

Using Report Builder in Total Grant Solution (TGS)

How to set up a new report

(Note: The steps on pages 1 & 2 only need to be done the first time you create a new report; skip to the second step on page 3 if you want to run a report that already shows in the “existing reports” box on the top left section of the screen)

Click the “New” button above the box that says “existing reports” on the top left



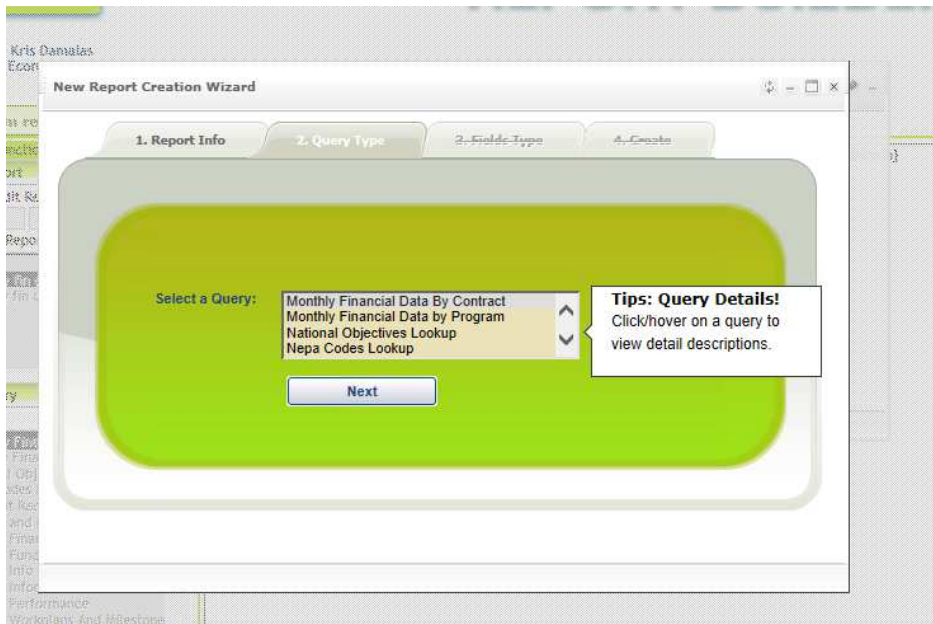
Select “data table” in the first drop down (so your report will show/export as a CSV or Excel). Enter a name for your report template in the second line. The comment box is optional. Note: whatever you enter in the “report name” field will be how the report shows up in the “existing reports” box above so be descriptive.



Click “next”

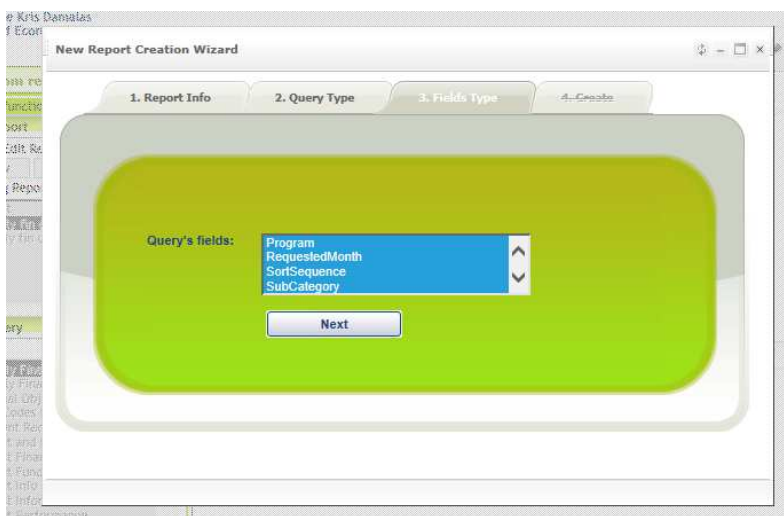
In the query type tab that appears, choose the query you want to associate with this report. Note the on-screen hint. If you hover your cursor over each query it’ll give you an idea of the data fields and/or the type of information it will pull. A handful of the queries in TGS-EWD don’t have data to populate yet since the system is brand new. Many of the financial queries will, however. Most of the client-based ones will not as there isn’t client data being tracking in TGS-EWD.

Once you’ve chosen your query, click “next” again to proceed to the tab called “field type”



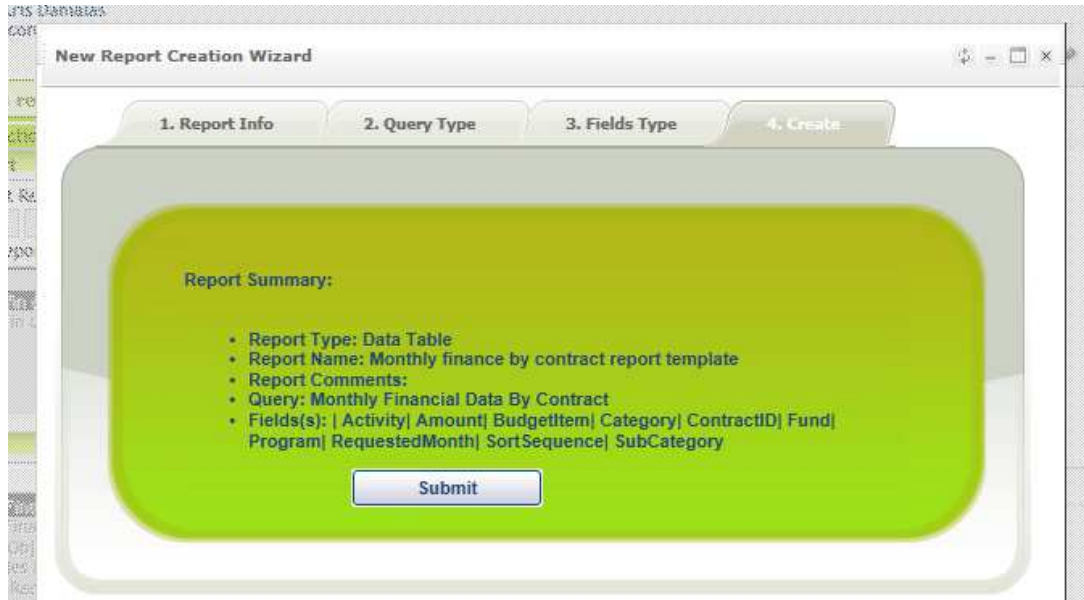
This screen allows you to choose the fields you wish to display. To select multiple fields, use the “shift” or “control” button and arrow keys on your keyboard.

(shift+arrow down will allow you to highlight all the fields in blue so they will all display on the report).
Click next when you have the fields you want highlighted.



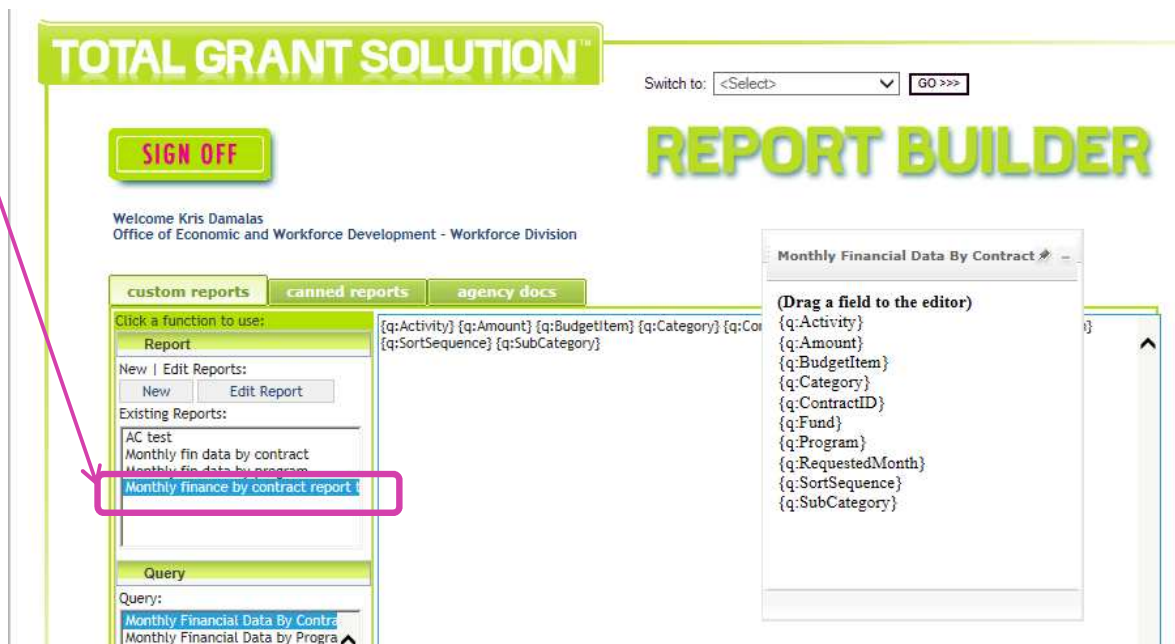
The final tab called “create” will show you a summary of what you’ve chosen in the other tabs. In the example below, you can see the selections I made. If you want to adjust any of these prior to saving this as a template, simply click on any of the tabs and change the fields accordingly.

When finished click “submit” on this final tab.

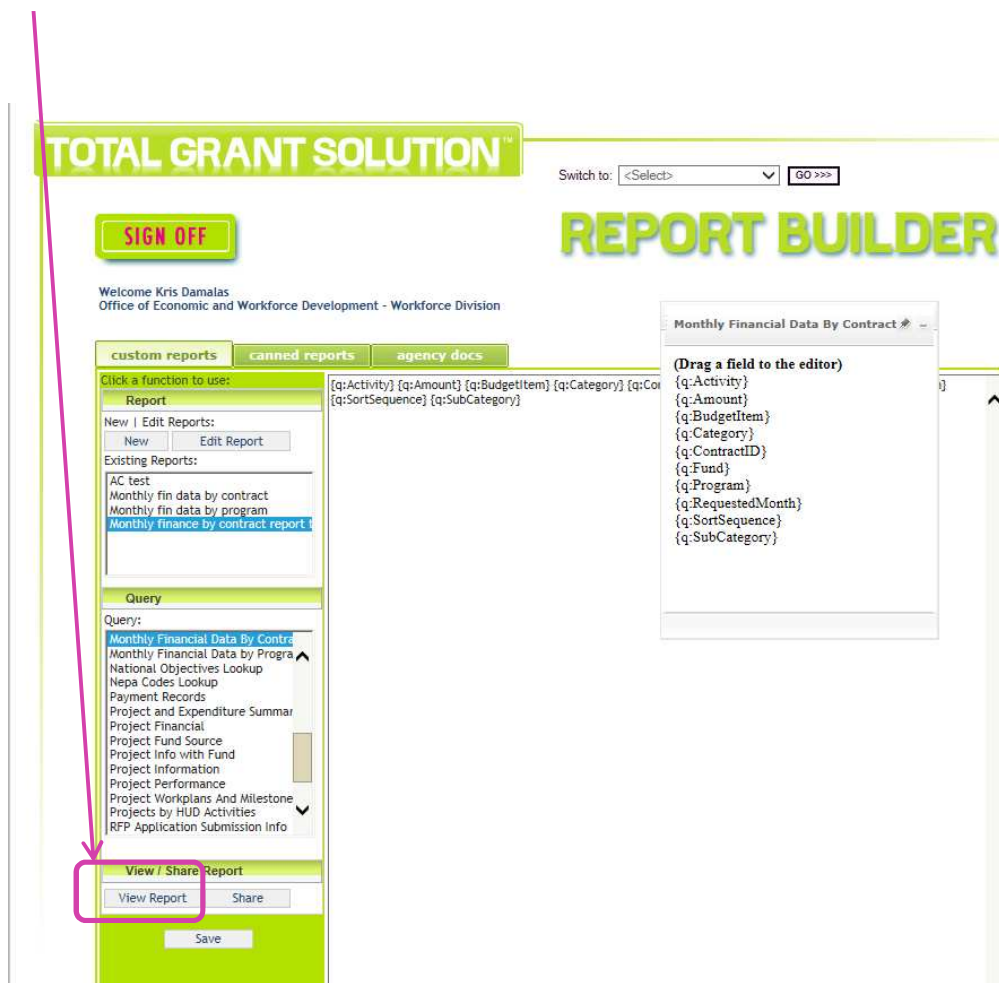


The main report builder screen will appear again and you’ll see your new report has been created in the “existing reports” box on the top left hand corner of the screen.

(Note: Compare the first screen shot of these directions with the screen shot below – see that the fourth report titled “Monthly finance by contract report” now exists)



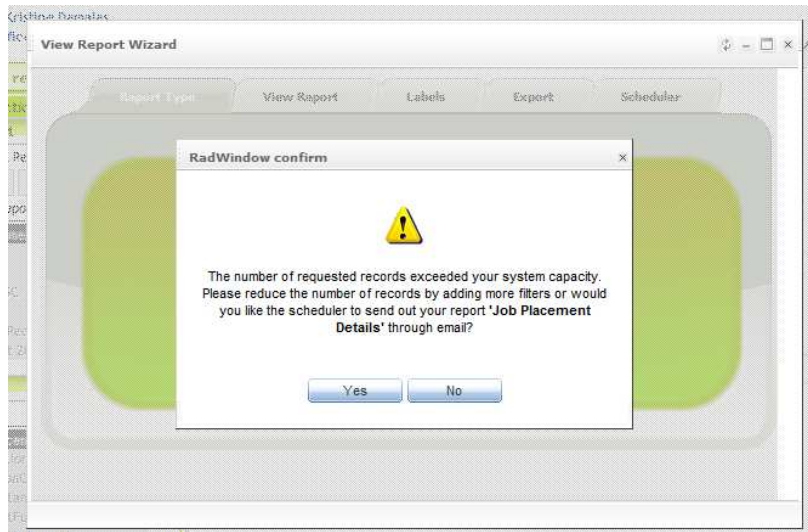
Once your template is created, select (highlight) it in the existing reports box and click the “view report” box on the bottom left hand section of the screen.



Depending on the type of report you’re running and the number of records, you may see a note that there are too many records to display and be prompted to send the report to the scheduler queue.

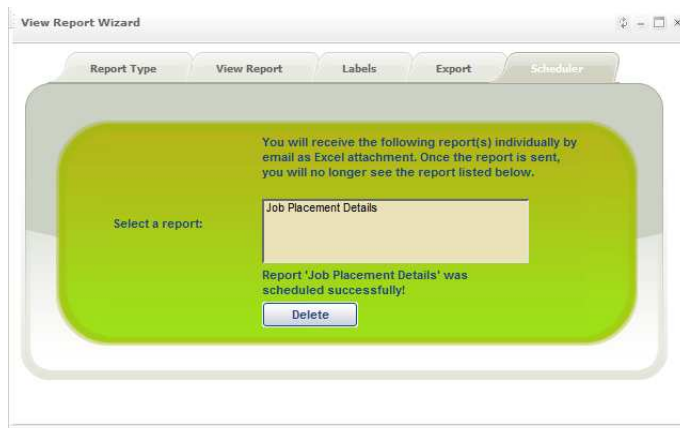
If this message appears, follow the next page of instructions. If it does not, skip the next page.

If you click on “yes” on the scheduler message:



The report wizard box will then appear – and you’ll be in the scheduler tab. If you leave the report in there, then you’ll get it emailed to you (no filters applied) overnight. Once you get the full excel sheet then you can filter down and manipulate it as needed. No additional steps are needed at this point.

Note: the example below is using the job placement details report but these steps are the same no matter what report you’re running.



If you click “no” on this schedule suggestion screen (or if the scheduler suggestion doesn’t appear on your report wizard pop up box)



Then the filter tab of the report wizard box will appear and you can choose appropriate filters as needed. Once you click on “select filter” it may load your filter very slowly (2+ minutes) depending on how many users are on the system, the speed of the internet connection you’re using, and the number of records it’s sifting through. You may also experience a delay when you click on “filter value” when setting your filters as needed

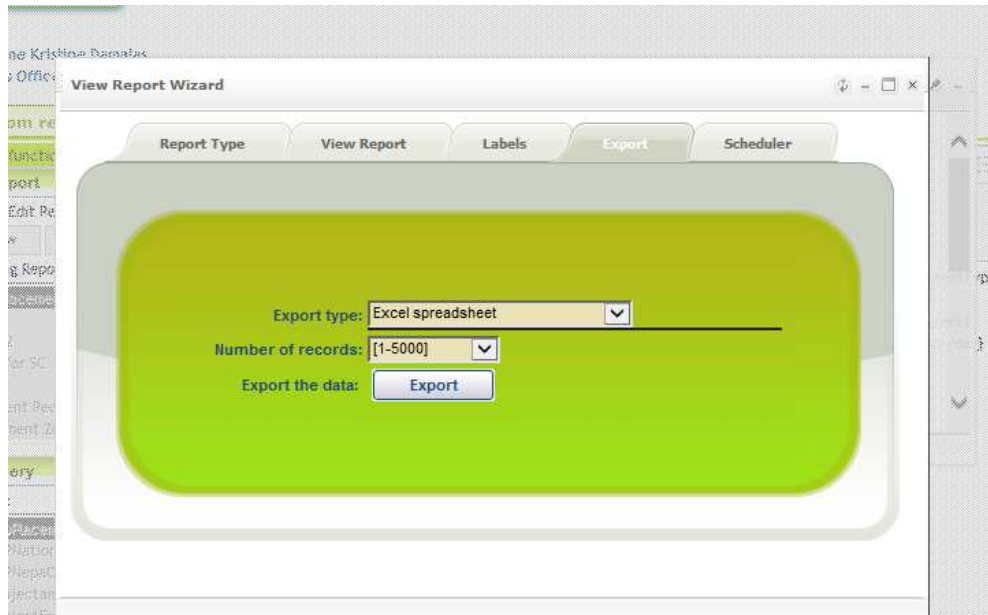
(suggestions: project year = current year if you only want the current year’s financial data)

The filters available will match the report fields you chose in the beginning steps and the query you’re running. For example, if you’re running a financial query you will probably not see “address” as one of the possible filters because address most likely does not exist as a field on any of the financial queries.



Once you’ve set your filters, click on the “export” tab and choose the appropriate options.

Depending on how the filters are set (eg if you’ve narrowed down your report so there are less than 5000 total records), you may be able to use the “export” tab. See below



Or you may see the following message on the export tab which directs you back to narrow the filters – or use the scheduler option. (see below) To use the scheduler option, close the view report wizard pop up box and click “view report” from the main report builder screen after picking the appropriate report query.

