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Ad-Hoc Reports User Guide

Figtree Base Systems- Workers Compensation

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REVISION HISTORY

Version	Effective Date (DD/MM/YYYY)	Brief Description of Change	Affected Section(s)	Prepared By	Reviewed By	Approved By
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1 What You Will Need



An Internet Connection



Your username and password

2 Lesson Objectives

The objectives of this lesson can be summarised as follows:

1. Introduction to Ad-Hoc Reports
2. Creating Ad-Hoc Reports (Adding output fields, sort order and selection criteria)
3. Updating Ad-Hoc Reports
4. Deleting Ad-Hoc Reports
5. Options for Running the Report

2.1 Introduction to Ad-Hoc Reports

2.1.1 What is ad-hoc report?

- The Ad-Hoc Report facility allow users to create (save and update as required) their customised data reports. The data results can be exported to various formats (CSV, Excel, Html).
- Ad-Hoc Report is a simple list of data recorded in the database to generate a report with the required data.
- To create a more complex report, you can specify criteria to match the record to be generated.
- For Example: A record created in a certain date range, addition of a cost centre or a coded field.
- Compared to standard reports, Ad-Hoc Reports are designed to handle instant report requirements, which could be a one time or a continual requirement.

2.1.2 Why use ad-hoc reporting?

- Ad-Hoc Reports are unique to a requirement.
- Ad-Hoc Reports can be saved and re-used by the creator or by other users with the correct security access.
- Ad-Hoc Reports can be exported to various formats for further data manipulation.

2.2 Creating Ad-Hoc Reports

Filter by Module – This displays the main module the report is created and stored in. To select or change modules, click the drop-down and select the required module.

All Users – If this option is selected, all the available reports are displayed. The username column identifies the report owner.

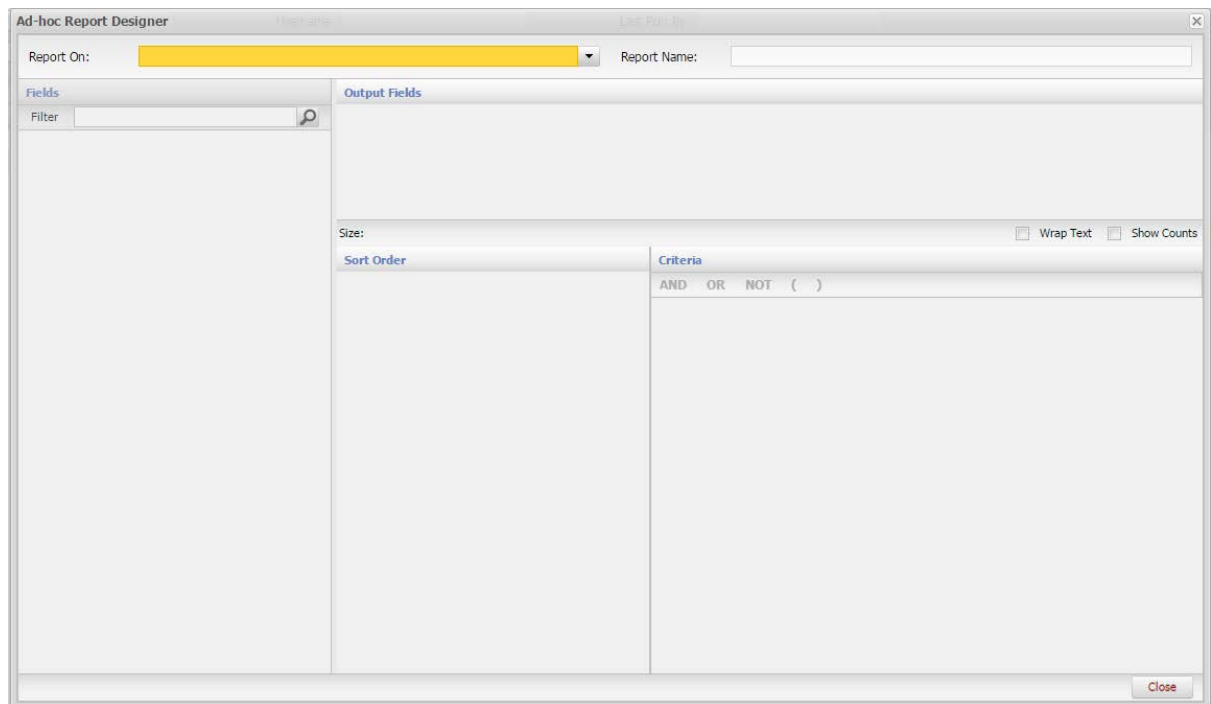
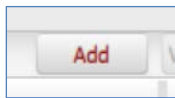
The grid lists all the Ad-Hoc Report saved in that module, showing the last modified date, last run date, last run by and the owner of the report.

The screenshot shows the 'Reporting' section of the 'NTT DATA Figtree Systems' interface. The 'Ad-hoc Reports' tab is selected. The 'Filter by Module' dropdown is set to 'Incident'. The 'All users' checkbox is checked. The 'Report Title' field is empty. The 'Last Modified from' and 'Last Run Date from' fields are also empty. The 'Search' and 'Reset' buttons are visible. Below these fields, a table lists the reports:

Title	Username
Incident Report	FIGTREE.CS1

- **Module Dependent** – The Figtree module that you chose to Report on when entering the Ad-Hoc Report section will determine the database files and fields that will be available for creating or updating an Ad-Hoc Report.
- Ad-Hoc Reports are stored against the table and the module they were created in.
- For Example: A Claim Status report will not appear in the Permanent Impairment module.
- To run the Ad-Hoc Reports, click Ad-Hoc Reports tab in System / Reporting top menu. Next select the main module you wish to create/edit a report in and then click on the Add button.

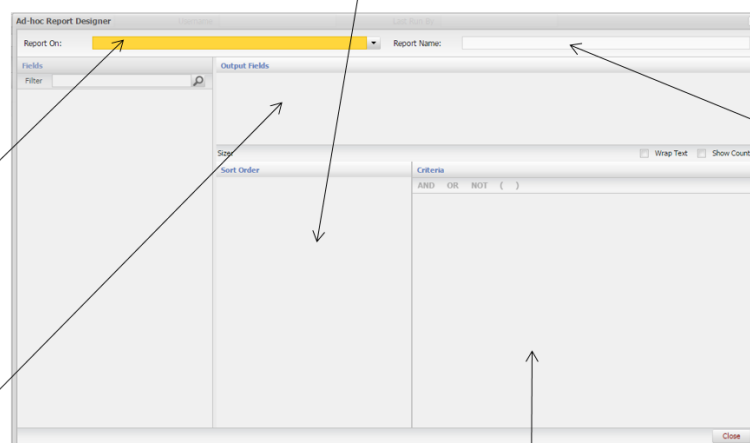
1. Click the Add button on the tool bar to add a new Ad-Hoc Report.



Sort Order Fields – This allows you to change or add additional sort orders. Note that the system automatically inserts the first Output field to the Sort Order column.

Report On – This allows you to select the Main Module you are reporting from.

Output Fields – This button allows you to select the available fields to be displayed in the Ad-Hoc Report.

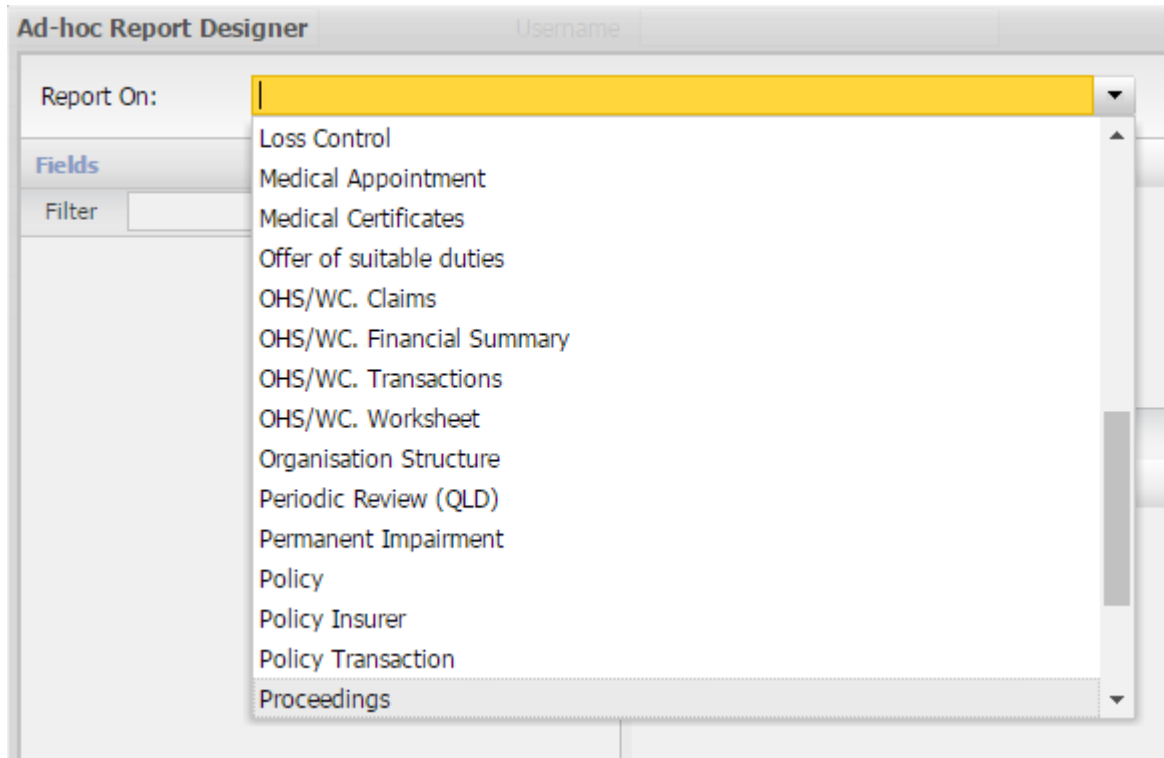


Report Name – Enter a title to describe the Ad-Hoc Report. This will be the heading on your printed report or graphical output.

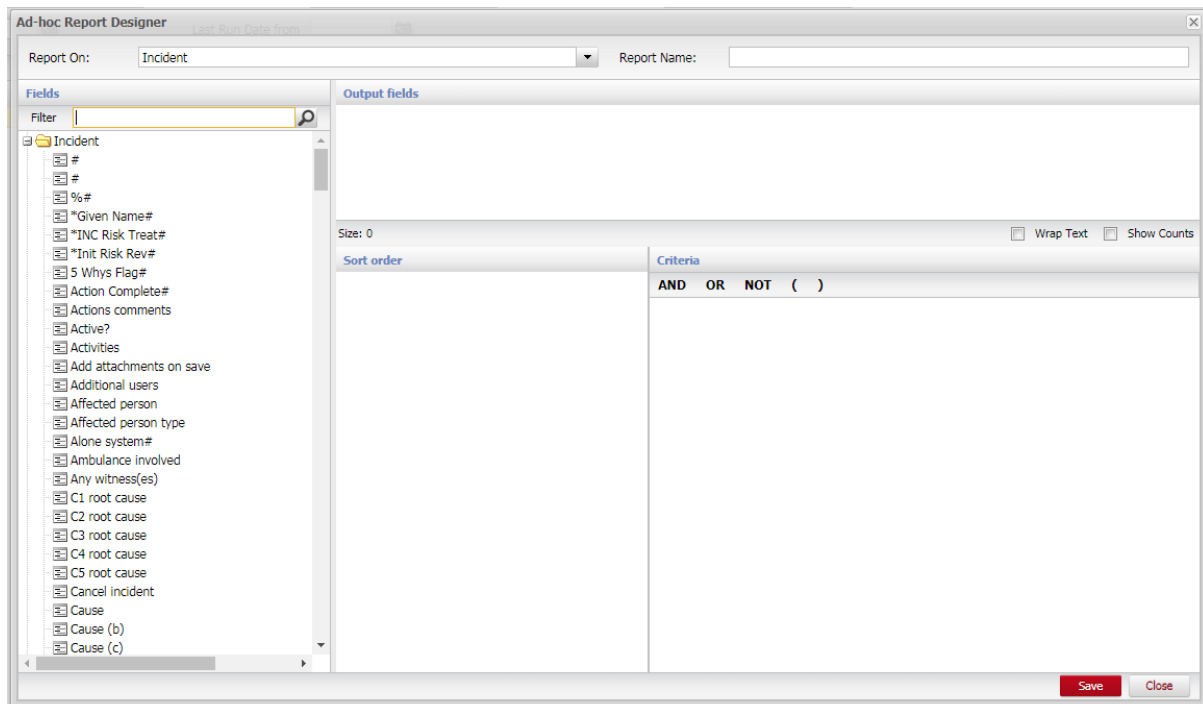
Selection Criteria – This button allows you to define what records will appear in the final result. Using all the available module fields, you can set limits to the type of records that will appear in your report.

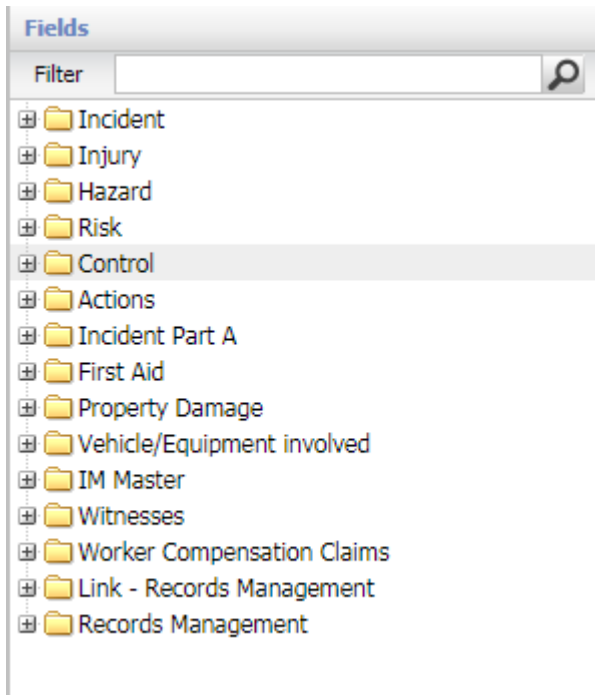
2.2.1 Report On

Select the Main Module from the Drop-Down List that you want to report on.

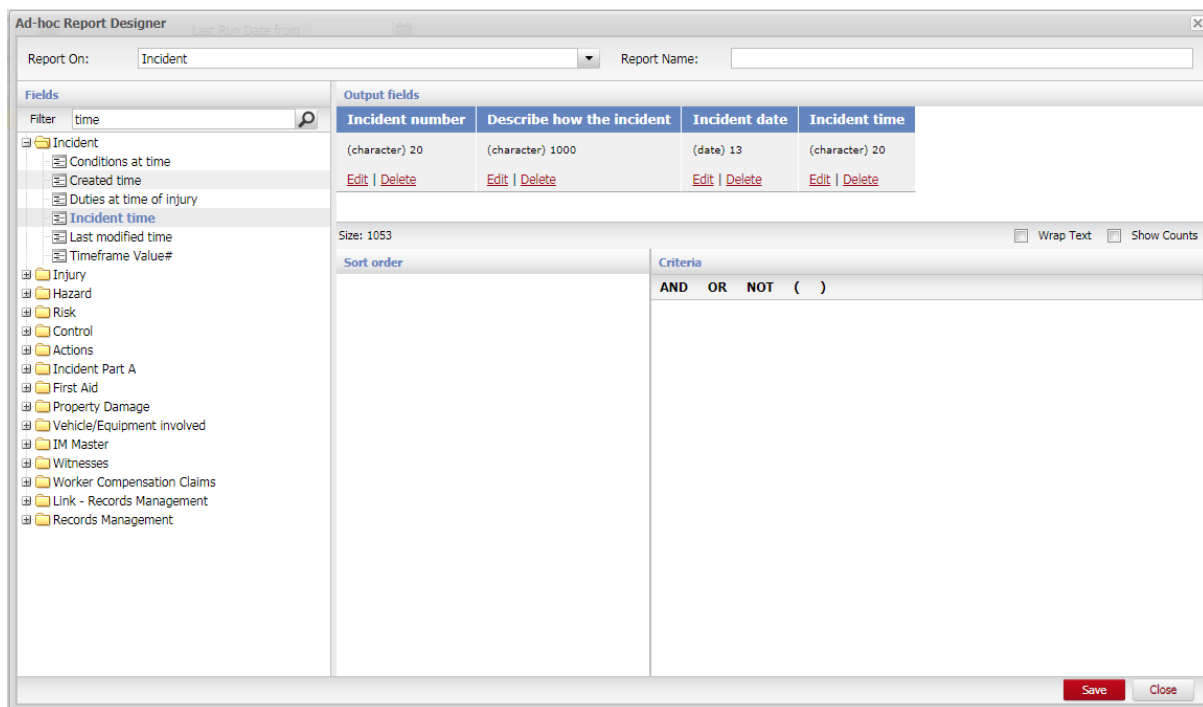


2.2.2 Output Fields





- Click on the plus size beside the Module Name for the module that you want to report on. All fields within that module will then be shown
- Output fields are the column headings that appear within the Ad-Hoc Report.
- When you find the field that you want to include in the report, either Double Click on it and it will be added to the list of Output fields, or drag and drop it into the Output Fields



Click on "EDIT" to edit the details of the field

Print Label – This is the name of the field that will appear on your report.

Code / Description – This gives you the option to choose to display either the code value, the description of the code or both.

Size – This displays the total width of the column.

The screenshot shows the 'Output Fields' section with columns: Claim number, Injury date, and Name of the case manager. Each column has a configuration row with data type, length, and edit/delete links. A modal window for 'Name of the case manager' is open, showing fields for Print Label, Size, and Code / Description, with 'Save' and 'Cancel' buttons.

- To adjust the position of any field displayed within the Output fields section, click on the field and drag it into the new position

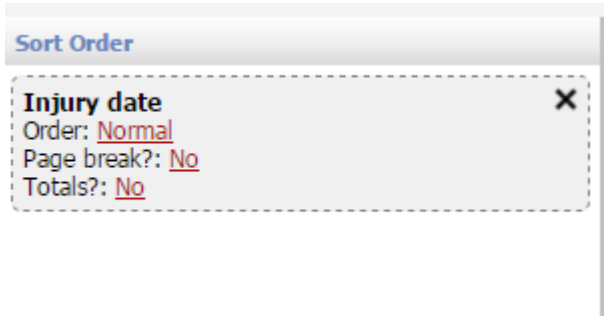
Before:

Output fields			
Incident number	Describe how the incident	Incident date	Incident time
(character) 20	(character) 1000	(date) 13	(character) 20
Edit Delete	Edit Delete	Edit Delete	Edit Delete

After:


Output fields			
Incident number	Incident time	Describe how the incident	Incident date
(character) 20	(character) 20	(character) 1000	(date) 13
Edit Delete	Edit Delete	Edit Delete	Edit Delete

2.2.3 Sort Order

	<p>After establishing the output fields, you next need to establish the output order. The system allows you to sort from any field. Just drag and drop the field into the Sort Order box</p>
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- The Sort Order Maintenance screen defines the sorting order of the output fields in the report, for example, in ascending or descending order. You can also select Page break option to define the page break in the report and / or select Totals option to produces the sum totals for the selected field.
- Adding a field to the Sort Order section:
 - Drag and drop the field into the sort order section.
- Removing a field from the Sort Order section:
 - Highlight the field you wish to remove in Sort order section and click the “X” delete button.

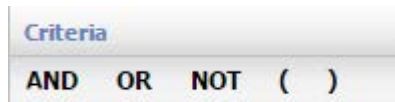
2.2.4 Selection Criteria

	<ul style="list-style-type: none"> ▪ The Selection Criteria box allows you to define the records to be displayed in the result. ▪ Using all the available module fields you can set limits to the type of records that will appear in your report. ▪ Multiple criteria selections can be specified by using logical operators of And, Or and brackets. ▪ Click Add to display the Criteria Selection screen.
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- Drag and Drop the field you want to base the Criteria on into the Criteria Selection Box.



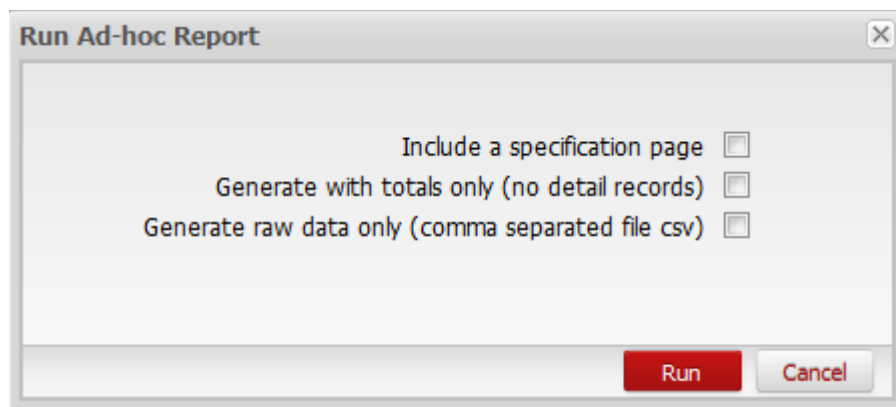
- Configure the field by clicking on the RED and BLUE hypertext



- The And, Not, Or and Brackets action buttons are available to assist you in building the criteria.

2.3 Options for Running the Ad-Hoc Report



- Click on the Report itself to open the Run Report screen.



- Include a Specification Page – This option allows you to display the fields, the sort order options and criteria used to generate the report.
- Generate with Totals Only – This option allows you to generate a total only or summary type report.
- Generate raw data only – This option allows you to generate the data as a CSV output.

2.4 Accessing the Previously Generated Reports

- Click on the “Available reports” where the previously generated reports are available in the chronologically order.

Reporting						
<div>Standard ReportsAd-hoc ReportsAvailable Reports</div>						
Report Name	Date	Time	Report	Size	Download (zip)	Delete
Case Notes Report	29/09/2017	16:19:05	R0029495.pdf	4.6 kb		

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The logo for NTT DATA, with "NTT" in a bold, blue, sans-serif font and "DATA" in a lighter blue, sans-serif font.

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