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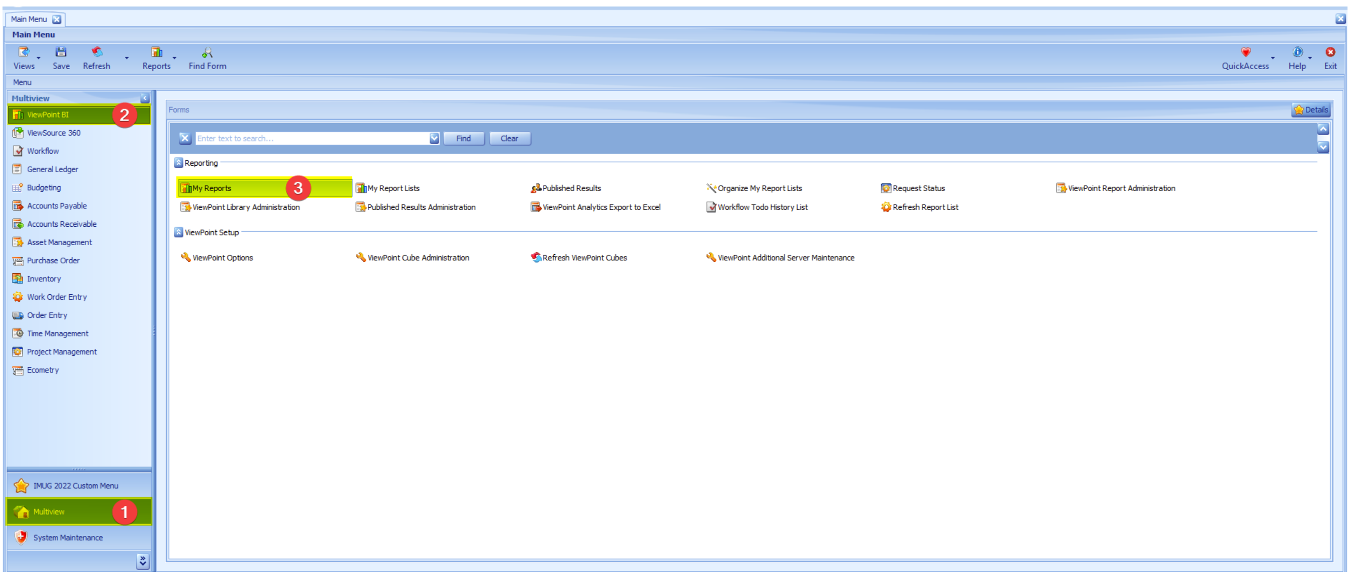
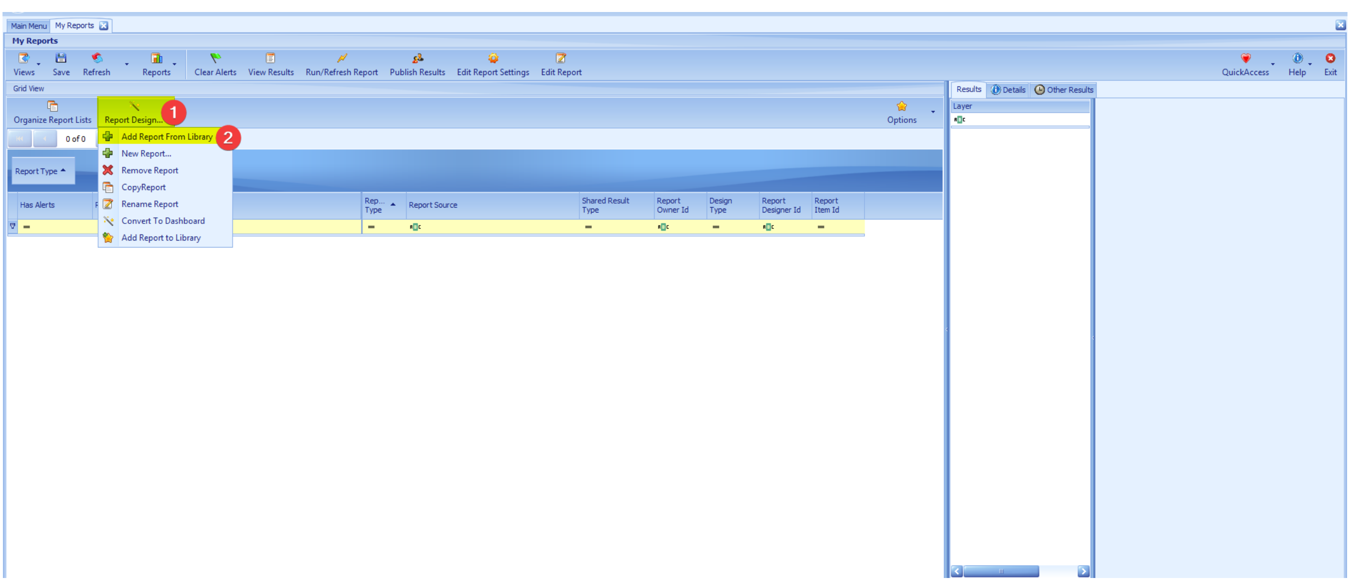
Detailed Reports – Basics

Adding New Reports from Multiview Library

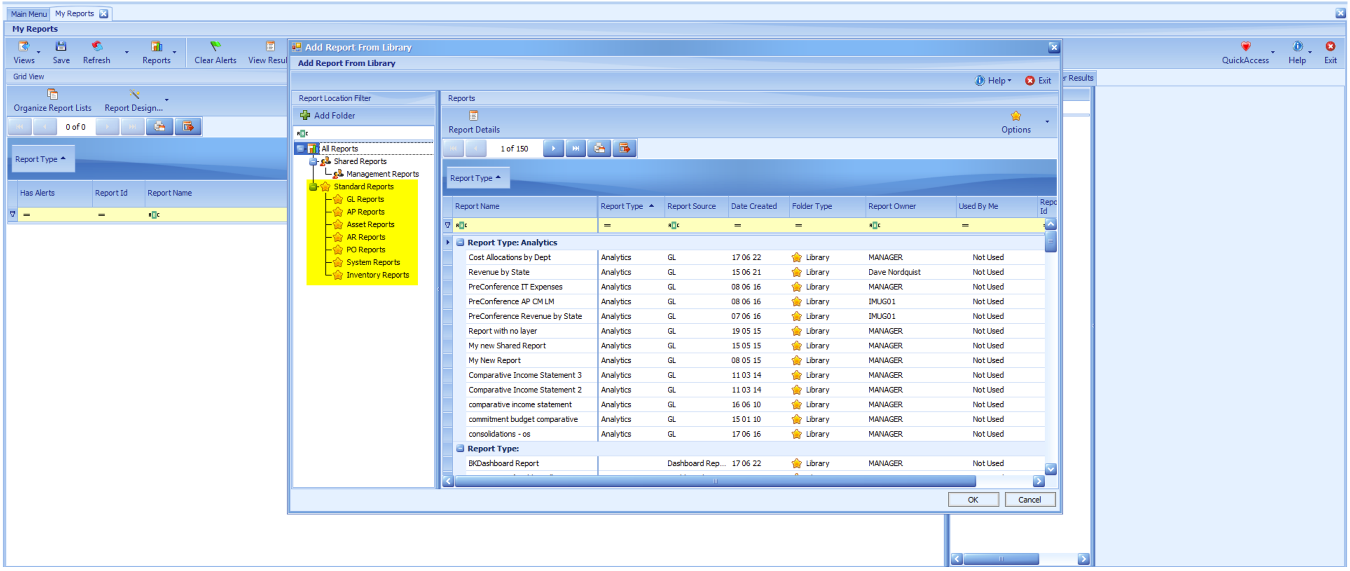
Multiview has a general list of Detail Reports that can be added to your "My Reports" module. To add these reports, navigate to Multiview > ViewPoint BI > My Reports. Select the module to display all the reports that you currently have.



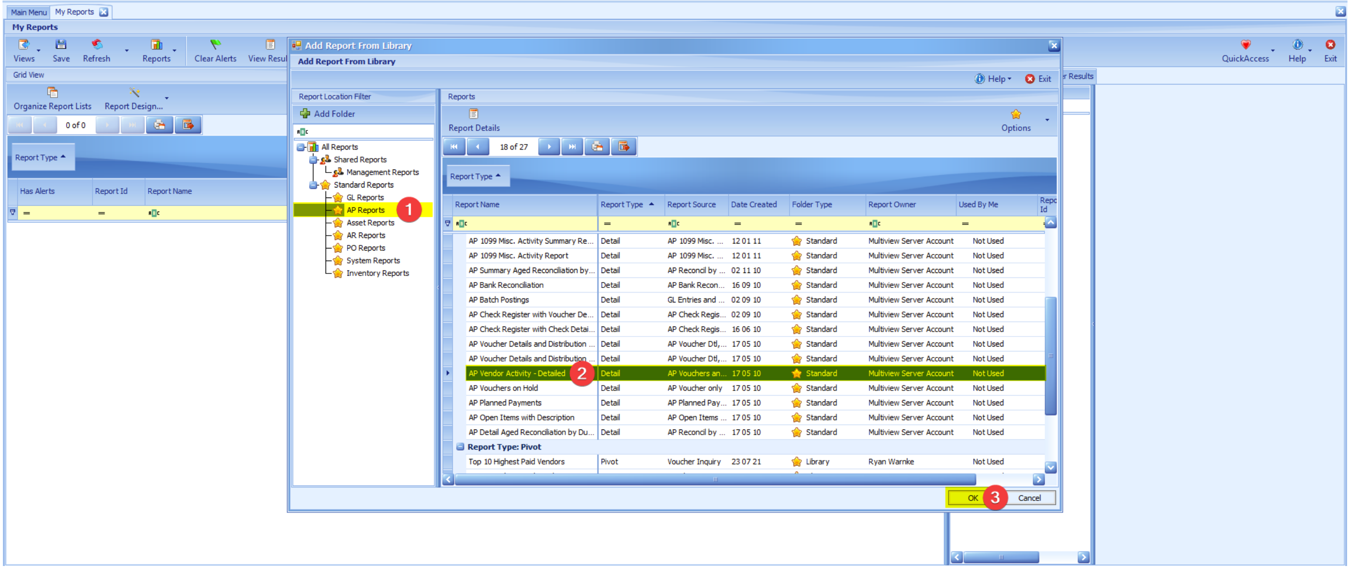
New reports can be added by selected Report Designer > Add Report From Library.



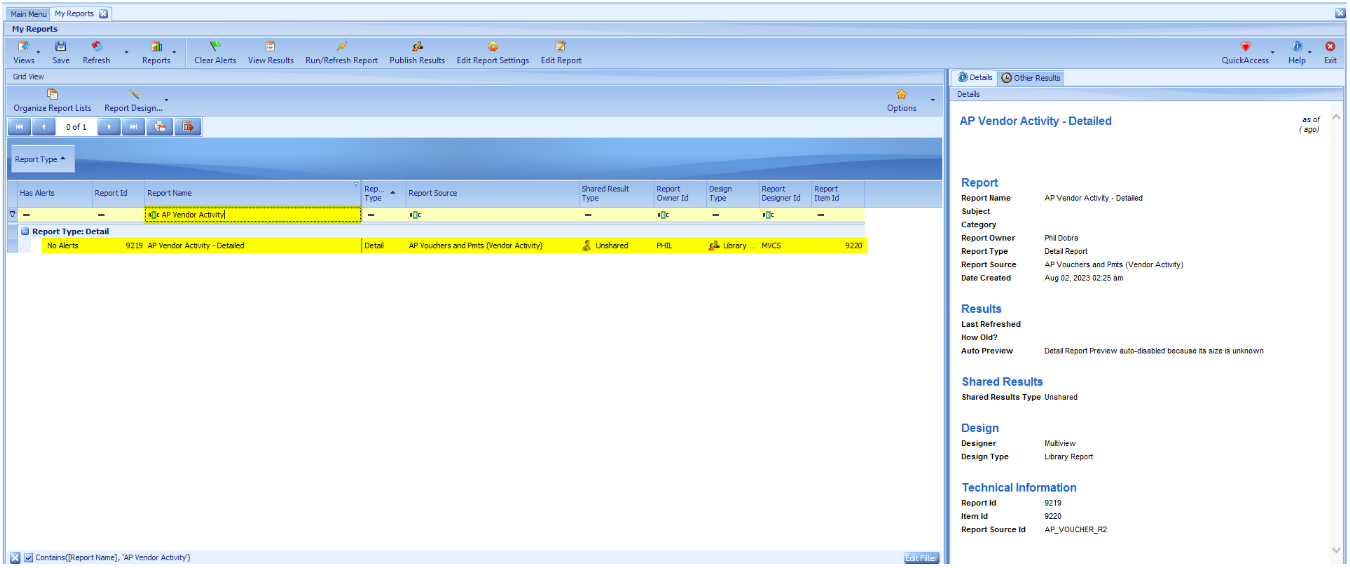
All reports will be shown. The Multiview standard reports are located on the left-hand panel with stars.



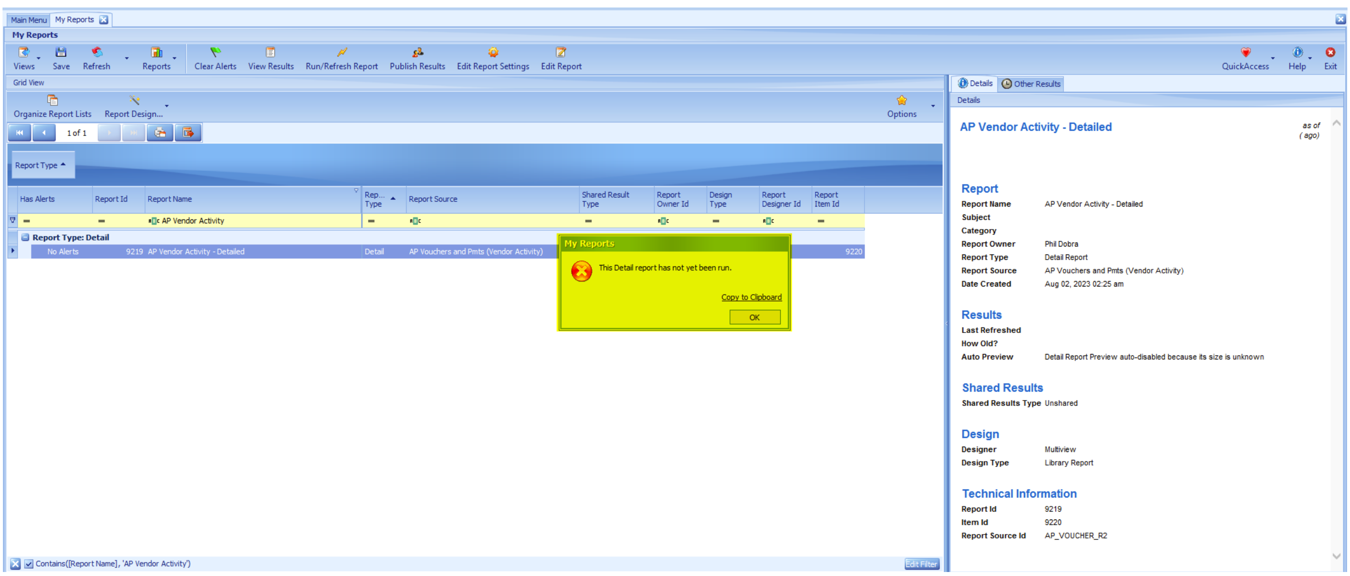
We will be demonstrating how to add a new standard report and run it for the first time using the AP Vendor Activity – Detailed report. This can be added to your “My Reports” by selecting AP Reports > AP Vendor Activity – Detailed > OK.



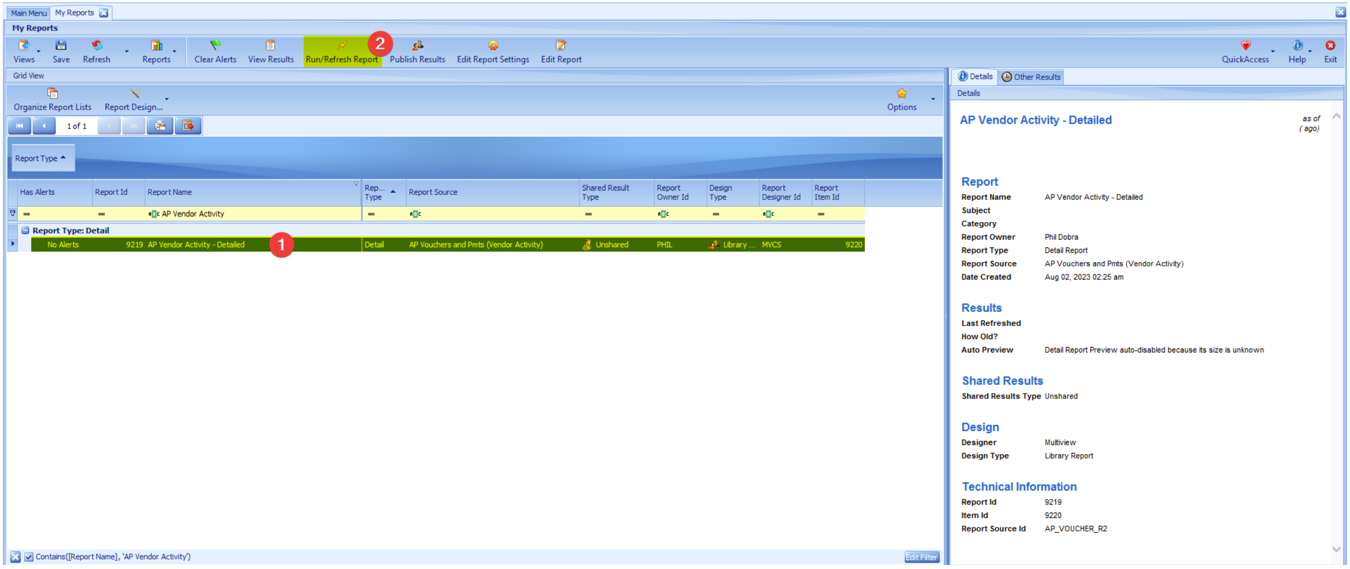
The newly added report will now appear in your “My Reports” module. You can search for the report name to easily find the report. This helps if you already have many reports in “My Reports”.



When running the report for the first time, you will have to first Run/Refresh the report. If you double click the report before Run/Refreshing, you will receive the error below.

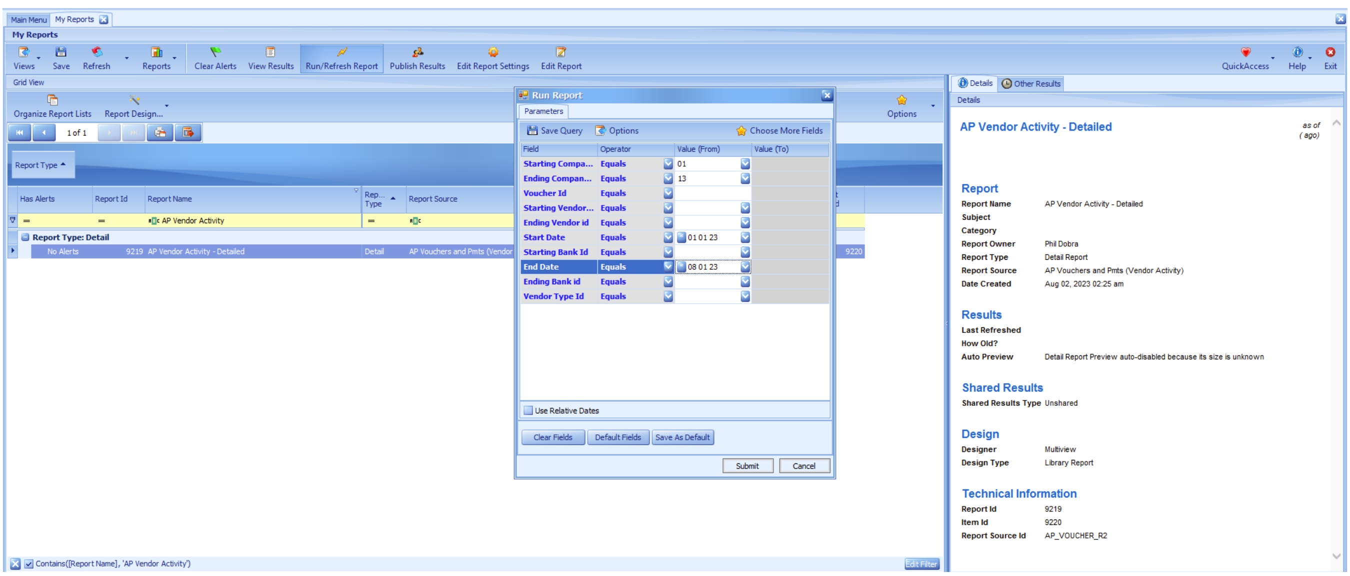


If you encounter this error, press "OK" and then Run/Refresh the report.

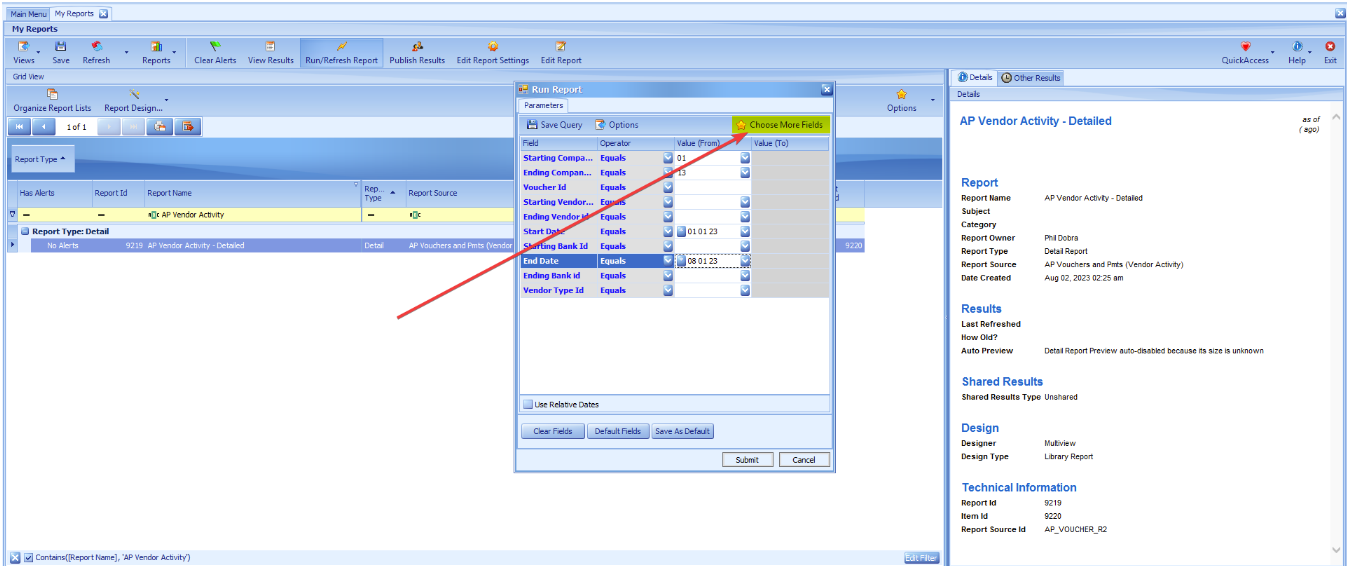


Entering Search Parameters to a Report

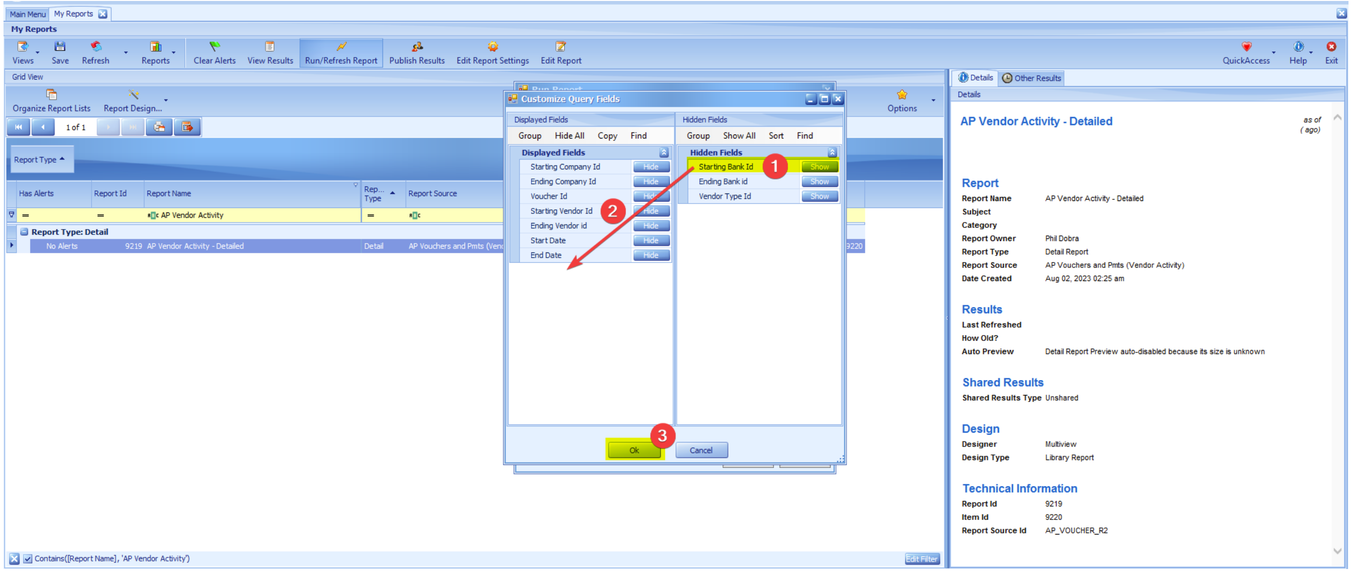
You will be prompted to enter a search parameter when adding a new report after selecting “Run/Refresh Report”.

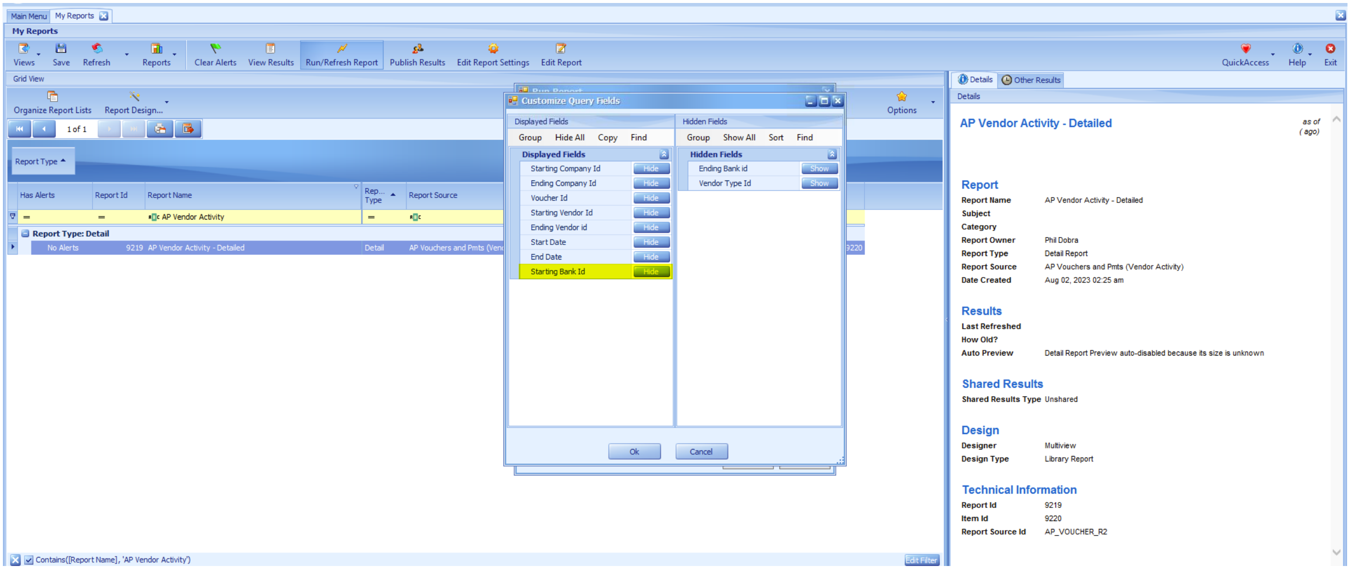


If there are additional parameters that you would like to include, you can select the “Choose More Fields” button to show additional search parameters. Please note that depending on the report, there may not be additional search parameters to add. In this report (AP Vendor Activity – Detailed), all the search parameters are already displayed.

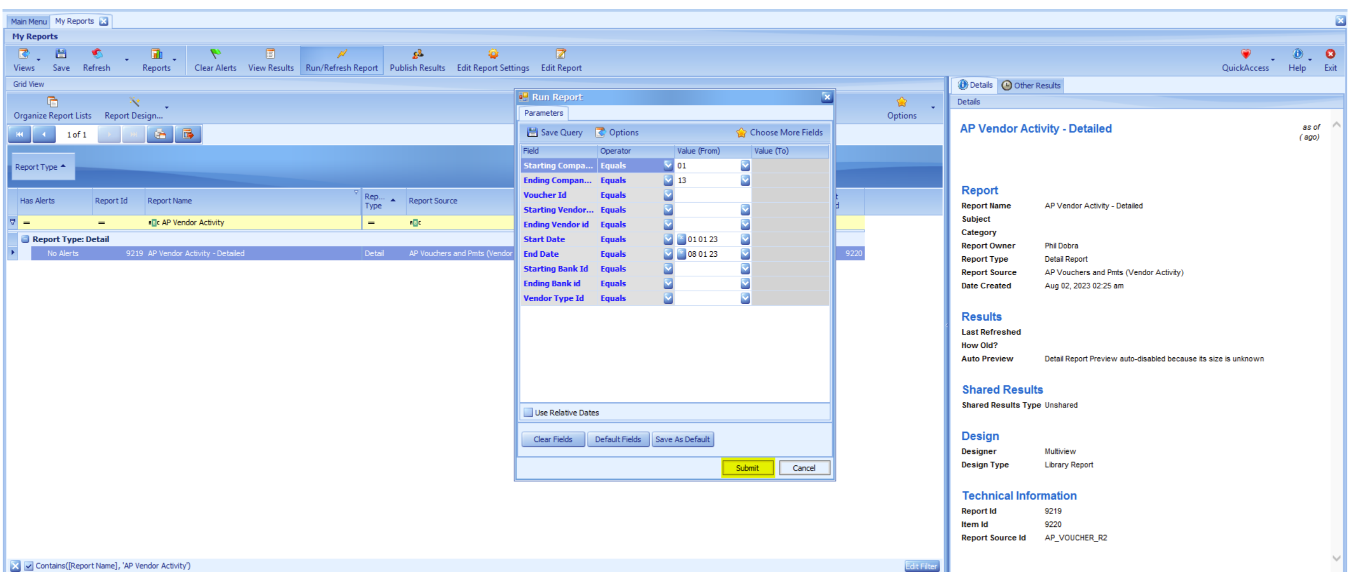


However, if there are other search parameters in other reports, you can add them to your search by clicking and dragging the field to the left side and pressing “OK”.

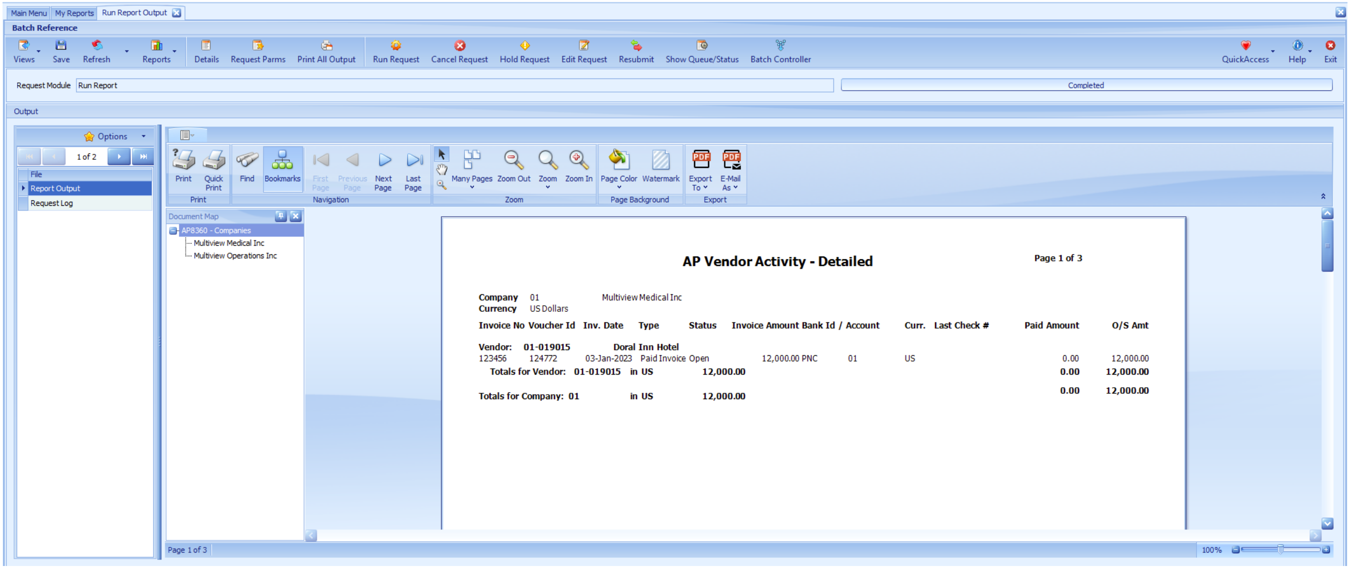




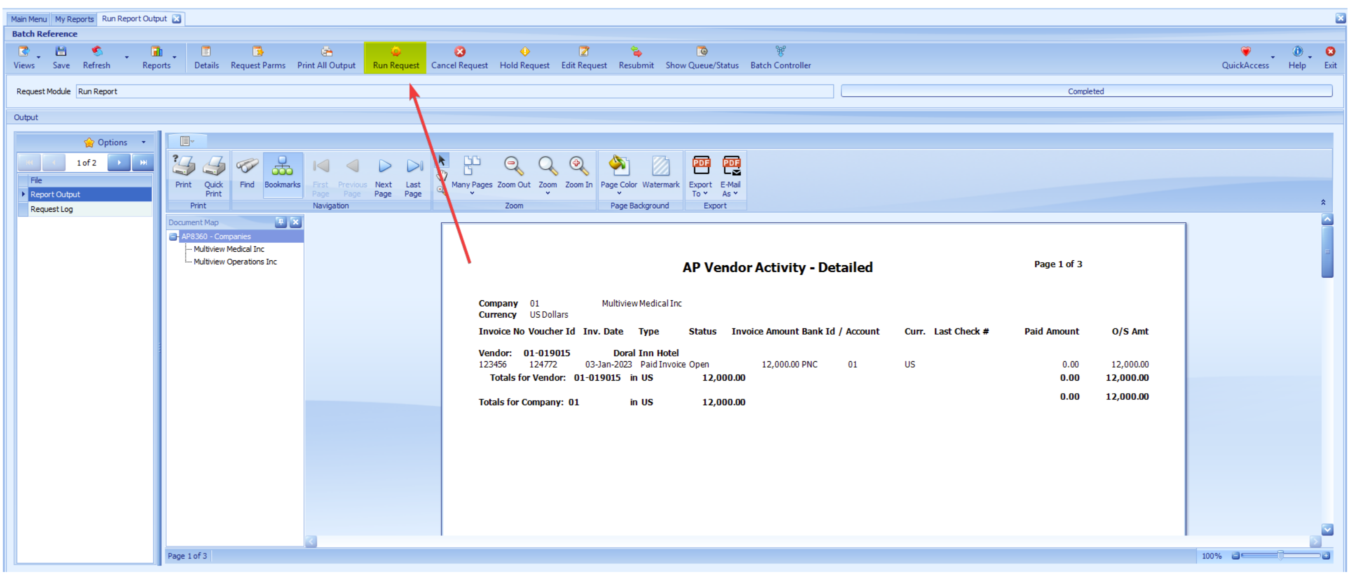
Once you have entered your search parameters, press “Submit” to run your report for the first time.



The report output will display.

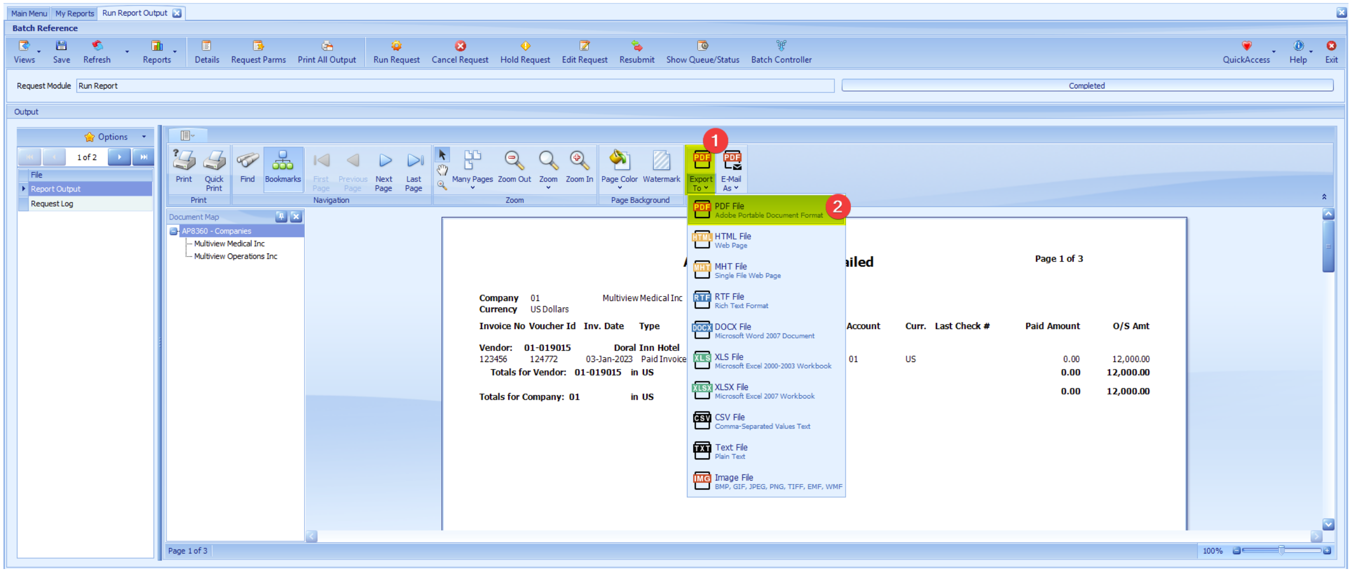


If you would like to enter new search parameters, you can select "Run Request" on the navigation bar and select new search parameters. The process will be the same as previously mentioned.

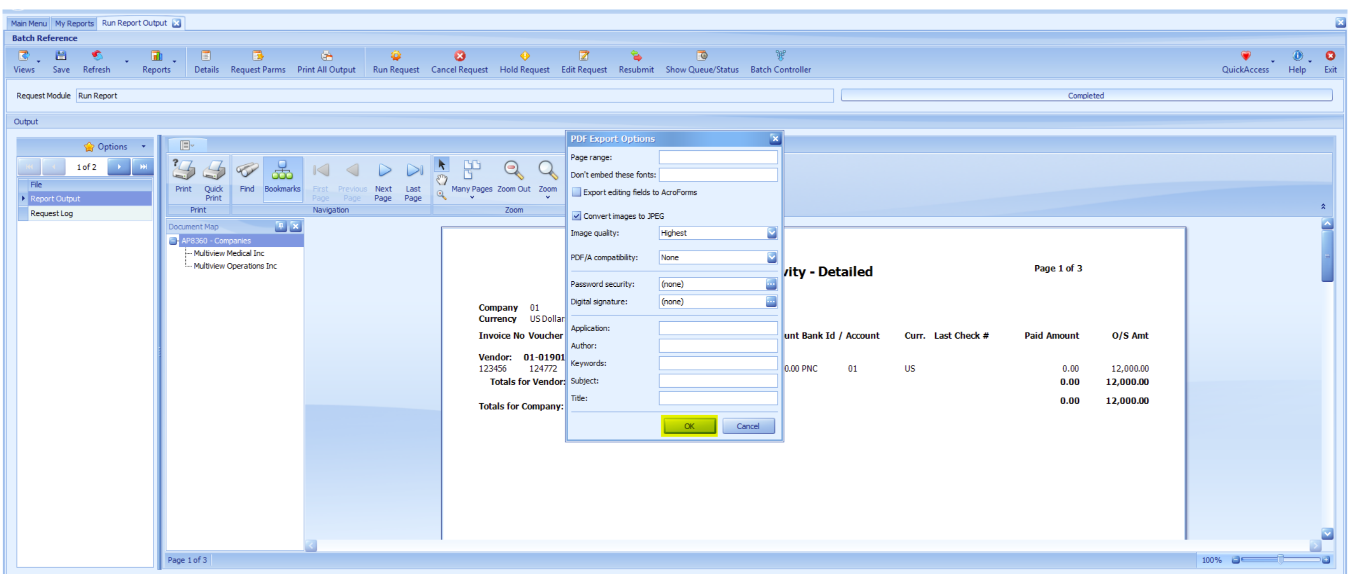


Exporting a Report

Once a Detailed Report is created, it can be exported to other programs for easier data manipulation. Select "Export To" and select the program you would like to export to. In this example, I will export this report to PDF.



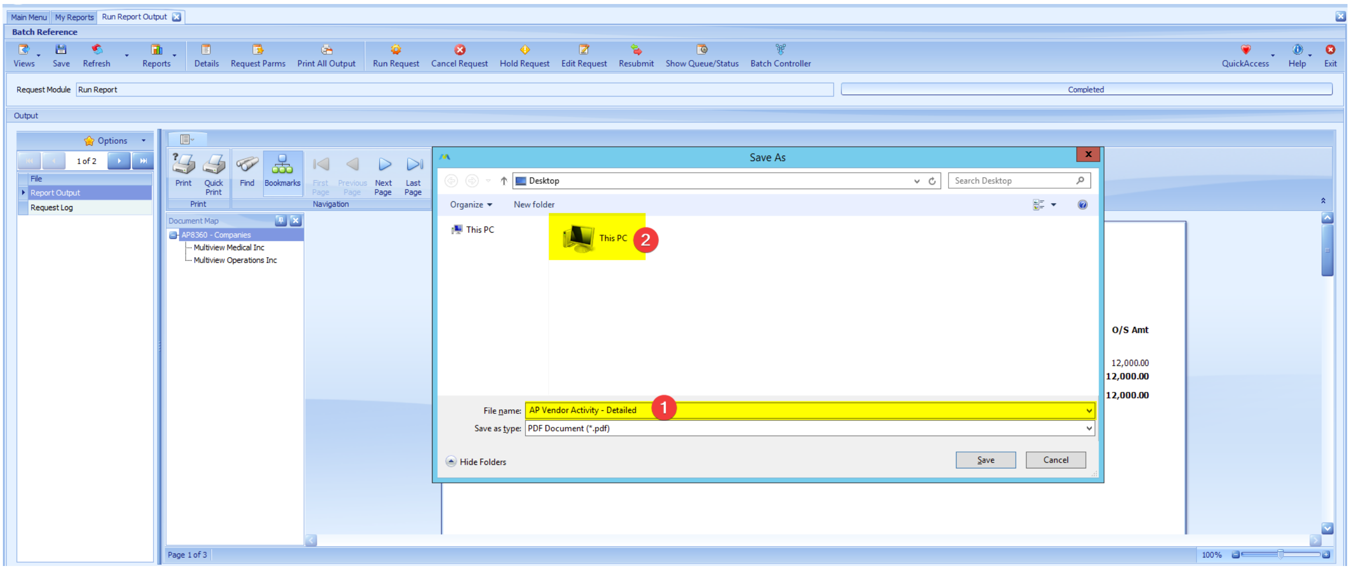
Select the export options you would like to include. This will vary depending on the export format. Once satisfied, select "OK" to complete the export.

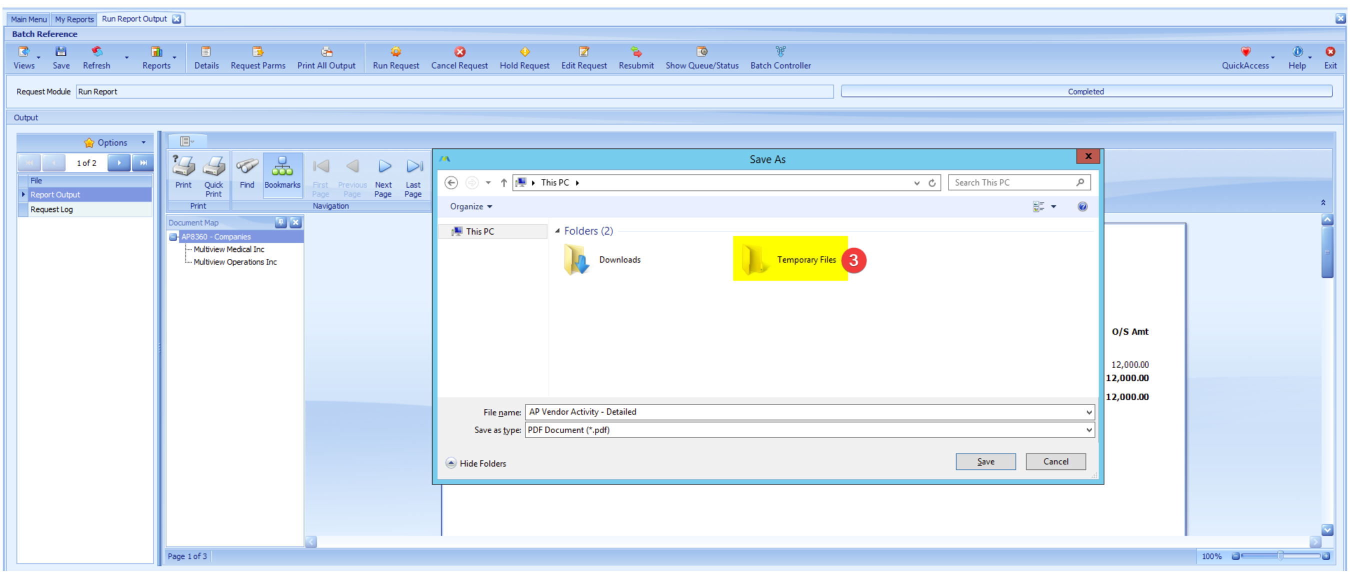


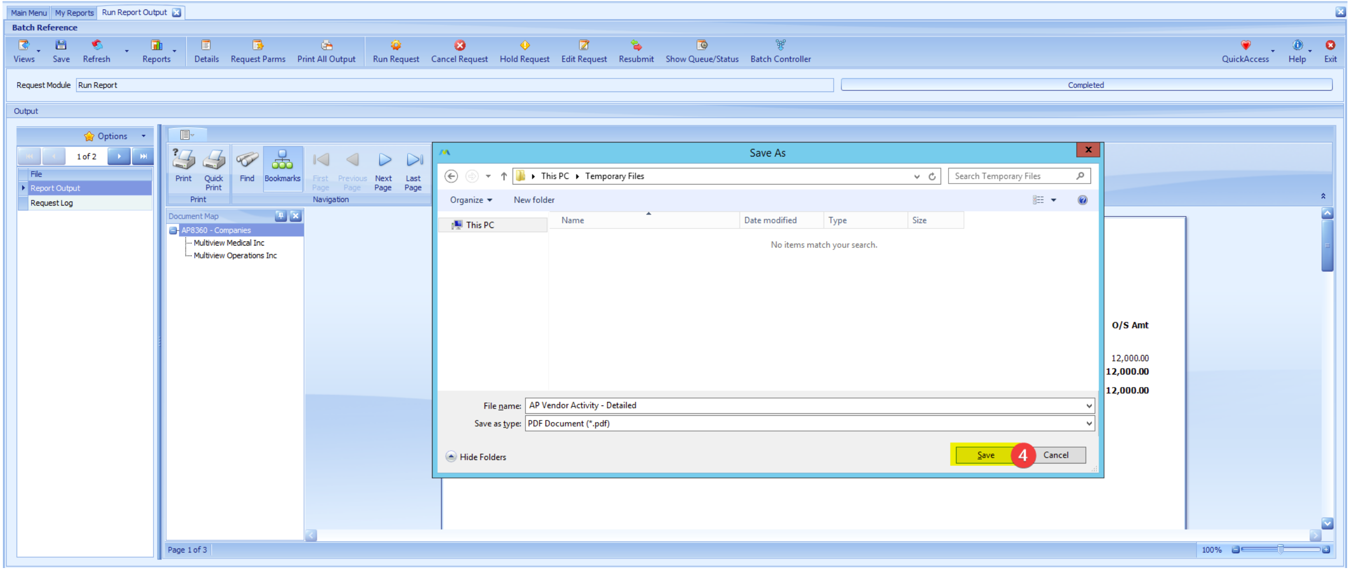
After selecting "OK", Multiview will prompt you to name the file and save it in your Temporary Files folder. The steps are shown below.

Detailed Reports - Basics

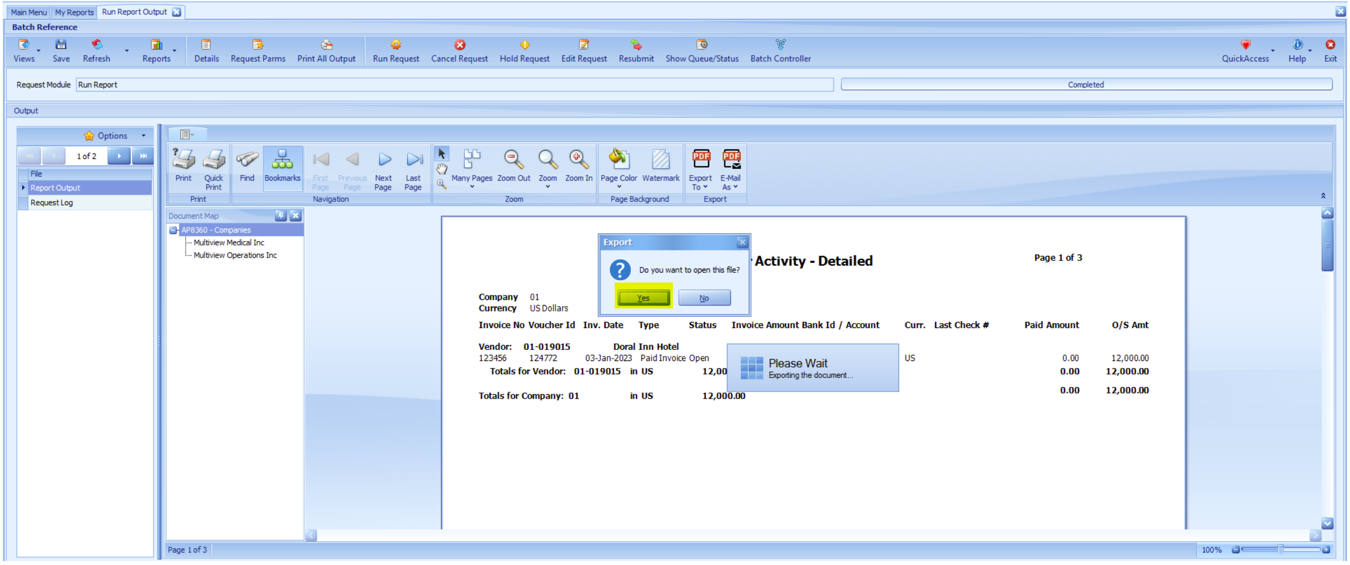
Time: 13:00 - 14:00 Date: Monday, October 16, 2023
Time: 10:00 - 11:00 Date: Tuesday, October 17, 2023





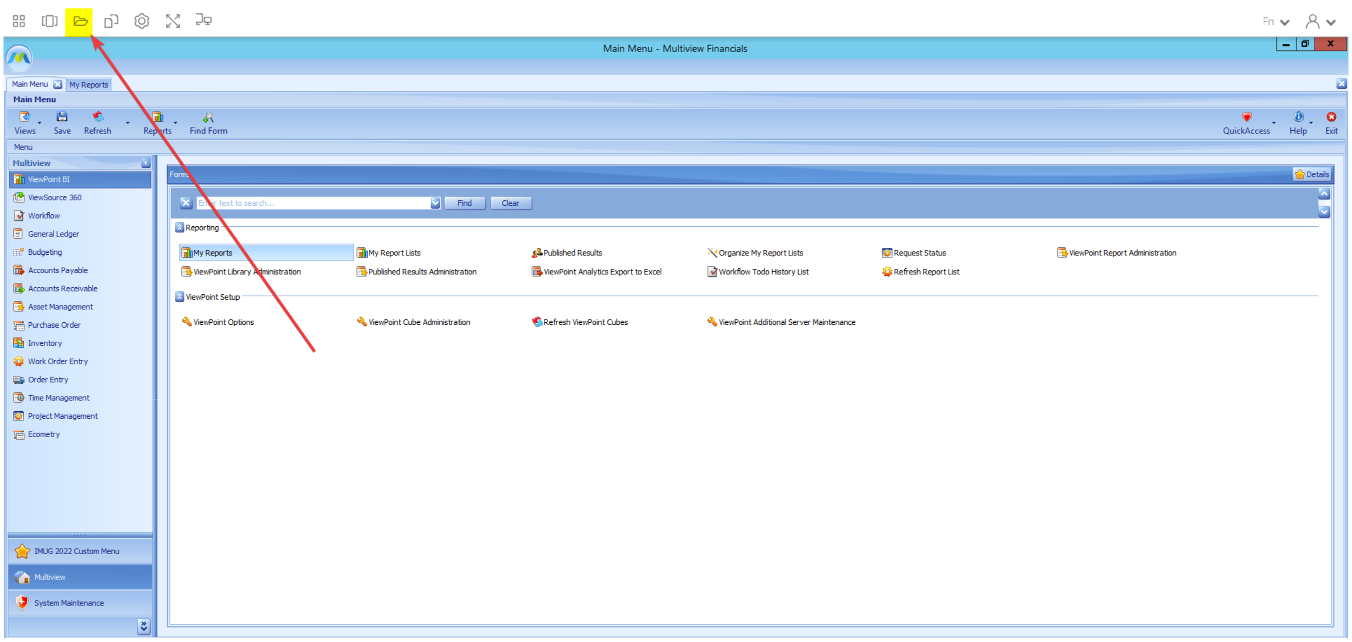


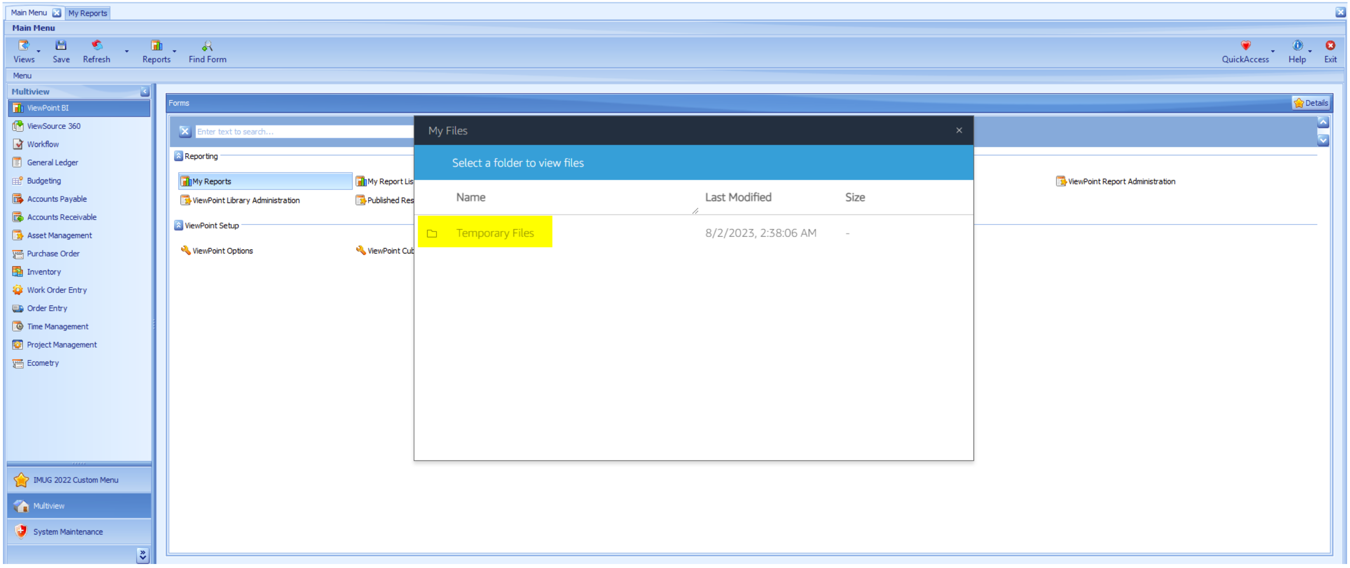
Once saved, Multiview will prompt you to open the file. You can open the export here, or if you have other reports that you would like to export, you can export those as well and retrieve them from your Temporary Files folder.



Opening Files from the Temporary Files Folder

Exported files can be retrieved from the Temporary Files folder by first opening the Temporary Files, then selecting the Temporary Files folder, then selecting the export.





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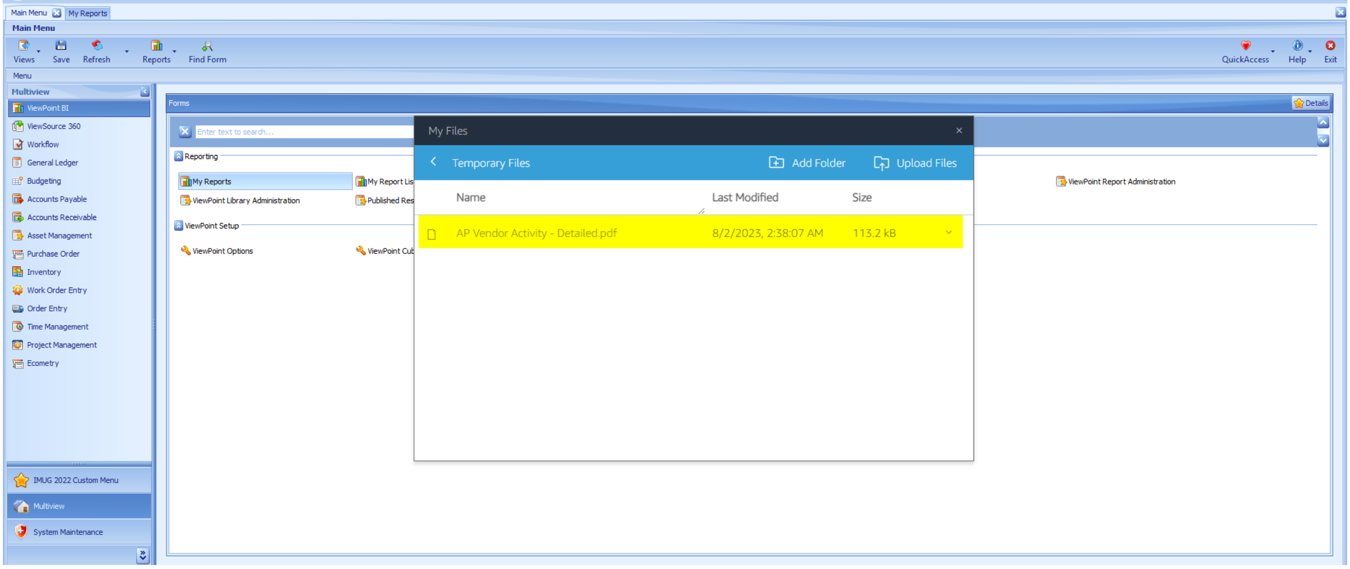
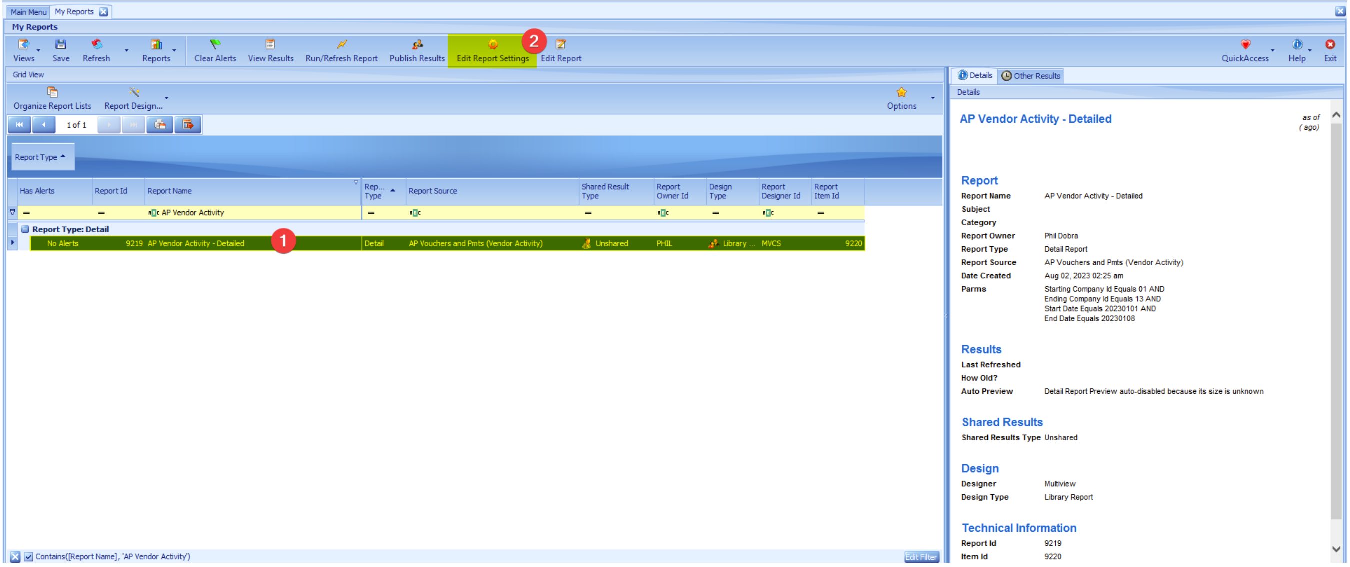
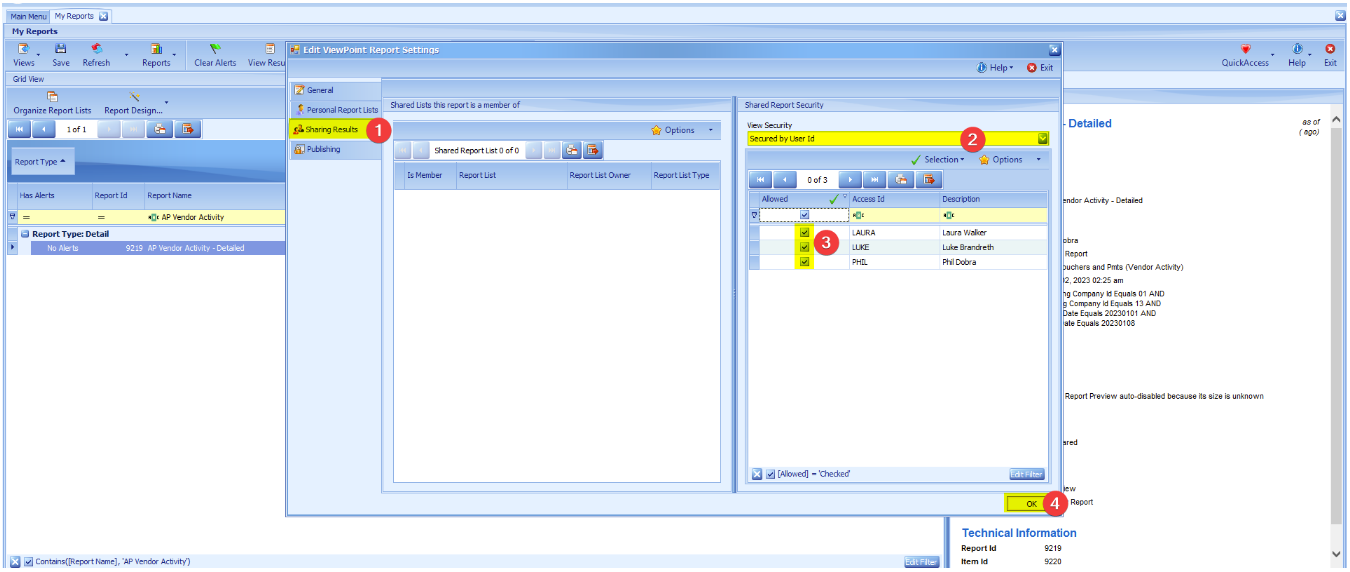


Sharing Reports

After creating a report, it can be shared in various ways. Select the report, then select “Edit Report Settings”.



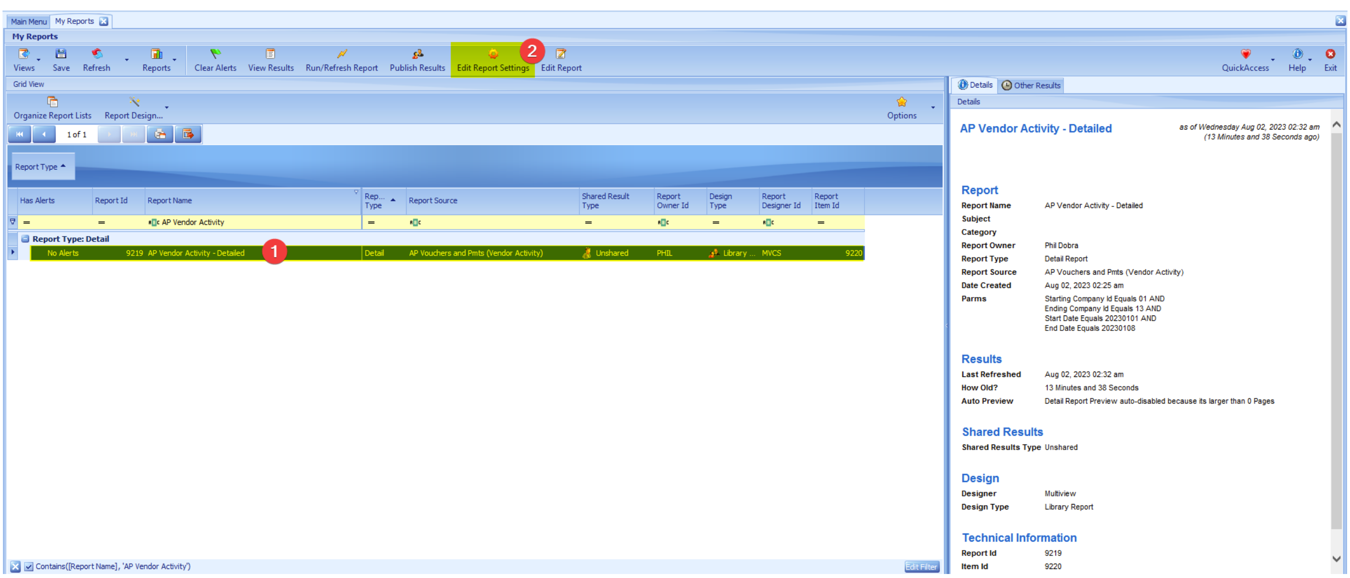
A pop-up will appear allowing you to edit the report. Select “Sharing Results” and select the “View Security” option to choose the security. Reports can be shared by Owner Only, Everyone, Secured by Security Class, Secured by Role, and Secured by User Id. In the example below, I have chosen to share this report by User Id.



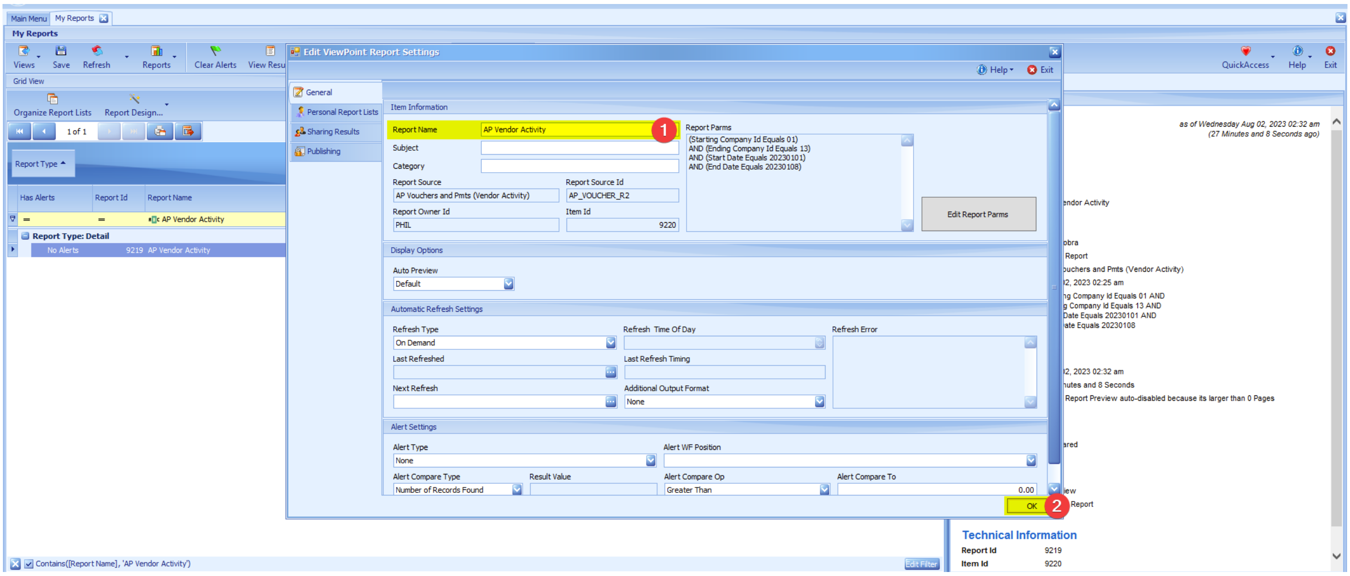
Once you have selected how the report will be shared, select who has access to the report and press "OK". Please note that you must select yourself as a User Id to share to. If not, the report will be shared to the other users that were specified, and not to yourself resulting in you not being able to see the report. After you select "OK", the report will now be available for the specified individuals to view.

Renaming Reports

To rename reports from your My Reports module, select the report and select "Edit Report Settings".

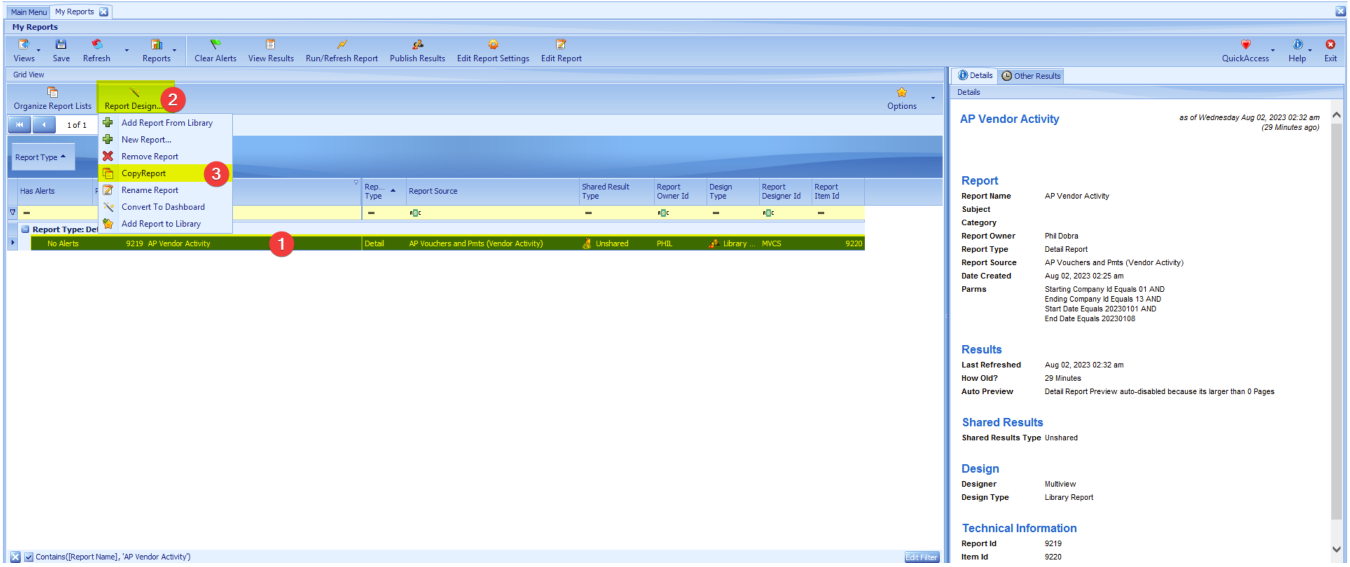


Rename the report and select "OK".

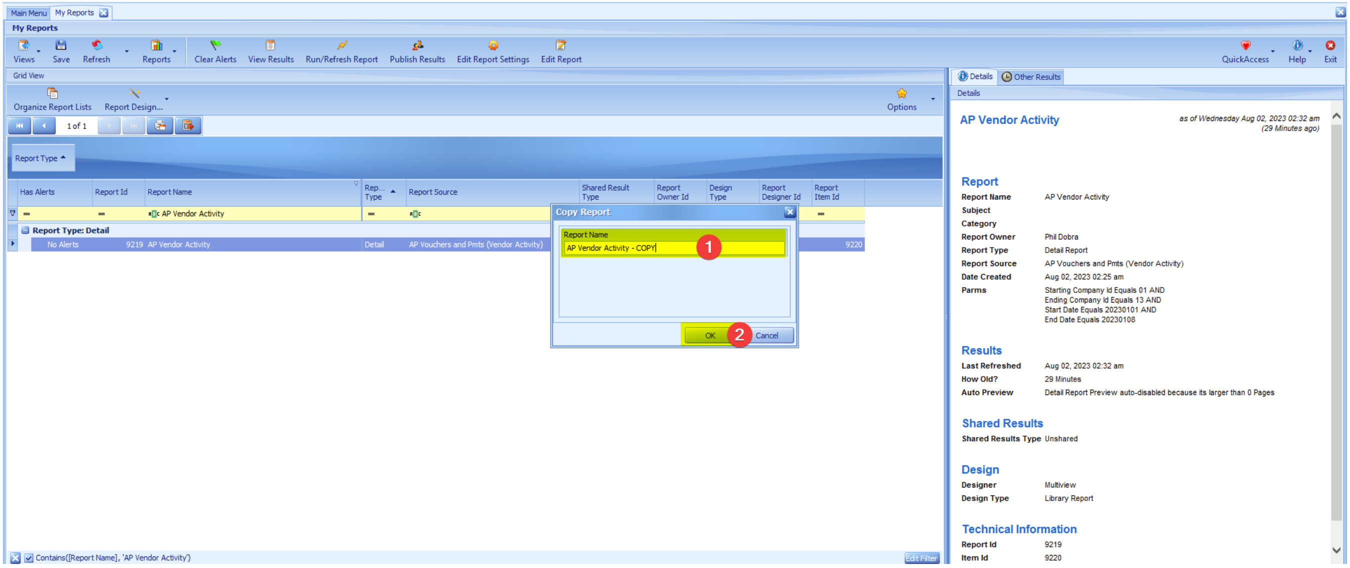


Copying Report

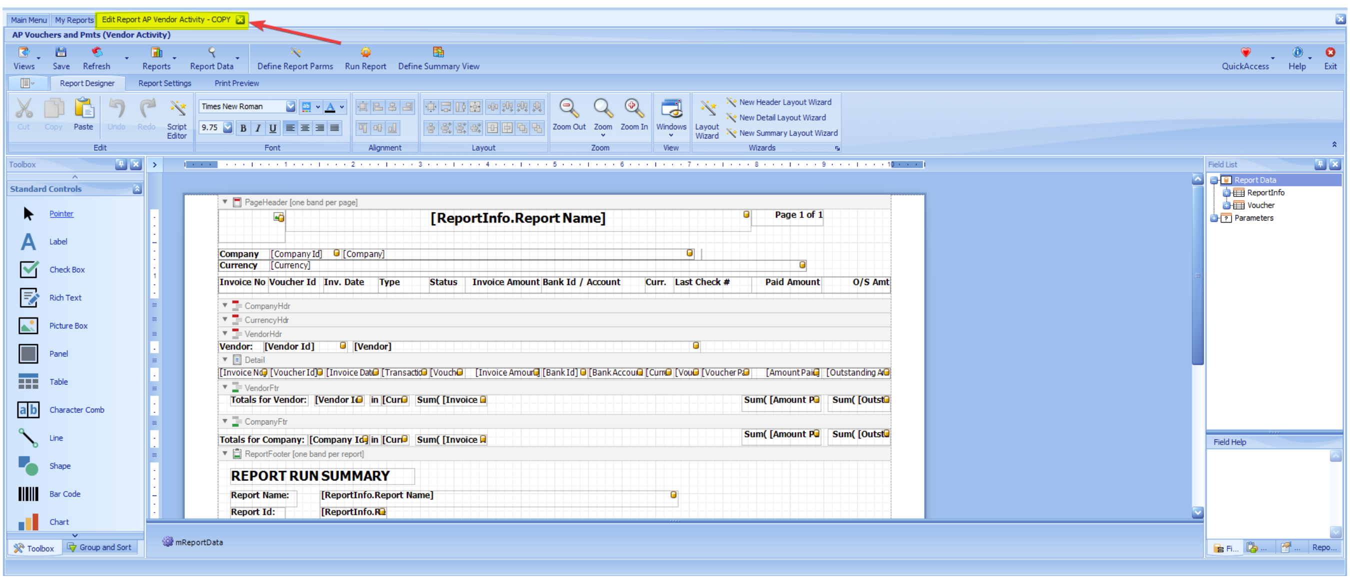
A report can be copied from the My Reports module. This is useful if you would like to edit the report design of an already existing report or would like to have multiple reports to run different queries. To copy a report, select the report, then select “Report Designer”. Select the Copy Report option from the pop-up.



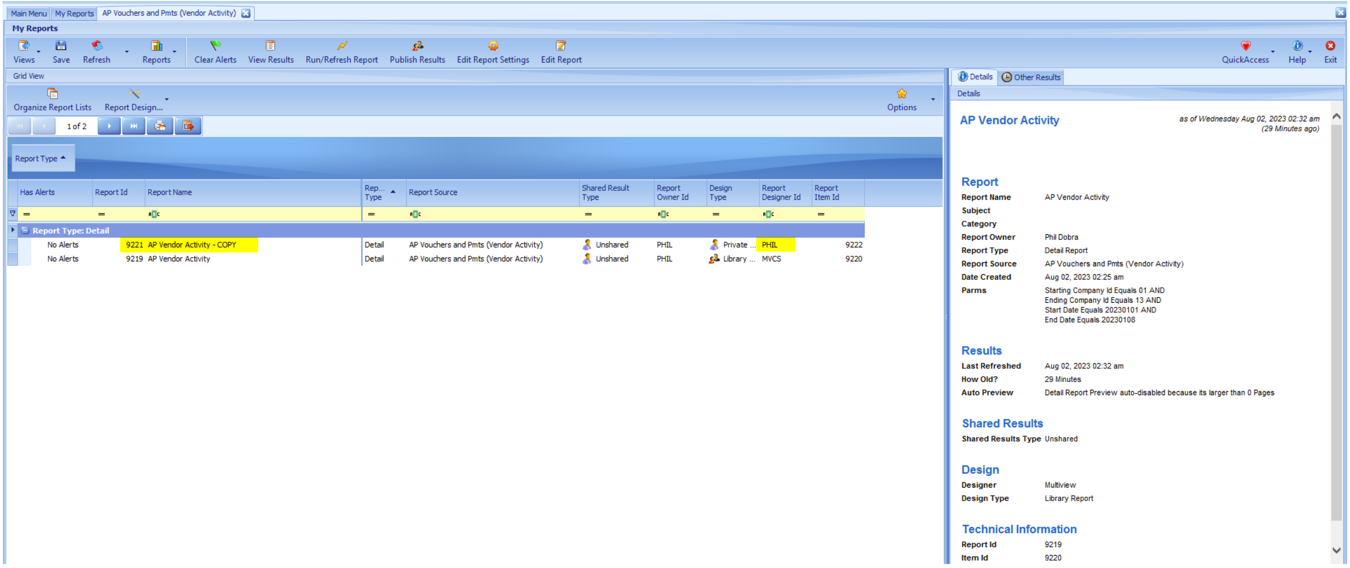
You will receive a prompt to create a name for the report copy. Once you have entered a name, select “OK”.



This action will open the Report Designer for the report copy. If you are satisfied with the design of the report, you can simply close the tab.

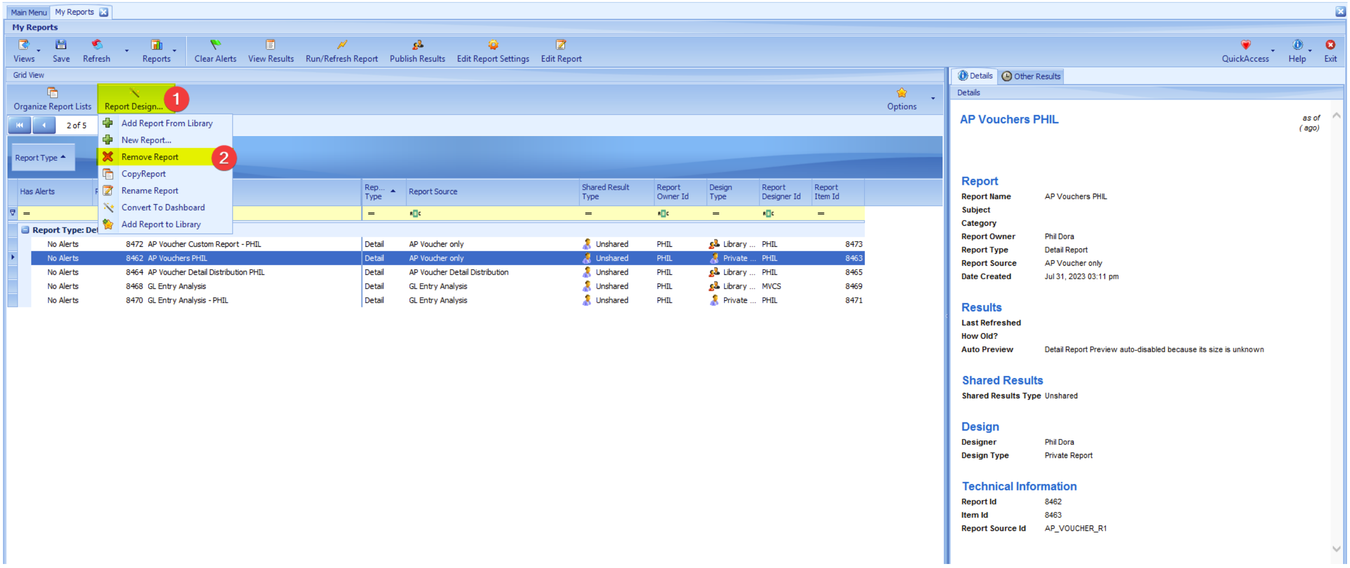


As seen below, a copy of the report has been created. Please note that your User Profile will be the owner of the copied report.



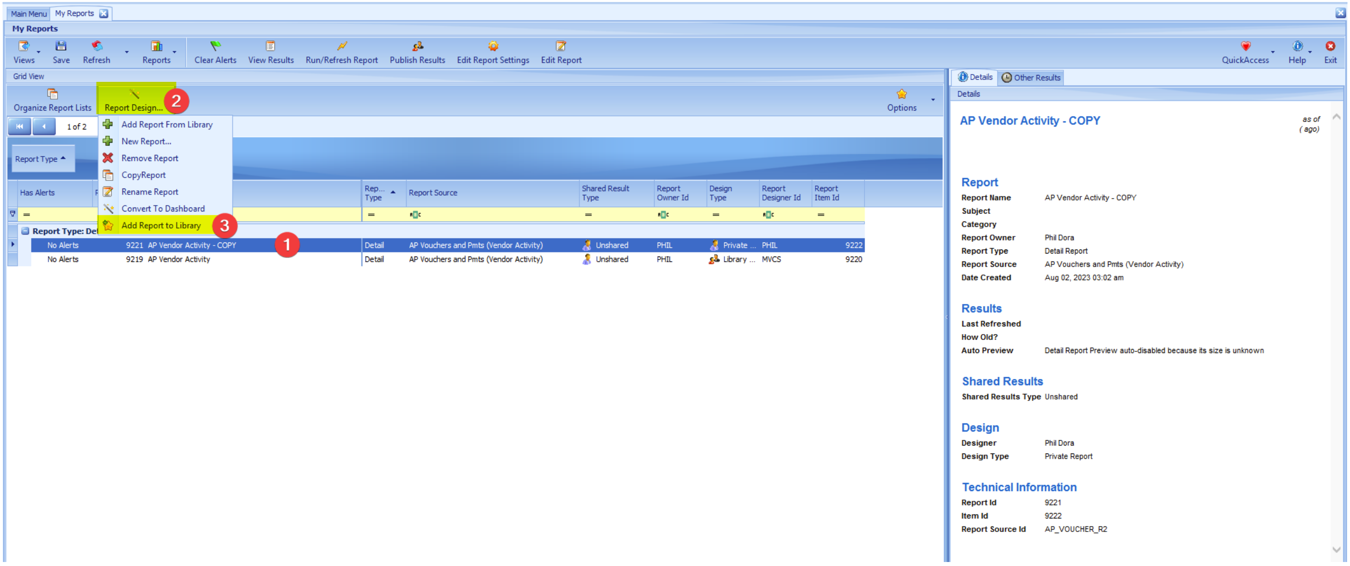
Removing Reports

A report can be removed from the “My Reports” module. Select the report, select “Report Designer” and “Remove Report”.

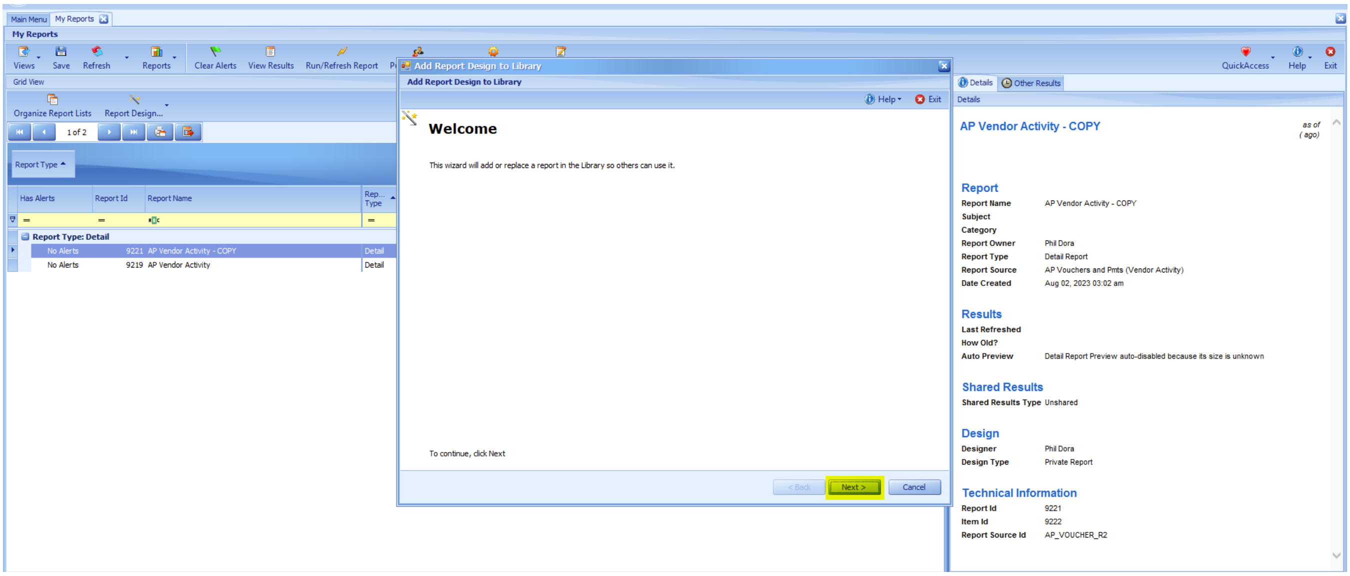


Adding Reports to the Library

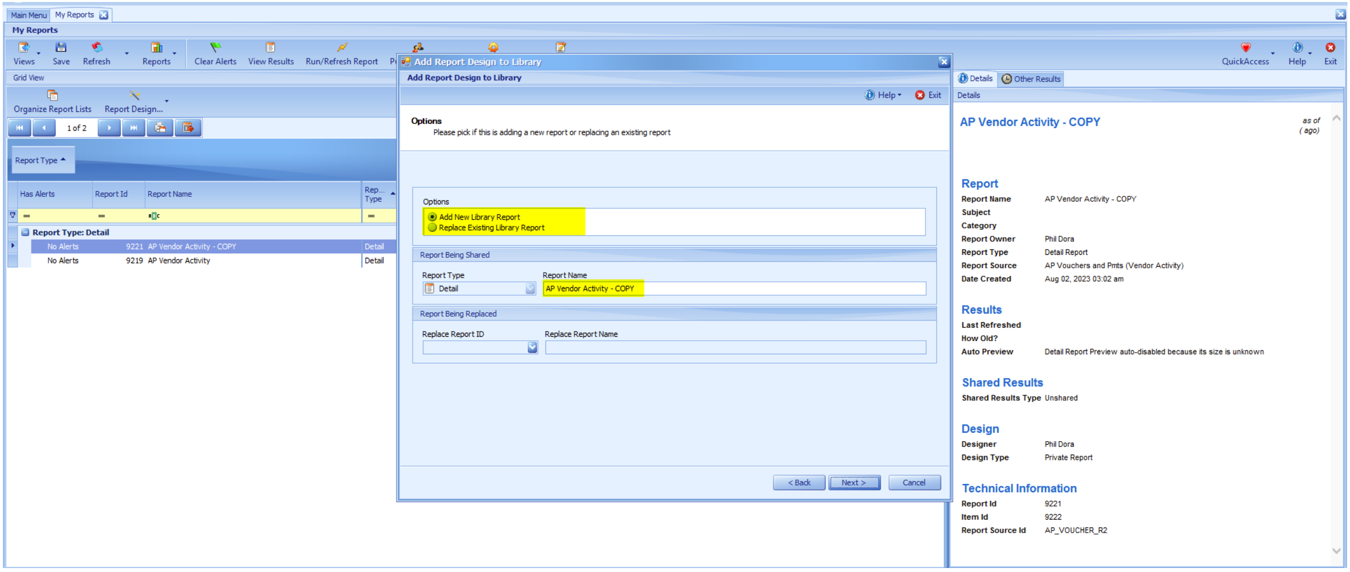
A user can add a report to the Library to share with other users if they are the Report Designer of the report. Select the report, select “Report Designer” and “Add Report to Library”.



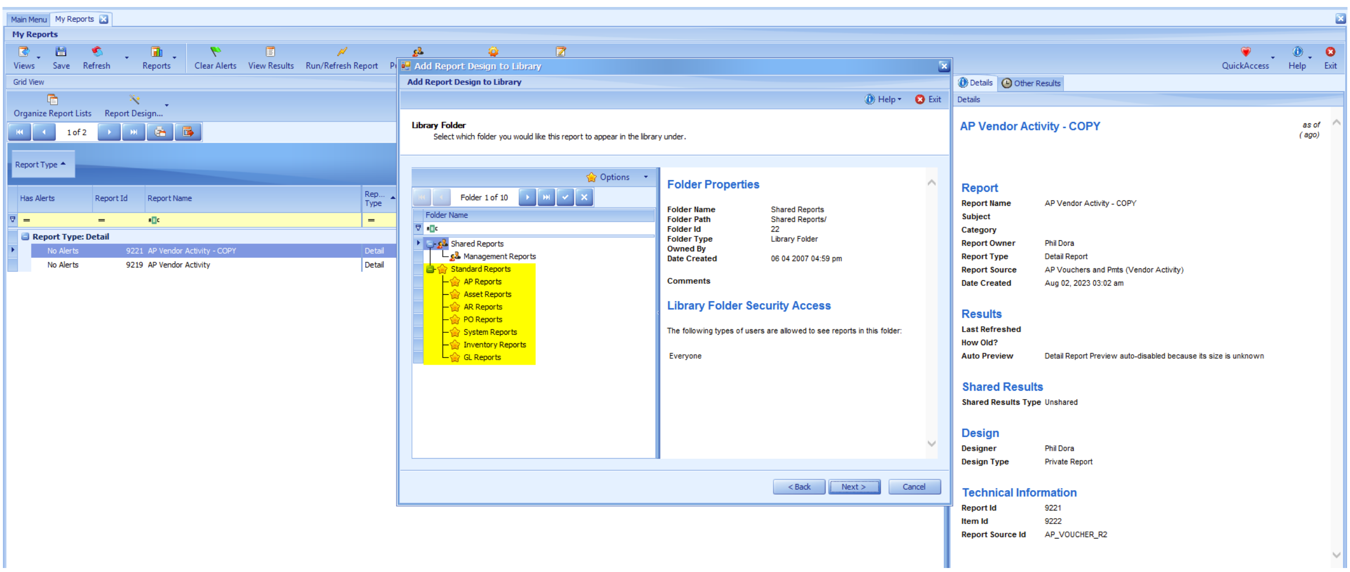
A wizard will appear prompting you to add the report. Select "Next" to begin the process.



First, select if this is a new report or a replacement of an existing Library report. If this is the first time adding this report to the Library, Multiview will default as new. You also have the option to change the report name that will be displayed in the ViewPoint Analytics Library. Click next once ready to proceed.

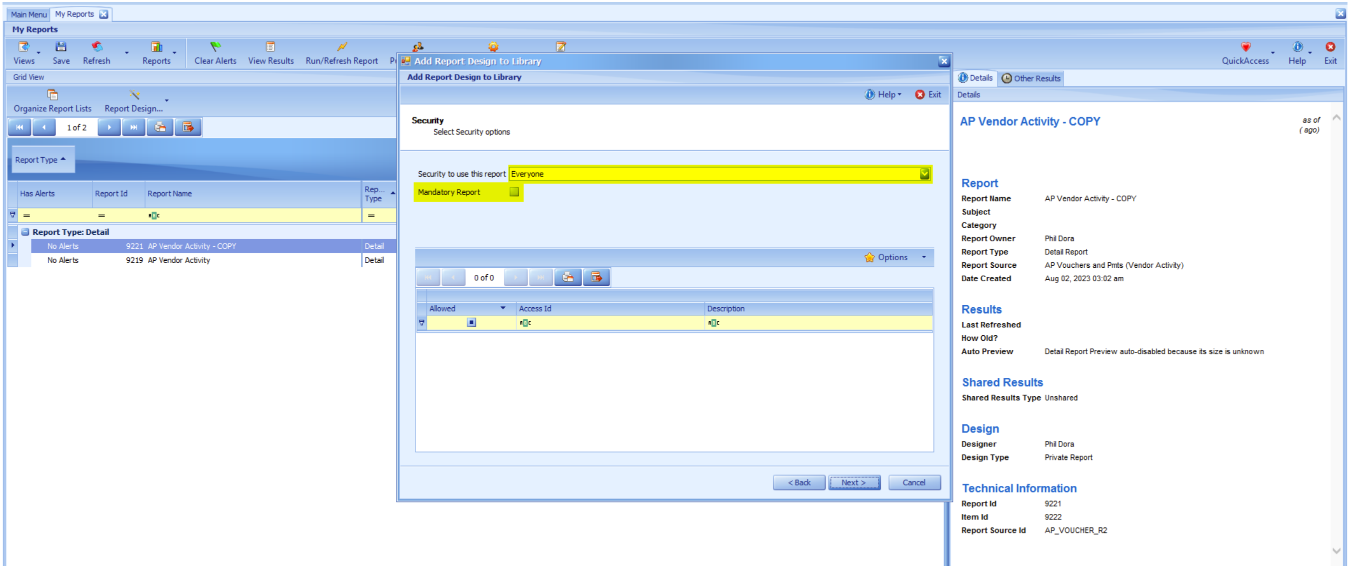


Next, select the folder where the report will be saved and click “Next”.

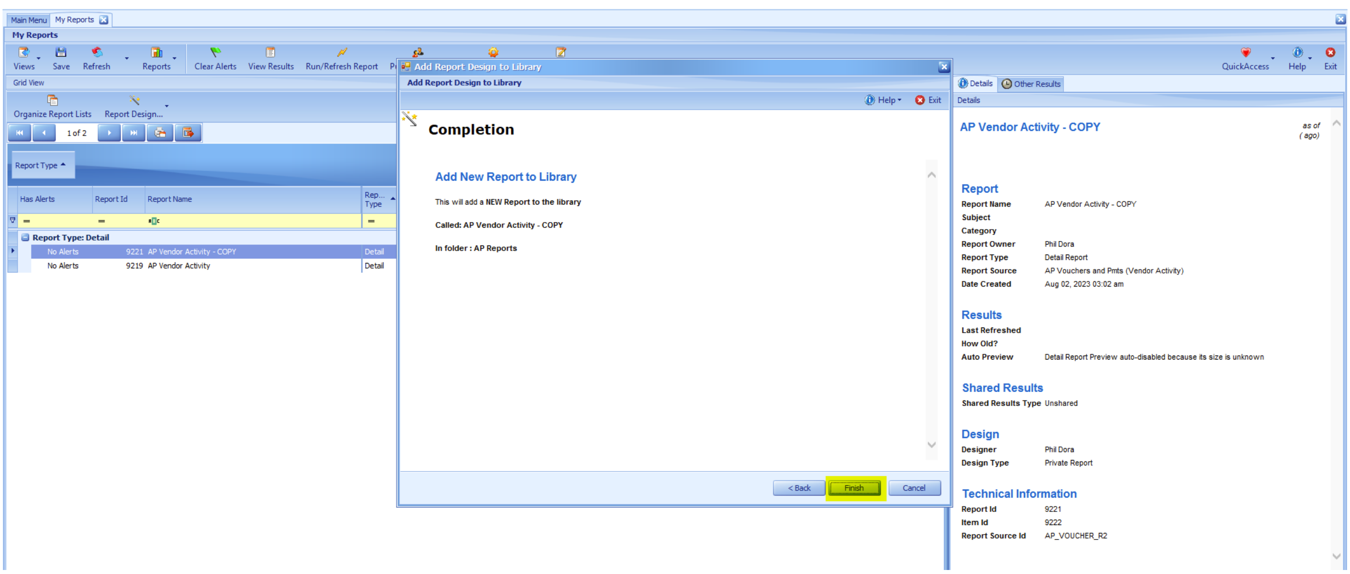


Next, you have the ability to add additional security to this report to restrict who can view/access it from the Library. Select “Security to use this report” for the dropdown of options. If you choose to share this report using an option other than “Everyone”, ensure that your User ID/Role ID is selected so that you can also view the data.

You can select “Mandatory Report” which will force the report onto the “My Reports” module for all users with security access. This option can only be selected if the security is set to any option other than “Everyone”. Once security has been chosen, click “Next” to continue.



Lastly, click “Finish” and the report will be added to the Library.

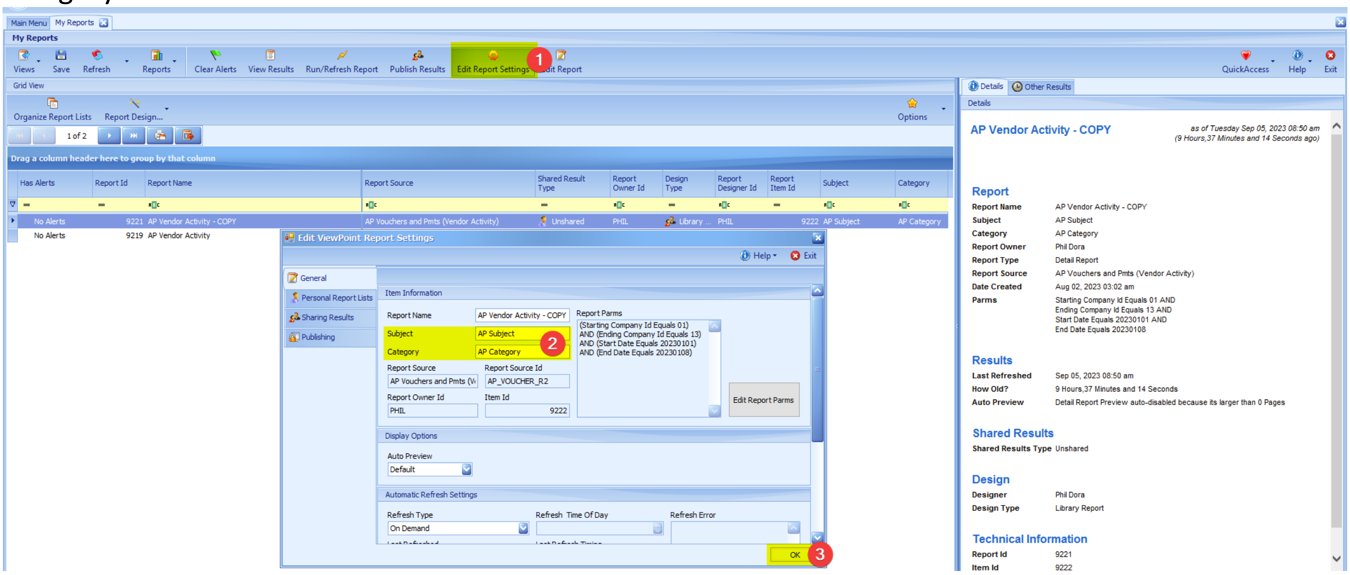


Organizing Reports

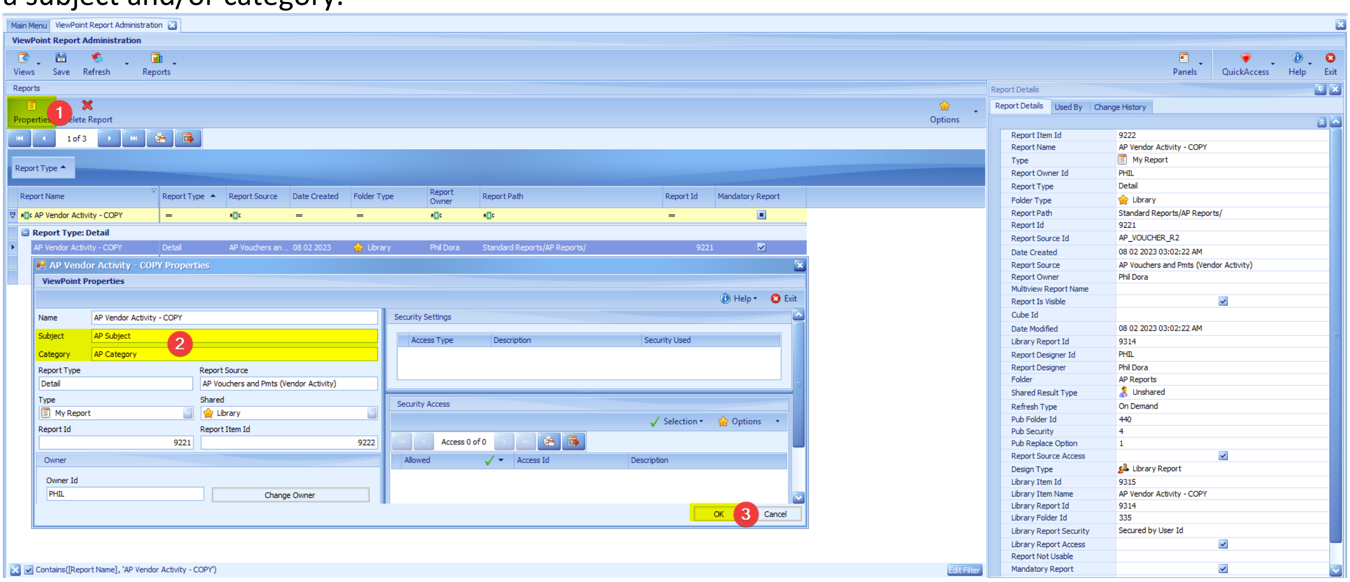
Add a Category and Subject

Folders can be used to organize reports. In “My Reports”, you can add a subject and a category to any report. There are multiple ways to add a subject and/or category on a report. Below are two examples, but similar options exist in other modules when looking at a report’s properties or a report”s settings.

- Select a specific report in “My Reports” and select “Edit Report Settings” to add a subject and/or category.



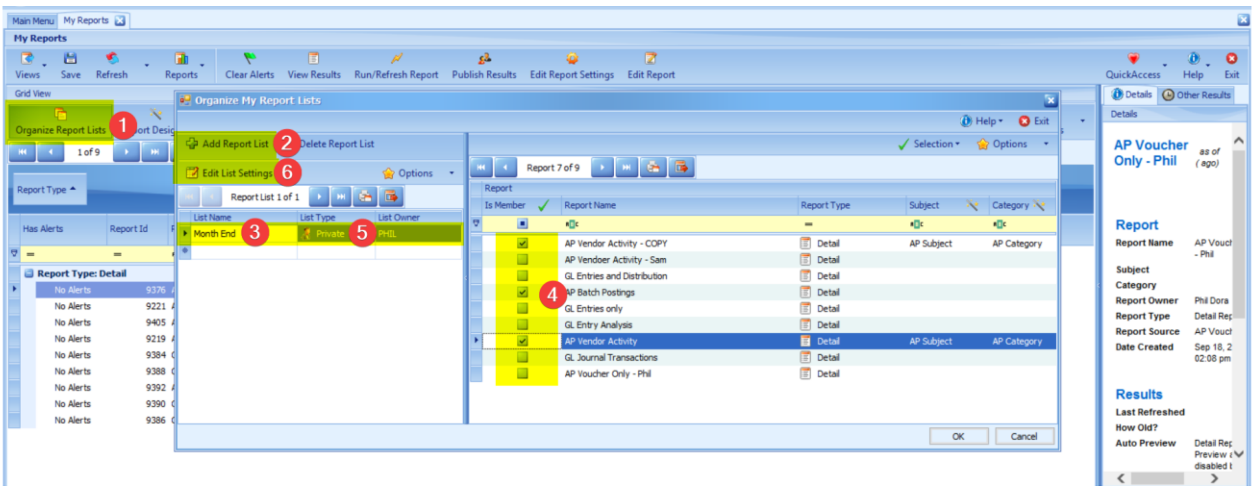
- Select one or more reports in “ViewPoint Report Administration” and select “Properties” to add a subject and/or category.



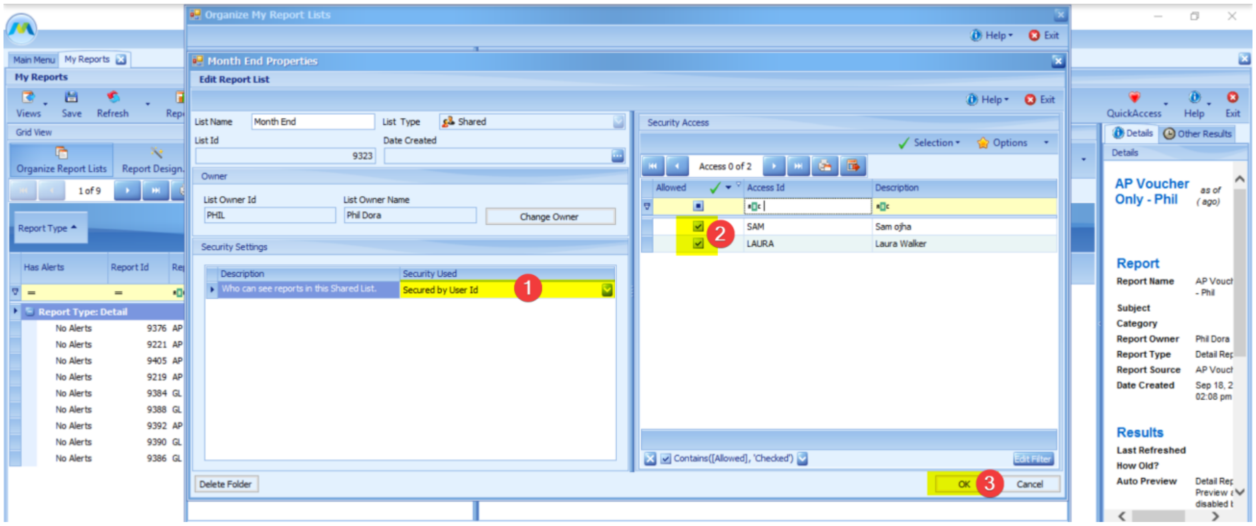
Report Lists

Report lists can be created as private or shared. A Private List groups together your own reports to organize them, or to be able to calculate them all at once using the Refresh Report List feature. A Shared List groups together reports and shares them out to other users. These users will not be able to run/refresh the report on demand. They will only see the most recent results as when the group owner last refreshed the report list. By adding a report to a Shared Report List, included users will have access to the report on their "My Reports" module with a Shared Result Type of "Shared To Me".

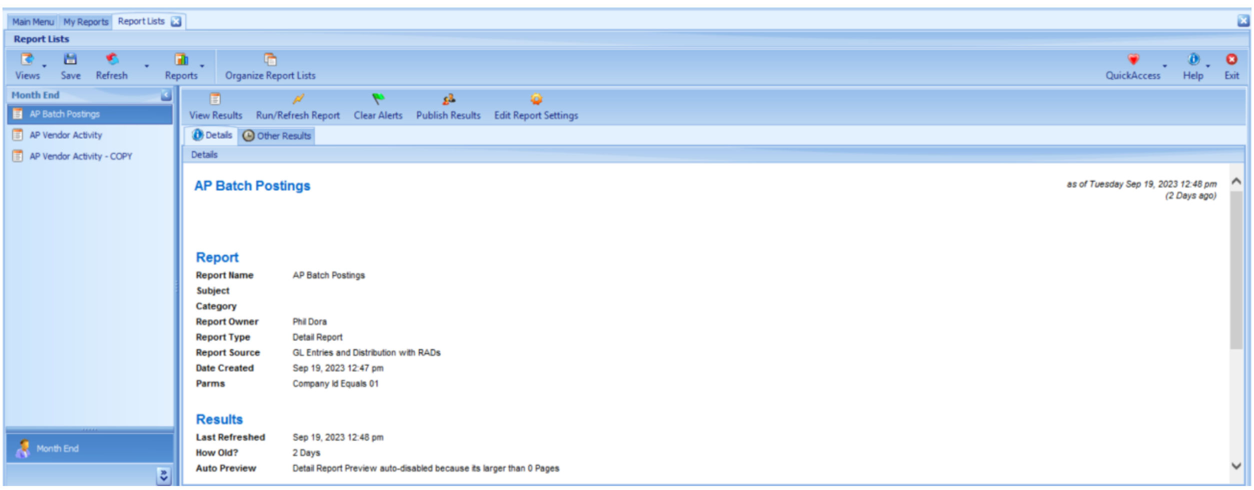
Report Lists are created in Multiview > ViewPoint BI > My Reports. Select "Organize Report Lists" (Step 1). Select "Add Report List" to create a new list and give a name (Step 2). Once named (Step 3), you can select reports to be included in the list (Step 4). Afterwards, you can make the report either private or shared (Step 5). If the report list is shared, select "Edit List Settings" to choose how the report is shared and who will have access (Step 6).



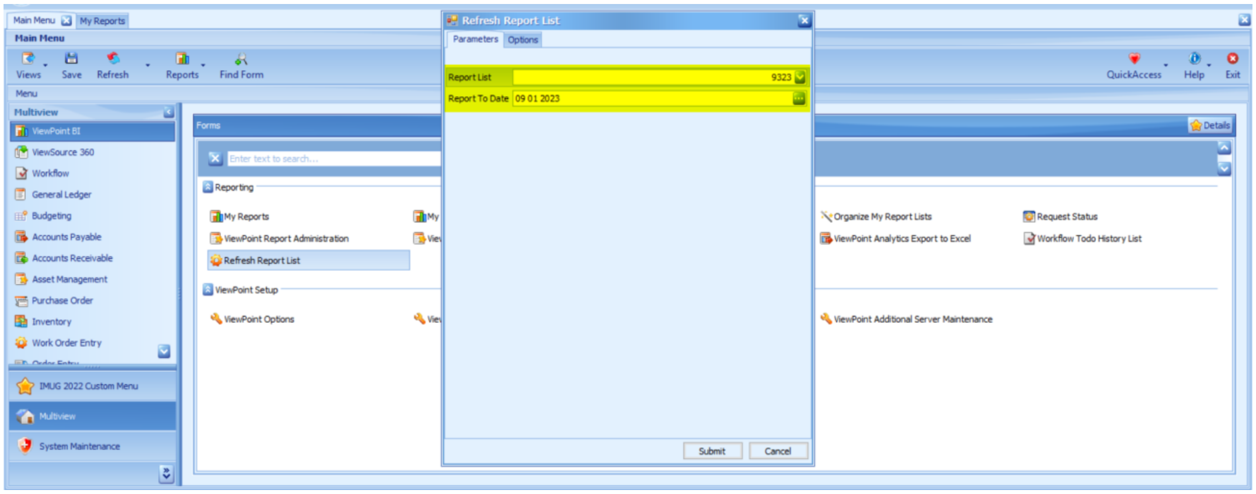
After select "Edit List Settings", select the security used and who has access.



Report Lists can be viewed in Multiview > ViewPoint BI > My Report Lists shown below.

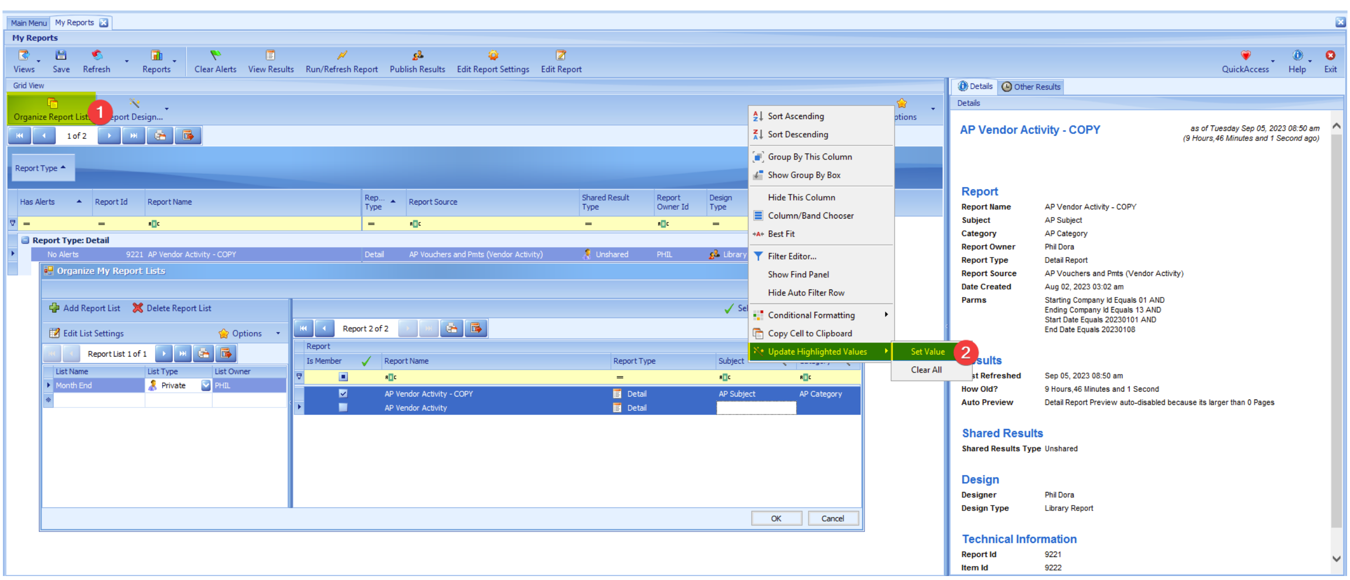


Entire Report Lists can be refreshed in Multiview > ViewPoint BI > Refresh Report Lists. Select the Report List and the date that you would like the reports refreshed. Once set, select "OK" to see the results. Please note that this will only work with Analytic reports.

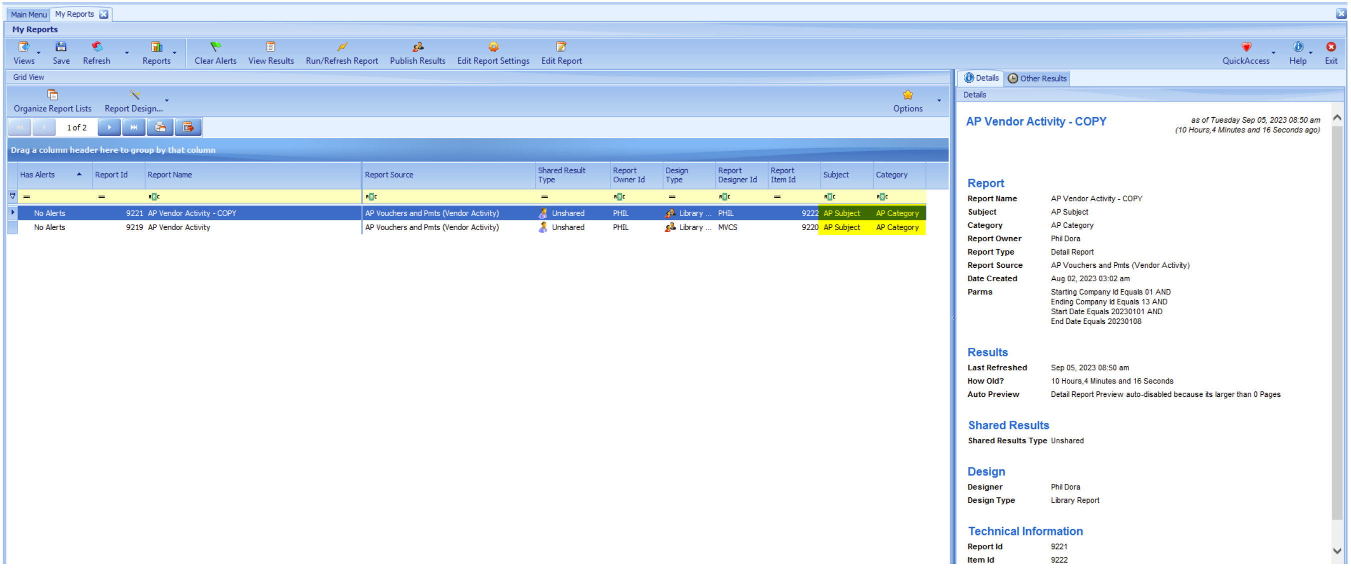


Using Subject & Category with Report Lists

Subjects and/or categories can be used with Report Lists. To mass add a subject and/or category, select "Organize Report Lists" in the "My Reports" module. Use the grid of your reports to select multiple reports by using the Ctrl and Shift button and clicking on the reports you wish to use. Right click on the Subject or Category column heading and select "Updated Highlighted Values" and select "Set Value". Enter the new value and press OK to save changes.



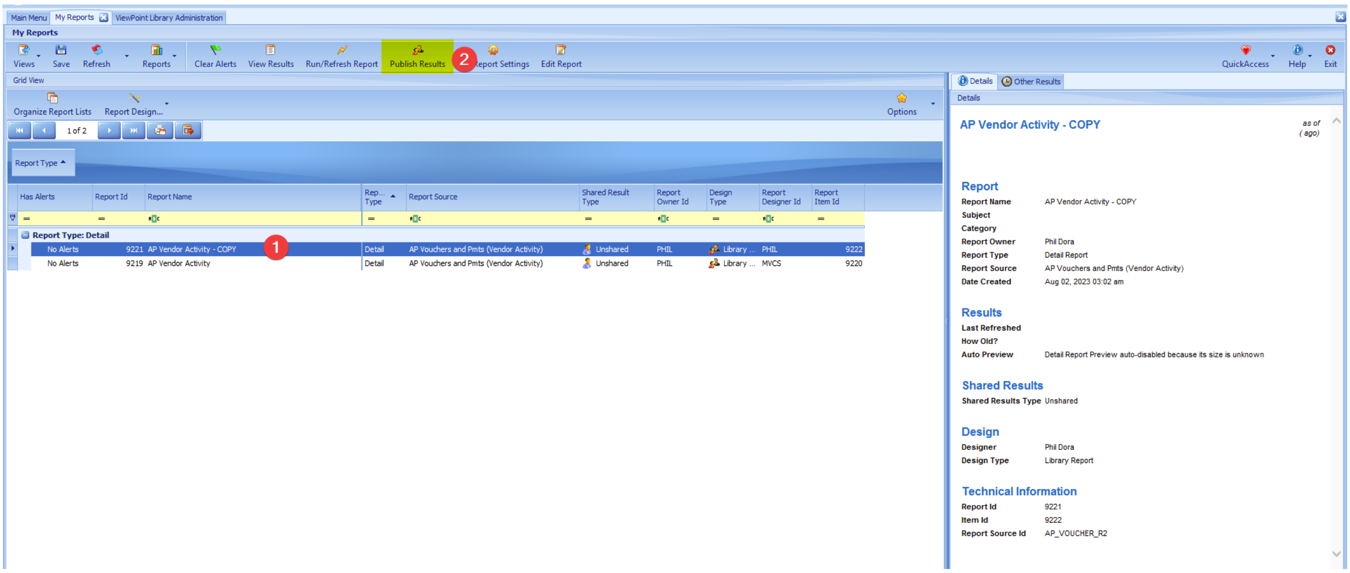
All chosen reports will now display with the new Subject and/or Category.


Main Menu
My Reports
My Reports
Views
Save
Refresh
Reports
Clear Alerts
View Results
Run/Refresh Report
Publish Results
Edit Report Settings
Edit Report
QuickAccess
Help
Exit
Grid View
Organize Report Lists
Report Design...
Options
1 of 2
Drag a column header here to group by that column
Has Alerts | Report Id | Report Name | Report Source | Shared Result Type | Report Owner Id | Design Type | Report Designer Id | Report Item Id | Subject | Category
No Alerts | 9221 | AP Vendor Activity - COPY | AP Vouchers and Pmts (Vendor Activity) | Unshared | PHIL | Library ... | PHIL | 9222 | AP Subject | AP Category
No Alerts | 9219 | AP Vendor Activity | AP Vouchers and Pmts (Vendor Activity) | Unshared | PHIL | Library ... | MVCS | 9220 | AP Subject | AP Category
Details
Other Results
Details
AP Vendor Activity - COPY
as of Tuesday Sep 05, 2023 08:50 am
(10 Hours,4 Minutes and 16 Seconds ago)
Report
Report Name AP Vendor Activity - COPY
Subject AP Subject
Category AP Category
Report Owner Phil Dora
Report Type Detail Report
Report Source AP Vouchers and Pmts (Vendor Activity)
Date Created Aug 02, 2023 03:02 am
Parms Starting Company Id Equals 01 AND
Ending Company Id Equals 13 AND
Start Date Equals 20230101 AND
End Date Equals 20230108
Results
Last Refreshed Sep 05, 2023 08:50 am
How Old? 10 Hours,4 Minutes and 16 Seconds
Auto Preview Detail Report Preview auto-disabled because its larger than 0 Pages
Shared Results
Shared Results Type Unshared
Design
Designer Phil Dora
Design Type Library Report
Technical Information
Report Id 9221
Item Id 9222

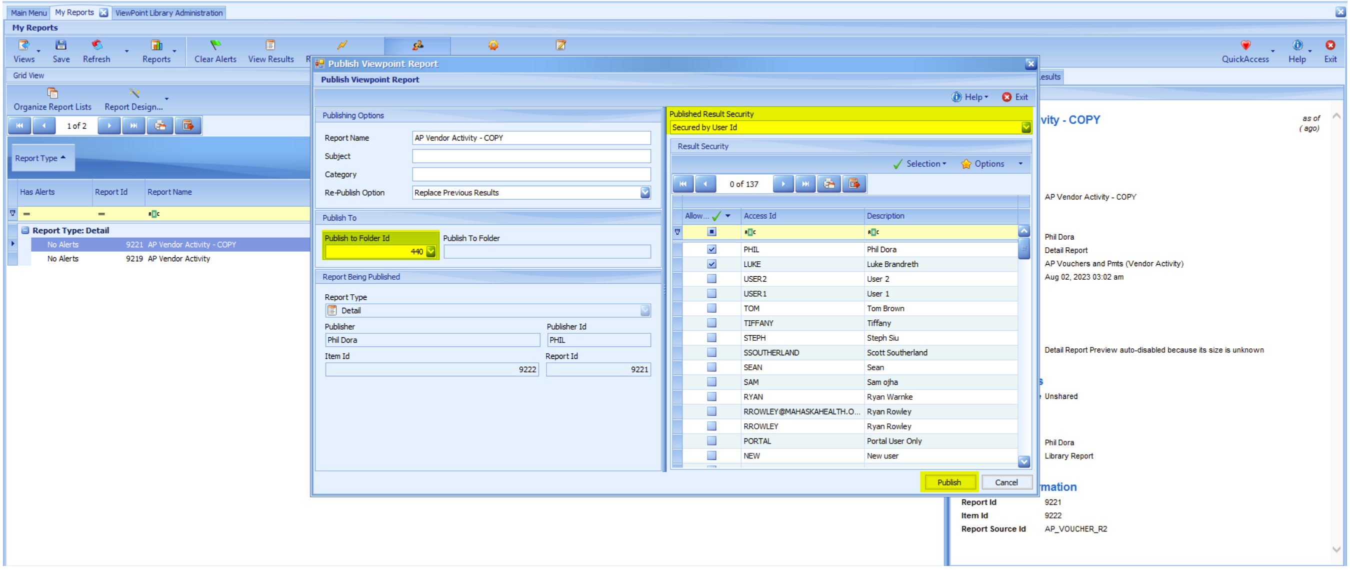
Publishing Reports

Publishing Report Results

Publishing report results will allow users to view report results without making any changes. Navigate to Multiview > ViewPoint BI > My Reports and select the report. Next, select "Publish Results" which will open a new window.

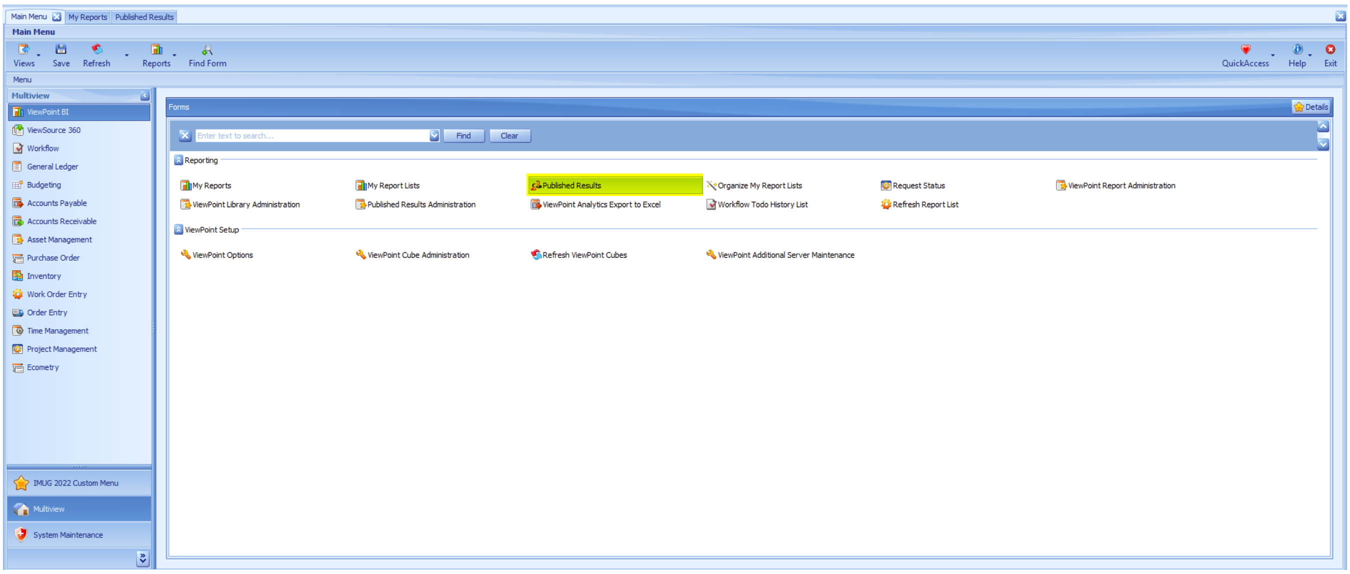


Select the security you would like added to the Published Results and select the Folder ID to select the location. Once set, click "Publish".

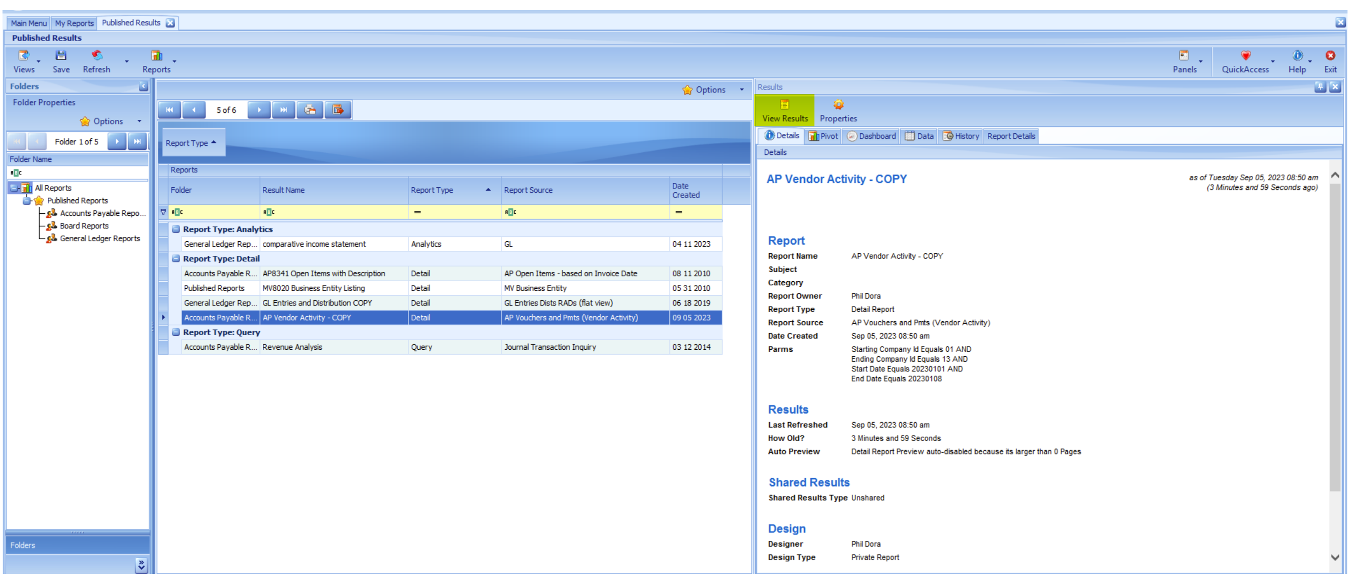


Published Results

Published report results can be viewed in Multiview > ViewPoint BI > Published Results.



Select the report and select “View Results” to see the published results.



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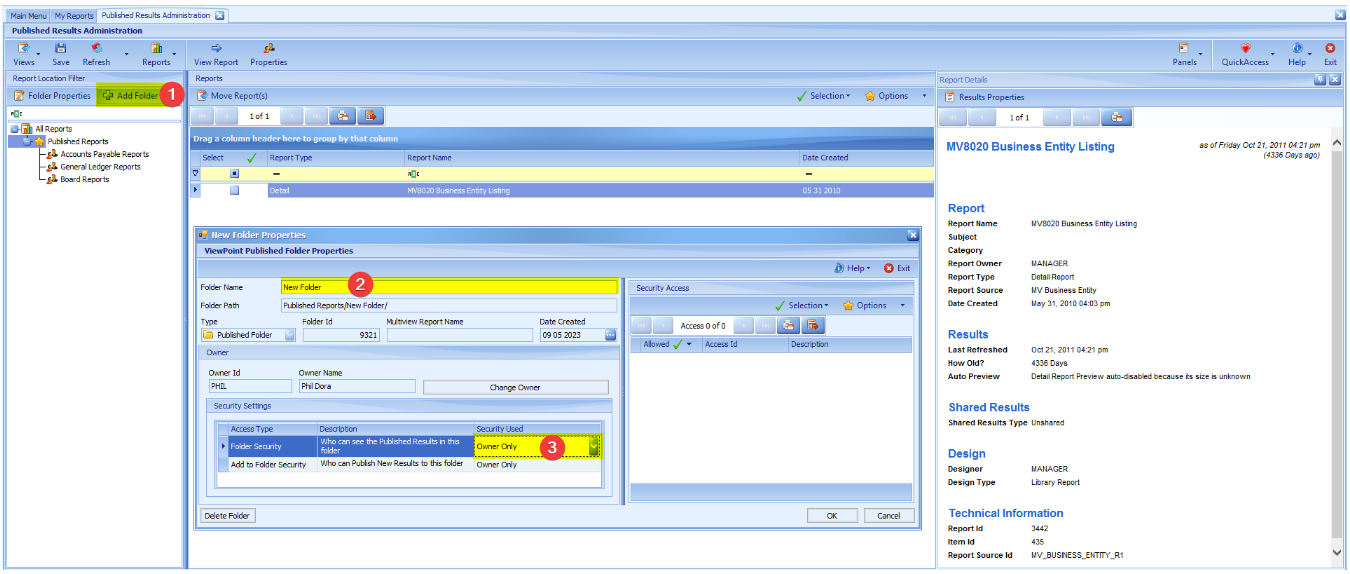
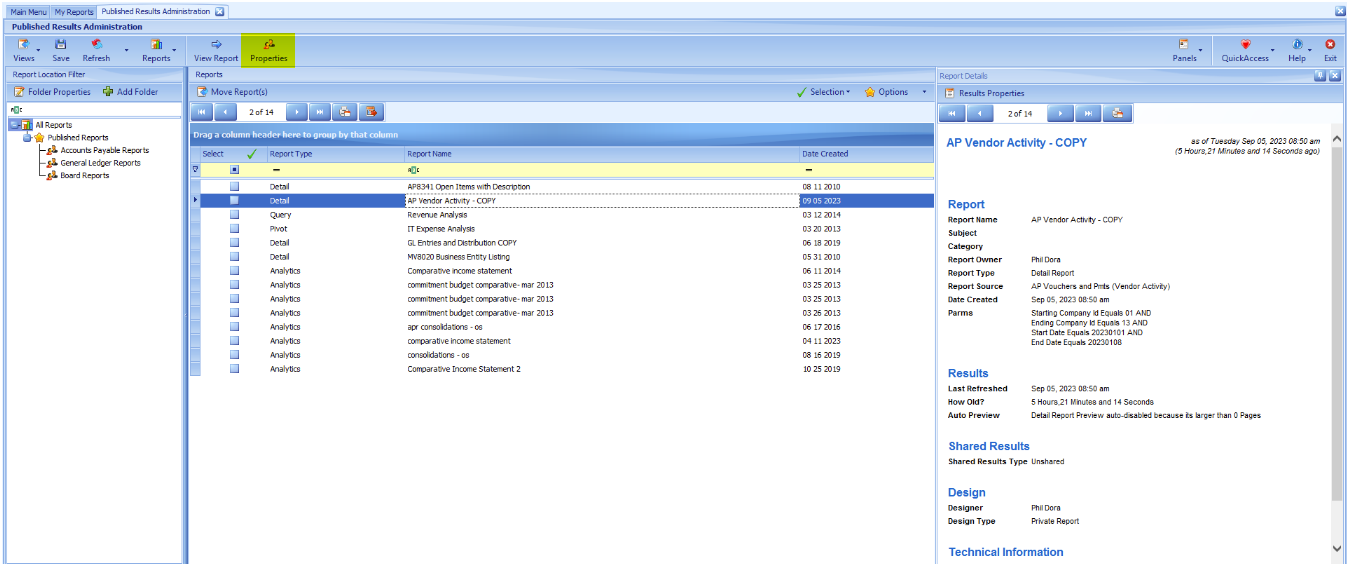
Administration Screens

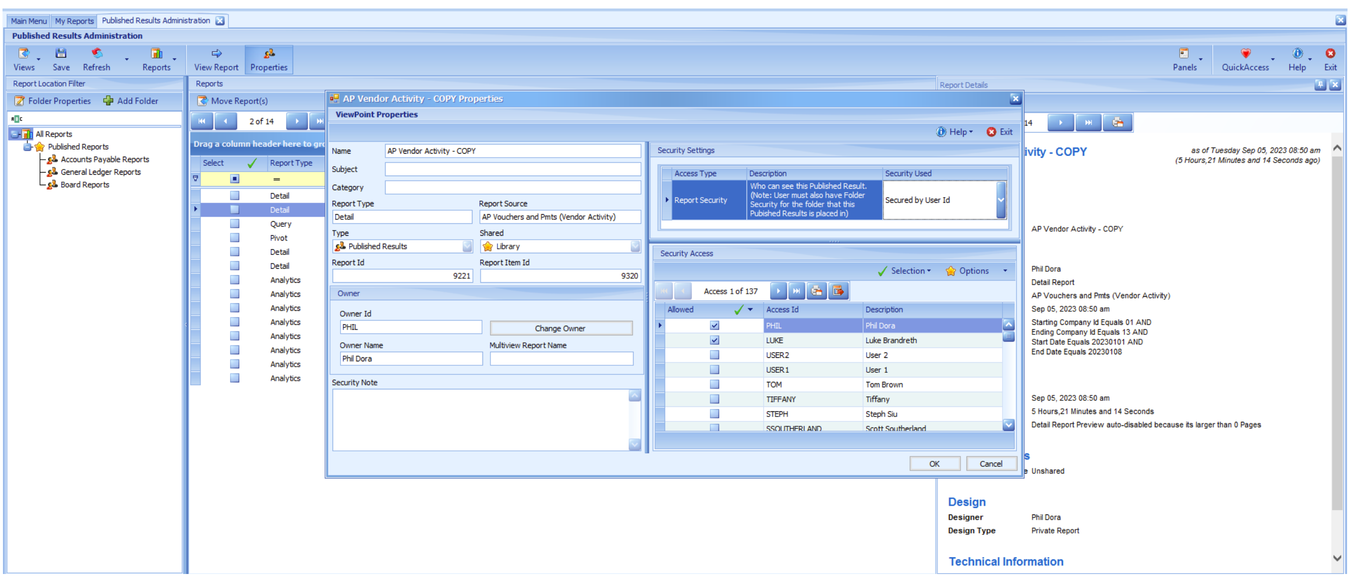
Published Results Administration

All published reports can be seen in Multiview > ViewPoint BI > Published Results Administration. The report will show the last report ran that was published. Users will not have the ability to run their own queries in a published report. This screen will show the reports by folders. You can use this screen to add folders and move reports between folders. To add a folder, select “Add Folder” and add a folder name and assign security as necessary.

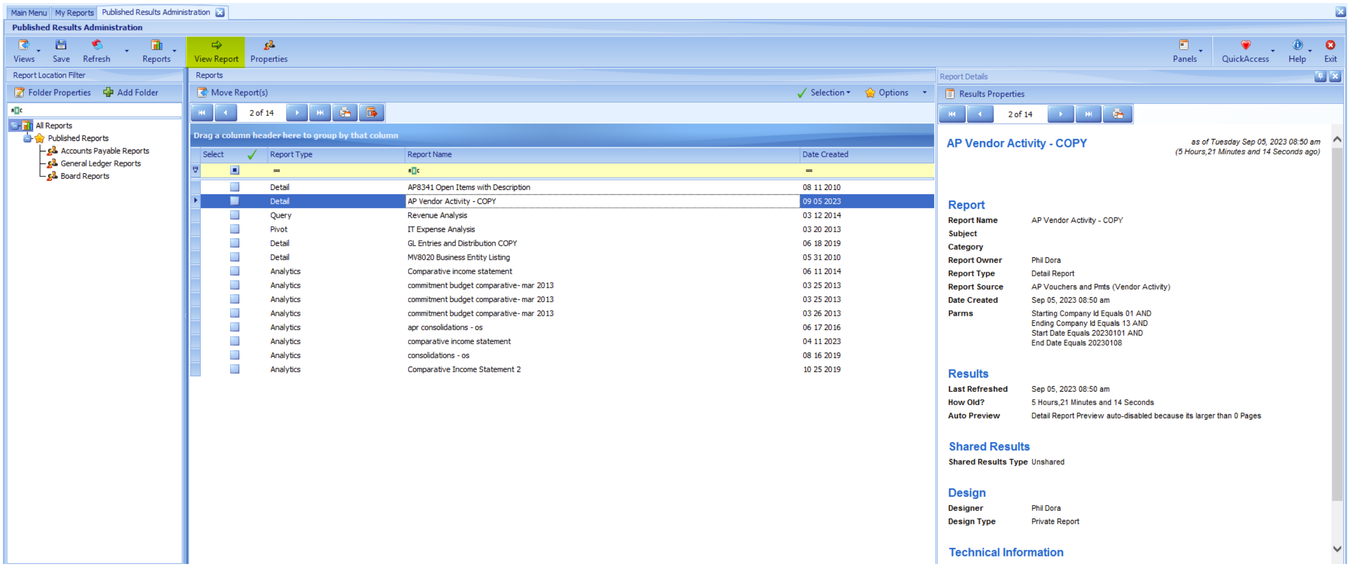


You can edit the Published Report properties by selecting “Properties”. A window will appear allowing you to edit the report security, name, report owner and other information.



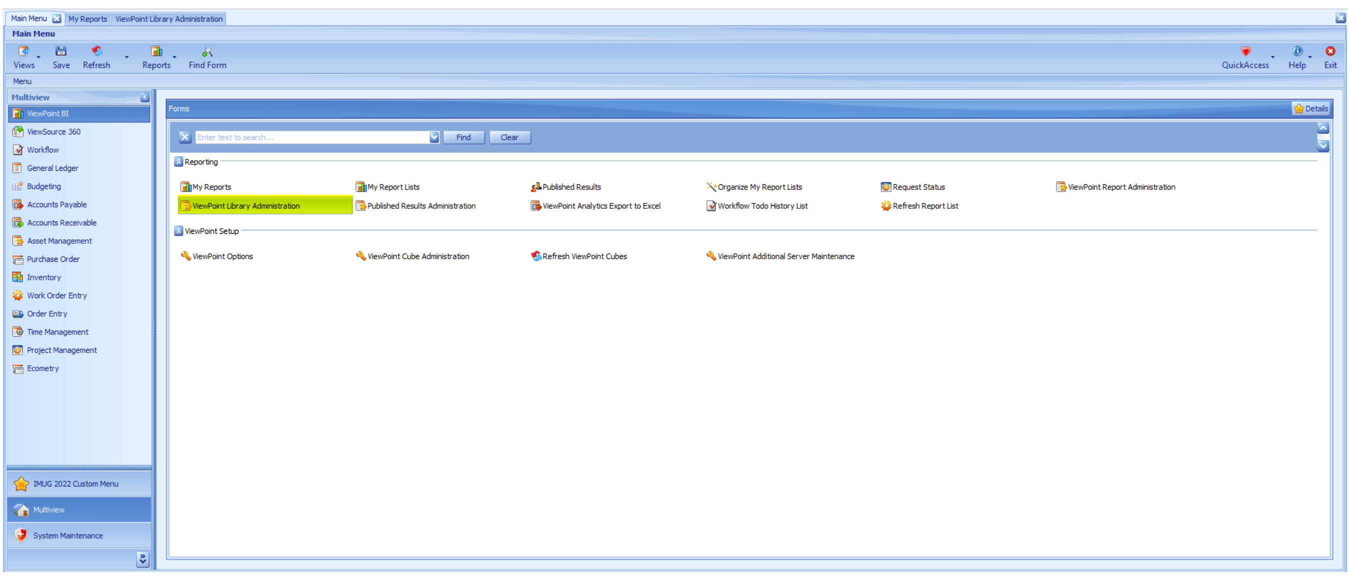


To view the report, select "View Report" and it will show you the last report ran.



ViewPoint Library Administrations

To access the ViewPoint Library Administration, navigate to Multiview > ViewPoint BI > ViewPoint Library Administration.



The Library is the centralized location for all standard reports and other user-created reports that have been added to the Library. The Library is organized in folders by module and shared reports can be found in similar folder organizations that are user-created.

This screen shows you a list of all the reports that are in the library and indicates whether or not they are currently used (i.e. in somebody's "My Reports" screen). You can tell if a report is in use by the "is used" checkbox. If a report is used, you can click on it and go to the "Used By" panel on the right to see which users have this report in their My Reports screen. This is handy if you are thinking of editing or deleting a report since you can see what users would be impacted by the change.

The toolbar houses many other options that are useful when configuring library settings.

- **Delete Library Report** – This button will delete reports from specific folders.

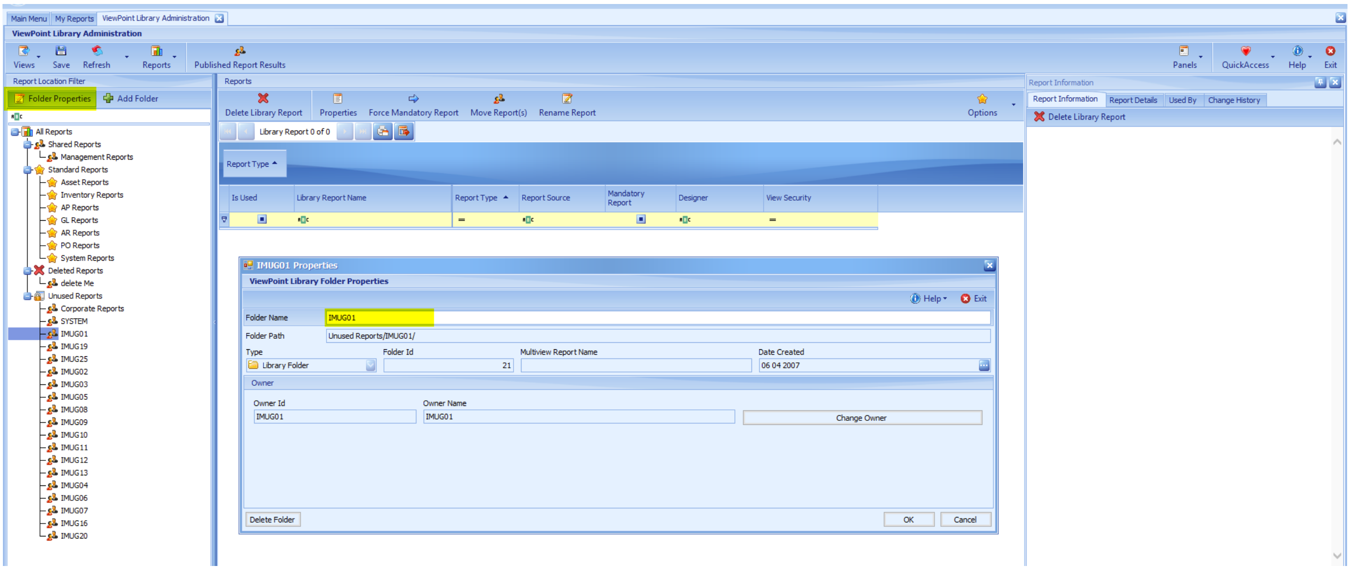
- **Properties** – This button will open a new window that will look similar to those that we've seen before. Here, we can modify the name, subject and category. We can also change the security and the report owner. This is helpful if modifications to the report need to be made, but the report owner is out of office, or no longer works for the company. We are able to come in here and adjust the owner so that another user has the same access.

- **Force Mandatory Report** – This button is similar to the one we saw when sharing reports to the library. This button will force reports to the library of all users who have the necessary security clearance. Please note that the report must be added as a Mandatory Report when adding to the library. If it has not already been added as a Mandatory Report, have the Report Owner re-add it the Library from the "My Reports" module.

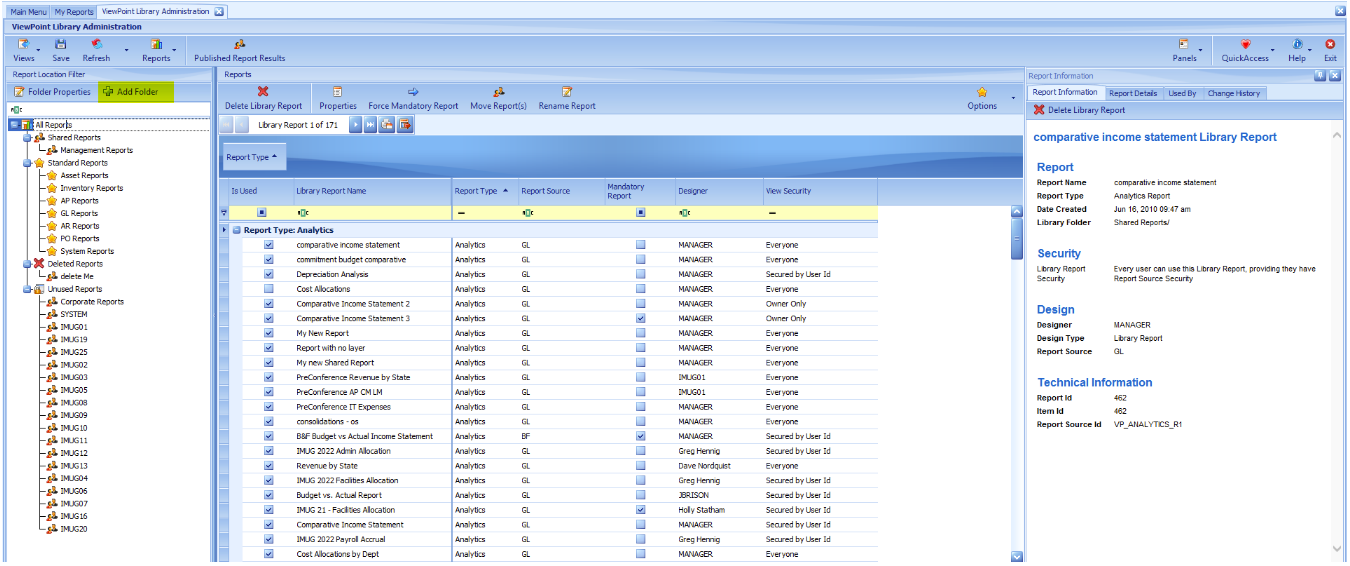
- **Move Reports** – This button allows us to move reports from one folder to another.

- **Rename Report** – This button is another location where we can rename a report.

User created folders can be renamed by selecting "Folder Properties" and changing the name. Afterwards, select "OK" and the folder name will change.

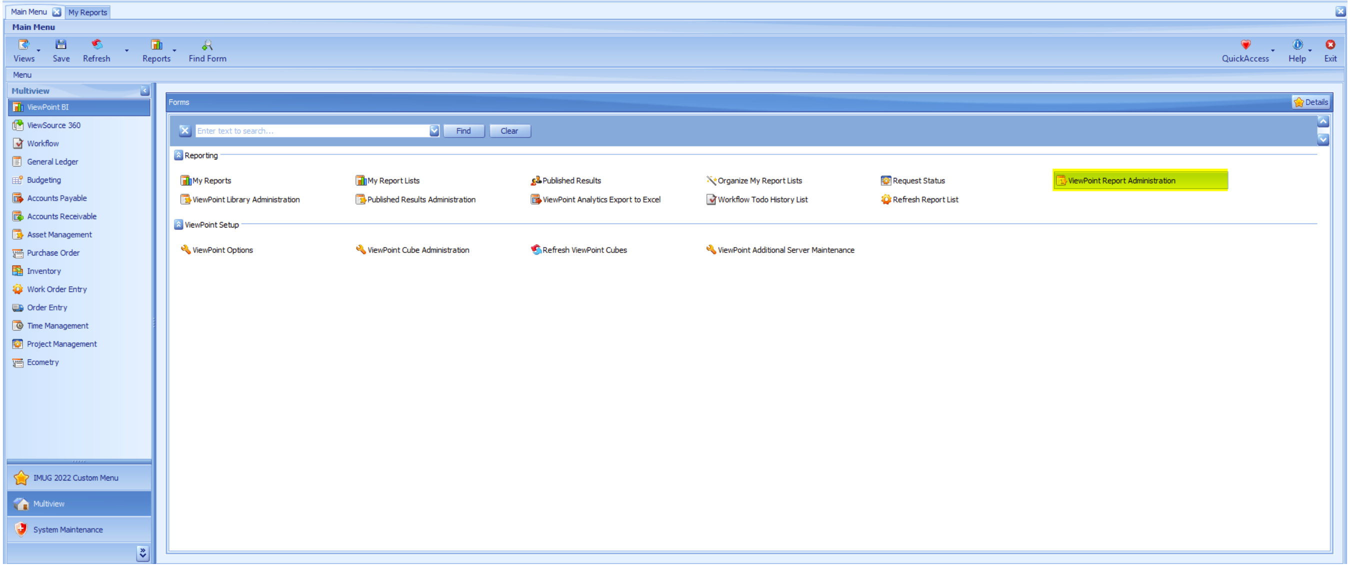


Folders can be created to organize reports by selecting "Add Folder". Once you create a name and press "OK", you can then drag and drop reports from the Library into the folder for easy sorting.

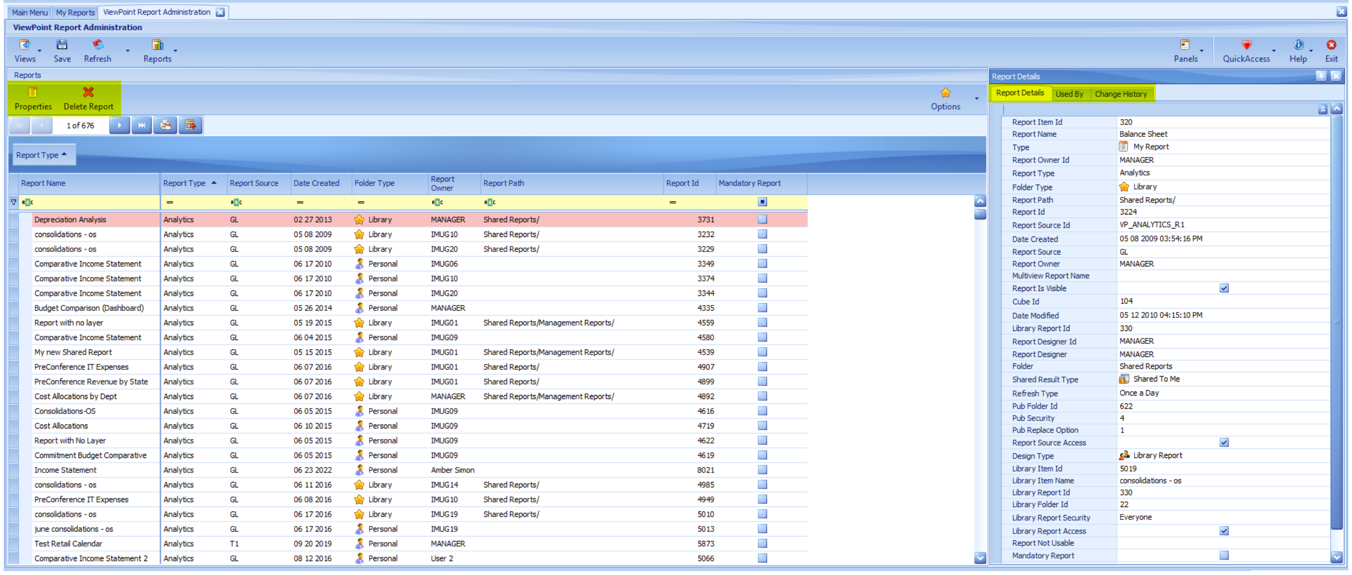


ViewPoint Report Administration

Navigate to Multiview > ViewPoint BI > ViewPoint Report Administration to see a full list of all reports. This includes standard Multiview reports, reports added to the library and personal reports that have not been added to the library.



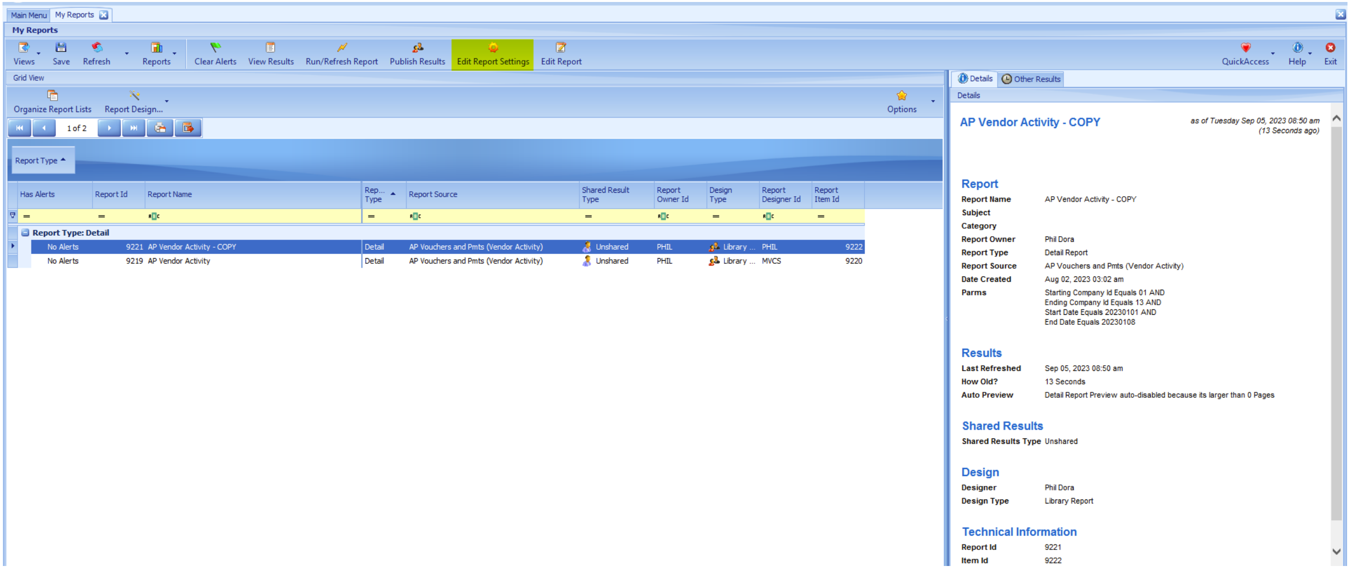
In this module, you can delete reports, change report properties, see report details, view users of the report and view change history.



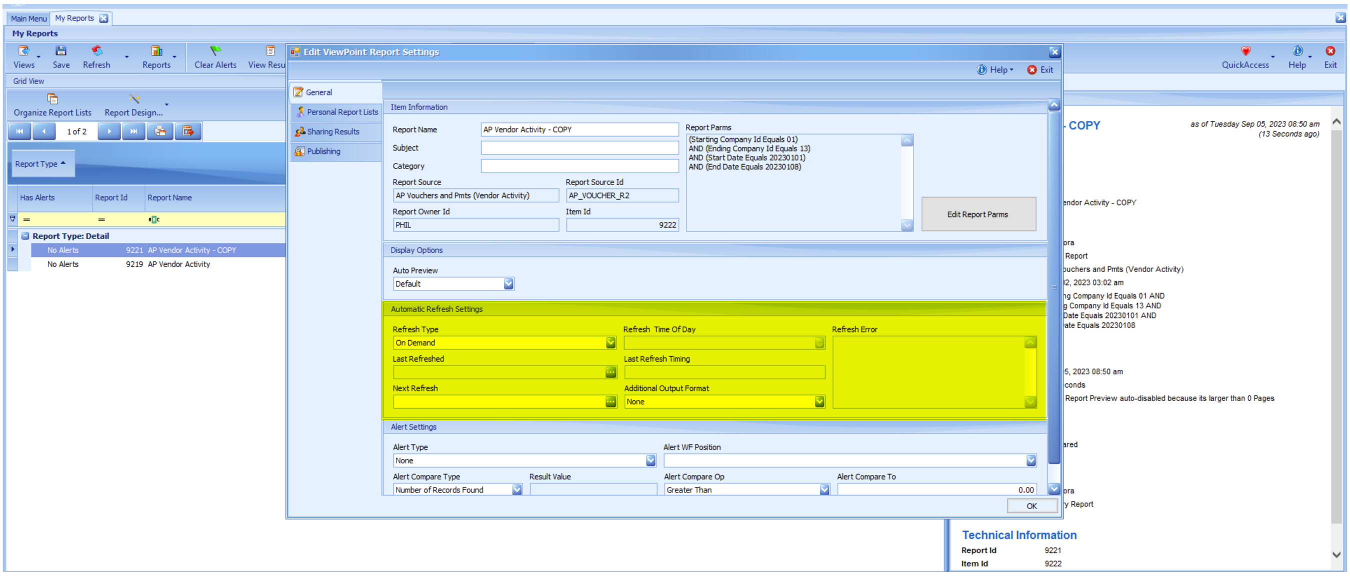
Automatic Refresh Settings

Reports can be automatically refreshed from the “My Reports” module. This is helpful if you publish the report and would like the report to automatically refresh on a set schedule so that you can avoid having to manually refresh the report for the users viewing the published report.

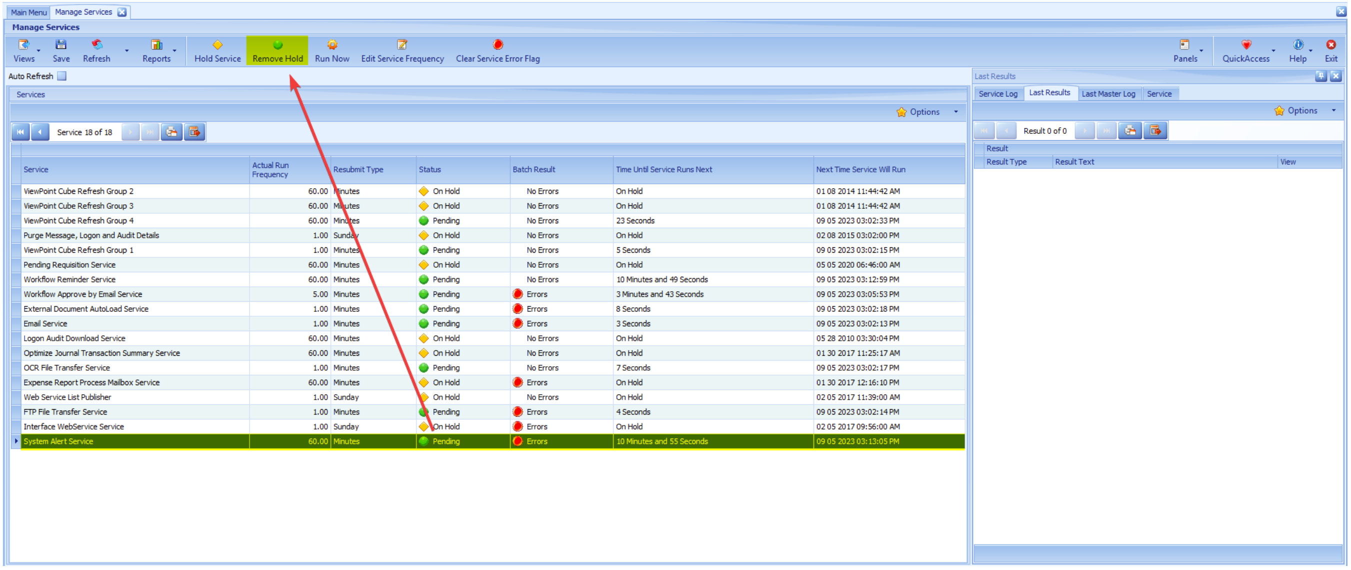
Select the report and select “Edit Report Settings”.



Located in the General tab are the report refresh settings. Once set, select “OK”.



If you find that the report is not automatically refreshing, verify the System Alert Service is Pending and not On Hold. This is found in System Maintenance > System Administration > Manage Services.


Main Menu
Manage Services
Manage Services
Views
Save
Refresh
Reports
Hold Service
Remove Hold
Run Now
Edit Service Frequency
Clear Service Error Flag
Panels
QuickAccess
Help
Exit
Auto Refresh
Services
Options
Service 18 of 18
Service | Actual Run Frequency | Resubmit Type | Status | Batch Result | Time Until Service Runs Next | Next Time Service Will Run
ViewPoint Cube Refresh Group 2 | 60.00 | Minutes | On Hold | No Errors | On Hold | 01 08 2014 11:44:42 AM
ViewPoint Cube Refresh Group 3 | 60.00 | Minutes | On Hold | No Errors | On Hold | 01 08 2014 11:44:42 AM
ViewPoint Cube Refresh Group 4 | 60.00 | Minutes | Pending | No Errors | 23 Seconds | 09 05 2023 03:02:33 PM
Purge Message, Logon and Audit Details | 1.00 | Sunday | On Hold | No Errors | On Hold | 02 08 2015 03:02:00 PM
ViewPoint Cube Refresh Group 1 | 1.00 | Minutes | Pending | No Errors | 5 Seconds | 09 05 2023 03:02:15 PM
Pending Requisition Service | 60.00 | Minutes | On Hold | No Errors | On Hold | 05 05 2020 06:46:00 AM
Workflow Reminder Service | 60.00 | Minutes | Pending | No Errors | 10 Minutes and 49 Seconds | 09 05 2023 03:12:59 PM
Workflow Approve by Email Service | 5.00 | Minutes | Pending | Errors | 3 Minutes and 43 Seconds | 09 05 2023 03:05:53 PM
External Document AutoLoad Service | 1.00 | Minutes | Pending | Errors | 8 Seconds | 09 05 2023 03:02:18 PM
Email Service | 1.00 | Minutes | Pending | Errors | 3 Seconds | 09 05 2023 03:02:13 PM
Logon Audit Download Service | 60.00 | Minutes | On Hold | No Errors | On Hold | 05 28 2010 03:30:04 PM
Optimize Journal Transaction Summary Service | 60.00 | Minutes | On Hold | No Errors | On Hold | 01 30 2017 11:25:17 AM
OCR File Transfer Service | 1.00 | Minutes | Pending | No Errors | 7 Seconds | 09 05 2023 03:02:17 PM
Expense Report Process Mailbox Service | 60.00 | Minutes | On Hold | Errors | On Hold | 01 30 2017 12:16:10 PM
Web Service List Publisher | 1.00 | Sunday | On Hold | No Errors | On Hold | 02 05 2017 11:39:00 AM
FTP File Transfer Service | 1.00 | Minutes | Pending | Errors | 4 Seconds | 09 05 2023 03:02:14 PM
Interface WebService Service | 1.00 | Sunday | On Hold | Errors | On Hold | 02 05 2017 09:56:00 AM
System Alert Service | 60.00 | Minutes | Pending | Errors | 10 Minutes and 55 Seconds | 09 05 2023 03:13:05 PM
Last Results
Service Log
Last Results
Last Master Log
Service
Options
Result 0 of 0
Result
Result Type
Result Text
View