Oracle® Retail Brand Compliance Management Cloud Service

Reports User Guide

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Oracle Retail Brand Compliance Management Cloud Service Reports User Guide, Release 15.0

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Oracle Retail Brand Compliance Management Cloud Service Reports User Guide, Release 15.0

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Preface

This document describes the Oracle Retail Brand Compliance Management (ORBCM) Cloud Service Reports user interface. It provides an overview of the key features provided by the reporting facility.

Audience

This document is intended for the users of the Oracle Retail Brand Compliance Management Cloud Service Reports module.

Documentation Accessibility

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Related Documents

For more information, see the following documents in the Oracle Retail Brand Compliance Management Cloud Service Release 15.0 documentation set:

- *Oracle Retail Brand Compliance Management Cloud Service Administration Guide*
- *Oracle Retail Brand Compliance Management Cloud Service Implementation Guide*
- *Oracle Retail Brand Compliance Management Cloud Service Release Notes*
- *Oracle Retail Brand Compliance Management Cloud Service User Guide*

For information on the Oracle Retail Brand Compliance Management Cloud Service modules, see the following documents:

- *Oracle Retail Brand Compliance Management Cloud Service Product User Guide*
- *Oracle Retail Brand Compliance Management Cloud Service Project User Guide*
- *Oracle Retail Brand Compliance Management Cloud Service Supplier User Guide*

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To more quickly address critical corrections to Oracle Retail documentation content, Oracle Retail documentation may be republished whenever a critical correction is needed. For critical corrections, the republication of an Oracle Retail document may at times **not** be attached to a numbered software release; instead, the Oracle Retail document will simply be replaced on the Oracle Technology Network Web site, or, in the case of Data Models, to the applicable My Oracle Support Documentation container where they reside.

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`http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html`

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of an document with part number E123456-01.

If a more recent version of the document is available, that version supersedes all previous versions.

Oracle Retail Documentation on the Oracle Technology Network

Oracle Retail product documentation is available on the following web site:

`http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html`

(Data Model documents are not available through Oracle Technology Network. You can obtain these documents through My Oracle Support.)

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1 Introduction

Reports is a reporting facility which offers a user-friendly and powerful interface for reporting on data within the system. This document provides an understanding of the concepts and functionality of Reports for users, in order to act as a quick reference guide to start using Reports to create their own reports. It is not intended to be used as a comprehensive guide.

Accessing Reports

After logging in to the system, users see an option to access Reports from the main navigation bar at the top of the screen.

To access Reports, select the option. The Getting Started page appears. For more information, see Chapter 2.

Upgrading to Brand Compliance 15.0

In the Oracle Retail Brand Compliance Management Cloud Service 15.0 release, the TIBCO Jaspersoft reporting tool is upgraded to version 6.1. When upgrading an existing Brand Compliance system to release 15.0, note the following:

Field Labels in Reports

The reporting release comes with core system text. If the client has at any point changed their system text labels and these are to be replicated in reporting, then they need to be uploaded manually.

Existing Reports

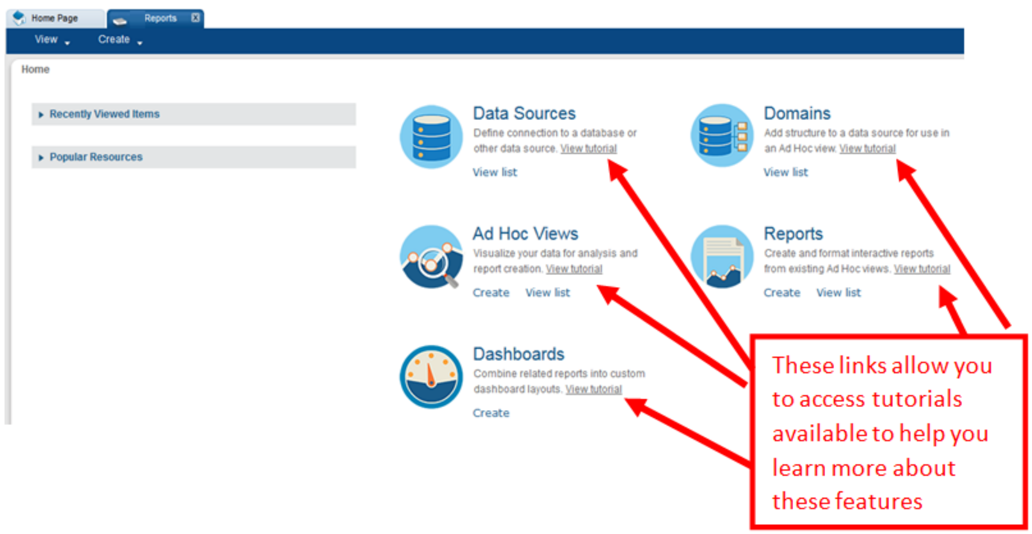
For existing reports, the first time they are run on the new Jaspersoft 6.1 environment, Jaspersoft will attempt to upgrade them. Oracle advises that time be planned for this to be done on the UAT environment, as not all reports may upgrade properly and may therefore have to be rewritten. Note that Oracle Development will not be rewriting any reports.

2

Getting Started

After selecting the Reports option, the initial page opens.

Figure 2–1 Getting Started Page

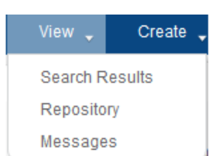


From here you can either run a report you have created, run a report someone else has created, or create a new report (subject to permissions).

View Menu

The View menu, in the top left of the page, is present on all pages within Reports. It allows you to navigate around the module more easily.

Figure 2–2 View Menu



The following options are available in the menu:

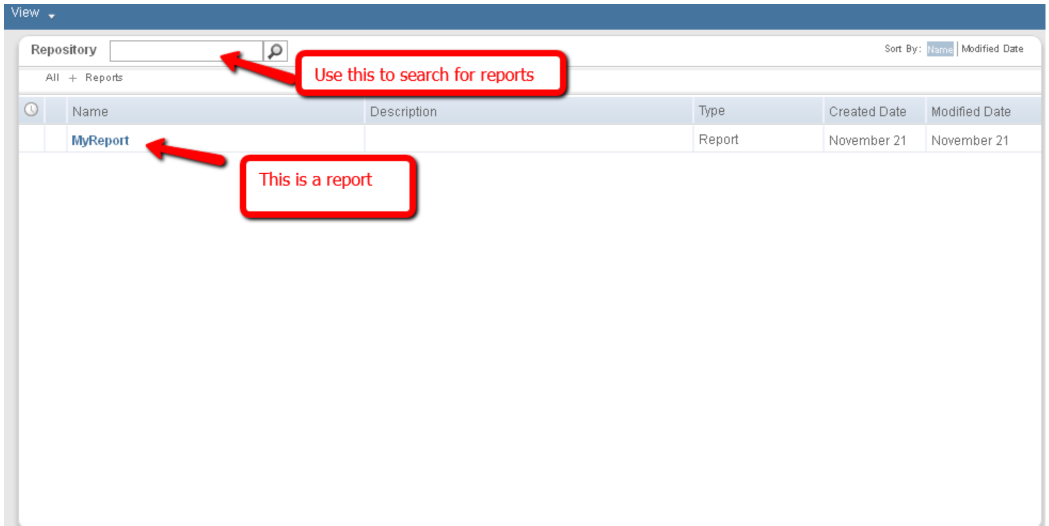
- Search Results
- Repository

- Messages

Search Results

This option displays the repository of resources filtered by criteria selected in the Filters panel.

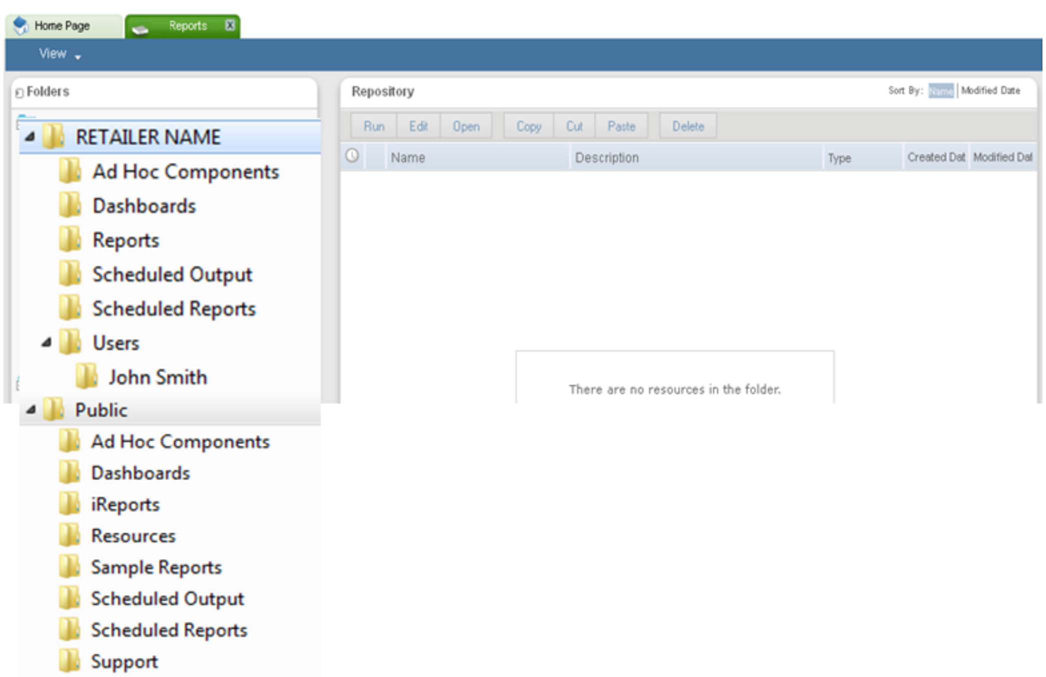
Figure 2–3 Search Results Page



Repository

This option displays a number of folders.

Figure 2–4 Repository Page



There are two folders available. Table 2–1 lists the contents of the Retailer folder. Table 2–2 lists the contents of the Public folder.

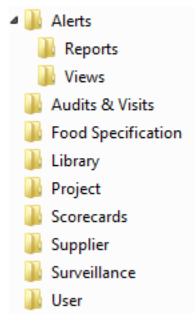
Table 2–1 Retailer Folder

Folder Name	Description	Created by
RETAILER FOLDER	This is set to the name of the organization, for example, Global Foods Ltd.	Jasperserver default/ Oracle
Ad Hoc Components	Adhoc components which can be used to create things such as views.	Jasperserver default
Dashboards	A folder that can be used by users to save their Dashboards which are then visible to all users.	Oracle
Scheduled Output	A folder that can be used to store the output from any scheduled reports.	Oracle
Scheduled Reports	Provides a view of scheduled reports.	Oracle
Users *	Unless you are an Oracle Authorized Administrator, you only see your own folder here. You are able to save your Views and Reports within your folder.	Oracle

Table 2–2 Public Folder

Folder Name	Description	Created by
PUBLIC	All the folders within this area are Read Only to all users. The only user that can add items to these folders is a Jasperserver Administrator.	Jasperserver default
Ad Hoc Components	Adhoc components which can be used to create things such as views.	Jasperserver default
Dashboards	Oracle-provided Dashboards are deployed here.	Oracle
iReports	Oracle-provided iReports are deployed here.	Oracle
Reports Domains	ORBCM Cloud Service reporting Domains.	Oracle
Resources	General folder containing various resources provided by Oracle.	Oracle
qReport Views	ORBCM Cloud Service reporting views.	Oracle

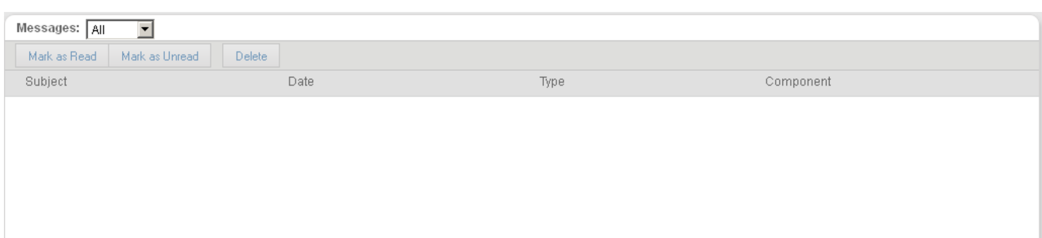
Table 2–2 (Cont.) Public Folder

Folder Name	Description	Created by
Sample Reports	This contains a set of sample reports which have been provided as a starting point. The folder is split across the different areas of the system, for example, Alerts, Supplier, and Product. Example structure:  Note how reports are kept in one folder and the views in another.	Oracle
Scheduled Output	Oracle folder for storing reports generated by the scheduler.	Oracle
Scheduled Reports	Oracle Development Scheduled Reports.	Oracle
Support	Oracle area for resources used by the ORBCM Cloud Service Support Team.	Oracle

Messages

This option lists system messages, for example, an error in a scheduled report.

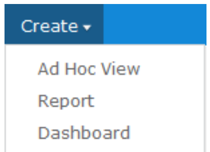
Figure 2–5 Messages Page



Create Menu

The Create menu is present on all screens within Reports (subject to permissions) and allows you to create a number of things.

Figure 2–6 Create Menu



The following options are available in the menu:

- Ad Hoc View
- Report
- Dashboard

Ad Hoc View

> **Note:** Only Advanced Reporting Administrators are able to see the Ad Hoc View option.

Selecting the Ad Hoc View option from the Create menu allows the user to create a new view based upon a particular Domain. For more information, see Chapter 3.

Report

Selecting the Report option from the Create menu allows the user to create a new report based upon an Ad Hoc View. For more information, see Chapter 4.

Dashboard

Selecting the Dashboard option from the Create menu allows the user to create a new Dashboard. For more information, see Chapter 7.

Brand Compliance Management Cloud Service User Interface

Before using Reports, be sure that you are familiar with the user interface. If you need more information, see the *Oracle Retail Brand Compliance Management Cloud Service User Guide*. This User Guide covers the login, home page, and user interface.

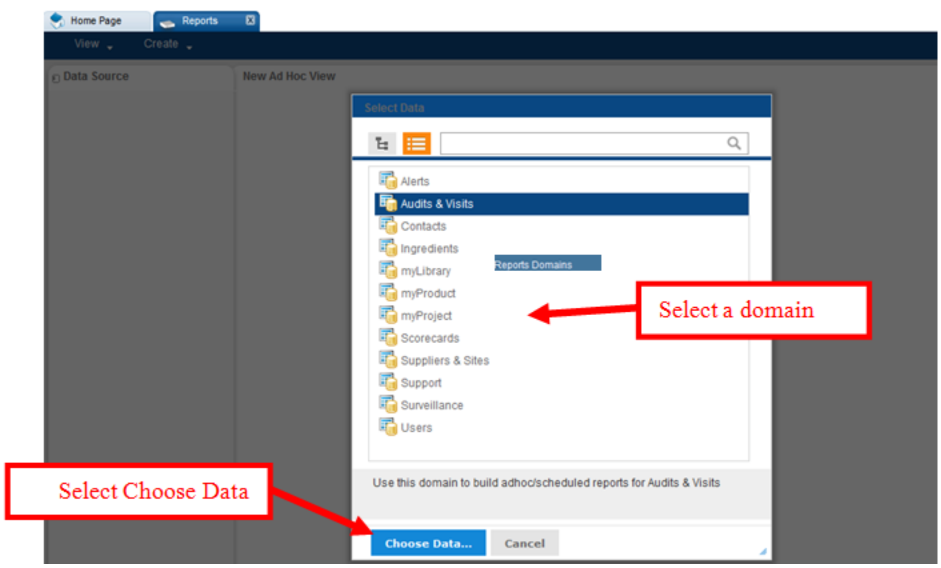
3

Creating a New Ad Hoc View

To create an ad hoc report, select the Ad Hoc Report option from the View menu. The Data Chooser: Source dialog opens.

Choosing the Domain

Figure 3–1 Data Chooser: Source Dialog Box



Select the domain you want to report on and select **Choose Data**. The Data Chooser page opens.

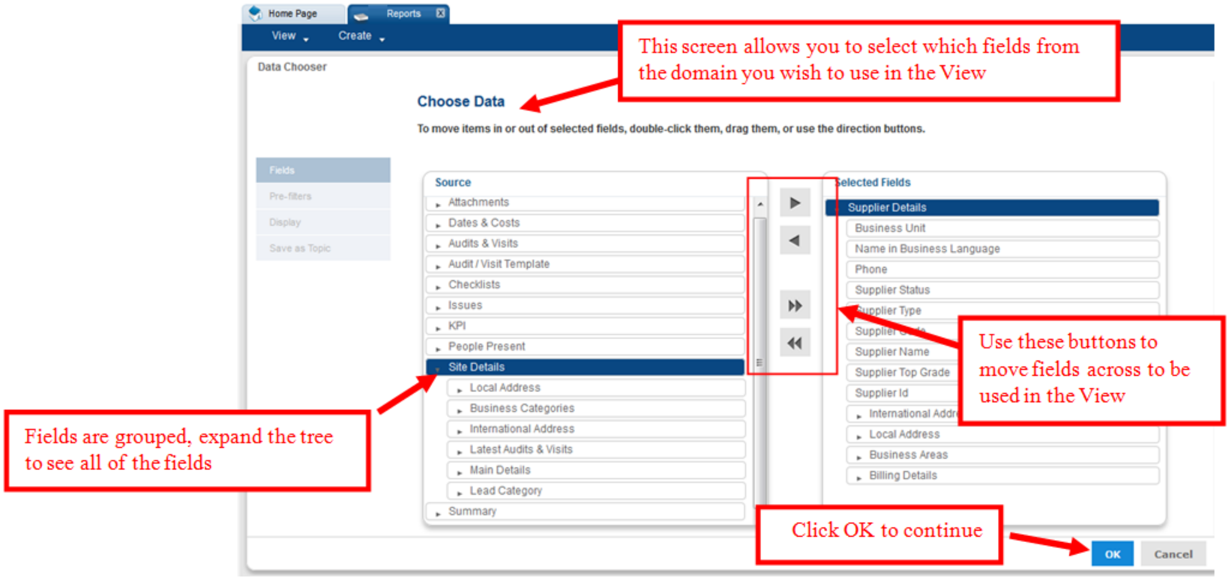
Note: You can only choose one domain. Views can only be run across one domain.

Views that run across multiple domains need to be created as an iReport, using the iReport Designer. For more information, see **iReport Designer** in the glossary.

Choosing Fields for your View

This page allows you to select which fields from the domain you want to use in your report.

Figure 3–2 Select Fields



To choose fields for your view:

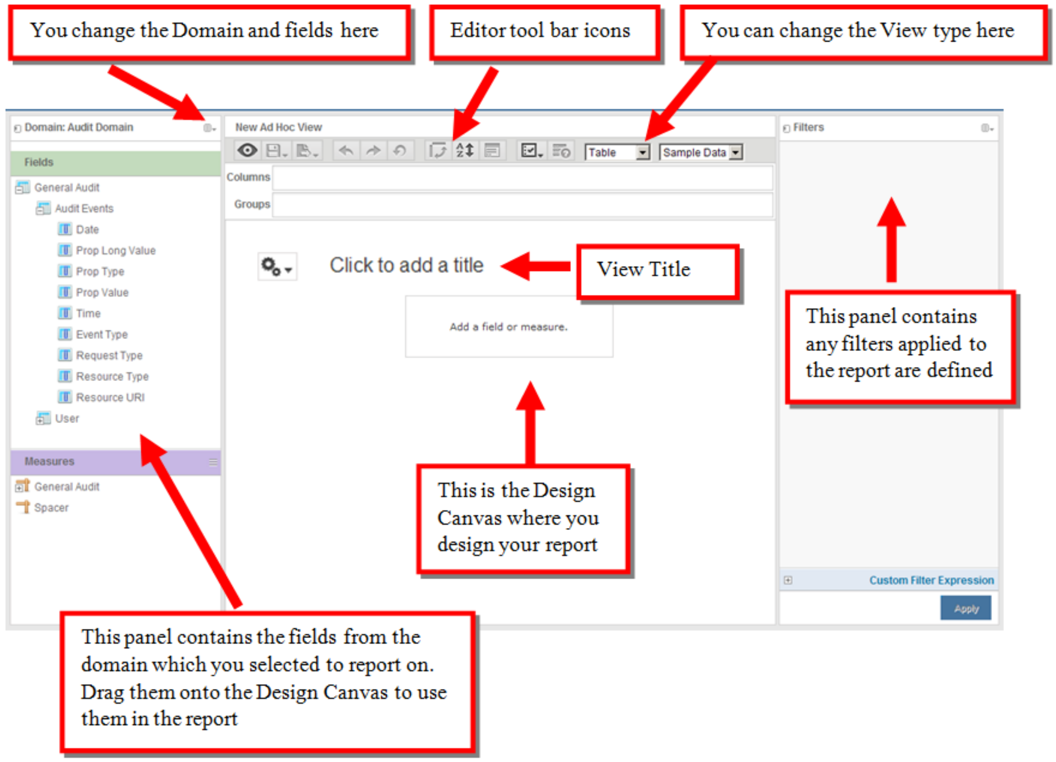
1. The fields are grouped. To see all of the fields, expand the tree in the Source pane.
2. To select fields or groups of fields, move the fields from the Source pane to the Selected Fields pane.

   You can double click, drag, or use the direction buttons. You can also move the items in the opposite direction using these methods. The selected domains and fields can be changed later, if required.
3. To continue, click **OK**.

Designing Your Report

Once you have selected your fields and report type, the Report Designer opens.

Figure 3–3 Report Designer



For more information, see the following sections:

- Editor Tool Bar
- Chart Types
- Column Controls
- Field Controls
- Chart Options
- Cross Tab Report Options
- Filters
- Copying Views and Reports

Editor Tool Bar

Table 3–1 describes the icons available in the editor tool bar.

Table 3–1 Editor Tool Bar Icons

Icon	Name	Description
	Toggle between designer and display mode	Click this icon to hide the editor interface and view only the report. This mode provides a subset of the editor's full feature set. For example, you can change summaries and datatypes for all report types, change the chart type, legends, and display options in charts, and define sorting and the order and size of columns for tables. If the report includes filters created in the editor, those filters can be changed or removed.

Table 3–1 (Cont.) Editor Tool Bar Icons

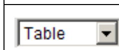
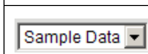
Icon	Name	Description
	Save the ad hoc view	Place the cursor over this icon to open a menu of save options: ■ Save Ad Hoc View ■ Save Ad Hoc View As ■ Save Ad Hoc View and Create Report
	Export	Click this icon to export the report.
	Undo	Click this icon to undo the most recent action. For example, if you added a field to a table, clicking this icon removes the field from the canvas.
	Redo	Click this icon to redo the most recently undone action. Redo is only available immediately after you click the Undo icon; any other action disables the Redo icon.
	Reset the report to its last saved state	Click this icon to revert the report to its state when you last saved. After you click Undo All, you can click the redo icon to recreate the steps you took before clicking Undo All.
	Switch the groups	Click this icon to change the way groups are displayed. Depending on the tab you are viewing, the behavior differs: ■ Crosstab: pivots the column groups with the row groups. ■ Table: displays the alternate grouping. ■ Chart: displays the alternate grouping.
	Set the sort order	When working with tables, click this icon to view the current sorting and select fields for sorting data.
	Change the input values	Click this icon to view the input controls applied to this report. In some cases, you can select new values to change the data. For example, you might change a date range displayed in the report. This icon is available only when input controls are defined for a JRXML-based topic.
	Set properties for the ad hoc view	Allows a user to either Toggle the Title Bar or Hide the Layout Band.
	View SQL query	Allows a user to see the SQL query.
	Chart type	You can change the report type here, for example, Table, Chart or Crosstab. For details of each chart type, see "Chart Types.".
	Amount of data	Allows a user to switch from Sample Data to Full Data.

Chart Types

There are three view types available:

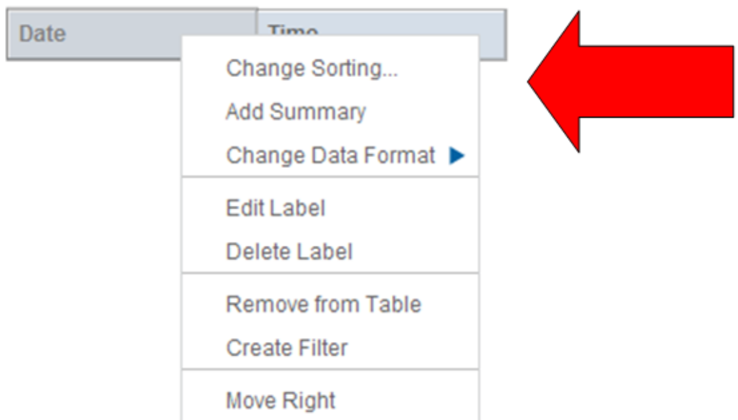
- Table - Use this to view values in the database and summarize the values in columns. Each row corresponds to a row in the database. Rows can be grouped by identical values in any field with intermediate summaries for each grouped value. For example, a table report of Product Records might contain columns to show the Name and Date Created, and its rows might be grouped by Supplier and Site.

- Chart - Use this to compare one or more measures across multiple sets of related fields. Charts summarize the data graphically. Types of charts include bar chart, line chart, and pie chart. With the exception of time series and scatter charts, each type of chart compares summarized values for a group. For example, the Chart tab might show the data in a bar chart that compares the number of products by Brand Manager.
- Crosstab - Use this to summarize data across multiple dimensions. Columns and rows specify the dimensions for grouping; cells contain the summarized measurements. Crosstabs data groups can be expanded or contracted by clicking them.

Column Controls

Right click on a column or heading for the following options:

Figure 3–4 Column Controls



Field Controls

Right click on a Field in the Data Chooser for the following options:

Figure 3–5 Field Controls Menu

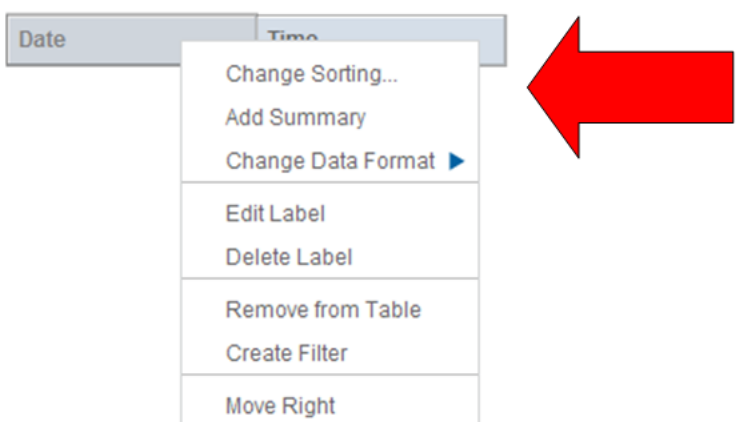
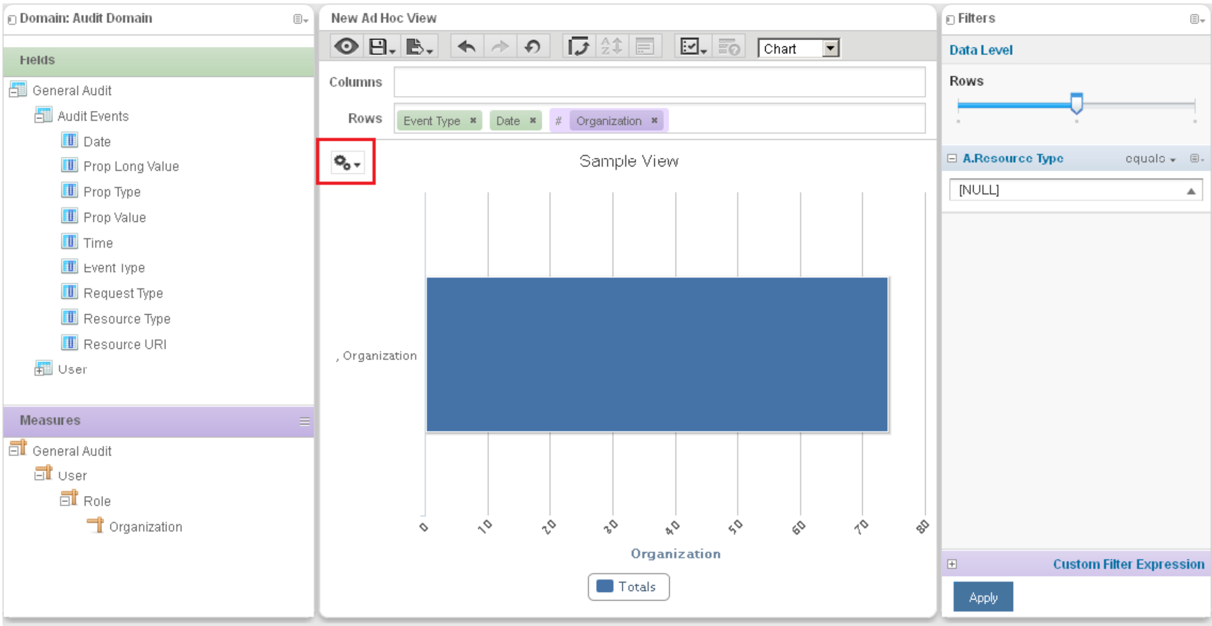


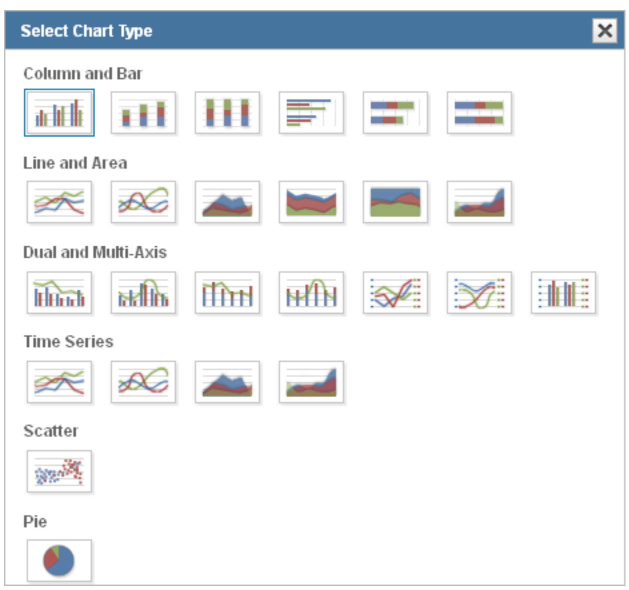
Chart Options

Figure 3–6 Chart Options Menu



To change the chart type click the chart type icon . In Figure 3–6, the location is shown in the red box. Figure 3–7 shows the available chart types.

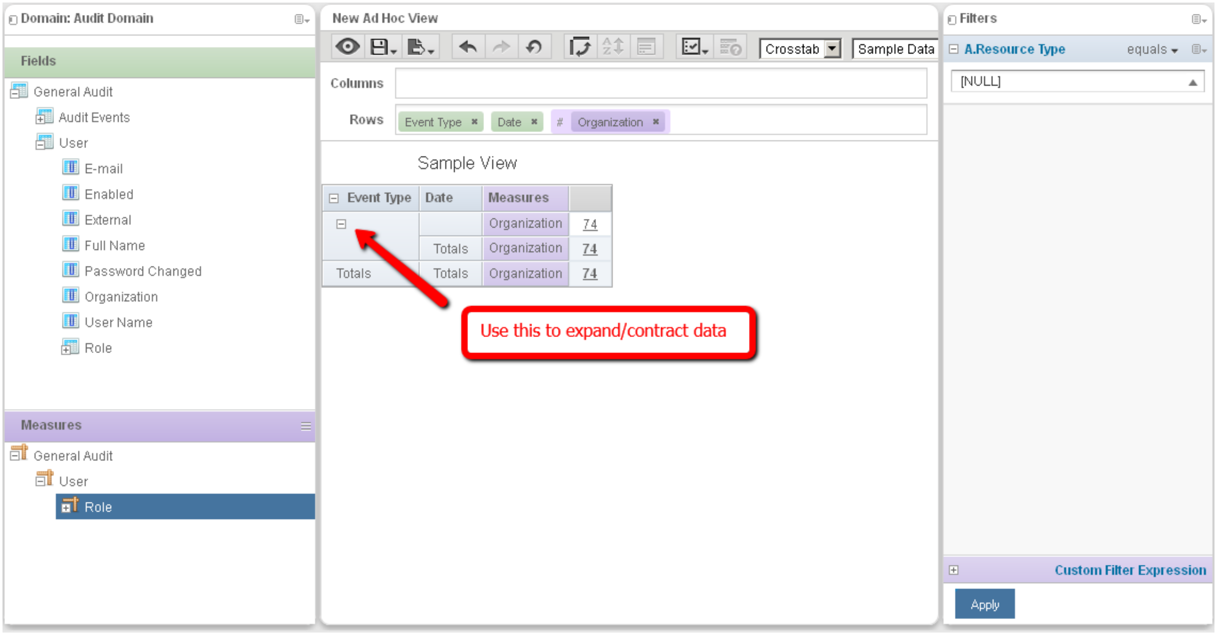
Figure 3–7 Select Chart Type



Cross Tab Report Options

Crosstab reports allow to you group data and drill down into the data.

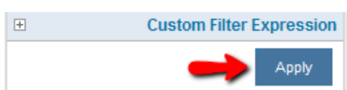
Figure 3–8 Cross Tab Report Options



Filters

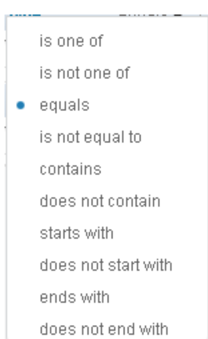
When changing filters, the system does not automatically update the report results. All filters can be changed as required before clicking the APPLY button, which changes the report results based upon the new filters.

Figure 3–9 Filter Toggle Operation



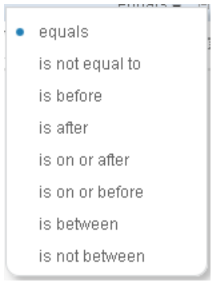
For non-date fields, the following options are available:

Figure 3–10 Filter Non-Date Fields Menu



For date fields, the following options are available:

Figure 3–11 Filter Date Fields Menu

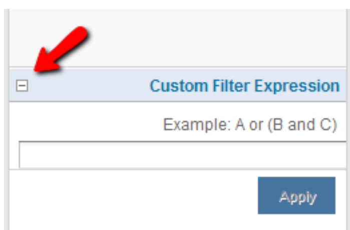


Advanced Filters

When you create multiple filters, by default they are connected with an implicit AND operator; that is, the data displayed in your report is what remains after all your filters are applied. However, with the advanced filter functionality, you can exercise greater control over the displayed data by applying an advanced expression that includes more complex, nested AND, OR, and NOT operators, as well as by applying multiple filters to a single field.

To do this, select the option in the Filters panel shown in Figure 3–12.

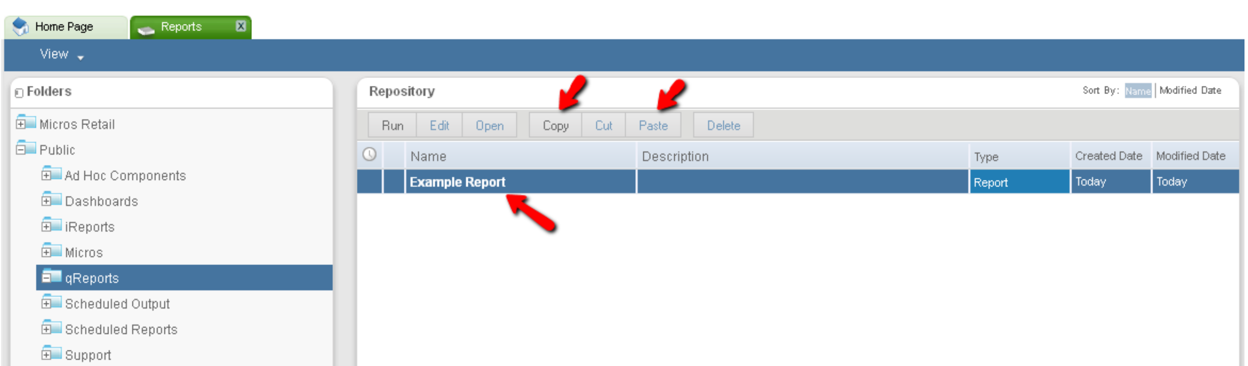
Figure 3–12 Advanced Filter Options



Copying Views and Reports

You may wish to use a pre-configured standard report in the Public folders as a basis for a new report. Permissions dictate that you are unable to edit any report in the Public folders. Therefore, to do this you can use the Copy function to copy the report into your folder.

Figure 3–13 Copy Report



To copy a report:

1. Select Repository from the View menu.

2. Use the Folders panel on the left-hand side to browse the folder structure.
3. Highlight the report you wish to copy in the right-hand panel, and then select **Copy** from the top menu to copy it (or by right clicking).
4. Navigate to the folder you want to copy it to using the Folders panel. Then select **Paste** to paste the report into that folder. You are then able to edit the report in the Report Designer to create your new report.

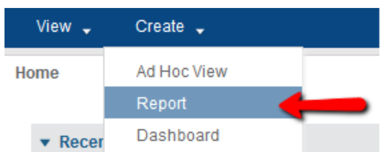
4

Creating a Report

Once a view has been created, you can create a report in one of three ways:

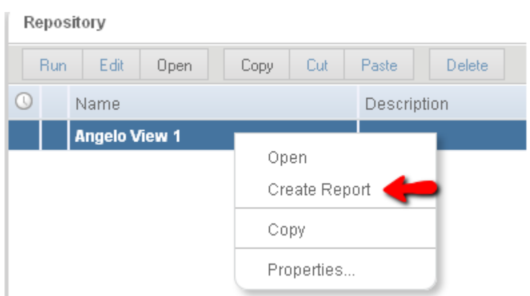
- You can select Report in the Create menu.

Figure 4–1 Create Report from the Create Menu



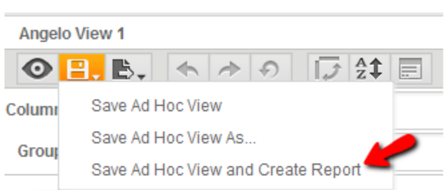
- You can select the view, right click, and then select the Create Report option.

Figure 4–2 Create Report by Right-Click on the View



- When you have the view open, you can select an option to create a report.

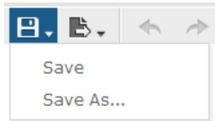
Figure 4–3 Create Report by Selecting the Report Option in the View



Saving a Report

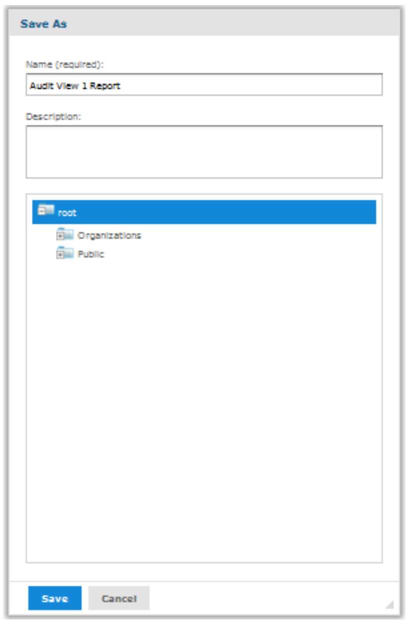
When you want to save your report, select the Save icon. There are two standard options, Save and Save As.

Figure 4–4 Save Options



If the report has never been saved before, selecting either option displays the Save As dialog box.

Figure 4–5 Save As Dialog Box



Here you can specify the report name and folder where you want to save the report. Once you have selected the folder where you wish to save the report in, select **Save**. You are able to save reports in folders to which you have the permissions to do so. If you do not have permissions to save the report in the selected folder, you are not able to click the Save button.

5

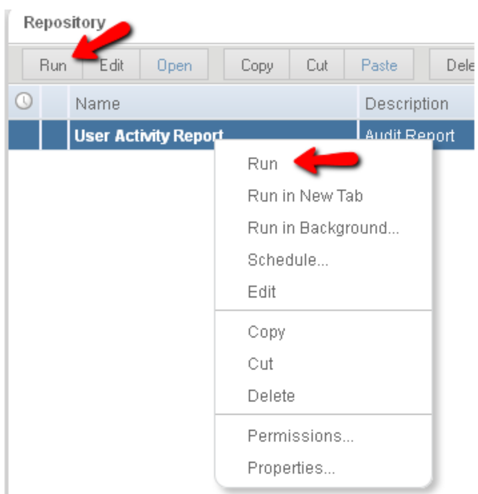
Running and Exporting Reports

This chapter provides information on running and exporting your reports.

Running a Report

Once you have selected the report, you can either right click and select Run or select Run from the menu at the top of the right-hand panel.

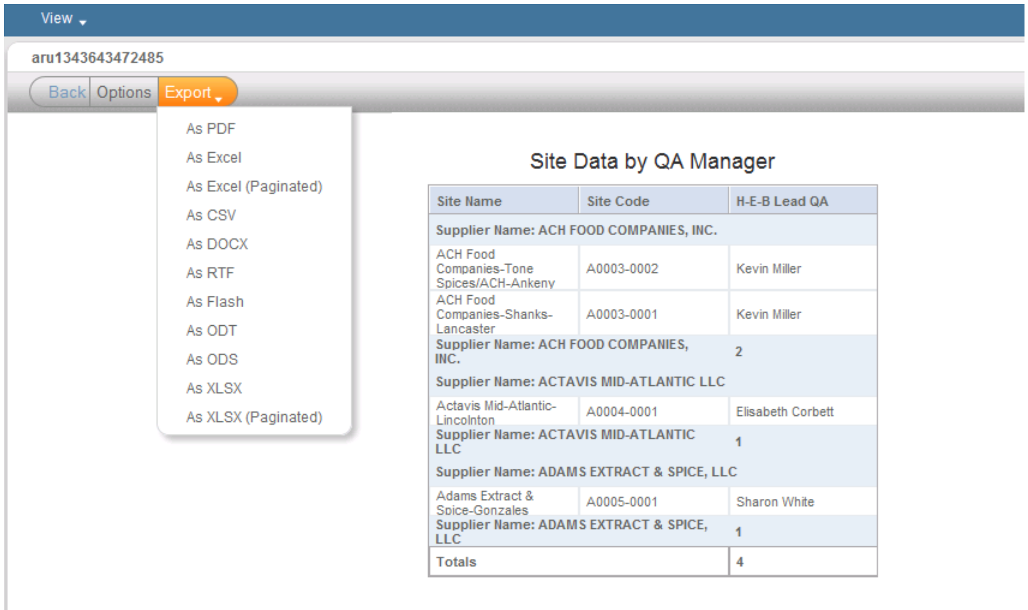
Figure 5–1 Running a Report



Exporting a Report

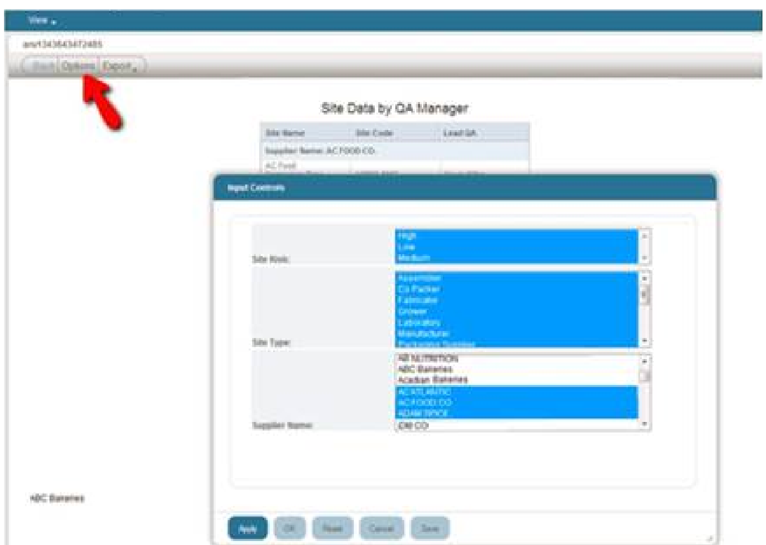
Having run the report, you can export it to several different formats. Figure 5–2 shows the export options, for example, PDF, Excel, and CSV.

Figure 5–2 Export a Report Menu



You can also choose to alter the filters you set up, without having to return to the Report Designer. To alter the filters, select Options.

Figure 5–3 Input Controls



6

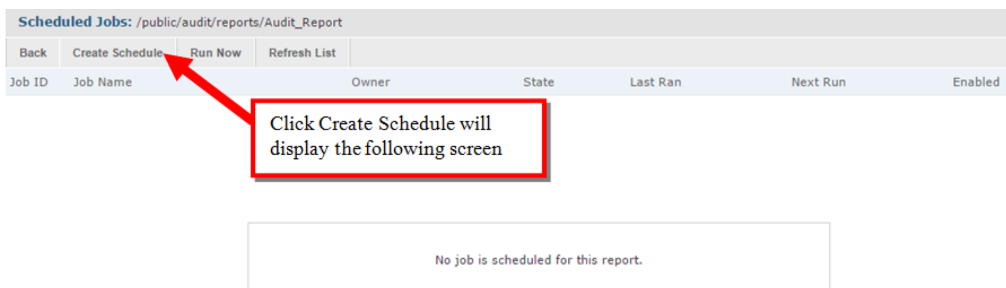
Scheduling Reports

Reports has a powerful report scheduling function. The scheduling wizard allows you to set up a job, the report parameters, and output options.

To schedule a report:

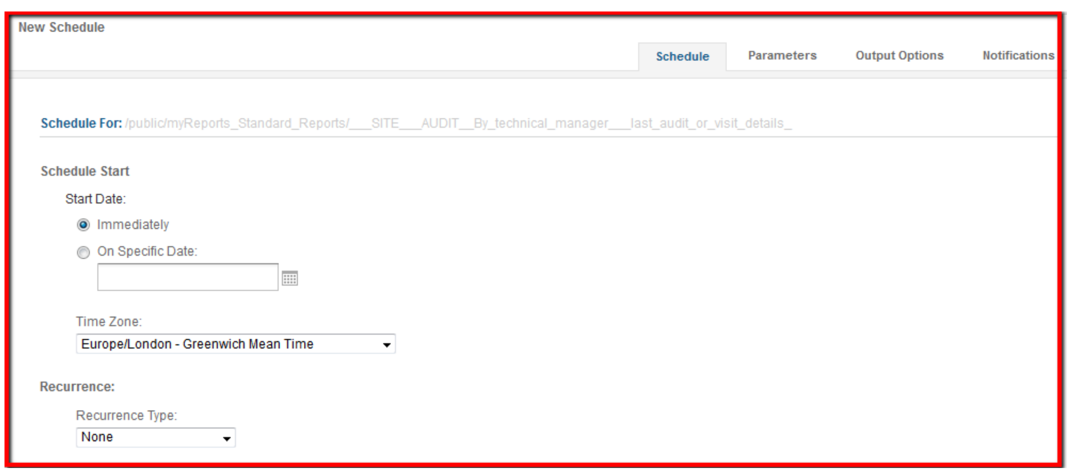
1. To access the scheduling wizard, right click on a report and select Schedule. The Scheduled Jobs page opens.

Figure 6–1 Scheduled Jobs Page



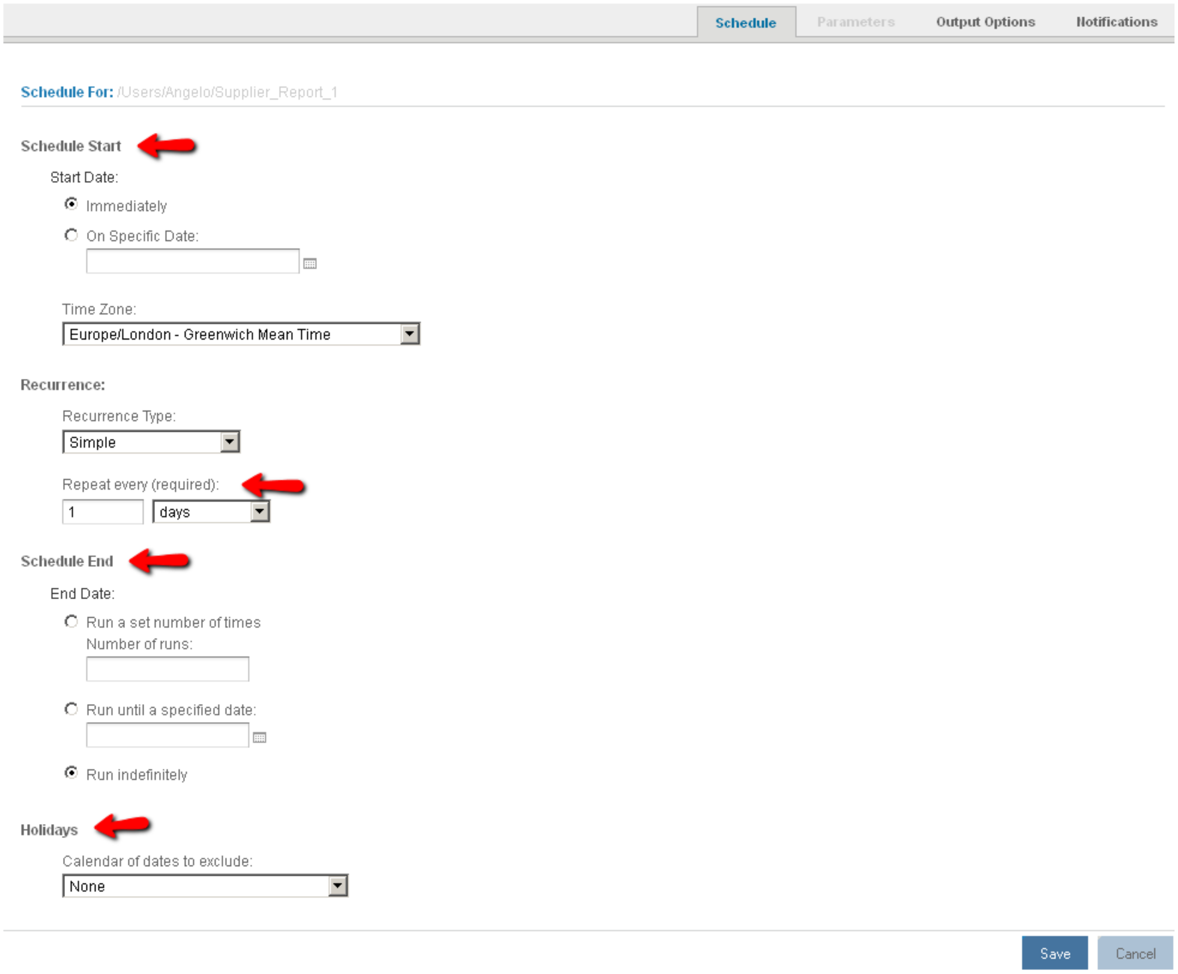
2. Click **Create Schedule**. The New Schedule page opens.

Figure 6–2 New Schedule Page



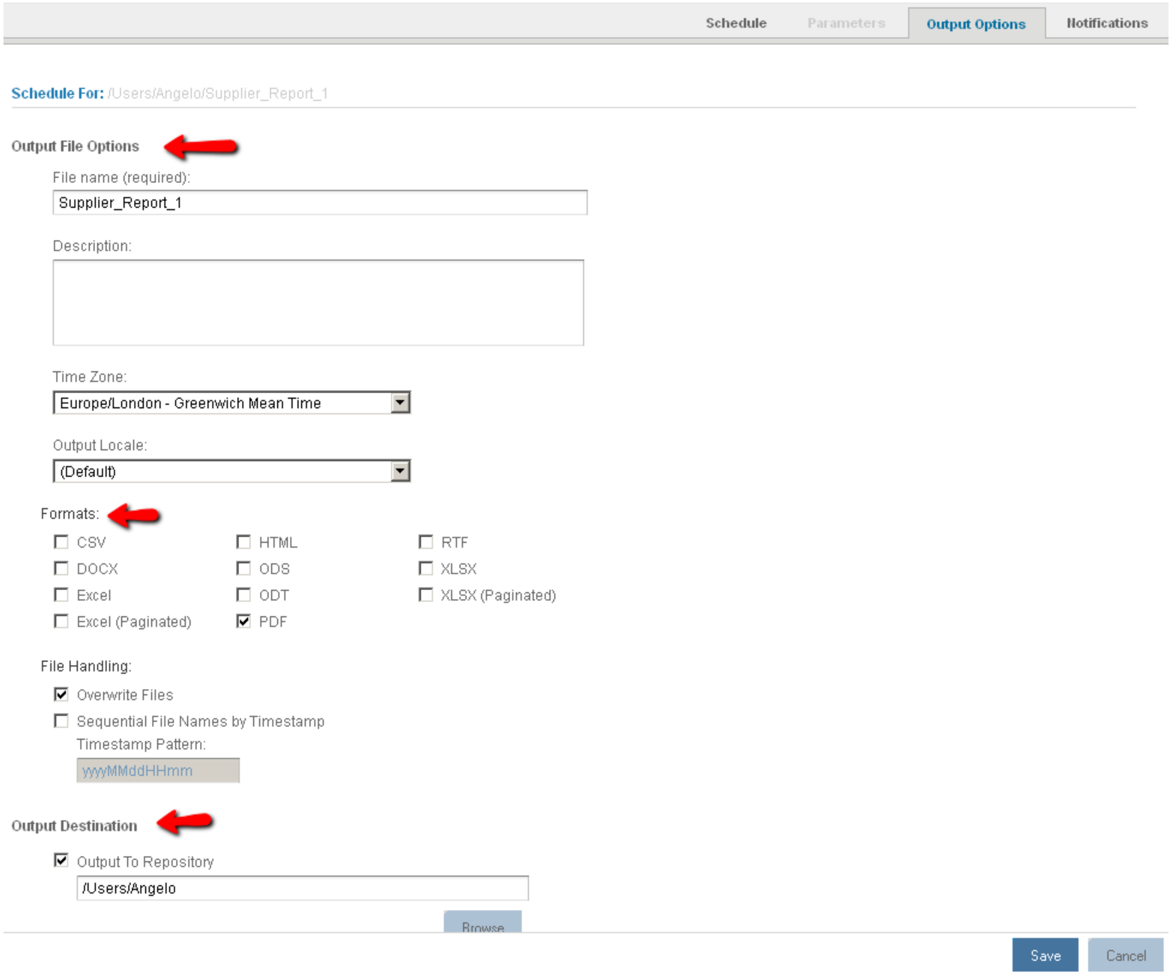
3. Using the Recurrence options, choose various parameters such as the frequency and the date when you want to stop running it.

Figure 6–3 Scheduler Recurrence Options



4. Use the output settings to choose where to store the report, the file format, and so on.

Figure 6–4 Scheduler Output Settings



7

Dashboards

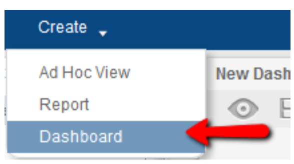
A Dashboard displays several reports (from different domains if required) in a single, integrated view. A Dashboard can include other Dashboards, input controls for choosing the data displayed in one or more frames, and custom frames that point to URLs for other content. By combining different types of related content, you can create appealing, data-rich Dashboards that quickly convey trends.

Creating a Dashboard

To create a new Dashboard:

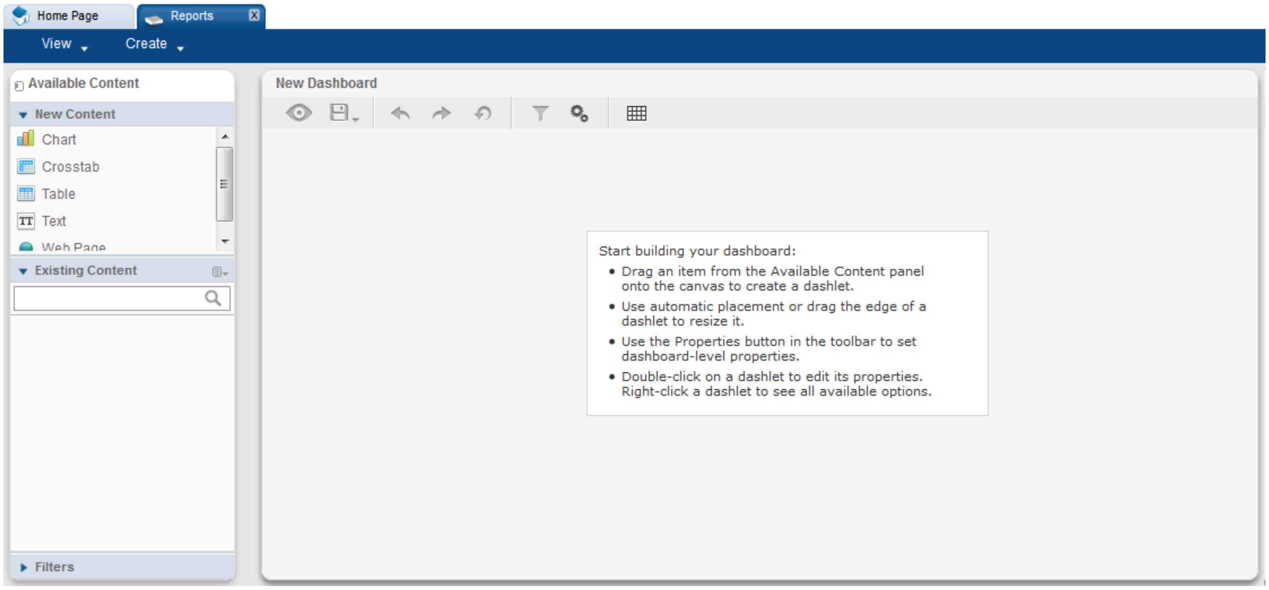
1. Open the View menu.

Figure 7–1 View Menu



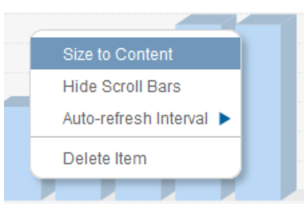
2. Select Dashboard. The Dashboard designer opens. It displays the list of available content and the canvas.

Figure 7–2 Dashboard Designer



3. To include content on your Dashboard, drag an item onto the canvas. You can add multiple items.
4. Once an item is added, such as a qReport, move it around to position it on the canvas:
   - Use the computer's arrow keys to move selected content one grid space at a time.
   - Press the Ctrl key to move the selected content a single pixel at a time.
   - To resize an item, use the resizing handles on the corner of the canvas.
5. To change an item's properties, right click the item in the Dashboard.

Figure 7–3 Item Properties Menu



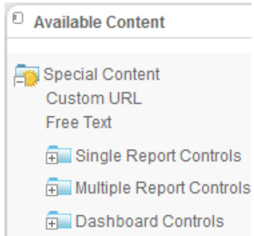
The following options are available:

- Size to Content
- Hide Scroll Bars
- Auto-refresh Interval
- Delete Item

Special Content Items

The Available Content panel contains several special content items. Each item is described in the following sections.

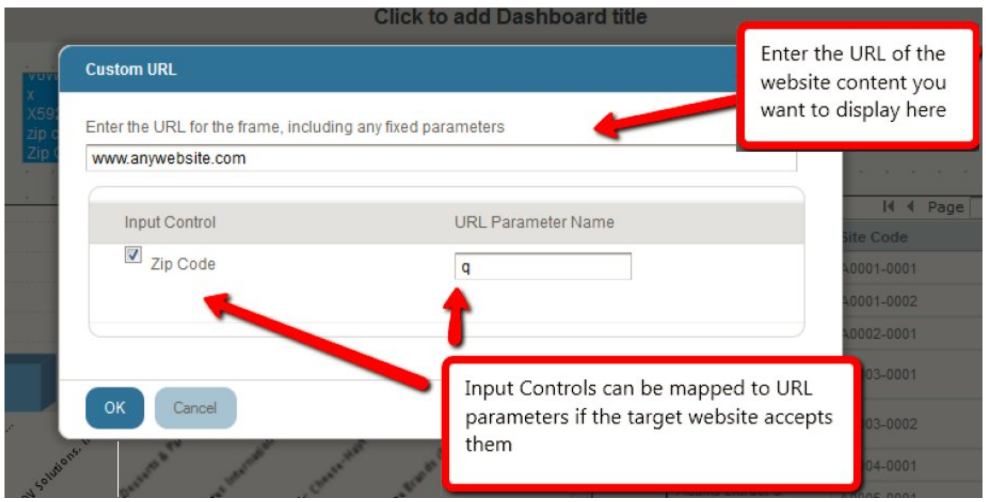
Figure 7–4 Available Content Panel



Custom URL

You can create a frame that displays URL-addressable content, for example, web pages. Such content combinations can help you leverage data from many sources in a single, integrated view.

Figure 7–5 Custom URL Dialog Box



Dragging the Custom URL item onto the Dashboard designer allows you to add a URL. By default, the server assumes that you want to use the HTTP protocol for custom URL frames. However, you can specify that it use the FILE protocol by entering file:// at the beginning of the value in the URL. In this, the server uses the FILE protocol, and looks for the file you specify in the server's WEB-INF directory. This is helpful for including images.

Custom URLs and Parameters

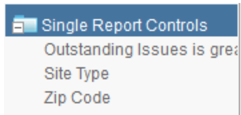
In addition, any input controls on the Dashboard (such as, report filters), can be mapped to URL parameters if accepted by a website. This allows you to incorporate frames with dynamic web content driven by input controls.

Free Text Control

A free-form text entry field. Resizing this type of item changes the size of the font in the label. Use free text items to add titles and instructional text to the dashboard.

Single Report Controls

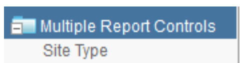
Figure 7–6 Single Report Controls Menu



If the Dashboard contains import controls such as, report filters), these are available as single report controls, which you can add to the dashboard in order to be able to change an item's content.

Multiple Report Controls

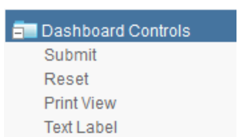
Figure 7–7 Multiple Report Controls Menu



If any of the items on your Dashboard contain the same input controls (such as, report filters), these are available as multiple report controls, which you can add to the dashboard to change content. These controls allow you to control all of the applicable reports using one report control.

Dashboard Controls

Figure 7–8 Dashboard Controls Menu



The Dashboards controls available consist of Submit, Reset, Print View, and Text Label controls. By default, a Dashboard automatically updates when you change the values in its input controls:

- When the Dashboard includes the Submit button, the server does not update the dashboard until you click the Submit button.
- The Reset button resets the values of the input controls to when the Dashboard was last saved.
- The Print View control displays the Dashboard without buttons or the server's header and footer, and (depending on the browser) opens the browser's Print window.
- The Text Label control identifies an input control. When you add an input control to the Dashboard, the server automatically adds a text label for it. Resizing this type of item only changes the size of the label itself; the font size in the label is fixed.

A

Appendix: Standard Sample Reports

This appendix summarizes the standard set of sample reports that are provided with the Reports module:

- Suppliers, Sites, and Contacts Reports
- Alerts Reports
- Audits & Visits Reports
- Library Report
- Product Specification Reports
- Projects Reports

Suppliers, Sites, and Contacts Reports

The following table lists the reports for suppliers, sites, and contacts.

Report	Summary
ADMIN - SUPPLIER - by billing codes and topgrade (no sites)	Search suppliers by Billing Code. Lists suppliers, showing Billing Code, Supplier Name and Code, Invoicing Ref, Creation Date, Main Contact Name and Email and Top Grade.
ADMIN - SUPPLIER - by billing codes & topgrade (with sites listed)	Search suppliers by Billing Code. Lists suppliers and their sites, showing Billing Code, Supplier Name & Code, Legacy Code, Creation Date, Main Contact Name & Email and Top Grade. For each site, the Site Name, Code & Status is shown, along with the Creation Date.
ADMIN - SUPPLIER - filter by created date	Search suppliers by their Creation Date (range). Lists suppliers and their sites, showing Billing Code, Supplier Name, Code & Type, Creation Date and Main Contact Name & Email. For each site, the Site Name, Code & Status is shown, along with the Retailer Contact and Business Category.
ADMIN - SUPPLIER - filter by Status or supplier or site	Search suppliers by Supplier Status and Site Status. Lists suppliers and their sites, showing Supplier Name, Code, Status & Type, Billing Code, and Main Contact Name & Email. For each site, the Site Name, Code & Status, Retailer Contact and Business Category is shown, along with the Creation Date.

Report	Summary
SUPPLIER - filtered by SITE address	Search suppliers by Supplier Status, Site Status and Site Address. Lists suppliers and their sites, showing Supplier Name, Code, Status & Type, Billing Code, Address and Main Contact Name & Email. For each site, the Site Name, Code & Status, Retailer Contact and Business Category is shown, along with the Address.
SUPPLIER - Supplier and site list filtered by Site Status	Search suppliers by Site Status. Lists suppliers and their sites, showing Supplier Name & Code. For each site, the Site Name & Code is shown.
SUPPLIER AND SITE - Combined Spreadsheet	No search criteria. Lists suppliers and their sites, showing Supplier Name, Code, Country, Main Contact Name & Email and Top Grade. For each site, the Site Name, Code, Status, Country, Legacy Code, Retailer Contact and Business Category is shown, along with the Creation Date.
SUPPLIER AND SITE - no contacts at site level	Search suppliers by Supplier Name. Lists suppliers and their sites, showing Supplier Name, Code and Top Grade. For each site, the Site Name & Code, Business Category, Legacy Code and Retailer Contact is shown.
CONTACT - for all sites	Search contacts by Contact Type and Role. Lists contacts, showing Contact Name, Email, Phone Numbers and Contact Type & Role. The Supplier Name & Code and Site Name, Code & Status are also shown.

Alerts Reports

The following table lists the reports for alerts.

Report	Summary
ADMIN - ALERT - outstanding alerts for sites / suppliers	Search alerts by Supplier Code. Lists alerts, showing Supplier Name & Code, the number of alerts outstanding and number of days overdue, along with the Response Required By date,, the Alert Status & Title and Creation Date.
ALERTS -responses for alerts (filtered by alert title and question if required)	Search alerts by Title and Question. Lists alert responses, showing the Alert Title, Description, Status, Response Required By date, Supplier Name & Code and Site Name & Code. Each Question is shown, along with details of the response.

Audits & Visits Reports

The following table lists the reports for audits and visits.

Report	Summary
AUDIT (dash1) - main data filtered by name and date	Search audits/visits by Audit/Visit Name, Auditor, Audit/Visit Date (range) and Audit/Visit Status. Lists audits/visits showing Audit/Visit Name, Standards & Status, the Retailer Contact (Lead Technologist), Auditor when it was Conducted and any Score, along with the Supplier Name & Code, Site Name, Code & Status.
AUDIT (dash2) - main data filtered by name and date	Search audits/visits by Audit/Visit Name, Auditor, Audit/Visit Date (range) and Status. Lists audits/visits showing Audit/Visit Name, Standards, Reference/Clause & Status, the Retailer Contact (Lead Technologist), Auditor when it was Conducted and any Score, along with the Supplier Name & Code and Site Name, Code & Status.
AUDIT (dash3) - Xtab issues count by reference	Search audits/visits by Audit/Visit Name, Audit/Visit Date (range) and Status. A cross-tab of audits/visits, showing a count of issues for each Audit/Visit Name per Audit/Visit Reference, along with overall totals.
AUDIT (dash4) - Xtab issues count by quarter & reference	Search audits/visits by Audit/Visit Name, Audit/Visit Date (range) and Status. A cross-tab of audits/visits, showing a count of issues for each Audit/Visit Name per Audit/Visit Reference, by Quarter/Year, along with overall totals.
AUDIT (dash5) - graph of issues by reference	Search audits/visits by Reference, Audit/Visit Name, Audit/Visit Date (range) and Status. A bar chart graph of audits/visits, showing a count of issues for each Audit/Visit Name per Audit/Visit Reference.
AUDIT (dash6) - pie chart of issues by reference	Search audits/visits by Reference, Audit/Visit Name, Audit/Visit Date (range) and Status. A pie chart graph of audits/visits, showing a count of issues for each Audit/Visit Name per Audit/Visit Reference.
AUDIT (EXOVA) - main data filtered by name and creation date	Search audits/visits by Audit/Visit Name, Auditor, Audit/Visit Date (range) and Status. Lists audits/visits showing Audit/Visit Name, Standards, & Status, the Retailer Contact (Lead Technologist), Auditor, date when it was Conducted and any Score, along with the Supplier Name & Code and Site Name, Code & Status.
AUDIT - by supplier with total number of issues	Search audits/visits by Supplier Code. Lists audits/visit and their issues, showing Supplier Name & Code and Site Name & Code, along with the audit/visit's Comment, Introduction, Scope, Summary and any Score. The Type, Number and Status of any of issues is also shown.
AUDIT - main details filtered by Supplier name	Search audits/visits by Supplier Code. Lists audits/visit, showing Supplier Name & Code, Site Name, Code, Risk Level & Top Grade along with the Audit/Visit Name and Completion Date.
SITE & AUDIT - by technical manager (last audit or visit details)	Search audits/visits by Retailer Contact. Lists sites, showing Supplier Name & Code and Site Name & Code, along with details of the site's Certificates, Top Grade, Business Unit, Invoicing/Reference details, Other Production Details and Retailer Contact.

Report	Summary
SITE & AUDIT - last audit or visit details	Search audits/visits by Supplier Code. Lists sites, showing Supplier Name & Code and Site Name & Code, along with details of the site's Certificates, Top Grade, Risk Level, Further Info and Other Production Details.
SUPPLIER & AUDIT - database report (SSDB)	Search suppliers by Retailer Contact (Lead Technologist). Lists suppliers and sites and their audits/visits, showing Supplier Name & Code, Retailer Contact (Lead Technologist), Business Unit and Business Category. For each site, the Site Name, Code, Type & Status, Address and Risk Level is shown. For each audit/visit, the Audit/Visit Name, Type & Status, Risk Level, Dates, Location and any Score is shown.

Library Report

The following table lists the report for library.

Report	Summary
ADMIN - DOCUMENT - list of all documents by User (supplier and site)	Search documents by Supplier Name. Lists documents, showing Supplier Name & Code, Company Name & Code, Site Name & Code, Document Title, Date Read, Recipient Type, Required Read Date, along with whether the document has been Read or is Overdue.

Product Specification Reports

The following table lists the reports for product specifications.

Report	Summary
SPECIFICATION (FNF) - filtered by Chemical(s) & Country of Origin	Search product specifications by Specification Type, Ingredient and Country of Origin. Lists product specifications, showing Specification Number, Version, Product Title, Product Record Number, Section Name, Ingredient Name and Country of Origin.
SPECIFICATION (FNF) - Filtered by specific country & Country of Origin	Search product specifications by Specification Type, Ingredient (full or partial name match) and Country of Origin. Lists product specifications, showing Specification Number & Version, Product Title, Product Record Number, Section Name, Ingredient Name and Country of Origin. Supplier Name & Code and Site Name & Code is also shown.
SPECIFICATION (FNF) - Multiple ingredients search specific ingredient & Country of Origin	Search product specifications by Specification Type, Ingredient and Country of Origin. Lists product specifications, showing Specification Number & Version, Product Title, Product Record Number, Section Name, Ingredient Name and Country of Origin. Supplier Name & Code and Site Name & Code is also shown.
SPECIFICATION (FOOD) - List filtered by type and status	Search product specifications by Specification Type and Status. Lists product specifications, showing Specification Number, Version, Name & Type. Supplier Name & Code and Site Name & Code is also shown.

Report	Summary
SPECIFICATION (FOOD) - All allergens with suitable = yes	Search product specifications by Specification Type, Status, Product Substance/Allergen Type and Suitable For. Lists product specifications, showing Specification Number & Name, Quantity, Variant Name and Business Category, along with the Product Substance/Allergen Type, and whether Present In Product or Risk of Cross Contamination.
SPECIFICATION (FOOD) - ALLERGEN - Gluten & NO report (Question as user filter)	Search product specifications by Specification Type, Status, Product Substance/Allergen Type, Present in Product, Suitable For and Business Category. Lists product specifications, showing Specification Number, Version & Status, Product Title and Business Category.
SPECIFICATION (FOOD) - ALLERGEN - SUITABLE FOR COELIACS	Search product specifications by Specification Type, Status, Product Substance/Allergen Type and Suitable For. A cross-tab of product specifications by Business Category Level 1, showing the Specification Name and Product Number and Quantity. The count of Product Substance/Allergen Type present or not present is shown, along with overall totals.
SPECIFICATION (FOOD) - ALLERGEN is yes report (Question as user filter)	Search product specifications by Specification Type, Status, Product Substance/Allergen Type and Present in Product. Lists product specifications, showing Specification Number, Version & Status, Product Title, along with the Product Substance/Allergen Type and if it is Present in Product.
SPECIFICATION (FOOD) - CONTAINS is yes report (multiple Question as filter)	Search product specifications by Specification Type, Status, Product Substance/Allergen Type, Present in Product and Business Category. Lists product specifications, showing Specification Number, Version & Status, Product Title & Number, Business Category and Product Substance/Allergen Type, along with Supplier Name & Code and Retailer Contact.
SPECIFICATION (FOOD) - CONTAINS is yes report (Question as user filter)	Search product specifications by Specification Type, Status, Product Substance/Allergen Type, Present in Product and Business Category. Lists product specifications, showing Specification Number, Version & Status, Product Title & Number, Business Category and Product Substance/Allergen Type. Supplier Name & Code and Site Name & Code is also shown.
SPECIFICATION (FOOD) - filtered by developer and status	Search product specifications by Retailer Contact and Specification Status. Lists product specifications, showing Specification Number, Version & Status, Product Title and Product Record Number.
SPECIFICATION (FOOD) - ingredients search for specific ingredient	Search product specifications by Ingredient (full or partial name match) and Specification Type. Lists product specifications, showing Specification Number & Version, Supplier Name & Code, Product Record Number and Ingredient Name.
SPECIFICATION (FOOD) - ingredients search for specific ingredient & Country of Origin	Search product specifications by Ingredient (full or partial name match), Country of Origin and Specification Type. Lists product specifications, showing Specification Number & Version, Product Title, Product Record Number, Country of Origin and Ingredient Name.

Report	Summary
SPECIFICATION (FOOD) - ingredients search many ingredient & Country of Origin	Search product specifications by Ingredient (full or partial name match), Country of Origin and Specification Type. Lists product specifications, showing Specification Number & Version, Product Title & Number, Product Record Number, Section Name, Country of Origin and Ingredient Name. Supplier Name & Code and Site Name & Code is also shown.
SPECIFICATION (FOOD) - ingredients search many ingredient & Country of Origin & supplier	Search product specifications by Ingredient (full or partial name match), Country of Origin, Specification Type, Supplier Name and Raw Material Supplier Name. Lists product specifications, showing Specification Number & Version, Product Title & Number, Product Record Number, Section Name, Country of Origin, Country where Processed and Ingredient Name. Supplier Name and Raw Material Supplier Name is also shown.
SPECIFICATION (FOOD) - Main Nutrition Report table (not crosstab so nutrient per row)	Search product specifications by Business Category, Supplier Name, Specification Status and Nutrient Name, Sub Brand and Sub Category. Lists product specifications, showing Specification Name, Number & Status, Business Category, Product Number, Supplier Name, Serving Quantity & Unit, Nutrient & Unit and per 100g/Per Serving As Sold values.
SPECIFICATION (FOOD) - specific ingredient FREE search in ingredients list	Search product specifications by Specification Type, Ingredient Name (full or partial name match), Business Category and Specification Status. Lists product specifications, showing Specification Number & Version, Product Title, Product Record Number and On Pack Ingredients List.
SPECIFICATION (FOOD) - specific nutrient value	Search product specifications by Serving Quantity, Nutrient Name and Per 100g As Sold value. Lists product specifications, showing Specification Number & Version, Status & Name, Serving Quantity, Nutrient Name and per 100g As Sold value.
SPECIFICATION (FOOD) - Suitable For is yes report (Question as user filter)	Search product specifications by Specification Type, Status and Suitable For. Lists product specifications, showing Specification Number, Version & Status, Product Title & Number, Business Category and Suitable For.
SPECIFICATION (NON FOOD) - List filtered by type and status	Search product specifications by Specification Type and Status. Lists product specifications, showing Specification Number & Version, Status & Name and Supplier Name & Code.
SPECIFICATION - count of specs by created day	Search product specifications by Creation Date (range). A cross-tab of product specifications, showing a count of specifications for each Type/Project Type per month with overall totals.
SPECIFICATION - Developer Report (cross tab)	Search product specifications by Business Category, Supplier Name, Specification Status and Nutrient Name, Sub Brand, Sub Category and Section Name. A cross-tab of product specifications, showing Product Category, Brand & Sub Brand, Variant Name, Quantity, Specification Number & Version, Supplier Name & Code, Serving Quantity, Product Code and On-pack Ingredients List, For each nutrient, the Per 100gAs Sold values are shown.

Report	Summary
SPECIFICATION - List	No search criteria. Lists product specifications, showing Specification Number & Version, Status, Type & Name and Supplier Name & Code.
SPECIFICATION - List by Project type, Spec type and spec status	Search product specifications by Specification Type and Project Type. Lists product specifications, showing Specification Number, Version, Type & Status, Project Type, Business Category, Supplier Name & Code and Details of Amendments.
SPECIFICATION - List filtered by type and status	Search product specifications by Specification Type and Status. Lists product specifications, showing Specification Number & Version, Status & Name and Supplier Name & Code.
SPECIFICATION - List filtered by type and status 2	No search criteria. Lists product specifications, showing Specification Number, Version, Type, Status & Name and Supplier Name & Code.
SPECIFICATION - List filtered by type, status, and supplier	Search product specifications by Specification Type, Status and Supplier Name. Lists product specifications, showing Specification Number & Version, Status & Name and Supplier Name & Code.
SPECIFICATION - Salt Report	Search product specifications by Specification Type, Status, Specification Number (range), and Nutrient. Lists product specifications, showing Specification Number & Version, Status & Name, Business Category, Supplier Code, Variant Name, Product Title and Per 100g/Serving As Sold values.
SPECIFICATION - Weekly Tracker (SCLM/TM)	Search product specifications by Specification Type, Project Type, Retailer User, and Status. Lists product specifications, showing Specification Number, Version, Type, Name & Status, Supplier Name & Code, Site Name & Code, Business Category, Project Type, Details of Amendments and Retailer Contacts.

Projects Reports

The following table lists the reports for projects.

Report	Summary
PROJECT - all activities for ongoing projects	Search projects by Template Type. Lists project activities, showing Project Title, Id, Type & Status, Template Name, Project Manager Name, Artwork Project Number, Specification Type, Brand & Sub Brand, Business Category, Supplier Name and Number of Lines.
PROJECT - Monthly (due date) - outstanding days by user role and activity	Search projects by Responsible User Role & Name. A cross-tab of projects, showing a count of overdue days for each Project Title per activity by Month/Year, along with overall totals.
PROJECT - number of products summarized by month	Search projects by Project Status, Responsible User Role & Name, Project Manager Name and Template Type. A cross-tab of projects, showing a count of product projects for each Project Title per Month/Year, along with overall totals.

Report	Summary
PROJECT - number of projects summarized by month	Search projects by Project Status, Responsible User Role & Name, and Project Manager Name. A cross-tab of projects, showing a count of projects for each Project Title per activity by Month/Year, along with overall totals.
PROJECT - 2 Spec Tracker	Search projects by Specification Type, Status and Number (range). Lists product specifications, showing Specification Number, Version, Type, Status & Name, Project Type, Details of Amendment and Supplier Name & Code. Details of the Retailer and Supplier Approval are also shown.

Glossary

ad hoc editor

The interactive report designer in Reports. Starting from a collection of fields predefined in a Topic or selected from a Domain, the Ad Hoc Editor lets you drag and drop report elements to draft, preview, and finalize qReports. qReports can be run, printed, and scheduled within Reports. In addition, qReports may be reopened in the Ad Hoc Editor, further modified, and saved.

dashboard

A collection of reports, input controls, graphics, labels, and web content displayed in a single, integrated view. Dashboards often present a high-level view of your data, but input controls can parameterize the data to display. For example, you can narrow down the data to a specific date range. Embedded web content, such as other web-based applications or maps, make dashboards more interactive and functional.

domain

A virtual view of a data source that presents the data in business terms, allows for localization, and provides data-level security.

domain topic

A topic that is created from a Domain by the Data Chooser. A Domain topic is based on the data source and items in a Domain, but it allows further filtering, user input, and selection of items.

field

A field is equivalent to a column in the relational database model. Fields originate in the structure of the data source, but you may define calculated fields in a Domain or custom fields in the Ad Hoc Editor. Any type of field, along with its display name and default formatting properties, is called an item and may be used in the Ad Hoc Editor.

group

In a report, a group is a set of data rows that have an identical value in a designated field:

- In a table, the value appears in a header and footer around the rows of the group, while the other fields appear as columns.
- In a chart, the field chosen to define the group becomes the independent variable on the X axis, while the other fields of each group are used to compute the dependent value on the Y axis.

iReport

A report designed using iReport Designer, for reports which require data from multiple domains and/or a specific design. iReports can be uploaded into and stored in the Reports repository and run like any other report.

iReport Designer

An open source tool for graphically designing reports to create cross domain and/or pixel-perfect reports. iReports can be uploaded into the Reports repository and run like any other report.

measure

In a report, a formula that calculates the values displayed in a table's columns, a crosstab's data values, or a chart's dependent variable (such as the slices in a pie).

qReport

A report designed using the Ad Hoc Editor using data from one reporting domain. qReports are stored in and run from the Reports repository.

repository

The tree structure of folders that contain all saved reports, dashboards, and resources.