

SQL2report User Manual

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1. Versions

Version control		
Version	Date	Changes
0.1.0	23/10/2013	Original Version
0.1.1	26/10/2013	• BUGFIX: Dynamic links to images, using Mage::getBaseUrl
0.1.2	02/10/2014	• BUGFIX: Handle database with prefixes.
0.2.0	03/04/2014	• NEW FEATURE: When changes are made, a save icon is shown on the menu (in case you forget to save) • NEW FEATURE: Permissions to see/edit by roles • NEW FEATURE: Informs with charts. • NEW FEATURE: Import and export reports. • CHANGE: In informs and filters the description is now the title. • NUCLEO: Code ordinance cleanliness and improves updating system. • BUGFIX: Exportation of reports without filters.
0.2.1	12/04/2014	• NEW FEATURE: Import zip. • BUGFIX: Installation Script.
0.3.0	21/08/2014	• NEW FEATURE: Type of evaluated filter, where you can put a PHP and the result of this evaluation will be replaced by the parameter chosen. For example you can use the username registered with the sentence. Mage::getSingleton('admin/session')->getUser()->getUsername() and use it in the parameter :USER_NAME in a SQL sentence. • NEW FEATURE: Type of visualization with list of filters. Filters such as select or set where shown in the view reports as pull-down menu and you could only choose one. Now it is possible to configure it as a list; if you want to, also as a radio buttons or by check with multiples choices. • NEW FEATURE: Links: It is possible create links to drive the reports data to webpages depending value. For example, if a report is displayed products, can be set up so that if you link to a product go to the page of Magento editing of that product, you can configure row links as well as column links, and also choose if you want the link to open in new windows or in the same one. • NEW FEATURE: SVN parameter text qualifier: New parameter in export parameter where it is possible to indicate when data is exported in SVN and which symbol includes the text. • NEW FEATURE: SQL visualization when the data of a report is seen. Before, to see the SQL button, beside the "Show Report" bottom. Now is shown in a pull-down bar. • NEW FEATURE: Totals in reports consults: when a report is launched, if the data of a column are numbers, at the bottom of the report an addition with all the values is shown.
0.3.1	29/09/2014	• BUGFIX: The codes of the reports and the filters allow again capital letters. • BUGFIX: The table's prefix parameter is replaced before the rest of the filter parameters. • BUGFIX: Solution to the problem that didn't allow to create new filters.

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0.4.0	12/05/2015	• NEW FEATURE: Possibility of configure a styles format when you are going to export an excel data, being allowed to configure the header style, pair and impair rows. Columns now are auto-adjustable with respect to the width of the data • NEW FEATURE: Periodically auto-execution of reports, sending by email the exportation selected (Excel or CSV). • NEW FEATURE: Association of columns with equal values from left to right. • NEW FEATURE: Report market
0.4.1	17/08/2015	• NEW FEATURE: Pagination of results • NEW FEATURE: Filter results • NEW FEATURE: New filter select with search option • NEW FEATURE: Improvements in cron: log, sending email per row and new parameters to insert the values of the results. • NEW FEATURE: Running Reports in another database

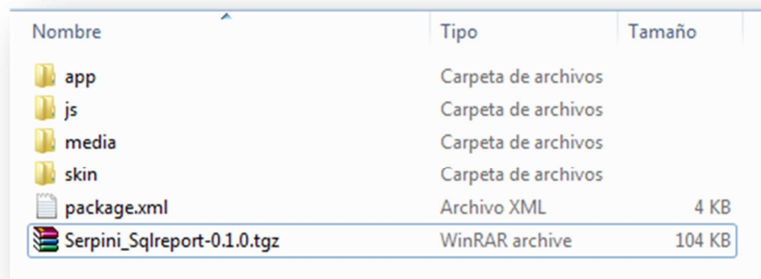
2. Installation

After purchasing the plugin you will obtain zip file with a name like *Serpini_Sqlreport-X.X.X.tgz*. For being able to unzip that file, it is necessary to use an unzip program such us WinRAR from the company Rarlab.

Install Files.

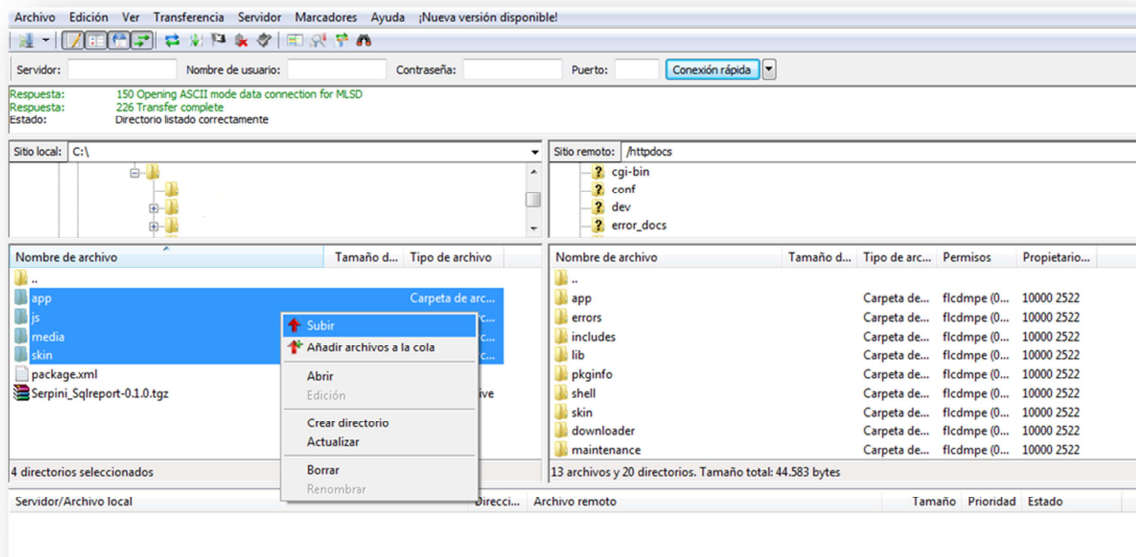
The *Serpini_Sqlreport-X.X.X.tgz* Zip file has every plugin file. To install it, you must copy all the files in the root of the installation of Magento.

1. Unzip the file in a folder.



2. Upload the file to the server:

We will take this step with a ftp client such as FileZilla and we will connect to Magento installation root. We'll only upload folders, we don't have to upload neither the zip file nor the *package.xml* file.

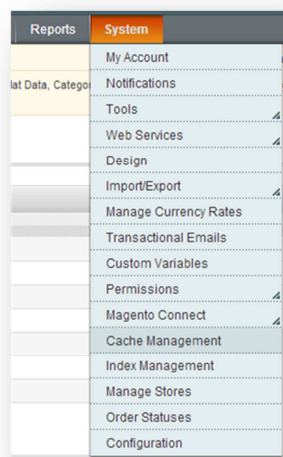


Configure Magento.

On this step, we'll update Magento's cache so that it can detect the new plugin and we will start up the plugin for the first time.

1. Flush magento cache:

for that we'll go to *System-> Cache Management* menu in Magento's backend.



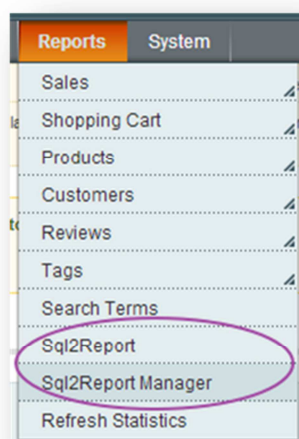
We will press “Flush Magento Cache” and “Flush Cache Storage”



It will appear a message telling that the Magento cache storage has been flushed.



2. **Execute the plugin for the first time:** Once the plugin is installed, in the backend of Magento, appear two new submenus in the Reports menu.



Sql2Report: Report Viewer.

Sql2Report Manager: Reports manager.

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We'll select this option: *Reports -> Sql2Report Manager*

As we enter for this first time in the manager screen, this system will create as tables as it needs and will import the example reports indicating if everything went as expected by a message.



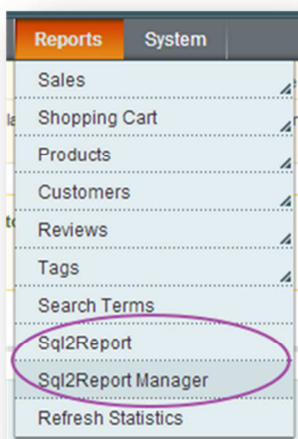
We'll have the plugin installed and ready to be used.

3. Use Manual

Sql2report has two main units:

- **Sql2report Manager:** Plugin creator, where you can create reports, filters, groups, links, export, import and configure the plugin parameters.
- **Sql2report Viewer:** Report Viewer, where you can execute a report to see the data, its chart and export data to Excel or CSV files.

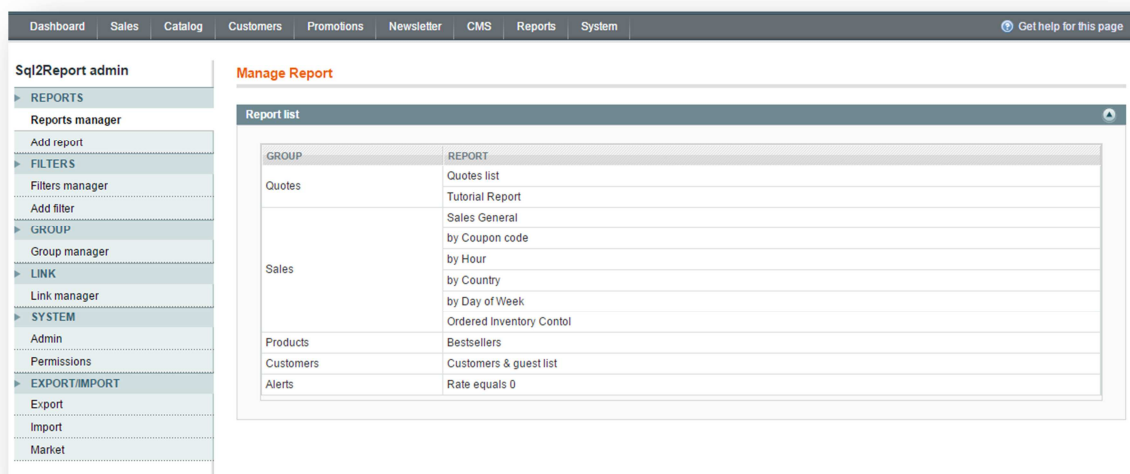
To enter in each one of the units, in Mangento's Backend you will see both options in Report menu.



3.1. Sql2report Manager

In this unit you can configure the plugin, create reports, filters, groups, links, export and import reports.

Once you enter the unit, you can display the reports list and the menu on the left side.



3.1.1. Reports.

Once you click in the menu *REPORT* → *Reports manager* it will be appear a list with all the reports, and from here we can select a report to edit or delete.

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3.1.1.1. Create Report

Once you click in the menu REPORTS→Add report will display a screen to create a report, the screen is grouped by the most important parts of a report:

The screenshot shows the 'Add Report' form in the Sql2Report admin interface. The form is divided into three main sections: General information, SQL, and a list of report types. The General information section contains fields for Code, Title, and Group. The SQL section contains a text area for the SQL query. The report types list includes Filters, Chart, Links, Excel export format, and Cron.

- **General information:** information that identifies the reports, which values are:

The screenshot shows the 'General information' section of the 'Add Report' form. It contains three fields: Code (with value 'QUOTE_LIST'), Title (with value 'Quotes list'), and Group (with value 'Quotes'). Each field has a 'STORE VIEW' button next to it.

- o **Code:** Unique code of report, its value is a text without spaces.
 - o **Title:** Report's title, it will appear on the reports list.
 - o **Group:** Where the report belong.
- **SQL:** SQL sentence of the report, in which you can use the following metatags.

The screenshot shows the 'SQL' section of the 'Add Report' form. It contains a text area with the following SQL query:

```
1 SELECT A.store_id,
2       DATE_FORMAT(A.created_at, '%Y-%m-%d') as 'Created date',
3       DATE_FORMAT(A.updated_at, '%Y-%m-%d') as 'Updated date',
4       CONCAT(ROUND((A.base_subtotal*A.base_to_global_rate),2),',',A.global_currency_code) as base_subtotal,
5       CONCAT(ROUND(((A.base_subtotal*A.base_to_global_rate)- (A.base_subtotal_with_discount*A.base_to_global_rate)),2),',',A.global_currency_code) as base_subtotal_with_discount,
6       CONCAT(ROUND(A.base_grand_total*A.base_to_global_rate,2),',',A.global_currency_code) as base_grand_total,
7       A.customer_id,
8       A.customer_email,
9       A.customer_firstname,
10      A.customer_middlename,
11      A.customer_lastname,
12      A.coupon_code
13 FROM @sales_flat_quote A
14 WHERE DATE_FORMAT(A.created_at, '%Y-%m-%d') BETWEEN :STARTDATE AND :ENDDATE
15 AND (:STORE_ID='ALL' OR A.store_id=:STORE_ID)
16 ORDER BY 1,2,3,4
```

- o **@ (at):** It will be replaced by the prefix of the tables of Magento, for installations whose tables of Magento have prefix, it is good to put a @ in front of the names of the tables, for example

FROM @sales_flat_quote

- o **: (two points):** When you use SQL sentences with filters, it is necessary to place two points in front of the name of the filter's parameter in case of for

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example "Start Date" filter has this parameter STARTDATE configured, in the SQL sentence it can be used this way

WHERE DATE_FORMAT (A.created_at, '%Y-%m-%d') **BETWEEN**:STARTDATE **AND**:ENDDATE

A recommendation to the hour of filter by dates is trunc the date, but it will also be filtered by hour and minute, this could cause that does not take the data of the day :ENDDATE.

- **Filters:** Filters that you can use in the SQL sentence. To add a filter, we select it on the top list and press "Add Combo" button, and the filter will appear on the list below. To delete a filter we select it from the list below and press "Remove Combo". You can also indicate the order in which display module will appear by clicking arrows.

The screenshot shows a window titled "Filters" with two tables. The top table lists available filters, and the bottom table shows filters currently added to the report.

COMBO CODE	COMBO PARAMETER	COMBO TITLE	COMBO TYPE
CBC_USER_NAME	USERNAME	User name	evaluated
CBO_TEXT	TEXT	Texto	text
CB_CUSTOMER_GUEST	TYPECUSTOMER	Customer or guest	set

Buttons: Add Combo, Remove Combo

COMBO CODE	COMBO PARAMETER	COMBO TITLE	COMBO TYPE	ACTIONS
STORE_SELECT	STORE_ID	Show Report For	select	↑ ↓
CB_STARTDATE	STARTDATE	Start Date	date	↑ ↓
CB_ENDDATE	ENDDATE	End Date	date	↑ ↓

- **Chart:** Chart of the report. We can choose between those option:
 - o Linear.
 - o Areas.
 - o Bars.
 - o Multibars.
 - o Horizontal bars.
 - o Cake.
 - o Donut.

The screenshot shows a window titled "Chart" with several chart type icons (Line, Area, Bar, Multibar, Horizontal bar, Pie, Donut). Below the icons are input fields for "X value" (set to 1) and "Y value" (set to 2). There is also a "Column number" field with a "+" icon and the text "Column number".

Once the type of chart is selected, pressing on its image, it will appear the option to indicate which data column will fill up the data of X axis and Y axis. You only have to put the column number starting by one. On charts that it's possible to add more axis, such as areas or donut, we can add a new column pressing "Column number".

- **Links:** Links on the report data. There are two insert options:

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The 'Links' window contains two sections: 'Row link' and 'Column links'.

Row link

ID	DESCRIPTION	URL
LK_TR_CUSTOMER_EDIT	Link to customer edit	adminhtml/customer/edit/id/<CUSTOMER_ID>
LK_TR_ORDER_EDIT	Link to order edit	adminhtml/sales_order/view/order_id/<ORDER_ID>
LK_TR_PRODUCT_EDIT	Link to edit <PRODUCT_NAME>	adminhtml/catalog_product/edit/id/<PRODUCT_ID>

Column links

Column	ID	DESCRIPTION	URL
☐	LK_TD_CUSTOMER	Link to customer	adminhtml/customer/edit/id/
☐	LK_TD_PRODUCT	Link to product	adminhtml/catalog_product/edit/id/
☐	LK_TD_PRUEBA	Link prueba <VARIABLE>	admin/id/<VARIABLE>

- o **Row link:** Each report can only have one row link. We select a row link from the list of possible links. Once it's selected we configure each link parameter, what column number includes the value. To unselect the created link, we press "unselect" and it'll show the list of possible links.

The 'Row link' configuration window shows the following fields:

- Unselect** (button)
- Id:** LK_TR_CUSTOMER_EDIT
- Description:** Link to customer edit
- Url:** adminhtml/customer/edit/id/<CUSTOMER_ID>
- CUSTOMER_ID ***: 1 | Column number

- o **Column links:** Each report can have as many links as columns it has. To use a column link, on the left of each link, indicate (in which column it will be used, in which the possible parameters will be filled up with the column value) and so you can use them in the URL or in the link title
- **Excel export format:** Excel format generated when you export from the display module. You can use the default setting that can be modified in SYSTEM→Admin→Export Parameters.

The 'Excel export format' window shows the following configuration options:

- by Default** (selected) / Customized
- Header:** Arial, 10, Bold, Italic, Underline, Text color, Background color, Border
- Odd row:** Arial, 8, Bold, Italic, Underline, Text color, Background color, Border
- Even row:** Arial, 8, Bold, Italic, Underline, Text color, Background color, Border

- **Cron:** Periodical auto-execution of the report. You can set up a report to execute periodically. So if we want a report to execute every day at 10 a.m and the result data to be sent to our email in Excel format. For that we will have to activate the Cron in the "active" square. And we'll configure the following sections:

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Cron

☒ Active

When

[Reset](#)

Minute

Hour

Day of Month

Month

Day of Week

Every Minute

Every n minutes

Each Selected Minute

Every 10 minutes

Filter's value

Show Report For*

admin

[Add to Content](#)

Customer or guest*

Customers & guest

[Add to Content](#)

Email

Subject *

Dear :C5C :C6C

To *

:C3C

CC

BCC

Attach file *

No attach

No rows send

☐ Ative if you don't want the email to be send if report don't return rows

Email per row

☒ Ative if you want send an email for each result row, you can use the parameters :CX where X is the number of the column.

Content *

[Show / Hide Editor](#)

[Add results table](#)

<p>Dear :C5C :C6C</p>
<p>Your email is :C3C</p>
<p>Street :C7C</p>
<p>City :C8C</p>
<p>Telephone :C11C</p>

File generated

Path *

C:\wamp\www\sql2report\media\userpini_sqlreportier

Save *

☒ No Save

☐ Save

Log

Select All

Unselect All

Actions

[Submit](#)

Date	To	Cc	Bcc	Subject	Content	Status
☐ 2015-05-19 18:36:41	linda@example.com			Dear Linda Wood		
☐ 2015-05-19 18:36:39	donald@example.com			Dear Donald Hertz		
☐ 2015-05-19 18:36:38	john@example.com			Dear John Hernandez		

- o **When:** When will the report be executed, will have to indicate the days of the week, the months, the days of the month, the hour and the minutes.
- o **Filter's value:** If the report has any associated filters here we will indicate of each one of them. If you do click on [Add to Content](#) button, the parameter insert into email part, the value of de parameter will be replaced in the content of the email.
- o **Email:** When the report is executed an email with the data will be sent. We will indicate if the data should be sent as a CSV or an Excel and the message body which can be in HTML
- o **File generated:** When the report is run, an Excel or CSV file is generated as we indicated in the previous section, the "Path" field will indicate where to build

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it and Save this file will indicate if we want to store or deletion. The file format is generated name codigoInforme_YYYYMMDDHHmm.

- o **Log:** At the end of the section Cron, we can see the history of past executions executed by cron

File generated

Path *

Save * ☒ No Save ☐ Save

Log

Select All | Unselect All Actions

Date	To	Cc	Bcc	Subject	Content	Status
☐ 2015-05-19 18:36:41	linda@example.com			Dear Linda Wood		
☐ 2015-05-19 18:36:39	donald@example.com			Dear Donald Hertz		
☐ 2015-05-19 18:36:38	john@example.com			Dear John Fernandez		

Once we have set up all the sections, we will press the button “Add report” and then a “Report added” message will be shown.

Dashboard Sales Catalog Mobile Customers Promotions Newsletter CMS Reports System [Get help for this page](#)

Report added

Sql2Report admin

- REPORTS
 - Reports manager
 - Add report**
- FILTERS
 - Filters manager

Manage Report: Example report product list

General information

SQL

```
1 SELECT A.entity_id,  
2       B.attribute_code,  
3       B.frontend_label,  
4       A.value,
```

3.1.1.2. Report Editing

Once you click in *REPORTS* → *Report Manager* will show us a list of the reports.

Dashboard Sales Catalog Customers Promotions Newsletter CMS Reports System [Get help for this page](#)

Sql2Report admin

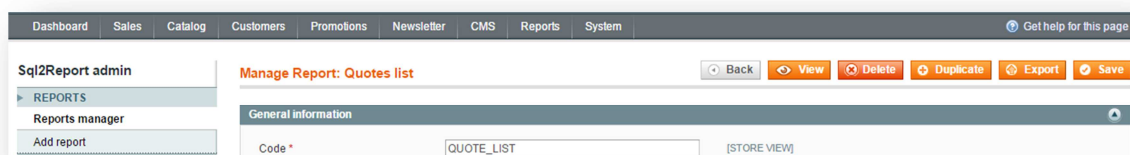
- REPORTS
 - Reports manager
 - Add report
- FILTERS
 - Filters manager
 - Add filter
- GROUP
 - Group manager
- LINK
 - Link manager
- SYSTEM
 - Admin
 - Permissions
- EXPORT/IMPORT
 - Export
 - Import
 - Market

Manage Report

Report list

GROUP	REPORT
Quotes	Quotes list
	Tutorial Report
	Sales General
	by Coupon code
Sales	by Hour
	by Country
	by Day of Week
	Ordered Inventory Control
Products	Bestsellers
Customers	Customers & guest list
Alerts	Rate equals 0

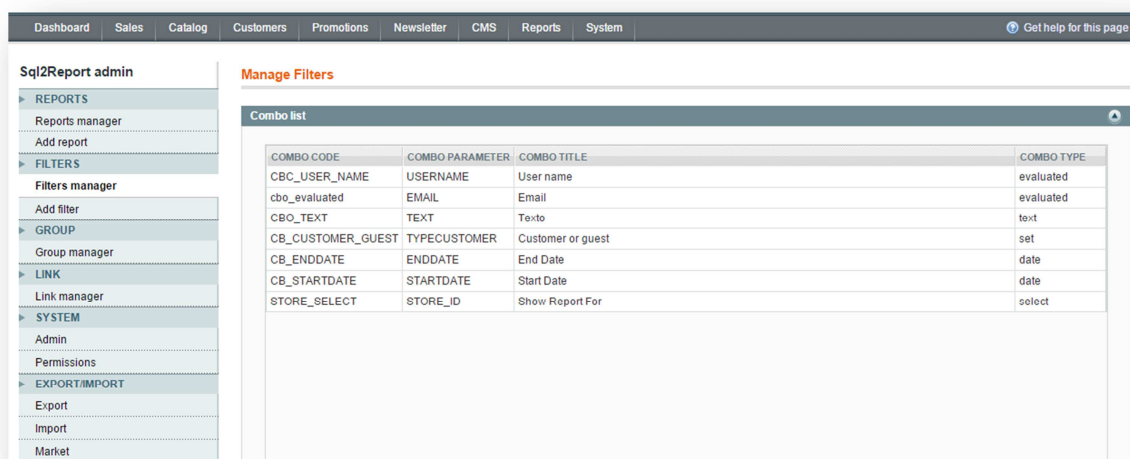
To edit a report, we will click the report we want to modify and a similar window to the one for adding reports will appear, but now with the following options:



- **Back:** Goes back to the report list window.
- **View:** Opens the report display module with the selected report.
- **Delete:** Deletes the report, it doesn't delete the filters, nor the links associated the report.
- **Duplicate:** Loads the add report window filling up the blank, with the save data of the current report.
- **Export:** Generate a file .json so it can be imported or do a backup.
- **Save:** Save the changes.

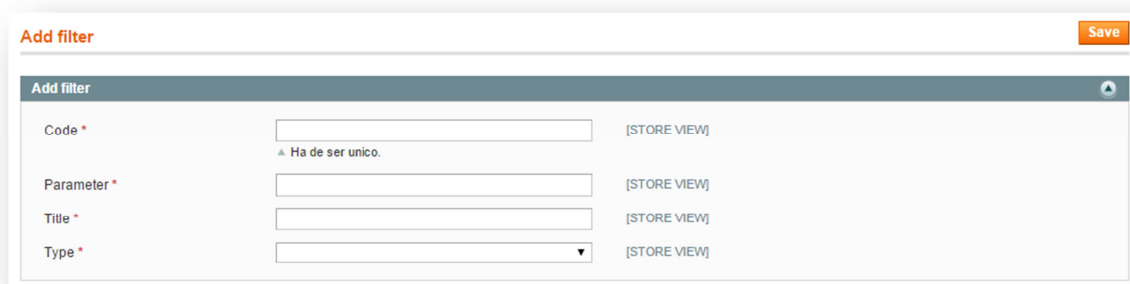
3.1.2. Filters.

When you click in the menu *FILTERS* → *Filters manager* will show us a list with all the filters, from here we will be able to select a filter to edit it or delete it.



3.1.2.1. Create Filter.

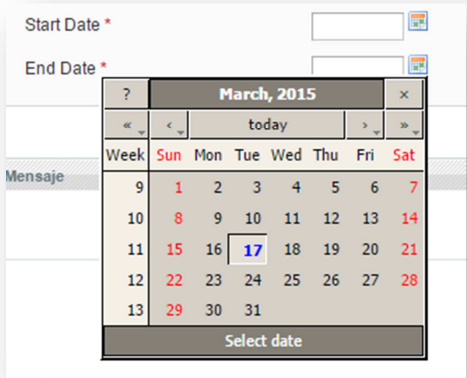
When you click in the menu *FILTERS* → *Add filter* will show us the screen to create a filter and the next values will have to be filled up.



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- **Code:** Unique code of the filter, it has to be written without spaces.
- **Parameter:** Associated parameter, this parameter will be associated in the SQL sequence, been replaced by its value when a value is selected in the display module. The value has to be a text without spaces.
- **Title:** Title of the filter.
- **Type:** Type of the filter which can be:
 - o **Date:** Date selector. In the display module you will be able to select a date.



- o **Select:** SQL sentence. It is used when the values are directly taken from the database. The output result has to be two columns; the first one being the value that will be a sign to the parameter and the second one a description of the value. In the SQL sentence you can also use the tag @ in front of the tables and to be replaced by the prefix of the Magento tables.

The image shows a configuration interface for a filter. It has a 'Type *' dropdown menu set to 'select'. To the right of the dropdown is a '[STORE VIEW]' label. Below the dropdown is a 'List type *' section with four radio button options: 'Select list unique value', 'Select list unique value with search' (which is selected), 'Radio unique value', and 'Checkbox multiple value'. To the right of these options is a label 'Show result like checkbox or select box'. At the bottom of the interface is a text area containing the following SQL code:


```
1 SELECT 'ALL','All Websites' FROM dual
2 UNION ALL
3 SELECT store_id,code FROM @core_store
4
```

The list that will be shown in the display module can be of three types:

- **Select list unique value:** A dropdown will be shown in which you can only select one value.

The image shows a dropdown menu labeled 'Show Report For *'. The dropdown is open, showing a list of options. The first option is 'All Websites', which is highlighted. To the right of the dropdown is a button labeled 'SQL' with a blue icon.

- **Select list unique value with search:** A dropdown will be shown in which you can only select one value and a field appears to search among the possibilities.

Show Report For *

All Websites

admin

default

french

german

Page 1 of 3 Pages | View

Type	Customer id
Customer	24

- **Radio unique value:** All the values will be shown with a selector to the left and only one value could be chosen.

Show Report For *

☒ All Websites

☐ admin

☐ default

☐ french

☐ german

- **Checkbox multiple values:** All the values will be shown and several of them could be selected. The value list will be assigned separated by coma, each value in quotation marks and with parentheses at the beginning and end mostly used with an **IN**

```
18 AND a.store_id IN ('ALL','1')
19 ORDER BY 1,2,3,4
```

Filter

Show Report For *

☒ All Websites

☐ admin

☒ default

☐ french

☐ german

- o **Text:** Free text field. In the display module a field where we can put the text we want will be shown. The value will be replaced with quotation marks

Texto *

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- o **Set:** List of static values. For the list where we don't want the values the picked up by the DDBB because we want to set them up manually, we will go one by one through all the values indicating in the table which value we want to replace in the parameter and the description. To add a new value to the table we just have to press tabulation in the last value and a new row will be added to the table. Just like in the filter type "select" we can indicate have we want the values to be shown (Select list unique value, Radio unique value, Checkbox multiple value).

Type *

set

[STORE VIEW]

List type *

☒ Select list unique value

☐ Select list unique value with search

☐ Radio unique value

☐ Checkbox multiple value

Show result like checkbox or select box

VALUE	DESCRIPTION
ALL	Customers & guest
CUSTOMER	Customers
GUEST	Guest

- o **Evaluated:** For more experienced Magento users, it is possible to indicate a PHP expression for the result of the expression to be assigned to the parameter. The filter won't show up on the display module and it will not possible to change it in that module. For example if we just want a report to my show us a list of products depending on the user that is logged in, we can insert the expression.

`Mage::getSingleton('admin/session')->getUser()->getUsername()`

Add filter

Code *

CBC_USER_NAME

[STORE VIEW]

Parameter *

USERNAME

[STORE VIEW]

Title *

User name

[STORE VIEW]

Type *

evaluated

[STORE VIEW]

Expression *

Mage::getSingleton('admin/session')->getUser()->

php statement to evaluate

The value of the expression will be replaced by the parameter, so if the result, we will have to put quotation marks between the parameter in the SQL

```
18
19 WHERE email = ':USERNAME'
```

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```
18  
19 WHERE email = 'admin'
```

Once we have set up all the data of the filters we press the bottom “Save” and a message saying “combo added” will appear, and we will now be able to use that filter in the reports.

Combo added

Sql2Report admin

- REPORTS
- Reports manager
- Add report

Add Filter

Back Save Delete

Add filter

Code * FILTER_ATTRIBUTES_PRODUCTS [STORE VIEW]

3.1.2.2. Filter Editing

When you click in *FILTERS* → *Filter Manager* will show us a list of the filters..

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Sql2Report admin

- REPORTS
- Reports manager
- Add report
- FILTERS
- Filters manager
- Group manager
- LINK
- Link manager
- SYSTEM
- Admin

Manage Filters

Combo list

COMBO CODE	COMBO PARAMETER	COMBO TITLE	COMBO TYPE
CBC_USER_NAME	USERNAME	User name	evaluated
CBO_TEXT	TEXT	Text	text
CB_CUSTOMER_GUEST	TYPECUSTOMER	Customer or guest	set
CB_ENDDATE	ENDDATE	End Date	date
CB_STARTDATE	STARTDATE	Start Date	date
STORE_SELECT	STORE_ID	Show Report For	select

To edit a filter, we will just have to click in the filter that we want to edit and a similar window to the add filters will be shown, but now with the following options:

Sql2Report admin

- REPORTS
- Reports manager
- Add report
- FILTERS
- Filters manager

Manage filter STORE_SELECT

Back Save Delete

Add filter

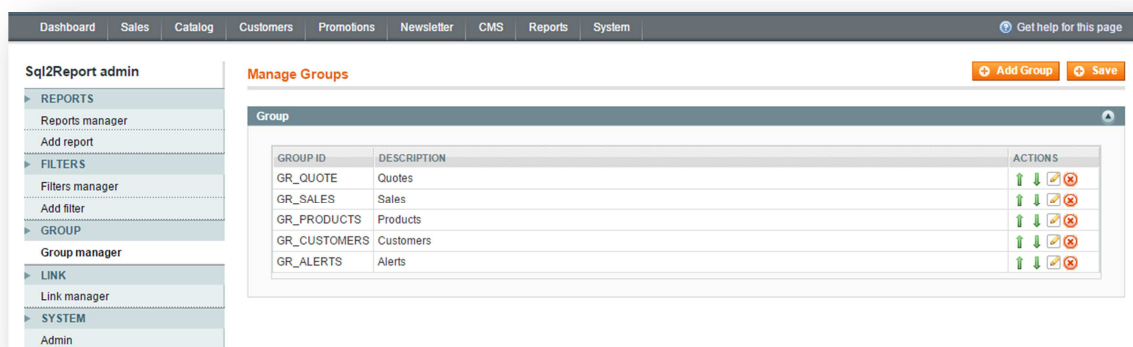
Code * STORE_SELECT [STORE VIEW]
▲ Ha de ser unico.

Parameter * STORE_ID [STORE VIEW]

- **Back:** Goes back to the filter list.
- **Save:** Saves the changes.
- **Delete:** Deletes the filter.

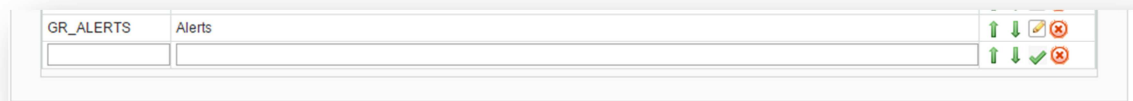
3.1.3. Groups.

We can gather the reports in groups, using the option *GROUP* → *Group manager*, we can create, edit and delete groups, once we enter the section the list of available groups will appear.



3.1.3.1. Create Group

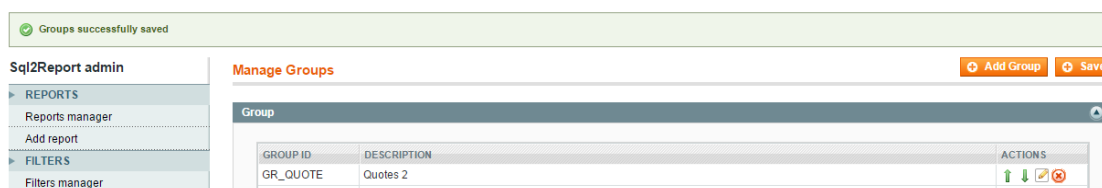
To create a group in the section GROUP→Group manager we press the button “Add Group”, a new line will appear in the group table, there we will fill up the group code, which has to be unique and without spaces, the description and then we will push the tick button .



The group will be able already to be selected in the reports.

3.1.3.2. Edit Group.

To edit a group in the section GROUP→Group manager we press the pencil button  next to the group that we want to edit, we will only be able to edit the group description, when we finish the change, we press the tick button  and the “Save” button, and a message saying “Groups successfully saved” will appear.



3.1.4. Links.

When the data of a report is shown on the display module, by default if all the data is of the correct type a link to send an email will be inserted:

User manual

Document: Sql2report User Manual.docx

Order id	Order Number	Order Date	customer_email	Product Name Ordered	Sku	product_id
41	100000049	Mar 15, 2013	mosses@ebay.com	Classic Hardshell Suitcase 29"	abl007	377
42	100000051	Mar 28, 2013	robert@gmail.com	Chelsea Tee	mtk004	409
43	100000052	Mar 28, 2013	jill@gmail.com	Elizabeth Knit Top	wbk012	421
44	100000053	Mar 28, 2013	haven@yahoo.com	Houston Travel Wallet	abl004	374
				NoLita Cami	wbk002	417
				Modern Murray Ceramic Vase	hdd001	387
					hdd002	388
46	100000055	Mar 28, 2013	rack@gmail.com	Ann Ankle Boot	aws006	431

It is possible, that link in the example where data from orders and products is shown, when you click on a row, you can see that order or when you push on the product ID, you can see the product.

Because of that, they are two kinds of links:

- **Row Links:** To from the URL, they can use data from several columns and the link is done when you click over the whole row.
- **Column Links:** To from the URL, it picks up the value of each cell, this way the link is done over each cell like with the email.

3.1.4.1. Row Links

To **add** a row link, we go to **LINK** → **Link manager**, where we can see the list with the row links

ID	DESCRIPTION	URL	ACTIONS
LK_TR_CUSTOMER_EDIT	Link to customer edit	adminhtml/customer/edit/id/<CUSTOMER_ID>	✖
LK_TR_ORDER_EDIT	Link to order edit	adminhtml/sales_order/view/order_id/<ORDER_ID>	✖
LK_TR_PRODUCT_EDIT	Link to edit <PRODUCT_NAME>	adminhtml/catalog_product/edit/id/<PRODUCT_ID>	✖
			✖

We click on the button “Add row link” and a new row will show up on the table, where we fill up:

- **ID:** Unique code of link, it has to be text without spaces.
- **Description:** Link's description, it will also appear as the title of the link when you leave the cursor on the row. You can create new parameters for the titles to look nice.
- **URL:** Link's route. If a parameter is needed for the route like the ID of the product or the order, put the value of the order between curly brackets, for example, “adminhtml/catalog_product/edit/id/<PRODUCT_ID>”

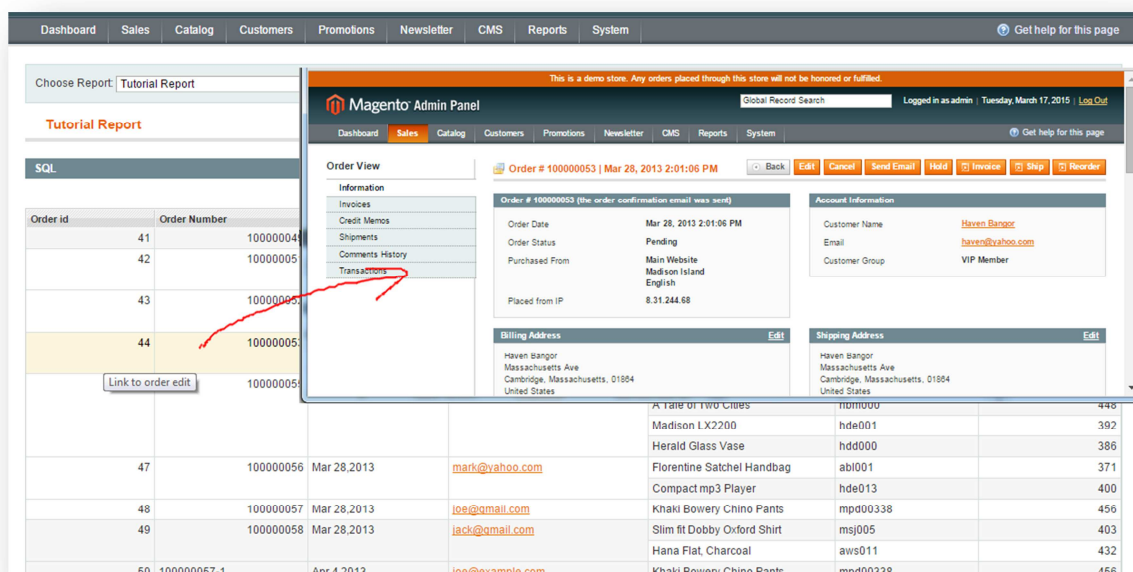
To add the link, we click on the save button .

To **edit** a link, we click over the value that we want to edit, the field will enter edit mode, to exit you just have to click anywhere outside and the link will be saved.

In the display module, when a report has a row link associated, if we click on any part of the row, it will take us to the page that we had set up, so in the example if we click on the row with order_ID 44, it will take us to the edit screen of that order.

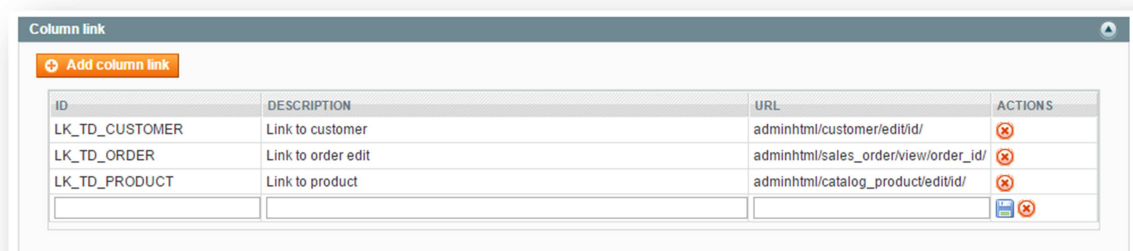
User manual

Document: Sql2report User Manual.docx



3.1.4.2. Column Links.

To add a column link, we go to **LINK** → **Link manager**, where we can see the list of column links.



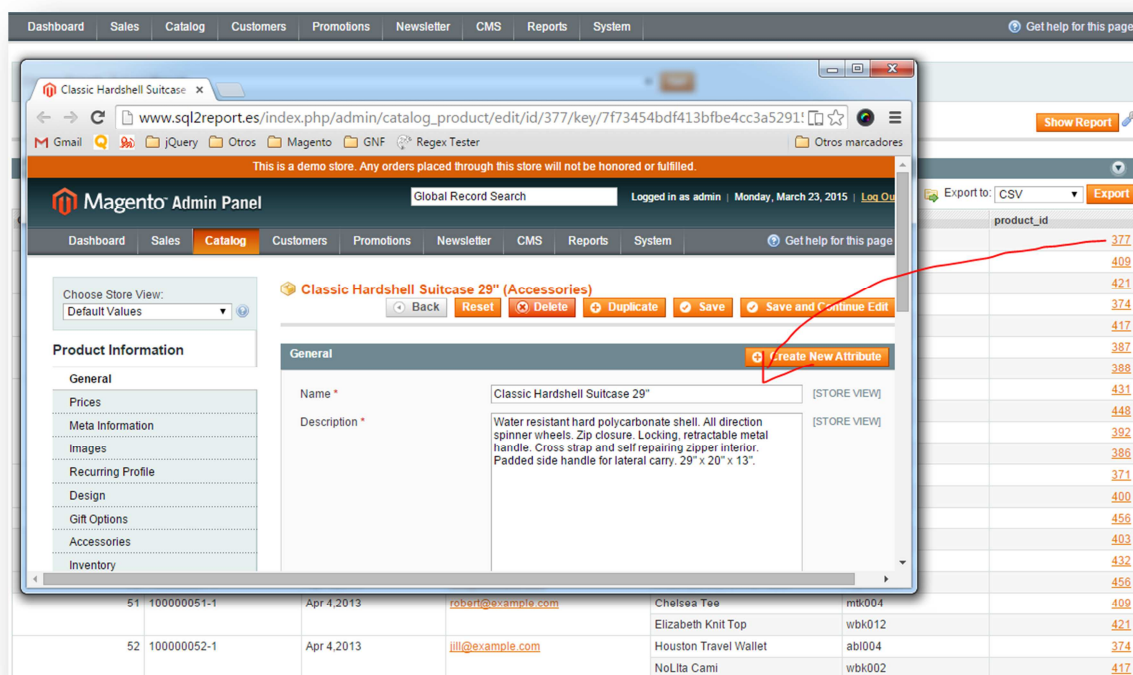
We click on the button "Add column link" and a new row will appear on the on the table, where we will fill up:

- **ID:** Unique code of the link, it has to be text without spaces.
- **Description:** Link's description. It will also appear as the title of the link when you leave the cursor on the row.
- **URL:** Link's route.

To add the link we click on the save button .

To **edit** a link, we click on the value that we want to edit, the field will enter edit mode, to exit you just have to click anywhere outside and the link will be saved.

In the display module, when a report has a column link associated, if we click on the value of the cell, it will take us to the page that we had set up.



3.1.5. Plugin Setup.

They are certain parameters that are set up by default, like the Excel formats and certain configurations that we might want to change.

Also if we want to create an intelligent permission system, in which one report can only be seen by a few users, it can be done in the permissions.

3.1.5.1. Parameters.

To set up the default plugin parameters, we have to click on *SYSTEM* → *Admin*, it will show the parameters sorted by groups.

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The screenshot shows the 'System admin (0.4.1)' configuration page. The left sidebar contains the following navigation links: REPORTS (Reports manager, Add report), FILTERS (Filters manager, Add filter), GROUP (Group manager), LINK (Link manager), SYSTEM (Admin, Permissions, EXPORT/IMPORT (Export, Import, Market)). The main content area has a 'Save' button in the top right corner and is organized into several sections: General Parameters (Prefix Parameter, Prefix Table, Date mask, Path Cron file), Export Parameters (Decimal separator, CSV Column delimiter, CSV export header, CSV text qualifier, Excel header format, Excel Odd Row format, Excel Even Row format), Chart Parameters (Height default), Link Parameters (Target), and Database connection (Host, Database Name, Username, Password, Test Connection button).

- General Parameters
 - *Prefix Parameter*: prefix that identifies a parameter in a SQL.
 - *Prefix Table*: Prefix that identifies the name of a table, the prefix will be replaced by the prefix of the Magento tables.
 - *Date mask*: Format of the dates, both in date filters and in SQL.
- Export parameters
 - *Decimal separator*: Decimal and integer numbers separator when the data is exported.
 - *SVN Column delimiter*: Character separator of the columns when the SVN is exported.
 - *SVN export header*: We will give the value "true" to allow the names of the columns to be exported and "false" to get the opposite result.
 - *SVN text qualifier*: Character that is put at beginning and end of a text when is exported in SVN.
 - *Excel Header format*: Format of the header when is exported by Excel,
 - *Excel Odd Row format*: Format of the impair rows.
 - *Excel Even Row format*: Format of the pair rows.
- Chart Parameters
 - Height default: Chart height on display mode.
- Link Parameter
 - Target: indicates how the will open when a report has rows links or column links, set up with 4 different options (Black, Self, Parent, Top).
- Database connection: In cases in which the reports are to be run on another database, specify connection parameters. You can test the connection by pressing the button "Test Connection" where a message will show whether it has been connected or in error, the error message.

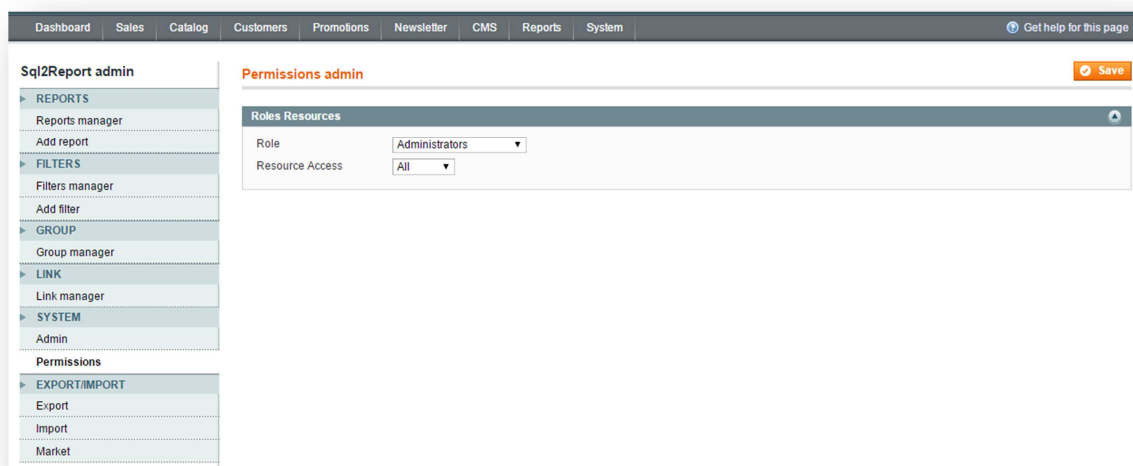
3.1.5.2. Permissions.

For each Magento's role you can set up which options, it can visualize, so you can create roles with permissions of visualization for only some pre-defined reports.

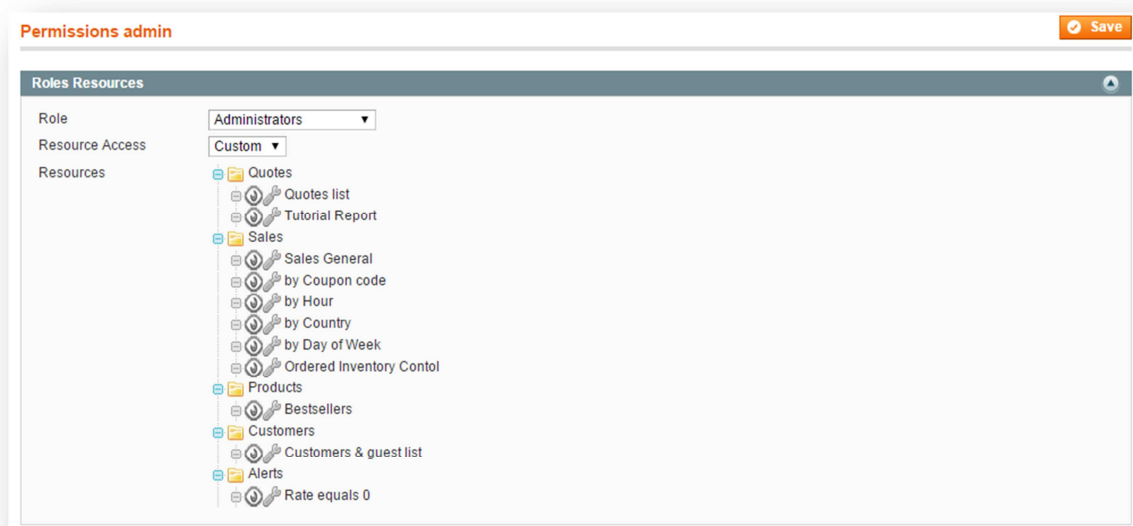
By default, all the roles have whole permission.

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To restrict the permissions of a role, we will choose that role in the selector "Role" and "Resource Access" we'll choose "Custom", it will show us a list of all the reports with the options.



- : The role can see the report on display module.
- : The role cannot see the report on display module.
- : The role can edit the report.
- : The role cannot edit the report.

When we choose "Custom" by default the role is set up not to have permissions for any report.

When we have already set up the role with the permissions we want, press the "Save" button to save the changes.

3.1.6. Export and Import.

On EXPORT/IMPORT menu we can export reports, its setup or the associated filters and links just like import reports.

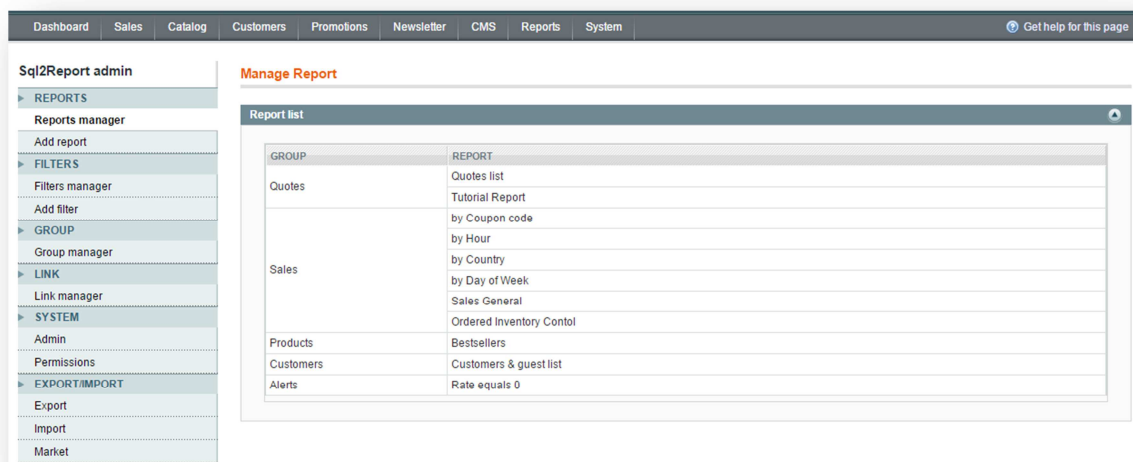
User Manual

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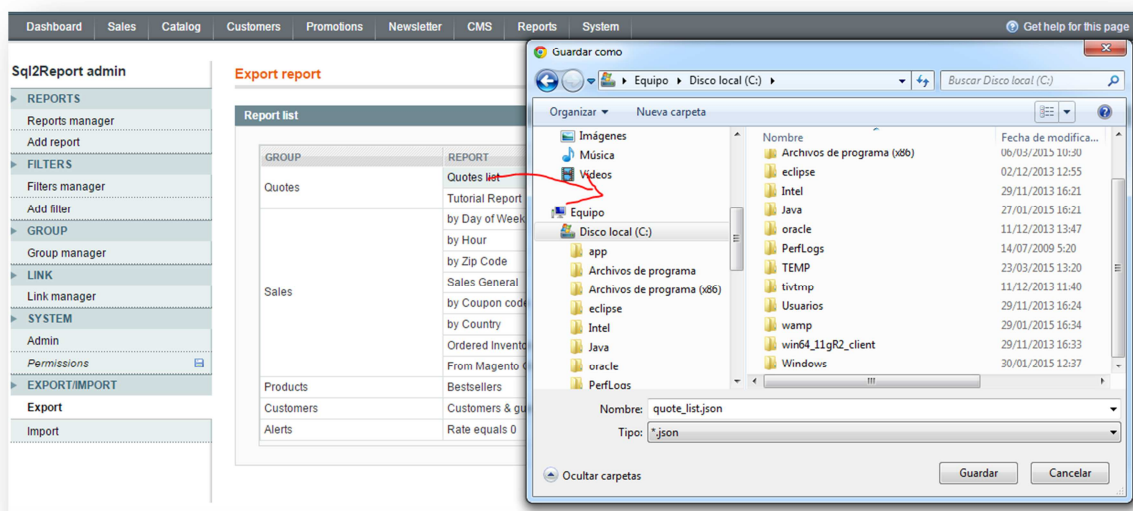
Document: Sql2report User Manual.docx

3.1.6.1. Export.

To export a report, we will go to the EXPORT/IMPORT→Export, and the list of every report will be shown.



If we press any of them, a new window will appear to download the file .json with the report setup; the name of the file will be its code.

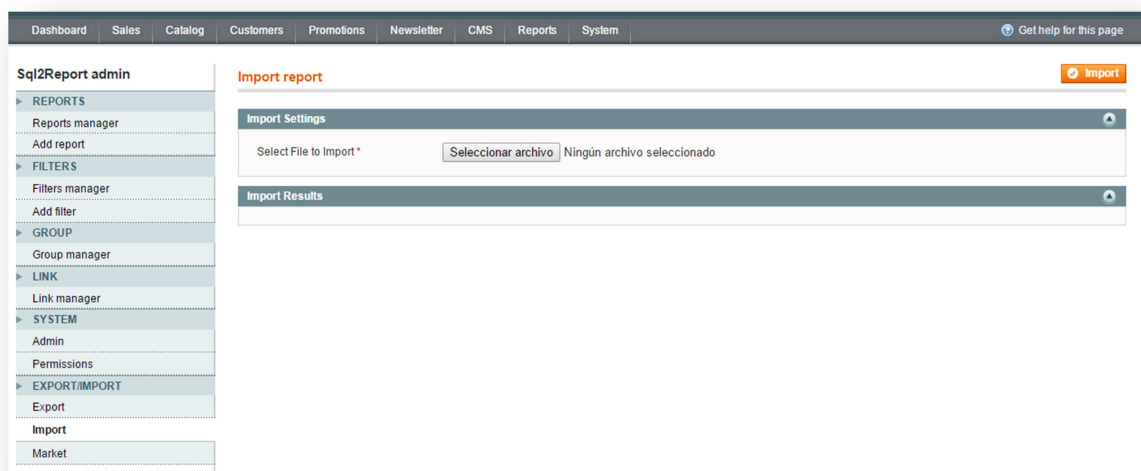


3.1.6.2. Import.

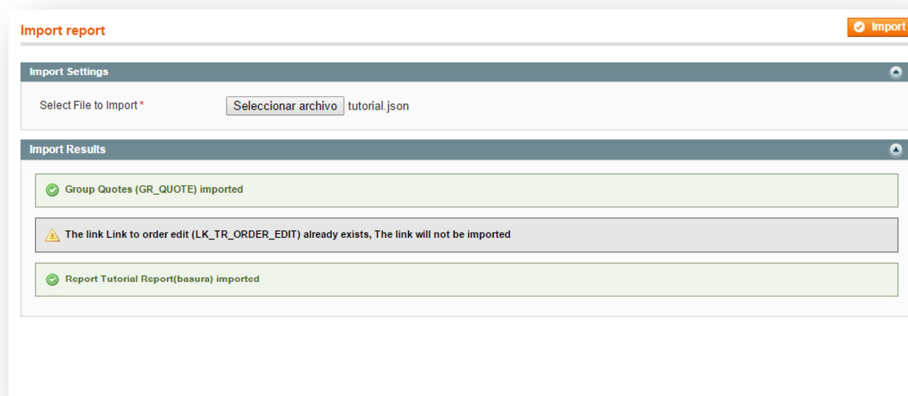
To import a report that must have been previously exported from the plugin we will go to EXPORT/IMPORT→Import, this window will ask which file we want to import.

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We select the file and press the button “Import”, and it will show a list with all the actions that it has done.



If you are importing a filter, a link, or a report that already exists, the filter/link/report will not be imported leaving the configuration of the one that already exists.

3.1.6.3. Market

From the market, we have access to a report repository where we can install new reports and install updates. When we go we all reports appear grouped by groups.

User manual

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Dashboard

Sales

Catalog

Customers

Promotions

Newsletter

CMS

Reports

System

Get help for this page

Sql2Report admin

REPORTS

Reports manager

Add report

FILTERS

Filters manager

Add filter

GROUP

Group manager

LINK

Link manager

SYSTEM

Admin

Permissions

EXPORT/IMPORT

Export

Import

Market

Market

Sales

Title	Version	Description	Action
by Hour	1	Sales Information (number of requests, number of products, subtotal, taxes, transportation costs, discounts and total) grouped by hour of the day.	Delete
by Zip Code	1	Sales Information (number of requests, number of products, subtotal, taxes, transportation costs, discounts and total) grouped by zip code.	Install
by Country	1	Sales Information (number of requests, number of products, subtotal, taxes, transportation costs, discounts and total) grouped by country.	Delete
Sales General	2	Sales Information (number of requests, number of products, subtotal, taxes, transportation costs, discounts and total) grouped by day.	Update
by Day of Week	1	Sales Information (number of requests, number of products, subtotal, taxes, transportation costs, discounts and total) grouped by day of the week.	Delete
by Coupon code	1	Sales Information (number of requests, number of products, subtotal, taxes, transportation costs, discounts and total) grouped by coupon code.	Delete

Quotes

Title	Version	Description	Action
Quotes list	1	Orders that are in carts and have not made the payment reached	Delete

Products

Title	Version	Description	Action
Bestsellers	1	Sales Information (Product Name, Total sales, number of sales) grouped by product name.	Delete

Customers

Title	Version	Description	Action
Customers & guest list	1	Information of all clients and guests.	Delete

Alerts

Title	Version	Description	Action
Rate equals 0	1	Alert conversion rates between currencies equal to 0.	Delete

For each report the market, we can install the new reports, update reports with new versions or delete the report from our system.

New reports

When there is a report on the market that you do not have in your system, it appear in the Actions column the "Install" button, when you pressed, the report will be installed on your system.

by Zip Code	1	Sales Information (number of requests, number of products, subtotal, taxes, transportation costs, discounts and total) grouped by zip code.	Install
-------------	---	---	---------

Update reports

When there is a report with a higher version installed that on your system, It appear in the Actions column the "Update" button, when you pressed, the report will be updated.

User Manual

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 Sales General	2	Sales Information (number of requests, number of products, subtotal, taxes, transportation costs, discounts and total) grouped by day.	 Update
---	---	--	--

Unchanged

For market reports that already are installed, it appear in the Actions column the "Delete" button which when pressed, the report will be deleted from your system.

by Day of Week	1	Sales Information (number of requests, number of products, subtotal, taxes, transportation costs, discounts and total) grouped by day of the week.	 Delete
----------------	---	--	--

Notifications

When we enter the market, if there are changes since the last time you enter, we will appear in orange the name of the groups to which the report belongs and on new report title image of "New" appears.

Sales			
Title	Version	Description	Action
by Hour	1	Sales Information (number of requests, number of products, subtotal, taxes, transportation costs, discounts and total) grouped by hour of the day.	 Delete
 by Zip Code	1	Sales Information (number of requests, number of products, subtotal, taxes, transportation costs, discounts and total) grouped by zip code.	 Install

3.2. Sql2report Viewer.

On this module, you can see and execute reports.

DashboardSalesCatalogCustomersPromotionsNewsletterCMSReportsSystem

Choose Report: Quotes listGo!

Select report

SQL

Message

No report loaded

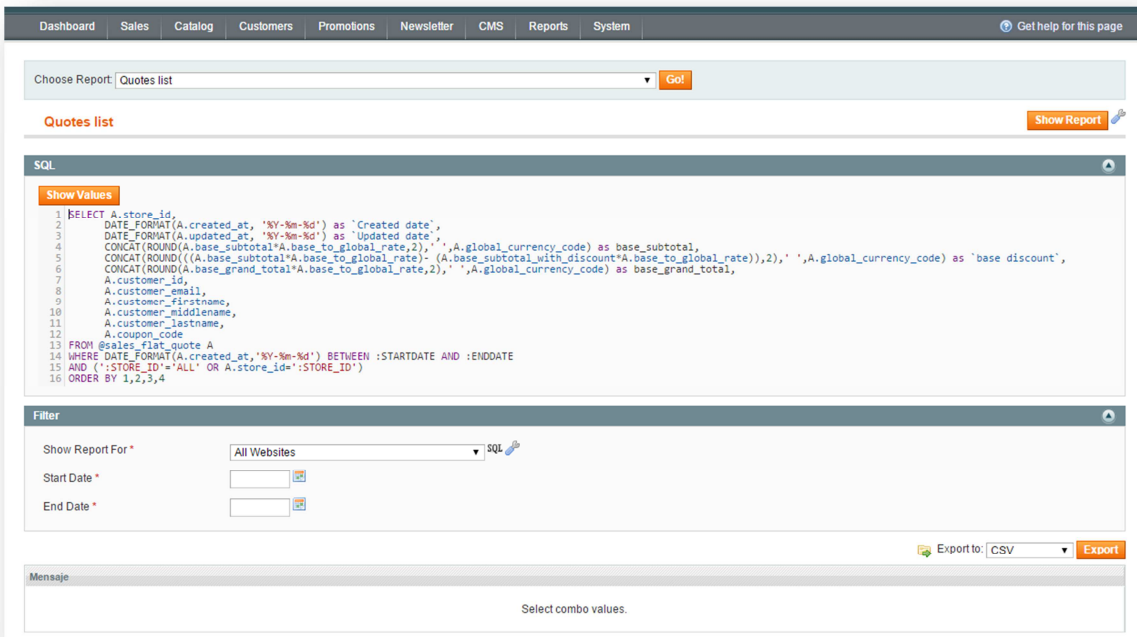
3.2.1. Load and execute a report.

Once you enter the module, a pull-down menu will show the reports list. To load a report, choose the report that you want to load and press the button "GO!"

Once the report is loaded, it will show two sections:

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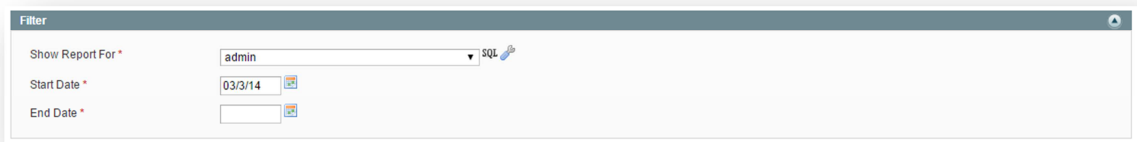


- SQL:** Here you can see the SQL of the report. Pressing the button “Show Values” you will see the SQL sentence with the replaced parameters if the report has been executed previously. If it is the first time the report is loaded, the parameters will be replaced for an empty value.



Once the values of the parameters are shown, pressing the button “Show Params” we will see the SQL sentence with the parameters.

- Filter:** Here you can give value the report parameters, all the parameters are compulsory



In the Select type filters, they will appear two buttons besides the selector.

- SQL:** Pressing this button, the sentence SQL of the filter will appear.

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User manual

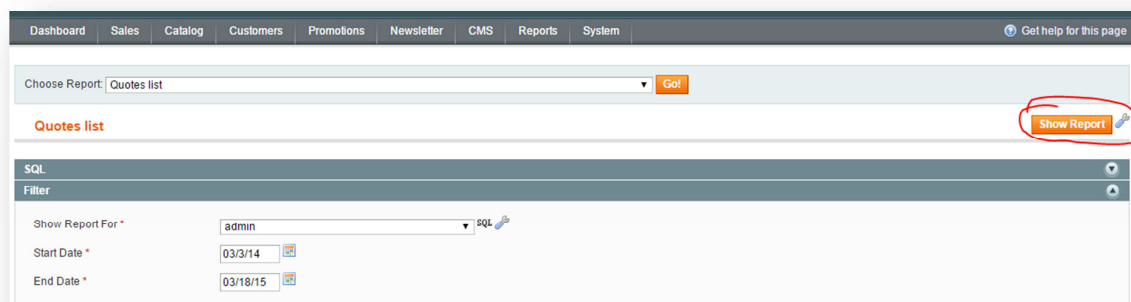
Document: Sql2report User Manual.docx

-  : Pressing this button, it will take you to the setup module so that you can edit this filter.

In the Date type filters, it will appear this button beside the text field:

-  : On pressing this button, it will appear a calendar so that you can choose one date.

Once the filter values are filled up to execute the report it is necessary to press the “Show Report” button.



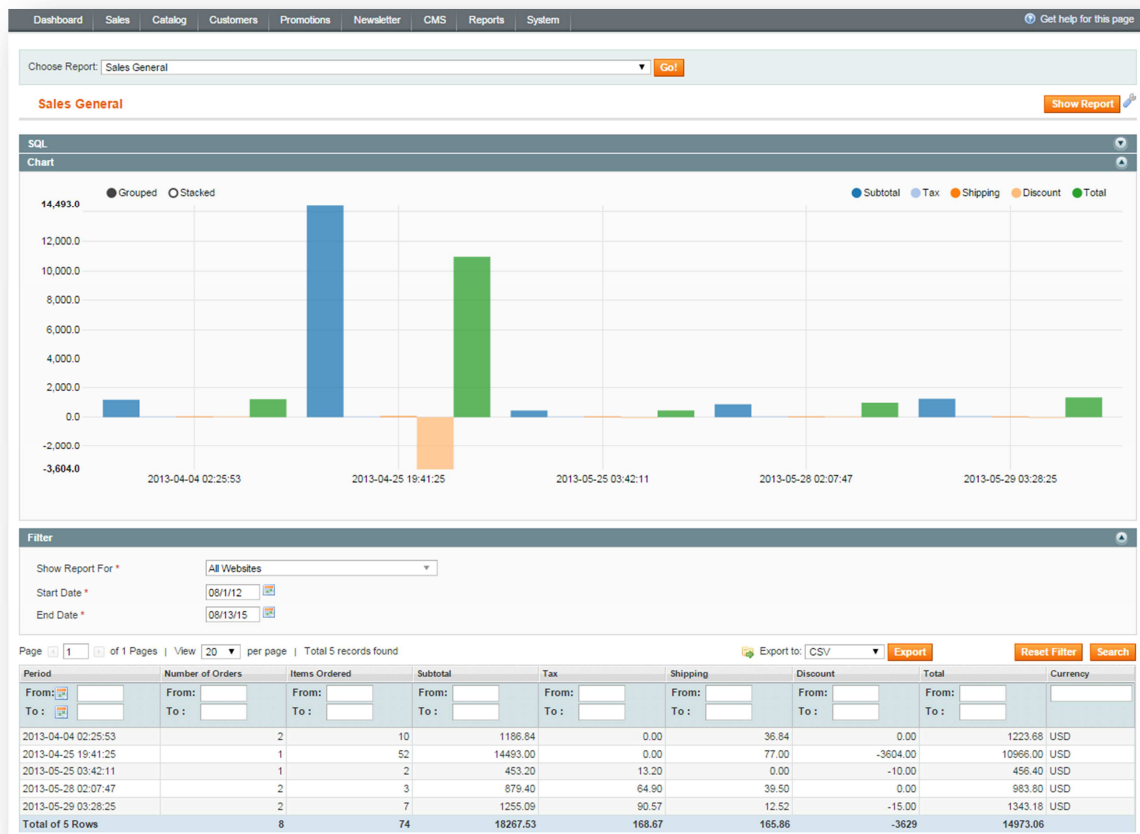
Besides the “Show Report” button, it appears the button , and if you press it, you will be taken to the setup module to edit the loaded report.

3.2.2. Report Display.

Once a report is loaded, it will show us the execution data.

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If the has assigned a chart, it will appear a new section called “Chart” with a chart drawing. Each type of chart is interactive; we could show and hide result without setting up the report again. The graph displays the data on the current page, to display the graph of all data, select “all” in the filter rows per page.

Down the “Filter” section we can see a square with the data. In the tables header it will show the names of the columns, being able to press on them to order them on that field, under the name, it will show boxes to filter data by that column. At the bottom of the table, it will appear a totals row, where we can see the total of the rows and if the values of the column are numbers, it will show the total of the values of the column.

We can export the data in two different formats:

- CSV: Plan files with values separated by character.
- Excel XML: Excel file.

To export the data, we will choose the exportation type and press the button “Export”.

We can navigate through the pages of results by clicking on the arrows, also can change the number of rows per page.

Page 1 of 3 Pages | View 20 per page | Total 55 records found

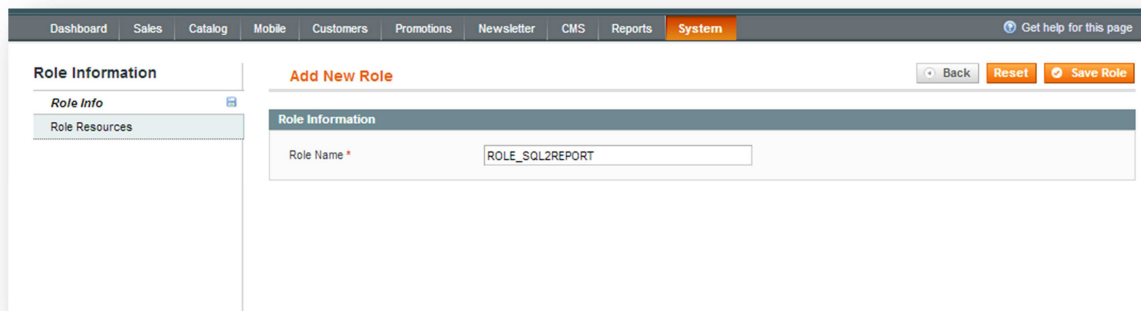
4. HOWTO

4.1. Configure a user with only permission to run reports.

Occasionally we need that certain users of our shop have only access to see one file and create reports without having access to Magento's private area. In this tutorial, I'm going to show you configure a user that only will have permissions inside the sql2report plugin.

Creation of the role.

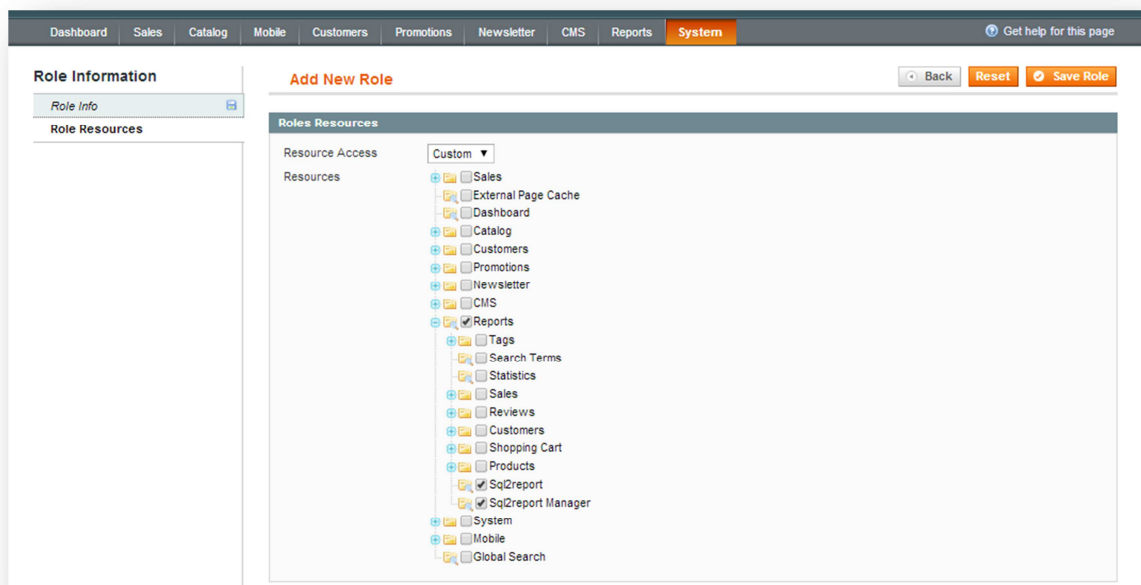
First thing we have to do is to create a role in Magento. For that we go to System ->Permissions->Roles and we press the button "Add New Role". On the page that is shown we put the name of the role `ROLE_SQL2REPORT`.



In the "Role Resources" section, we select only the sections

- Reports →Sql2report: to be able to see the reports.
- Reports →Sql2report Manager: to be able to setup reports.

Depending on the level of permissions that we want, we select one, the other or both.



Once the new role is configured, we create it clicking "Save Role".

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Creation of the user.

Now we have to create a user that can only see and set up report, for that we will go to System->Permissions->Users and we press the button "Add new User".

In the information section, we create a user with these parameters:

- User Name: sql2report
- First Name: User
- Last Name: Sql2report
- Email: sql2report@test.com
- Password: sql2report

New User	
Back Reset Save User	
User Information	Account Information
User Info	User Name * sql2report
User Role	First Name * User
REST Role	Last Name * Sql2report
	Email * sql2report@test.com
	Password * sql2report
	Password Confirmation * sql2report
	This account is Active

In the roles section, we assigned the role that was just created ROLE_SQL2REPORT.

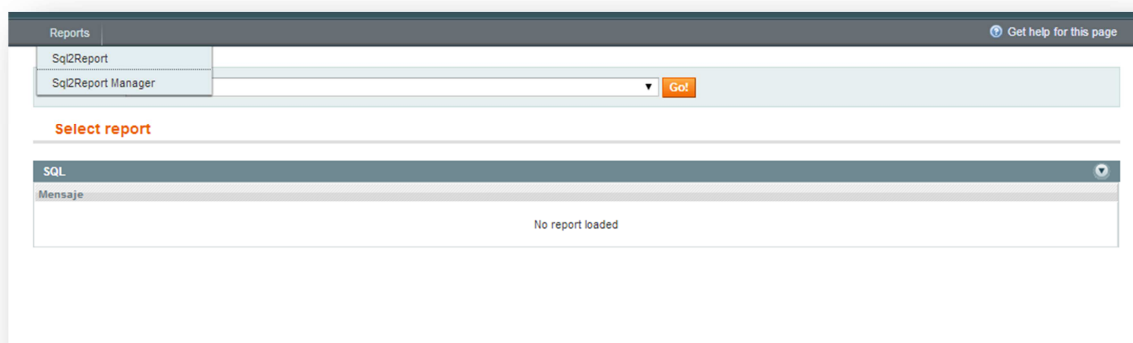
New User	
Back Reset Save User	
User Information	Account Information
User Info	User Name * sql2report
User Role	First Name * User
REST Role	Last Name * Sql2report
	Email * sql2report@test.com
	Password * sql2report
	Password Confirmation * sql2report
	This account is Active

Assigned	Role Name
Any	
☐	Administrators
☒	ROLE_SQL2REPORT

Once the new user is configured, we created it clicking "Save User".

Acceso con el nuevo usuario

If we Access now with the new user credentials, we will only have Access to the following sections on the menu, reports section and the sub-sections, Sql2report y Sql2report Manager.



4.2. Magento CRON active

If you are going to use the auto running reports, we must activate Magento cron, for it depending on the server where we installed Magento will be made one way or another.

The key to activate the Magento Cron idea is that the "cron.php" file in the root of Magento installation run every 5 minutes.

To do this we create a scheduled task, depending on the server, if a Linux create a task that runs this judgment:

```
/usr/bin/php -q /var/www/vhosts/domain.com/httpdocs/magento/cron.php
```

Obviously we will have to locate in our server the path where the file is.

If this error appears when you turn on cron in the system log

```
ERR (3): Warning: shell_exec() has been disabled for security reasons in  
/var/www/vhosts/domain.com/httpdocs/magento/cron.php on line 67
```

This is because the server hasn't enabled the shell_exec function, but there is a bug in the file cron.php file does not detect this, so it can activate the function or edit the cron.php file and add a line when disabled features are detected, for it if the original file has this part:

```
umask(0);  
  
$disabledFuncs = explode(',', ini_get('disable_functions'));  
  
$isShellDisabled = is_array($disabledFuncs) ? in_array('shell_exec',  
$disabledFuncs) : true;
```

Add the line in bold:

```
umask(0);  
  
$disabledFuncs = explode(',', ini_get('disable_functions'));  
  
$disabledFuncs = array_map('trim', $disabledFuncs );  
  
$isShellDisabled = is_array($disabledFuncs) ? in_array('shell_exec',  
$disabledFuncs) : true;
```

There is a plugin very useful and necessary to check the scheduled tasks and magento know what time they are to run, called AOE Scheduler, which you can find on this page:

<http://www.magentocommerce.com/magento-connect/aoe-scheduler.html>

4.3. Active cron of a report

When we want to run a report automatically, we follow these steps.

Config email and cron parameter by sql2report

In the section Cron when you are editing a report, you have to fill data Filter's Value if the report has filters, Email and File and active the tick "Active".

Manage Report: Customers & guest list

Back View Delete Duplicate Export Save

General information

Code * CUSTOMER_GUEST [STORE VIEW]
Title * Customers & guest list [STORE VIEW]
Group * Customers [STORE VIEW]

SQL

Filters

Chart

Links

Excel export format

Cron

☒ Active

When

0 10 * * * Reset

Minute Hour Day of Month Month Day of Week

Every Minute Every n minutes Each Selected Minute

Each selected minute

00	01	02	03	04	05	06	07	08	09
10	11	12	13	14	15	16	17	18	19
20	21	22	23	24	25	26	27	28	29
30	31	32	33	34	35	36	37	38	39
40	41	42	43	44	45	46	47	48	49
50	51	52	53	54	55	56	57	58	59

Filter's value

Show Report For* admin

Customer or guest* Customers & guest

Email

Subject * Test SQL2Report

To Email * info@domain.com

Attach file * Excel XML

Content * Test at 10:00

File generated

Path * /var/www/vhosts/serpini.es/httpdocs/magento/media

Save * ☐ No Save ☒ Save

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In the example we have set the "CUSTOMER_GUEST" report to run every day at 10 am, will generate an Excel report that will be sent to the e-mail info@domain.com. We have also indicated that the generated file is not deleted from the server.

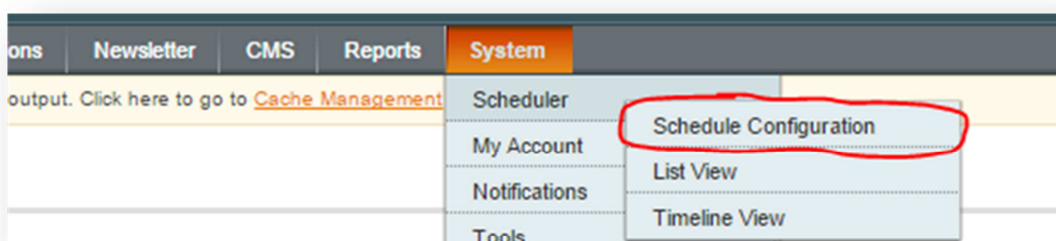
When we have completed all the data, the report and we will keep this message:

 Report saved Cron activated correctly

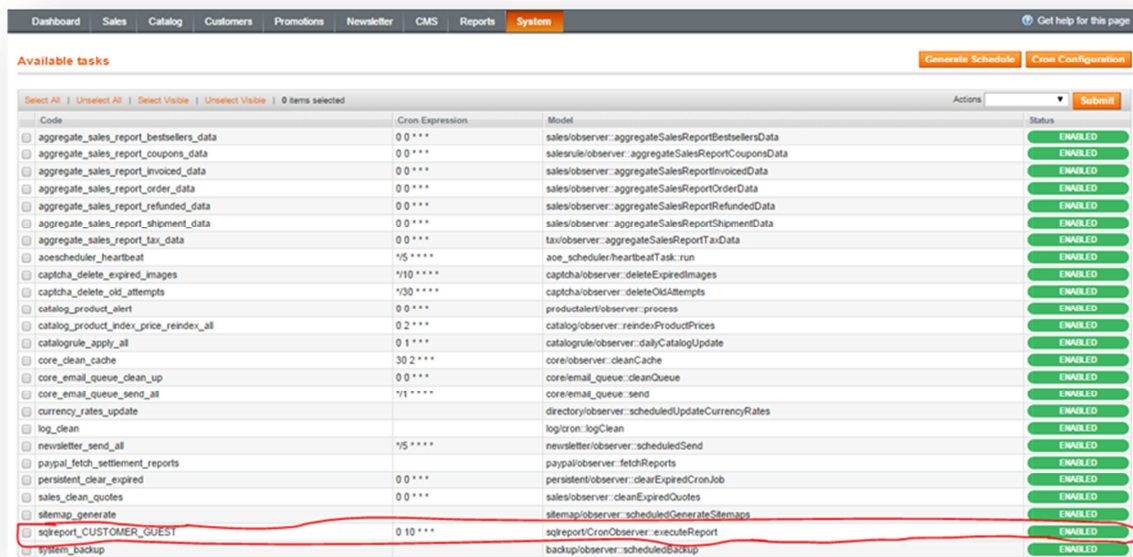
Enable Autorun in magento by AOE Scheduler

Thanks to AOE Scheduler plugin, we can see the execution and planning begins.

You have to go to System→Scheduler→Schedule Configuration



In the list, we see our report, in the example called "sqlreport_CUSTOMER_GUEST".

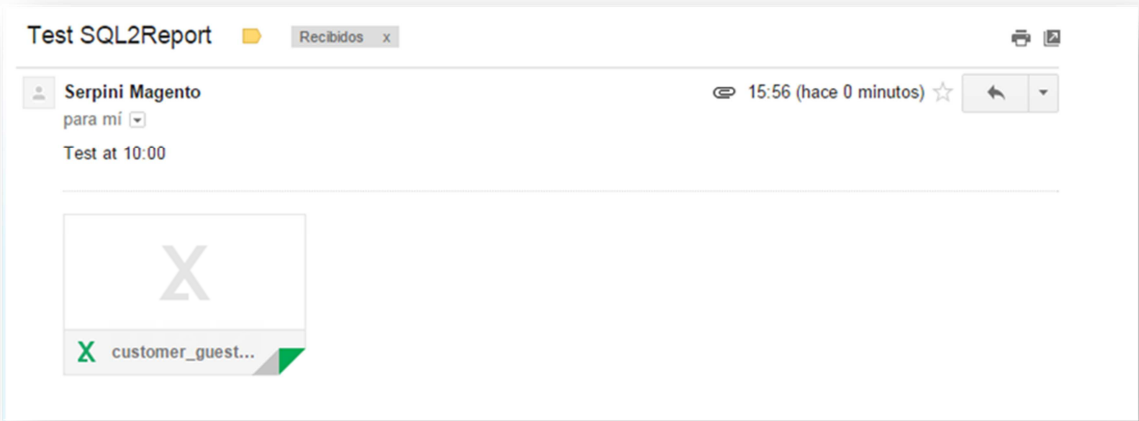


Code	Cron Expression	Model	Status
☐ aggregate_sales_report_bestellers_data	0 0 *	sales/observer: aggregateSalesReportBestsellersData	ENABLED
☐ aggregate_sales_report_coupons_data	0 0 *	salesrule/observer: aggregateSalesReportCouponsData	ENABLED
☐ aggregate_sales_report_invoiced_data	0 0 *	sales/observer: aggregateSalesReportInvoicedData	ENABLED
☐ aggregate_sales_report_order_data	0 0 *	sales/observer: aggregateSalesReportOrderData	ENABLED
☐ aggregate_sales_report_refunded_data	0 0 *	sales/observer: aggregateSalesReportRefundedData	ENABLED
☐ aggregate_sales_report_shipment_data	0 0 *	sales/observer: aggregateSalesReportShipmentData	ENABLED
☐ aggregate_sales_report_tax_data	0 0 *	tax/observer: aggregateSalesReportTaxData	ENABLED
☐ aoescheduler_heartbeat	* * * * *	aoe_scheduler/heartbeatTask: run	ENABLED
☐ captcha_delete_expired_images	* * * * *	captcha/observer: deleteExpiredImages	ENABLED
☐ captcha_delete_old_attempts	* * * * *	captcha/observer: deleteOldAttempts	ENABLED
☐ catalog_product_alert	0 0 *	productalert/observer: process	ENABLED
☐ catalog_product_index_price_reindex_all	0 2 *	catalog/observer: reindexProductPrices	ENABLED
☐ catalogrule_apply_all	0 1 *	catalogrule/observer: dailyCatalogUpdate	ENABLED
☐ core_clean_cache	30 2 *	core/observer: cleanCache	ENABLED
☐ core_email_queue_clean_up	0 0 *	core/email_queue: cleanQueue	ENABLED
☐ core_email_queue_send_all	* * * * *	core/email_queue: send	ENABLED
☐ currency_rates_update	* * * * *	directory/observer: scheduledUpdateCurrencyRates	ENABLED
☐ log_clean	* * * * *	log/cron: logClean	ENABLED
☐ newsletter_send_all	* * * * *	newsletter/observer: scheduledSend	ENABLED
☐ paypal_fetch_settlement_reports	* * * * *	paypal/observer: fetchReports	ENABLED
☐ persistent_clear_expired	0 0 *	persistent/observer: clearExpiredCronJob	ENABLED
☐ sales_clean_quotes	0 0 *	sales/observer: cleanExpiredQuotes	ENABLED
☐ sitemap_generate	* * * * *	sitemap/observer: scheduledGenerateSitemaps	ENABLED
☐ sqlreport_CUSTOMER_GUEST	0 10 *	sqlreport/CronObserver: executeReport	ENABLED
☐ system_backup	* * * * *	backup/observer: scheduledBackup	ENABLED

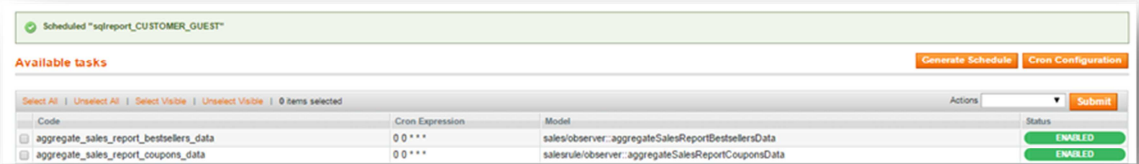
Select the task, select "Run now" on Actions and click Submit, the report will run and send a mail to the address you have configured, and check that the execution is correct.

User manual

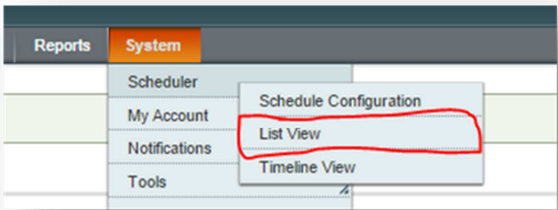
Document: Sql2report User Manual.docx



Now we schedule executions for it in the same window, we select our report, in the example "sqlreport_CUSTOMER_GUEST" in actions select "Schedule Now" and click on Submit, we see the following message



The autorun will be scheduled, you can see it going to System→Scheduler→List View



From the table, we select our task in the Code field and see two executions, one SUCCESS that is what we have executed to test PENDING works and other programming that is next run.

