Custom Reports via Supplier

The intent of this job aid is to highlight key steps required in creating Custom Reports from the N3M Workforce System. Custom Reporting provides users the ability to create ad-hoc reports and data extracts from predefined data/reporting sources within the application.

In order to login to the N3M Workforce System web-based application, see 'Login to the N3M Workforce System' job aid for instructions.

Custom Reports:

Custom Reports List Screen:

1 From the **Reports** tab select the Custom Reports sub-menu link. This will present a list of all custom reports.

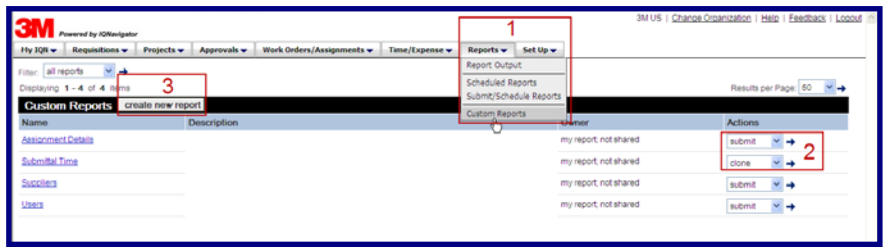
Custom Reports that have been created will be viewable in a hyperlink and the owner column will read, 'my report; not shared'. These reports are editable and can be deleted.

System reports that have been created by an administrator are also available. These reports cannot be edited and can only be submitted or cloned. The owner is 'system report' or 'org unit report'.

2 There are two actions that can be taken from the Actions column:

- Submit - Select **submit** to run a previously created or system generated report one time.
- Clone - Select **clone** to clone any report.

3 Select **create new report** to create a brand new report from scratch.



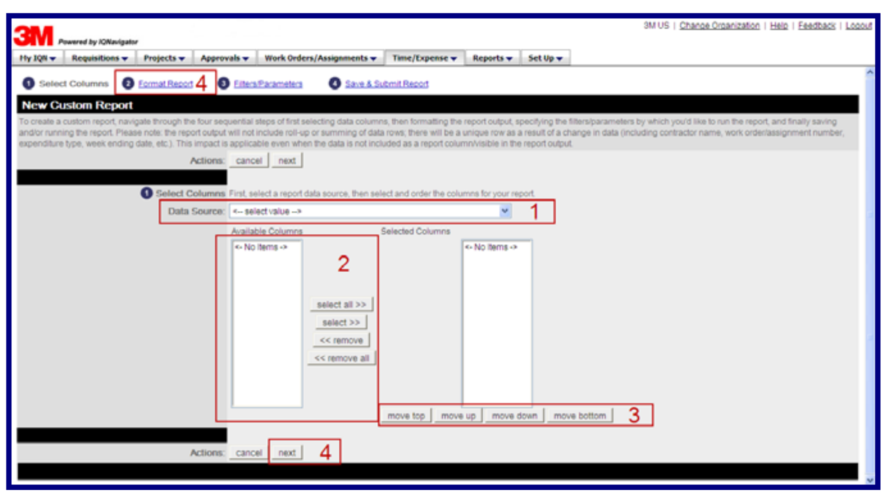
Create New Reports:

1 Select a data source for which to run the report. *(Note: a data source contains the information about an area within the N3M Workforce System from where data can be queried).*

2 Select the data columns to report on from within the 'Available Columns' box. Highlight the column name and click **select** to transfer the selected item to the **Selected Columns** box.

3 Highlight the data in the 'Selected Columns' to format the column ordering by selecting the **move up** and **move down** buttons.

4 Click the **next** button or click the Format Report hyperlink.



5 Rename the **Column Headings**, or leave them titled as they are.

6 Select a **Sort Priority** for the columns.

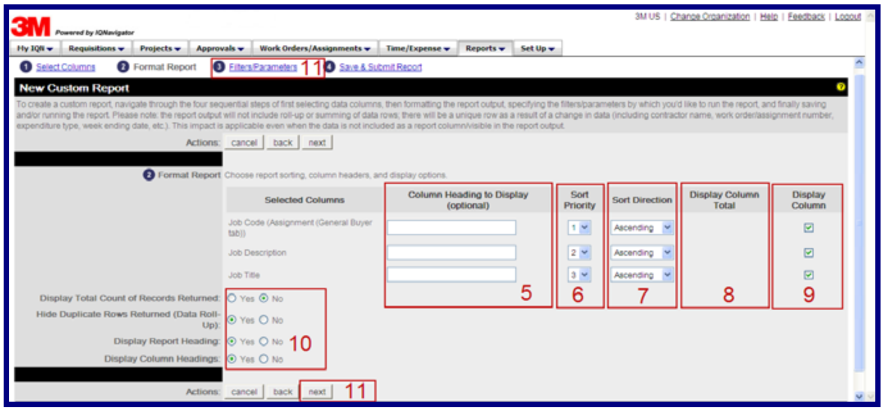
7 Specify a **Sort Direction** for columns (ascending or descending).

8 If applicable, select to **Display Column Total** *(Note: for total-able type column values only).*

9 In the **Display Columns**, click the checkboxes to display the selected columns.

10 Click the radio buttons to display a total count of records returned, enable data roll-up, display report headings and select display options.

11 Choose the **next** button or click the Filters/Parameters hyperlink.



12 First select a **Data Element**. This will act as a filter or parameter for the specific report.

(Note: A parameter allows the user to select specific data values each time the report is run. A filter is a stagnant data value for each time the report is run.)

13 Select an **Operator**. This is a value identifier for each filter or parameter selected.

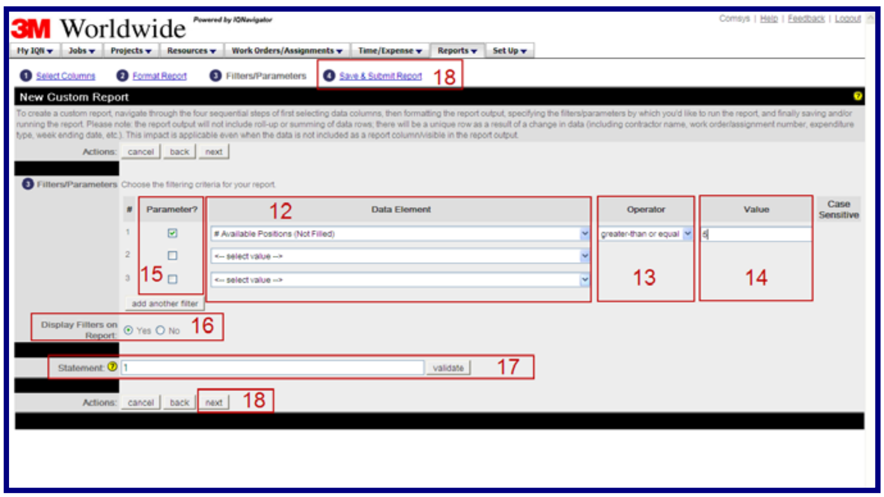
14 Once an operator is selected, enter a **Value** identifier for each filter or parameter selected.

15 After specifying the filtering criteria, designate whether the filtering criteria is a filter (leave as is) or a parameter by checking the **Parameter?** checkbox. Parameters may be changed on a report run by report run basis.

16 Choose whether or not to **Display Filters** on the report output.

17 The **Statement** field represents how the filters/parameters selected will be applied in determining the report output. The statement can be edited to change the resulting records selected. If 'and' is applied, both of the filters/parameters must be true. For more information on this section click the yellow question mark.

18 Click the **next** or the Save & Submit Report hyperlink.



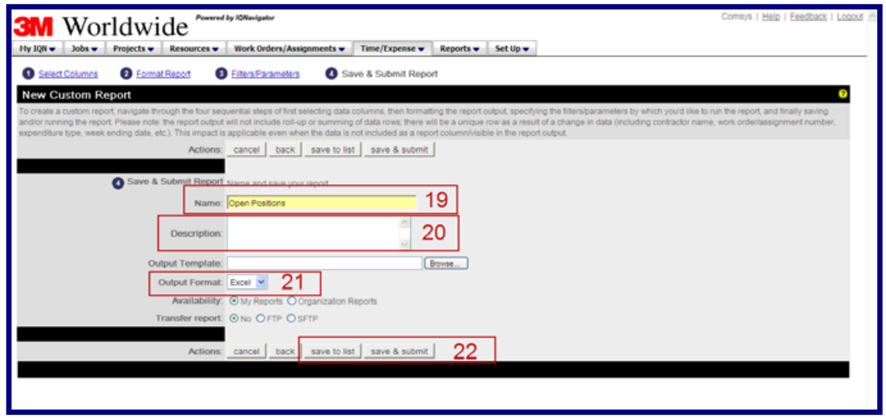
Custom Reports

19 Give the report a **Name**.

20 Provide a **Description** of the report.

21 Choose the **Output Format** or report format; Excel, XML, or HTML.

22 Save the report to the custom report list or **save and submit** report.



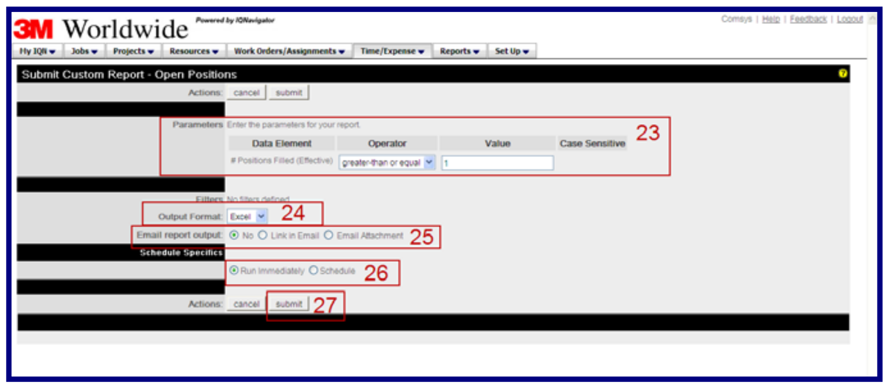
23 If the **save and submit report** has been clicked, the report filters and parameters will be presented. Change the parameters as necessary.

24 Choose the report **Output Format**.

25 Choose whether or not an email should be sent once the report is completed.

26 Schedule the report by selecting a start date, and specifying how often the report should run.

27 Click the **submit** button to run the report.



28 Select the Report Output sub-menu link from the **Reports** tab to find all submitted and completed reports.

29 To refresh this page, click the **refresh** button, or click in the checkbox to enable the auto refresh option.

30 Once the report is completed the report id will change from a black number to a hyperlink in the Report ID column. Click on the hyperlink to download and access the report.

31 To **delete** or **resubmit** a report, select the appropriate action in the Actions column and click on the **blue go arrow** button.