown	1/10/2015	$223,333.00
CENTRAL	9	John Brown	1/26/2015	$230,236.00
CENTRAL	9	John Brown	1/26/2015	$212,550.00
John Brown				$666,119.00

PRODUCT	Quantity	Amount
2009 RED ZONE	51	$78,633.50
BMX ADULT RACER	55	$43,780.00
BMX URBAN LEAGUE	49	$110,250.00
DELTA HORSE DUAL	5	$5,525.00
MONGOOSE MOUNTAIN CRUISE	38	$71,739.73
NINE ALLIANCE RACER	152	$306,850.00
NIVRE SPECIAL EDITION	44	$35,805.00
SHOREWOODS WOMENS	16	$13,536.00
Products sold by John Brown	**410**	**$666,119.22**

CENTRAL	17	Sanders Wanda	1/10/2015	$208,749.00
CENTRAL	17	Sanders Wanda	12/21/2015	$167,582.00
CENTRAL	17	Sanders Wanda	12/23/2015	$181,089.00
Sanders Wanda				$557,420.00

When the report is run, the sub-report is run with additional criteria "where Salesman from the sub-report is equal to the current Salesman from the main report in the SALNAME Break level".

1.11. Adding a Cross-table

Using our report example **Report Training** with break levels on Area and Salesman Name, we will add a **Cross-table** in the Group Footer Block for each AREA, in order to display for example the customers found for each AREA according to the selected Salesmen and/or the specified period.

To do so, make a copy of the "demo_multicriteria" query and add the Customer Table, linked to the Sales table with the "Cust" field. Then save this query as "demo_multicriteria_area_customer".

This query should look like:

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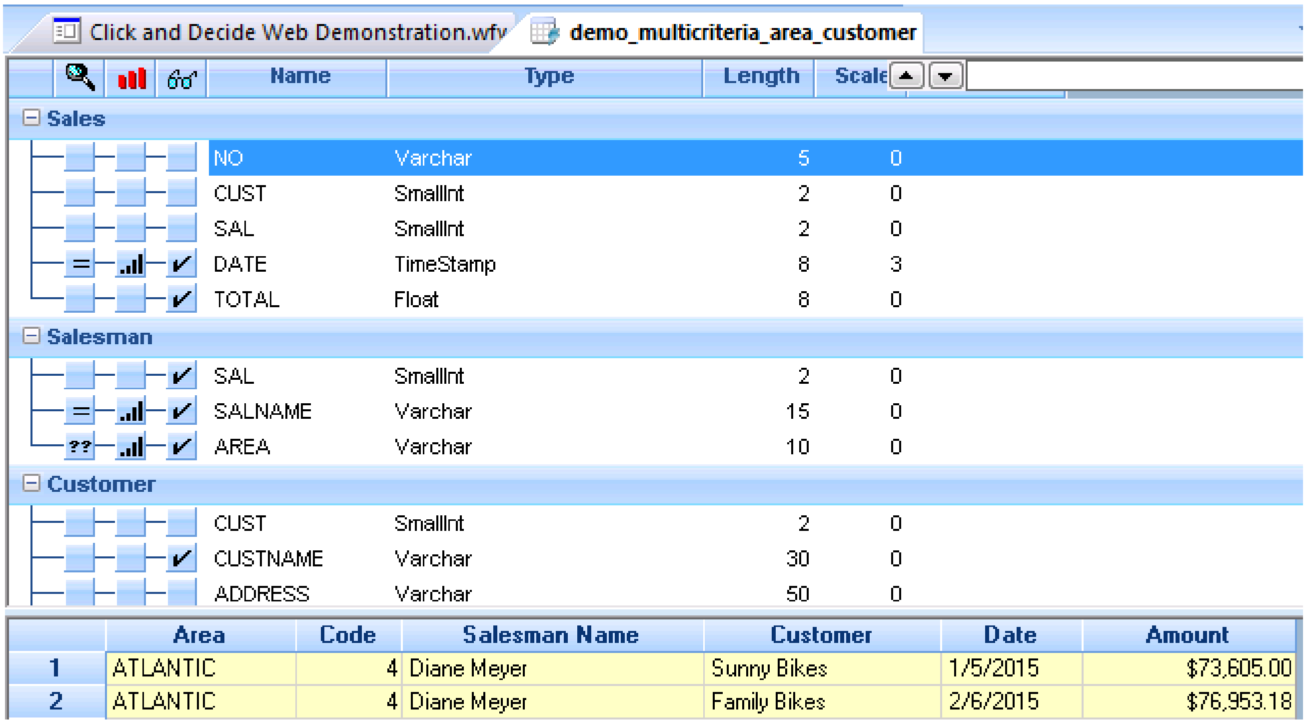
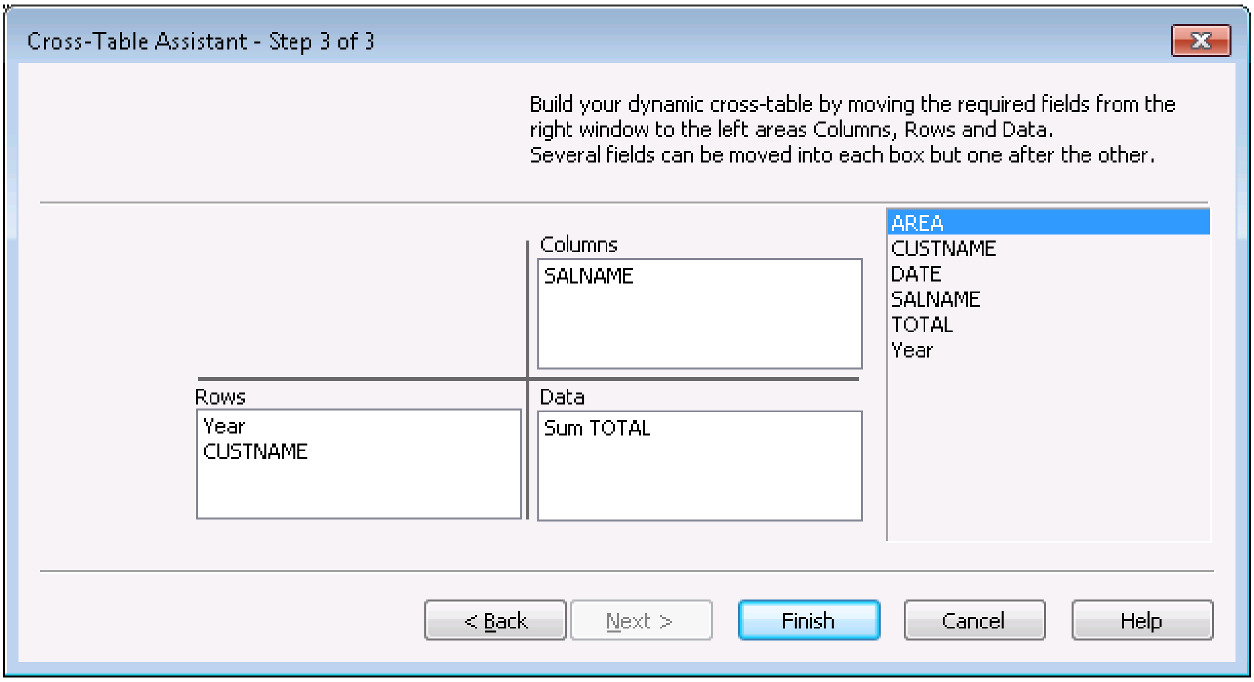
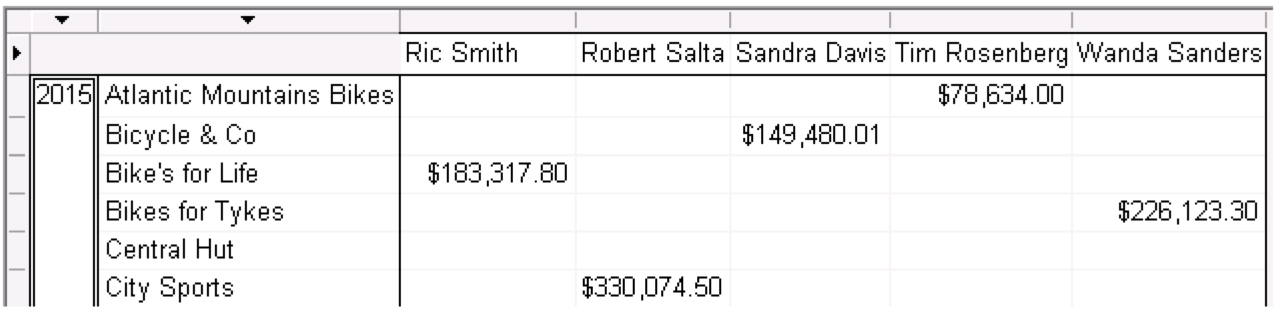


Now create a Cross-table displaying the Customer for each Area and Salesman, for the selected Year. The cross-table should look like:



And the result should looks like:



		Ric Smith	Robert Salta	Sandra Davis	Tim Rosenberg	Wanda Sanders
2015	Atlantic Mountains Bikes				$78,634.00	
	Bicycle & Co			$149,480.01		
	Bike's for Life	$183,317.80				
	Bikes for Tykes					$226,123.30
	Central Hut					
	City Sports		$330,074.50			

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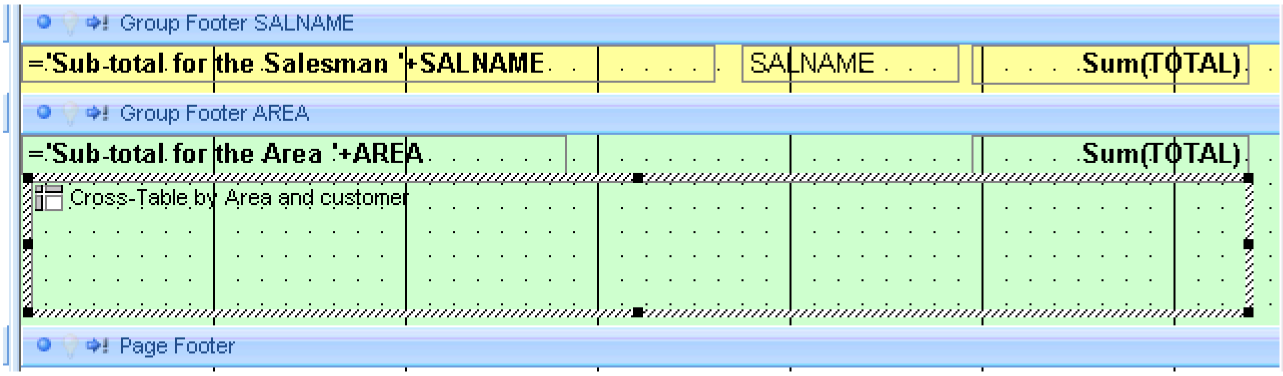
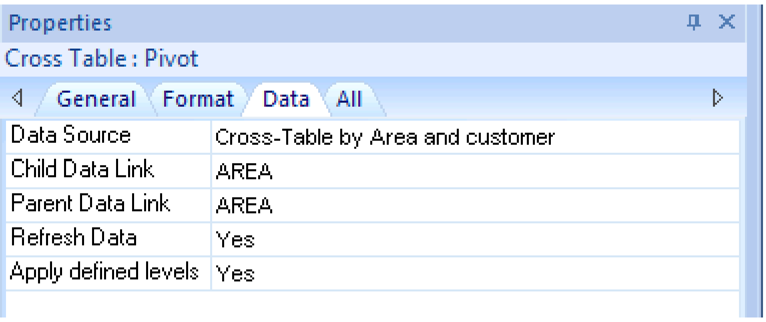
Save it as "Cross-Table by Area and customer" and now, in the **Report Training**, add a cross-table object in the Group Footer for the Area field:



Select the "Cross-Table by Area and customer" as data source and add a Child Data Link and a Parent Data Link using the AREA field:



Set "Refresh Data" to "Yes" and "Apply defined levels" to Yes. Save and run the report for the current year for example:

Area	Code	Salesman Name	Date	Amount
Salesmen for the Area ATLANTIC				
ATLANTIC	4	Diane Meyer	1/5/2015	$73,605.00
ATLANTIC	4	Diane Meyer	2/6/2015	$76,953.18
ATLANTIC	4	Diane Meyer	3/16/2015	$79,194.50
ATLANTIC	4	Diane Meyer	3/22/2015	$58,776.00
ATLANTIC	4	Diane Meyer	6/10/2015	$231,969.40
ATLANTIC	4	Diane Meyer	8/12/2015	$77,918.20
ATLANTIC	4	Diane Meyer	9/13/2015	$200,328.20
ATLANTIC	4	Diane Meyer	10/13/2015	$67,712.00
Sub-total for the Salesman Diane Meyer				**$866,456.47**
ATLANTIC	12	Karen Walker	2/6/2015	$88,093.74
ATLANTIC	12	Karen Walker	3/22/2015	$70,213.25
ATLANTIC	12	Karen Walker	9/13/2015	$217,865.85
Sub-total for the Salesman Karen Walker				**$376,172.84**
ATLANTIC	18	Tim Rosenberg	10/13/2015	$78,634.00
Sub-total for the Salesman Tim Rosenberg				**$78,634.00**
Sub-total for the Area ATLANTIC				**$1,321,263.31**

		Diane Meyer	Karen Walker	Tim Rosenberg
2015	Atlantic Mountains Bikes		$376,172.84	$78,634.00
	Family Bikes	$403,769.38		
	Sunny Bikes	$462,687.10		

In each AREA break level, the cross-table displays the customer values for the year and salesmen.

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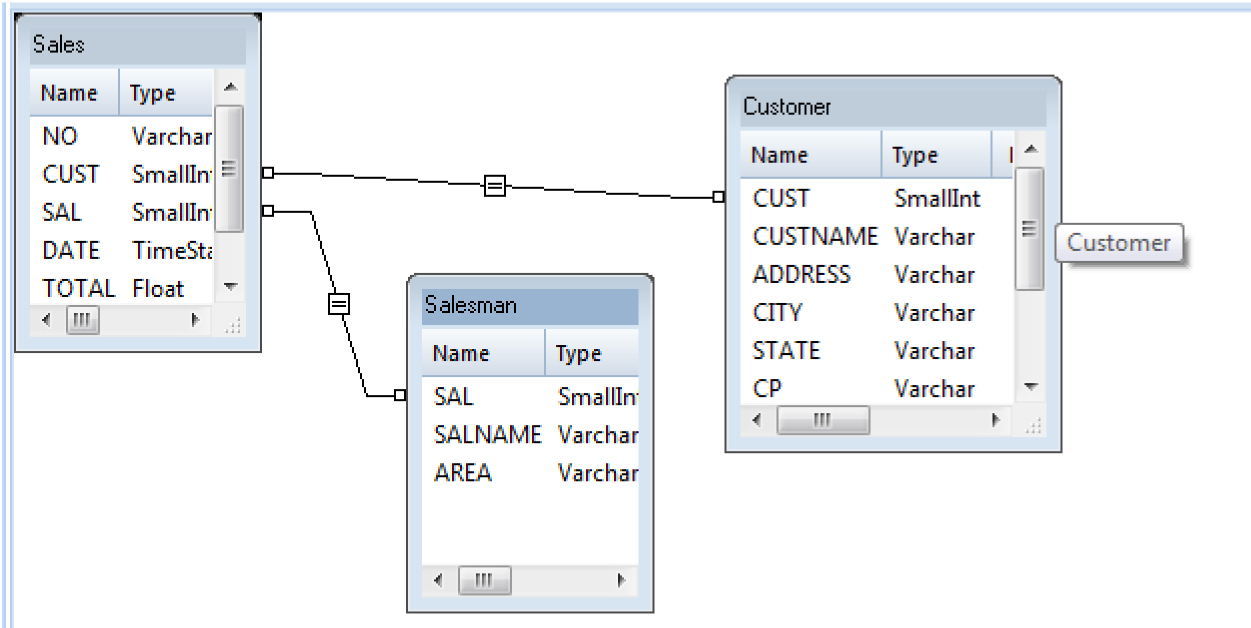
1.12. Adding a Query Data

Using our report example **Report Training** with break levels on Area and Salesman Name, we will add a **Query Data** in the Group Footer Block for each AREA, in order to display for example the number of distinct customer found for each AREA according to the selected Salesmen and/or the specified period.

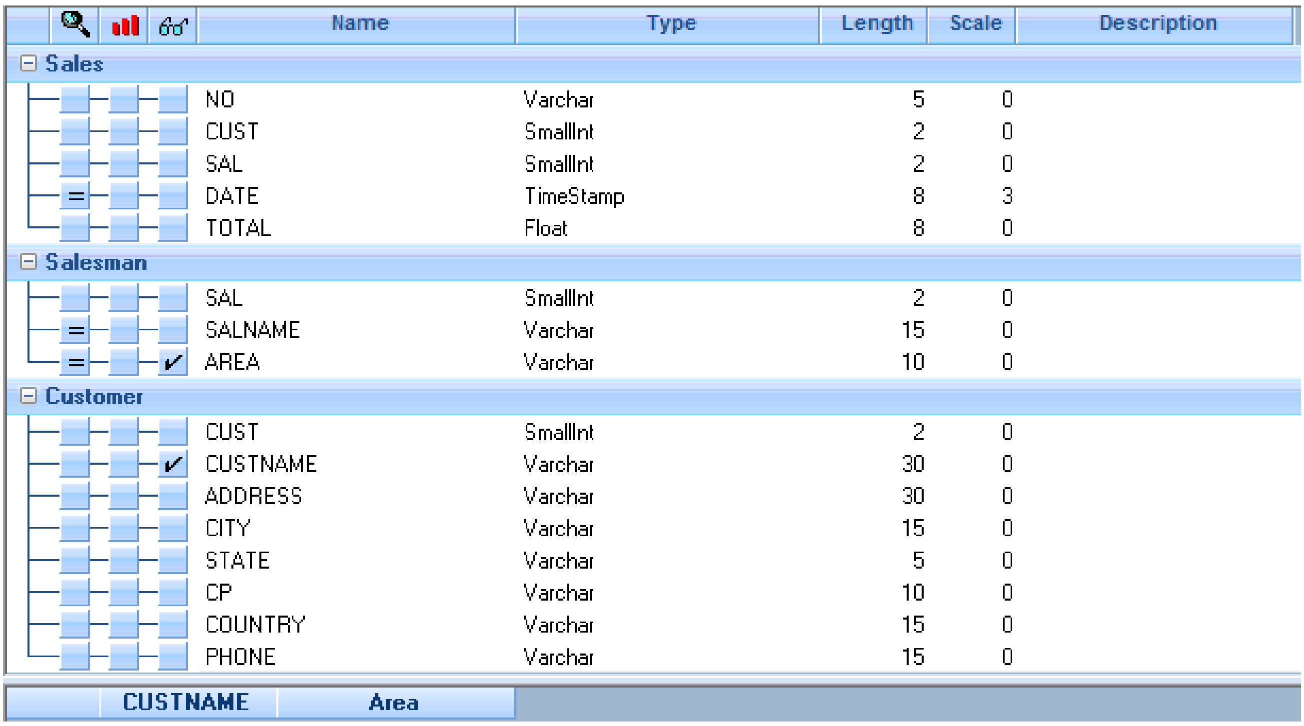
A Query Data is a separate query that will retrieve in a report **only one value**, being the **first column** and the **first row**.

We need first to create the required query retrieving the number of distinct customers, using the same parameters as the report main query. If needed refer to the Click&DECiDE BAI Query User Guide.pdf for more information about how to create a query. The main steps are:

1. Make a copy of the “demo_multicriteria” query under a new name “demo_multicriteria_customer”.
2. Open this new query, select the **Table Tab** and add the table Customer:



3. Go back to the Query Tab and select only the required fields for the Query Data: Custname and Area:



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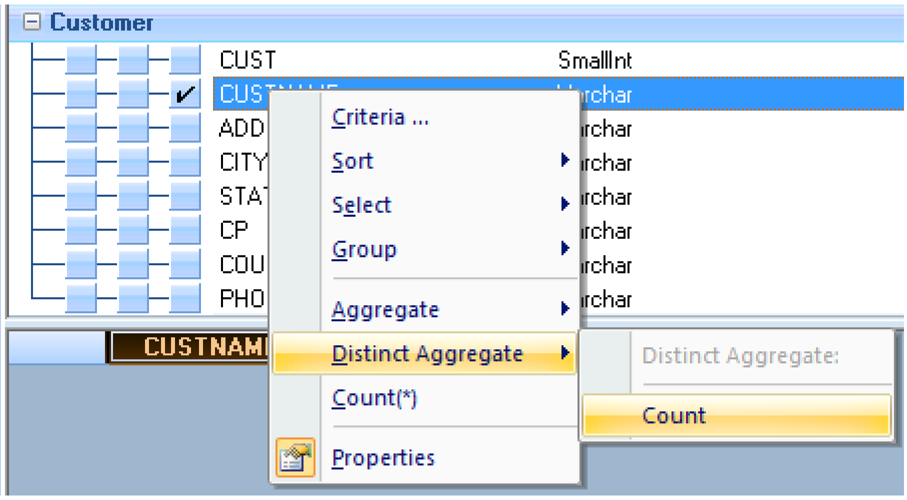
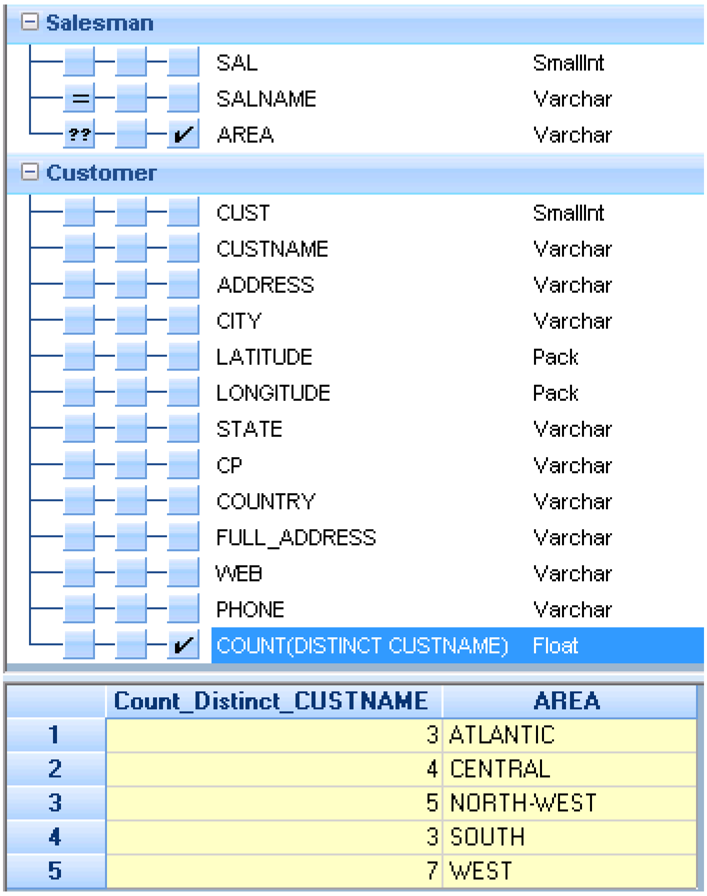
4. Select the CUSTNAME field
5. Make a right mouse click and select **Distinct Aggregate>Count**



6. If you run this query ignoring all parameters values, you should get this result (years 2013 to 2015):



As you can see, you get one row for each area, and the number of distinct Customers is selected in the first position.

7. Save this query as “demo_multicriteria_customer”.
8. Go back to the Main Report and reduce the width of the Cross-Table object in the Group Footer AREA to make place on the right side to add a Label displaying “Distinct Customers”:

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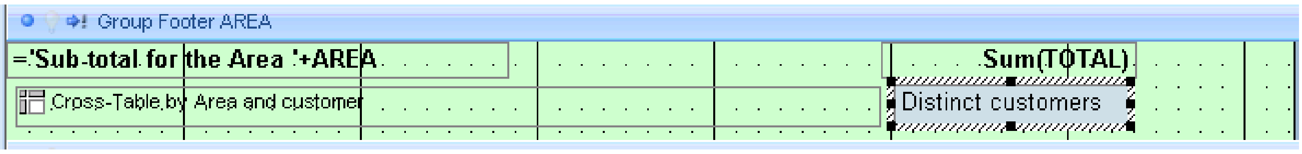
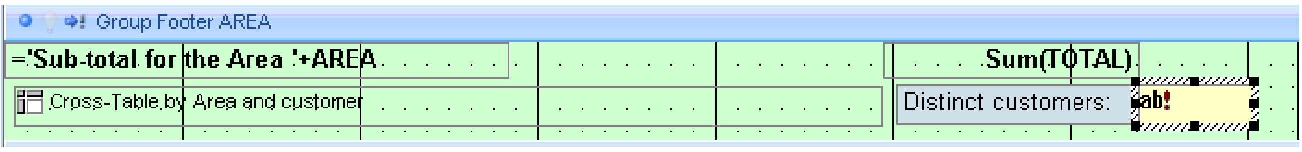
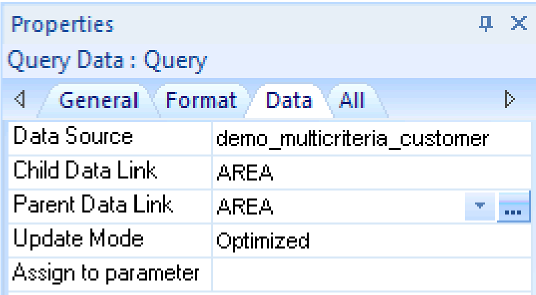


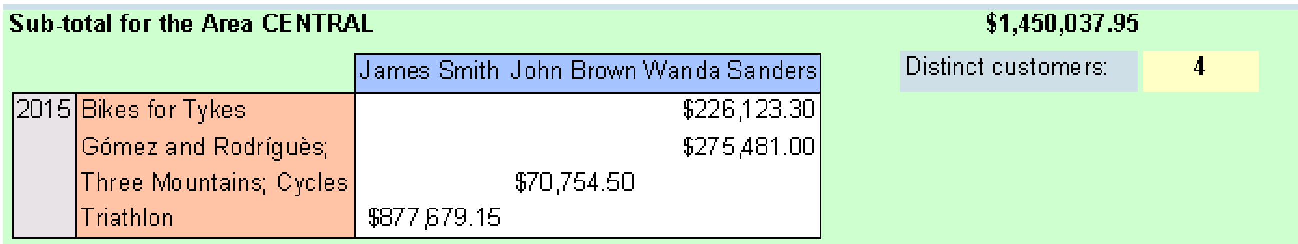
9. Now add a Query/Data object near the Label "Distinct Customers" in the Group Footer AREA Block. To do so, click on the ab! Query Data icon in the Toolbox, then define the target location of the query data object in the Group Footer AREA, on the right of the Label previously added. Apply a light background color and click the Center icon to get the result centered:



10. Open the property dialog box for this query data object and select as data source the new query "demo_multicriteria_customer" previously created and add a link between the AREA fields in the Child Data Link and Parent Data Link to be sure to run this query data only for the current AREA at the break level time:



11. Save and run now the **Report Training** report selecting area and/or period. See the result.



As you can see, the distinct number of customer is now displayed on the right of the cross-table, because at the run time, the Query Data "demo_multicriteria_customer" is run with an automatic additional criterion saying "where AREA is equal to the current AREA value in the Group Footer AREA block".

In the result query previously display, only the second record appears when AREA is equal to CENTRAL:

	Count_Distinct_CUSTNAME	Area
1	3	ATLANTIC
2	4	CENTRAL
3	3	NORTH-WEST
4	3	SOUTH
5	9	WEST

Giving in fact only one row:

	Count_Distinct_CUSTNAME	Area
1	4	CENTRAL

So, in the **Report Training**, the **Query Data** object will display the value **4**, being the **first row** and **first column** when **CENTRAL** area is the current value for the AREA field, that is why the AREA field in this query

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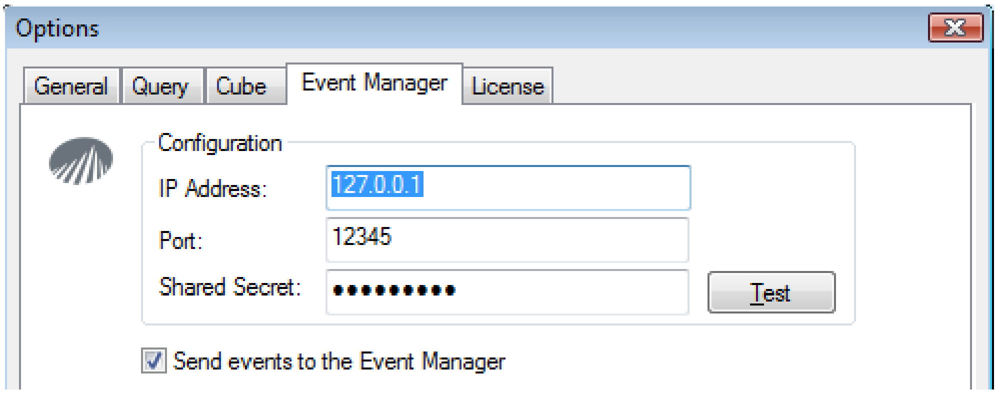
has been selected in second position, only to be able to define the Child Data Link and Parent Data Link with the query of the main report.

2. Defining Alerts

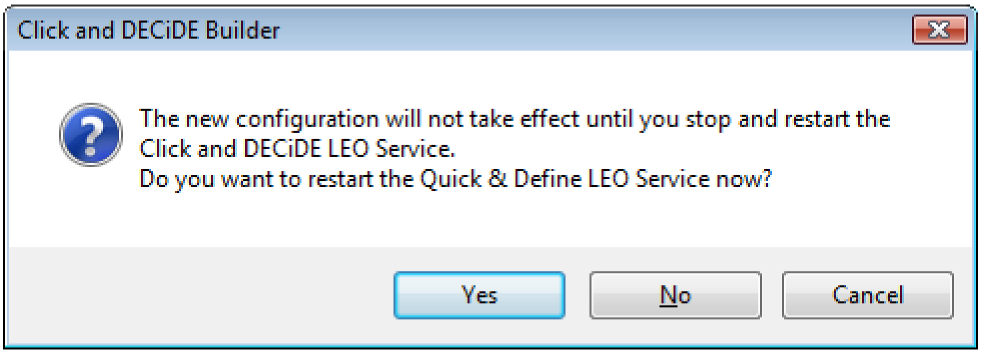
The power of the Click&DECiDE Builder Report Generator is to give a choice to **run a report** (and send the result by e-mail, RSS Feed or other methods describe later) **only when a condition is true**.

A condition could be any result in the report, such as for example an amount lower or greater than an alert value.

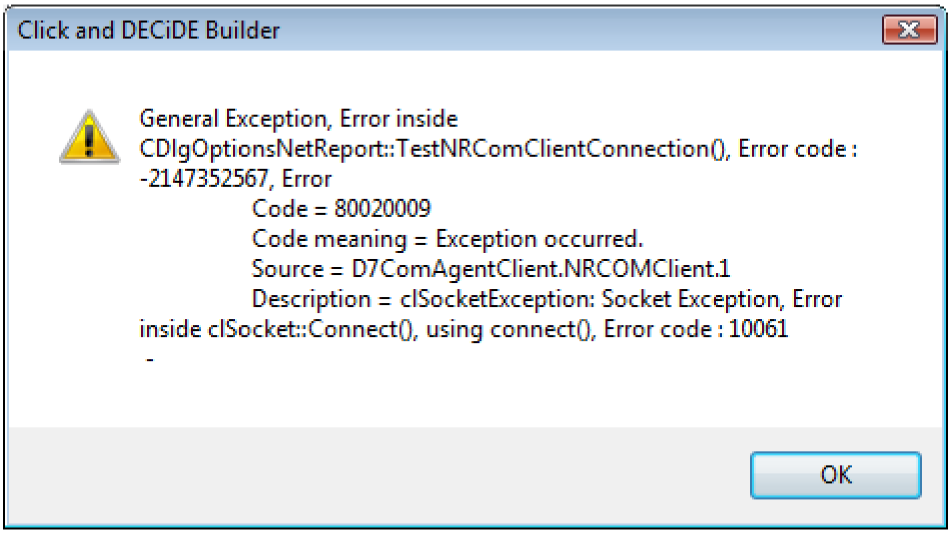
Pre-requisites: on the Server machine check that the Click&DECiDE Builder command **Tools> Options> Event Manager** gets the **Send Events to the Event Manager** option enabled:



Note: Each time you disable or enable this option, the **Click and DECiDE LEO Service** has to be restarted. It is done automatically by Click&DECiDE if you click **Yes** to the following message:



Also click the **Test** button that should display "*Succesful Click and DECiDE NSI Connection*". If not, an error can be display such as:



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The above error means that the **Click and DECiDE Filter Engine Service** is not started. Start this service and try again.

2.1. Alert Types

Click&DECiDE Builder provides 5 alert types:

2.1.1. Run a Click and DECiDE Item

This alert can run any query, report or cube taken in any Click&DECiDE project file (*.wfv).

2.1.2. Send an e-Mail

This alert can send an e-mail with the attached specified report to the defined recipient(s).

2.1.3. Run/e-Mail Click and DECiDE Item

This alert can run a report and send an e-mail in one step with the attached specified report to the defined recipient(s).

2.1.4. Export Google Doc

This alert can export the result to a Google Doc drive.

2.1.5. Roambi Reporting Services

This alert can export the result to the Roambi Application running under a smartphone or tablet. More information on demand for Roambi customers. Not describe in this Manual.

2.1.6. Generate a RSS Feed

This alert can add a record in the RSS Feed table, that can feed the public RSS Feed and be available for any user who has subscribed to the Click and DECiDE RSS Feed, visible in the Feed Headlines gadget. Refer for more information to the Click and DECiDE Web Portal User Guide.pdf manual.

2.1.7. Generate a Highlight

This option will disappear in next Click&DECiDE version 15.1. Only the alert creating an RSS Feed will be maintained.

2.1.8. Generate Information

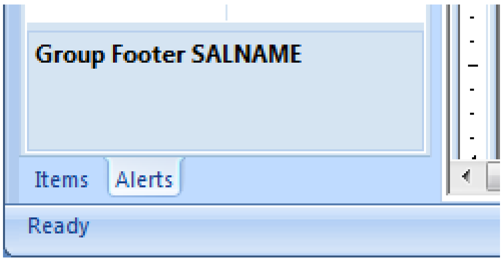
This option will disappear in next Click&DECiDE version 15.1. Only the alert creating an RSS Feed will be maintained.

2.2. Create an alert

An alert is always created in a report block, but the condition can apply to a report field in that block. To create an alert follow the next steps. The example describe in this manual will use the report **Report Training** created in the previous chapters from 1.8 to 1.12. We will generate an alert if the Sum(TOTAL) in the Group Footer SALNAME will be lower than 500,000 USD or Euros.

2.2.1. Alert running a Click&DECiDE item

1. Open the report **Report Training** that must generate the alert.
2. Select the Group Footer SALNAME where is the field named "FGrp_SALNAME_Sum_TOTAL"
3. Click the command **View> Alerts** or, if this command has already be run, make visible the **Alert Tab** by selecting it on the left bottom pane:



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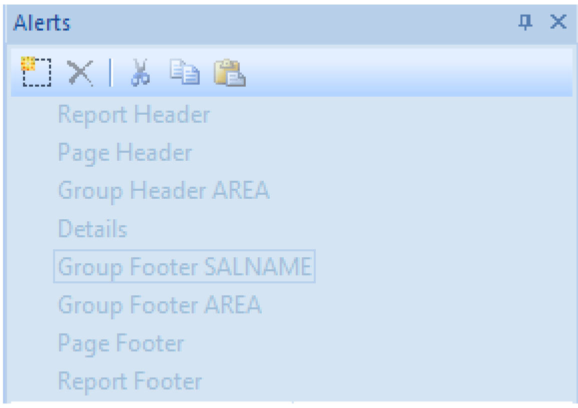
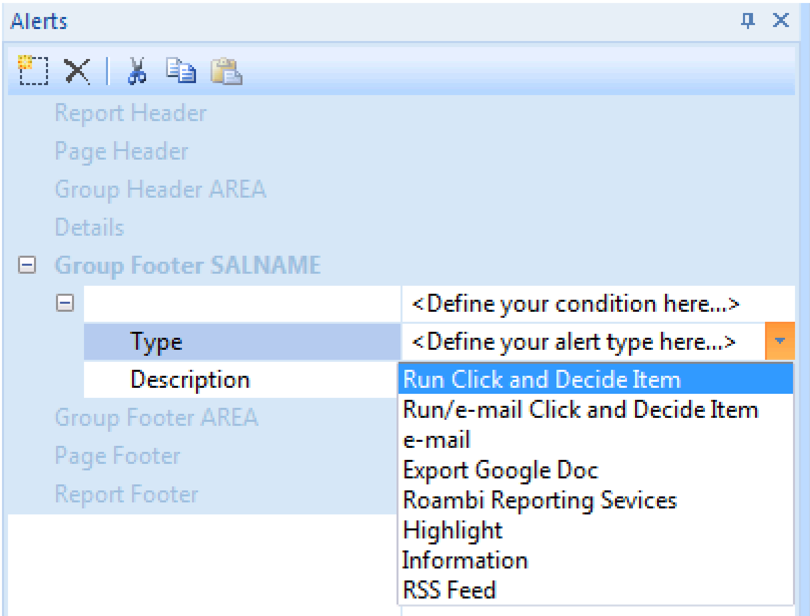
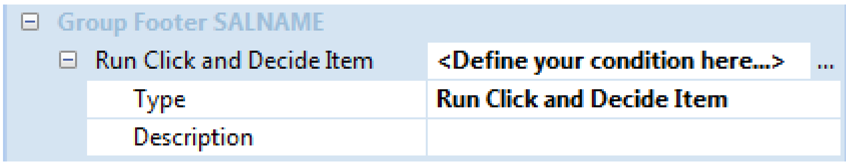
4. The left top pane displays the Alert Tab as follow: select the Group Footer SALNAME Block and click the New Alert icon



5. Select “Run Click and DECiDE Item” in the <Define your alert type here> box.



6. Click the browse button on the right of the <Define your condition here…> box.



7. Enter the condition in the Quick Expression dialog box, example check if the amount for a salesman is lower than 500000. The formula will be: FGrp_SALNAME_Sum_TOTAL < 300000. Click **OK** to validate.

Note: if you do not enter any condition, the program will consider that the condition is always “True”.

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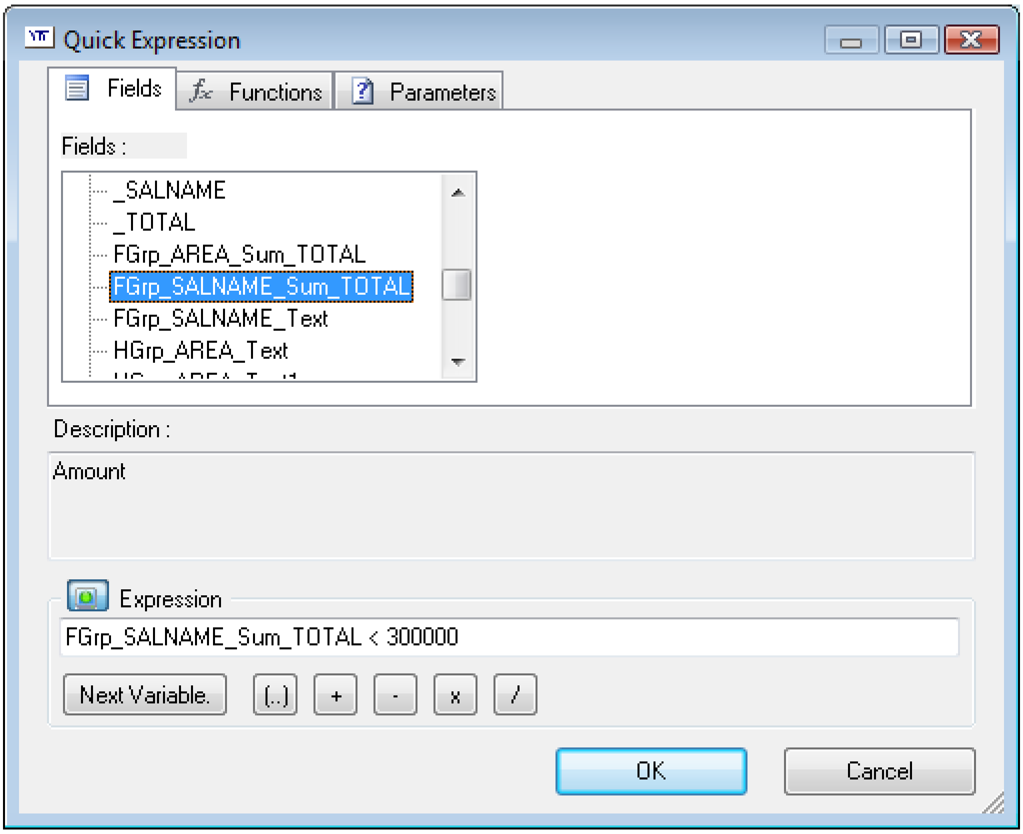
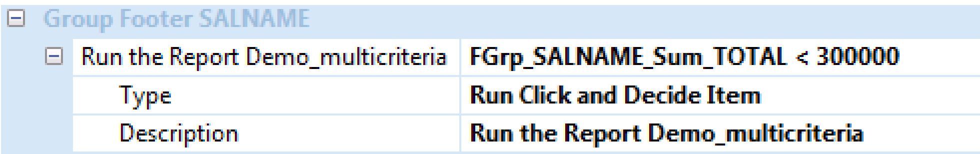
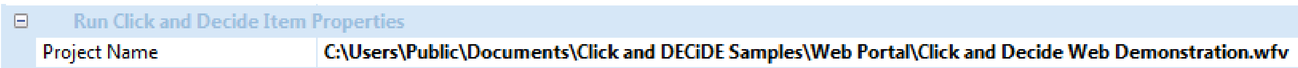


8. Enter a Description about the Alert Type and Condition. The Title of the Alert is now the description you entered:

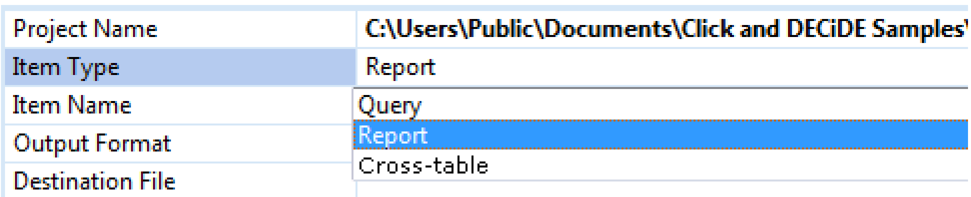


Feed now the Run Click and DECiDE Item Properties to specify which report have to be run, in which project file etc.

9. Click the browse button to search and select the required project file (Click and DECiDE Web Demonstration.wfv).



10. Specify the Item Type you want to run among Query, Report or Cross-table.



11. Search and select the required **item name** to be run. **Warning**: this item cannot be the report in which you are defining the Alert because it will generate a permanent loop. Avoid also to call for an item already included in the same report (as a sub-report or a cross-table) because it will generate twice the alerts: one time when running this item in the main report, one time when running the same item generated by the Alert. If this example we are going to run the report called "**Demo_Multicriteria**, given in the Click and Decide Web Demonstration project file:

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Project Name	C:\Users\Public\Documents\Click and DECiDE Samples\Web Portal\Click and Decide Web Demonstration.wfv
Item Type	Report
Item Name	Demo_Multicriteria
Output Format	PDF

12. Select the Output format (PDF is proposed as default)

Run Click and Decide Item Properties	
Project Name	C:\Program Files\Click and DECiDE\BAI\DemoWeb\Click and Decide Web Demonstration.wfv
Item Type	Report
Item Name	demo_multicriteria_product_alert
Output Format	PDF

13. Define the **Destination File Name**. If you wish to enter a formula instead of a permanent file name, enter first the equal sign before click the browse button to open the Quick Expression Editor and type the required formula:

Project Name	C:\Users\Public\Documents\Click and DECiDE Samples\Web Portal\Click and Decide Web Demonstration.wfv
Item Type	Report
Item Name	Demo_Multicriteria
Output Format	PDF
Destination File	=

Enter an equal sign here before cliking the Browse button to open the Quick Expression Editor if you wish to enter a formula

Type the formula such as for example: `'C:\Users\Public\Documents\Click and DECiDE Samples\Web Portal\Shared Folder\DemoMulticietria_' + SALNAME + '_.pdf'`

SALNAME will be replaced with the Salesman Name on each report.

Project Name	C:\Users\Public\Documents\Click and DECiDE Samples\Web Portal\Click and Decide Web Demonstration.wfv
Item Type	Report
Item Name	Demo_Multicriteria
Output Format	PDF
Destination File	='C:\Users\Public\Documents\Click and DECiDE Samples\Web Portal\Shared Folder\DemoMulticietria_' + SALNAME + '_.pdf'

14. Optional: select a **Suffix** if needed (that will add after the file name and before the extension a suffix according to the selected item). Y for Year, M for Month, D for Day, N for a number.

Suffix	None
Click and DECiDE User	
Click and DECiDE Password	
⊞ Parameters	
Footer AREA	
Footer	
t Footer	

None
YY
YY-1
YYMM
YYMM-1
YYMM-1D
YYMMDD
YYMMDD-1
NNNN

For example, if we are in 2015, the suffix YY will add “15” at the end of the file name.

If we are in 2015, the suffix YY-1 will add “14” at the end of the file name.

If we are in April 2015, the suffix YYMM will add “1504” to the file name.

If we are in April 2015, the suffix YYMM-1 will add “1503” to the file name.

If we are the first of April 2015, the suffix YYMM-1D will add “1503” to the file name, because the day before the first of April was in March.

If we are the 14th of April 2015, the suffix YYMM-1 will add “1504” to the file name, because the day before the 14th of April was in April.

If we are the 14th of April 2015, the suffix YYMMDD will add “150414” to the file name

If we are the 14th of April 2015, the suffix YYMMDD-1 will add “150413” to the file name.

Whatever the date is, the suffix NNNN will add “0001” to the file name if not exists, or will increment the number using the last one plus one if the file name already exists.

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Select for this example the NNNN suffix, so that if several files are created and if a name already exists, they will get distinct names:

Project Name	C:\Users\Public\Documents\Click and DECiDE Samples\Web Portal\Click and Decide Web Demonstration.wfv
Item Type	Report
Item Name	Demo_Multicriteria
Output Format	PDF
Destination File	**='C:\Users\Public\Documents\Click and DECiDE Samples\Web Portal\Shared Folder\DemoMulticietria_' + SALNAME + '_.pdf'**
Suffix	**NNNN**

15. Optional: define a **Login** valid to run this item, UserID and Password, corresponding to the Data Source used. If the Data Source is using the Windows Authentication, no login is required here. If you are using the Click and DECiDE Authentication Mode, you can enter the Admin/Admin or Guest/Guest default login to run this example based on the local SQL Server database.

Project Name	C:\Users\Public\Documents\Click and DECiDE Samples\Web Portal\Click and Decide Web Demonstration.wfv
Item Type	Report
Item Name	Demo_Multicriteria
Output Format	PDF
Destination File	**='C:\Users\Public\Documents\Click and DECiDE Samples\Web Portal\Shared Folder\DemoMulticietria_' + SALNAME + '_.pdf'**
Suffix	**NNNN**
Click and DECiDE User	**Admin**
Click and DECiDE Password	*****

16. Feed the **parameter** values. As you can see the Parameters box automatically displays the parameters found in the selected report with their default values.

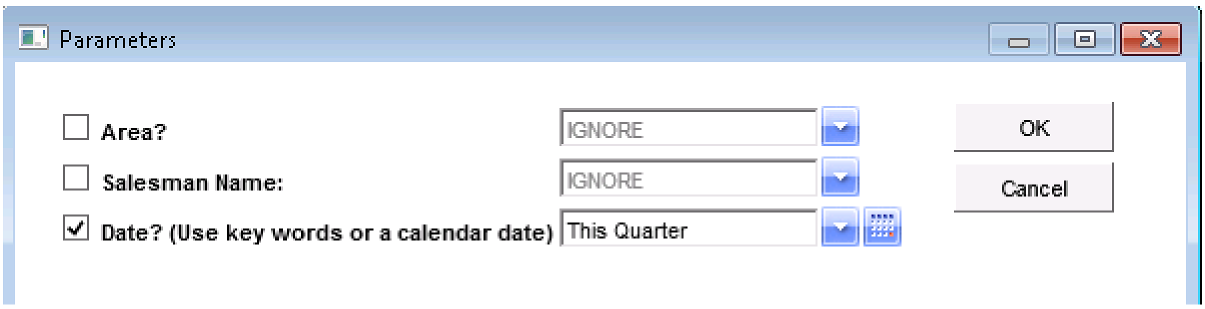
Parameters	AREA_PARAM=IGNORE;SALNAME_PARAM=IGNORE;P_DATE=IGNORE|IGNORE
AREA_PARAM	IGNORE
SALNAME_PARAM	IGNORE
P_DATE	IGNORE|IGNORE

Change, if needed, the default values for each parameter. In our example we **absolutely** need to specify that the AREA_PARAM parameter must apply to the Area field, and the SALNAME_PARAM parameter must apply to the Salesman name field, and the P_DATE must apply to the Date field.

Parameters	**AREA_PARAM== AREA;SALNAME_PARAM== SALNAME;P_DATE== DATE**
AREA_PARAM	**= AREA**
SALNAME_PARAM	**= SALNAME**
P_DATE	**= DATE**

17. Save the report **Report Training**.

18. Run the report to test the result. **Warning!** a preview will never generate Alerts, you need to print or export the report to any output format to generate alerts. Export the report to PDF format, by selecting for example Q1 2015, or a keyword such as “This Quarter” and click **OK**:



19. Once the report is finish, go to the destination directory `C:\Users\Public\Documents\Click and DECiDE Samples\Web Portal\Shared Folder\` to see if one or several reports have been generated if the Alert condition was true:

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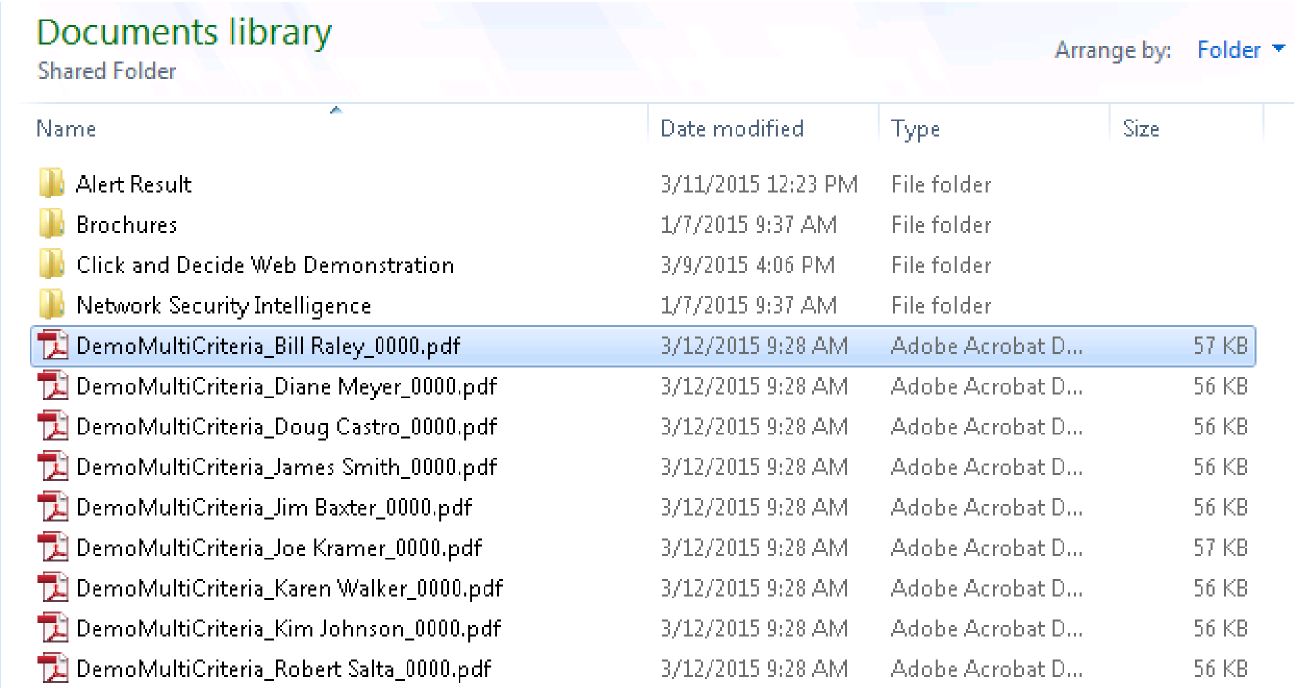
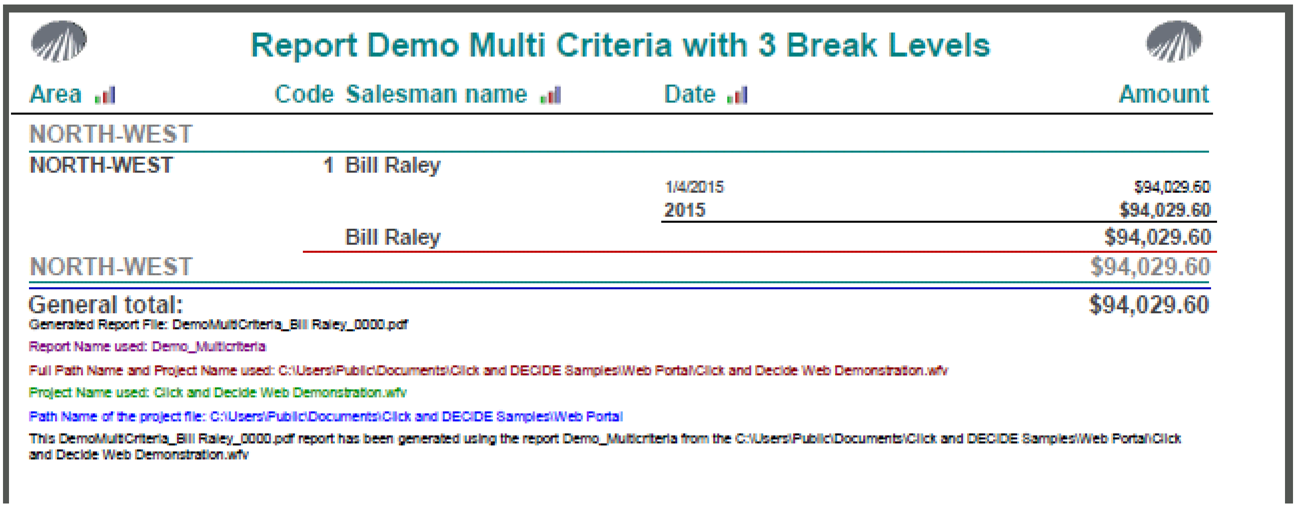


As we can see in the above example, 9 reports have been generated for salesmen having an amount lower than 300000. Open each PDF to check the result:

The first one gives the result for Bill Raley and the amount is lower that 300000:



Check the other PDF results and check if the **Report Training** exported for Q1 2015 contains, among all salesmen, only 9 salesmen having an amount lower than 300000.

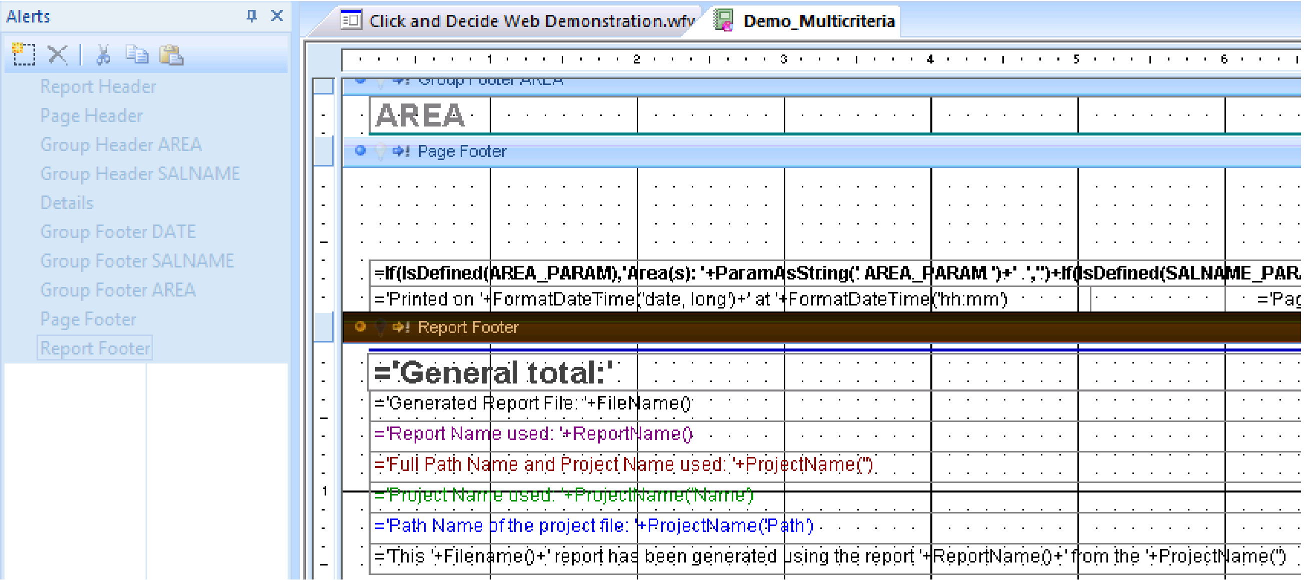
2.2.2. Alert sending an e-Mail

In the previous paragraph, the Report Training generates the report **demo_multicriteria** only when the Alert is true, the Alert being the total amount for each Salesman lower than 300000.

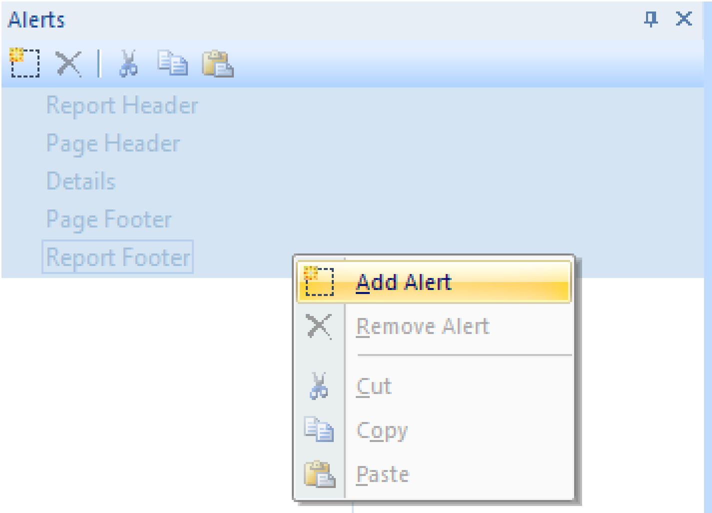
When the condition is true, one or several PDF report files are created in the Shared Folder directory. So, any Web User connected to the Click&DECiDE Web Portal can see any new report in this Shared Folder, if authorized in their menus.

Sometimes you need to prefer to send the Alert Report to one or several users by e-mail. To do so, we are going to modify the report **demo_multicriteria** so that an e-Mail will be sent when an Alert is true.

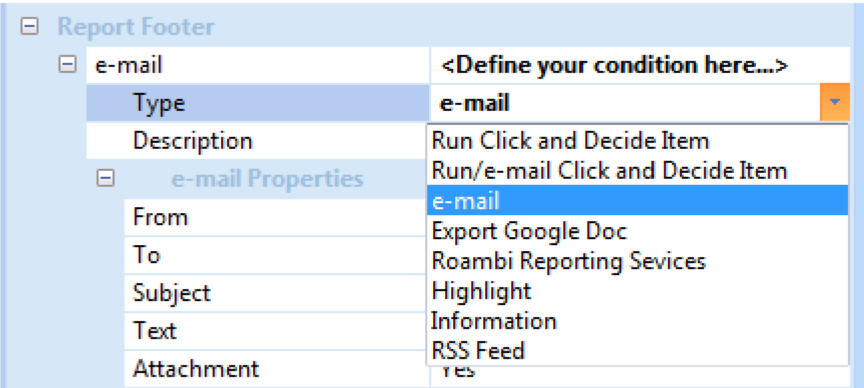
1. Open the sub-report **demo_multicriteria**.
2. Select the **Report Footer** block and open the Alert Tab if not already open.



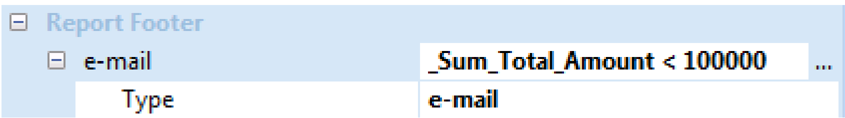
1. Click on the **New Alert** icon or make a right mouse click and select **Add Alert**:



3. Select **e-mail** for the **Alert Type**.



4. Define the **Alert Condition** entering the following formula: *_Sum_Total_Amount < 100000*, if _Sum_Total_Amount is the internal name of the Sum(Sum_Amount) field located in the Report Footer.



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5. Enter a **Description** for this Alert, example “Send by e-Mail if Main Total lower than 100000”.

Report Footer	
Send by e-Mail if Main Total lower than 1000...	_Sum_Total_Amount < 100000
Type	e-mail
Description	Send by e-Mail if Main Total lower than 100000

6. Define the **e-mail properties**, the **From** and **To** e-mail addresses

e-mail Properties	
From	clickndecide@clickndecide.com
To	didier@clickndecide.com;pierre@clickndecide.com ...

7. Enter the **Subject** that can be a formula if you click the browse button. Example enter a formula such as '*Alert: the products sold by the salesman '* + *SALNAME* + *' are lower than 100000 Euros*'

e-mail Properties	
From	societe@clickndecide.com
To	didier@clickndecide.com;pierre@clickndecide.com
Subject	='Alert: the products sold by the salesman ' + SALNAME + ' are lower than 100000 Euros'

8. Enter a **Text message** that could be a formula if you click the browse button. Example enter a formula such as '*Please find attached a Report PDF file for the Salesman '* + *SALNAME* + *' whose total amount is '* + *AsString(Floor(_Sum_Amount_Total))+ ' Euros*'

e-mail Properties	
From	societe@clickndecide.com
To	didier@clickndecide.com;pierre@clickndecide.com
Subject	='Alert: the products sold by the salesman ' + SALNAME + ' are lower than 100000 Euros'
Text	='Please find attached a Report PDF file for the Salesman ' + SALNAME + ' whose total amount is ' + AsString(Floor(_Sum_Amount_Total))+ ' Euros'

9. Keep the option Attachment = Yes to get the generated report sent with the e-mail.

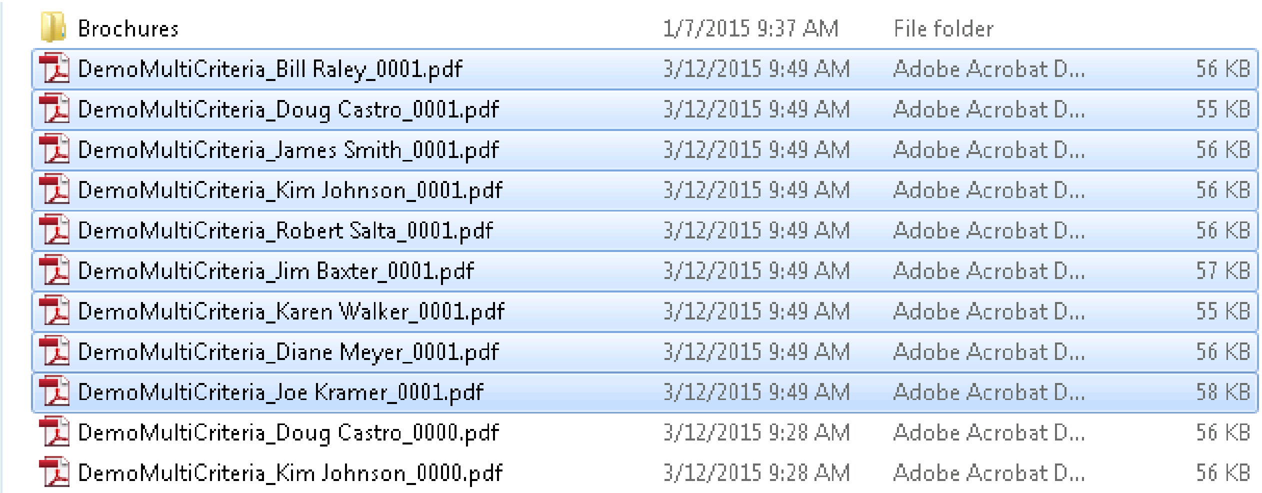
Report Footer	
Send by e-Mail if Main Total lower than 100000	_Sum_Total_Amount < 100000
Type	e-mail
Description	Send by e-Mail if Main Total lower than 100000
e-mail Properties	
From	societe@clickndecide.com
To	didier@clickndecide.com;pierre@clickndecide.com
Subject	='Alert: the products sold by the salesman ' + SALNAME + ' are l
Text	='Please find attached a Report PDF file for the Salesman ' + S
Attachment	Yes

10. Save and close the report **demo_multicriteria.**.

11. Run now the report **Report Training** for the period Q1 2015 for example.

As you can see in the destination Shared Folder, 9 new reports have been generated, with a new suffix at the end (NNNN = 0001 the second time) of each file name if the previous number already existed, such as the following example:

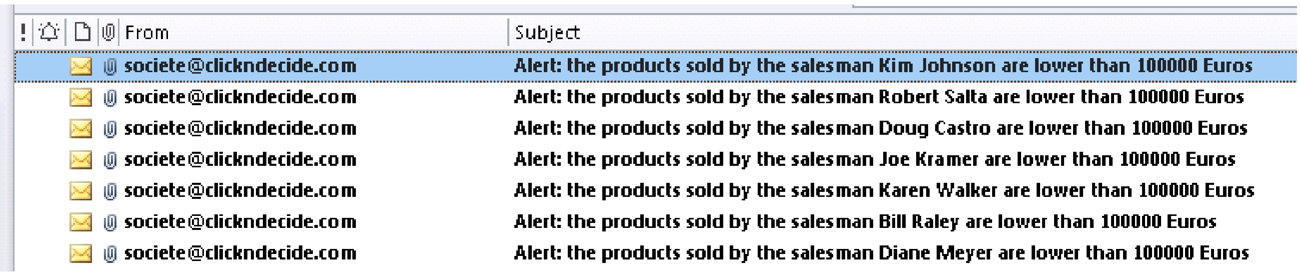
Contact us: E-mail: support@clickndecide.com **Tel:** +33 (0)4 67 84 48 00
Headquarters: Click&DECiDE 130, rue du Baptistou - 34980 St Gély du Fesc, France.
To contact your nearest Click&DECiDE partner, click here.



Brochures	1/7/2015 9:37 AM	File folder	
DemoMultiCriteria_Bill Raley_0001.pdf	3/12/2015 9:49 AM	Adobe Acrobat D...	56 KB
DemoMultiCriteria_Doug Castro_0001.pdf	3/12/2015 9:49 AM	Adobe Acrobat D...	55 KB
DemoMultiCriteria_James Smith_0001.pdf	3/12/2015 9:49 AM	Adobe Acrobat D...	56 KB
DemoMultiCriteria_Kim Johnson_0001.pdf	3/12/2015 9:49 AM	Adobe Acrobat D...	56 KB
DemoMultiCriteria_Robert Salta_0001.pdf	3/12/2015 9:49 AM	Adobe Acrobat D...	56 KB
DemoMultiCriteria_Jim Baxter_0001.pdf	3/12/2015 9:49 AM	Adobe Acrobat D...	57 KB
DemoMultiCriteria_Karen Walker_0001.pdf	3/12/2015 9:49 AM	Adobe Acrobat D...	55 KB
DemoMultiCriteria_Diane Meyer_0001.pdf	3/12/2015 9:49 AM	Adobe Acrobat D...	56 KB
DemoMultiCriteria_Joe Kramer_0001.pdf	3/12/2015 9:49 AM	Adobe Acrobat D...	58 KB
DemoMultiCriteria_Doug Castro_0000.pdf	3/12/2015 9:28 AM	Adobe Acrobat D...	56 KB
DemoMultiCriteria_Kim Johnson_0000.pdf	3/12/2015 9:28 AM	Adobe Acrobat D...	56 KB

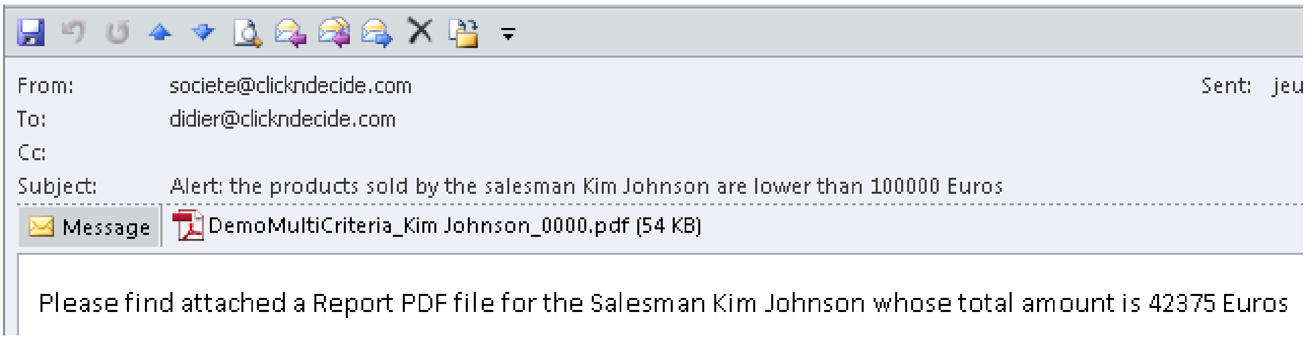
12. Check your **e-mail** box

If your e-mail address was in the recipient list, you should receive 7 e-mails with the attached report PDF file for each salesman, as follow:



From	Subject
societe@clickndecide.com	Alert: the products sold by the salesman Kim Johnson are lower than 100000 Euros
societe@clickndecide.com	Alert: the products sold by the salesman Robert Salta are lower than 100000 Euros
societe@clickndecide.com	Alert: the products sold by the salesman Doug Castro are lower than 100000 Euros
societe@clickndecide.com	Alert: the products sold by the salesman Joe Kramer are lower than 100000 Euros
societe@clickndecide.com	Alert: the products sold by the salesman Karen Walker are lower than 100000 Euros
societe@clickndecide.com	Alert: the products sold by the salesman Bill Raley are lower than 100000 Euros
societe@clickndecide.com	Alert: the products sold by the salesman Diane Meyer are lower than 100000 Euros

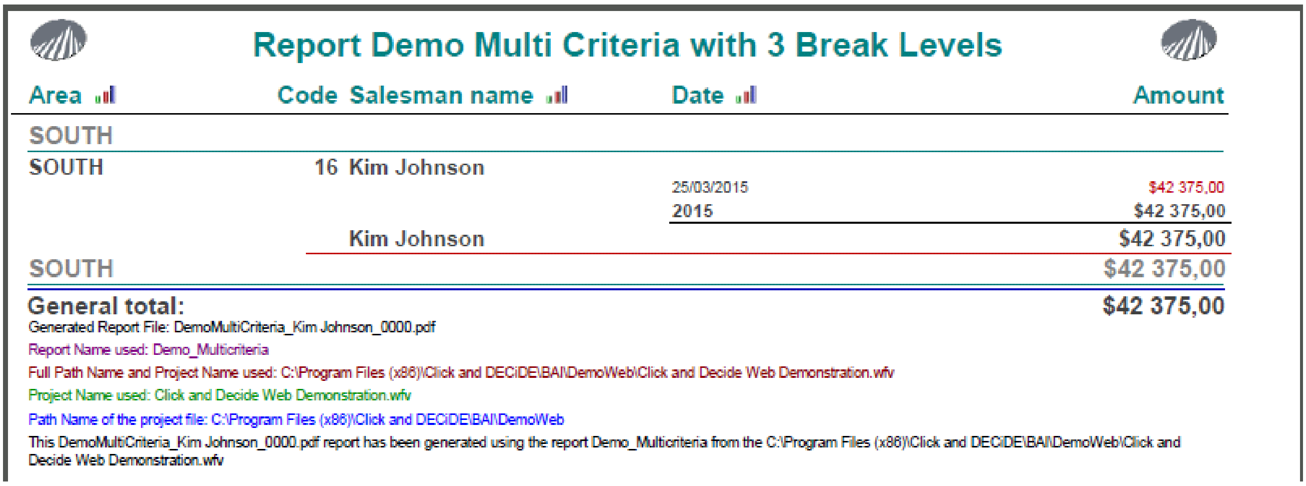
Each mail gives detail about the Amount for each salesman being lower than 100000 euros:



From: societe@clickndecide.com Sent: jeu
To: didier@clickndecide.com
Cc:
Subject: Alert: the products sold by the salesman Kim Johnson are lower than 100000 Euros
Message DemoMultiCriteria_Kim Johnson_0000.pdf (54 KB)

Please find attached a Report PDF file for the Salesman Kim Johnson whose total amount is 42375 Euros

13. Open any PDF file to see detailed information:



Report Demo Multi Criteria with 3 Break Levels

Area	Code	Salesman name	Date	Amount
SOUTH				
SOUTH	16	Kim Johnson		
			25/03/2015	$42 375,00
			2015	$42 375,00
		Kim Johnson		$42 375,00
SOUTH				$42 375,00
General total:				$42 375,00

Generated Report File: DemoMultiCriteria_Kim Johnson_0000.pdf
Report Name used: Demo_Multicriteria
Full Path Name and Project Name used: C:\Program Files (x86)\Click and DECiDE\BAI\DemoWeb\Click and Decide Web Demonstration.wfv
Project Name used: Click and Decide Web Demonstration.wfv
Path Name of the project file: C:\Program Files (x86)\Click and DECiDE\BAI\DemoWeb
This DemoMultiCriteria_Kim Johnson_0000.pdf report has been generated using the report Demo_Multicriteria from the C:\Program Files (x86)\Click and DECiDE\BAI\DemoWeb\Click and Decide Web Demonstration.wfv

2.2.3. Run/e-mail Click&DECiDE Item

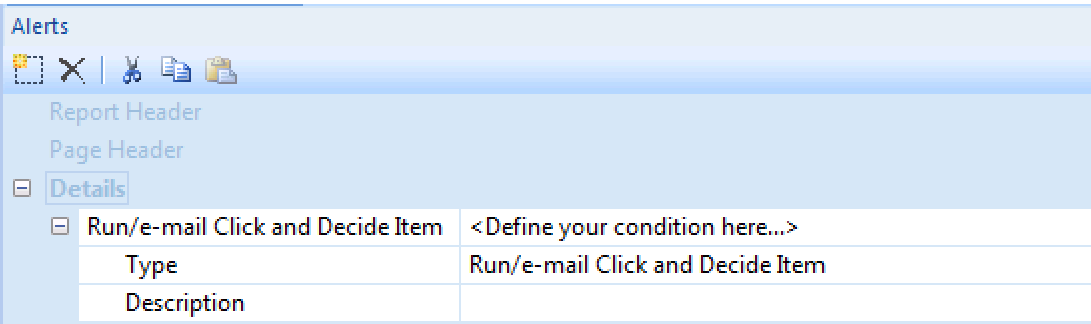
This new alert since Click&DECiDE version 12 allows to run a Click&DECiDE item and send the result by e-Mail at the same time. This is faster than run a Click&DECiDE item (See 2.2.1) and define in this item another alert sending the result by e-Mail (See 2.2.2).

An example is given in the `Click and DECiDE Web Demonstration.wfv` project file located in the `C:\Users\Public\Documents\Click and DECiDE Samples\Web Portal` directory.

Open the report "Alert Run and Email a Report". This report asks you to select an Area and their Salesmen, then a Period and specify a Sender e-Mail address compliant with your SMTP Server. Then the result will be a PDF that will give you the list of the Salesman having done some sales in the chosen period. Each concerned salesman will get an e-Mail to their respective a-Mail Address at yopmail.com with their sales using the Demo Multicriteria report.

How is defined this alert?

1. Click View > Alerts to open the Alerts Tab. As you can see an alert has been defined in the Detail Block:



Note: if the condition is not defined, then the condition is always "True".

2. Select the Item to be run and the Output format:

Run/e-mail Click and Decide Item Properties	
Project Name	%CND_BAI_SAMPLES%\Web Portal\Click and DECiDE Web Demonstration.wfv
Item Type	Report
Item Name	Demo_Multicriteria
Output Format	PDF

3. Select the destination file name and the suffix (optional)

Run/e-mail Click and Decide Item Properties	
Project Name	%CND_BAI_SAMPLES%\Web Portal\Click and DECiDE Web Demonstration.wfv
Item Type	Report
Item Name	Demo_Multicriteria
Output Format	PDF
Destination File	='%CND_BAI_SAMPLES%\Web Portal\Shared Folder\Alert Result\Sales for Vendor ' + SALNAME + '_.pdf'
Suffix	NNNN

Note that the destination file name will use the Vendor name (SALNAME field)

4. Specify, if needed, the login (if you are not using the Windows Authentication mode)

Click and DECiDE User	
Click and DECiDE Password	

5. Specify the parameters to be used

Parameters	AREA_PARAM==ParamAsString(' AREA_PARAM ');SALNAME_PARAM==SALNAME;P_DATE==ParamAsSt...
AREA_PARAM	=ParamAsString(' AREA_PARAM ')
SALNAME_PARAM	=SALNAME
P_DATE	=ParamAsString('P_DATE',1)

Each parameter can be linked to a column name or a parameter value.

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Headquarters: Click&DECiDE 130, rue du Baptistou - 34980 St Gély du Fesc, France.
To contact your nearest Click&DECiDE partner, click here.

6. Specify the information required to send the e-Mail

From	= PMAilSender
To	= MAIL
Subject	='Sales for the vendor ' + SALNAME + ' from the Area ' + AREA
Text	test

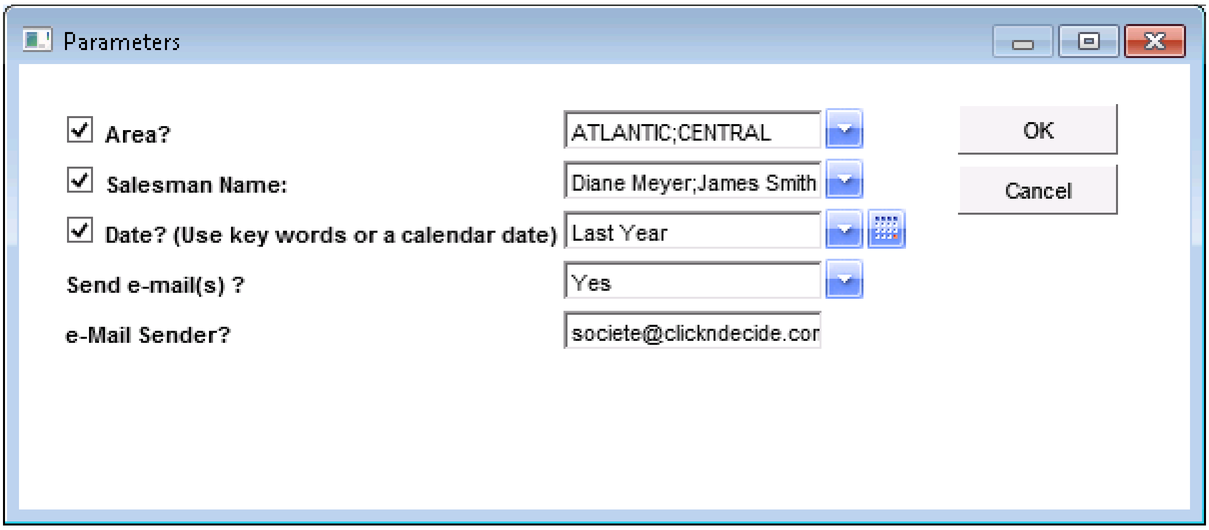
The “From” box must be a Sender e-Mail address recognized by your SMTP Server. In this example we have a Parameter “PMailSender” that ask you this information.

The “To” box will get the value of the Vendor e-Mail address being in the MAIL field.

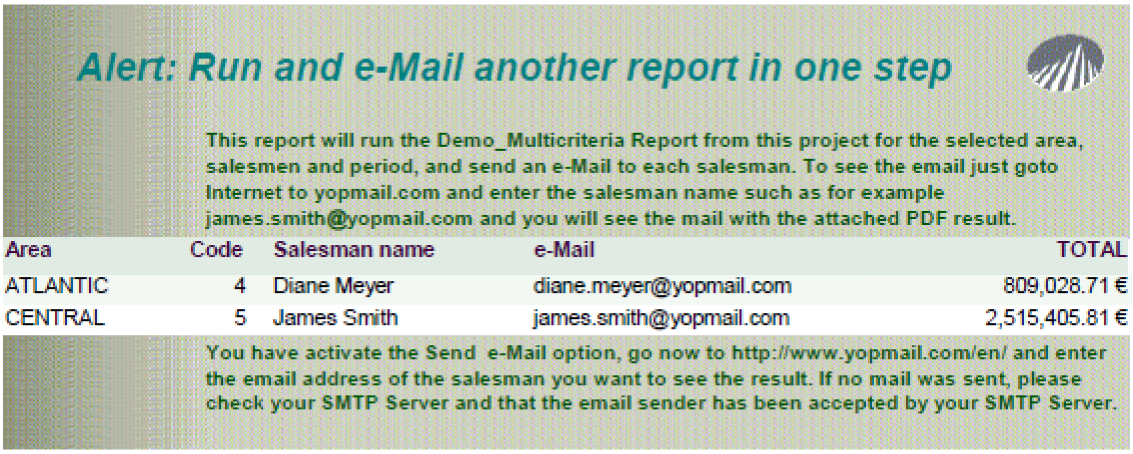
The subject could be a fixed text or a formula that will generate a customized message subject.

The Text box can also be a fixed text or a formula that will generate a customized message text.

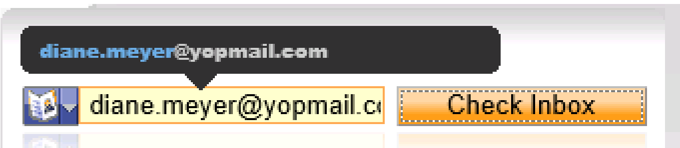
7. Run the report “Alert Run and Email a Report” to PDF output format or printer.
8. Select the parameter values

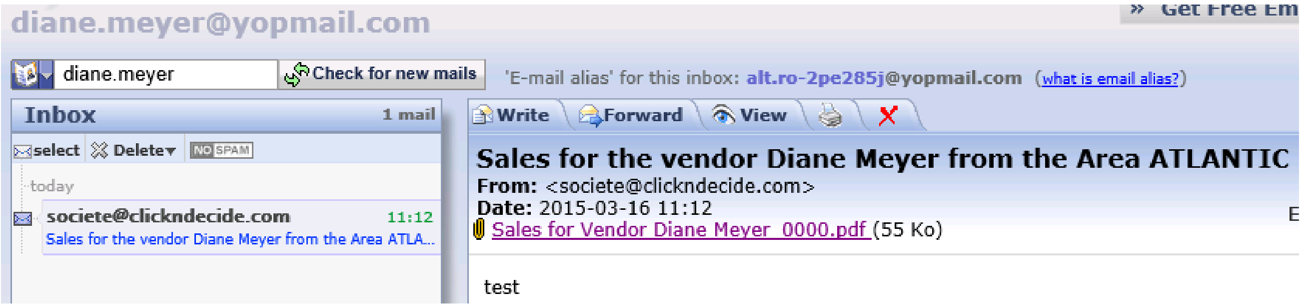


9. See the result

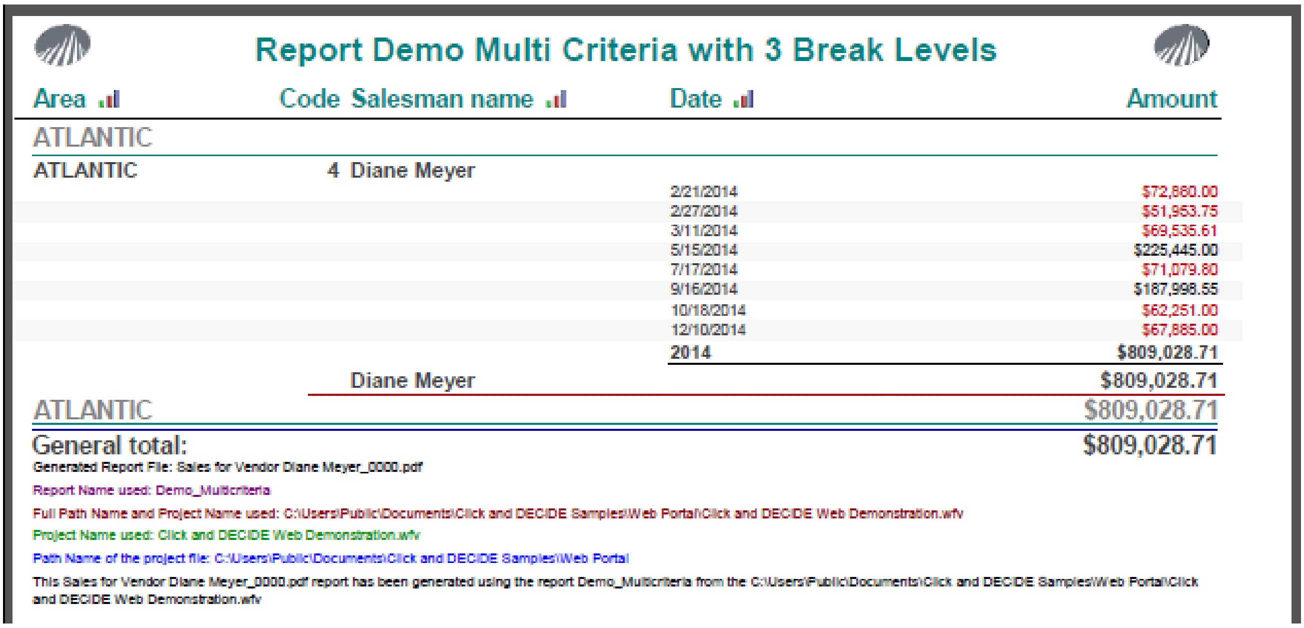


10. Go to yopmail.com to check the e-mails

For Diane Meyer:  click “Check Inbox”:



Click the PDF link to open the Demo Multicriteria Report for the vendor:



Report Demo Multi Criteria with 3 Break Levels

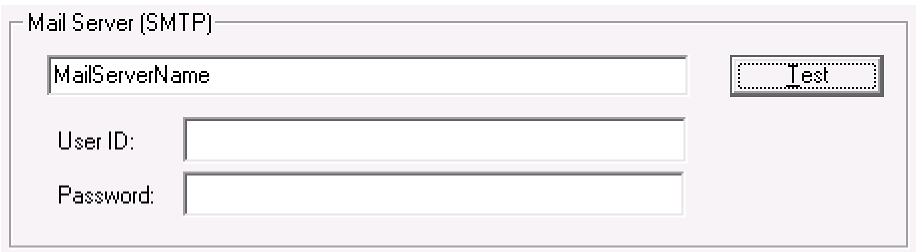
Area	Code	Salesman name	Date	Amount
ATLANTIC				
ATLANTIC	4	Diane Meyer		
			2/21/2014	$72,860.00
			2/27/2014	$51,953.75
			3/11/2014	$69,535.61
			5/15/2014	$225,445.00
			7/17/2014	$71,079.80
			9/16/2014	$187,998.55
			10/18/2014	$62,251.00
			12/10/2014	$67,885.00
			2014	$809,028.71
		Diane Meyer		$809,028.71
ATLANTIC				$809,028.71
General total:				$809,028.71

Generated Report File: Sales for Vendor Diane Meyer_0000.pdf
Report Name used: Demo_Multicriteria
Full Path Name and Project Name used: C:\Users\Public\Documents\Click and DECiDE Samples\Web Portal\Click and DECiDE Web Demonstration.wfv
Project Name used: Click and DECiDE Web Demonstration.wfv
Path Name of the project file: C:\Users\Public\Documents\Click and DECiDE Samples\Web Portal
This Sales for Vendor Diane Meyer_0000.pdf report has been generated using the report Demo_Multicriteria from the C:\Users\Public\Documents\Click and DECiDE Samples\Web Portal\Click and DECiDE Web Demonstration.wfv

Note that using this alert method, it was not necessary to define any alert in the Demo Multicriteria Report.

2.2.4. E-Mail possible troubles

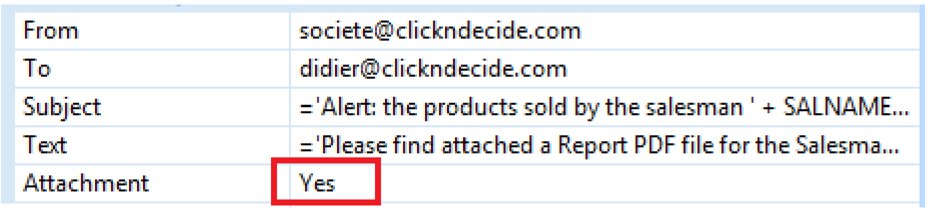
1. If you get no Report PDF result in the destination directory, it could be because no record matches the alert condition. Try again for another period and check the result in a preview in Click&DECiDE Builder or because the **Click and DECiDE Filter Engine Service** is not started
2. If you get Report PDF result in the destination directory, but no e-mail, it could be because you mail server has not been entered when running the Configuration Wizard or is wrong. Run again the Configuration Wizard and check the connection to the specified mail server name.



Consult if needed the Event Viewer and check your mail server.

3. If you get Report PDF result in the destination directory, and you get a some e-mails but without the attached file, check if Attachment has been set to Yes in the e-mail properties:

Contact us: E-mail: support@clickndecide.com Tel: +33 (0)4 67 84 48 00
Headquarters: Click&DECiDE 130, rue du Baptistou - 34980 St Gély du Fesc, France.
To contact your nearest Click&DECiDE partner, click here.



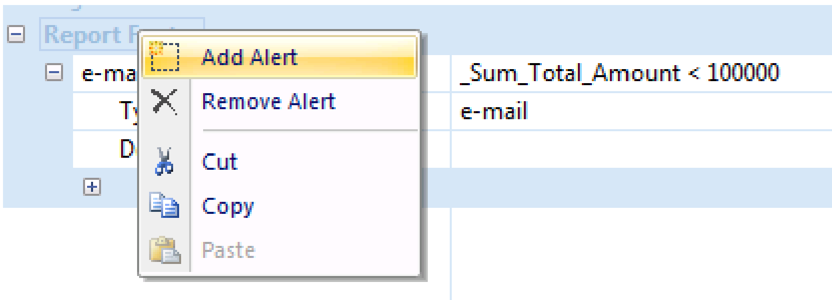
Consult if needed the Event Viewer.

2.2.5. Alert sending result to a Google Doc

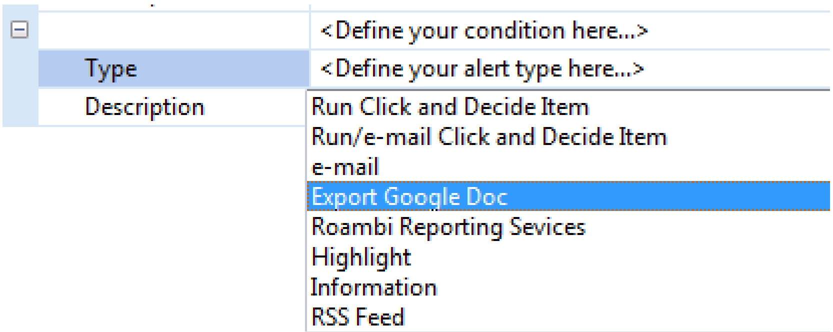
An alert can also send the result file (PDF, Excel, etc.) to a Google Doc in the specified Google Drive.

Using the **demo_multicriteria** report, here are the step to follow to do that:

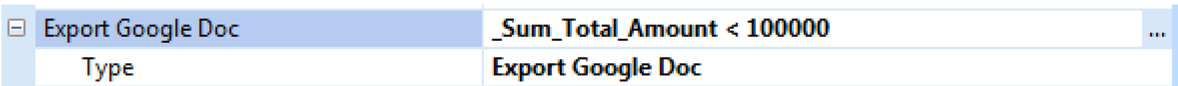
1. Open the report **demo_multicriteria**.
2. Click the **Report Footer** block and open the Alert Tab
3. We can add another Alert on the same block send the result to a **Google Doc** document in your Google Drive. Click on the **New Alert** icon or make a right mouse click and select **Add Alert**:



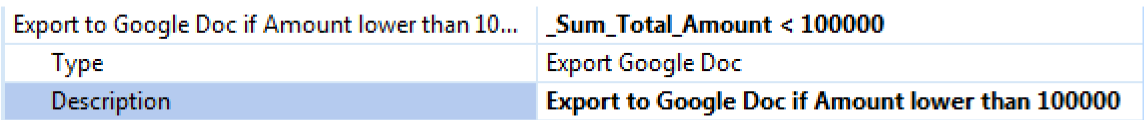
4. Select **Export Google Doc** for the **Alert Type**:



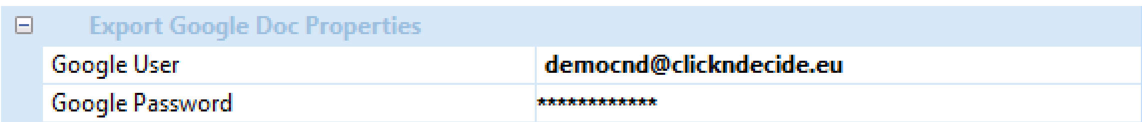
5. Enter the **Alert condition** using the same formula as the one defined for the e-mail alert



6. Enter a **Description** as for example Export to Google Doc if Amount lower than 300000



7. Feed now the **Export Google Doc** Properties.(Login for your Google Account)



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Headquarters: Click&DECiDE 130, rue du Baptistou - 34980 St Gély du Fesc, France.
To contact your nearest Click&DECiDE partner, click here.

8. Enter now the **Collection** (destination folder in your Google Drive):

Export Google Doc Properties	
Google User	**democnd@clickndecide.eu**
Google Password	************
Collection	/Public/filename

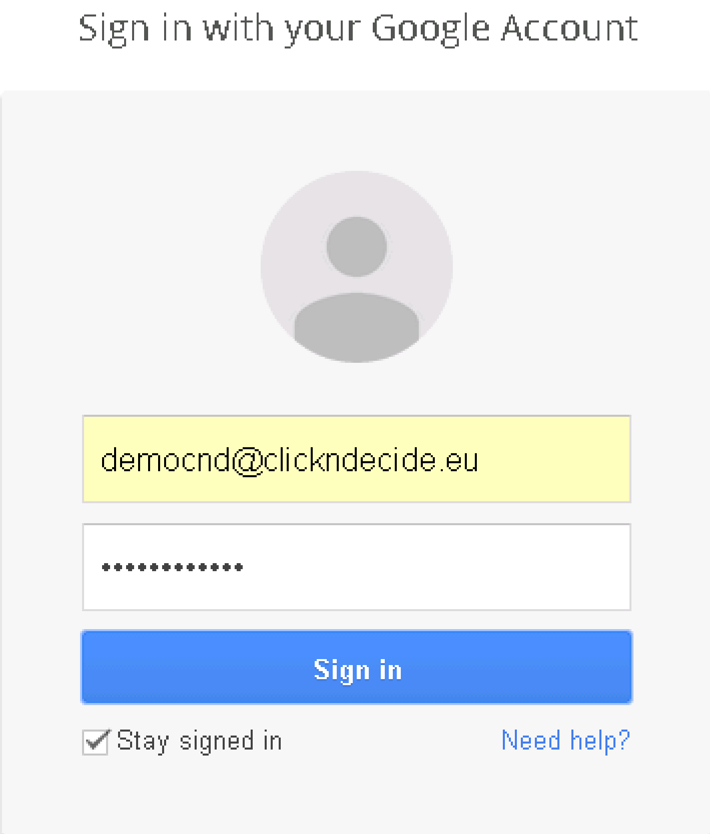
The above example will create a file under the name "FileName" in the Public Shared Folder of the Google Drive. To avoid this fixed name, we can customize the file name using this formula:

='/Public/' + SALNAME + '_' + AsSTring(FormatDateTime('yyyy-mm-dd'))

The SALNAME being the Vendor Name and the current date will be added with the format yyyy-mm-dd to end of the file name.

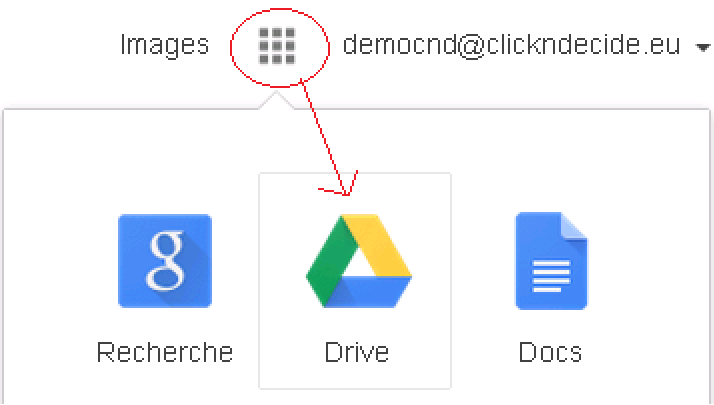
Export Google Doc Properties	
Google User	democnd@clickndecide.eu
Google Password	************
Collection	='/Public/' + SALNAME + '_' + AsSTring(FormatDateTime('yyyy-mm-dd'))

9. Save and close the **demo_multicriteria** report.
10. Export the **Report Training** report to PDF for the First Quarter 2015 for example.
11. Now **Sign In** to your Google Account:

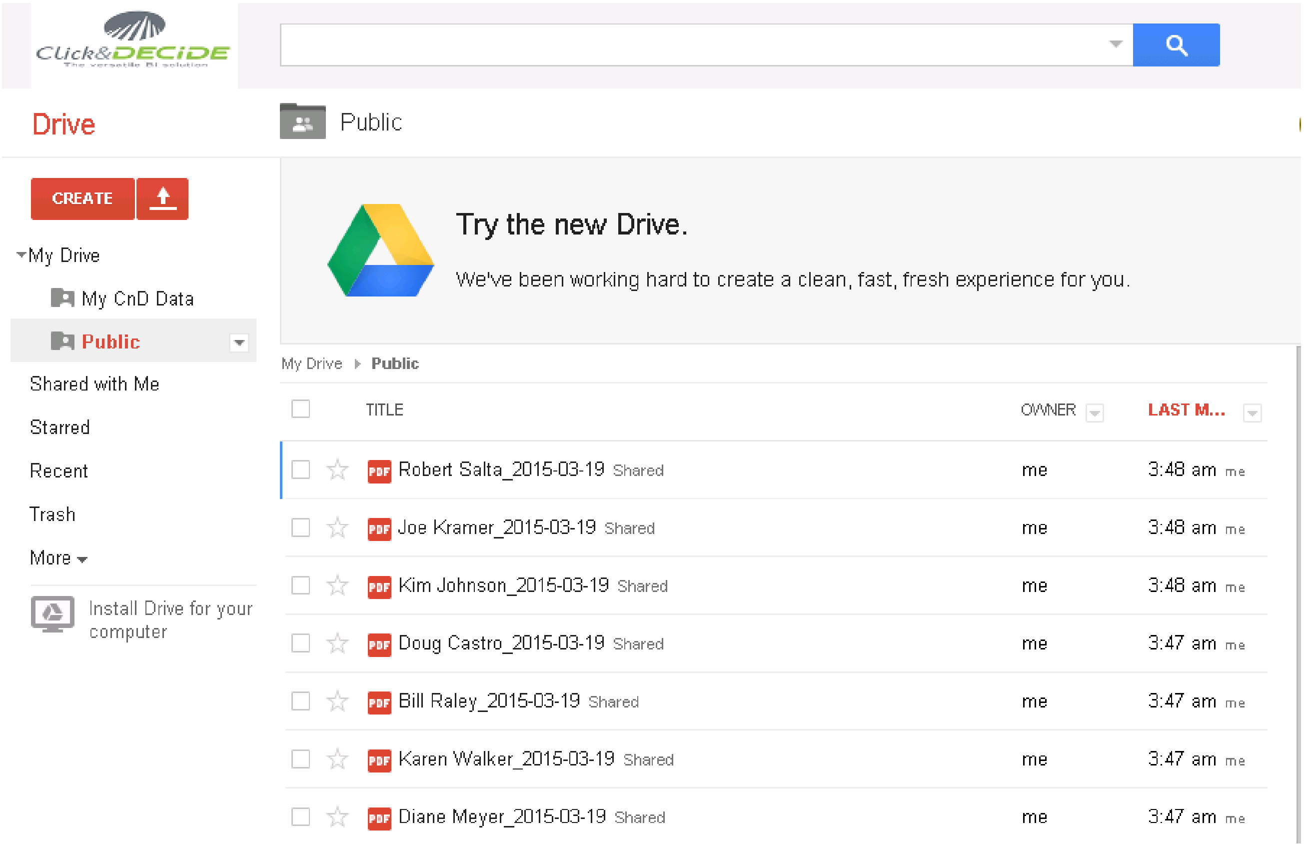


12. Select **Drive** through the **Application** icon:

Contact us: E-mail: support@clickndecide.com Tel: +33 (0)4 67 84 48 00
Headquarters: Click&DECiDE 130, rue du Baptistou - 34980 St Gély du Fesc, France.
To contact your nearest Click&DECiDE partner, click here.



13. Select in **My Drive** the **Public** drive:



As you can see in the above picture, among the 9 PDF created with an amount lower than 300000, only 7 Reports are corresponding to the **Google Doc Alert** with an amount lower than 100000.

2.2.6. Alert creating a RSS Feed record

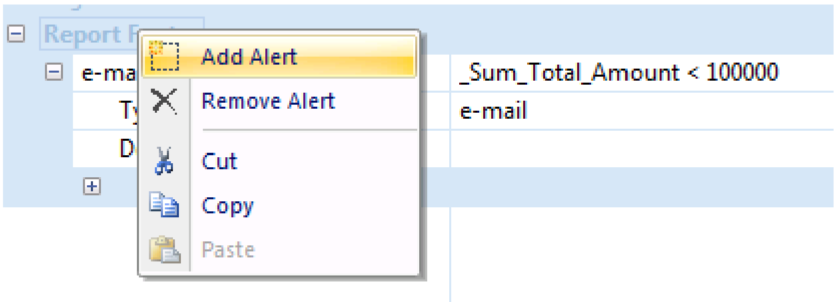
In the paragraph 2.2.2 “Alert sending an e-Mail”, the **demo_multicriteria** report was sending an e-Mail when the Alert was true, the Alert being the total amount for each Salesman lower than 100000.

Using the same report, the following steps explain how to create a **RSS Feed record** in the RSS Feed table used by the Click&DECiDE Event Manager. This record will be visible for any user who has **subscribed to the Click and DECiDE RSS feed**. The RSS Feed is thus added to the Feed Headlines gadget.

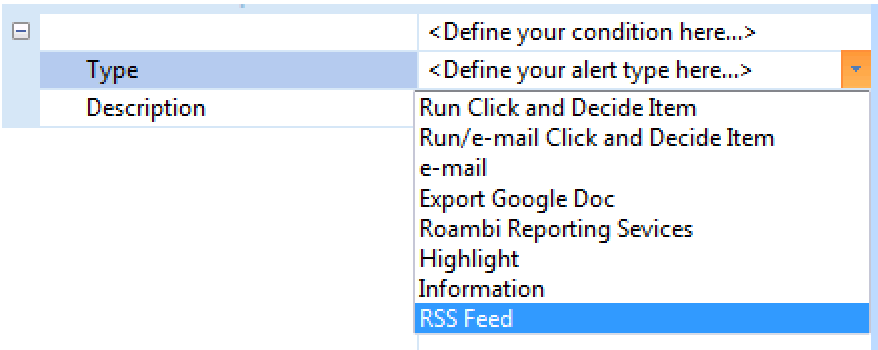
Refer to the Click&DECiDE Web Portal User Guide.pdf manual for more information about how to work with RSS Feed.

1. Open the report **demo_multicriteria**.
2. Click the **Report Footer** block and open the Alert Tab

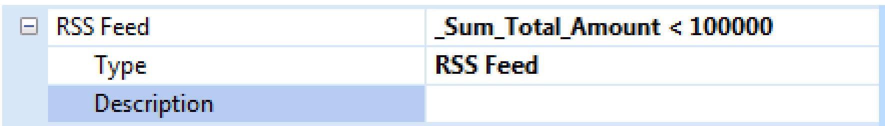
3. We can add another Alert on the same block to generate a **RSS Feed record**. Click on the **New Alert** icon or make a right mouse click and select **Add Alert**:



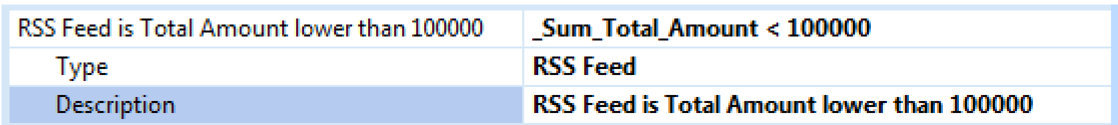
4. Select **RSS Feed** for the **Alert Type**:



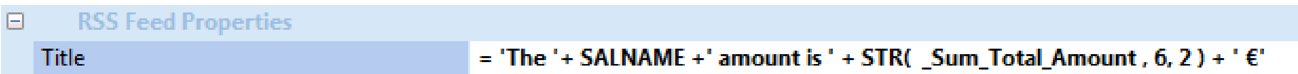
5. Enter the **Alert condition** using the same formula as the one defined for the e-mail alert



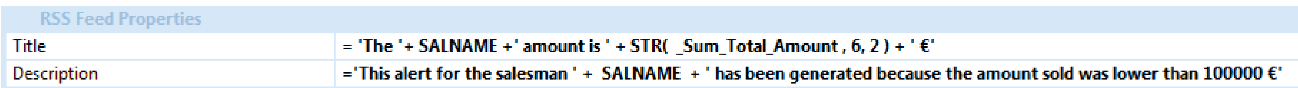
6. Enter a **Description** as for example RSS Feed if Amount lower than 300000



7. Feed now the **RSS Feed Properties**. Enter first the **Title**. It could be a dynamic formula such as *'The '+SALNAME+' amount is ' + STR(_Sum_Total_Amounl, 6, 2) + ' €'*



8. Enter an optional **Description** to be displayed in the tip near the link in the Click&DECiDE RSS Feed Title, for example the following formula: '*This alert for the salesman ' + SALNAME + ' has been generated because the amount sold was lower than 100000 €*



9. Enter the **URL** allowing to open, through the **Feed Headlines gadget**, the report created. To know this URL connect to the Web Portal and open the Shared Folder in the BAI Demonstration menu, then select any PDF report displayed in this directory. Make a right mouse click and select "Copy shortcut", then paste this URL in the URL box: It should be something like:

http://localhost/dvweb/Menus/Display.aspx?__ma=BAI+Demonstration&__mi=2317&__rp=DemoMultiCriteria_Diane+Meyer_0000.pdf

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Headquarters: Click&DECiDE 130, rue du Baptistou - 34980 St Gély du Fesc, France.
To contact your nearest Click&DECiDE partner, click here.

But the formula must refer to the dynamic SALNAME field and specify the Suffix used. Modify the formula as follow:

='http://localhost/dvweb/Menus/Display.aspx?__ma=BAI+Demonstration&__mi=2317&__rp='+FileName()

The **FileName()** function will build the correct file name including Salesman name and suffix used at the run time.

Note: The **localhost** has to be replaced with the IP Address or Server Name where Click&DECiDE Web Server is installed.

RSS Feed Properties	
Title	= 'The '+ SALNAME +' amount is ' + STR(_Sum_Total_Amount , 6, 2) + ' €'
Description	='This alert for the salesman ' + SALNAME + ' has been generated because the amount sold was lower than 100000 €'
Link	='http://195.168.0.95/dvweb/Menus/Display.aspx?_ma=BAI+Demonstration&_mi=2317&_rp=' + FileName()

10. Optional: you can enter a **Category** for this RSS Feed record. (Example: Information, Warning, Documentation, Brochures etc.)

RSS Feed Properties	
Title	= 'The '+ SALNAME +' amount is ' + STR(_Sum_Total_Amount , 6, 2) + ' €'
Description	='This alert for the salesman ' + SALNAME + ' has been generated because the amount
Link	='http://195.168.0.95/dvweb/Menus/Display.aspx?_ma=BAI+Demonstration&_mi=231
Category	**Warning**

11. Optional: specify the Users and/or the User Groups authorized to consult the created RSS Feed. Separate each item with a semicolon:

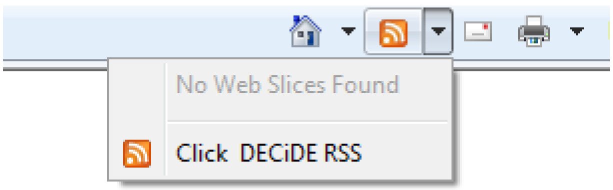
RSS Feed Properties	
Title	= 'The '+ SALNAME +' amount is ' + STR(_Sum_Total_Amount , 6, 2) + ' €'
Description	='This alert for the salesman ' + SALNAME + ' has been generated because the amount
Link	='http://195.168.0.95/dvweb/Menus/Display.aspx?_ma=BAI+Demonstration&_mi=231
Category	**Warning**
User	
Group	**Users;Domain users;Admin**

If no user or Group is specified, the default will be Everybody.

12. Save and close the **demo_multicriteria** report.

13. Export the **Report Training** report to PDF for the First Quarter 2015 for example.

You should receive new records in the **Click&DECiDE RSS Feed** table. Any user who has **subscribed to the Click and DECiDE RSS feed** should see in his Feed Headlines gadget the new information.



You also can open the Favorites and display the Feeds Tab and refresh the Click & DECiDE RSS:

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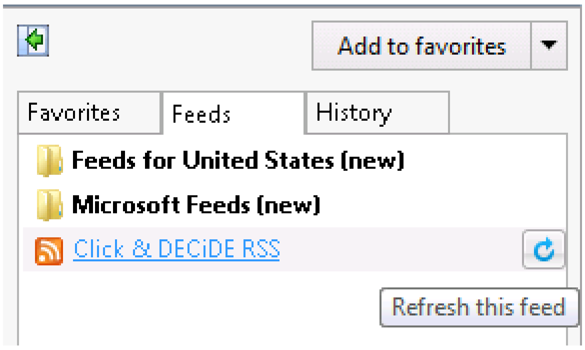
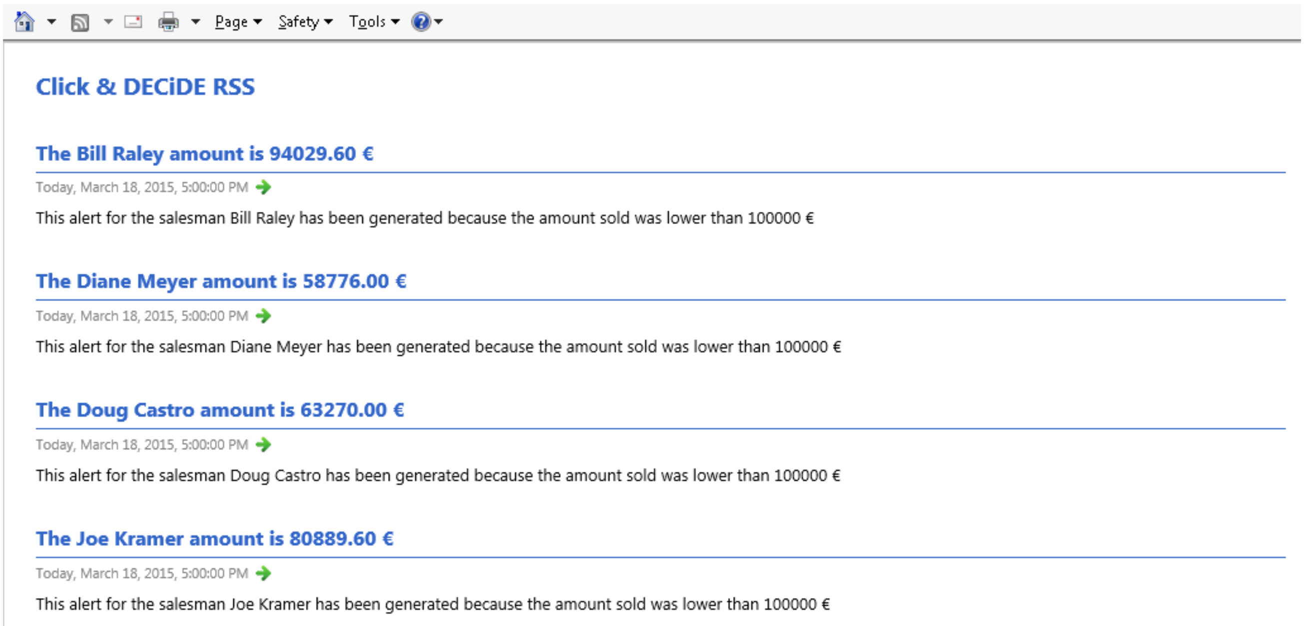
Headquarters: Click&DECiDE 130, rue du Baptistou - 34980 St Gély du Fesc, France.
To contact your nearest Click&DECiDE partner, click here.



To see how many new feeds are available:

If you click the link, you will see the 7 new feeds in detailed records: (the next picture only displays the 4 first records)

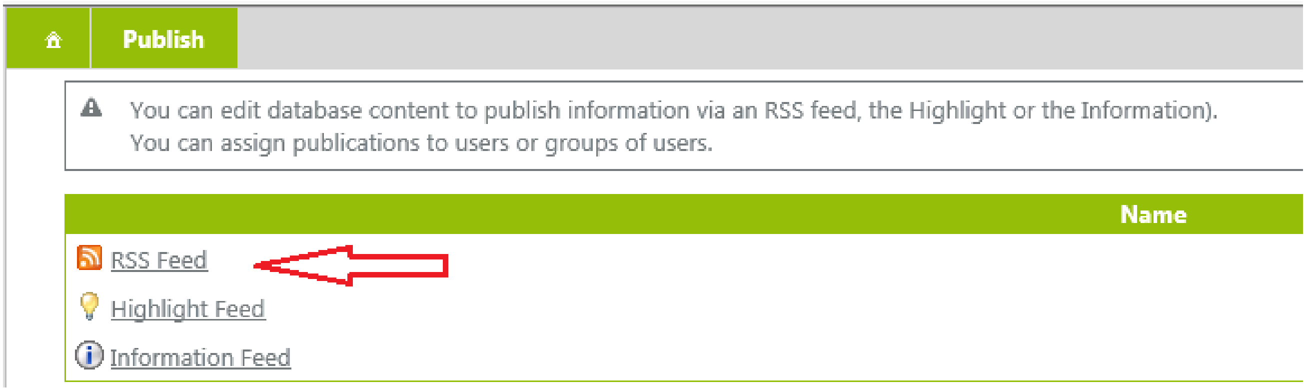


As you can see in the above example 7 records have been added for the 7 salesmen having an amount lower than 100000 €, among the 9 PDF reports created with the **Report Training** report. If you click a blue text, you can open the PDF report and see more details.

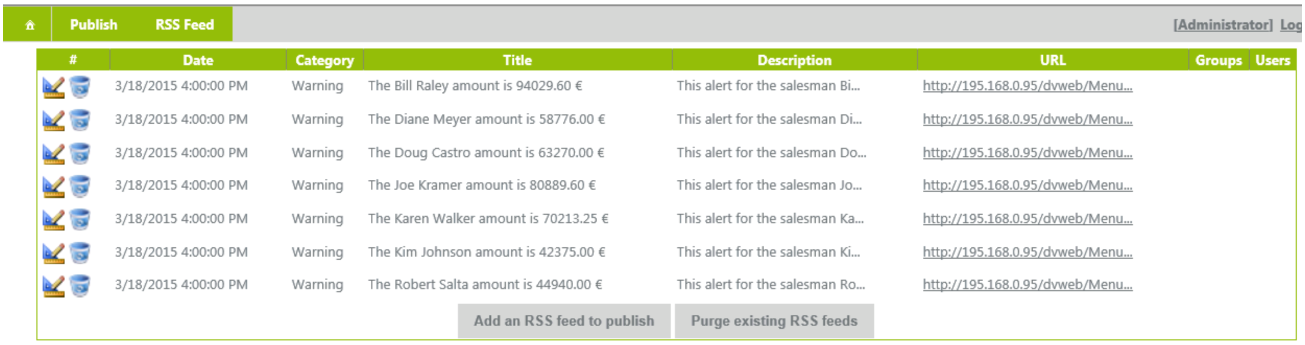
2.2.6.1. Checking if records have been added in the RSS Feed table

You would need sometimes to check if records have been sent to the RSS Feed Table. To do so:

1. Connect to the Click&DECiDE Web Portal as a user being Super Administrator or having the right to manage the Publish branch. (See the Administration Manager User Guide).
2. Click the **Publish** branch on the left pane
3. Click the **RSS Feed** level



4. Check on the right pane the existing records. Refer to the Click&DECiDE Web Portal User Guide for more information about how to edit or remove some records.



#	Date	Category	Title	Description	URL	Groups	Users
	3/18/2015 4:00:00 PM	Warning	The Bill Raley amount is 94029.60 €	This alert for the salesman Bi...	http://195.168.0.95/dvweb/Menu...		
	3/18/2015 4:00:00 PM	Warning	The Diane Meyer amount is 58776.00 €	This alert for the salesman Di...	http://195.168.0.95/dvweb/Menu...		
	3/18/2015 4:00:00 PM	Warning	The Doug Castro amount is 63270.00 €	This alert for the salesman Do...	http://195.168.0.95/dvweb/Menu...		
	3/18/2015 4:00:00 PM	Warning	The Joe Kramer amount is 80889.60 €	This alert for the salesman Jo...	http://195.168.0.95/dvweb/Menu...		
	3/18/2015 4:00:00 PM	Warning	The Karen Walker amount is 70213.25 €	This alert for the salesman Ka...	http://195.168.0.95/dvweb/Menu...		
	3/18/2015 4:00:00 PM	Warning	The Kim Johnson amount is 42375.00 €	This alert for the salesman Ki...	http://195.168.0.95/dvweb/Menu...		
	3/18/2015 4:00:00 PM	Warning	The Robert Salta amount is 44940.00 €	This alert for the salesman Ro...	http://195.168.0.95/dvweb/Menu...		

Add an RSS feed to publish | Purge existing RSS feeds

2.2.6.2. RSS Feed possible troubles:

1. If you get no new record in the RSS Feed table, it could be because no record matches the alert condition. Try again for another period and check the result in a preview in Click&DECiDE Builder.
2. If you get no new record in the RSS Feed table, it also could because the **Click and DECiDE Filter Engine Service** is not started
3. If you get no new records in the RSS Feed table, another reason could be a wrong formula in the URL box '*http://localhost/dvweb/Menus/Display.aspx?__ma=BAI+Demonstration&__mi=2317&__rp='+File Name()*. In that case consult the Event Viewer to see the error and check your formula.
4. If you get some records in the RSS Feed Table but they do not appear in the Feed Headlines gadget: the reason could be because you do not belong to an authorized User Group for this record. Try again modifying the authorized Users or User Groups, or leave blank to authorize everybody.

2.2.7. Remove an Alert

1. Select the required Alert in the concerned Block Report
2. Click the Delete icon in the Alert Tool Bar
3. Save the Report

2.2.8. Copy or Cut and Paste Alerts

1. Select the required Alert in the concerned Block Report
2. Click the Copy or Cut icon in the Alert Tool Bar
3. Select the destination block for this Alert
4. Paste the Alert with the Paste icon in the Alert Tool Bar

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3. Report Templates

When creating a new report, Click&DECiDE Builder provides a list of existing report templates as describe on chapter 1.1 Creating a new Report.

You also can create your own report templates and customize their presentation.

3.1. Creating a Template

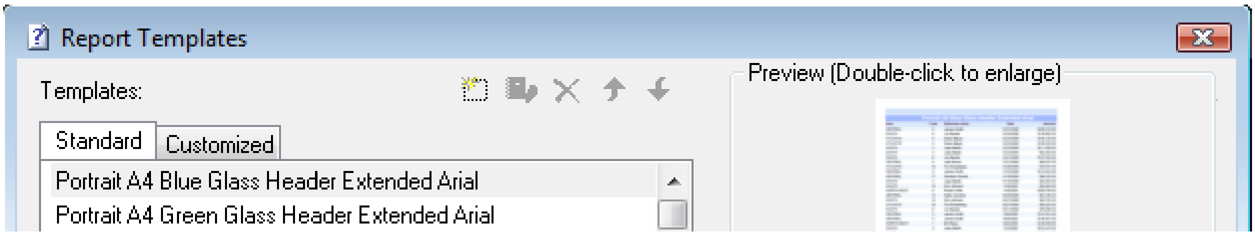
A template can also be designed from an empty report. In that case everything has to be defined: blocks used, logo, title, first field position for header and data, background picture, font and color etc.

A template can be designed from an existing report or template. In that case the new template memorizes all the information from the original report or template (visible or invisible blocks, title, picture or logo, background picture, font and color, first field positions etc…) and the user can add additional information.

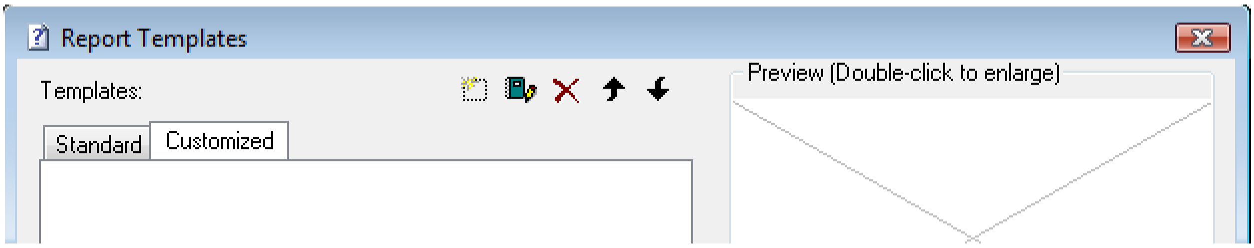
3.1.1. Creating a template from an empty report.

3.1.1.1. Required Blocks

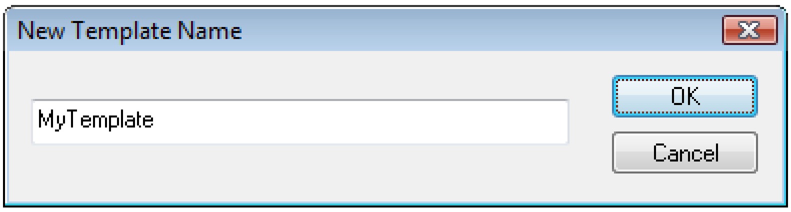
1. Do not open any report and use the command **Tools> Report Template**. The Report Template dialog box is opened with the Standard Tab selected by default.



2. Select the Customized Tab



3. Click the New icon and enter a **name** for this template and click **OK** to validate:



4. Enter an optional description about color, font etc., as a summary for this template, and specify if the block width and the block height can grow, and the horizontal and vertical field spacing. The image preview can be done later when any new report will be made using this template. The required picture has to be saved in the directory C:\Program Files\Click and DECiDE\BAI\Templates\Preview under the PNG format.

   Block Width Can Grow: if the user selects **Yes** in the **Block Width Can Grow** drop-down combo box then they authorize the block to be made wider if necessary (according to the number of columns that are inserted). If the user selects **No**, then columns will be inserted on two more rows as long as the user has selected to authorize the Block Height to grow.

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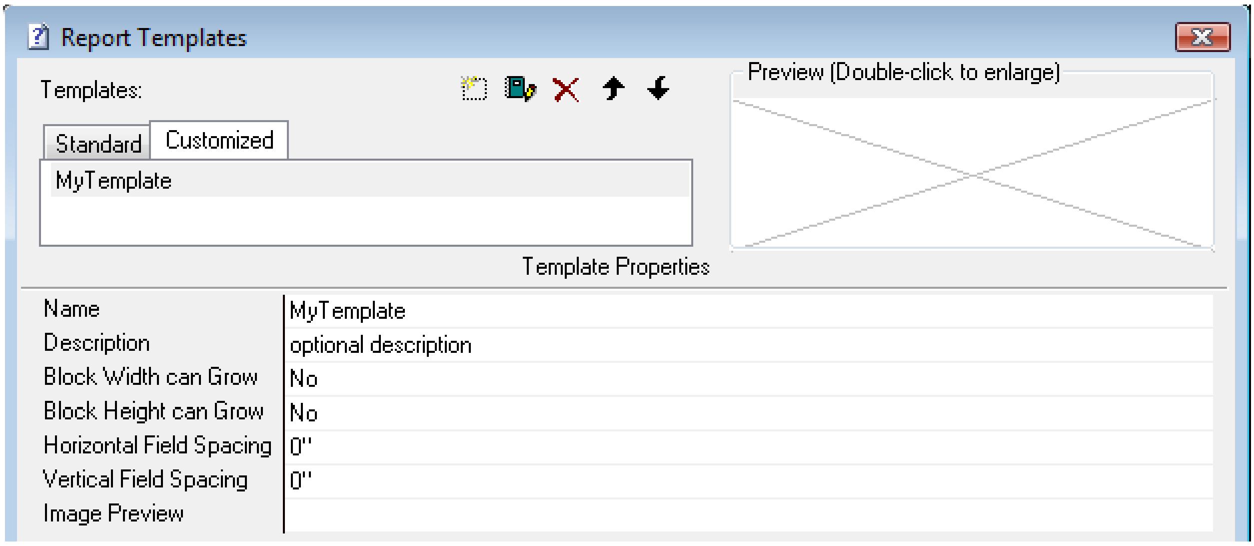
Block Height Can Grow: if the user selects **Yes** in the **Block Height Can Grow** drop-down combo box then they authorize the block to be made higher according to the number of rows that are inserted. If the user selects **No**, then columns will be inserted according to the height available or they will be inserted over a wider area if the user has selected to authorize the Block Width to grow.

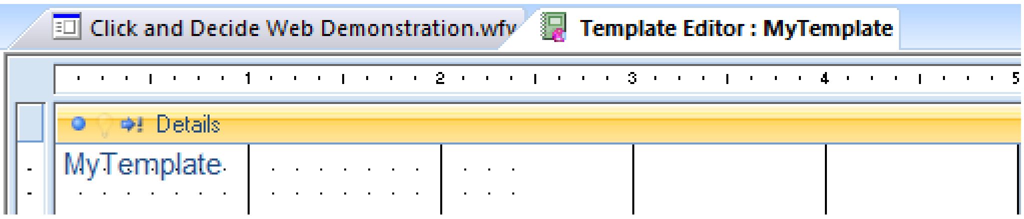
Warning: if the user has not authorized block widths and heights to grow then certain query fields may not be able to be automatically inserted in the report. The user will need to add them by hand.

Horizontal Spacing between Columns: defines the horizontal space between fields.

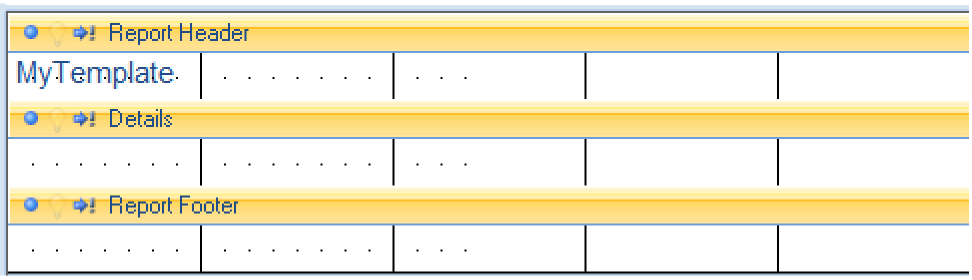
Vertical Spacing between Columns: defines the vertical space between two fields if they are on several rows.



5. Click the Edit icon: you get an empty report-template with only the default **Details** Block available:



6. Most of the time you will need a Report Header and Report Footer. To add the required block, click the command **View> Report Header/Footer**:



7. Most of the time you will also need a Page Header and Page Footer. To add the required block, click the command **View> Page Header/Footer**:

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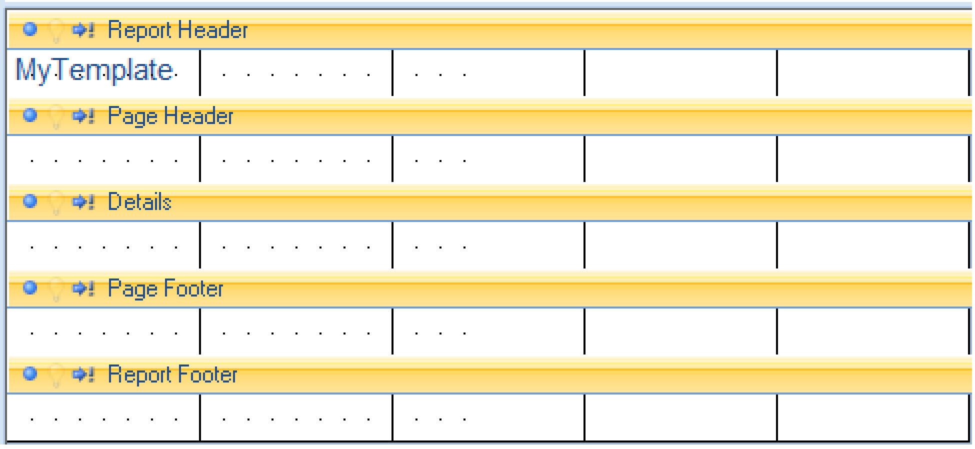


Note: No break level block can be defined in a report Template.

3.1.1.2. Template Fields

Certain template-specific fields can be defined in any block and must meet template item definitions displayed in a list when the user right-clicks on a template field or when they select the **Template Items** command. The template field list is the following:

Object's Visible Name (modifiable)	Internal Object Name (fixed)
Title 1	!Title1 or starting with !Title1
Title 2	!Title2 or starting with !Title2
First Header	!First_Header or starting with !First_Header
First Column	!First_Column or starting with !First_Column
Static Format	!Format_Static or starting with !Format_Static
String Format	!Format_Data or starting with !Format_Data
Number Format	!Format_Num or starting with !Format_Num
Date Format	!Format_Date or starting with !Format_Date
Time Format	!Format_Time or starting with !Format_Time
DateTime Format	!Format_DateTime or starting with !Format_DateTime
Line Format	!Format_Line or starting with !Format_Line

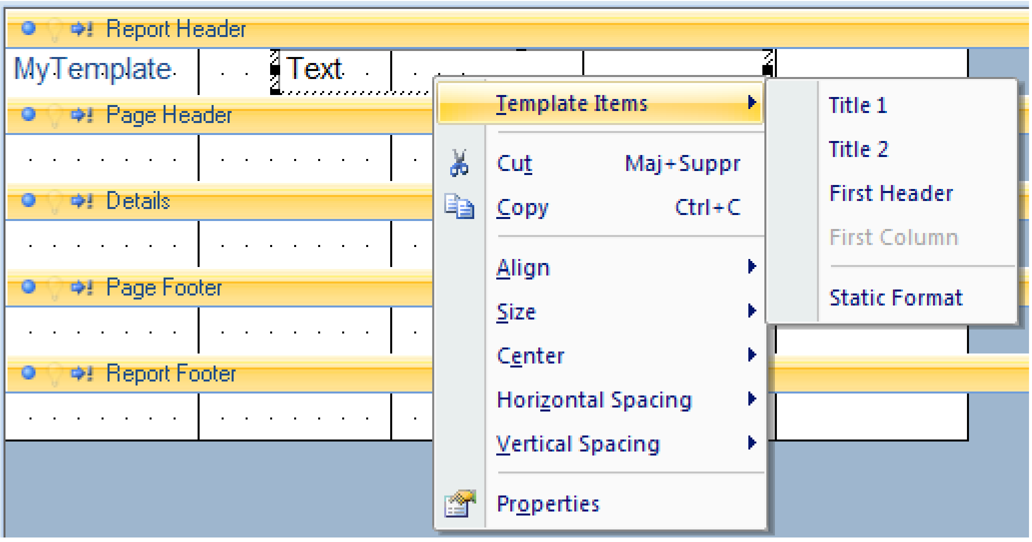
3.1.1.3. Title Fields

The field(s) must correspond to the proposed selection **Title 1** and/or **Title 2** and must have the internal names **!Title1** and **!Title2**. If two fields exist, they will be given the same title. Certain reports use two juxtaposed fields to give a shadow effect to the title.

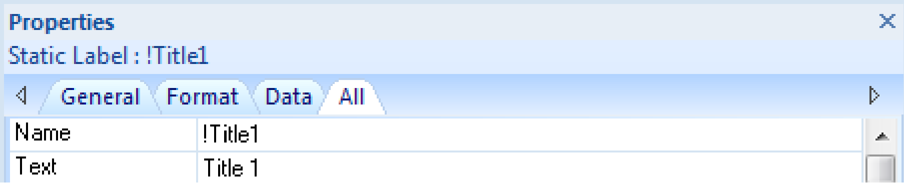
If the !Title1 or !Title2 fields do not exist, then no automatic title will be inserted in the report when it is created.

This field will be assigned the report title (by default the report name).

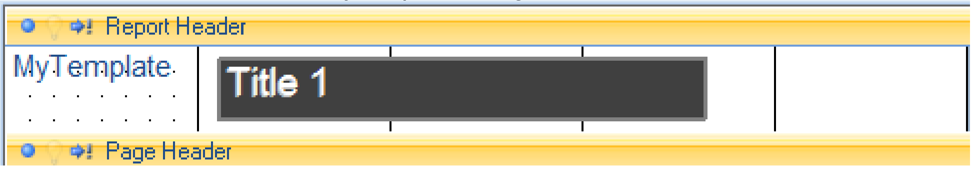
1. On the Report Header or Page Header blocks the following item list is displayed: (items that are already used or not applicable to the block will appear dimmed). Add a static label field in the Report Header block and right-click this field:



2. Select **Title1** on the right list. Automatically the internal name (not modifiable) will be !Title1 and the default visible Title (modifiable) will be Title1:



3. If necessary, repeat the procedure with a second label field in order to define a !Title2 field which will have the same title, but which will be juxtaposed to give a shadow or relief effect to the title:



3.1.1.4. First Header Field

This field will indicate the position of the first Column header in the block selected (Report Header or Page Header). It corresponds to the option **First Header** and has the following fixed internal name **!First_Header**. If the !First_Header field does not exist, then no automatic Column Header will be inserted in the report when it is created. If the field exists, then all the Report Header fields will be positioned horizontally from left to right based on the position of the **First Header** field and will be assigned with this field's attributes (font, font color, background color, character size etc...). If all the headers do not fit on one row then there are three solutions:

- The **Block Width can Grow** option is activated: the report width will be increased to ensure that all the headers which follow will be positioned on the same row.
- The **Block Width can Grow** option is deactivated but the **Block Height can Grow** option is activated: the report height will be increased to ensure that all the headers which follow can be positioned on a new row.
- None of the above options is activated: the headers which follow will not be inserted in the report and will therefore be missed out.

1. Add now a static label field in the Page Header block and right-click this field:

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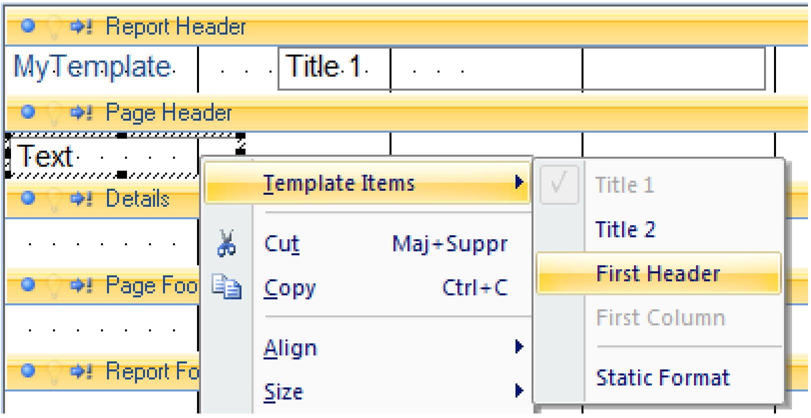
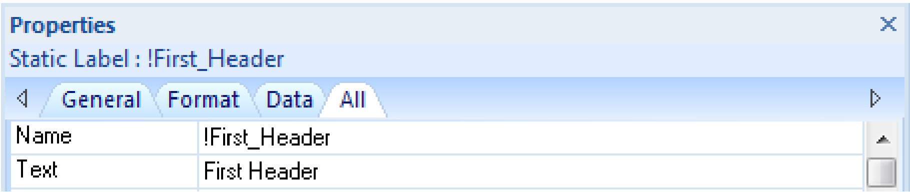


2. Select **First Header** in the right list. Automatically the internal name (not modifiable) will be !First_Header and the default visible header (modifiable) will be First Header:



3.1.1.5. First Column Field

This field indicates the position of the first Data Column in the block selected (in general the Detail block). It corresponds to the **First Column** option and has the following fixed internal name **!First_Column**. If the !First_Column field does not exist, then no Data field will be automatically inserted in the report when the report is created. If the field exists, then all the report's data fields will be positioned horizontally from left to write based on the position of the **First Column** and will be assigned with attributes according to the following rules:

- If the query columns were assigned specific formats (number, date, datetime etc…), then the format of each column in the report will be the same format as the one defined in the query for the column in question. The column width in the query's data grid will also be used in the report.
- If the query columns (or certain columns) have not been assigned with a specific format (number, date, datetime etc…), then the format of the report's columns will be either the one defined by Windows by default (number, date etc…), or the format defined in the model according to the table included above, that is all the fields with the internal names !Format_Data, !Format_Num, !Format_Date, etc.

If all the data fields do not fit on a single row then there are three solutions:

- The **Block Width can Grow** option is activated: the report width will be increased to ensure that all the columns which follow will be positioned on the same row.
- The **Block Width can Grow** option is deactivated but the **Block Height can Grow** option is activated: the report height will be increased to ensure that all the columns which follow can be positioned on a new row.
- None of the above options is activated: the columns which follow will not be inserted in the report and will therefore be missed out.

1. Add now a data or formula field in the Details block and right-click this field:

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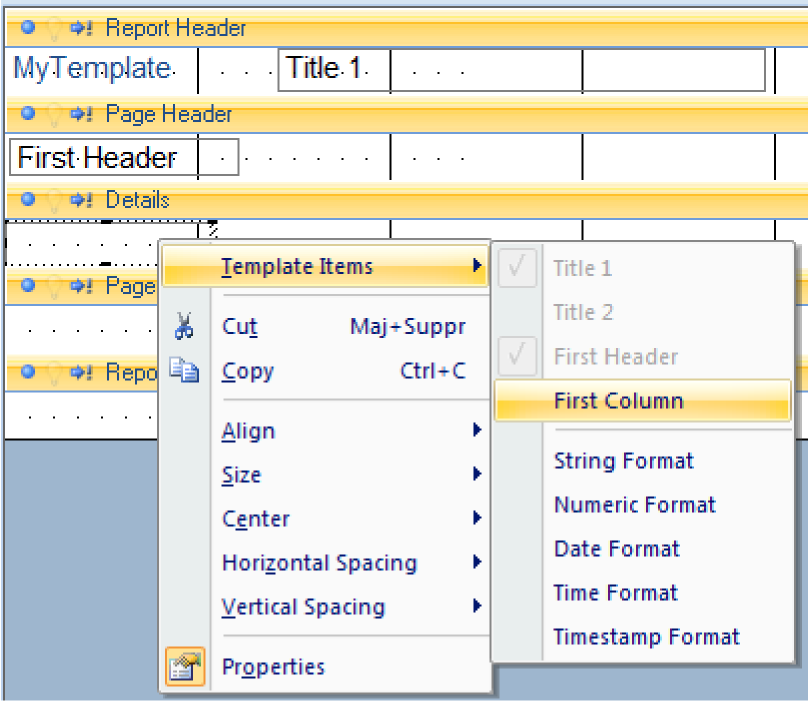
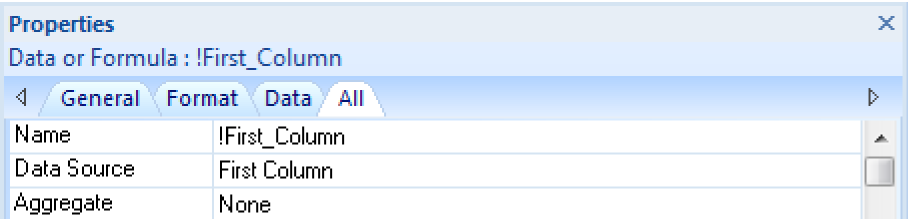


2. Select **First Column** in the right list. Automatically the internal name (not modifiable) will be !First_Column and the default visible data source name (modifiable) will be First Column:



3.1.1.6. Column Format Field

As mentioned in the previous paragraph **First Column Field**, the format of fields inserted in a report follows the priority of each corresponding column of the query.
However, if no specific format has been defined in the query, then the user can define default values to use when creating a report via a Template.
The user can add fields whose position is not important but whose format will be taken into account, if it is not defined in the query. These additional fields are optional.
These fields will remain invisible in the reports created using a Template and they are only used to indicate formats and other attributes to use (color, font, character size etc… when creating a report but also when adding additional columns to a report at a later date.
It may be necessary to add a static field (label), a dynamic field (data or formula) or a separator (line) to a report. They will be named as follows:

- **!Format_Static** – For text or label items.
- **!Format_Data** – For alphanumeric data items.
- **!Format_Num** – For number data items.
- **!Format_Date** – For Date data items.
- **!Format_Time** – For Time data items.
- **!Format_DateTime** – For Datetime data items.
- **!Format_Line** – For Line items.

If an item is added to a block in a template-based report at a later date Click&DECiDE Builder will search for an information field in the template which corresponds to the data type and will assign the attributes and formats defined in the Template.

A block can only contain one field for one data type. For example, if the user defines a !FormatDateTime field in the detail block, then this block cannot contain another Datetime format field. However, it is possible to copy this field to the Report Header block to define another Datetime format for the block. In this case, the field's internal name will begin with !FormatDateTime (for example !FormatDateTime2).

Field Search Rules

If the !Format_xxxxx field is not found in the corresponding block in the template, then Click&DECiDE Builder will search in the template's **Details** block.

If the !Format_xxxxx field was not found in the template's Details block either, then ClicknDECiDE Builder will either search for a Text/Label in the **!First_Header** field or search for Data/Formula in the **!First_Column** field in the corresponding block in the template.

Note: at this stage the essentials have been defined, the formats for each column will respect the default rules (Query column formats, or windows default values, or additional field formats specifically designed for this purpose, see the next step).

It is now possible to save the new **Template**, then close it and close the **Report Template** window by clicking the **Close** button. Open a query, create a new report and select the template that was just created in order to test it.

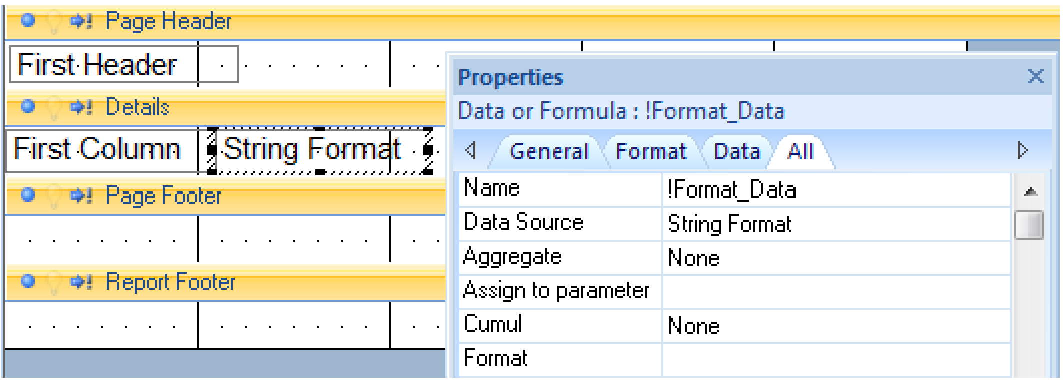
To modify the template, select **Tools> Report Templates** and edit the template concerned.

3.1.1.7. Additional Field Format

Define Additional Field Formats to use when **modifying** a report (when adding items at a later date) or when **creating** a report if the query columns have not been assigned a specific format. **Important**: the position of these fields is not important, since only their attributes and formats will be used according to the data types concerned.

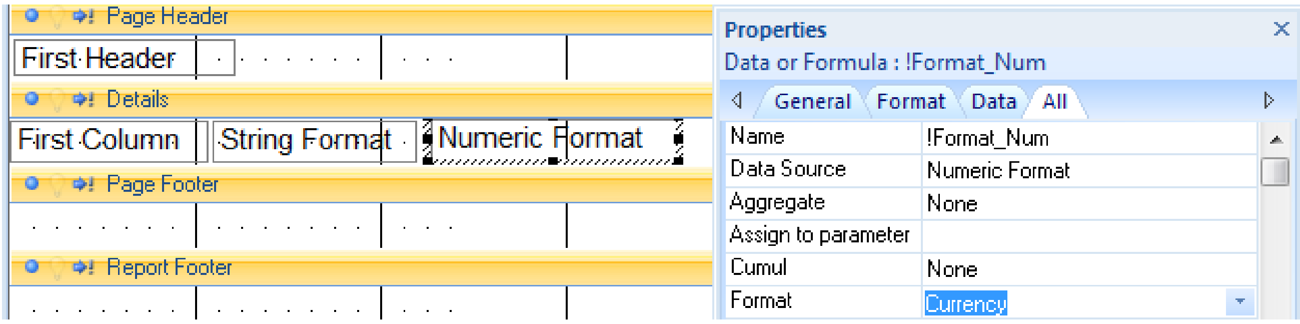
3.1.1.8. Dynamic Fields in the Details Block

For example, in the previous Template place a **Data/Formula** field in the **Details** block then right-click and select **String Format** from the list of items displayed.
Define the attributes for this alphanumeric field which does not have a specific format except that it is aligned to the left and define the size, font, font color and background you wish. Note the field's internal name will be !Format_Data:

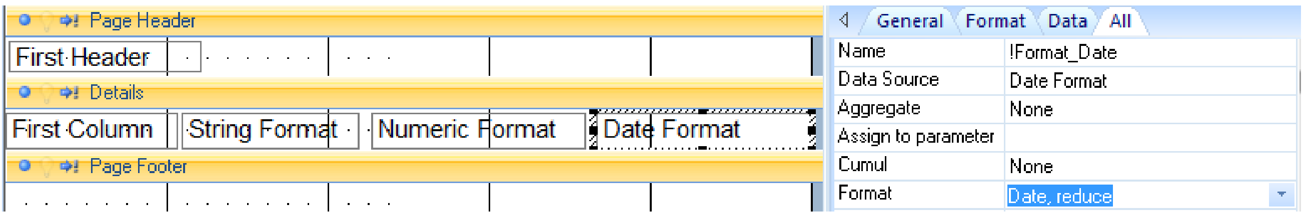


In the same example, place a new **Data/Formula** field in the **Details** block then right-click and select **Number Format** from the list of items displayed.

Define the attributes for this number field which should be aligned to the right, specify the size, font, font color and background as well as the number format to use (for example the format proposed by Windows or a customized format such as # ###,##). Note that the field's internal name will be !Format_Num:

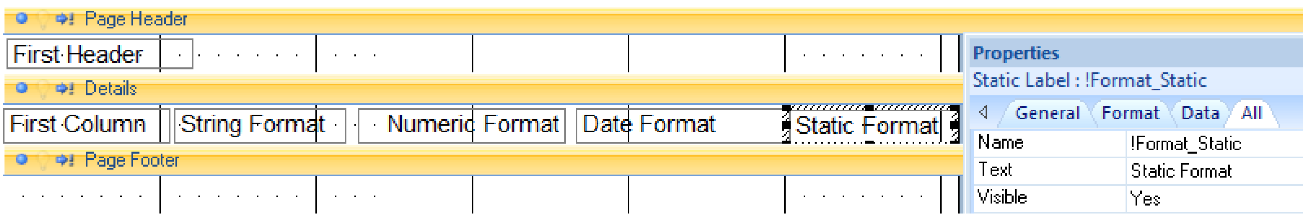


In the same example place a new **Data/Formula** field in the **Details** block then right-click and select **Date Format** from the list of items displayed.
Define the attributes for this Date type field which should, for example, be aligned to the left, specify the size, font, font colour and background as well as the Date format to use (for example the format proposed by Windows or a customized format such as dddd dd mmmm yyyy). Note that the field's internal name will be !Format_Date:



3.1.1.9. Static Fields in the Details Block

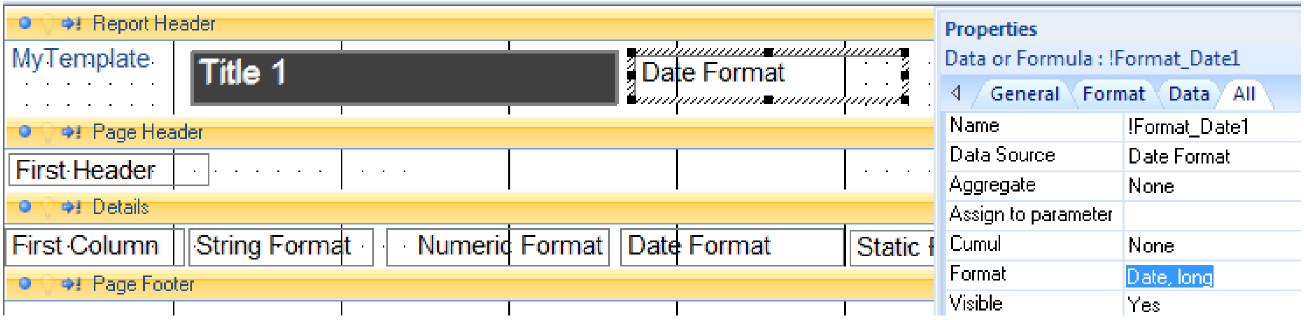
If a **Text/Label** type item is added to the **Details** block at a later date it is also possible to predefine default attributes. For example, to do so, place a **Label** type field in the **Details** block then right-click and select **Static Format** from the list of items displayed.
Define the attributes for this Static field which should, for example, be aligned to the left, specify the size, font, font color and background. There is no format to define for Static fields. Note that the field's internal name will be !Format_Static



3.1.1.10. Dynamic Fields in a Header Block

If a **Data/Formula** type item is added to the **Report Header** or **Page Header** blocks at a later date it is also possible to predefine default attributes and formats to be applied. For example, to do so, copy (or create if these fields have not yet been defined) all the fields managing formats from the **Details** block to the **Page** Header block.

Note that objects' internal names are duplicated and end with a number to avoid doubles. For example the !Format_Num field will be copied as !Format_Num2, the !Format_DateTime field will be duplicated as !Format_DateTime3 etc.



These keywords will be recognized by the software since they start with the reserved syntax !Format_Data, !Format_Num, !Format_Date, !Format_Time, !Format_DateTime and !Format_Static.

3.1.1.11. Static Format in Header Blocks

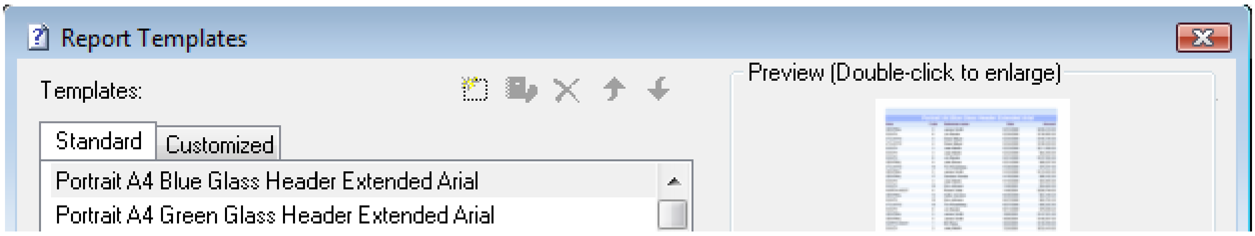
If the user adds a **Text/Label** type item in a **Header** block at a later date, it is also possible to predefine its attributes by default (however, if the **First Header** field exists, its attributes will be used by default). For example, to do so, place a **Label** type field in the **Header** block, right-click and select **Static Format** from the list of items proposed.

Define the attributes of this static field which the user could, for example, align to the left, select the size, font, font color and background. There is no need to define a format for a Static field. Note that this field’s internal name will be !Format_Static or will begin with the text !Format_Static if the same kind of field already exists in the Details block.

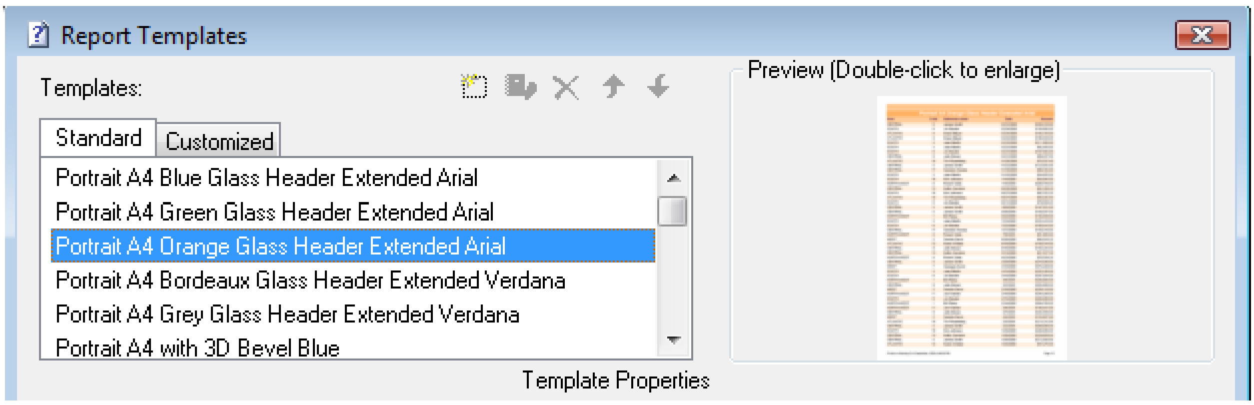
3.1.2. Creating a template from an existing template.

You also can create a new template starting with an existing template and then modify some attributes such as the font, color, logo etc.

1. Do not open any report and use the command **Tools> Report Template**. The Report Template dialog box is opened with the Standard Tab selected by default.



2. Select in the list the existing template you wish to use, for example the “Portrait A4 Orange Glass Header Extended Arial”



3. Click the New icon and enter a **new name** for this template and click **OK** to validate:

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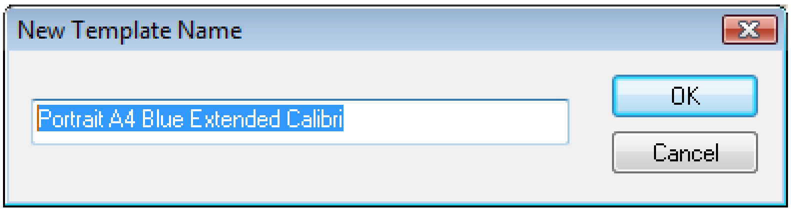
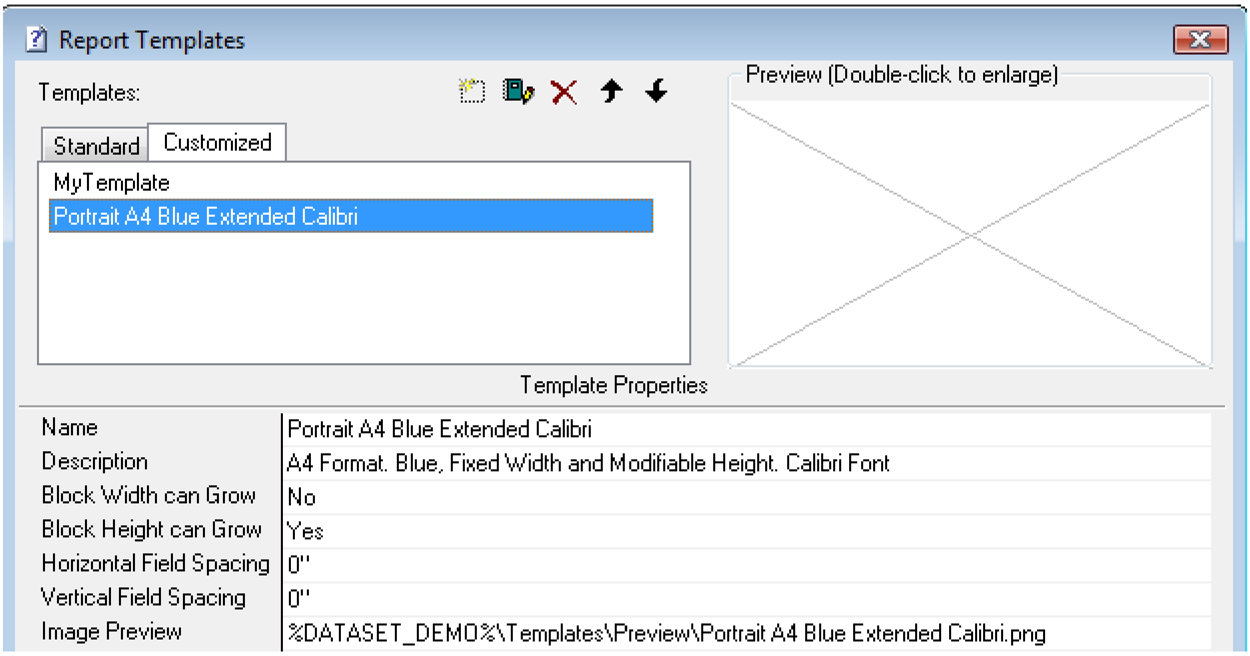
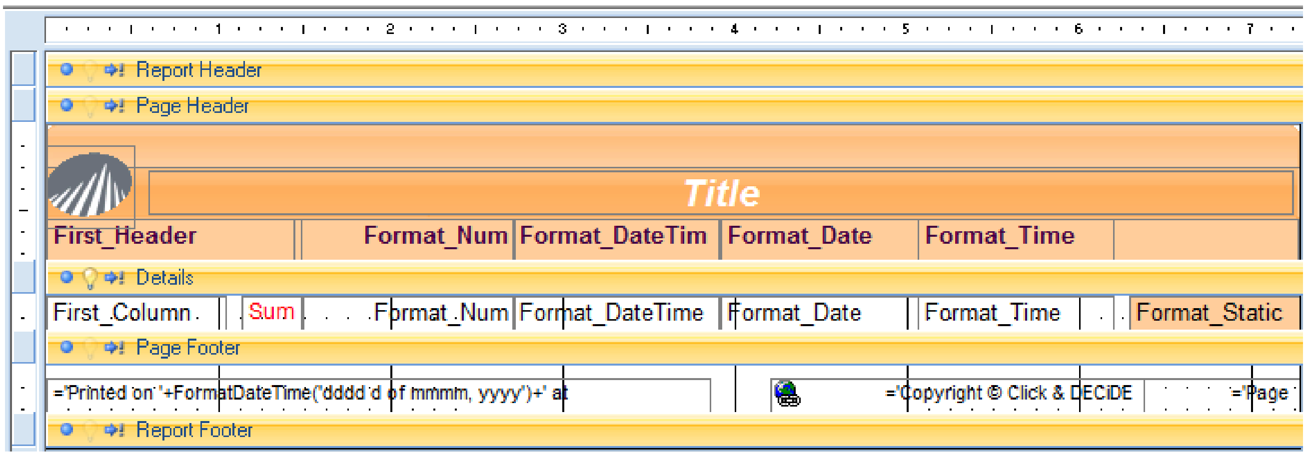


4. Automatically the new template appears in the Customized Tab with the new name: modify the description and other attributes if needed (block properties, field spacing and picture name). The image preview can be done later when any new report will be made using this template. The required picture has to be saved in the directory C:\Program Files\Click and DECiDE\BAI\Templates\Preview under the PNG format.



5. Click the Edit icon: you get a new template based on the selected existing template:



As you can see all Template fields already exist. Change now the attribute you need such as a blue color, a new logo, the Calibri font, the Copyright information etc.

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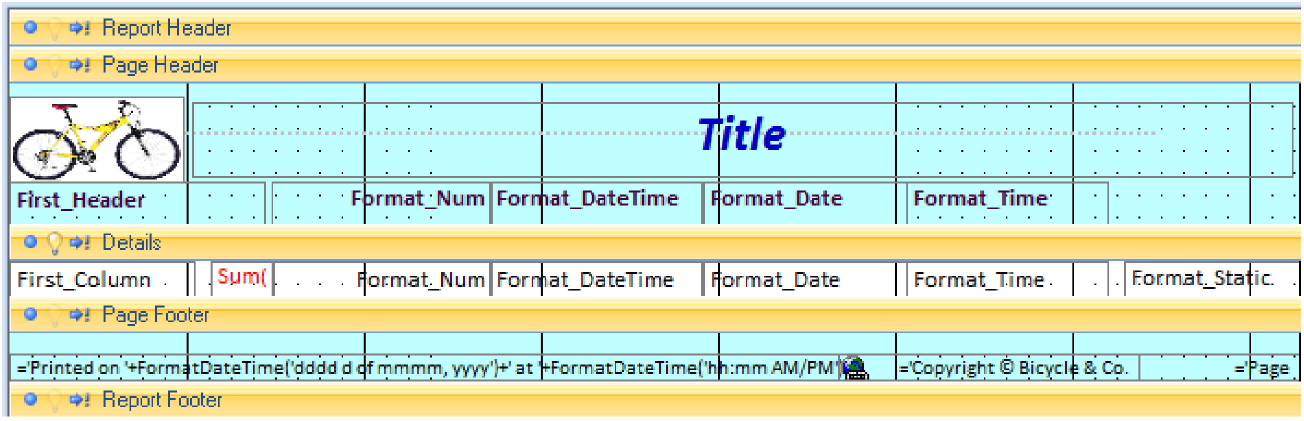


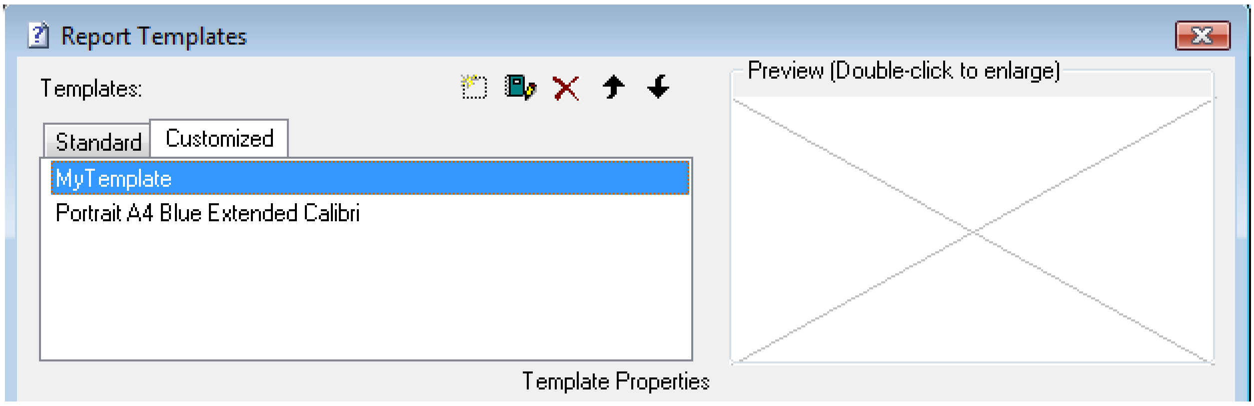
Save and close this new template and create a new report from a query to test the result.

Refer to the paragraph 3.1.1 Creating a template from an empty report for more information about the Template Fields and other template attributes.

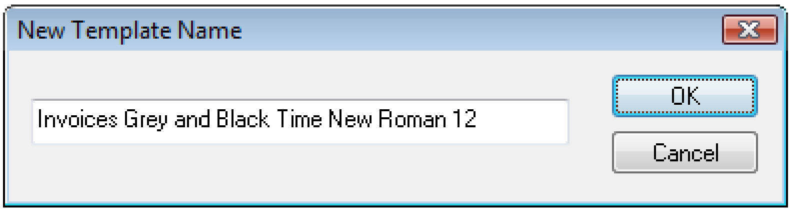
3.1.3. Creating a template from an existing report.

You also can create a new template starting with an existing report and then modify some attributes such as the font, color, logo etc.

1. Open the required report, Invoices for example, and use the command **Tools> Report Template**. The Report Template dialog box is opened with last used Tab by default.
2. Select the Customized Tab.



3. Click the New icon and enter a **new name** for this template and click **OK** to validate:



4. Modify the Description and other attributes, such as block and field spacing:

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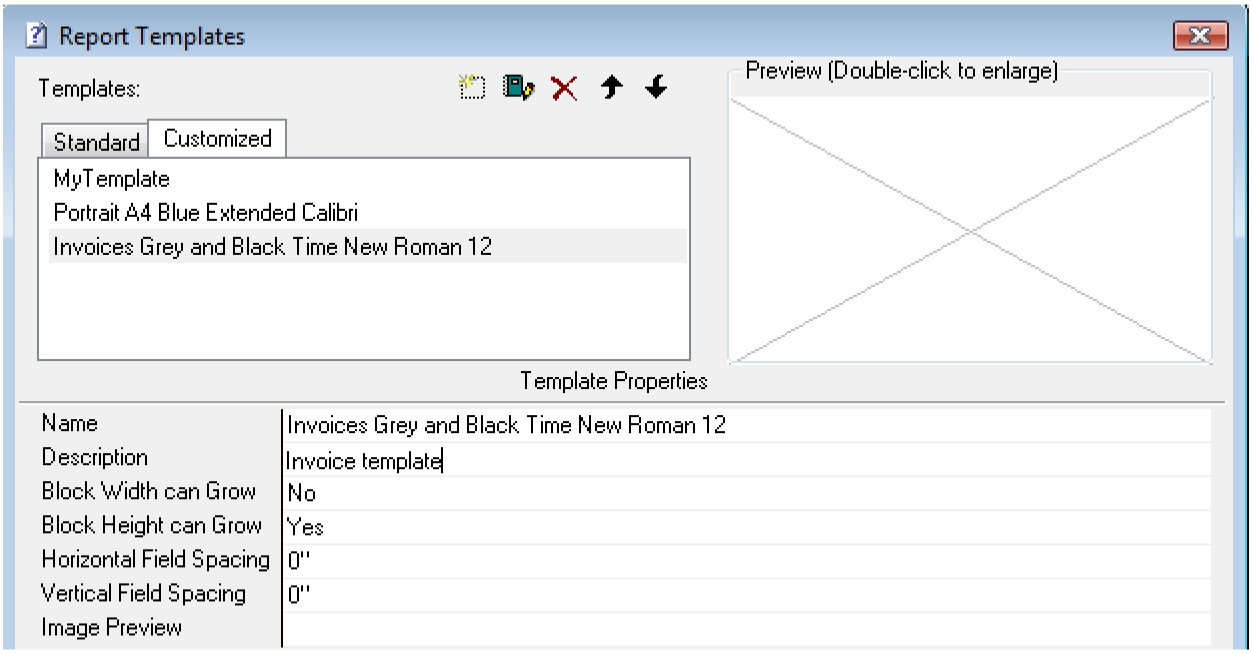
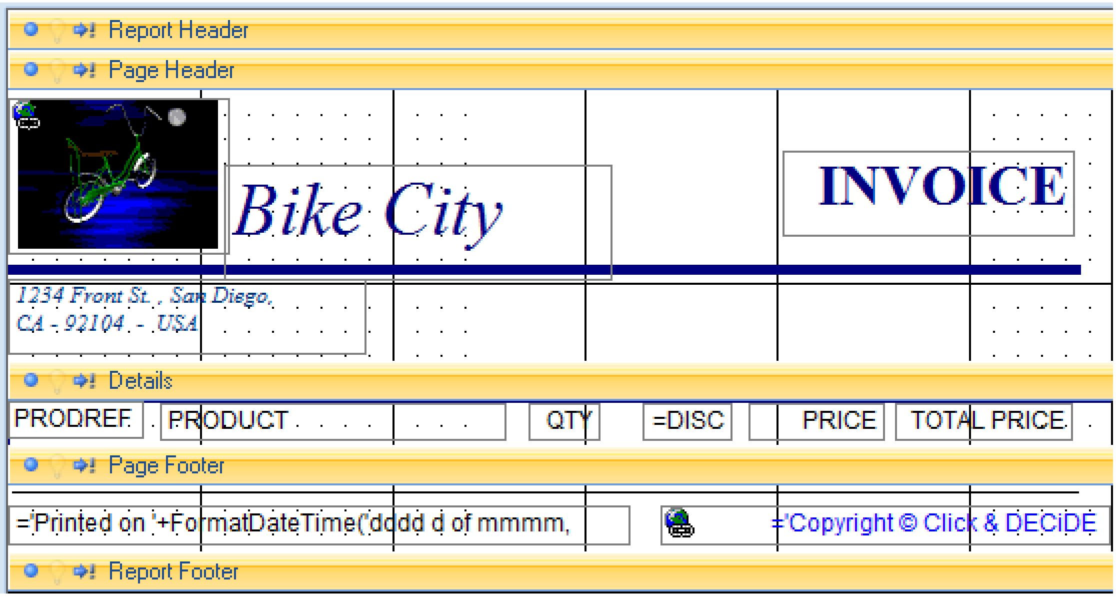


5. Click the Edit icon: you get a new template based on the selected existing report:



6. Define the template **Title field**: right-click on the INVOICE Title and select **Template Items> Title1**

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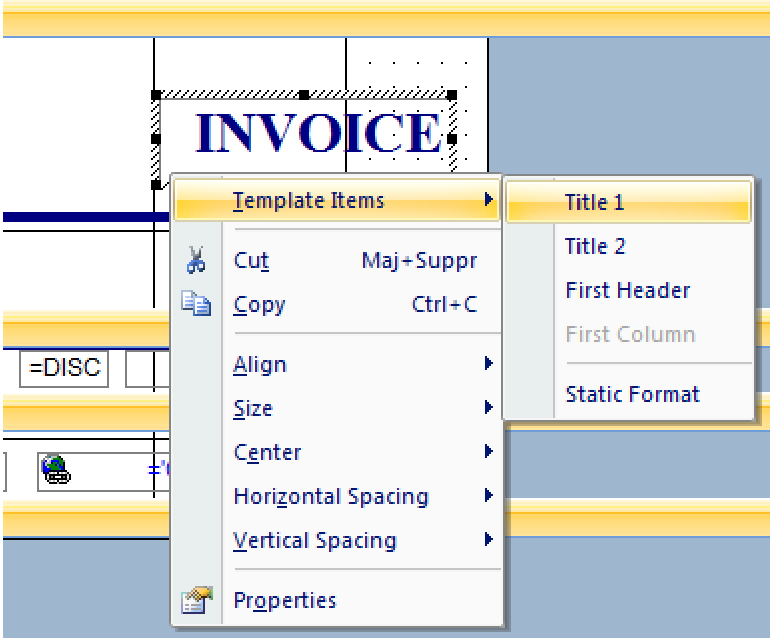
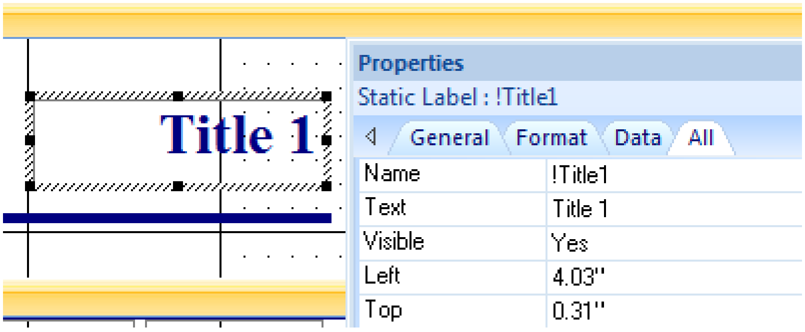
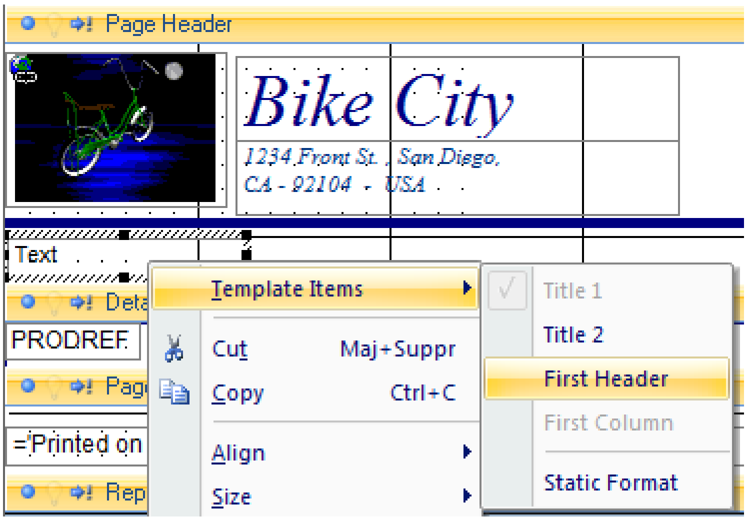


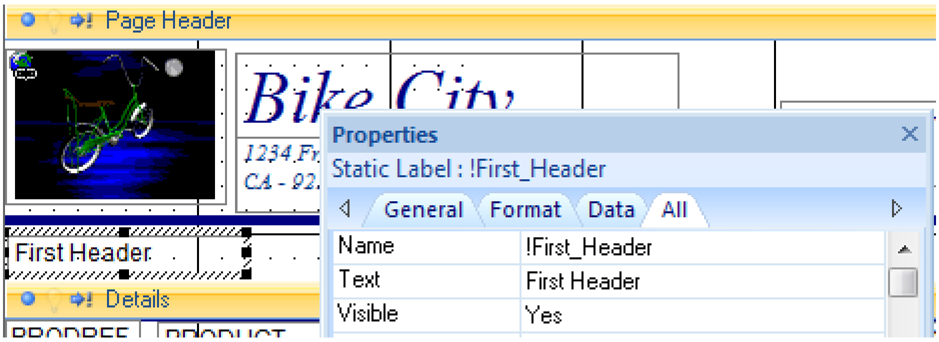
7. The **Title** field position is now define with the keyword !Title1 in the Report Header block.



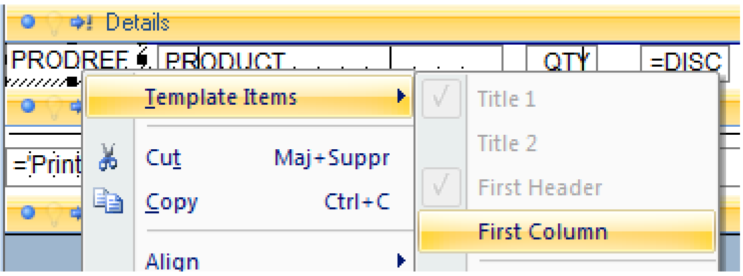
8. Add a Static Label field in the Page Header Block and define the first **Header** column position:



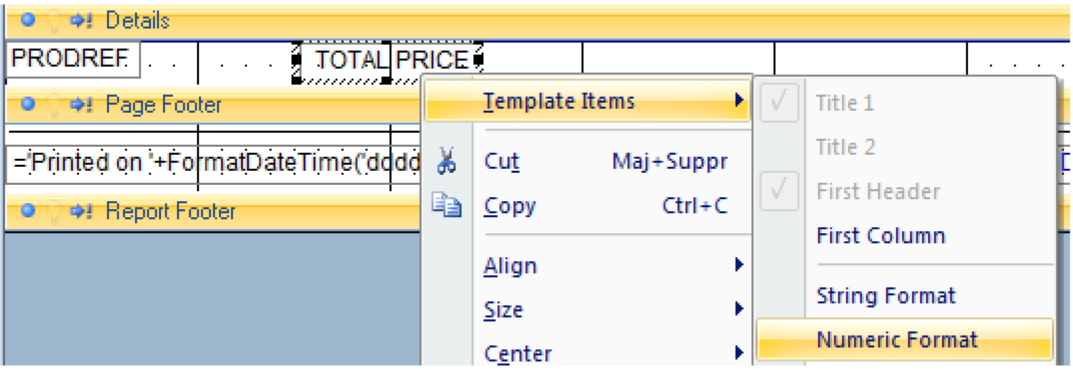
9. The **first Header Column** position is now defined with the keyword !First_Header:



10. Define the **first data column** position in the Details block: right-click the first field and select **Template Items> First Column**:



11. Remove unnecessary fields in the Details Block and, optional, define, if needed, a numeric format for a numeric field (if no format is defined, the query column format will be used):



12. Save and close the new template.
13. Create a report from a query using this new customized template to test it.

3.2. Saving Templates

Save the modifications made and close the Template Editor. The Template's design is now terminated and can be used when creating new reports.

Note that the customized templates are saved in the D7MODELS.D7 file located is in the `C:\ProgramData\Click and DECiDE\BAI\Templates` directory. It is recommended to perform a backup from time to time and in particular before installing an update or a new version of Click&DECiDE Builder, even if this file is never overwritten.

Note also that the standard Templates installed by Click&DECiDE are in the file D7MODELSSTD.D7 located is in the `C:\ProgramData\Click and DECiDE\BAI\Templates` directory. This file can be overwritten when installing a new Click&DECiDE version. Standard templates are not modifiable.

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4. Report Book

When creating a new report, Click&DECiDE Builder allows you to create a Report Book.

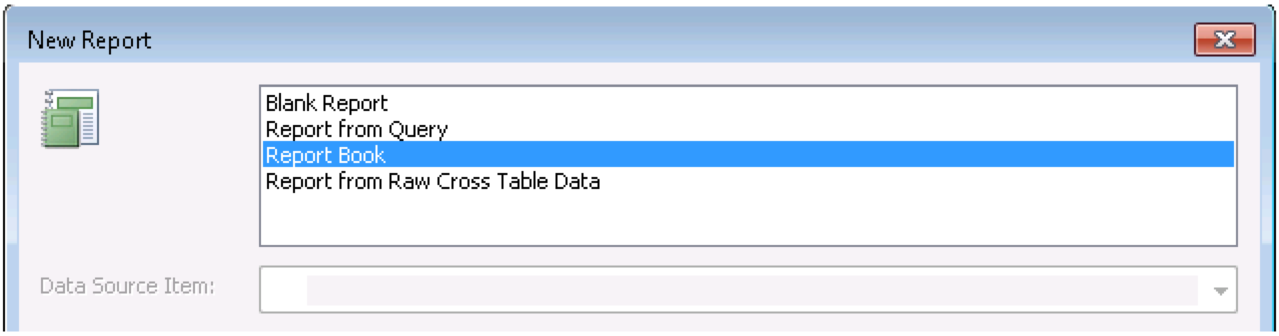
A Report Book is a collection of several reports you want to be printed together.

Note: a Report Book can then be printed to printer, exported to HTML or PDF locally or to Click&DECiDE Web Server. A Report Book cannot be exported to another Click&DECiDE Builder output format.

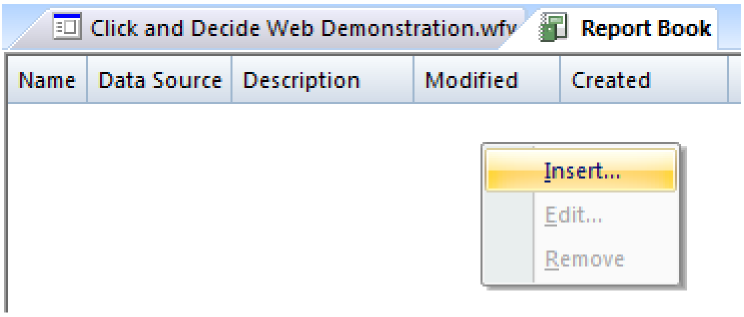
4.1. Create a Report Book

To create a new report book, follow the next steps:

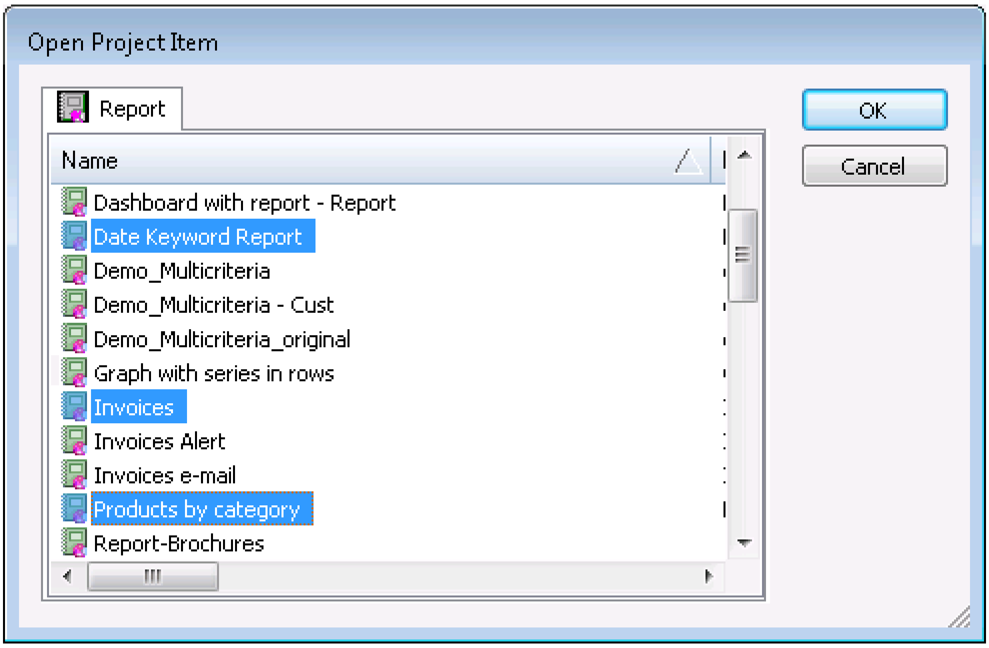
1. Click the New Report icon or click the command **File> New> Report** and select the Report Book option in the list, then click **OK** to validate:



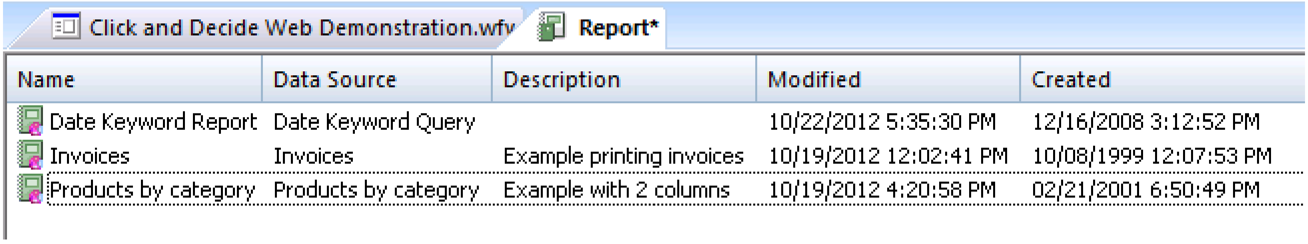
2. In the proposed empty window, right-click and select **Insert…**



3. Select the reports you need to be included in this Report Book, using Shift+Click or Ctrl+Click and click **OK** to validate:

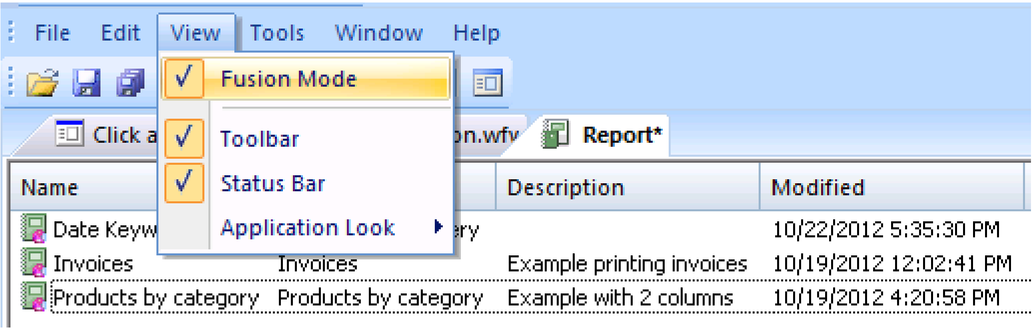


4. The selected reports are added in the Report Book in the order you have chosen:



Note: you can move a report from a location by selecting this report with the mouse, keep the left mouse button pressed, move to the new location and release the mouse button.

5. Click the command **View** to modify if needed the **Fusion Mode**:



When **Fusion Mode is enabled**, the page number for all included reports will merge all pages from all reports from 1 to the total number of pages. Example:

Report 1 generates 3 pages

Report 2 generates 5 pages

Report 3 generates 2 pages

Then the Report Book will generate 10 pages, with page number starting at 1 and ending at 10.

When **Fusion Mode is disabled**, the page number for all included reports will be the same as the one used if each report was alone. Example:

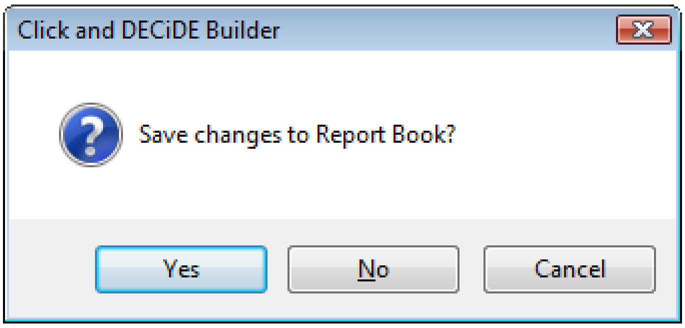
Report 1 generates 3 pages

Report 2 generates 5 pages

Report 3 generates 2 pages

Then the Report Book will generate 10 pages, with page number starting at 1 and ending at 3 for the first report, then page number starting at 1 and ending at 5 for the second report, then page number starting at 1 and ending at 2 for the third report.

6. Close the Report Book and click **Yes** to validate:



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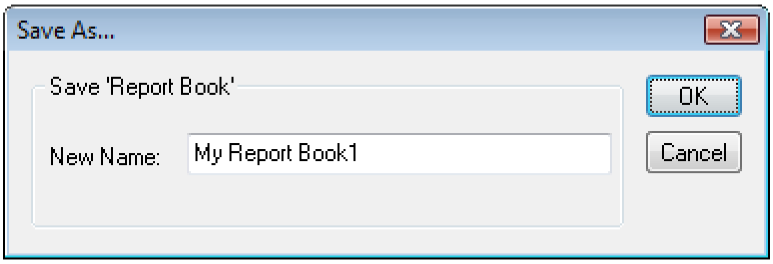
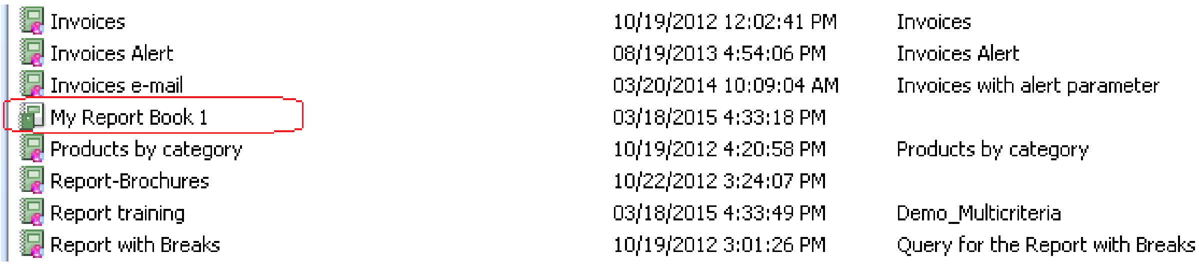
7. Enter a name for the new Report Book and click **OK** to validate:



8. The new Report Book will appear in the Click&DECiDE project file, among the other reports but with a distinct icon:



9. Run the Report Book into a PDF format for example and check the result. Each report will prompt the criteria dialog box if needed. If a parameter for criteria is used by several reports inside the same report book, the question will be displayed only one time. If you run this report book through the Web Portal, you will get a global criteria list for all criteria of all reports in one screen.

4.2. Modify a Report Book

If you wish to add (or remove) any report in a Report Book, do as follow:

4.2.1. Remove a report from a Report Book

1. Double-click the Report Book to open it.
2. Select the report to be removed. You can select several reports using Shift+Click or Ctrl+Click.
3. Click the **Del** key.
4. Close and save the Report Book.

4.2.2. Add a report in a Report Book

1. Double-click the Report Book to open it.
2. Select the report in front of which you need to insert another report.
3. Right-click and select **Insert**
4. Select the report(s) you need to include here in this Report Book, using Shift+Click or Ctrl+Click and click **OK** to validate
5. Close and save the Report Book.

4.2.3. Edit a Report from a Report Book

1. Double-click the Report Book to open it.
2. Select the report you want to Edit.
3. Right-click and select **Edit**
4. Modify the opened Report, then save it and close it.

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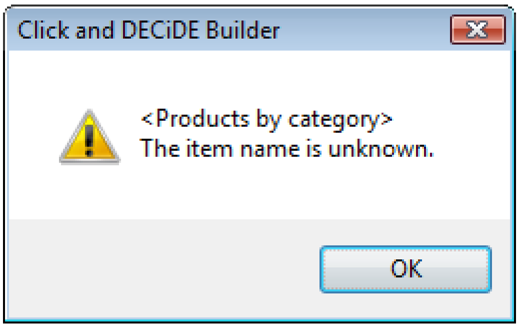
5. Close and save the Report Book.

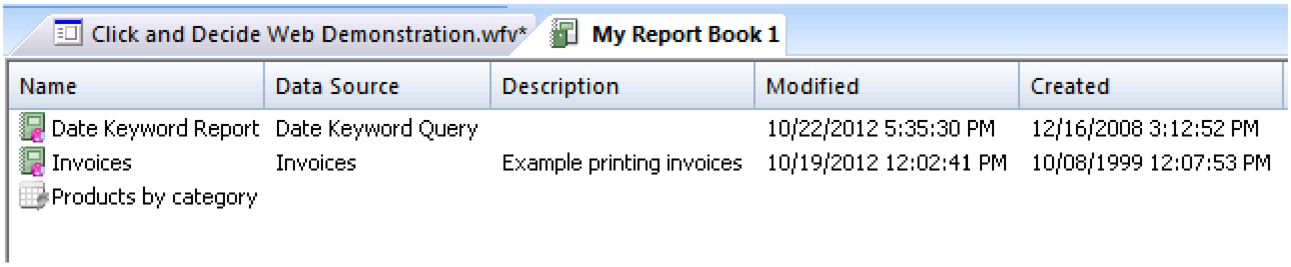
4.2.4. Missing reports in a Report Book

Sometimes you could get an error when opening a Report Book if one or several reports are not found, because they have been deleted or renamed. Example: if we rename the report Product by category as Product by categories, we will get this error when opening the "My Report Book" as describe previously in this manual (paragraph 4.1).

1. Click OK on this message



2. Then, the Report Book is opened, with a grey icon for each missing report:



3. Select the concerned missing report and press the **Del** key. Then, if needed, add another report.
4. Close and save the Report Book.

4.3. Delete a Report Book

If you wish to remove a report book inside a Click&DECiDe Builder project file, do the following:

1. Open the project file (*.wfv).
2. Select the Report Book.
3. Press the Del key.
4. Use the Save or Save All command to save your changes. Note that each time you save the project file, this one is automatically compacted.

5. Report from Raw Data Cube

Click&DECiDE Builder 2015 (64-bit) cannot create and run a Report from Raw Data Cube, as the Microsoft Cubes are not anymore supported in this version. Nevertheless if you have done with a Builder V13 (or older) such a Report, you can run it through the Web Portal 64-bit from Version 2015.

To know how to create such a Report, please see the Report User Guide made for Click&DECiDE Builder Version 13, 32-bit:
http://www.clickndecide.com/sites/default/files/assets/files/resources/clickndecide_bai_report_user_guide_0.pdf

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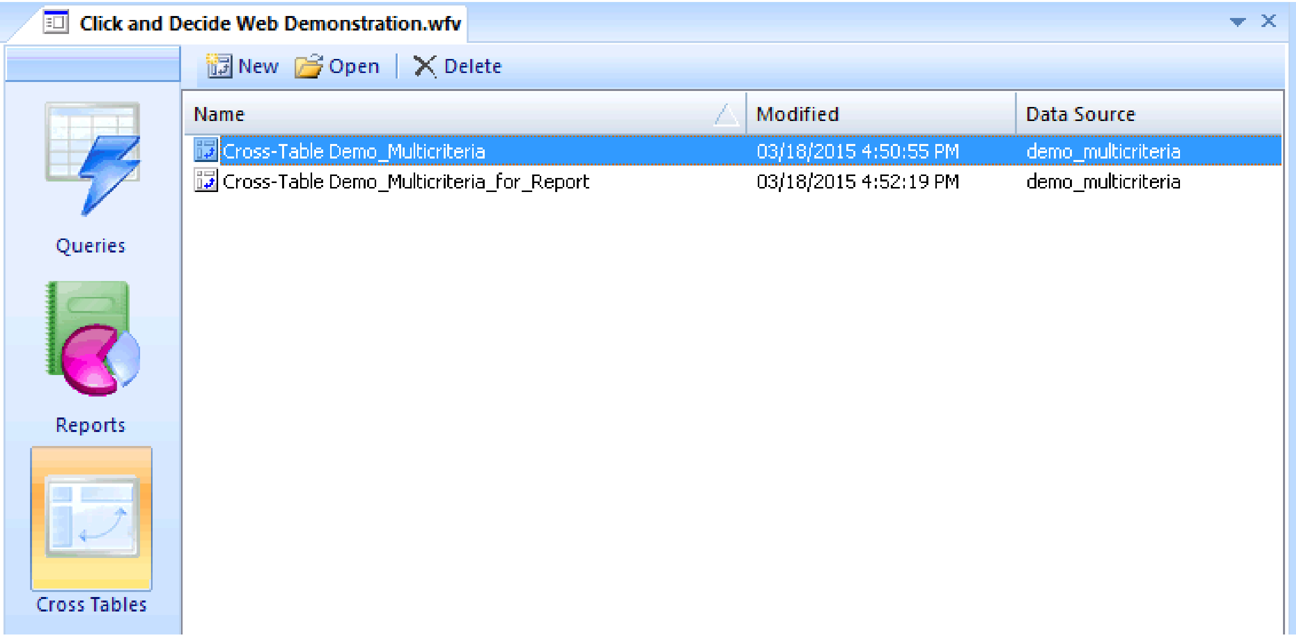
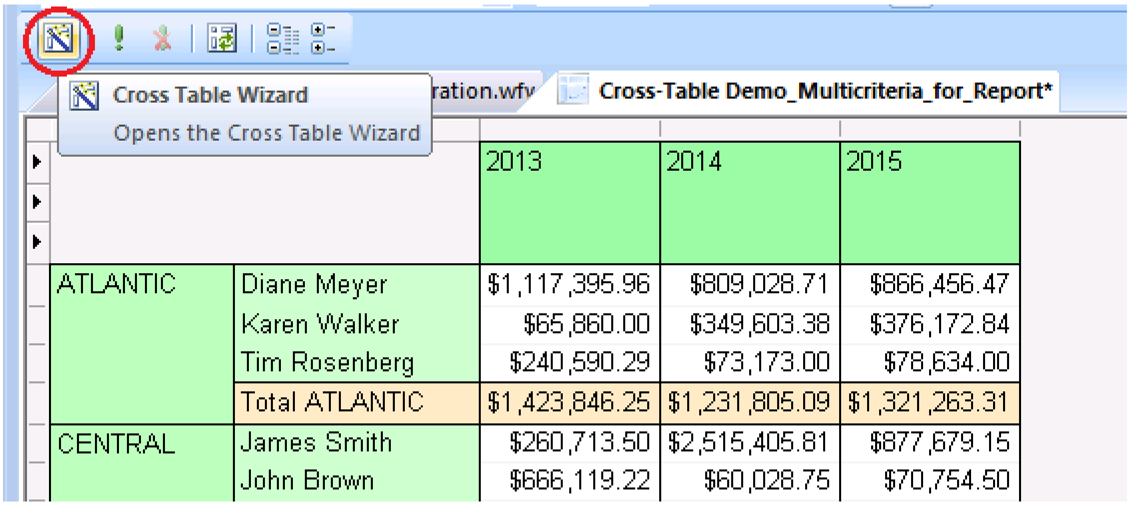
6. Report from Raw Cross Table Data

Click&DECiDE Builder 2015 (64-bit) can create and run a Report based on the data coming from a Cross-table made with Builder.

To give an example, open the Click and DECiDE Web Demonstration.wfv project file and select the Cross-Table Tab. Then make a copy of the proposed example “Cross-Table Demo_Multicriteria” cross-table under another name such as “Cross-Table Demo_Multicriteria_for_Report”



Then open this cross-table, run it and click the **Cross Table Wizard** icon to be able to modify the configuration:



In the wizard, remove the Quarter and Month dimensions to avoid to get too many columns in the Cross-table, then for the Report:

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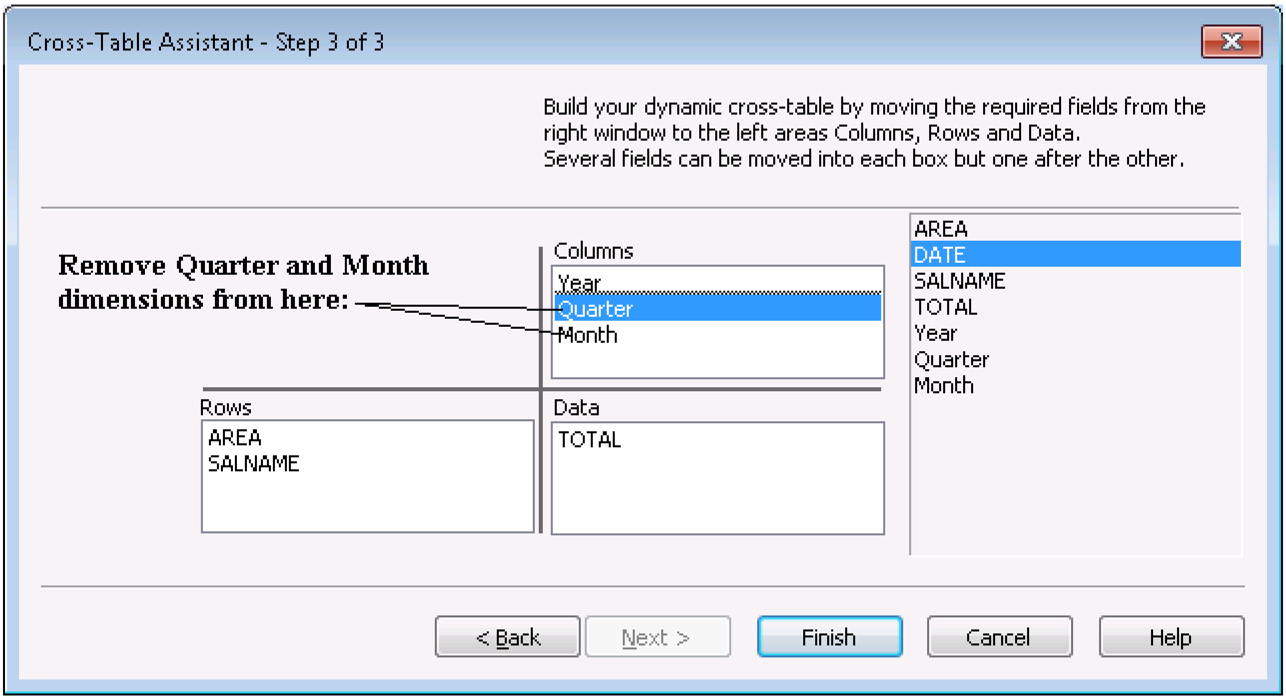
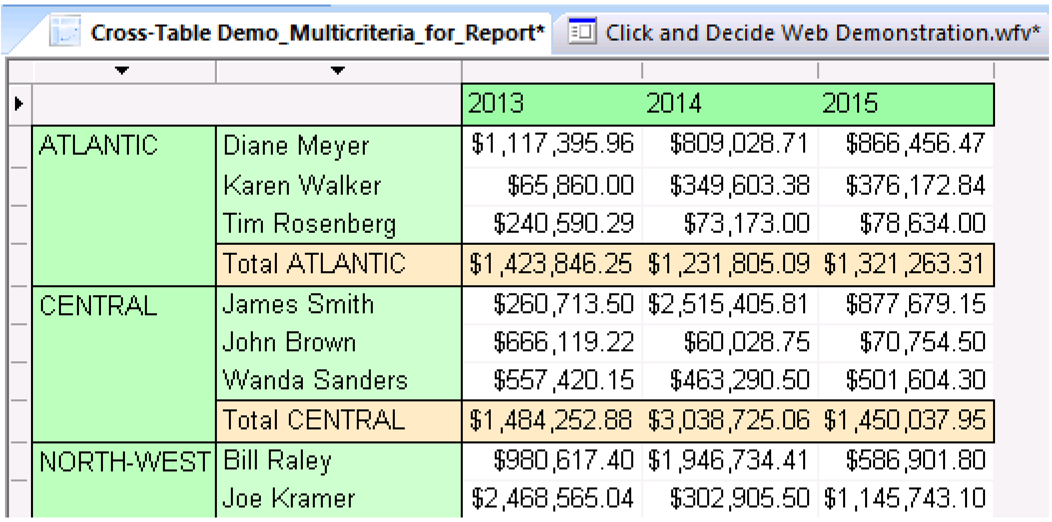


and click Finish

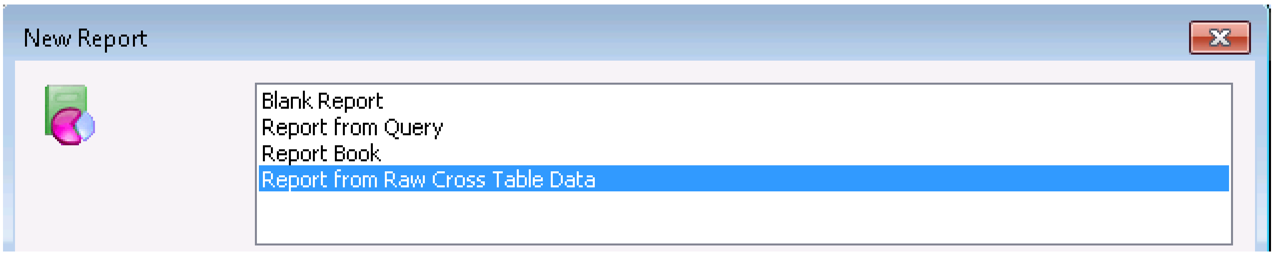


		2013	2014	2015
ATLANTIC	Diane Meyer	$1,117,395.96	$809,028.71	$866,456.47
	Karen Walker	$65,860.00	$349,603.38	$376,172.84
	Tim Rosenberg	$240,590.29	$73,173.00	$78,634.00
	Total ATLANTIC	$1,423,846.25	$1,231,805.09	$1,321,263.31
CENTRAL	James Smith	$260,713.50	$2,515,405.81	$877,679.15
	John Brown	$666,119.22	$60,028.75	$70,754.50
	Wanda Sanders	$557,420.15	$463,290.50	$501,604.30
	Total CENTRAL	$1,484,252.88	$3,038,725.06	$1,450,037.95
NORTH-WEST	Bill Raley	$980,617.40	$1,946,734.41	$586,901.80
	Joe Kramer	$2,468,565.04	$302,905.50	$1,145,743.10

The above Cross-table can be now used as a Data Source by a Report. This is useful when a query to get such a presentation can be longer to realize, with automatically data in column by year for example.

Save this Cross-Table. Now we are going to create a Report using the Raw Cross Table Data:

1. In the Click&DECiDE project file, select the Report Tab and click the “New” icon to create a New Report.



2. Then select in the box below the required Cross Table to be used as a Data Source:

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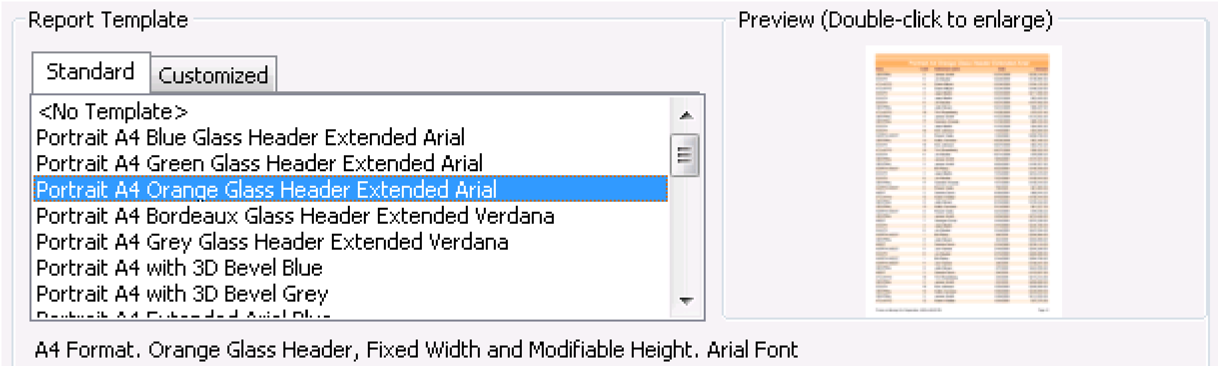
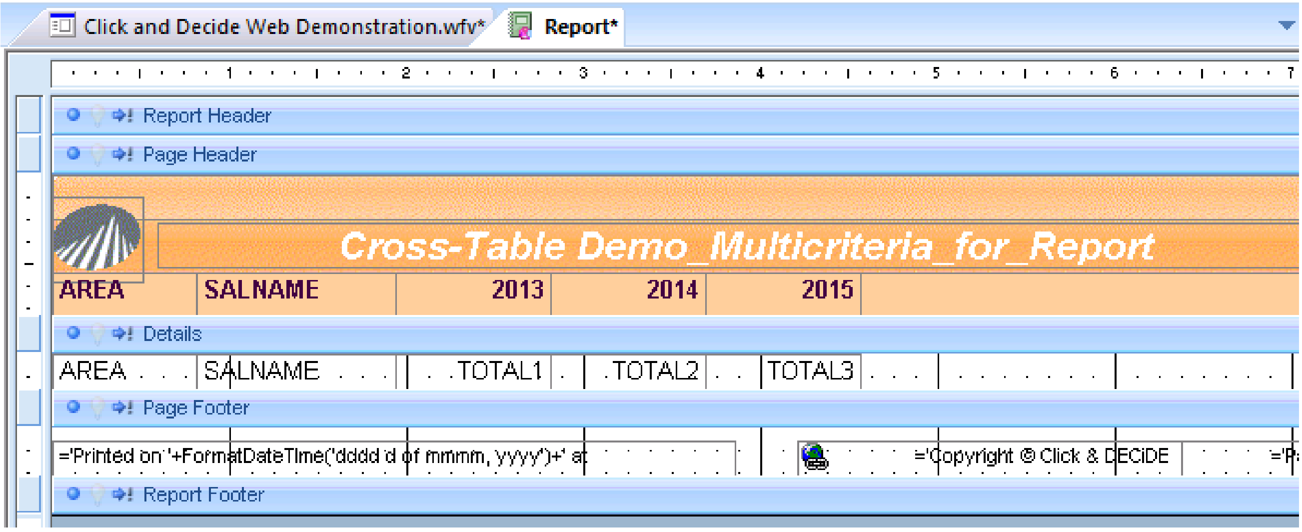
3. Then select a Report Template depending on the future report size (Portait or Landscape)

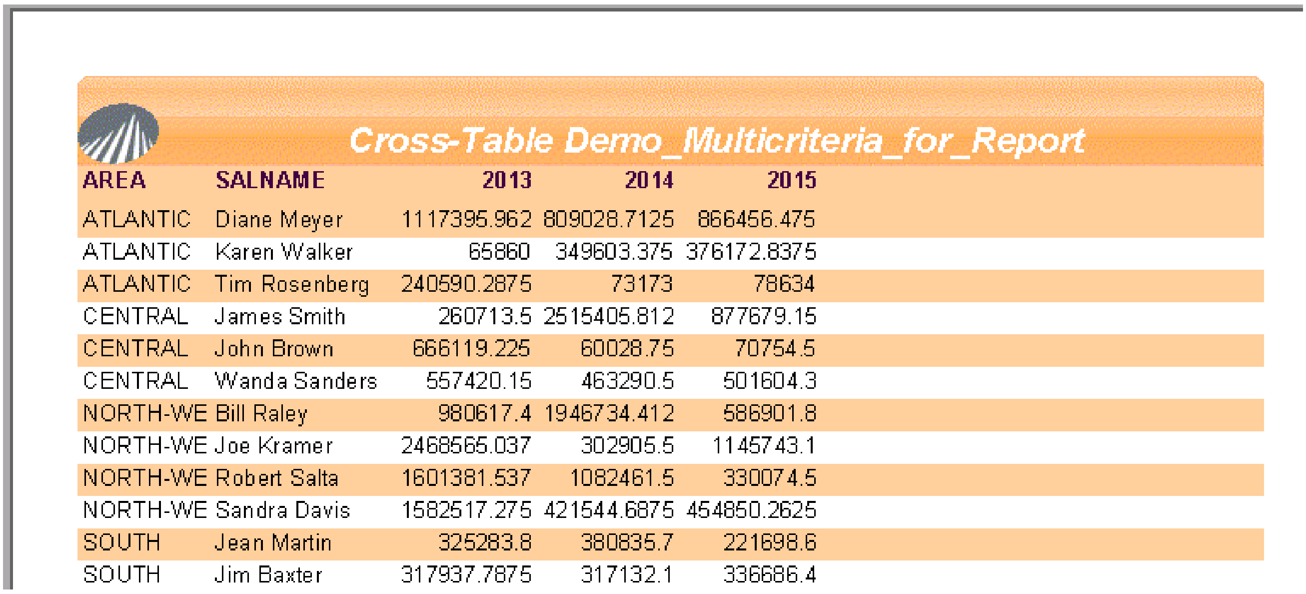


4. Click OK: a new report is created as follow:



Each column Dimension has generated a column in the Report. The Heading Label are using the column name or the Dimension value. The detailed block in the report will be fed by the Cross Table data rows.

5. Run the Repot to check the Result:


Cross-Table Demo_Multicriteria_for_Report

AREA	SALNAME	2013	2014	2015
ATLANTIC	Diane Meyer	1117395.962	809028.7125	866456.475
ATLANTIC	Karen Walker	65860	349603.375	376172.8375
ATLANTIC	Tim Rosenberg	240590.2875	73173	78634
CENTRAL	James Smith	260713.5	2515405.812	877679.15
CENTRAL	John Brown	666119.225	60028.75	70754.5
CENTRAL	Wanda Sanders	557420.15	463290.5	501604.3
NORTH-WE	Bill Raley	980617.4	1946734.412	586901.8
NORTH-WE	Joe Kramer	2468565.037	302905.5	1145743.1
NORTH-WE	Robert Salta	1601381.537	1082461.5	330074.5
NORTH-WE	Sandra Davis	1582517.275	421544.6875	454850.2625
SOUTH	Jean Martin	325283.8	380835.7	221698.6
SOUTH	Jim Baxter	317937.7875	317132.1	336686.4

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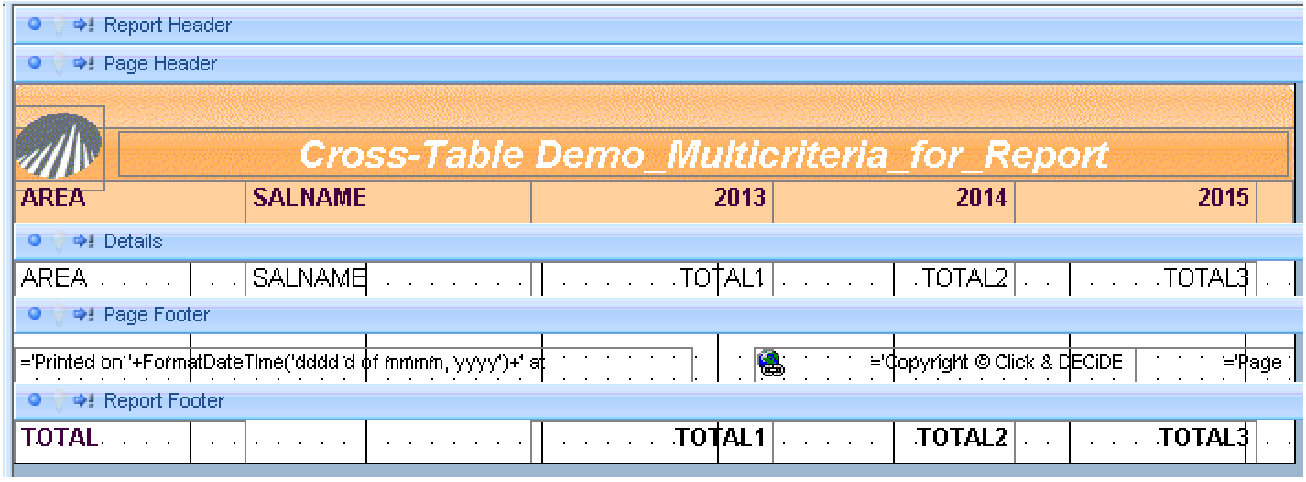
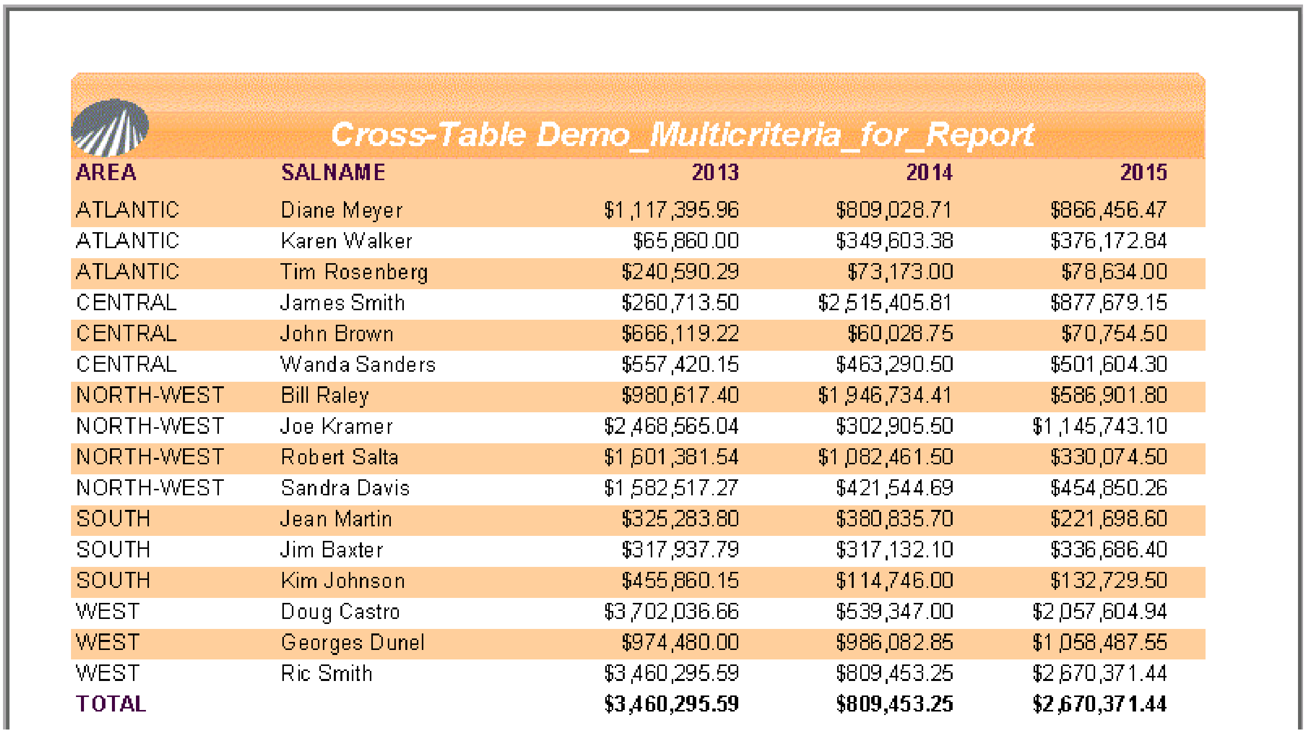
6. Make the required adjustments if needed, such as column width, field formats etc.

In the following example, the column width has been increase, the fields moved to the right, the numeric field are now in currency format and the TOTAL has been added in the Report Footer:



7. Final Result:



Cross-Table Demo_Multicriteria_for_Report

AREA	SALNAME	2013	2014	2015
ATLANTIC	Diane Meyer	$1,117,395.96	$809,028.71	$866,456.47
ATLANTIC	Karen Walker	$65,860.00	$349,603.38	$376,172.84
ATLANTIC	Tim Rosenberg	$240,590.29	$73,173.00	$78,634.00
CENTRAL	James Smith	$260,713.50	$2,515,405.81	$877,679.15
CENTRAL	John Brown	$666,119.22	$60,028.75	$70,754.50
CENTRAL	Wanda Sanders	$557,420.15	$463,290.50	$501,604.30
NORTH-WEST	Bill Raley	$980,617.40	$1,946,734.41	$586,901.80
NORTH-WEST	Joe Kramer	$2,468,565.04	$302,905.50	$1,145,743.10
NORTH-WEST	Robert Salta	$1,601,381.54	$1,082,461.50	$330,074.50
NORTH-WEST	Sandra Davis	$1,582,517.27	$421,544.69	$454,850.26
SOUTH	Jean Martin	$325,283.80	$380,835.70	$221,698.60
SOUTH	Jim Baxter	$317,937.79	$317,132.10	$336,686.40
SOUTH	Kim Johnson	$455,860.15	$114,746.00	$132,729.50
WEST	Doug Castro	$3,702,036.66	$539,347.00	$2,057,604.94
WEST	Georges Dunel	$974,480.00	$986,082.85	$1,058,487.55
WEST	Ric Smith	$3,460,295.59	$809,453.25	$2,670,371.44
TOTAL		**$3,460,295.59**	**$809,453.25**	**$2,670,371.44**

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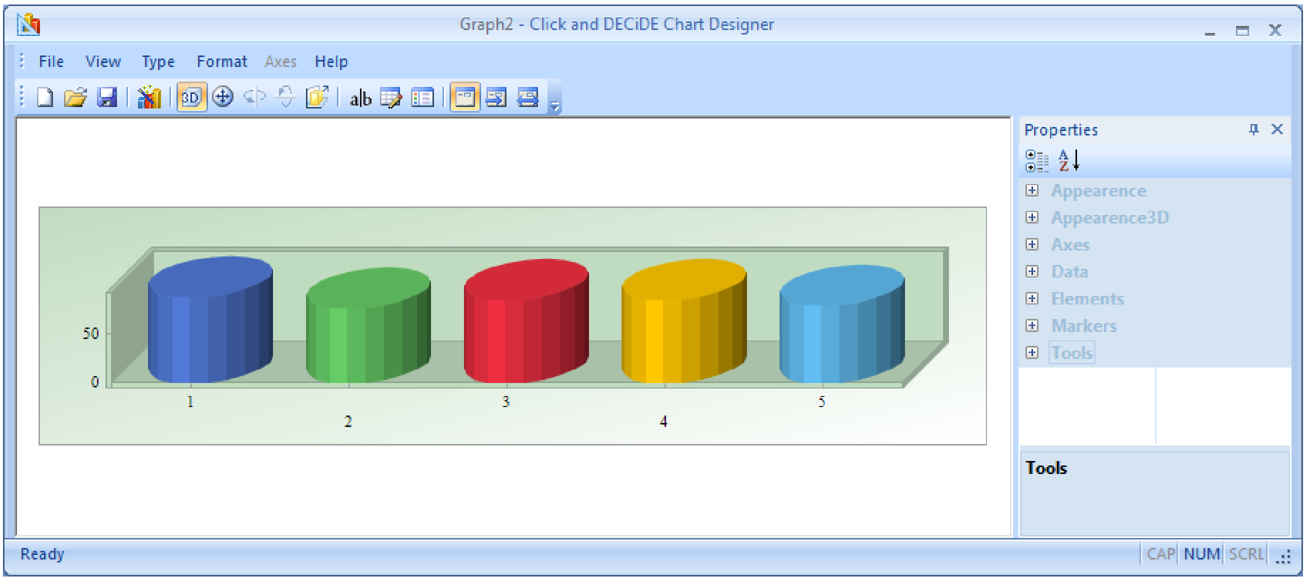
7. Click&DECiDE Chart Designer

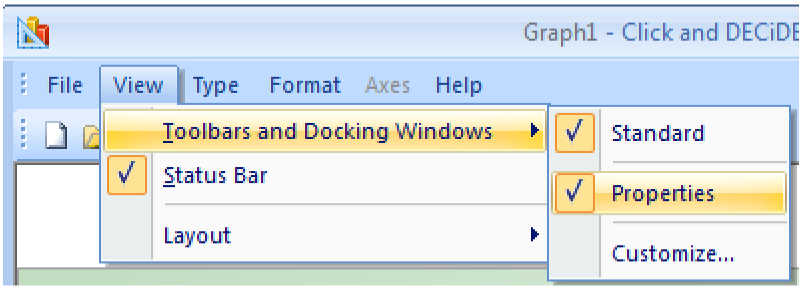
Once you have inserted a new graph in a report or want to modify an existing graph, you can use the Click&DECiDE Chart Designer by making a right click on the Chart object then click **Edit**:



Note: the size of the Chart object in the Click and DECiDE Chart Designer is automatically depending on the Chart Object size in your report. Enlarge the chart in the report to get a biggest chart object in the Chart Designer.

7.1. Displaying the Properties

If the right Properties pane is closed, you can open it again using the command **View> Toolbars and Docking Windows> Properties**



7.2. Opening a Chart Template

Use the command **File> Open** and search for the required template file having the cfx extension in the default directory C:\Program Files\Click and DECiDE\BAI\ChartModels. This command will not display a preview of each template. You also can use the  icon in the Toolbar to display a preview of all existing templates and select the one you need. We recommend this method, much easier to see the more appropriate template.

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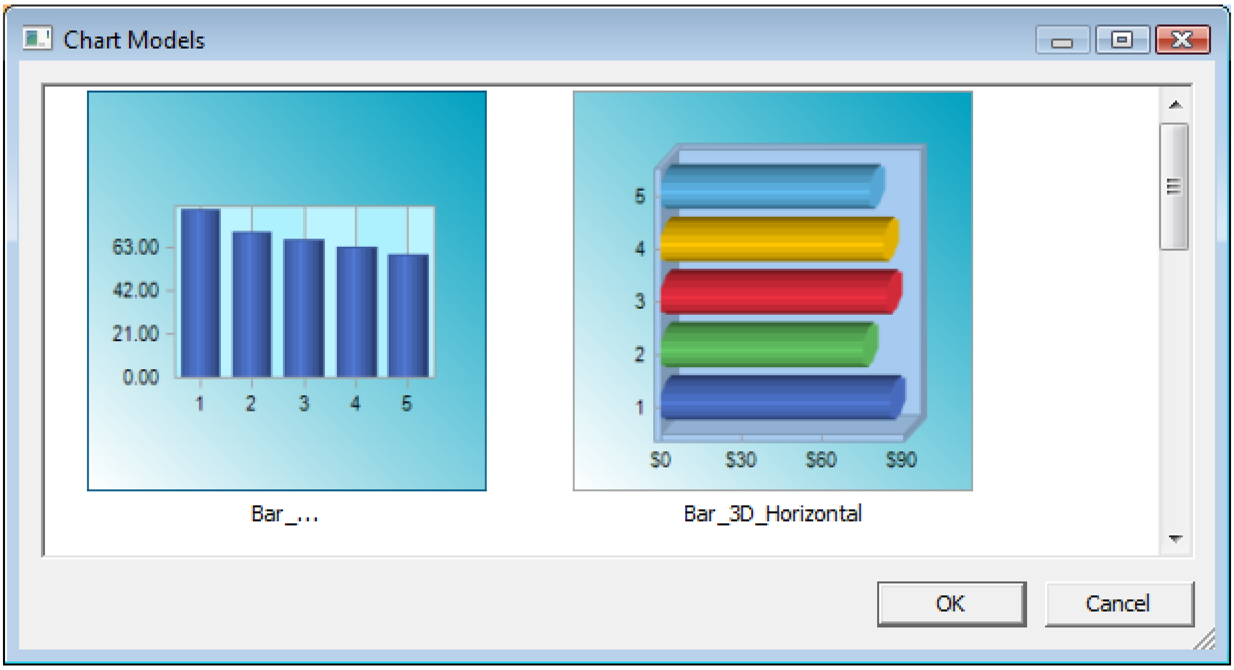


7.3. Saving a Chart as a Template

Use the command **File> Save As** and enter a name for the new template file with the cfx extension in the default directory C:\Program Files\Click and DECiDE\BAI\ChartModels

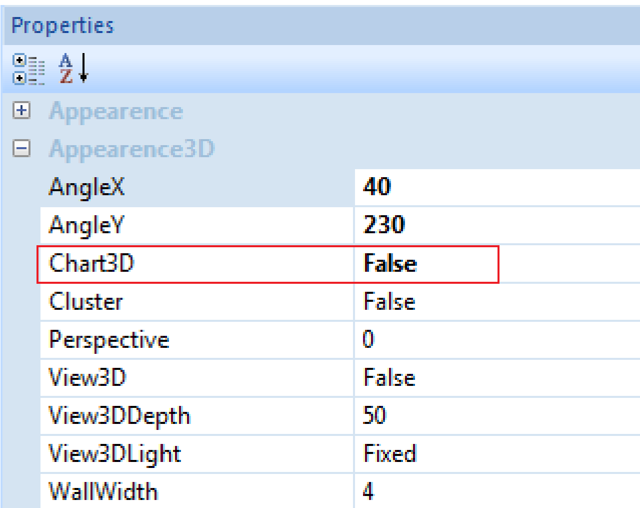
Use the command **File> Save** if you only want to actualize an existing template.

7.4. Most Used Commands

Instead of using the advanced commands in the right Properties pane, you can use the following commands or icons for most of the current features:

7.4.1. Change the Chart 3D Effect

Use the 3D icon to enable or disable the Chart3D effect. In the Properties box, this icon will change the following **Chart3D** item:



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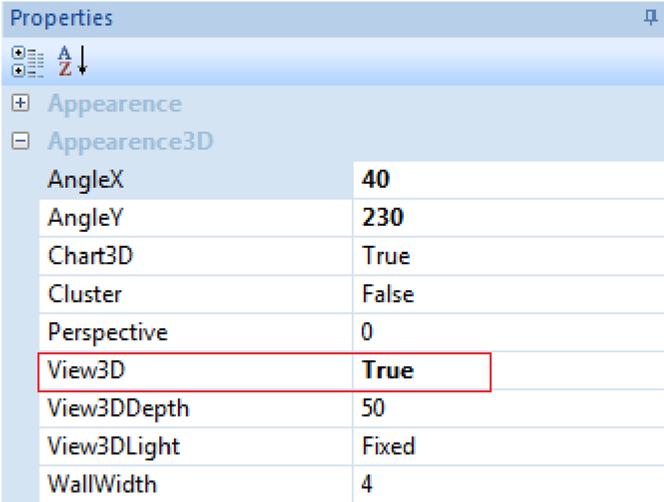
7.4.2. Change the View 3D Effect

If the Chart3D effect is enabled, use the icon to modify the view 3D mode. In the Properties box, this icon will change the following **View3D** item:



7.4.3. Change the Appearance3D AngleY

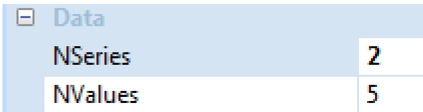
If the Chart3D and View3D effects are enabled, use the icon to modify the **AngleY** value in the above picture.

7.4.4. Change the Appearance3D AngleX

If the Chart3D and View3D effects are enabled, use the icon to modify the **AngleX** value in the above picture.

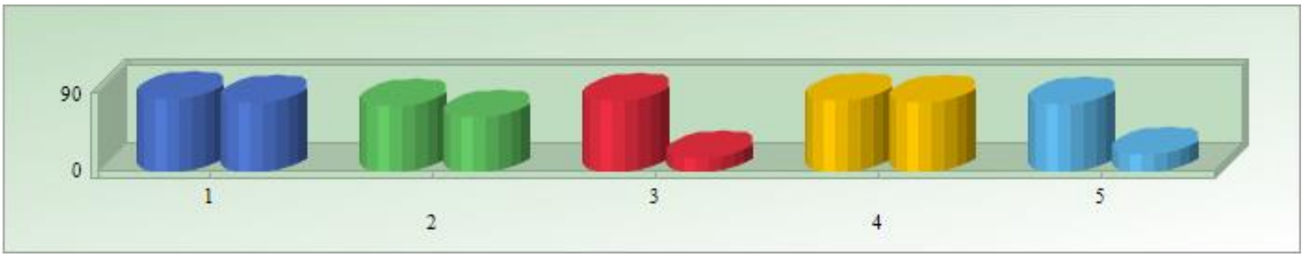
7.4.5. Change the Cluster Effect

If more than one series is defined in the **Data** Properties

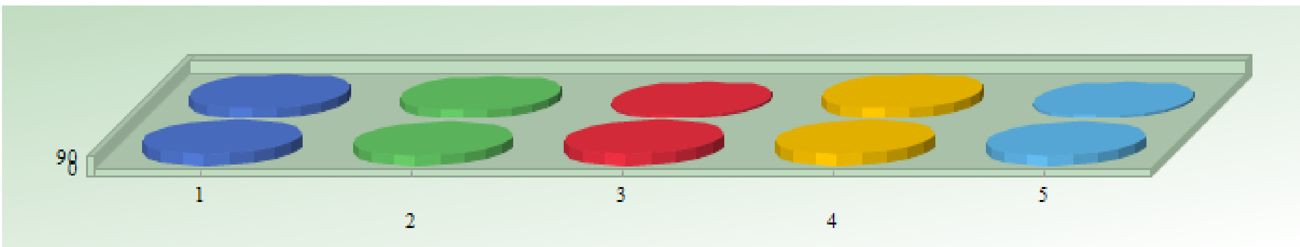


, then you can use the icon to change the cluster effect:

Example with Cluster set to **False** in the Appearance3D properties:



Example with Cluster set to **True** in the Appearance3D properties:



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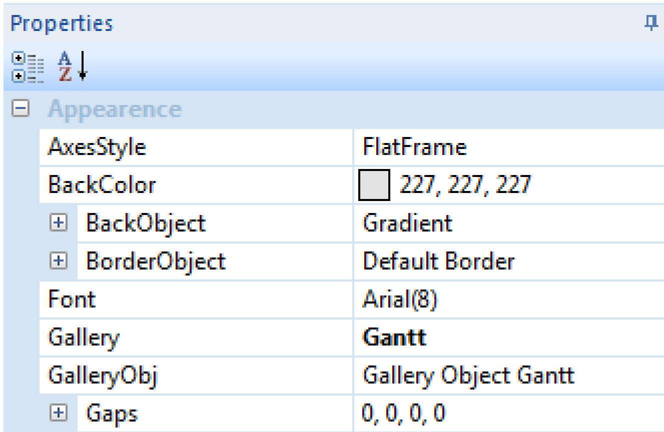
7.4.6. Change the Chart Type

Use the command **Type** to select another chart type.

Type Command

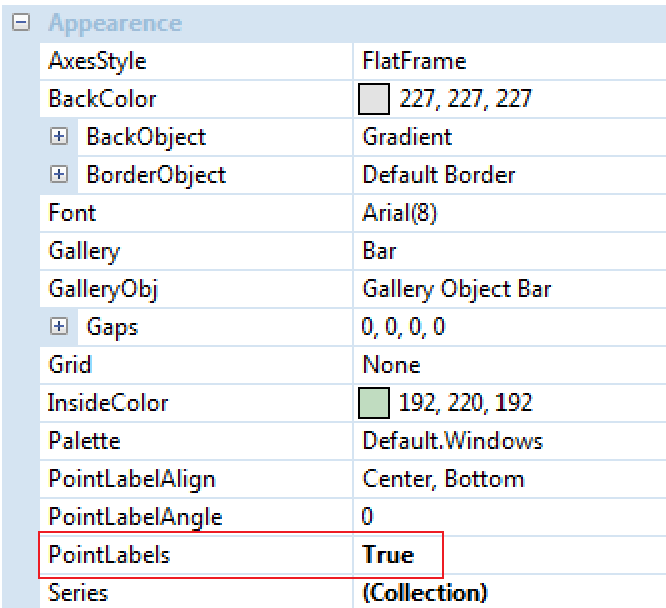
Any choice of a Chart Type will affect the Gallery and GalleryObj in the right Appearance Properties Pane

Properties Pane



7.4.7. Adding Point Labels

Use the  icon to display the point labels in the Chart.This action will modify the **PointLabels** option in the right Properties pane for the Appearance:



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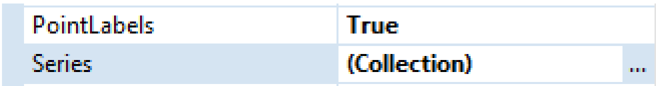
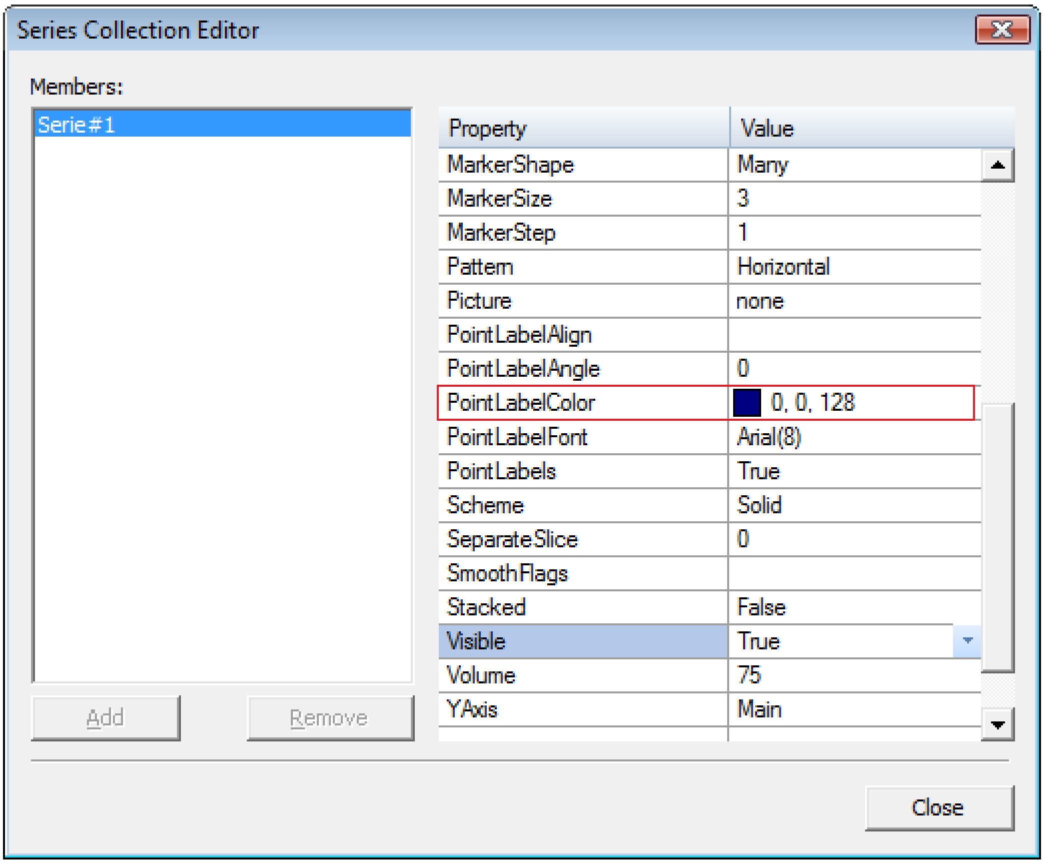
7.4.8. Modifying the Point Label Color

Once the Point Labels have been added, click the button in the **Series (Collection)** box

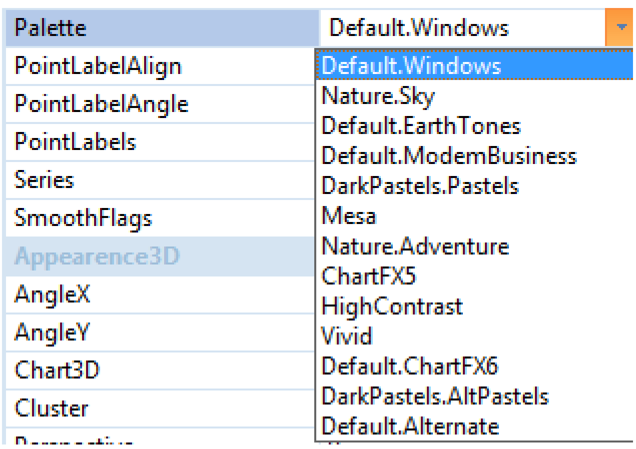


Then select the **Point Label Color** in the following **Series Collection Editor**:



7.4.9. Modifying the Palette Color

If you wish to select another palette color, click the icon in the Palette box and select the required palette:



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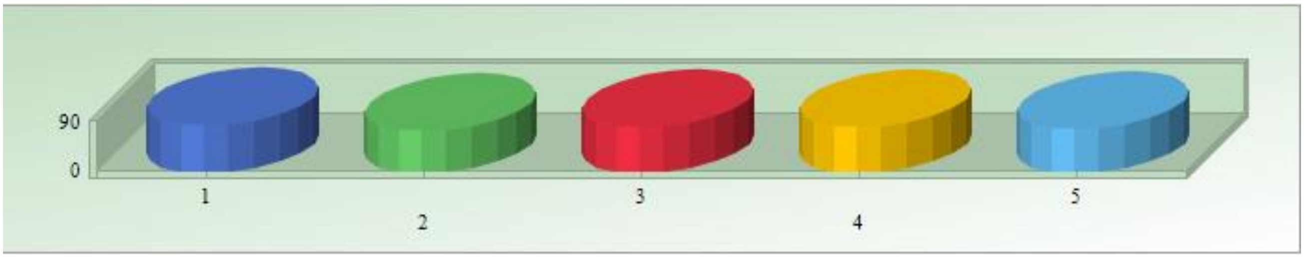
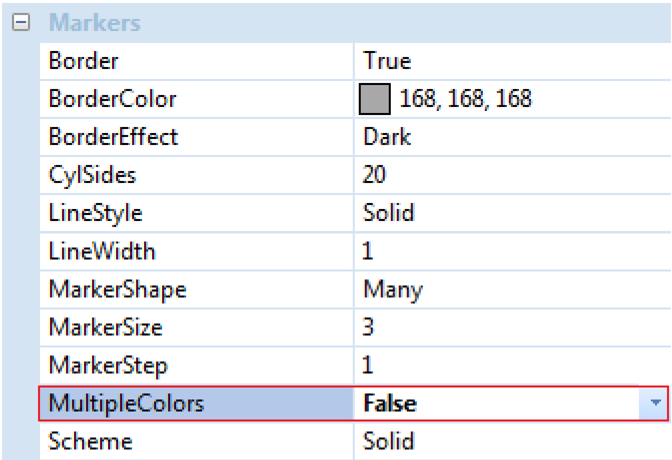
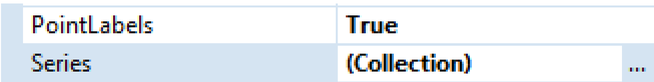
7.4.10. Modifying the Multiple Color Effect

If you have a Bar Chart for example as follow:

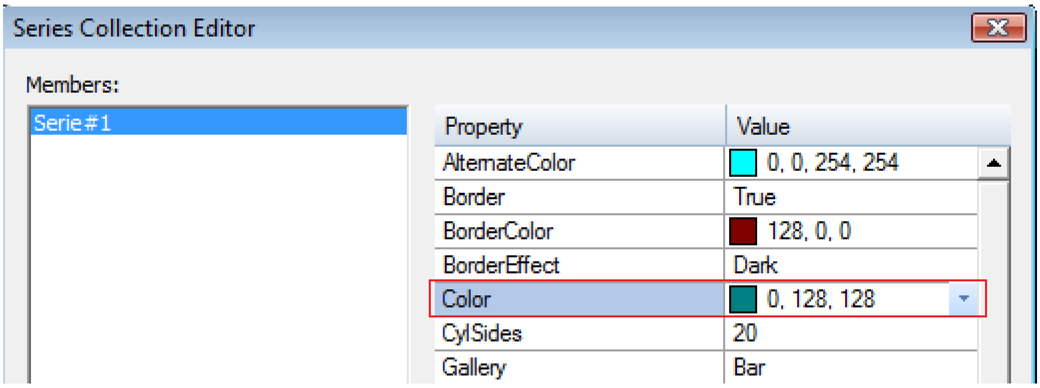


And you would like to get only one color: click on the Markers level in the right Properties pane and select False for the **MultipleColors** option:

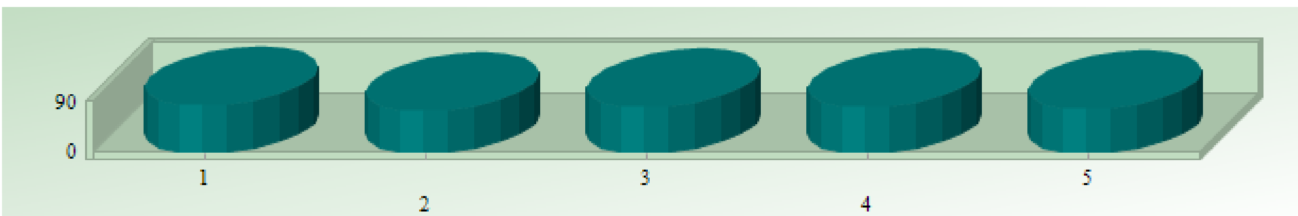


Then use the 

to modify if needed the **color** to be used in the **Series Collection Editor**:



The result could be with the above color (RGB=0,128,128):



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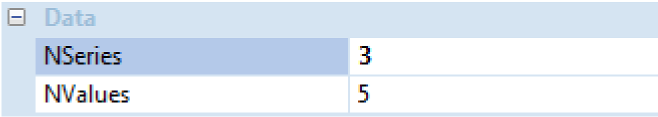
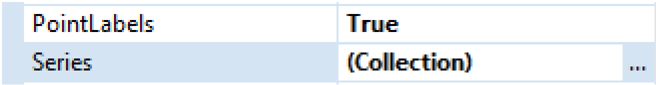
7.4.11. Change the number of Series or Values

If you wish to change the number of Series or the number of Values, click the corresponding boxes in the Data level in the right Properties pane and change the number(s):

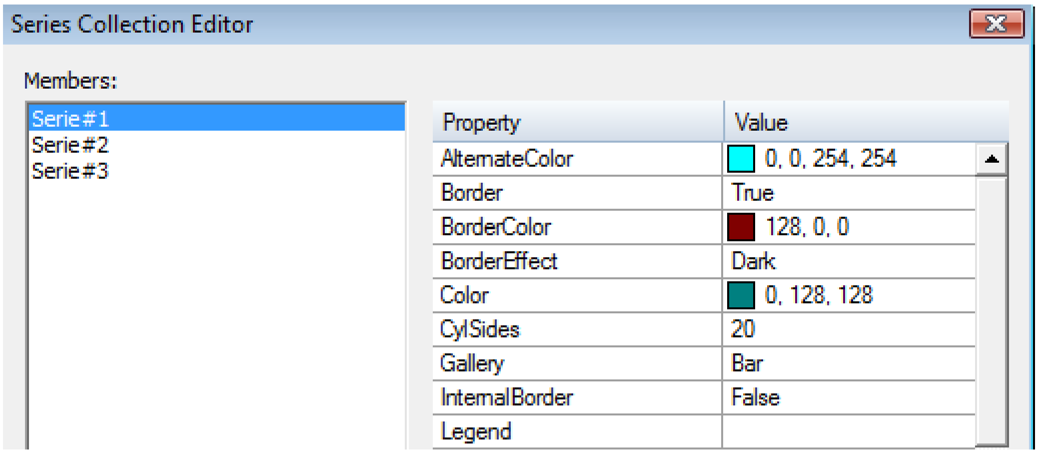


7.4.12. Change the color for each Series

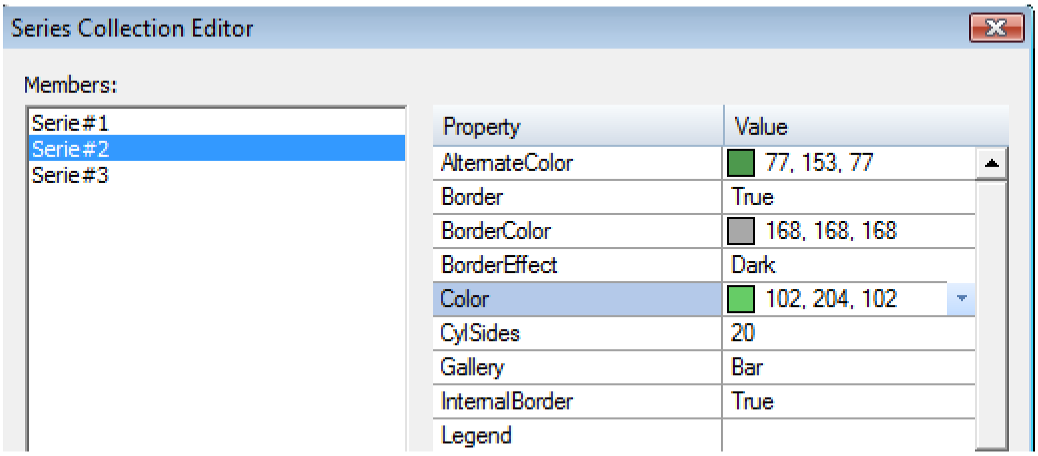
Go back to the **Series Collection Editor** to change the color for each series:



Click the ... icon. Here you can change the color for the Serie#1 but also the cylinder size, the Gallery style (Bar, Line etc.), the Legend etc.



Select the Series#2 if you also wish to change some attributes (color, Cylindre size, Gallery type, Legend etc.):



Repeat the same steps for the Serie#3.

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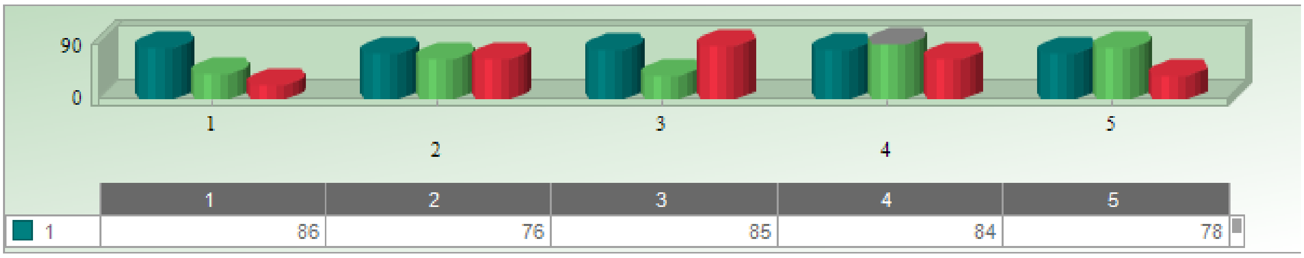
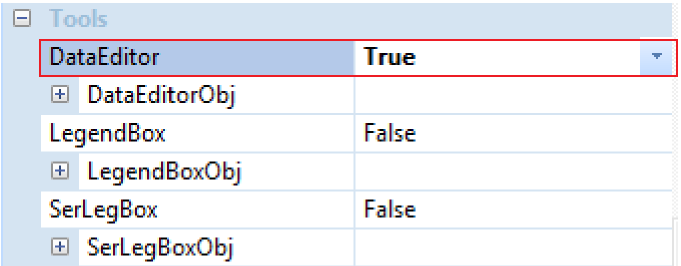
7.4.13. Display the Data Editor

Click the icon if you wish to display the **Data Editor**. You will get the data editor by default below the Chart:



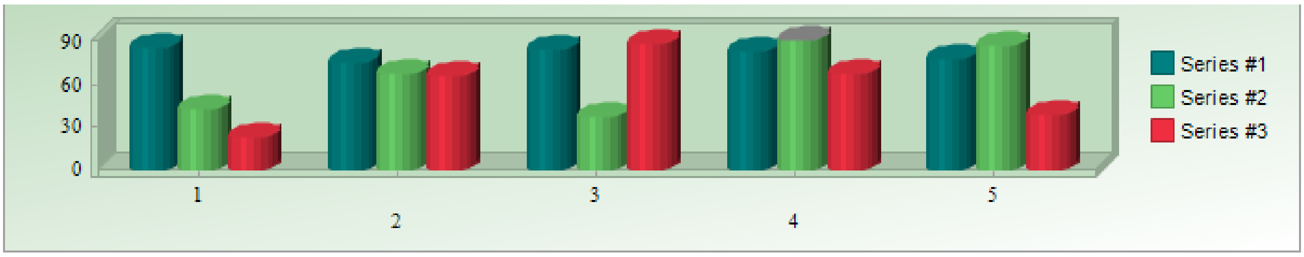
This command will change the right Properties pane in the **Tools/Data Editor** level branch:



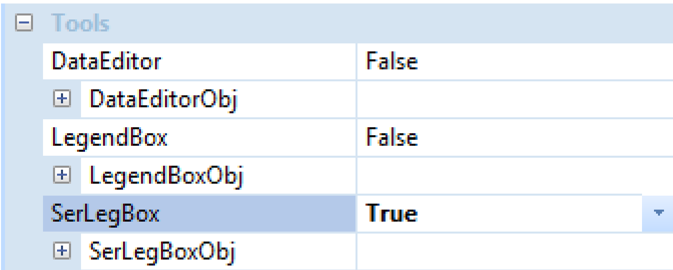
Click the **DataEditorObj** branch to modify the Data Editor attributes (position, color, alignment etc.)

7.4.14. Display the Series Legend Box

Click the command **Format> Legend> Series** or the icon if you wish to display the **Series Legend Box**. You will get the Series Legend box by default on the right side of the Chart:



This command will change the right Properties pane in the **Tools/SerLegBox** level branch:



Click the **SerLegBoxObj** branch to modify the Series Legend Box attributes (position, color, alignment etc.)

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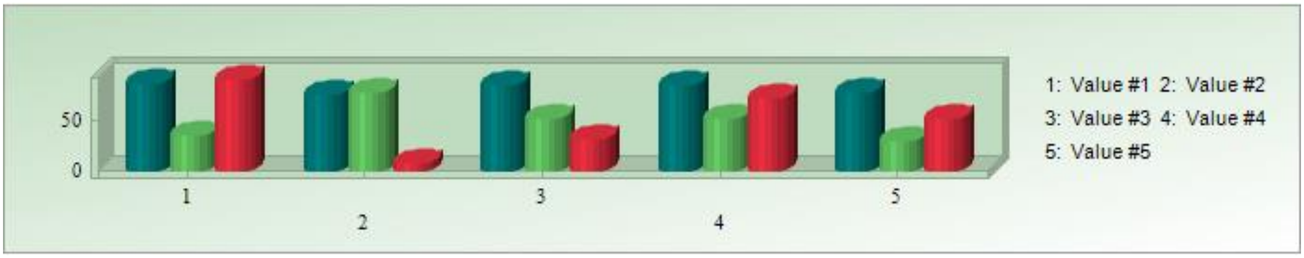
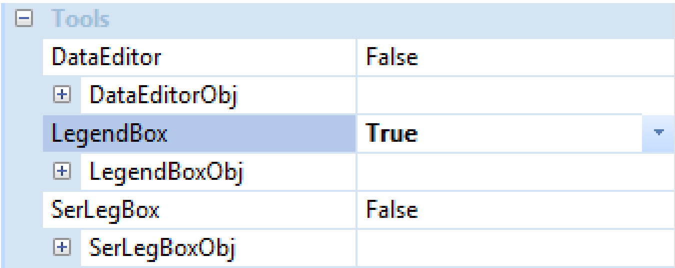
7.4.15. Display the Legend Box

Click the command **Format> Legend> Values** to display the Legend box by default on the right of the Chart.



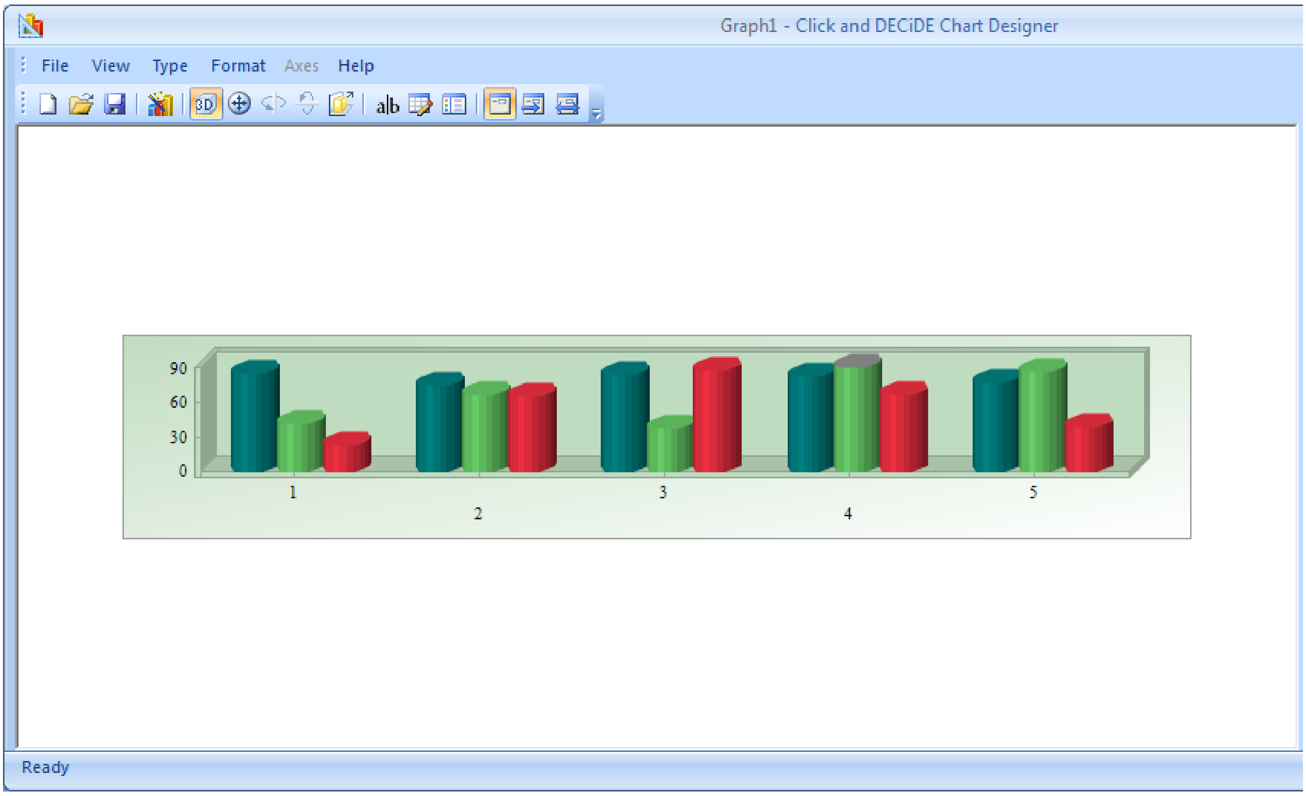
This command will change the right Properties pane in the **Tools/LegendBox** level branch:



Click the **LegendBoxObj** branch to modify the Legend Box attributes (position, color, alignment etc.)

7.4.16. Change the Chart View Layout

Click the command **View> Layout> Default** or click the icon to display the **Default** layout:



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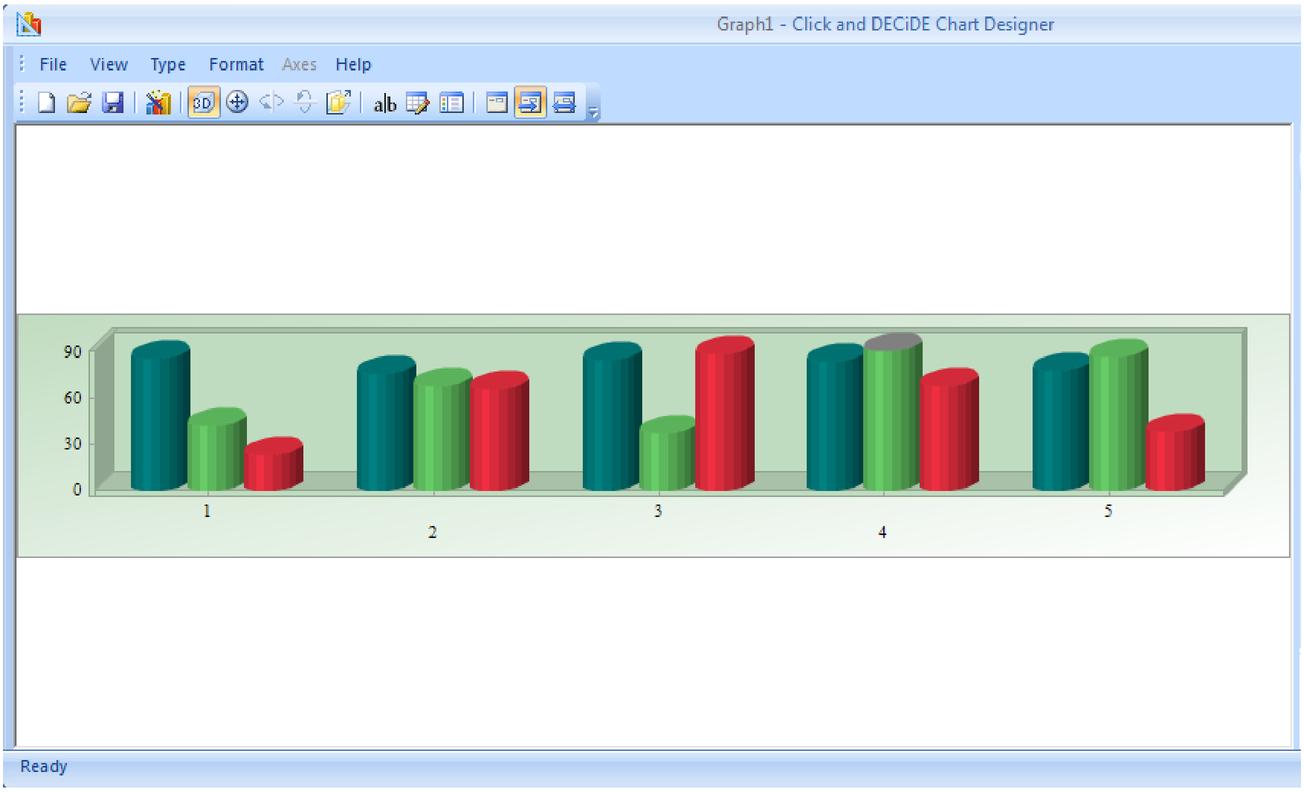
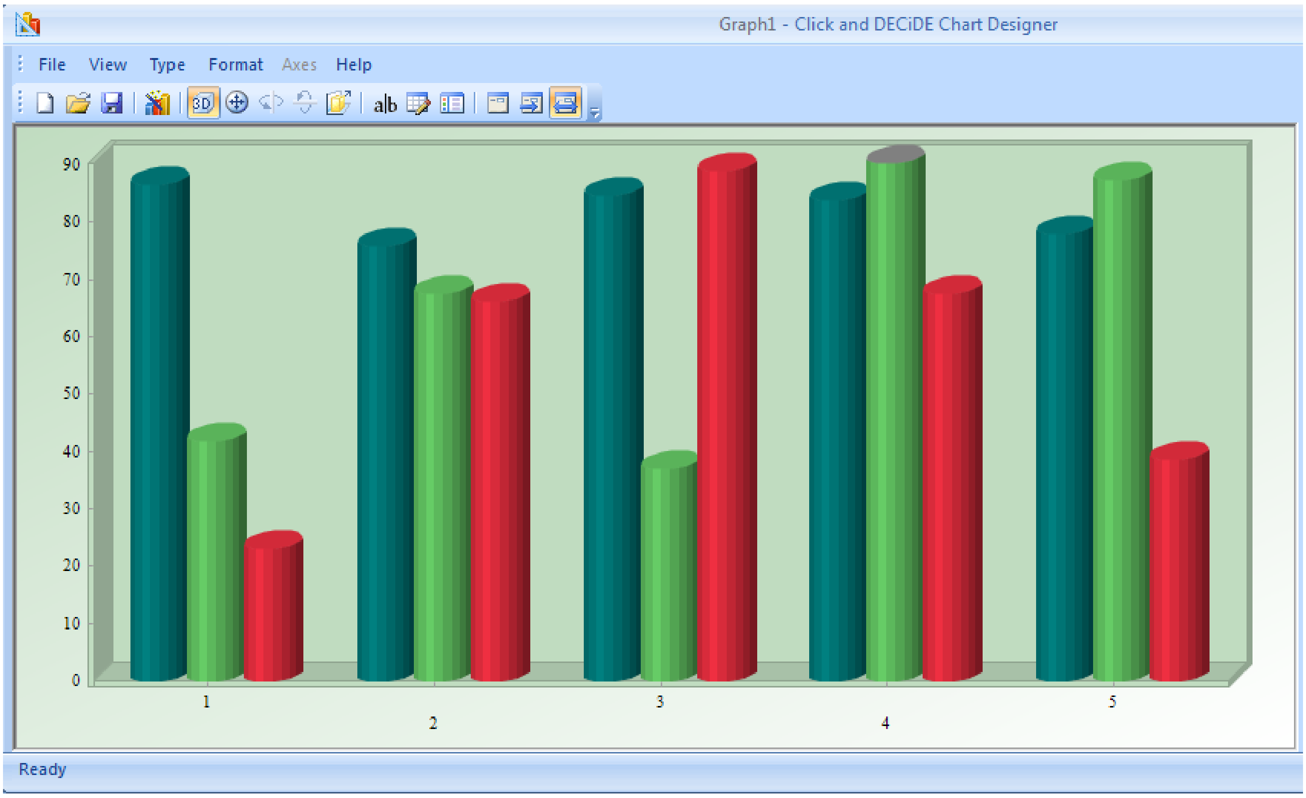
Click the command **View> Layout> Homothetic** or click the icon to display the **Homothetic** layout:



Click the command **View> Layout> Stretch Image** or click the icon to display the **Stretch Image** layout:



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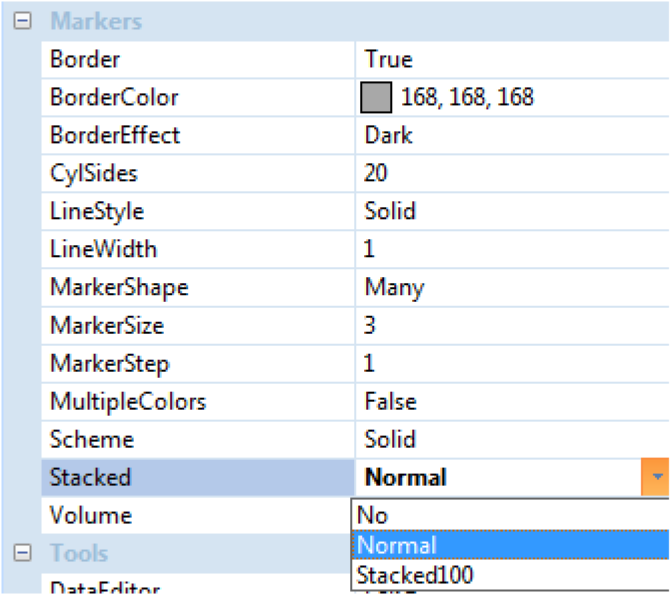
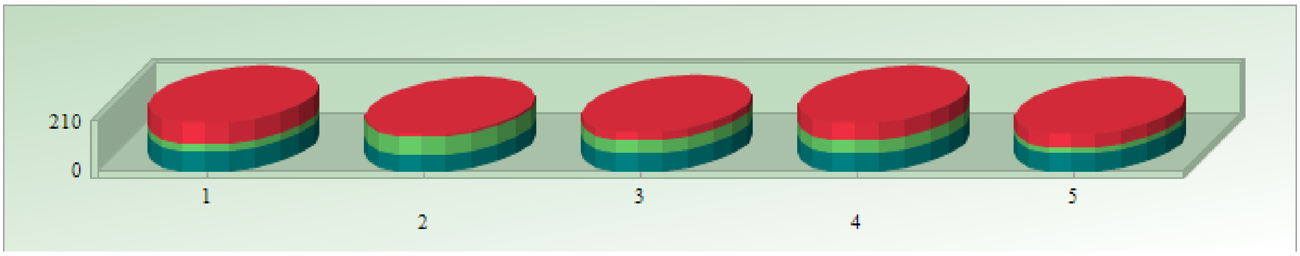
7.4.17. Define Stacked Series

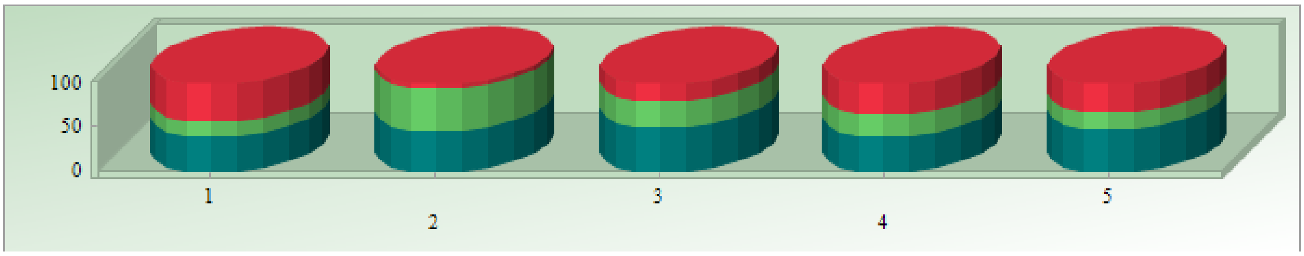
If more than one series id defined, you can wish to display stacked values. To do so, open the Markers level branch in the right Properties pane, and select the option among No, Normal or Stacked 100:



Example with the **Normal** option:



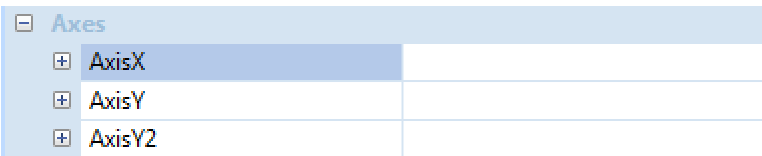
Example with the **Stacked100** option:



All cylinders have the same height, each series being a percentage of the 100% total.

7.4.18. Modifying Axes Values Attributes

If you wish to modify the axes values attributes, such as Font, Color, Position, Decimal number, Autoscale etc. Click the corresponding axe:



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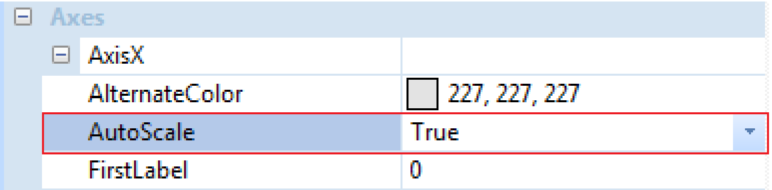
7.4.18.1. Autoscale

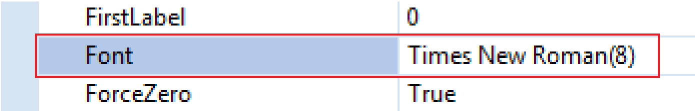
Select **True** for the **AutoScale** branch level



Axes	
AxisX	
AlternateColor	227, 227, 227
AutoScale	True
FirstLabel	0

7.4.18.2. Font and Size

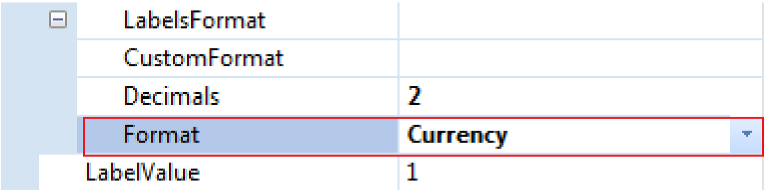
Define the Font and size in the **Font** branch level



FirstLabel	0
Font	Times New Roman(8)
ForceZero	True

7.4.18.3. Label Format

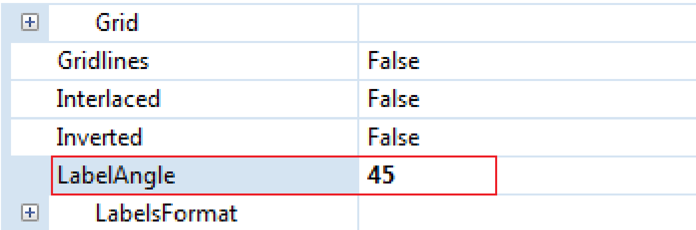
Specify the Label format and decimal number if needed in the **LabelsFormat** branch level:



LabelsFormat	
CustomFormat	
Decimals	2
Format	Currency
LabelValue	1

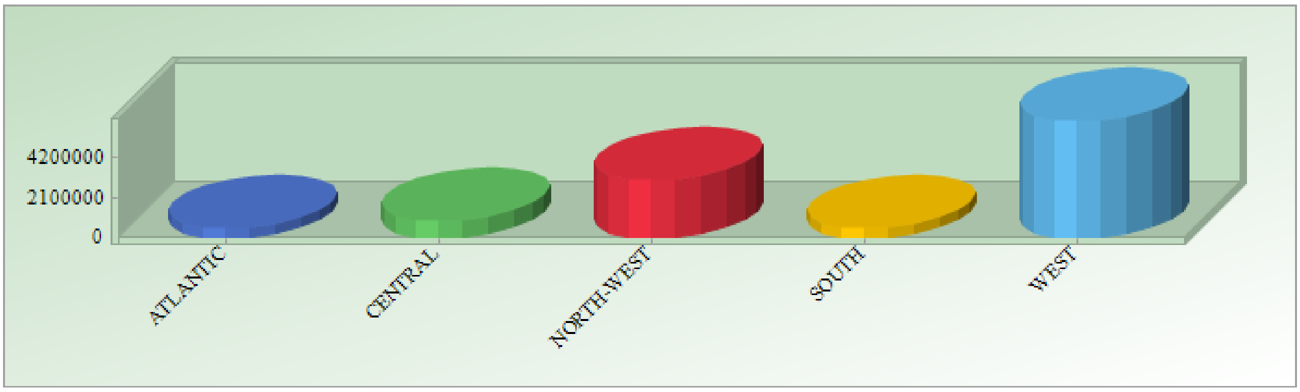
7.4.18.4. Label Angle

Specify the Label Angle if needed in the **LabelAngle** branch level:



Grid	
Gridlines	False
Interlaced	False
Inverted	False
LabelAngle	45
LabelsFormat	

Example with a 45° value:



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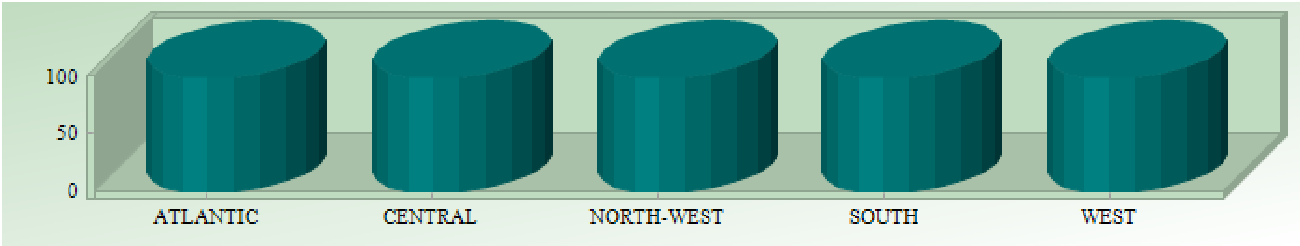
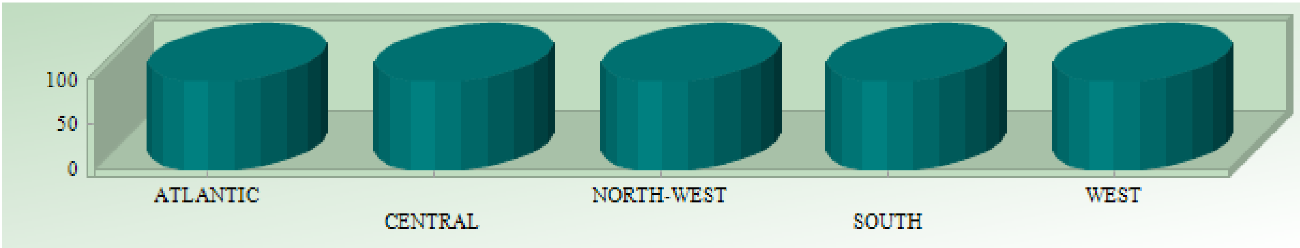
7.4.18.5. Staggered Values

When the Staggered option is false all values are aligned in one row. Sometimes you need to get a staggered presentation:

Staggered False: one row is used for all X values



Staggered True: two rows are used for all X values, useful when having long texts.



7.4.18.6. Axis Title

Select the **Title** branch level to define the Axe Title, color, font, position etc.

⊟ Title	
Alignment	Center
BackColor	0, 255, 255, 255
DrawingArea	True
Flags	
Font	**Arial(10)**
Gap	0
LineGap	2
Text	**Area**
TextColor	**0, 0, 254**

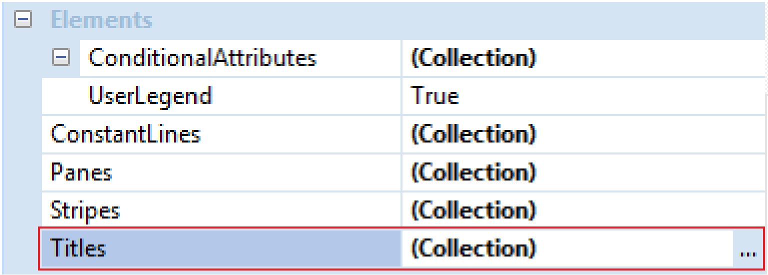
7.4.18.7. Display or Hide an Axe

Select the **Visible** branch level for the concerned Axe and chose among True or False:

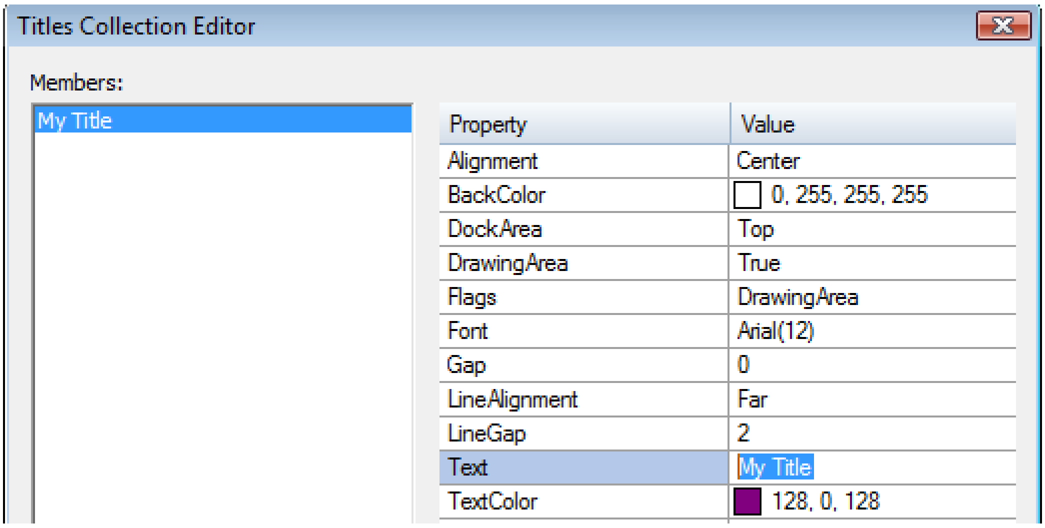
Visible	True

7.4.19. Add a Chart Title

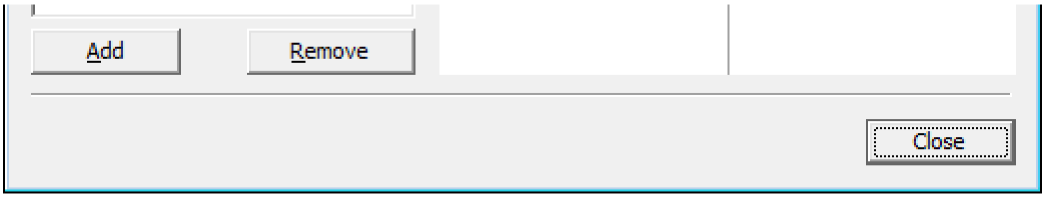
1. Select the **Titles** level in the **Elements** branch of the right Properties pane:



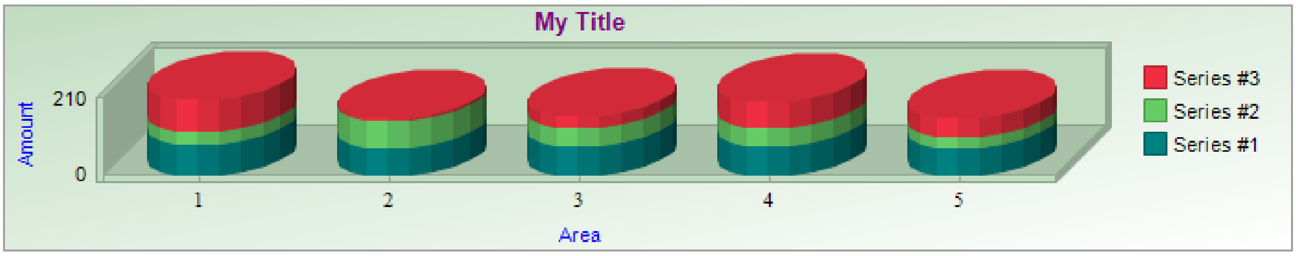
2. Select the ... button and click **Add**, then enter the **Text** Title and modify the attributes:



3. Click **Close**



4. Check the result



7.4.20. Changing the Axe Style

In the Appearance branch in the right Properties pane, select the **AxesStyle** level and choose among None, Frame3D, Math and FlatFrame.

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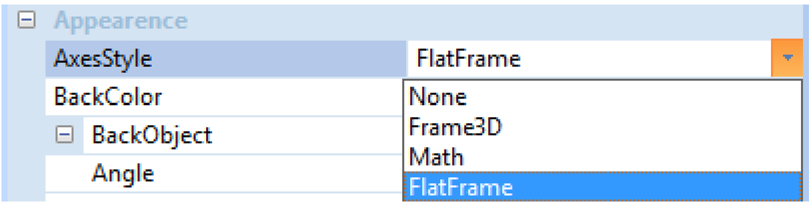
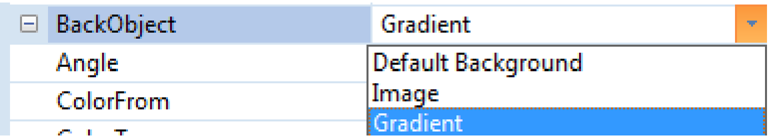
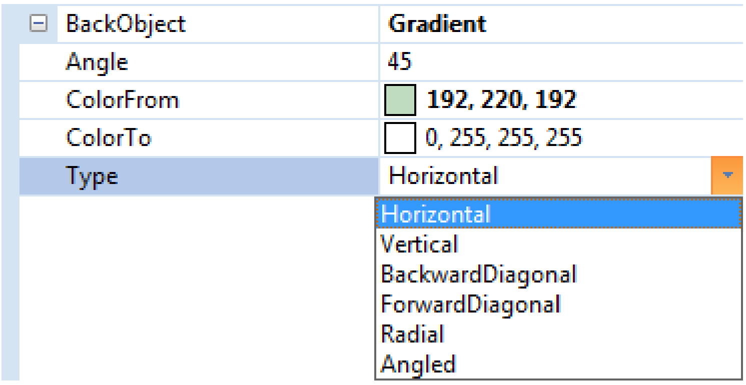


7.4.21. Changing the Background

In the Appearance branch in the right Properties pane, select the **BackColor** level and choose among Default Background, Image and Gradient.

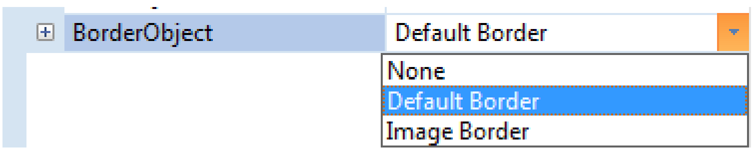


Example using the Gradient option: define the 2 colors using RGB codes:

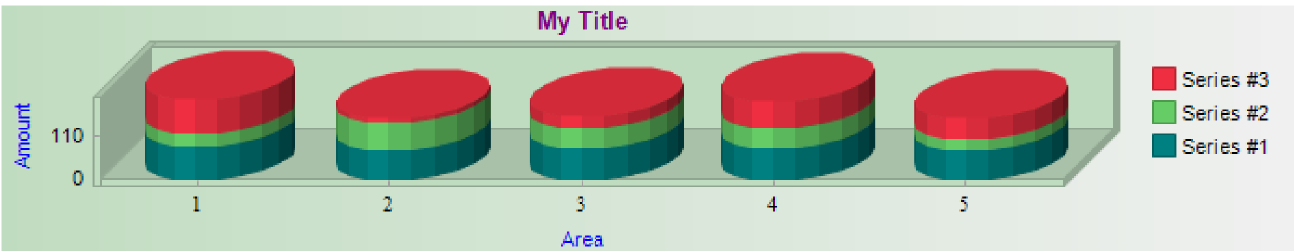


7.4.22. Changing the Chart Border

In the Appearance branch in the right Properties pane, select the **BorderObject** level and choose among None, Default Border and Image Border:



Example **without Border**:



Click the + sign before BorderObject to see additional options.

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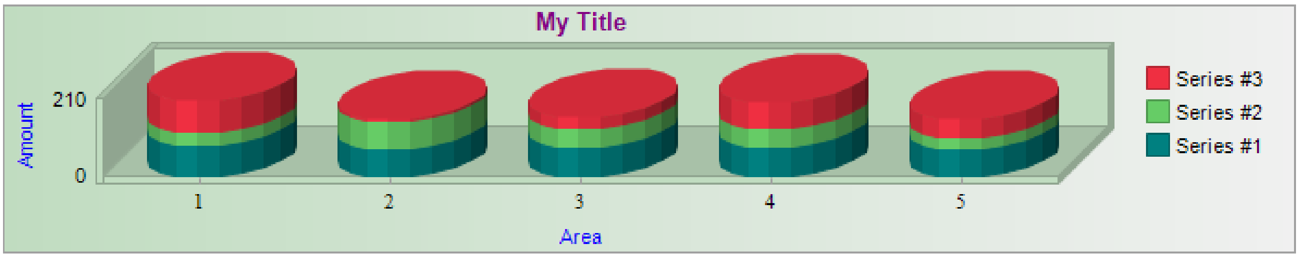
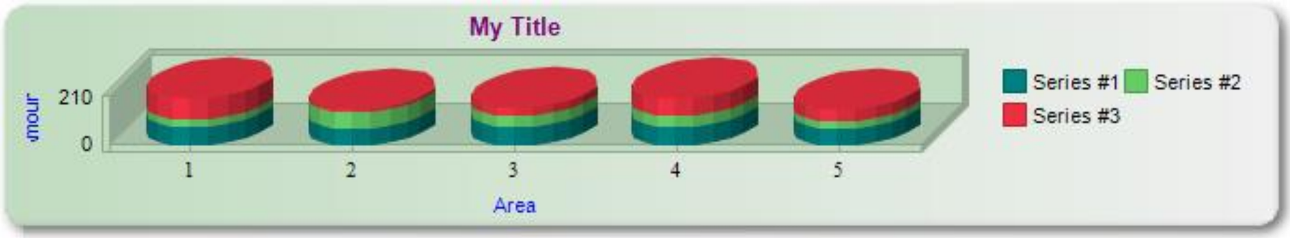
Example with **Default Border**:



Click the + sign before BorderObject to see additional options.

Example with **Image Border**: note that the **Emboss Type** has been used in this example.



Click the + sign before BorderObject to see additional options.

7.4.23. Changing the Gap Values

Foor Gap values are proposed to modify the margin between the chart and the bounding rectangle. Click the **Gaps** branch level in the right Properties pane:

7.4.23.1. Left Gap

Use the **LeftGap** to define the **left margin** between the chart and the bounding rectangle. The Type is **Integer**.

The specified value sets the distance in pixels between the left border of the bounding rectangle and the chart.

Example: To set a left margin of 60 pixels, enter 60 in the LeftGap box.

7.4.23.2. Top Gap

Use the **TopGap** to define the **top margin** between the chart and the bounding rectangle. The Type is **Integer**.

The specified value sets the distance in pixels between the top border of the bounding rectangle and the chart.

Example: To set a top margin of 10 pixels, enter 10 in the TopGap box.

7.4.23.3. Right Gap

Use the **RightGap** to define the **right margin** between the chart and the bounding rectangle. The Type is **Integer**.

The specified value sets the distance in pixels between the right border of the bounding rectangle and the chart.

Example: To set a right margin of 40 pixels, enter 40 in the RightGap box.

7.4.23.4. Bottom Gap

Use the **BottomGap** to define the **bottom margin** between the chart and the bounding rectangle. The Type is **Integer**.

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The specified value sets the distance in pixels between the bottom border of the bounding rectangle and the chart.

Example: To set a bottom margin of 50 pixels, enter 50 in the BottomGap box.

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