Business Application Intelligence | Manual

Click&DECiDE



Business Application Intelligence

Reports - Graphs & Alerts User Manual

New Click&DECiDE 2015

64-bit

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1. Using Reports

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

1.1. Creating a new report from a Query

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

🛃 Ne	w 🚰 Open 📔 🗙 Delete	
Name	🙀 New Report	Δ
	Inserts a new report	

This command will ask you to choose among:

New Report		×
2	Blank Report Report from Query Report Book Report from Raw Cross Table Data	

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

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

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

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

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

Steps:

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

Data Source Item: 🔤 demo_multicriteria

3. A default Report Template is proposed:

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

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





Report Template	Preview (Double-click to enlarge)
Standard Customized	
<no template=""></no>	
Portrait A4 Blue Glass Header Extended Arial	
Portrait A4 Green Glass Header Extended Arial	
Portrait A4 Orange Glass Header Extended Arial	
Portrait A4 Bordeaux Glass Header Extended Verdana	
Portrait A4 Grey Glass Header Extended Verdana	10 mm 1 Par 100 000 10 mm 2 Par 100 000 10 mm 2 Par 100 10 mm 1 Par 100
Portrait A4 with 3D Bevel Blue	10 arr 10 00 00 00 00 00 00 00 00 00 00 00 00
Portrait A4 with 3D Bevel Grey	
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- 4. Select the one you like and click **OK**. See also later how to create your own report templates using the command **Tools> Report Templates** command.
- 5. Click **OK** to get automatically a new report with the following blocks or sections by default: Report Header, Page Header, Details, Page Footer, Report Footer.

1.2. Saving a Report

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

Save As		×
-Save 'demo_r	nulticriteria1'	OK
New Name:	Report Training	Cancel

Modify the name if required and click OK.

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

perties	Þ
rt Training	
_multicriteria	
3/2010 6:01:53 PM	
5/2010 11:02:16 AM	
	ort Training o_multicriteria 8/2010 6:01:53 PM 5/2010 11:02:16 AM

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

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

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





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

1.3. Deleting a Report

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

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

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

1.4. Reports Blocks

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

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

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

Details: printed on any page, containing the detailed records

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

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

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

_		1		2	• 3 • • • 1 •	4	· 5	•••••••••••••••••••••••••••••••••••••••
		🔍 🖓 🍁 Report Hea	ader					
		🔍 🖓 🌳 Page Head	ler					
ŀ								This is the limit width of the page
:					demo_i	multicriteri	a	modifiable in the Page Setup
:		Area	Code	Salesman name	Date	Amount		
	1	🔍 💡 🍁 Details						
	ſ	AREA	SUSAL	SALNAME	. DAT	E TOTAL		
		🔍 🖓 🍁 Page Foote	er					
ŀ	ŀ	='Printed on '+Formal	DateTime('d	dddd d of mmmm, yyyy)-	ŀa::::::	111 1 🛸 1 1	='dor	pyright @ Click & DECIDE : : : ='Page :
		Part Report Foo	iter			-		
.				· · · · · · · · · · · · · · · · · · ·	· · · · · · ·			ne Report Footer height if you use it

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

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

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

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

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



1.4.1. General Block and Fields Properties

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

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

1.4.1.1. Form Feed Property:

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

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

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

1.4.1.2. New Row or Column Property:



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

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

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

1.4.1.3. Insecable Block Property

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

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

1.4.1.4. Visible Property

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

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

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

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

1.4.1.5. Height Property

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

1.4.1.6. Width Property

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





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1.4.1.7. Can Grow and Can Shrink Properties

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

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

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

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

1.4.1.8. Background Style Property

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

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

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

1.4.1.9. Background Color Property

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

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

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

- Use that button to display the available colors

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

1.4.1.10. Background Color 2 Property

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

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

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

Use that button to display the available colors

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

1.4.1.11. Border Effect Property

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



Click&DECIDE Business Application Intelligence
Use that button to display the available border aspects in the combo-box list.
\Box Use that button on the Report Format Toolbar to apply directly a border effect to the block or field:
Sample 2D -The object appears flat.
Sample 3D -The object has a highlight on the top and the left, and a shadow on bottom and right.
Sample 3D Down -The object has a shadow on the top and the left, and a highlight on bottom and right.
Sample Grave -The object has a sunken line surrounding the control.
Sample Shadow - The object has a shadow below and to the right of the control.
Sample 3D Underline - The object has a sunken line below the control.
1.4.1.12. Border Style Property
This property allows to specify the border style for a section (block) or an item (field).
Use that button to display the available border styles in the combo-box list.
Use that button on the Report Format Toolbar to apply directly a border style to the block or field:
Transparent Default value. The border is not visible when editing or printing.
Solid The border is visible as a solid line.
Dash The border is visible as a dash line.
Point The border is visible as a point line.
Dash-Point The border is visible as a dash-point line.
Dash-Point-Point The border is visible as a dash-point-point line.
1.4.1.13. Border Color Property
This property allows to specify the border color for a section (block) or an item (field). The Border Color property uses as parameter a number corresponding to a specific color.
Use that button to display the available colors
Use that button to generate a customised color.
Use that button on the Report Format Toolbar to apply directly a border color to the block or border field.
1.4.1.14. Border Weight Property
This property allows to specify the border weight for a section (block) or an item (field).
Use that button to display the available border weight in the combo-box list.
Lies that button on the Depart Format Tealbar to apply directly a weight to the black or field barder

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

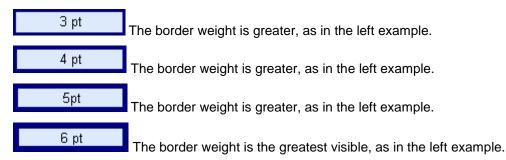
Transparent Default value. The border weight is not visible when editing or printing.

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

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

1 pt





1.4.1.15. Bookmark Property

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

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

Properties	џх			
Section : Report Header				
4 General Format Data All	⊳			
Bookmark Sales Dashboard				

But you also can use the <u>is</u> to generate a formula for the bookmark you need to display, example:

Properties	џ	×
Section : Report Header		
4 General Format Data All		Þ
Bookmark ='Sales Dashboard_' + Str(Year(ToDay())) + '_' + Str(Month(ToDay())))	

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

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

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

1.4.1.16. Highlight Property

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

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

💡 Highlight											X
Conditions:		*)	4	\boldsymbol{x}	•	÷	×	,∦	Ж	Ē2	B
AREA = 'WEST'											
Attributes											
Visible	Yes										
Background Style	Opaque										
Background Color	E &H0000C00	300									

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





💡 Highlight	
Conditions:	🖺 🏠 🗙 🗲 🗲 🧏 👗 🗎 🛍
TOTAL < 100	
Attributes	
Visible	(Not defined)
Font	(Not defined)
Font Size	(Not defined)
Bold	Yes
Italic	(Not defined)
Underline	(Not defined)
Strikeout	(Not defined)
Background Style	Opaque
Background Color	AH00C0FFFF&
Text Color	&H000000FF&
Format	(Not defined)
Hyperlink	(Not defined)
Preview	
	\$123,456.79
	OK Cancel <u>H</u> elp

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

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

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

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

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

💡 Highlight										x
Conditions:	Ľ	<u>n</u>	\times	•	÷	×	,∦	Ж	Ē	Ē.
TOTAL < 100000 TOTAL >=100000 and TOTAL >=200000 and TOTAL >= 300000						-				
Attributes Visible (N	ot defined)									
Background Color (N Text Color		k								

The second condition will give an orange number if true:





💡 Highlight											×
Conditions:		* *)	<i>:</i> .\	×	•	÷	×	*	Ж	Ē	Ē.
TOTAL < 100000											
TOTAL >=100000	and TOTAL <	20000	0								
TOTAL >=200000	and TOTAL <	30000	0								
TOTAL >= 300000											
 Attributes 											
Visible	(Not defined)										
Background Color	(Not defined)										
Text Color	E &H00008	OFF&									

The third condition will give a green number if true:

🖓 Highlight	
Conditions:	🖺 🖄 🗙 🗲 🗲 🔀 👗 🖻 💼
TOTAL < 100000 TOTAL >=100000	and TOTAL < 200000
TOTAL >=200000 TOTAL >= 300000	and TOTAL < 300000
Attributes Visible	(Not defined)
Background Color Text Color	(Not defined)

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

💡 Highlight						×
Conditions:		答 🐴	×÷	↓ ★	-⊀3 &	Ba 💼
TOTAL < 100000 TOTAL >=100000 TOTAL >=200000	and TOTAL < 30					
TOTAL >= 300000						
Attributes Visible	(Not defined)					
Background Color Text Color Format Hyperlink		0&				
Preview	:	\$123,45	6.79			
		0	K	Cance	!	<u>H</u> elp

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

For a **Report Static Field**, a highlight can affect the same attributes list as a Dynamic Field, but also a specific attibute named "Text" allowing to modify a Label Title according to a condition.

<u>Example</u>: in a report a Label Title display the word "Date" by default, when the report is run on a Daily basis. But sometime the same report can be run on a Hourly basis, and in that case the information displayed in the same column will be hour instead of days. The following Highlight condition can modify the Label Title and display "Time" instead of "Date":

💡 Highlight								×
Conditions:		**)	\times	+	÷	x x	\$ %	🖻 💼
param_date = 'Hou	urly'							
- Attributes								
Visible	(Not defined)							
Font	(Not defined)							
Font Size	(Not defined)							
Bold	(Not defined)							
Italic	(Not defined)							
Underline	(Not defined)							
Strikeout	(Not defined)							
Background Style	(Not defined)							
Background Color	(Not defined)							
Text Color	(Not defined)							
Format	(Not defined)							
Hyperlink	(Not defined)							
Text	Time							
Preview								
		Т	ïme					
			OK		C	ancel		Help

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





💡 Highlight											×
Conditions:		٣)	48	×	•	÷	×	1	Ж	Ē,	Ê.
TOTAL < 100000											
Attributes											
Visible	(Not defined)										
Background Style	(Not defined)										
Background Color	(Not defined)										
Image	:\dvweb\App_	The	mes\	Click	and	DEC	iDE\Ir	nages'	∖can	cel.gi	f
Image Type	Link										
Draw Mode	Homothetic										
Horizontal Alignment	Center										
Vertical Alignment	Тор										
- Preview											
FIEVIEW		(8								
			0	к		C	Cance			<u>H</u> elp	

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

/ Highlight	⊠ ⊠ ∰ & & ⊁ ≁ ★ & ©
Lonations:	∷:``` ▼ ▼ ★ ★** ★2} ∞ == ■
TOTAL < 100000	
TOTAL >=100000 an	d TOTAL < 200000
Attributes	
Visible	(Not defined)
Background Style	(Not defined)
Background Color	(Not defined)
Image	vweb\App_Themes\Click and DECiDE\Images\highlights.gif
Image Type	Link
Draw Mode	Homothetic
Horizontal Alignment	Center
Vertical Alignment	Тор
Deview	
Preview	?

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





💡 Highlight	
Conditions:	🖺 🏠 💥 🗲 🗲 🔏 🖺 🛍
TOTAL < 100000 TOTAL >=100000 ar TOTAL >=200000 ar	
Attributes	
Visible	(Not defined)
Background Style	(Not defined)
Background Color	(Not defined)
Image	vroot\dvweb\App_Themes\Click and DECiDE\Images\ok.gif
Image Type	Link
Draw Mode	Homothetic
Horizontal Alignment	Center
Vertical Alignment	Top
Preview	

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

💡 Highlight	×
Conditions:	🖺 🖄 🗙 🗲 🗲 🧏 🐰 陆 🛍
TOTAL < 100000 TOTAL >=100000 ar TOTAL >=200000 ar TOTAL >= 300000	
Attributes	
Visible	(Not defined)
Background Style	(Not defined)
Background Color	(Not defined)
Image)ot\dvweb\App_Themes\Click and DECiDE\Images\infos.gi i
Image Type	Link
Draw Mode	Homothetic
Horizontal Alignment	
Vertical Alignment	Тор
Preview	
	() OK Cancel <u>H</u> elp

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

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





	-		demo_mu	Ilticriteria		-
Area	Code	Salesman name	Date	Amount		
Salesman for	the Area A	TLANTIC				
ATLANTIC	4	4 Diane Meyer	3/15/2010	\$226,166.00		
ATLANTIC	4	4 Diane Meyer	6/16/2010	\$167,186.00	Q	
ATLANTIC	4	4 Diane Meyer	6/18/2010	\$158,318.00	Q.	
ATLANTIC	4	4 Diane Meyer	10/27/2010	\$56,262.50	×.	
ATLANTIC	4	4 Diane Meyer	11/6/2010	\$224,130.00	O	
ATLANTIC	4	4 Diane Meyer	11/27/2010	\$87,451.10	8	
ATLANTIC	4	4 Diane Meyer	12/24/2010	\$197,882.00	Q	
Diane Meyer				\$1,117,395.60	÷	

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

- New Condition
- Edit Condition
- X Delete Condition
- Move Up Item
- Move Down Item
- Reset the selected attribute to (Undefined)
- Reset All attributes to (Undefined)
- 💑 Cut
- Copy
- 🛍 Paste

1.4.2. Copying the custom colors

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

Custom colors:
Define Custom Colors >>
OK Cancel

1.4.3. Specific Field Properties

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



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





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

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

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

1.4.3.1. **Name Property**

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

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

1.4.3.2. **Data Source Property**

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

1.4.3.3. **Aggregate Property**

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

1.4.3.4. **Child and Parent Data Link Property**

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

1.4.3.5. **Assign to parameter Property**

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





1.4.3.6. Text Property

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

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

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

Text Editor: Text31 The best reporting tool. The best query tool. a Built-in powerfull chart editor. a Built-in multidimensional analytic tool. Use Multiple heterogen data source in your report.		* III	OK Cancel
Automation enable.	Þ	Ŧ	

Will give this result in the Report:

Key Features

- The best reporting tool.
- The best query tool.
- a Built-in powerfull chart editor.
- a Built-in multidimensional analytic tool.
- Use Multiple heterogen data source in your report.
- Automation enable.

1.4.3.7. Format property

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

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

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

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



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

1.4.3.8. Left Property

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

1.4.3.9. **Top Property**

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

1.4.3.10. **Hide duplicates property**

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

1.4.3.11. **Image Property**

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

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

='%CND BAI SAMPLES%\Builder\' + "CATEGORY NAME" + '.JPG'

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

1.4.3.12. Image Type Property

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

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

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

Example:

C:\Program Files\Click and DECiDE\BAI\Templates\Images\cndlogo 45 45.png

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

1.4.3.13. **Draw Mode Property**

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





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

1.4.3.14. Horizontal Alignment

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

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

1.4.3.15. Vertical Alignment

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

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

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1.4.3.16. Series Property

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

1.4.3.17. **Data Properties**

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

1.4.3.18. **First Records Property**

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

Other Series Properties 1.4.3.19.

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

1.4.3.20. **Series in Rows**

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

1.4.3.21. **Reverse Data Order**

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

1.4.3.22. **Text Color Property**

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

Use that button to display the available colors.

Use that button to generate a customised color.

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

1.4.3.23. **Font Property**

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

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

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

Bold Property 1.4.3.24.

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

1.4.3.25. **Italic Property**

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

1.4.3.26. **Underline Property**

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

1.4.3.27. **Strikeout Property**

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

1.4.3.28. **Text Alignment Property**





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

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

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

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

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

1.4.3.29. Description Property

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

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

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

1.4.3.30. Hyperlink Property

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

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

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

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

an URL calling a PDF or HTML report including one or several parameters:

='/dvweb/display.aspx?__mnu_alias=Demonstration&__mnu_itemid=2357&__format=HTML&AREA_PARAM ='+AREA+'&__exec=1'.

1.4.3.1. Refresh Data

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

1.4.3.2. Apply defined levels

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

1.4.3.3. Display Property

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

1.4.3.4. Update Method

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





1.5. Report Properties

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

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

1.6. Report Toolbars and Look

You can modify the report look by using the commands:

1.6.1. **View> Ruler**

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

· · · · · · · · · · · · · · · · · · ·	• 🖓 🗣 Report Head	er	
● ◊ +! Report Header • • • • • • • • • • • • • • • • • • • •		· · · · · · · · · · · · · · · · · · ·	
O Pri Page Header demo			demo_m
- Area Code Salesman_name Date	Area C	Code Salesman name	Date
With Ruler		Without Ruler	

1.6.2. View> Grid

This command will show or hic	de the grid:
I his command will show of hic	de the grid:

🔍 🖓 🍁 Details	🔍 💡 🌳 🛛 Details
AREA SAL SALNAME	AREA SAL SALNAME
●	● ♀ ♀! Page Footer
='Prihted on''+FormatDateTime('dddd d of mmmm, yyyy')+' ar	='Printed on '+FormatDateTime('dddd d of mmmm, yyyy')+' at
• • • Report Footer	• ? •! Report Footer
With Crid	Mahard Orid
With Grid	Without Grid

1.6.3. **View> Header and Footer Blocks**

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

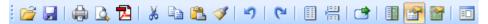


Use the command View> Page Header/Footer to display or remove with one click the Page Header Block and the Page Footer Block. Warning: when you remove these blocks, a message prevents you that you will lose their content.

1.6.4. **View Toolbar**

This command allows to display several Toolbars.

1.6.4.1. Toolbar



See the legend to know what icon is doing.

1.6.4.2. **Toolbox**



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





Use this toolbar to modify the objects and fields layout.

Alignment/Resize Bar 1.6.4.4.

ł		đ tu	-				0 <u>0</u> †	<u>10</u>	0	8	1				
---	--	------	---	--	--	--	--------------	-----------	---	---	----------	--	--	--	--

See the legend to know what icon is doing.

1.6.4.5. **Spacing Bar**

[메마막 맨] 응 한 왕

See the legend to know what icon is doing.

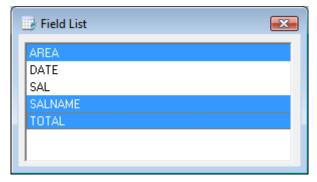
1.7. Reports Objects and Fields

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

Add a new query field 1.7.1.

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

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



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

1.7.2. Add a new report field or object

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



1.7.2.1. **Static Text (Label)**

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

1.7.2.2. **Dynamic field (Data/Formula)**

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

1.7.2.3. **Query Data**

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

1.7.2.4. **Picture**

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

1.7.2.5. Graph

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



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

1.7.2.6. **Cross-Table**

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

1.7.2.7. **Sub-Report**

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

1.7.2.8. Line

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

1.7.2.9. **ActiveX Control**

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



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

1.8. Creating Break Levels

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

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

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

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

Click and Decide Web Demonstration.wfy								
🄍 🍳 🕕 66	Name		Туре	Length	Scale			
Sales								
	NO	Varchar		5	0			
	CUST	Smallint		2	0			
	SAL	Smallint		2	0			
<u> </u>	DATE	TimeStan	np	8	3			
- <u> </u>	TOTAL	Float		8	0			
🗆 Salesman								
V	SAL	Smallint		2	0			
<u> </u>	SALNAME	Varchar		15	0			
<u>// - ??</u>	AREA	Varchar		10	0			
A.	ea	Code	Salesman Name	D	ate	Amount		
1 ATLANT	IC	4 0)iane Meyer	3/15/	/2013	\$226,166.15		

2. Create a Report using a Template:

• • + Report Header				
● ♥ ♥! Page Header				
		dem	o_multicriteria	
Area	Code	Salesman Name	Date	Amount
● ♥ ♥! Details				
AREA	SAL	SALNAME	DATE	
• • Page Footer				
	Time('dddd d of	ˈmmmm, yyyy')+'a		'Copyright @ Click & DECIDE
All the second secon				

- 3. Save this report as **Report Training** for example.
- 4. Now, click on the command **View> Field group** or on the 🛗 icon to get the following dialog box:



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💾 Field G	roup		×
		Group Properties	
Field Group			-
	AREA		
	DATE		
	SAL		
	SALNAME		
	TOTAL		

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

💾 Field Grou	p 💌
AREA	
	Group Properties
Field Group	AREA
Group Header	Yes
Group Footer	Yes
Sort Order	Ascending
Group On	Value
Keep Together	With First Detail 🔹

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

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

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

- 7. **Sort Order**: by default Ascending is proposed. You can switch to Descending or None. <u>Warning</u>: the None option can be used only if you are sure to get the data sorted in the query in a right way for the break levels.
- 8. Group on: make a choice among:

Group On	Value	•
	Value	
	First char	

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



Group On	Value
	Value
	Year
	Quarter
	Month
	Week
	Day of month
	Day
	Hour
	Minute
	Second

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

Group On	Interval
Range	1

- Value and Interval for a Numeric field: if Value is selected, the break level will be done on the • entire value content. If Interval is selected you can specify the interval range.
- 9. Keep Together: you can select an option among No, Entire group or With first detail.
 - If No is selected, a new page can be created regardless the state of the current break level
 - if Entire group is selected a page break will be done if the new Break level cannot be displayed or printed on the current page
 - if With first detail is selected, the new Break level will start on the current page only if several first detailed row can be displayed on the current page, if not a page break will be done.

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

💿 🖓 🍕 Report He	ader							
🔍 🖓 🌳 Page Head	der							
	demo multicriteria							
Area	Code	Salesman Nar	ne	Date	Amount			
💿 🖓 🍕 Group Hea	ader AREA							
AREA								
💿 🖓 🌳 Details								
AREA	SAL	SALNAME -		DATE				
💿 🖓 🍁 Group Foo	oter AREA							
AREA	Sum(SAL)				Sum(T¢TAL)			
💿 🖓 🌳 Page Foot	er							
='Printed on '+Form	atDateTime('dddd d of	ຳກາກາກກຸ່ງງາງງ່າ+ຳ ສ	· · · · · · · ·	: 🍓 : : : : =	Copyright © Click & DECiDE			
💿 🖓 🌳 Report Fo								

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



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

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

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

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

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

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

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

The Report should like as the next picture:

💿 🖓 🍕 Report Header					
• 🖓 •! Page Header					
		d	emo_mu	lticriteria	
Area	Code	Salesman Nan	ne	Date	Amount
💿 🖓 🍁 Group Header.	AREA				
='Salesmen for the	e Area '+ARĘ/	A			
Operation of the second sec					
AREA	SAL	SALNAME .		DATE	
🔍 🌻 🌳 Group Footer A	AREA				
='Sub-total for the	Area :+ARE <mark>A</mark>				Sum(TOTAL)
• 🖓 •! Page Footer					
='Printed on '+FormatData	eTime('dddd d of	mmmm, yyyy')+' at	· · · · · · · ·	: 🍓 : : : =	Copyright © Click & DECIDE
Part Pooter					

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





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

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

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

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

💿 🖓 🌳 Page Foot	ter			•				
='Printed on' '+Form	atDateTime('dddd d o)f (nmmm, yyyy')+' a		· · · · ·	: 🍓 :	· · ·='	Copyright © Click & DECiDE	:::
● 🖓 🗣 Report Footer								
Main Total:						Sum(TOTAL)	

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

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

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

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

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





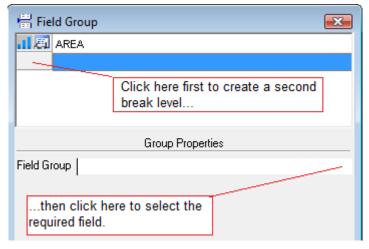
Properties							
Section : Details							
4 General Form	4 General Format Data All						
Form Feed	No						
New Row or Column	No						
Insecable Block	Yes						
Visible	No						

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

	demo_multicriteria	
Area Code Salesman Na	me Date An	ount
Sub-total for the Area ATLANTIC	\$1,321,2	63.31
Sub-total for the Area CENTRAL	\$1,450,0	37.95
Sub-total for the Area NORTH-WEST	\$2,517,5	69.66
Sub-total for the Area SOUTH	\$691,1	14.50
Sub-total for the Area WEST	\$5,786,4	63.92
Main Total:	\$11,766,4	49.35

1.8.3. Adding a second break level

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



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



Click&DECiDE

🖶 Field Group	🛱 Field Group								
▲【□□】 AREA									
I A SALNA	A A SALNAME								
	Group Properties								
Field Group	SALNAME								
Group Header	No								
Group Footer	Yes								
Sort Order	Ascending								
Group On	Group On Value								
Keep Together With First Detail									

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

💿 🖓 🌳 Report Header				
• • Page Header				
		demo_m	ulticriteria	
Area	Code Salesman	n Name	Date	Amount
💿 🖗 🗣 Group Header A	AREA			
='Salesmen for the	Area '+AREA			
🔍 🖓 🍁 Details				
AREA	SAL SALNAME		DATE	
Operation of the second sec	ALNAME			
='Sub-total for the S	Salesman ' <mark>+</mark> SALNAME			Sum(TØTAL)
🔍 🖓 🌳 Group Footer Al	REA			
='Sub-total for the A	Area :+ARE <mark>A</mark>			Sum(TØTAL)
💿 🖓 🌳 Page Footer				
='Printed on '+FormatDate	Time('dddd d of mmmm, yyyy	()+1 at []]]] []]	: 🍓 : : : : =	Copyright © Click & DECIDE
• • Report Footer			_	
Main Total:			1	Sum(TOTAL)

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

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

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





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

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

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

Properties								
Section : Group Header AREA								
4 General Format Data All								
Form Feed	No							
New Row or Column	No							
Insecable Block	Yes							
Visible	Yes							
Width	7.28"							
Height	0.2"							
Can Grow	Yes							
Can Shrink	No							
Repeat Section	Yes							

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





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

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

1.8.4. Sending a report with break to Excel

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

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

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

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

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

🔍 🔮 🗣 Report He	eader			^		
💿 🖗 돶 Page Hea	ider				4 Genera	I Format Data All
George Contraction of the Contra					Name	Text1
					Description	Area
			demo		Hyperlink	
					Bookmark	
Area	Code	Salesman n ame	Date	A	Highlight	
🍳 🖓 🍕 Group He	ader ABEA			-		
='Salesmen for	the area	AREA			Give the "	'Area"
🔍 🖓 🍕 Details						n to all fields
AREA	SAL	SALNAME		ATE	that need	to be in the
🔍 🖓 🌳 Group Fo	oter SALNA	AE /			same Exc	cel sheet
='Sub-Total for	the sales	sman '+SALNAME		5	column	
🔍 🖓 🍕 Group For	oter AREA					
='Sub-Total for	the area	+AREA		5		
🍳 🖓 🌳 Page Foo	ter					
='Printed on '+Form	atDateTime('	dddd d of mmmm, yyyy')+' at			
🔍 🖓 🗣 Report Fo	oter					
Main total:						

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

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• • Page Head	lor					4 Genera	I Format Data All		
• • • • • • • • • • • • • • • • • • •						Name	_SALNAME		
						Description	Salesman Name		
			demo	m	1	Hyperlink			
						Bookmark			
Area	Code	Salesman name	Date	A		Highlight			
💿 🖓 🌳 Group Hea	der AREA			/		Give the "S	Salesman Name"		
='Salesmen for	the area	'+AREA				description to all fields that nee			
🔍 💡 🌳 🛛 Details			_ /			to be on th column	e same Excel sheet		
AREA	SALĮ	SALNAME	ý (DATE		column			
🔍 🖓 🌳 Group Fool	ter SALNAN	1E	/						
='Sub-Total for	the sales	man '+SALNAME /		۶.					
🔍 🖓 🌳 Group Fool	ter AREA								

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

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

1 2 3 4		А	В	С	D	E
	1	Area	Code	Salesman Name	Date	Amount
+	238	Main Total:				\$30,322,200.00
	239					

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

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

1	2 3 4		А	В	С	D	E
		1	Area	Code	Salesman Name	Date	Amount
ſ	•	2	ATLANTIC				
	+	36	Sub-total for th	ne area	ATLANTIC		\$3,624,900.00
	•	37	CENTRAL				
	+	110	Sub-total for th	ne area	CENTRAL		\$10,590,800.00
	•	111	NORTH-WEST	Г			
	+	150	Sub-total for th	ne area	NORTH-WEST		\$5,119,970.00
	•	151	SOUTH				
	+	204	Sub-total for th	ne area	SOUTH		\$7,305,670.00
	•	205	WEST				
	+	237	Sub-total for th	ne area	WEST		\$3,680,890.00
Ē	-	238	Main Total:				\$30,322,200.00

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





1	2 3 4		А	В	C	D	E
			Area	Code	Salesman Name	Date	Amount
Γ	•	2	ATLANTIC				
	+	17			Sub-total for the salesman Diane Meyer		\$1,736,300.00
T	+	23			Sub-total for the salesman Karen Walker		\$576,214.00
	+	35			Sub-total for the salesman Tim Rosenberg		\$1,312,380.00
	_	36	Sub-total for the	ne area	ATLANTIC		\$3,624,900.00
T	•	37	CENTRAL				
T	+	69			Sub-total for the salesman James Smith		\$5,021,310.00
T	+	86			Sub-total for the salesman John Brown		\$2,908,250.00
T	+	99			Sub-total for the salesman Kathy Sanders		\$1,268,590.00
	+	109			Sub-total for the salesman Sanders Wanda		\$1,392,670.00
	Ē.	110	Sub-total for the	ne area	CENTRAL		\$10,590,800.00

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

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

1.9. Adding a Graph

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

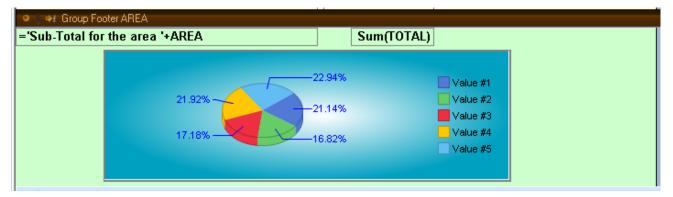
1. To do so, enlarge vertically the Group Footer AREA Block and click on the Chart icon in the Toolbox, then define the target location of the graph in the Group Footer AREA:



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



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

Properties Graph : Graph		×
4 General Forma	t Data All	Þ
Data Source	<report data=""></report>	
Series	FGrp_SALNAME_Text	
Data	FGrp_SALNAME_Sum_TOTAL	
First Records	×	
Other Records Series		
Series in rows	No	
Reverse Data Order	No	

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

- 4. Specify the Series and Data fields. In this example the Series will be the FGrp_SALNAME_Text field taken in the Group Footer Block for the SALNAME break level and the data will be the SUM(TOTAL) field taken from the Salesman Break Level. As you can see in the above picture the internal name of this field has been created automatically as "FGrp_SALNAME_Sum_TOTAL". Of course you can rename this internal name if needed.
- 5. Run the report and you will get a Pie Chart on each Area break level, displaying the Salesman belonging to the same area.





	28.47% 65.58%		Diane Meyer Karen Walker
Sub-total for the Ar	ea ATLANTIC		\$1,321,263.31
Sub-total for the Sa	lesman Tim Rosenberg		\$78,634.00
ATLANTIC	18 Tim Rosenberg	10/13/2015	\$78,634.00
Sub-total for the Sa	lesman Karen Walker		\$376,172.84
ATLANTIC	12 Karen Walker	9/13/2015	\$217,865.85
ATLANTIC	12 Karen Walker	3/22/2015	\$70,213.25
ATLANTIC	12 Karen Walker	2/6/2015	\$88,093.74
Sub-total for the Sa	lesman Diane Meyer		\$866,456.47
ATLANTIC	4 Diane Meyer	10/13/2015	\$67,712.00
ATLANTIC	4 Diane Meyer	9/13/2015	\$200,328.20

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

Properties Graph : Graph		×
4 General Form	nat Data All	⊳
Data Source	demo_multicriteria_salesman_sum	
Series	SALNAME	
Data	Sum_TOTAL	
Series in rows	No	
Reverse Data Order	No	
Child Data Link		
Parent Data Link		

In the above picture the Series is the SALNAME field and the Data is the Sum_TOTAL field from the query named "demo multicriteria salesman sum". This query, run separately, will give for example this result:





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

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

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

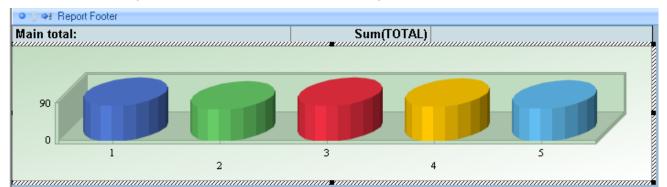
Properties	
Graph : Graph	
4 General Form	at Data All
Data Source	demo_multicriteria_salesman_sum
Series	SALNAME
Data	Sum_TOTAL
Series in rows	No
Reverse Data Order	No
Child Data Link	AREA
Parent Data Link	AREA

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

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

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

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



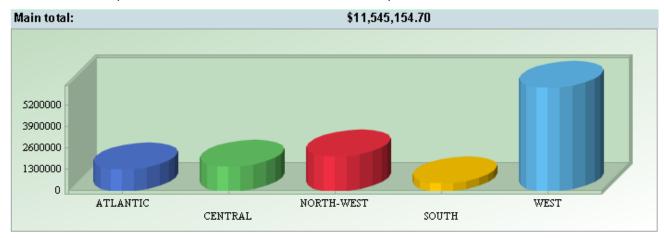
And the Property Data Tab as follow:





Properties Graph : Graph1		×
	t Data All	⊳
Data Source	<report data=""></report>	
Series	AREA	
Data	FGrp_AREA_Sum_TOTAL	
First Records	×	
Other Records Series		
Series in rows	No	
Reverse Data Order	No	

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



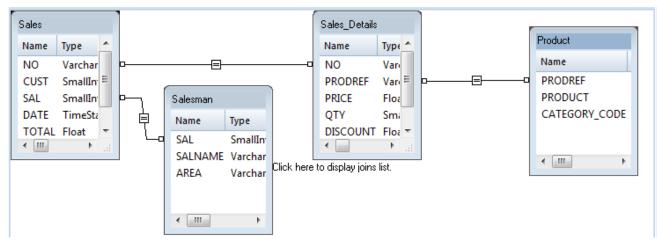
2. Run the report and the last block should be as this example:

1.10. Adding a Sub-Report

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

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

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



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

- 🔍 💵 60	Name	Туре	Length	Scale	Description
Formula					
	Amount	Float	20	2	2 (Sales_Details.QTY*Sales_Details.PRICE)*(1-Sales_Details.DISCOUNT)
V	SUM(Amount)	Float	15	2	2
Sales					
	NO	Varchar	5	0)
	CUST	SmallInt	2	0)
	SAL	SmallInt	2	0)
	DATE	TimeStamp	8	3	}
	TOTAL	Float	8	0)
Salesman					
	SAL	SmallInt	2	0)
<i>-</i>	SALNAME	Varchar	15	0)
	AREA	Varchar	10	0)
Sales_Details					
	NO	Varchar	5	0)
	PRODREF	Varchar	5	0)
	PRICE	Float	8	0)
	QTY	SmallInt	2	0)
	DISCOUNT	Float	8	0)
V	SUM(QTY)	Float	15	0) Sum_QTY
Product					
	PRODREF	Varchar	5	0) .
	PRODUCT	Varchar	25	0	
	CATEGORY_CODE	Integer	4	0	1 13
Sales	man name	PRODUCT	Quantity	Am	ount

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

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

		 3 • • • 1 • •	• 4 • • • 1 • • • 5 •	
	● ♥ ♥! Report Header			
	● 🖓 🍽 Page Header			
	PRODUCT	Quantity	Ar	nount
	● ♀ ⇔r Details			
•	PRODUCT	Sum_QTY	Sum_A	mount
	• • Page Footer			
	● ♥ ●! Report Footer			

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

● ♥ ♥! Report Footer		
='Products sold by '+SALNAME	Sum(Sum_QTY) Sum(Sum_Amount)	

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





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Properties Data or Formula :	_Sum_Amount_Total	×
4 General For	rmat Data All	⊳
Name	_Sum_Amount_Total	
Data Source	Sum_Amount	
Aggregate	Sum	-

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

PROPUST	0		
PRODUCT	Quantity	Amount	
2009 RED ZONE	51	\$78,633.50	
BMX ADULT RACER	55	\$43,780.00	
BMX URBAN LEAGUE	49	\$110,250.00	
DELTA HORSE DUAL	5	\$5,525.00	
MONGOOSE MOUNTAIN CRUISE	38	\$71,739.73	
NINE ALLIANCE RACER	152	\$306,850.00	
NIVRE SPECIAL EDITION	44	\$35,805.00	
SHOREWOODS WOMENS	16	\$13,536.00	
Products sold by John Brown	410	\$666,119.22	

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

💿 🖗 📲 Group Foote	r SALNAME		
SALNAME		Sum(TOTAL)	
			- 9
,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		11 /

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

Properties										
Sub Report : Report										
ormat Data All	⊳									
demo_multicriteria_product										
SALNAME										
SALNAME										
	ormat Data All demo_multicriteria_product SALNAME									

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

Border Style	Transparent
Border Color	&H0000000&
Border Weight	1 pt
Display	All Blocks

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



Can Grow	Yes
Can Shrink	No

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

		demo_multic	riteria	
Area (Code Salesman name	Date	Amount	
Salesman for the	Area CENTRAL			Main Report
CENTRAL	5 James Smith	11/21/2015	\$136,782.00	
CENTRAL	5 James Smith	11/22/2015	\$123,932.00	
James Smith			\$260,714.00	
PRODUCT		Quantity	Amount	Λ
2009 RED ZONE		82	\$98,092.50	
BMX ADULT RAC	ER	36	\$28,656.00	
BMX URBAN LEA	AGUE	32	\$72,000.00	Sub Report
NIVRE SPECIAL	EDITION	42	\$29,295.00	
SCHWINN EXCU	RSION RACER	22	\$32,670.00	
Products sold by	James Smith	214	\$260,713.50	
CENTRAL	9 John Brown	1/10/2015	\$223,333.00	Ж
CENTRAL	9 John Brown	1/26/2015	\$230,236.00	
CENTRAL	9 John Brown	1/26/2015	\$212,550.00	Main Report
John Brown			\$666,119.00	
PRODUCT		Quantity	Amount	*
2009 RED ZONE		51	\$78,633.50	
BMX ADULT RAC	ER	55	\$43,780.00	
BMX URBAN LEA	AGUE	49	\$110,250.00	
DELTA HORSE D	UAL	5	\$5,525.00	
MONGOOSE MO	UNTAIN CRUISE	38	\$71,739.73	Sub Report
NINE ALLIANCE	RACER	152	\$306,850.00	
NIVRE SPECIAL	EDITION	44	\$35,805.00	
SHOREWOODS	WOMENS	16	\$13,536.00	
Products sold by	John Brown	410	\$666,119.22	
CENTRAL	17 Sanders Wanda	1/10/2015	\$208,749.00	1
CENTRAL	17 Sanders Wanda	12/21/2015	\$167,582.00	Main Report
CENTRAL	17 Sanders Wanda	12/23/2015	\$181,089.00	Main Report
Sanders Wanda			\$557,420.00	L I

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

1.11. Adding a Cross-table

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

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

This query should look like:



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🔲 Click an	l Decide Web Dem	nonstration.wfv 📑 demo_m	ulticriteria_area_	customer		
🔍 🖬 🖉	lo ^r Name	Туре	Length	Scale	•	
🗆 Sales						
	NO	Varchar	5	0		
	CUST	Smallint	2	0		
	SAL	Smallint	2	0		
	🖌 DATE	TimeStamp	8	3		
	🖌 TOTAL	Float	8	0		
🗆 Salesman						
	🖌 SAL	Smallint	2	0		
	🖌 SALNAME	Varchar	15	0		
<u>??</u> — <u>., </u> —	🖌 AREA	Varchar	10	0		
Customer						
	CUST	Smallint	2	0		
	CUSTNAME	Varchar	30	0		
	ADDRESS	Varchar	50	0		
	Area Coo	de 👘 Salesman Name	Custo	omer	Date	Amount
1 ATLA	ITIC	4 Diane Meyer	Sunny Bikes	:	1/5/2015	\$73,605.00
2 ATLA	ITIC	4 Diane Meyer	Family Bikes		2/6/2015	\$76,953.18

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

Cross-Table Assistant - Step 3 of 3		×
	Build your dynamic cross-table by mo right window to the left areas Columr Several fields can be moved into each	ns, Rows and Data.
Rows Year CUSTNAME	Columns SALNAME Data Sum TOTAL	AREA CUSTNAME DATE SALNAME TOTAL Year
	Next > Finish	Cancel Help

And the result should looks like:

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





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

0			\$	į	G	ro	up	F	00	te	r S	ŝA	L١	٩A	M	E																																							
=!	S	u	b	-t	01	ta	I . 1	fo	Г	th	e	S	al	e	sr	na	an	•	+S	A	LI	N/	1	ЛE									Ş	SΑ	Ļ	N/	۹Ņ	ИE										Su	Im	ı(T	¢	ΤA	L)	}	
0			\$	į	G	ro	up	F	00	te	r A	R	ΕA	1																					'																				
=!																																																				TA]	
li																	οm										Ĩ								Ĩ								Ĩ								Ĩ			7	:
		•	:			:	:	:						:	:	:	:		:				:	:	:	:		:	:	:	:	:	:	:		:	:	:	:	1	:	:		÷	÷	1	:	1	:	:		1	:	ļ	•
		•	•	•		•	·	•					•	•	·	•	•		•			•	·	·	·	·		•	•	•	·	·	·	·		·	•	•	•	•	•	·		÷	·	•	•	•	•	·		·	•	l.	•
22		'n		ui.	//.	in,	in.	in	2	ui.				'n	iii	in	in	2	ui.	ui		·	in	in.	in.	iii	n f	ui.	a i	 im.	'n	'n	in	in	ų	iii	in	ui.	ui.	un	u'n	iii	n f	in.	in.	in.	in	in	in	in	dγi	in.	im	í.	
-			4	:	Pa	яg	e	-0	ot	er																																													

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

Properties		џх
Cross Table : Pivot		
4 General Form	nat Data All	Þ
Data Source	Cross-Table by Area and customer	
Child Data Link	AREA	
Parent Data Link	AREA	
Refresh Data	Yes	
Apply defined levels	Yes	

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

Area	Code Salesman Name	Date	Amount	
Salesmen for the A	rea ATLANTIC			
ATLANTIC	4 Diane Meyer	1/5/2015	\$73,605.00	
ATLANTIC	4 Diane Meyer	2/6/2015	\$76,953.18	
ATLANTIC	4 Diane Meyer	3/16/2015	\$79,194.50	
ATLANTIC	4 Diane Meyer	3/22/2015	\$58,776.00	
ATLANTIC	4 Diane Meyer	6/10/2015	\$231,969.40	
ATLANTIC	4 Diane Meyer	8/12/2015	\$77,918.20	
ATLANTIC	4 Diane Meyer	9/13/2015	\$200,328.20	
ATLANTIC	4 Diane Meyer	10/13/2015	\$67,712.00	
Sub-total for the Sa	alesman Diane Meyer		\$866,456.47	
ATLANTIC	12 Karen Walker	2/6/2015	\$88,093.74	
ATLANTIC	12 Karen Walker	3/22/2015	\$70,213.25	
ATLANTIC	12 Karen Walker	9/13/2015	\$217,865.85	
Sub-total for the Sa	alesman Karen Walker		\$376,172.84	
ATLANTIC	18 Tim Rosenberg	10/13/2015	\$78,634.00	
Sub-total for the Sa	alesman Tim Rosenberg		\$78,634.00	
Sub-total for the A	rea ATLANTIC		\$1,321,263.31	
	Diane Meyer Karen V	Valker Tim Rosenberg		
2015 Atlantic Moun	i <mark>tains Bikes</mark> \$376,1	72.84 \$78,634.00		
Family Bikes	\$403,769.38			
Sunny Bikes	\$462,687.10			

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



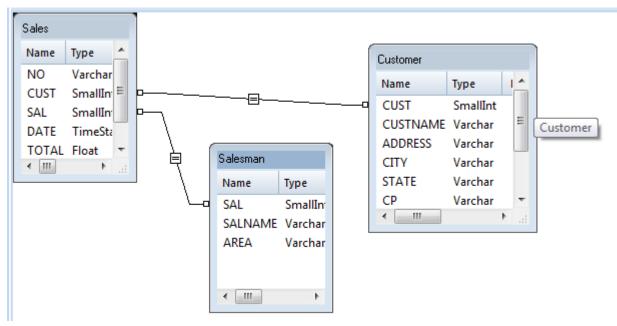
1.12. Adding a Query Data

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

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

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

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



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

🔍 👥 60	Name	Type L	Length	Scale	Description
🗆 Sales					
	Varc	ar	5	0	
	Smal	nt	2	0	
SAL	Smal	nt	2	0	
DATE	Time	itamp	8	3	
TOTAL	Float		8	0	
😑 Salesman					
SAL	Smal	nt	2	0	
SALNAME	Varc		15	0	
AREA	Varc	ar	10	0	
Customer					
CUST	Smal	nt	2	0	
CUSTNAME	Varc	ar	30	0	
ADDRESS	Varc		30	0	
	Varc		15	0	
STATE	Varc		5	0	
CP	Varc		10	0	
COUNTRY	Varc		15	0	
PHONE	Varc	ar	15	0	
CUSTNAME	Area				

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

Customer			
	Г	Sn	nallint
		Critoria	rchar
ADD		_	irchar
		-	irchar robar
		<u>seieu</u>	irchar irchar
		Group	rchar
PHO	-	Aggregate	rchar
CUSTNAM		Distinct Aggregate 🔶	Distinct Aggregate:
		<u>C</u> ount(*)	Count
		<u>P</u> roperties	

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

🗆 Salesman				
	SAL	Smallint		
	SALNAME	Varchar		
?? /	AREA	Varchar		
Customer				
	CUST	SmallInt		
	CUSTNAME	Varchar		
	ADDRESS	Varchar		
	CITY	Varchar		
	LATITUDE	Pack		
	LONGITUDE	Pack		
	STATE	Varchar		
	CP	Varchar		
	COUNTRY	Varchar		
	FULL_ADDRESS	Varchar		
	WEB	Varchar		
	PHONE	Varchar		
	COUNT(DISTINCT CUST	NAME) Float		
Count	Distinct_CUSTNAME	AREA		
1		ATLANTIC		
2	4	CENTRAL		
3	5	NORTH-WEST		
4	3	SOUTH		
5	7	WEST		

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

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





• • • Group Footer AREA			
='Sub-total for the Area '+AREA	 	Sum(T\$TAL)	
Cross-Table by Area and customer	 	Distinct customers 🧯 🗌 🗌	•••
· · · · · · · · · · · · · · · · · · ·	 	tuuuuuutta	

9. Now add a Query/Data object near the Label "Distinct Customers" in the Group Footer AREA Block. To do so, click on the ab! <u>Query Data</u> icon in the Toolbox, then define the target location of the query data object in the Group Footer AREA, on the right of the Label previously added. Apply a light

background color and click the 🗏 Center icon to get the result centered:

💿 🖓 🍁 Group Footer ARE	д		
='Sub-total for the Ar	ea :+ARE A	 	Sum(TOTAL)
Cross-Table,by Area ar	nd customer	 	Distinct customers: 🏚
		 	· · · · · · · · · · · · · · · · · · ·

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

Properties			×
Query Data : Query			
4 General Form	nat Data All		Þ
Data Source	demo_multicriteria_custome	er	
Child Data Link	AREA		
Parent Data Link	AREA	•	
Update Mode	Optimized		
Assign to parameter			

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

Sub-total for the Area CENTRAL		\$1,450,037.95		
		James Smith John Brown Wanda Sanders	Distinct customers:	4
	Bikes for Tykes	\$226,123.30		
	Gómez and Rodríguès;	\$275,481.00		
	Three Mountains; Cycles	\$70,754.50		
	Triathlon	\$877,679.15		

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

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

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

Giving in fact only one row:

	Count_Distinct_CUSTNAME	Area
1	4	CENTRAL

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

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

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2. Defining Alerts

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

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

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

Options			
General (Query Cube E	vent Manager License	
	Configuration		
	IP Address:	127.0.0.1	
	Port:	12345	
	Shared Secret:	•••••	Test
	Send events to	the Event Manager	

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

Click and [DECiDE Builder	×
?	The new configuration will not take effect until you stop and restart the Click and DECiDE LEO Service. Do you want to restart the Quick & Define LEO Service now?	
	Yes <u>N</u> o Cancel	

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

Click and [DECiDE Builder	×
	General Exception, Error inside CDIgOptionsNetReport::TestNRComClientConnection(), Error code : -2147352567, Error Code = 80020009 Code meaning = Exception occurred. Source = D7ComAgentClient.NRCOMClient.1 Description = clSocketException: Socket Exception, Error inside clSocket::Connect(), using connect(), Error code : 10061 -	
	ОК	

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

2.1. Alert Types

Click&DECiDE Builder provides 5 alert types:

2.1.1. **Run a Click and DECiDE Item**

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

2.1.2. Send an e-Mail

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

Run/e-Mail Click and DECiDE Item 2.1.3.

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

2.1.4. **Export Google Doc**

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

2.1.5. **Roambi Reporting Services**

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

2.1.6. Generate a RSS Feed

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

2.1.7. **Generate a Highlight**

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

Generate Information 2.1.8.

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

2.2. Create an alert

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

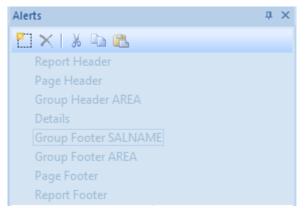
2.2.1. Alert running a Click&DECiDE item

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

Group Footer SALNAME	
Items Alerts	₹.
Ready	



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



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

Alerts	μ×
🔁 🗙 👗 🖻 🛍	
Report Header	
Page Header	
Group Header AREA	
Details	
Group Footer SALNAME	
	<define condition="" here="" your=""></define>
Туре	<define alert="" here="" type="" your=""></define>
Description	Run Click and Decide Item
Group Footer AREA	Run/e-mail Click and Decide Item
Page Footer	e-mail Export Google Doc
Report Footer	Roambi Reporting Sevices
	Highlight
	Information
	RSS Feed

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

Group Footer SALNAME	
Run Click and Decide Item	<define condition="" here="" your=""></define>
Туре	Run Click and Decide Item
Description	

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

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



Click&DECIDE Business Application Intelligence | Training

Im Quick Expression	- • •
Fields f_{∞} Functions 2 Parameters	
Fields :	
SALNAME	
TOTAL FGrp_AREA_Sum_TOTAL	
FGrp_SALNAME_Sum_TOTAL	
FGrp_SALNAME_Text	
Description :	
Amount	
FGrp_SALNAME_Sum_TOTAL < 300000	
Next Variable. () + · x /	
ОК	Cancel

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

Group Footer SALNAME	
Run the Report Demo_multicriteria	FGrp_SALNAME_Sum_TOTAL < 300000
Туре	Run Click and Decide Item
Description	Run the Report Demo_multicriteria

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

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

(Ξ	Run Click and Decide Item	Properties
		Project Name	C:\Users\Public\Documents\Click and DECiDE Samples\Web Portal\Click and Decide Web Demonstration.wfv

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

Project Name	C:\Users\Public\Documents\Click and DECiDE Samples'
Item Type	Report
Item Name	Query
Output Format	Report
Destination File	Cross-table

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





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

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

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

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

Project Name	C:\Users\Public\Documents\Click and DECiDE Samples\Web Portal\Click and Decide Web Demonstration.wfv
Item Type	Report Enter an equal sign here before cliking the Browse button
Item Name	Demo_Multicriteria to open the Quick Expression Editor if you wish to enter a
Output Format	PDF formula
Destination File	

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

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

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

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

Suffix	None	· · · · · ·
Click and DECiDE User	None	
Click and DECiDE Password	YY	
Parameters	YY-1 YYMM	
o Footer AREA	YYMM-1	
Footer	YYMM-1D	
rt Footer	YYMMDD	
	YYMMDD-1 NNNN	

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

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

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

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

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

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

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

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

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



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

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

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

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

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

Parameters	AREA_PARAM=IGNORE;SALNAME_PARAM=IGNORE;P_DATE=IGNORE IGNORE
AREA_PARAM	IGNORE
SALNAME_PARAM	IGNORE
P_DATE	IGNORE/IGNORE

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

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

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

Parameters		- • •
Area?	IGNORE	ок
Salesman Name:	IGNORE	Cancel
✓ Date? (Use key words or a calendar date) This Quarter	

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

M Click& DECIDE

Documents library

Shared Folder

Arrang	ie bv:	Folder 🔻

Sharea Folder			
Name	Date modified	Туре	Size
🐌 Alert Result	3/11/2015 12:23 PM	File folder	
🐌 Brochures	1/7/2015 9:37 AM	File folder	
📙 Click and Decide Web Demonstration	3/9/2015 4:06 PM	File folder	
📙 Network Security Intelligence	1/7/2015 9:37 AM	File folder	
🔁 DemoMultiCriteria_Bill Raley_0000.pdf	3/12/2015 9:28 AM	Adobe Acrobat D	57 KB
🔀 DemoMultiCriteria_Diane Meyer_0000.pdf	3/12/2015 9:28 AM	Adobe Acrobat D	56 KE
🔀 DemoMultiCriteria_Doug Castro_0000.pdf	3/12/2015 9:28 AM	Adobe Acrobat D	56 KE
🔀 DemoMultiCriteria_James Smith_0000.pdf	3/12/2015 9:28 AM	Adobe Acrobat D	56 KE
🔀 DemoMultiCriteria_Jim Baxter_0000.pdf	3/12/2015 9:28 AM	Adobe Acrobat D	56 KE
🔁 DemoMultiCriteria_Joe Kramer_0000.pdf	3/12/2015 9:28 AM	Adobe Acrobat D	57 KE
🔁 DemoMultiCriteria_Karen Walker_0000.pdf	3/12/2015 9:28 AM	Adobe Acrobat D	56 KE
🔁 DemoMultiCriteria_Kim Johnson_0000.pdf	3/12/2015 9:28 AM	Adobe Acrobat D	56 KE
🔁 DemoMultiCriteria_Robert Salta_0000.pdf	3/12/2015 9:28 AM	Adobe Acrobat D	56 KE

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

all la	Report Demo Multi Crit	eria with 3 Break Levels	41 M M
Area 📊	Code Salesman name 📶	Date 📶	Amount
NORTH-WEST			
NORTH-WEST	1 Bill Raley		
		1/4/2015	\$94,029.60
		2015	\$94,029.60
	Bill Raley		\$94,029.60
NORTH-WEST			\$94,029.60
General total: Generated Report File: DemoM Report Name used: Demo_Mut			\$94,029.60
	me used: C:\Users\Public\Documents\Click and DECIDE Sample	s/Web Portal/Click and Decide Web Demonstration.wfv	
Project Name used: Click and D	ecide Web Demonstration.wfv		
Path Name of the project file: C	Users/Public/Documents/Click and DECIDE Samples/Web Por	tal	
This Demoklutt Orthoga, Dill Dal	ey_0000.pdf report has been generated using the report Demo_ unity	Multicriteria from the C:\Users\Public\Documents\Click and DECIDE Sa	mples/Web Portal/Click

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

2.2.2. Alert sending an e-Mail

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

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

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

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





Alerts 🛛 🗘 🗙	Click and Decide Web Demonstration.wfv P Demo_Multicriteria
🛅 🗙 🐰 🖻 🛍	
Report Header	
Page Header	• • • AREA • • • • • • • • • • • • • • • • • • •
Group Header AREA	● ⑦ ♥! Page Footer
Group Header SALNAME	
Details	
Group Footer DATE	
Group Footer SALNAME	
Group Footer AREA	=If(IsDefined(AREA_PARAM),'Area(s): '+ParamAsString('AREA_PARAM ')+' .',')+If(sDefined(SALNAME_PAR
	• • Printed on '+FormatDateTime("date, long')+' at '+FormatDateTime("hh:mm) • • • • • • • • • = 'Pag
Page Footer	Part Report Footer
Report Footer	
	 : : ='General total:' : :::::: :::::: :::::: :::::: :::::
	■ Converse d Report File: "+FileName()"
	=Report Name used: '+ReportName()
	= Full Path Name and Project Name used: '+ProjectName(")
	1 = "Project Name used. '+ Projectilyame("Name") . .
	= "Bath Name of the project file: +ProjectName("Path")
	📋 📜 🗄 =This '+Filename()+' report has been generated using the report '+ReportName()+' from the '+ProjectName(')

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

Alerts			џ	×
🛅 🗙 🐰 🖻 🛍 👘				
Report Header				
Page Header				
Details				
Page Footer				
Report Footer				
		Add Alert		
	\times	<u>R</u> emove Alert		
	Ж	Cut		
	Đ	С <u>о</u> ру		
		<u>P</u> aste		
	_			

3. Select e-mail for the Alert Type.

Report Footer	
😑 e-mail	<define condition="" here="" your=""></define>
Туре	e-mail 🔹
Description	Run Click and Decide Item
e-mail Properties	Run/e-mail Click and Decide Item
From	e-mail Export Google Doc
То	Roambi Reporting Sevices
Subject	Highlight
Text	Information
Attachment	RSS Feed

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

Report Footer		
😑 e-mail	_Sum_Total_Amount < 100000	
Туре	e-mail	



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

E Re		port Footer		
		Send by e-Mail if Main Total lower than 1000	_Sum_Total_Amount < 100000	
		Туре	e-mail	
		Description	Send by e-Mail if Main Total lower than 100000	

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

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

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

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

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

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

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

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

- 10. Save and close the report demo_multicriteria.
- 11. Run now the report Report Training for the period Q1 2015 for example.

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



MCLick&DECIDE Business Application Intelligence | Training

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

12. Check your e-mail box

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

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

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

🛃 🤊 ଓ 🔺 🗇 🛕 🚑 🚑 ᄎ 🎦 🗧			
From:	societe@clickndecide.com	Sent: jeu	
To:	didier@clickndecide.com		
Cc:			
Subject:	Alert: the products sold by the salesman Kim Johnson are lower than 100000 Euros		
🖂 Message	e 🔁 DemoMultiCriteria_Kim Johnson_0000.pdf (54 KB)		

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

13. Open any PDF file to see detailed information:

Area 📲	Code Salesman name 💵	Date 📲	Amount
SOUTH			
SOUTH	16 Kim Johnson		
		25/03/2015	\$42 375,00
		2015	\$42 375,00
	Kim Johnson		\$42 375,00
SOUTH			\$42 375,00
General total: Generated Report File: De Report Name used: Demo	moMultiCriteria_Kim Johnson_0000.pdf Multicriteria		\$42 375,00
	t Name used: C:\Program Files (x86)\Click and DECiDE\BAI\Demo\	leb/Click and Decide Web Demonstration.wfv	
Project Name used: Click and Decide Web Demonstration.wfv Path Name of the project file: C:Program Files (x88)/Click and DECIDEIBAI/DemoWeb			
			This DemoMultiCriteria_Ki Decide Web Demonstratio



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2.2.3. Run/e-mail Click&DECiDE Item

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

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

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

How is defined this alert?

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

Alerts		
🛅 🗙 👗 🗈 🛍		
Report Header		
Page Header		
Details		
Run/e-mail Click and Decide Item	<define condition="" here="" your=""></define>	
Туре	Run/e-mail Click and Decide Item	
Description		

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

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

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

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

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

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

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

d DECiDE Password

Specify the parameters to be used

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

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



Specify the information required to send the e-Mail

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

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

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

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

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

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

💷 Parameters 💿 📼 💌
 Parameters Area? ATLANTIC;CENTRAL Salesman Name: Diane Meyer;James Smith Cancel Date? (Use key words or a calendar date) Last Year Send e-mail(s) ? Yes societe@clickndecide.cor

9. See the result



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

	diane.meyer@yopmail.com	
	diane.meyer@yopmail.ce	Check Inbox
•		

For Diane Meyer:

click "Check Inbox":





diane.meyer@yopmail.com				
Viane.meyer	Check for new ma	ails 'E-mail alias' for this inbox: alt.ro-2pe285j@yopmail.com (<u>what is email alias?</u>)		
Inbox	1 mail	🖹 Write 🛛 🙈 Forward 🖉 View 👌 🗶		
Select Solete Delete Nose Solete Sales for the vendor Diane		Sales for the vendor Diane Meyer from the Area ATLANTIC From: <societe@clickndecide.com> Date: 2015-03-16 11:12 Sales for Vendor Diane Meyer 0000.pdf (55 Ko) test</societe@clickndecide.com>		

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

Report Demo Multi Criteria with 3 Break Levels			
Area 📶	Code Salesman name II	Date III	Amount
ATLANTIC			
ATLANTIC	4 Diane Meyer		
	· · · · · · · · · · · · · · · · · · ·	2/21/2014	\$72,880.00
		2/27/2014	\$51,953.75
		3/11/2014	\$69,535.61
		5/15/2014	\$225,445.00
		7/17/2014	\$71,079.80
		9/16/2014	\$187,998.55
		10/18/2014	\$62,251.00
		12/10/2014	\$67,885.00
		2014	\$809,028.71
	Diane Meyer		\$809,028.71
ATLANTIC			\$809,028.71
General total: \$809,028.71 Generated Report File: Sales for Vendor Diane Meyer_0000.pdf			
Report Name used: Demo_Multicriteria Full Path Name and Project Name used: C/UsersiPublic/DocumentsiCilck and DECIDE SamplesiWeb Portal/Cilck and DECIDE Web Demonstration.wfv Project Name used: Cilck and DECIDE Web Demonstration.wfv			
			Path Name of the project file: C:/Usersi/Public/Documents/Click and DECIDE Samples/Web Portal
Pain Name of the project me. Clusters Plant Coccurrent actics: and Decide administrative Point This Sales for Vendor Diane Meyer_0000,cdl report has been generated using the report Demo_Multicriteria from the ClUsers/Public/Documents/Click and DECIDE Samples/Web Portal/Click and DECIDE Web Demonstration.why			

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

2.2.4. **E-Mail possible troubles**

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

-Mail Server (SM	TP)	
MailServerNa	me	[est]
User ID:		
Password:		

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

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





From	societe@clickndecide.com	
То	didier@clickndecide.com	
Subject	='Alert: the products sold by the salesman ' + SALNAME	
Text	='Please find attached a Report PDF file for the Salesma	
Attachment	Yes	

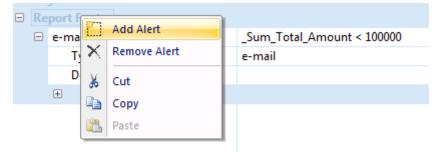
Consult if needed the Event Viewer.

2.2.5. Alert sending result to a Google Doc

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

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

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



4. Select Export Google Doc for the Alert Type:

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

Export Google Doc	_Sum_Total_Amount < 100000	
Туре	Export Google Doc	

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

Export to Google Doc if Amount lower than 10	_Sum_Total_Amount < 100000
Туре	Export Google Doc
Description	Export to Google Doc if Amount lower than 100000

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

Export Google Doc Properties	
Google User	democnd@clickndecide.eu
Google Password	******



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

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

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

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

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

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

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

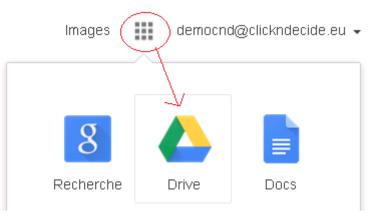
Image: Constraint of the second line of

Sign in with your Google Account

12. Select Drive through the Application icon:



Click&DECiDE



13. Select in My Drive the Public drive:

		~	٩
Drive	a Public		
CREATE My Drive My CnD Data	Try the new Drive. We've been working hard to create a clean, fast, fresh expension	erience for you	
Shared with Me	My Drive Public TITLE	OWNER 👻	LAST M 👻
Recent	🗌 🖕 📴 Robert Salta_2015-03-19 Shared	me	3:48 am me
Trash More -	🗌 👷 📴 Joe Kramer_2015-03-19 Shared	me	3:48 am me
Install Drive for your	🗌 🙀 🚥 Kim Johnson_2015-03-19 Shared	me	3:48 am me
computer	Doug Castro_2015-03-19 Shared	me	3:47 am me
	□ ☆ 🔤 Bill Raley_2015-03-19 Shared	me	3:47 am me
	🗌 🙀 🚥 Karen Walker_2015-03-19 Shared	me	3:47 am me
	Diane Meyer_2015-03-19 Shared	me	3:47 am me

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

2.2.6. Alert creating a RSS Feed record

In the paragraph 2.2.2 "<u>Alert sending an e-Mail</u>", the **demo_multicriteria** report was sending an e-Mail when the Alert was true, the Alert being the total amount for each Salesman lower than 100000.

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

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

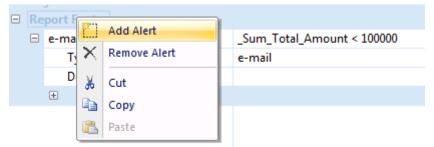
- 1. Open the report **demo_multicriteria**.
- 2. Click the Report Footer block and open the Alert Tab





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



4. Select RSS Feed for the Alert Type:

-	
	<define condition="" here="" your=""></define>
Туре	<define alert="" here="" type="" your=""></define>
Description	Run Click and Decide Item
	Run/e-mail Click and Decide Item e-mail Export Google Doc
	Roambi Reporting Sevices Highlight
	Information
	RSS Feed

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

RSS Feed	_Sum_Total_Amount < 100000
Туре	RSS Feed
Description	

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

RSS Feed is Total Amount lower than 100000	_Sum_Total_Amount < 100000
Туре	RSS Feed
Description	RSS Feed is Total Amount lower than 100000

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

RSS Feed Properties	
Title	= 'The '+ SALNAME +' amount is ' + STR(_Sum_Total_Amount , 6, 2) + ' €'

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

RSS Feed Properties	
Title	= 'The '+ SALNAME +' amount is ' + STR(_Sum_Total_Amount , 6, 2) + ' €'
Description	='This alert for the salesman ' + SALNAME + ' has been generated because the amount sold was lower than 100000 €'

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

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



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

='http://localhost/dvweb/Menus/Display.aspx? ma=BAI+Demonstration& mi=2317& rp='+FileName()

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

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

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

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

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

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

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

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

- 12. Save and close the demo_multicriteria report.
- 13. Export the **Report Training** report to PDF for the First Quarter 2015 for example.

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



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



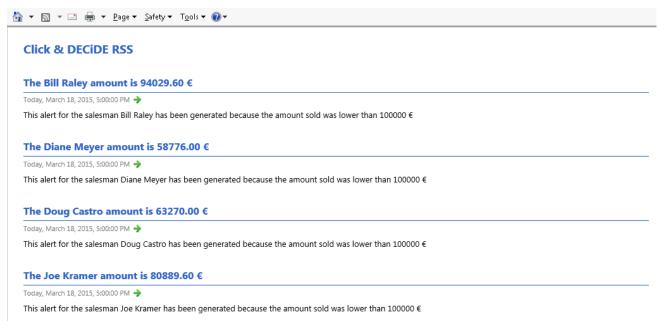
Click&DECiDE



To see how many new feeds are available:

S Click &	DECiDE RSS (new)	C
	Click & DECiDE RSS (7 new) Updated 1 minute ago	

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



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

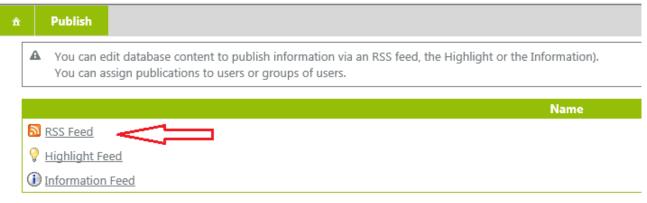
2.2.6.1. Checking if records have been added in the RSS Feed table

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

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







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

â	Publish	RSS Feed						[Administrat	tor] Lo
	#	Date	Category		Title	Description	URL	Groups	Users
	3	3/18/2015 4:00:00 PM	Warning	The Bill Raley a	mount is 94029.60 €	This alert for the salesman Bi	http://195.168.0.95/dvweb/Menu		
	3	3/18/2015 4:00:00 PM	Warning	The Diane Mey	er amount is 58776.00 €	This alert for the salesman Di	http://195.168.0.95/dvweb/Menu		
	3	3/18/2015 4:00:00 PM	Warning	The Doug Cast	ro amount is 63270.00 €	This alert for the salesman Do	http://195.168.0.95/dvweb/Menu		
	3	3/18/2015 4:00:00 PM	Warning	The Joe Krame	amount is 80889.60 €	This alert for the salesman Jo	http://195.168.0.95/dvweb/Menu		
	3	3/18/2015 4:00:00 PM	Warning	The Karen Wall	ter amount is 70213.25 €	This alert for the salesman Ka	http://195.168.0.95/dvweb/Menu		
	3	3/18/2015 4:00:00 PM	Warning	The Kim Johnso	on amount is 42375.00 €	This alert for the salesman Ki	http://195.168.0.95/dvweb/Menu		
	3	3/18/2015 4:00:00 PM	Warning	The Robert Sal	a amount is 44940.00 €	This alert for the salesman Ro	http://195.168.0.95/dvweb/Menu		
					Add an RSS feed to publish	Purge existing RSS feeds			

2.2.6.2. RSS Feed possible troubles:

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

2.2.7. Remove an Alert

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

2.2.8. Copy or Cut and Paste Alerts

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





3. Report Templates

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

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

3.1. Creating a Template

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

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

3.1.1. Creating a template from an empty report.

3.1.1.1. **Required Blocks**

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

Report Templates	× .
Templates: 👛 🐑 🕹 🗲	Preview (Double-click to enlarge)
Standard Customized	
Portrait A4 Blue Glass Header Extended Arial	NO A NO A 100 4 100 100 100 4 100 100 100 4 100 100 100 4 100 100 100 4 100 100 100 4 100 100 100 4 100 100 100 4 100 100 100 4 100 100
Portrait A4 Green Glass Header Extended Arial	Vice I Vice Vi

2. Select the Customized Tab

? Report Templates		
Templates:	🖱 🗣 🗙 🛧 🗲	Preview (Double-click to enlarge)
Standard Customized		

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

New Template Name	×
MyTemplate	OK Cancel

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

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

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

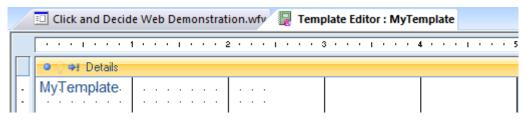
Warning: if the user has not authorized block widths and heights to grow then certain query fields may not be able to be automatically inserted in the report. The user will need to add them by hand.

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

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

? Report Templates		
Templates:	📉 🕒 🗙 🛧 🗲	Preview (Double-click to enlarge)
Standard Customized MyTemplate		
	Template Properties	
Name	MyTemplate	
Description	optional description	
Block Width can Grow	No	
Block Height can Grow	No	
Horizontal Field Spacing	0''	
Vertical Field Spacing	0''	
Image Preview		

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



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

TO TO OF Report Header			
MyTemplate			
🔍 🗘 🔿 Details			
🗢 🔿 💠 Report Footer			

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





🗢 🔿 🔿 Report Header	
MyTemplate	
🔍 🖓 🏟 Page Header	
🗢 🖓 🗣 Details	
Page Footer	
• • + Report Footer	

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

3.1.1.2. **Template Fields**

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

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

3.1.1.3. **Title Fields**

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

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

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

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



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🔍 🔶 Report Heade	r					
MyTemplate	Text	· 👝			í	
• • Page Header			Template Items	•		Title 1
		· 🐰	Cut Maj+	Suppr		Title 2
O etails	1	- ñ		Ctrl+C		First Header
				cuite		First Column
Page Footer		_	<u>A</u> lign	•		
			<u>S</u> ize	•	_	Static Format
			C <u>e</u> nter	•		
🔍 🗢 Report Footer			Horizontal Spacir	na 🕨		
		•		· 9		
			Vertical Spacing			
		1	Pr <u>o</u> perties			

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

Properties		×
Static Label : !]	litle1	
4 General	Format Data All	Þ
Name	!Title1	*
Text	Title 1	

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

🗢 🖓 🌳 Report He	ader		
MyTemplate	Title 1		
Page Hea	der		

3.1.1.4. First Header Field

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

- The **Block Width can Grow** option is activated: the report width will be increased to ensure that all the headers which follow will be positioned on the same row.
- The **Block Width can Grow** option is deactivated but the **Block Height can Grow** option is activated: the report height will be increased to ensure that all the headers which follow can be positioned on a new row.
- None of the above options is activated: the headers which follow will not be inserted in the report and will therefore be missed out.
- 1. Add now a static label field in the Page Header block and right-click this field:



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🔍 🔿 🗣 Report Hea	der								
MyTemplate	Title 1.								
🔹 🖓 🌳 Page Head	🗢 🔿 🌩 Page Header								
Text	2		Ļ						
• •! Details	<u>T</u> emplate Items	• 🗸	Title 1						
	K Cu <u>t</u> Maj+	Suppr	Title 2						
• • Page Foo		Ctrl+C	First Header						
			First Column						
• + Report Fo	Align		Static Format						
	Size	• • L	Static Format						

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

Properties		×
Static Label : !First	t_Header	
4 General Fo	ormat Data All	Þ
Name	!First_Header	
Text	First Header	

3.1.1.5. **First Column Field**

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

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

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

- The Block Width can Grow option is activated: the report width will be increased to ensure that all the columns which follow will be positioned on the same row.
- The Block Width can Grow option is deactivated but the Block Height can Grow option is activated: the report height will be increased to ensure that all the columns which follow can be positioned on a new row.
- None of the above options is activated: the columns which follow will not be inserted in the report and will therefore be missed out.
- 1. Add now a data or formula field in the Details block and right-click this field:





😐 🖓 🍁 Report He	ader	
MyTemplate	· · · Title 1. · · ·	
🔍 🌩 Page Hea	der	
First Header		
🔍 🗢 Details	-	
	2	
• • • Page	Template Items	✓ Title 1
	Cut Maj+Suppr	Title 2
• + Repo		First Header
		First Column
	Align •	
	Size •	String Format
	Center	Numeric Format
	-	Date Format
	Horizontal Spacing	
	Vertical Spacing	Time Format
	Pr <u>o</u> perties	Timestamp Format

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

Properties Data or Formula	: !First_Column	×
4 General F	ormat Data All	⊳
Name	!First_Column	
Data Source	First Column	
Aggregate	None	

3.1.1.6. Column Format Field

As mentioned in the previous paragraph **First Column Field**, the format of fields inserted in a report follows the priority of each corresponding column of the query.

However, if no specific format has been defined in the query, then the user can define default values to use when creating a report via a Template.

The user can add fields whose position is not important but whose format will be taken into account, if it is not defined in the query. These additional fields are optional.

These fields will remain invisible in the reports created using a Template and they are only used to indicate formats and other attributes to use (color, font, character size etc... when creating a report but also when adding additional columns to a report at a later date.

It may be necessary to add a static field (label), a dynamic field (data or formula) or a separator (line) to a report. They will be named as follows:

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





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

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

Field Search Rules

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

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

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

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

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

3.1.1.7. Additional Field Format

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

3.1.1.8. Dynamic Fields in the Details Block

For example, in the previous Template place a **Data/Formula** field in the **Details** block then right-click and select **String Format** from the list of items displayed.

Define the attributes for this alphanumeric field which does not have a specific format except that it is aligned to the left and define the size, font, font color and background you wish. Note the field's internal name will be !Format_Data:

🔍 🔶 🏟 Page Header			
First-Header	Properties	1 1	×
🔍 🗢 Details	Data or Formula : !!	Format_Data	
First Column	4 General Form	nat Data All	⊳
• • Page Footer	Name	!Format_Data	
	Data Source	String Format	
I I	Aggregate	None	
Report Footer	Assign to parameter		
	Cumul	None	
	Format		

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



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

• • Page Header First Header • •	Properties Data or Formula :	Format Num	×
• 🖓 🗣 Details		mat Data All	Þ
First Column String Format Numeric Format	Name	!Format_Num	
● ♥ Page Footer	Data Source	Numeric Format	
	Aggregate	None	
	Assign to parameter		
🖜 🖓 🏟 Report Footer	Cumul	None	
	Format	Currency	Ψ.

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

Define the attributes for this Date type field which should, for example, be aligned to the left, specify the size, font, font colour and background as well as the Date format to use (for example the format proposed by Windows or a customized format such as dddd dd mmmm yyyy). Note that the field's internal name will be !Format Date:

T● 🔆 🔃 Page Header	4 General For	nat Data All
First Header	Name	!Format_Date
TO C 41 Details	Data Source	Date Format
	Aggregate	None
First Column String Format Numeric Format Date Format	Assign to parameter	
TO 🖓 🗣 Page Footer	Cumul	None
	Format	Date, reduce

3.1.1.9. Static Fields in the Details Block

If a Text/Label type item is added to the Details block at a later date it is also possible to predefine default attributes. For example, to do so, place a Label type field in the Details block then right-click and select Static Format from the list of items displayed.

Define the attributes for this Static field which should, for example, be aligned to the left, specify the size, font, font color and background. There is no format to define for Static fields. Note that the field's internal name will be !Format Static

·● () ♦ Page Header			
First Header		Properties	
● 🖓 🏘 Details		Static Label : !Fo	ormat_Static
First Column String Format Numeric Format Date Format	Static Format		Format Data All
Company Page Footer	9	rtame	!Format_Static
	1 11	Text	Static Format
		Visible	Yes

Dynamic Fields in a Header Block 3.1.1.10.

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

Note that objects' internal names are duplicated and end with a number to avoid doubles. For example the !Format Num field will be copied as !Format Num2, the !Format DateTime field will be duplicated as !Format DateTime3 etc.

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ା ୁ ବଃ Report Header						Properties		
MyTemplate	MyTemplate Title 1					Data or Formula : !	Format_Date1	
				121 1		innin (4 General For	mat Data All
🔍 🗣 Page Hea	der						Name	!Format_Date1
First Header							Data Source	Date Format
·	<u> </u>						Aggregate	None
🔍 🗘 🗣 Details							Assign to parameter	
First Column	String Forma	t · · Numerio	Format	Date	Format	Static I	Cumul	None
• • Page Fool	er						Format	Date, long
	 						Visible	Yes

These keywords will be recognized by the software since they start with the reserved syntax !Format Data, !Format Num, !Format Date, !Format Time, !Format DateTime and !Format Static.

3.1.1.11. Static Format in Header Blocks

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

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

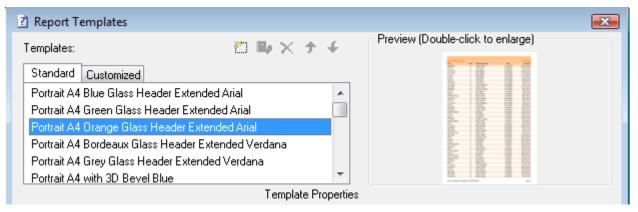
3.1.2. Creating a template from an existing template.

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

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

? Report Templates		
Templates:	□■×ナチ	Preview (Double-click to enlarge)
Standard Customized		
Portrait A4 Blue Glass Header Extended Ar	ial 🔺	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
Portrait A4 Green Glass Header Extended /	Arial 📃	

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



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

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New Template Name	×
Portrait A4 Blue Extended Calibri	OK Cancel

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

? Report Templates		EX
Templates:	🖺 🕒 🗙 🛧 🗲	Preview (Double-click to enlarge)
Standard Customized		
MyTemplate		
Portrait A4 Blue Extende	ed Calibri	
	Template Properties	~ ~ ~
Name	Portrait A4 Blue Extended Calibri	
Description	A4 Format. Blue, Fixed Width and Modifiable F	leight. Calibri Font
Block Width can Grow	No	
Block Height can Grow	Yes	
Horizontal Field Spacing	0''	
Vertical Field Spacing	0''	
Image Preview	%DATASET_DEM0%\Templates\Preview\Po	ortrait A4 Blue Extended Calibri.png

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

	•••••••••••••••••••••••••••••••••••••••	
	● ◇ ◆ Report Header	
	● 🖓 🌳 Page Header	
ŀ		
2	Title	
:	First_Header Format_Num Format_DateTim Format_Date Format_Time	
	● 🖓 🌩 Details	
ŀ	First_Column Sum Format_Num Format_DateTime Format_Date Format_Time .	Format_Static
	● ⑦ ♥! Page Footer	
:	='Printed on '+FormatDateTime('dddd d of mmmm, yyyy')+' at 🛛 🝓 ='Copyright © Click & DECiDE	: : :='Page :
	● ● ◆ Report Footer	

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

Click&DECiDE

🔍 🗘 🍕 Report He	eader
🔍 🗘 🌩 🕴 Page Hea	ader
<u> </u>	<i>Title</i>
First_Header	· · · · · · · · · · · · · · · · · · ·
🔍 🖓 🌳 Details	
First_Column	Sum(Format_Num Format_DateTime Format_Date Format_Time Format_Static
• • Page Foo	iter
- Reinted on U.Farmer	atDateTime('dddd d of mmmm, yyyy')+' at '+FormatDateTime('hh:mm AM/PM 🍓 ='Copyright © Bicycle & Co. ='Page
Printed on +Forma Printed on +Forma	

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

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

3.1.3. Creating a template from an existing report.

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

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

Report Templates		X
Templates:	🖄 🕒 🗙 🛧 🗲	Preview (Double-click to enlarge)
Standard Customized		
MyTemplate		
Portrait A4 Blue Extended Calibri		
	Template Properties	

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

New Template Name	
Invoices Grey and Black Time New Roman 12	OK Cancel

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





? Report Templates		
Templates:	🛅 🖦 🗙 🛧 🗲	Preview (Double-click to enlarge)
Standard Customized		
MyTemplate		
Portrait A4 Blue Extende	ed Calibri	
Invoices Grey and Black	< Time New Roman 12	
	Template Properties	
Name	Invoices Grey and Black Time New Roman 1	2
Description	Invoice template	
Block Width can Grow	No	
Block Height can Grow	Yes	
Horizontal Field Spacing	0''	
Vertical Field Spacing	0''	
Image Preview		

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

🔍 🖓 🔃 Report Header	
💿 🖓 🔿 Page Header	
Bike City	INVOICE
1234 Front St., San Disgo, CA - 92104 - USA	
● () ♥! Details	
PRODREF. PRODUCT QT	=DISC PRICE TOTAL PRICE
🔍 🗣 Page Footer	
='Printed on '+FormatDateTime('dddd d of mmmm,	€ = Copyright © Click & DECiDE
O I State Provide Action Content State Pro	

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





		NVOICE		
ſ		Template Items	-	Title 1
	*	Cu <u>t</u> Maj+Suppr		Title 2
		Copy Ctrl+C		First Header
				First Column
=DISC		Align		Static Format
		C <u>e</u> nter		
		Horizontal Spacing		
		Vertical Spacing		
	P	Pr <u>o</u> perties		

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

	Properties			
	Static Label : !Title1			
Title 1	4 General Format Data All			
	Name	!Title1		
	Text	Title 1		
	Visible	Yes		
1	Left	4.03''		
Top 0.31"				

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

TO ⊕ Page Header					
	Bike Ci 1234 From St. San D CA - 92104 VSA				
Text	Template Items	• 🗸 🕹	Fitle 1		
PRODREF.	Cu <u>t</u> Maj+Suppr	1	Title 2		
• 🖓 ቀ! Pagi 📴	<u>C</u> opy Ctrl+C	F	First Header		
='Printed on	Align		First Column		
• 🖓 ቀ ! Rep	Size	•	Static Format		

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





• • Page Header			
Bil	o City		
	Properties		×
1234 Fr CA - 92.	Static Label : !First	_Header	
· · · · · · · · · · · ·	4 General Fo	rmat Data All	⊳
First Header	Name	!First_Header	
	Text	First Header	
	Visible	Yes	

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

🔍 🗘 🔿 De					
PRODREE	PRODI	JCT			=DISC
	<u>T</u> emplate	Items 🔸	\checkmark	Title 1	ľ
='Print 👗	Cut	Maj+Suppr		Title 2	F
-7 000	Сору	Ctrl+C	\checkmark	First Header	
				First Column	
	Align	•			

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

Optimis				
PRODREF	RICE	2		
• 🖓 🗣 Page Footer		Template Items	$\overline{\mathbf{V}}$	Title 1
='Printed on '+FormatDateTime('ddd	*	Cu <u>t</u> Maj+Suppr		Title 2
• • • Report Footer		Copy Ctrl+C	\bigvee	First Header
				First Column
		Align		String Format
		<u>S</u> ize		Numeric Format
		Center 🕨		

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

3.2. Saving Templates

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

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

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





4. Report Book

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

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

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

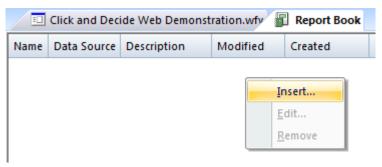
4.1. Create a Report Book

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

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

New Report	
	Blank Report Report from Query Report Book Report from Raw Cross Table Data
Data Source Item:	

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



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

Report		ОК
Name	<u>^</u> I A	Cancel
戻 Dashboard with report - Report		
🙀 Date Keyword Report		
🕎 Demo_Multicriteria		
🕎 Demo_Multicriteria - Cust		
🕎 Demo_Multicriteria_original		
🕎 Graph with series in rows		
🕞 Invoices	:	
🕎 Invoices Alert	:	
🕎 Invoices e-mail	:	
Reproducts by category	1	
Report-Brochures	-	

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

Click and Decide Web Demonstration.wfv Report*						
Name	Data Source	Description	Modified	Created		
厦 Date Keyword Report	Date Keyword Query	·	10/22/2012 5:35:30 PM	12/16/2008 3:12:52 PM		
🔙 Invoices	Invoices	Example printing invoices	10/19/2012 12:02:41 PM	10/08/1999 12:07:53 PM		
🕞 Products by category	Products by category	Example with 2 columns	10/19/2012 4:20:58 PM	02/21/2001 6:50:49 PM		

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

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

 File Edit	Viev	w Tools Window	Help	5	
 💕 🔒 🧭	v	Fusion Mode		1	
💷 Click a	V	Toolbar	on.v	vfv 📳 Report*	
Name	\checkmark	Status Bar		Description	Modified
🕎 Date Keyw		Application Look	ery		10/22/2012 5:35:30 PM
🔙 Invoices		Invoices	_	Example printing invoices	10/19/2012 12:02:41 PM
🕞 Products by	y cate	egory Products by categ	jory	Example with 2 columns	10/19/2012 4:20:58 PM

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

Report 1 generates 3 pages

Report 2 generates 5 pages

Report 3 generates 2 pages

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

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

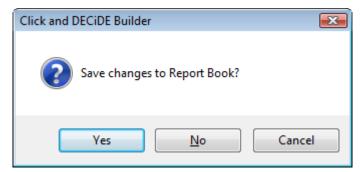
Report 1 generates 3 pages

Report 2 generates 5 pages

Report 3 generates 2 pages

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

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







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

Save As		×
Save 'Report	Book'	ОК
New Name:	My Report Book1	Cancel

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

🖳 Invoices	10/19/2012 12:02:41 PM	Invoices
🔙 🔤 Invoices Alert	08/19/2013 4:54:06 PM	Invoices Alert
🕎 Invoices e-mail	03/20/2014 10:09:04 AM	Invoices with alert parameter
🕼 My Report Book 1	03/18/2015 4:33:18 PM	
🕎 Products by category	10/19/2012 4:20:58 PM	Products by category
🖳 Report-Brochures	10/22/2012 3:24:07 PM	
🕎 Report training	03/18/2015 4:33:49 PM	Demo_Multicriteria
🔙 🖳 Report with Breaks	10/19/2012 3:01:26 PM	Query for the Report with Breaks

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

4.2. Modify a Report Book

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

4.2.1. **Remove a report from a Report Book**

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

4.2.2. Add a report in a Report Book

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

4.2.3. Edit a Report from a Report Book

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





Close and save the Report Book.

4.2.4. **Missing reports in a Report Book**

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

1. Click OK on this message



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

Click and Decide Web Demonstration.wfv* My Report Book 1							
Name	Data Source	Description	Modified	Created			
Date Keyword Report	Invoices	Example printing invoices	10/22/2012 5:35:30 PM 10/19/2012 12:02:41 PM	12/16/2008 3:12:52 PM 10/08/1999 12:07:53 PM			

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

4.3. Delete a Report Book

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

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

5. Report from Raw Data Cube

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

To know how to create such a Report, please see the Report User Guide made for Click&DECiDE Builder Version 13, 32-bit:

http://www.clickndecide.com/sites/default/files/assets/files/resources/clickndecide bai report user guide 0.p df





6. Report from Raw Cross Table Data

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

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

Click and D	ecide Web Demonstration.wfv		▼ X
	🔂 New 🚰 Open 🗙 Delete		
	Name	🛆 Modified	Data Source
	📅 Cross-Table Demo_Multicriteria	03/18/2015 4:50:55 PM	demo_multicriteria
7	😨 Cross-Table Demo_Multicriteria_for_Report	03/18/2015 4:52:19 PM	demo_multicriteria
Queries			
Reports			
Cross Tables			

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

(🖄 ! 🗶 🖬					
	Cross Table	Wizard ratio	n.wfy 📄 Cross	Table Demo_Mul	ticriteria_for_Repo	ort*
F	Opens the	Cross Table Wizard				
	_		2013	2014	2015	
	-					
Ľ						
	ATLANTIC	Diane Meyer	\$1,117,395.96	\$809,028.71	\$866,456.47	
	-	Karen Walker	\$65,860.00	\$349,603.38	\$376,172.84	
	-	Tim Rosenberg	\$240,590.29	\$73,173.00	\$78,634.00	
		Total ATLANTIC	\$1,423,846.25	\$1,231,805.09	\$1,321,263.31	
	CENTRAL	James Smith	\$260,713.50	\$2,515,405.81	\$877,679.15	
		John Brown	\$666,119.22	\$60,028.75	\$70,754.50	

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





Cross-Table Assistant - Step 3 of 3		×
	Build your dynamic cross-table by mo right window to the left areas Columr Several fields can be moved into eact	ns, Rows and Data.
Remove Quarter and Month dimensions from here: —	Columns Year Quarter Month	AREA DATE SALNAME TOTAL Year Quarter Month
Rows AREA SALNAME	Data TOTAL	
< <u>B</u> ac	k Next > Finish	Cancel Help

and click Finish

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

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

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

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

New Report		x
-	Blank Report Report from Query Report Book Report from Raw Cross Table Data	

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





Data Source Item:

lita Cro	iss-Lable D	lemo Mul	ticriteria i	for_Report

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

Report Template	Preview (Double-click to enlarge)
Standard Customized	
<no template=""> Portrait A4 Blue Glass Header Extended Arial Portrait A4 Green Glass Header Extended Arial Portrait A4 Orange Glass Header Extended Arial Portrait A4 Bordeaux Glass Header Extended Verdana Portrait A4 Grey Glass Header Extended Verdana Portrait A4 with 3D Bevel Blue Portrait A4 with 3D Bevel Grey Portrait A4 A Extended Grey</no>	NIC A PAC NIC NIC NIC NIC

A4 Format. Orange Glass Header, Fixed Width and Modifiable Height. Arial Font

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

	💷 Click and D	ecide Web Demonsti	ation.wfv* 🙀 R	eport*				-
		1	2 · · · 1 · ·	. 3	(1) 4 (1) (1)	5	1 * * * 6 * *	
	💿 🖗 🌳 Repo	ort Header						
	💿 🖗 🌳 Page	Header						
- -		Cr	oss-Table	Demo_	Multicrit	eria_for_	Report	
l :	AREA	SALNAME	2013	2014	2015			
	💿 🖗 🗣 Details							
•	AREA	SALNAME	TOTAL1	TOTAL2	TOTAL3			
	💿 🖓 🌳 Page	Footer						
·	='Printed on'+	FormatDateTime('dddd	d of mmmm, yyyy)+	fa::::::	::: : 🕵 :	: : ⊨'¢opyright	Click & DECIDE	::::='P:
	🔍 🖓 🌩! Repo		·				·	

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

5. Run the Repot to check the Result:

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



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

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

💿 🖓 🍁 Report Header				
• • Page Header				
	Cross-Table	Demo_Multicri	iteria_for_Repo	rt
AREA	SALNAME	2013	2014	2015
Optimis Optimis	•			
AREA	SALNAME	TO†AL1 .		TOTAL3
●				
='Printed on '+FormatDate	eTime('dddd d of mmmm, yyyy')+'	at : : : : : : : : : : : : : : : :	='Copyright © Click & DE	CiDE
O 🖓 🛸 Report Footer				
TOTAL				

7. Final Result:

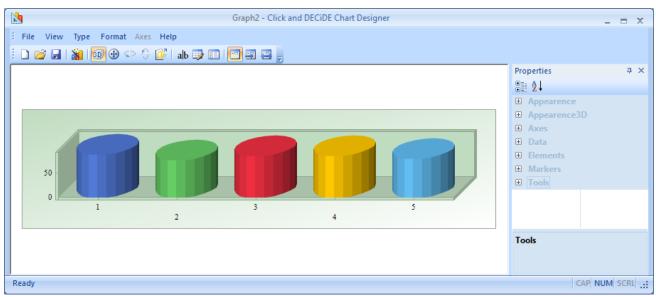
	Cross-Table	Demo_Multicrit	eria_for_Rep	ort
AREA	SALNAME	2013	2014	2015
ATLANTIC	Diane Meyer	\$1,117,395.96	\$809,028.71	\$866,456.47
ATLANTIC	Karen Walker	\$65,860.00	\$349,603.38	\$376,172.84
ATLANTIC	Tim Rosenberg	\$240,590.29	\$73,173.00	\$78,634.00
CENTRAL	James Smith	\$260,713.50	\$2,515,405.81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





7. Click&DECiDE Chart Designer

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



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

7.1. Displaying the Properties

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

				Gra	aph1	- Click and DECiDE
E File View Type	Format	Axes	Help			
i D D <u>I</u> oolbars	and Dock	ing Wi	ndows	•	V	Standard
Status Ba	Status Bar				\checkmark	Properties
Layout			•		Customize	

7.2. Opening a Chart Template

Use the command **File> Open** and search for the required template file having the cfx extension in the default directory C:\Program Files\Click and DECiDE\BAI\ChartModels. This command will not display a preview of

each template. You also can use the *income* icon in the Toolbar to display a preview of all existing templates and select the one you need. We recommend this method, much easier to see the more appropriate template.



MCLick&DECiDE

Chart Models	
$\begin{array}{c} 63.00 \\ 42.00 \\ 21.00 \\ 0.00 \\ 1 \\ 2 \\ 3 \\ 4 \\ 5 \\ \end{array}$	5 4 3 2 1 50 530 560 590
Bar	Bar_3D_Horizontal
	OK Cancel

7.3. Saving a Chart as a Template

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

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

7.4. Most Used Commands

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

7.4.1. Change the Chart 3D Effect

Use the ¹⁰⁰ icon to enable or disable the Chart3D effect. In the Properties box, this icon will change the following **Chart3D** item:

Pro	operties	
	Ź↓	
÷	Appearence	
Ξ	Appearence3D	
	AngleX	40
	AngleY	230
	Chart3D	False
	Cluster	False
	Perspective	0
	View3D	False
	View3DDepth	50
	View3DLight	Fixed
	WallWidth	4





7.4.2. **Change the View 3D Effect**

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

Pro	perties		Ļ
•	A ↓		
+	Appearence		
	Appearence3D		
	AngleX	40	
	AngleY	230	
	Chart3D	True	
	Cluster	False	
	Perspective	0	
	View3D	True	
	View3DDepth	50	
	View3DLight	Fixed	
	WallWidth	4	

7.4.3. Change the Appearance3D AngleY

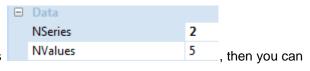
If the Chart3D and View3D effects are enabled, use the ^{SP} icon to modify the **AngleY** value in the above picture.

Change the Appearance3D AngleX 7.4.4.

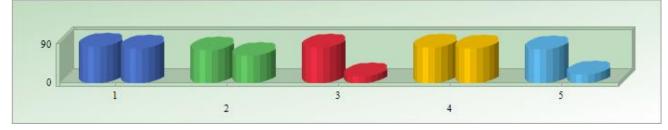
If the Chart3D and View3D effects are enabled, use the ² icon to modify the **AngleX** value in the above picture.

7.4.5. **Change the Cluster Effect**

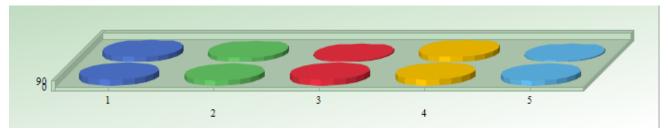
If more than one series is defined in the Data Properties
use the 🧾 icon to change the cluster effect:



Example with Cluster set to False in the Appearance3D properties:



Example with Cluster set to True in the Appearance3D properties:



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7.4.6. **Change the Chart Type**

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

Type Command **Properties Pane** Type Format Axes Help Line \simeq <u>A</u>rea Properties Д ₿₽ Curve Appearence Area-Curve Any choice of a AxesStyle FlatFrame Chart Type will BackColor 227, 227, 227 Bubble affect the Gallery BackObject Gradient and GalleryObj <u> (</u> Sc<u>a</u>tter BorderObject Default Border in the right Bar Appearance Font Arial(8) **Properties Pane** Gantt Gallery Gantt • Cube GalleryObj Gallery Object Gantt Gaps 0, 0, 0, 0 ٩ Pie 0 Doughtnut Pyramid Δ <u>R</u>adar 躛 Pareto 2 Contour/Spectral ۶. Surface

7.4.7. **Adding Point Labels**

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

-	Ар	pearence		
	Ax	esStyle	FlatFran	ne
	Ba	ckColor	227,	227, 227
	+	BackObject	Gradien	t
	+	BorderObject	Default	Border
	Fo	nt	Arial(8)	
	Ga	llery	Bar	
	Ga	lleryObj	Gallery	Object Bar
	+	Gaps	0, 0, 0, 0)
	Gri	id	None	
	Ins	ideColor	192,	220, 192
	Pa	lette	Default.	Windows
	Po	intLabelAlign	Center,	Bottom
	Po	intLabelAngle	0	
	Po	intLabels	True	
	Ser	ries	(Collect	tion)





Modifying the Point Label Color 7.4.8.

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

PointLabels	True	
Series	(Collection) .	

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

Series Collection Editor		
Members:		
Serie#1	Property	Value
	MarkerShape	Many 🔺
	MarkerSize	3
	MarkerStep	1
	Pattern	Horizontal
	Picture	none
	PointLabelAlign	
	PointLabelAngle	0
	PointLabelColor	0, 0, 128
	PointLabelFont	Arial(8)
	PointLabels	True
	Scheme	Solid
	SeparateSlice	0
	SmoothFlags	
	Stacked	False
	Visible	True
	Volume	75
Add <u>R</u> emove	YAxis	Main
		Close

Modifying the Palette Color 7.4.9.

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

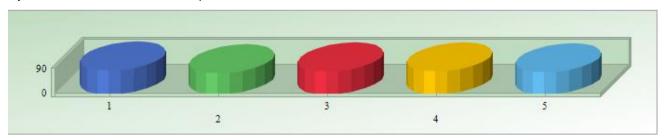
Palette	Default.Windows	•
PointLabelAlign	Default.Windows	
PointLabelAngle	Nature.Sky	
PointLabels	Default.EarthTones Default.ModemBusiness	
Series	DarkPastels.Pastels	
SmoothFlags	Mesa	
Appearence3D	Nature.Adventure	
AngleX	ChartFX5 HighContrast	
AngleY	Vivid	
Chart3D	Default.ChartFX6	
Cluster	DarkPastels.AltPastels	
D+	Default.Alternate	

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7.4.10. Modifying the Multiple Color Effect

If you have a Bar Chart for example as follow:



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

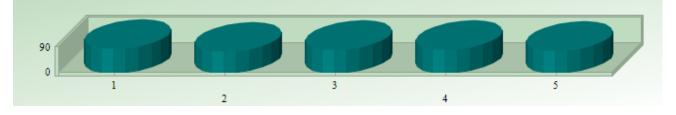
	Markers	
	Border	True
	BorderColor	168, 168, 168
	BorderEffect	Dark
	CylSides	20
	LineStyle	Solid
	LineWidth	1
	MarkerShape	Many
	MarkerSize	3
	MarkerStep	1
	MultipleColors	False 🔹
	Scheme	Solid

	PointLabels	True	
Then use the	Series	(Collection)	to modify if needed the color to be

used in the Series Collection Editor:

Series Collection Editor			X
Members:			
Serie#1	Property	Value	
	AlternateColor	0, 0, 254, 254	-
	Border	True	
	BorderColor	128, 0, 0	
	BorderEffect	Dark	
	Color	0, 128, 128	-
	CylSides	20	
	Gallery	Bar	

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



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7.4.11. Change the number of Series or Values

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

Data	
NSeries	3
NValues	5

7.4.12. Change the color for each Series

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

PointLabels	True	
Series	(Collection)	

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

lembers:			
Serie#1	Property	Value	
Serie#2 Serie#3	AlternateColor	0, 0, 254, 254	-
sene#s	Border	True	
	BorderColor	128, 0, 0	
	BorderEffect	Dark	
	Color	0, 128, 128	
	CylSides	20	
	Gallery	Bar	
	InternalBorder	False	
	Legend		

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

Serie#1	Property	Value
Serie#2 Serie#3	AlternateColor	77, 153, 77
3616#3	Border	True
	BorderColor	168, 168, 168
	BorderEffect	Dark
	Color	102, 204, 102 👻
	CylSides	20
	Gallery	Bar
	InternalBorder	True
	Legend	

Repeat the same steps for the Serie#3.



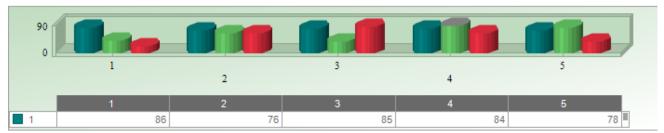


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7.4.13. Display the Data Editor

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



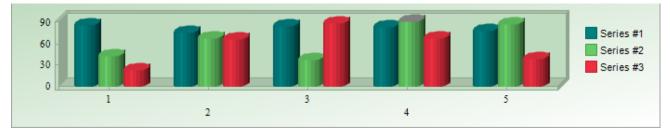
This command will change the right Properties pane in the **Tools/Data Editor** level branch:

-	Tools	
	DataEditor	True 🔹
	 DataEditorObj 	
	LegendBox	False
	EgendBoxObj	
	SerLegBox	False
	SerLegBoxObj	

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

7.4.14. Display the Series Legend Box

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



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

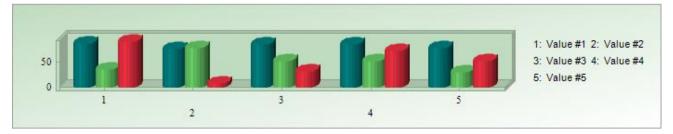
Tools	
DataEditor	False
DataEditorObj	
LegendBox	False
EgendBoxObj	
SerLegBox	True 🔹
SerLegBoxObj	

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



7.4.15. Display the Legend Box

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



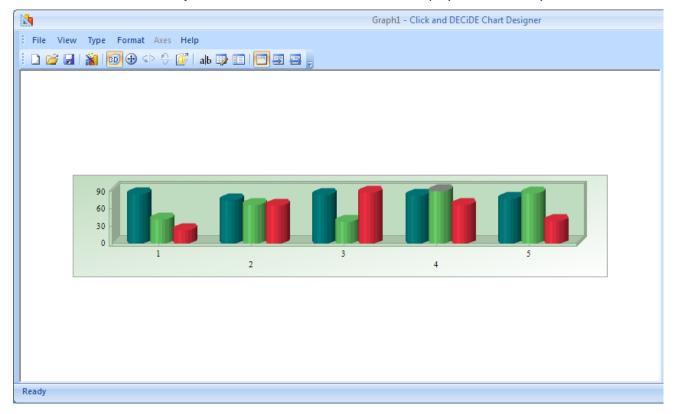
This command will change the right Properties pane in the **Tools/LegendBox** level branch:

-	То	ols		
	Da	taEditor	False	
	÷	DataEditorObj		
	Leg	gendBox	True	Ŧ
	+	LegendBoxObj		
	Ser	LegBox	False	
	+	SerLegBoxObj		

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

7.4.16. Change the Chart View Layout

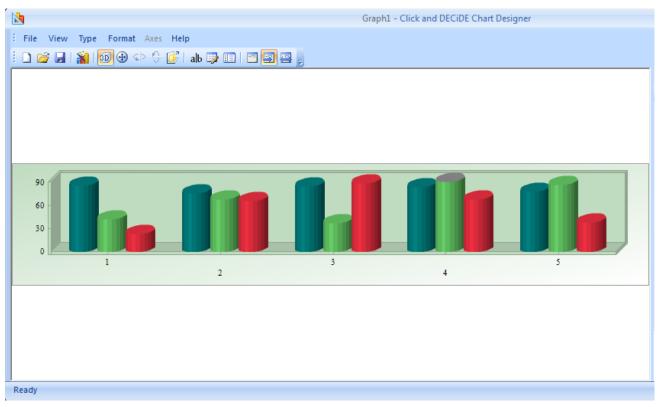
Click the command **View> Layout> Default** or click the 🛄 icon to display the **Default** layout:



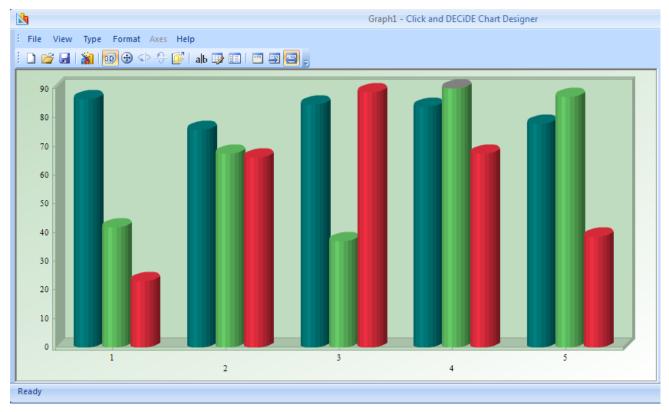
Contact us: E-mail: <u>support@clickndecide.com</u> Tel: +33 (0)4 67 84 48 00 Headquarters: Click&DECiDE 130, rue du Baptistou - 34980 St Gély du Fesc, France. To contact your nearest Click&DECiDE partner, <u>click here</u>.



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



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





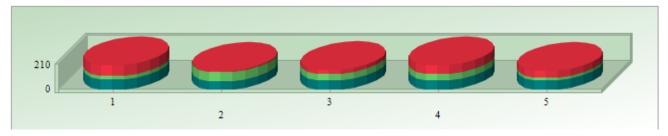


7.4.17. **Define Stacked Series**

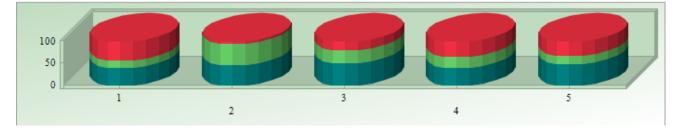
If more than one series id defined, you can wish to display stacked values. To do so, open the Markers level branch in the right Properties pane, and select the option among No, Normal or Stacked 100:

Markers	
Border	True
BorderColor	168, 168, 168
BorderEffect	Dark
CylSides	20
LineStyle	Solid
LineWidth	1
MarkerShape	Many
MarkerSize	3
MarkerStep	1
MultipleColors	False
Scheme	Solid
Stacked	Normal 🔹
Volume	No
Tools	Normal
DataEditor	Stacked100

Example with the Normal option:



Example with the Stacked100 option:



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

7.4.18. **Modifying Axes Values Attributes**

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

Ах	es	
+	AxisX	
+	AxisY	
+	AxisY2	

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7.4.18.1. **Autoscale**

Select True for the AutoScale branch level

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

7.4.18.2. Font and Size

Define the Font and size in the Font branch level

FirstLabel	0
Font	Times New Roman(8)
ForceZero	True

7.4.18.3. Label Format

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

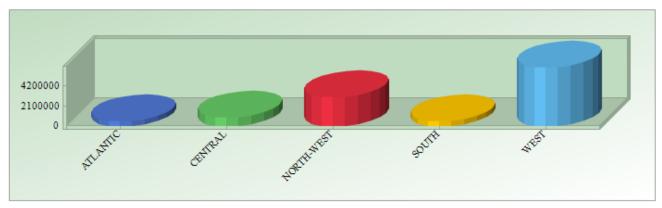
-	LabelsFormat	
	CustomFormat	
	Decimals	2
	Format	Currency 🔹
	LabelValue	1

7.4.18.4. Label Angle

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

Grid	
Gridlines	False
Interlaced	False
Inverted	False
LabelAngle	45
LabelsFormat	

Example with a 45° value:



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7.4.18.5. **Staggered Values**

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

Staggered False: one row is used for all X values



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



7.4.18.6. **Axis Title**

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

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

7.4.18.7. **Display or Hide an Axe**

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

7.4.19. Add a Chart Title

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





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-	Elements			
		ConditionalAttributes	(Collection)	
		UserLegend	True	
	ConstantLines		(Collection)	
	Panes		(Collection)	
[Stripes		(Collection)	
	Titles		(Collection)	

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

Titles Collection Editor						
Members:						
My Title	Property	Value				
	Alignment	Center				
	BackColor	0, 255, 255, 255				
	DockArea	Тор				
	DrawingArea	True				
	Flags	DrawingArea				
	Font	Arial(12)				
	Gap	0				
	LineAlignment	Far				
	LineGap	2				
	Text	My Title				
	TextColor	128, 0, 128				

3. Click Close



4. Check the result



7.4.20. **Changing the Axe Style**

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



Appearence	Appearence			
AxesStyle	FlatFrame			
BackColor	None			
BackObject	Frame3D			
Angle	Math FlatFrame			
	rideriene			

7.4.21. **Changing the Background**

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

BackObject	Gradient	
Angle	Default Background	
ColorFrom	Image	
0 L T	Gradient	

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

BackObject	Gradient
Angle	45
ColorFrom	192, 220, 192
ColorTo	0, 255, 255, 255
Туре	Horizontal
	Horizontal
	Vertical
	BackwardDiagonal
	BackwardDiagonal ForwardDiagonal

7.4.22. **Changing the Chart Border**

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

BorderObject	Default Border
	None
	Default Border
	Image Border

Example without Border:



Click the + sign before BorderObject to see additional options.

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Example with Default Border:

Click the + sign before BorderObject to see additional options.

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



Click the + sign before BorderObject to see additional options.

7.4.23. Changing the Gap Values

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

7.4.23.1. Left Gap

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

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

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

7.4.23.2. **Top Gap**

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

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

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

7.4.23.3. **Right Gap**

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

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

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

7.4.23.4. **Bottom Gap**

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



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

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

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