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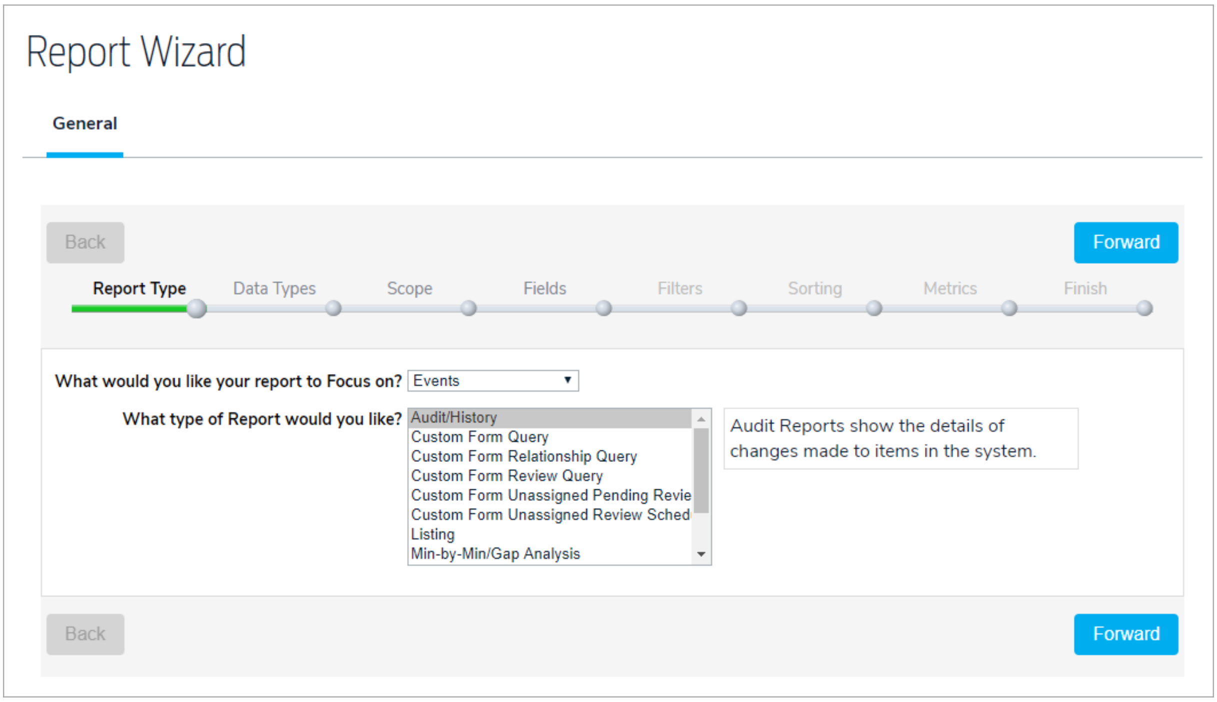
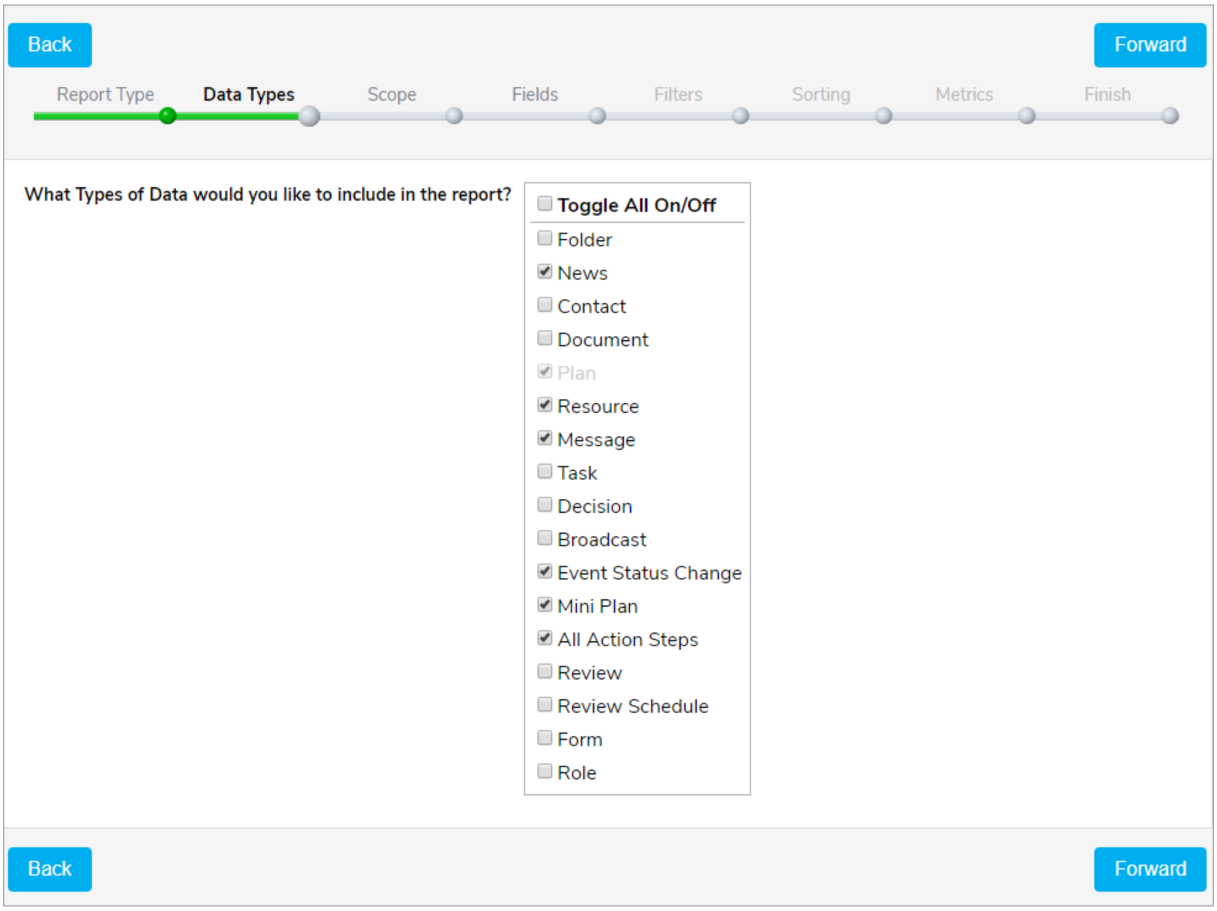
Create a Report

Before creating a new report, ensure pop-up blockers are turned off in your browser.

1. To create a new report, click Reports in the navigation bar, then click Add to display the Report Wizard.
2. Select a report focus, then report type. There are different types of reports available for each focus area. Listing reports are primarily used to retrieve information to print or download. Custom Form Query reports are primarily used to pull information into a form or plan-event editor.



3. Click Forward to move to the Data Types step.
4. Select the data type(s) you wish to include in the report. Multiple data types will appear in their own sections in the report.

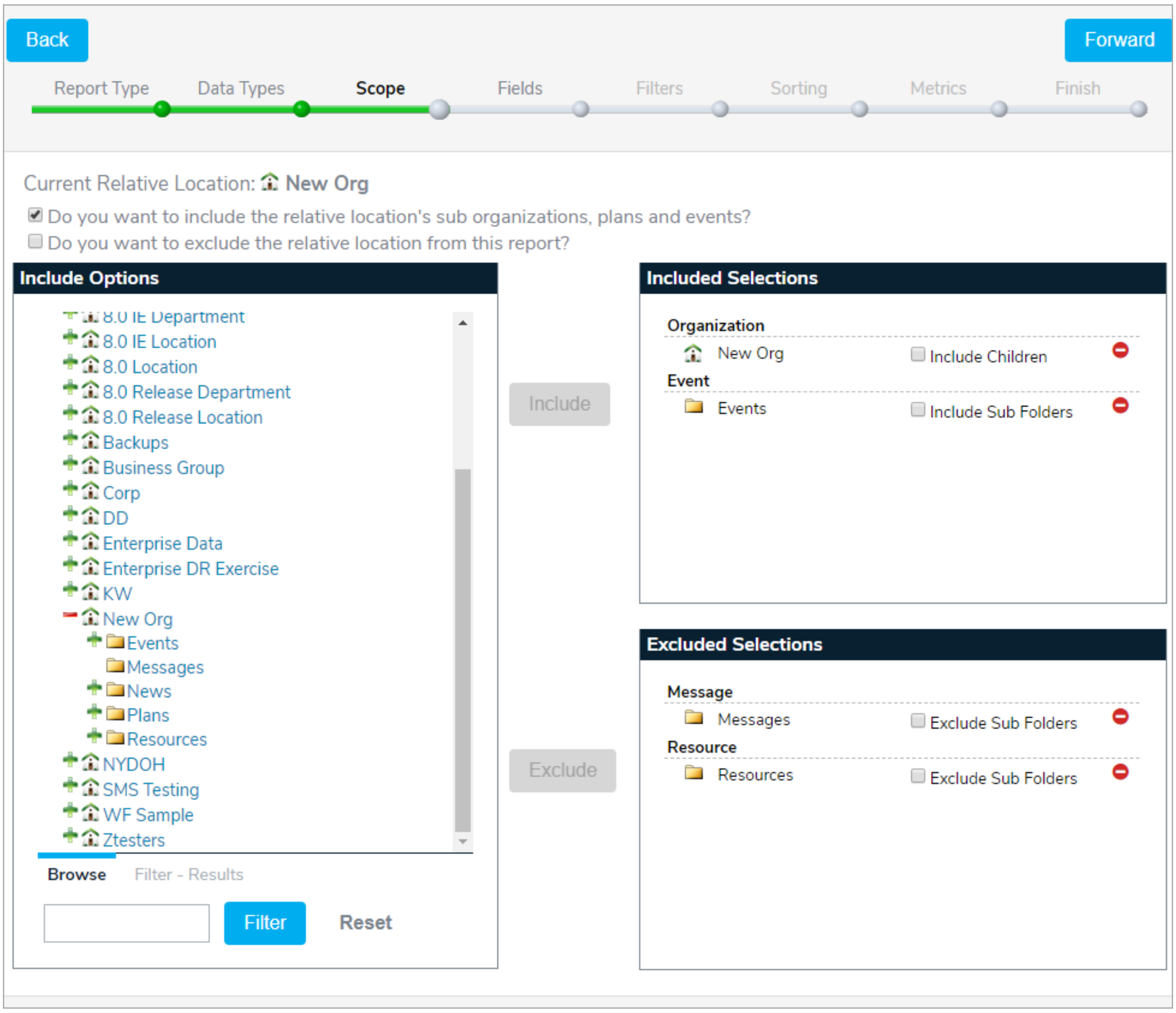


5. Click Forward to move to the Scope step.

6. Make a selection in the Current Relative Location section to either include or exclude the current organization and all its sub-folders.

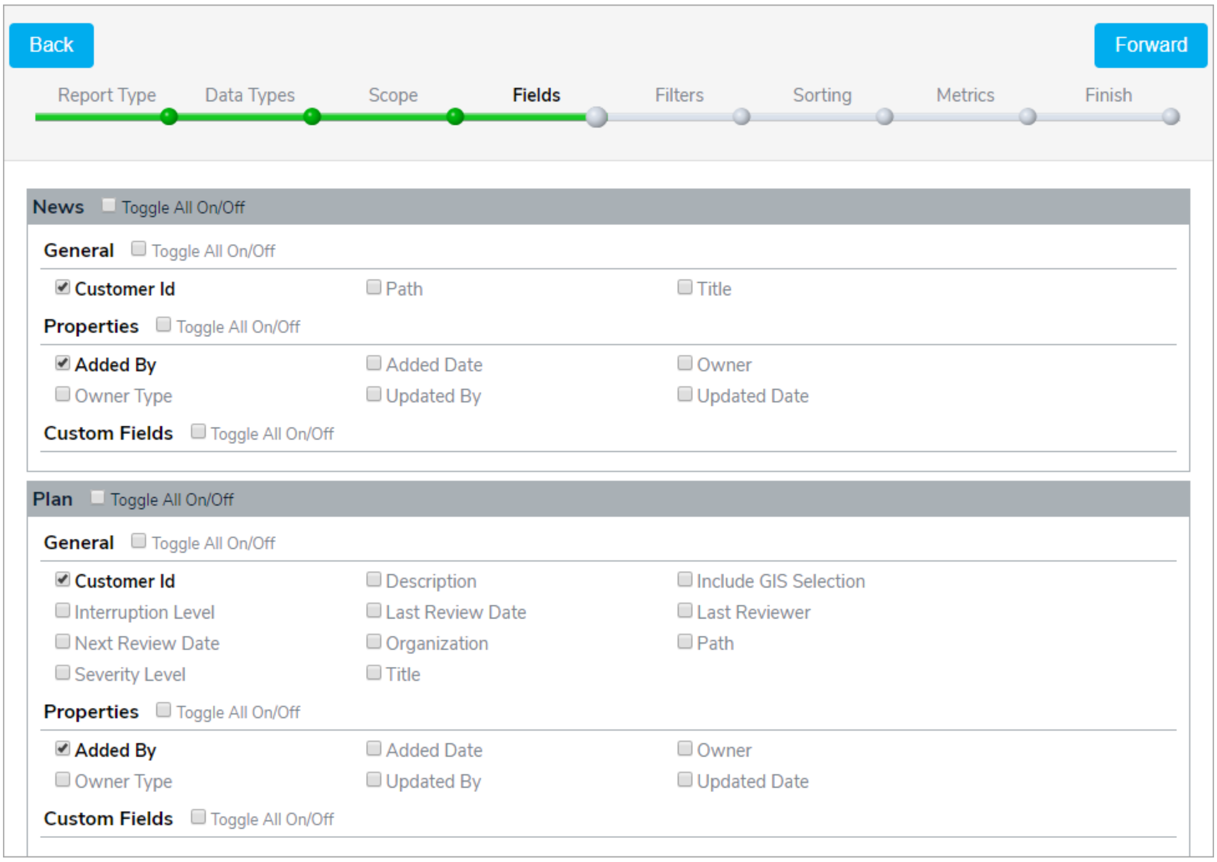
7. In the Include Options pane, navigate to the items you wish to include or exclude from the report, then click Include or Exclude.

Note: Excluding a large amount of data can affect the report's performance. As such, depending on the report, it may be better to select the orgs you wish to include, rather than exclude items on large reports.



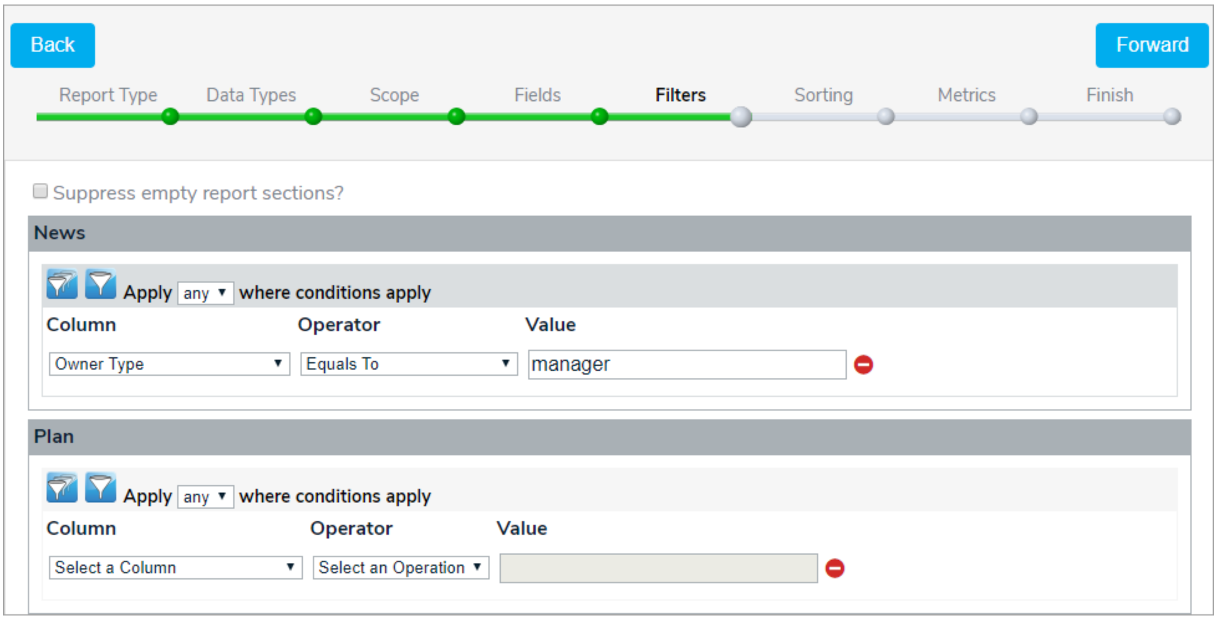
8. Click Forward to move to the Fields step.

9. Select at least one field for each data type to include in the report. The fields that appear in this step depend on the current user's roles and permissions. Note that fields that are not added to the report/query can still be used to filter, sort, and group the results.



10. Click Forward to move to the Filters step to add filters to the data types. If this button is grayed out, ensure a field has been selected for each data type included in the report.

11. Select All from the Apply where conditions apply dropdown menu to ensure the generated data meets all the conditions in the filter. Select Any to ensure the generated data meets at least one condition.



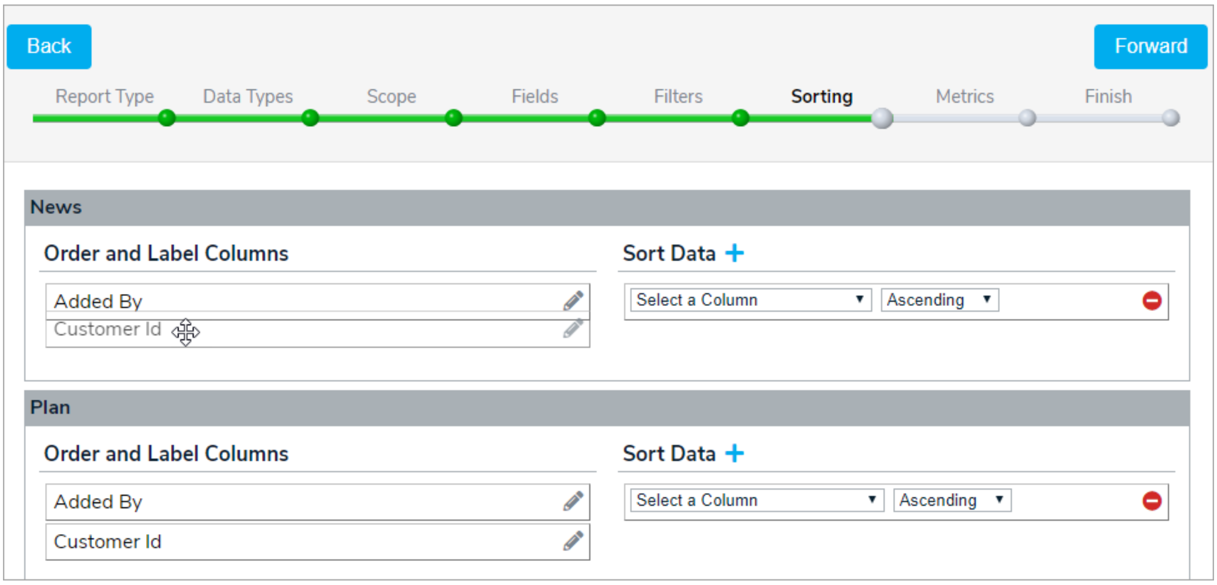
12. Select a column, operator, and value of the condition.

13. Click the  icon to add a new filter for the data type. Click the  icon to add a new filter group.

14. Click Forward to move to the Sorting step.

15. Select one or more fields associated with a data type to sort by that field.

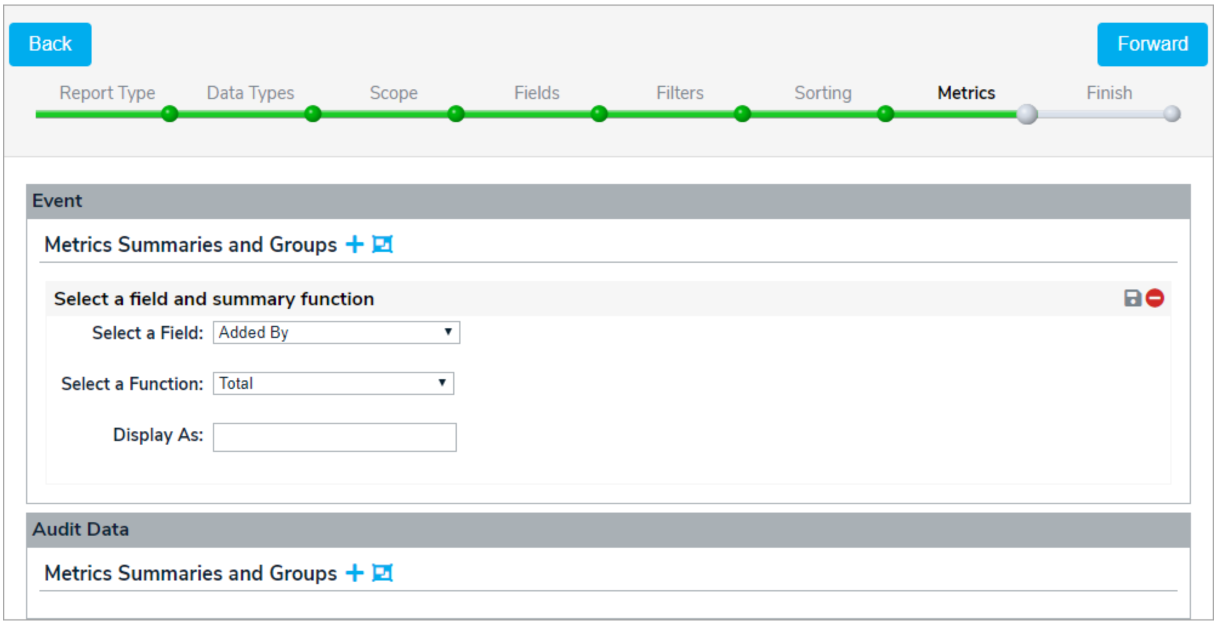
16. Click and drag a field to configure the fields' order on the report. To change the label of the field, click the pencil icon.



17. In the Sort Data section, select Ascending or Descending to choose how the fields are sorted. Click the + icon to add another sorting condition.

18. Click Forward to move to the Metrics step.

19. Click the + or icons to create summaries for the data types or create groups within each data type. For example, you could group the events by Event Date and calculate the Average Due By Minutes for each action step in those events.



20. Click Forward to move to the Finish step.

21. Enter a name for the report, select a new folder (if needed), and enter any descriptions. Click Add & Launch to save your report and launch it.

The launched report will appear in a separate window in which you can select the output type: HTML, CSV, TXT or XML. You can copy the data into a document or spreadsheet depending upon your requirements.

When displaying a report, it is given a URL similar to this one: ***http://192.168.1.110:7092/Reports/ DisplayResults.aspx?ID=135824&TYPE=HTML***

To format the report for a printer, copy the URL into another browser window and change it to***http://192.168.1.110:7092/Reports/ ShowReport .aspx?ID=135824&TYPE=HTML***

Reviews Reports

When running a review report for an object, the report displays a list of pending reviews, the reviewer type, and if the review is complete or denied.

Review

Is Pending	Review Title	Review Type	Due Date	Reviewed Date	Reviewer	Reviewer Type	Status	Days Since Completed
True	a	Basic Review	01/05/2016 02:38:00 PM		Admin Account	User		
False	a	Basic Review	12/01/2015 02:38:00 PM	12/03/2015 02:40:08 PM	Admin Account	User	Completed	2
False	B	Basic Review	12/06/2015 02:38:00 PM	12/03/2015 02:40:23 PM	Admin Account	User	Denied	2
False	a	Basic Review	12/01/2015 02:38:00 PM	12/03/2015 03:00:25 PM	Admin Account	User	Completed	2
False	B	Basic Review	12/06/2015 02:38:00 PM	12/03/2015 03:00:30 PM	Admin Account	User	Completed	2

The Review Schedule Report data type displays if the review is scheduled or dependent, if the review is assigned to a role or a user, and the Due After Cycle for dependent reviews.

Review Schedule

Review Title	Review Type	Parent Review Title	Trigger Type	Active	Assigned To	Assigned To Type	Cycle	Cycle Measure	Due After Cycle	Due After Cycle Measure
B	Basic Review	A	Dependent	True	Roles	Role	0		90	Day(s)
C	Basic Review	A	Dependent	True	Roles	Role	0		90	Day(s)
D	Basic Review	C	Dependent	True	Roles	Role	0		90	Day(s)
A	Basic Review	Unknown	Schedule	True	Roles	Role	90	Day(s)	0	

Import Summary/Exception Reports

This document explains the information presented in a Global AlertLink import summary report. This report will be automatically generated at the completion of an import cycle. This cycle could be daily, weekly, monthly, etc. The report will be automatically emailed to a list of recipients for your organization. Contact support@resolver.com to modify the list of import summary report recipients.

Import Tools & Types

Each type of data that is imported is considered an import type. There are several import type categories and a *totals* category summarizing the entire scope of the import.

Counts

Provides the total numbers for:

- Rows Processed—records processed for the particular import type.
- Records Inserted—records added to the Global AlertLink database.
- Records Updated—records modified in the Global AlertLink database.
- Records Deleted—records flagged as deleted in the Global AlertLink database. Once a record is removed from the import file it is subsequently flagged as deleted from the Global AlertLink database.
- Records Moved—records whose parent has changed during the import.
- Dependent Records Inserted—the number of ancillary or dependent records that had to be inserted because of a parent record being added to the system. As an example, the addition of an organization would require the addition of its folders. This may not be applicable to certain import types.
- Dependent Records Deleted—the number of ancillary or dependent records that had to be deleted because of a parent record being removed from the system. This may not applicable to certain import types.
- Records Failed—records that failed to import for various reasons. This includes data validation errors. Review the *Detailed Exception Report* to determine the cause of the failures.

Detailed Exception Report

The Detailed Exception Report contains record details that could contain personal information that would not be appropriate to deliver via email. This information must be retrieved by a secure delivery mechanism, typically SFTP. The file will be uniquely named incorporating the date and time of processing. The *Detailed Exception Report* will automatically be removed from the SFTP site at the beginning of the next scheduled import run.

EXAMPLE:

From: noreply@resolver.com [mailto:noreply@resolver.com]

Sent: Monday, December 15, 2014 9:00 AM

To: Imports

Subject: TEST GAL Import Report

This Global AlertLink import report summarizes the past 2 days, and was generated on Dec 15, 2014 2:00PM UTC

Import Totals:

Rows Processed: 0

Records Inserted: 0

Records Updated: 0

Records Deleted: 0

Records Moved: 0

Dependent Records Inserted: 0

Dependent Records Deleted: 0

Records Failed : 0

Import Type: Contacts

Rows Processed: 0

Records Inserted: 0

Records Updated: 0

Records Deleted: 0

Records Moved: 0

Dependent Records Inserted: *

Dependent Records Deleted: *

Records Failed : 0

Import Type: Contact Methods

Rows Processed: 0

Records Inserted: 0

Records Updated: *

Records Deleted: 0

Records Moved: *

Dependent Records Inserted: *

Dependent Records Deleted: *

Records Failed : 0

Import Type: Roles

Rows Processed: 0

Records Inserted: 0

Records Updated: 0

Records Deleted: 0

Records Moved: 0

Dependent Records Inserted: 0

Dependent Records Deleted: 0

Records Failed : 0

Import Type: Custom Fields

Rows Processed: 0

Records Inserted: 0

Records Updated: *

Records Deleted: 0

Records Moved: *

Dependent Records Inserted: *

Dependent Records Deleted: *

Records Failed : 0

Import Type: Resources

Rows Processed: 0

Records Inserted: 0

Records Updated: 0

Records Deleted: 0

Records Moved: 0

Dependent Records Inserted: *

Dependent Records Deleted: *

Records Failed : 0

Import Type: Shares

Rows Processed: 0

Records Inserted: 0

Records Updated: *

Records Deleted: 0

Records Moved: *

Dependent Records Inserted: *

Dependent Records Deleted: *

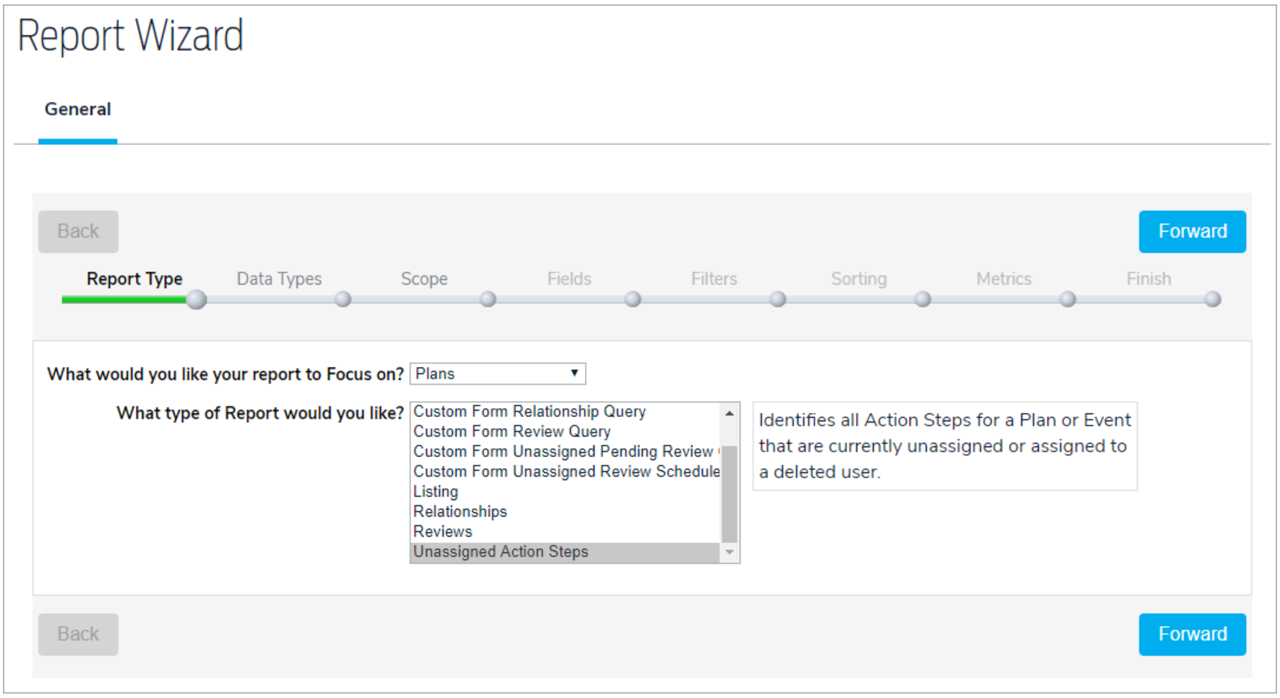
Records Failed : 0

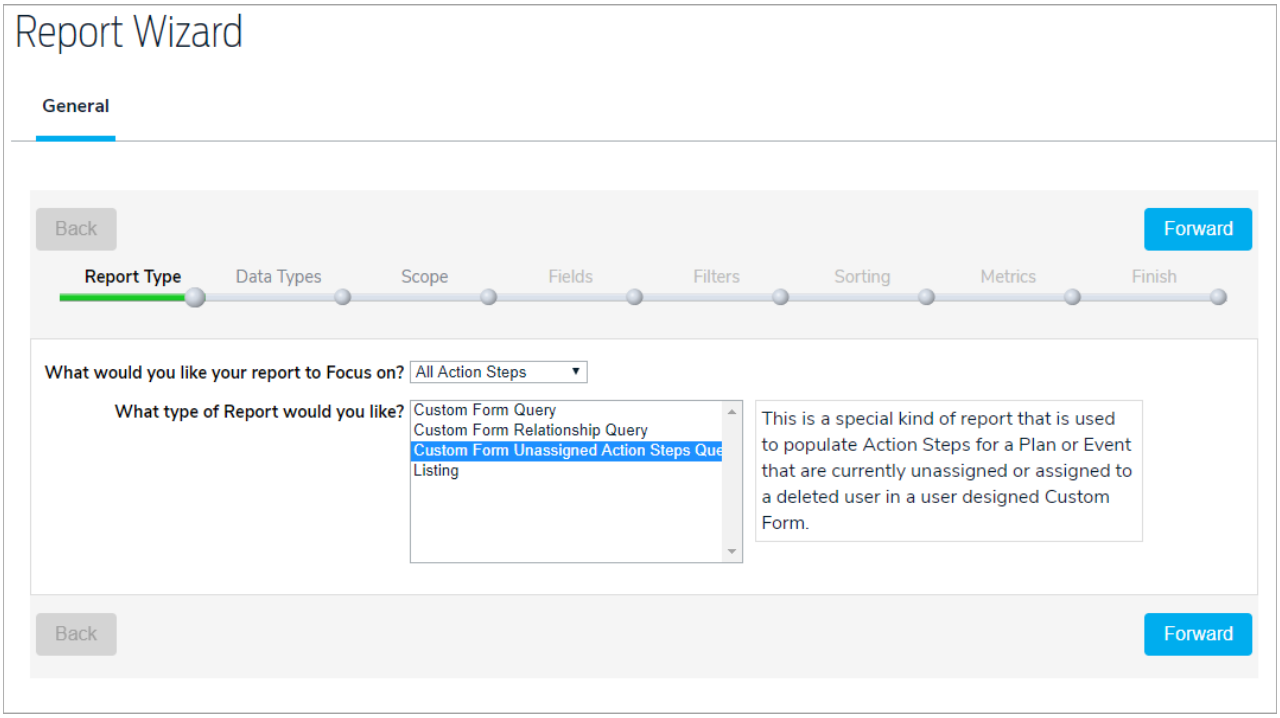
* Not applicable to this import type.

For a detailed exception report review the following file on the SFTP server: Exception Report: (Import Date)_import_exceptions.txt

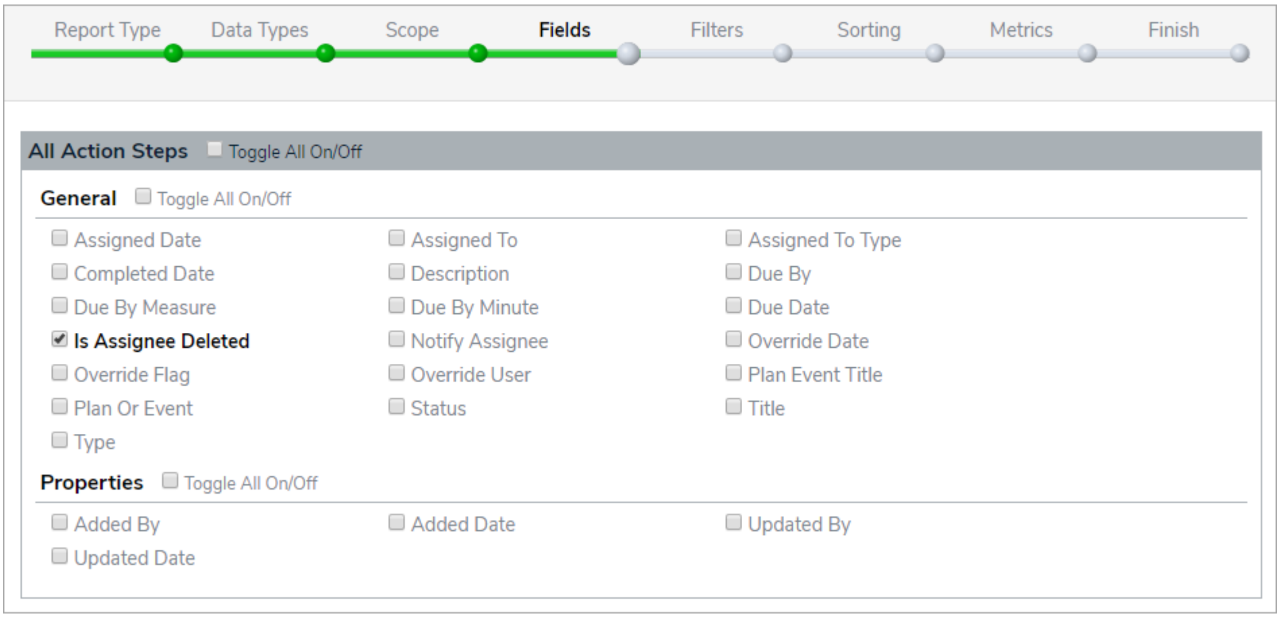
Deleted User or Role Reports

When a user is deleted in GAL, their task assignments (action steps, decisions, mini plans, and event status changes) and review assignments are not removed. The the Unassigned Action Steps reports on Plans and Action Steps allow you to determine which action steps are currently unassigned or assigned to a deleted user.

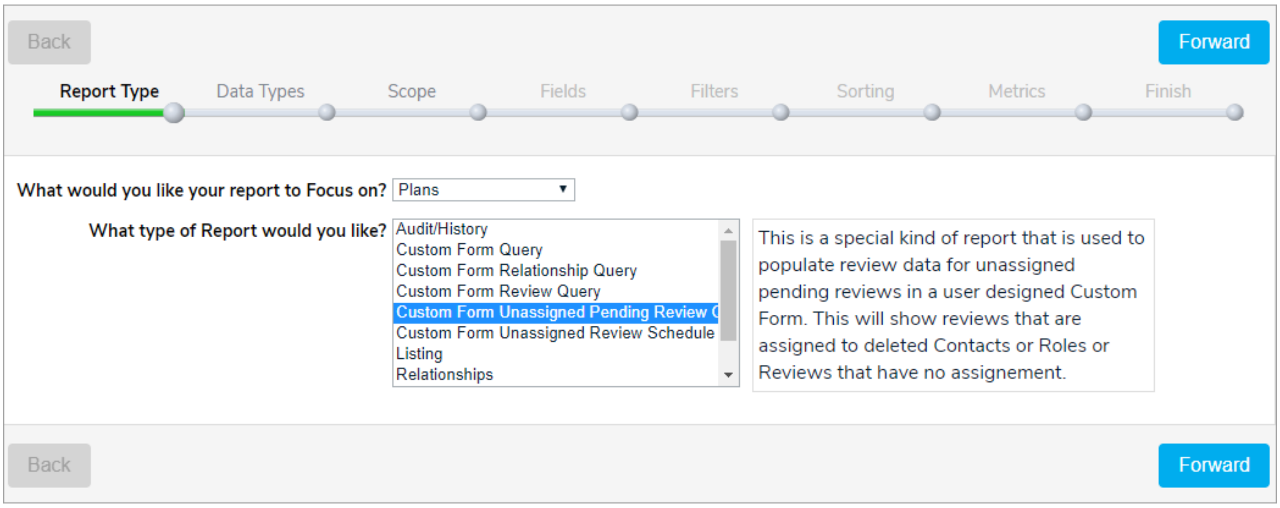




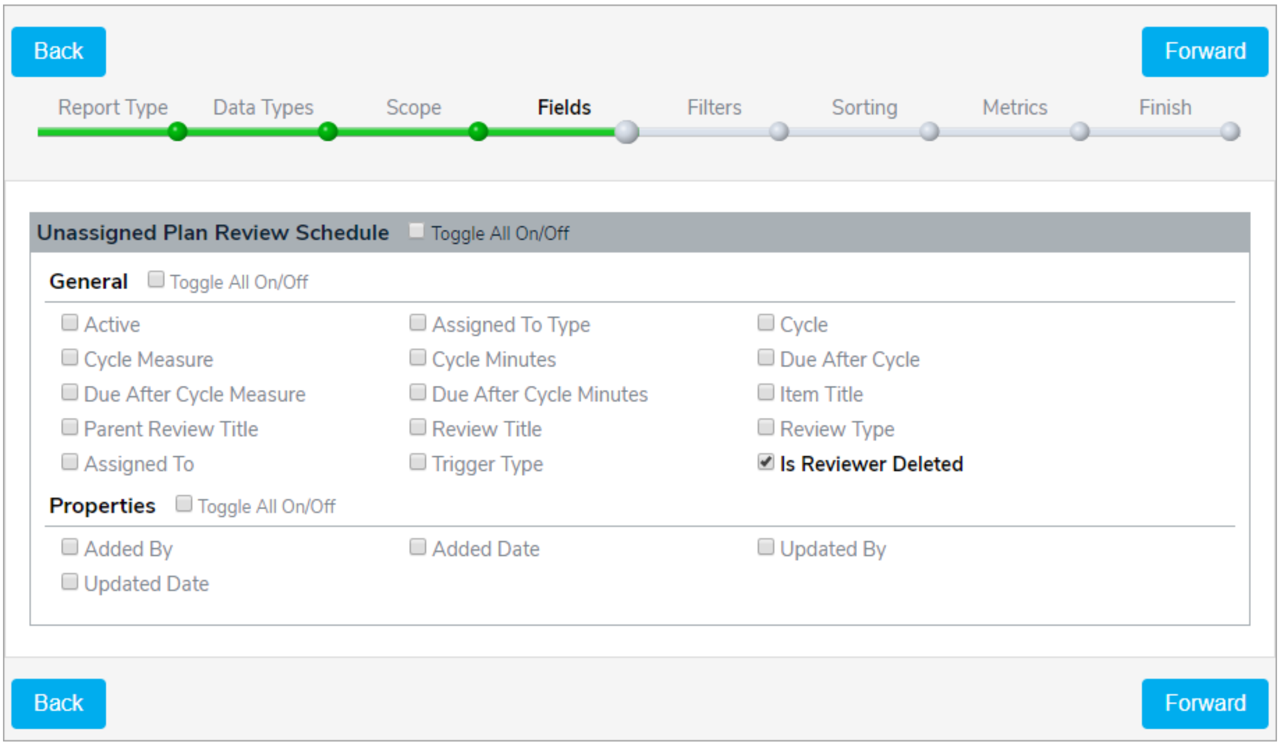
When configuring these report types, you can select the Is Assignee Deleted field to show if the user or role assigned to the task has been deleted from the GAL system.



The Custom Form Unassigned Pending Review Query and Custom Form Unassigned Review Schedule Query report types allow you to locate any forms, plans, or events that have scheduled or pending reviews that have no assignment or are assigned to deleted contacts or roles.



When configuring the fields of these report types, you can select the Is Reviewer Deleted field to display if the user or role assigned to the review has been deleted from the system.


Back
Forward
Report Type
Data Types
Scope
Fields
Filters
Sorting
Metrics
Finish
Unassigned Plan Review Schedule
Toggle All On/Off
General
Toggle All On/Off
Active
Assigned To Type
Cycle
Cycle Measure
Cycle Minutes
Due After Cycle
Due After Cycle Measure
Due After Cycle Minutes
Item Title
Parent Review Title
Review Title
Review Type
Assigned To
Trigger Type
Is Reviewer Deleted
Properties
Toggle All On/Off
Added By
Added Date
Updated By
Updated Date
Back
Forward

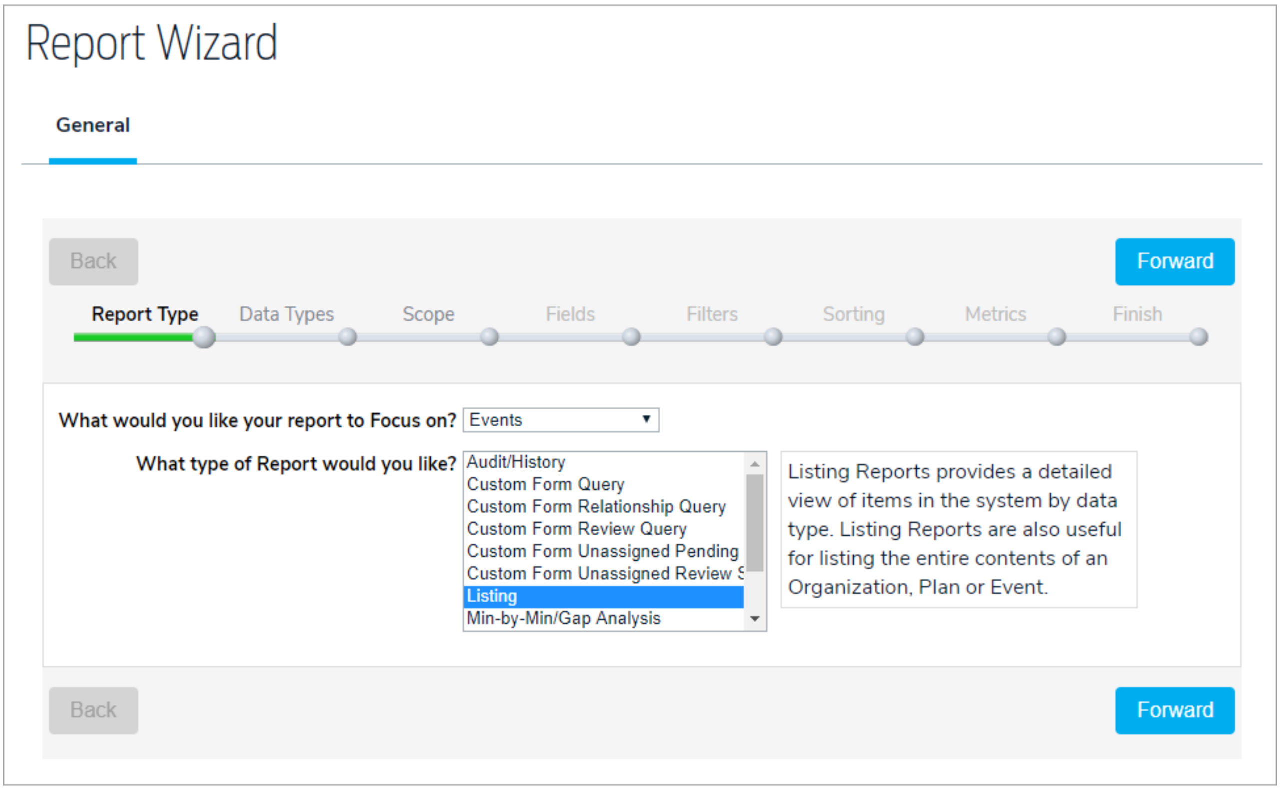
Report Wizard Tutorial

Any user creating and/or running reports must have the proper authority to view and read the data that they are querying or listing. A user's Roles, Permissions and Organizational Structure (RPO) determine the scope of data available to them for reporting.

The Report Wizard provides the user the capability to list and query data for use in a report or a Custom Form. Custom Forms can be used to access or add data to the GAL database, activate plans and export data outside of the system.

Report Type

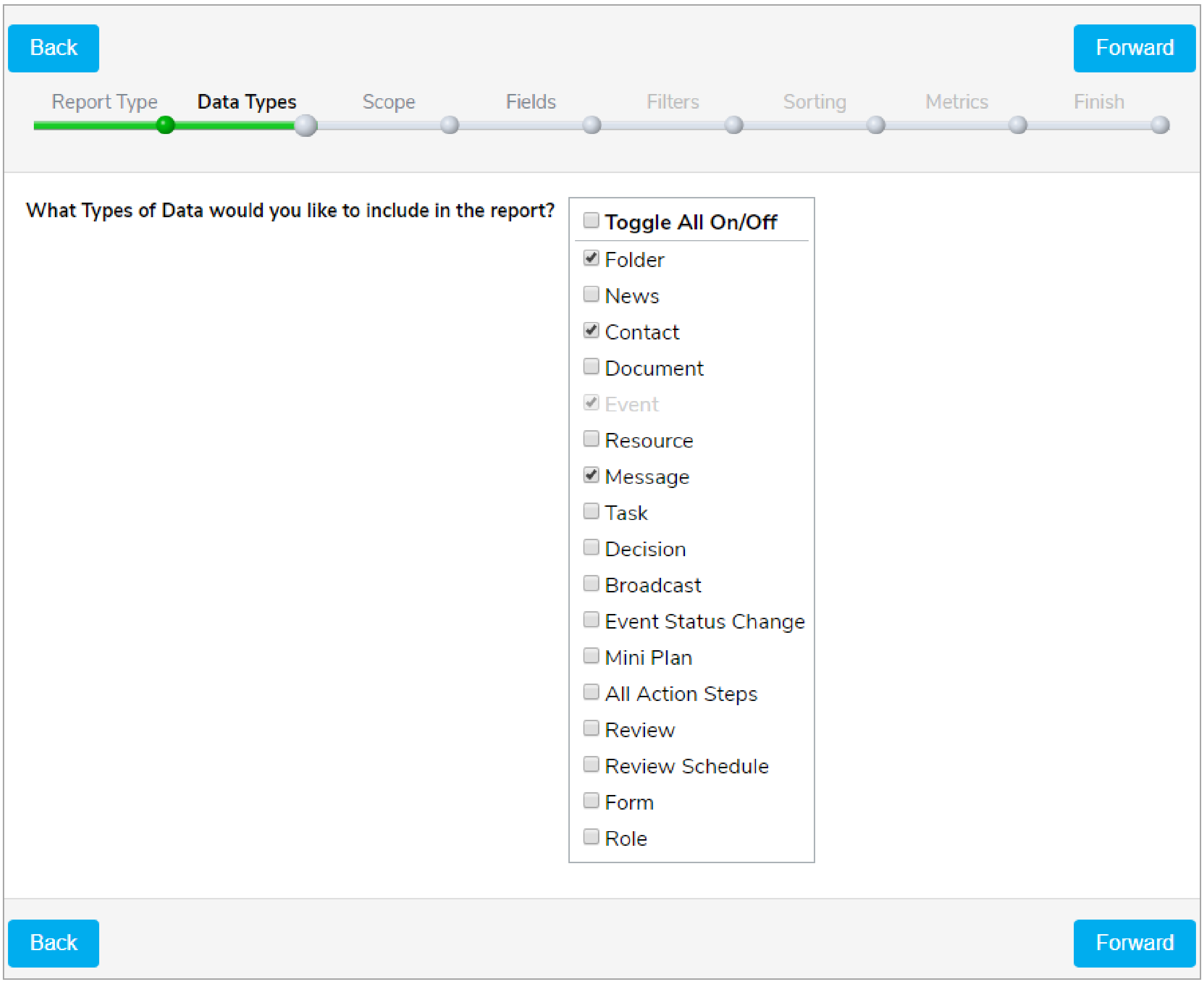
In this example, the user wants a report for the events that they have the authority to view. There are other types of reports available, which ones are available depend upon the focus of your report/query. For an explanation of each type of report, move your mouse over each one and read the accompanying help text. Clicking the button takes the user to the next section in building their report/query.



Data Types

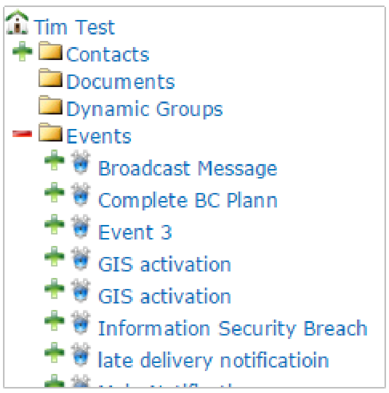
Depending upon the data object (focus) of the report/query, different data types can also be included in the report. Since the focus of this report is events, the user can include other GAL data objects that are part of the event. Simply, check the box for the other types of data that you want.

What is the scope of your report/query? Do you want to look at all the events you have the authority to view or do you want to include/exclude events for an entire organization in your hierarchy, a certain plan, a specific event? The scope of your report determines how much data you are selecting. Here, I have selected three events for my report.



Scope

Here is where I found these in my organization hierarchy. Depending upon the size of your organization and the complexity of your hierarchy, you may need to use the filter capability in order to search for specific data objects.



The scope of your report/query can determine how fast it runs, what is or isn't included in the results and, most importantly, if you don't see the organization and/or data object you want, chances are that your RPO doesn't allow you to see them.

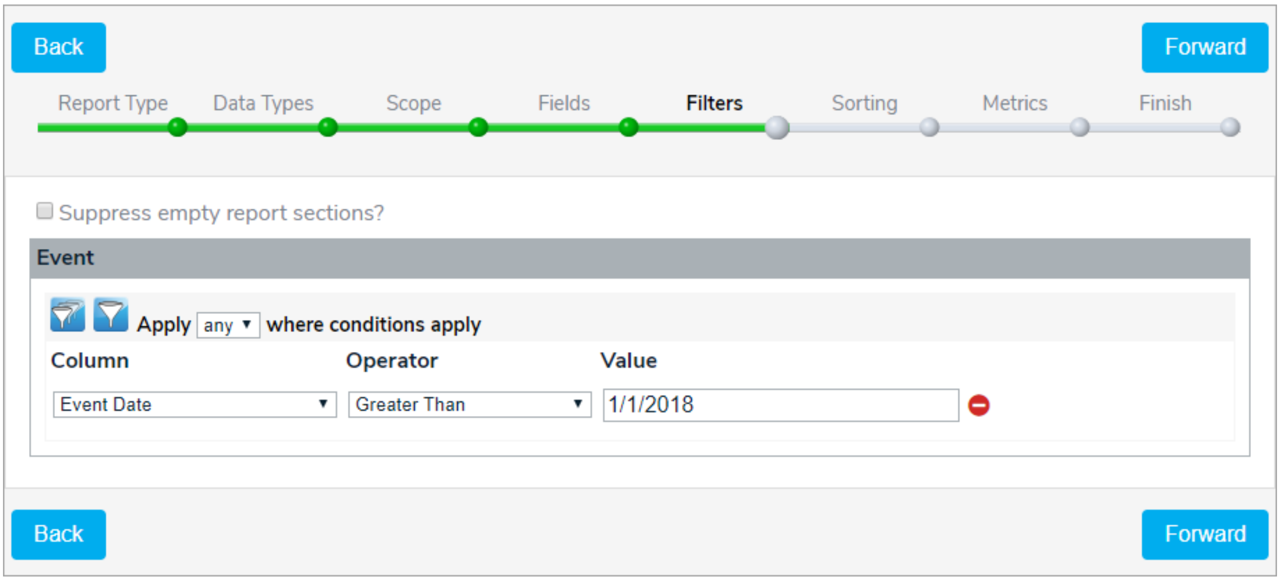
Fields

Each GAL data type has different fields that are available for the report. The user's RPO determines which fields they can include in their report. Any custom fields that are associated with each GAL data type are also available if you have the authorization.

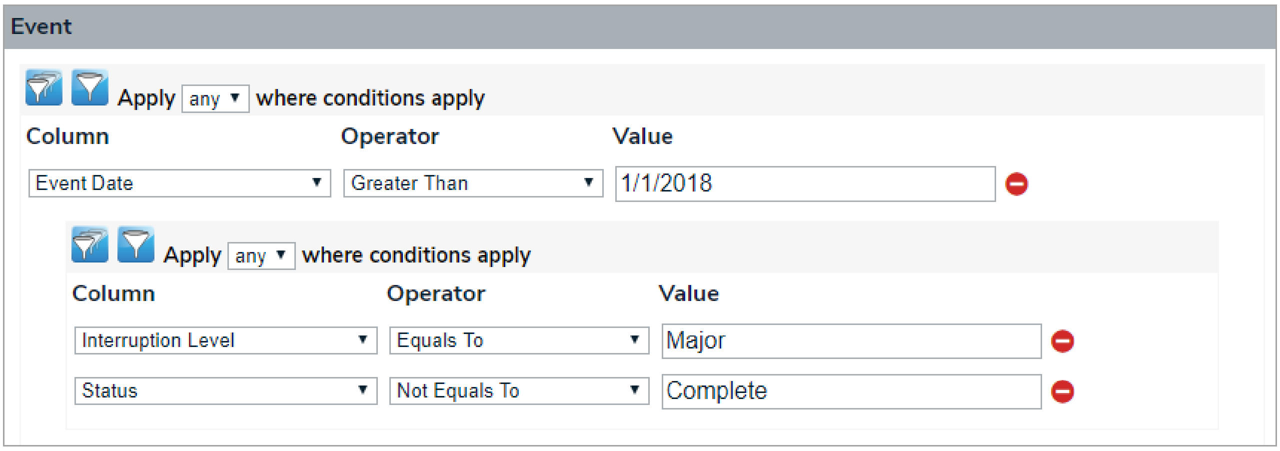
You must select at least one field for each data type in order for the Forward button to be active. I have selected one field for each data type that we included in this report. Even though you might not select a field for inclusion in the report/query, it can still be used to filter, sort, and group your results.

Filters

I only want to see the data from records after January 1, 2018, so I have set up a filter like this:



You can set up a filter for each data object that you have selected, but you do not have to create a filter for each data object or create filters at all. Filters also allow you to specify grouping within each data type. For example, I could add this filter to my report:



Now, only data from events that occurred after January 1, 2018 with an interruption level of Major or a of status Not Complete will be in the report.

Filters give you a lot of flexibility to select exactly what data to include/exclude but take some time to understand how ALL and ANY work for your report. When you use filters on multiple data objects it can get complicated and you may end up with no data for a specific data object or, for that matter, the entire report may be blank.

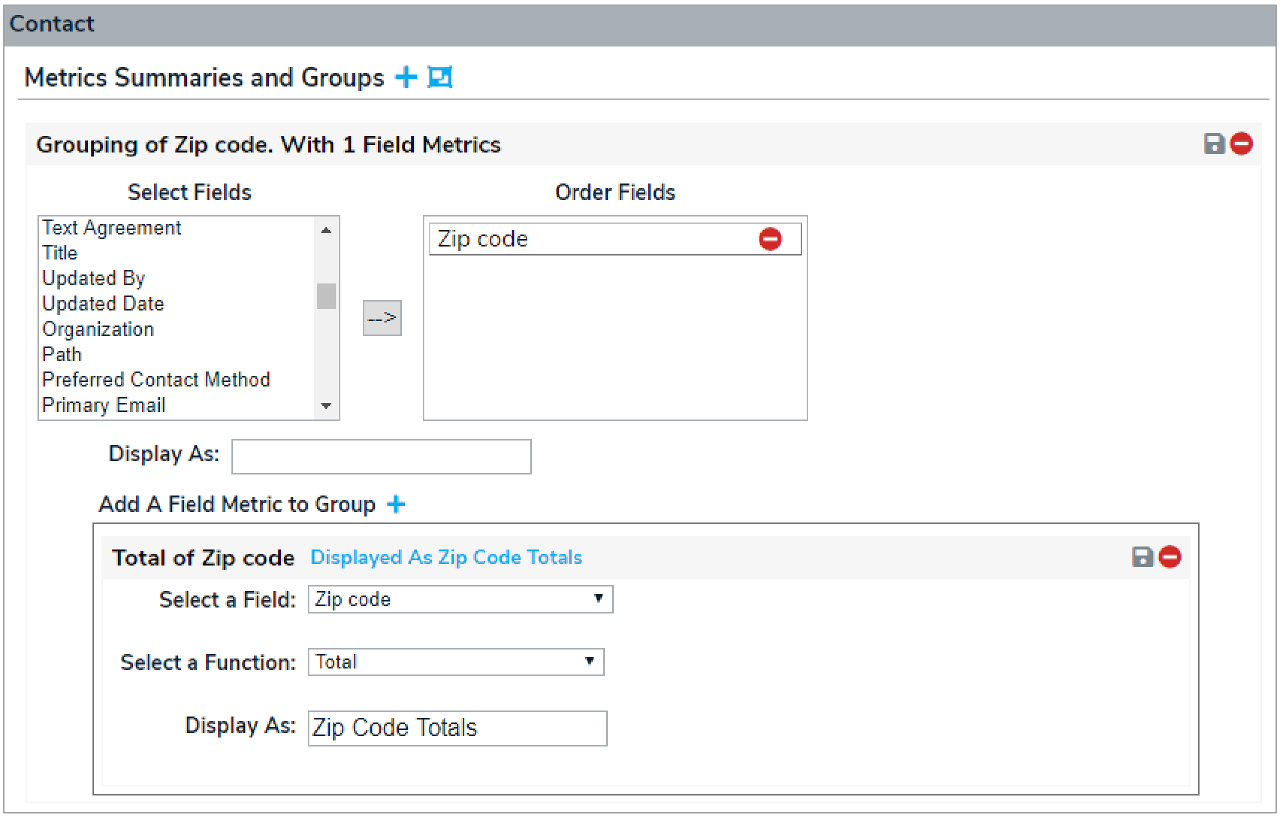
Sort

The data you have selected can be sorted by any field associated with each data object. You can also order the fields within each data object in order to sequence how the fields are listed across the page of your report. You can change the field label names in each section as well. I can set up multiple sort fields but, remember, it is determining how to sort the data within each data type section. My report will have 4 sections: Folder, Contact, Event, and Message and that order cannot be changed.

Metrics

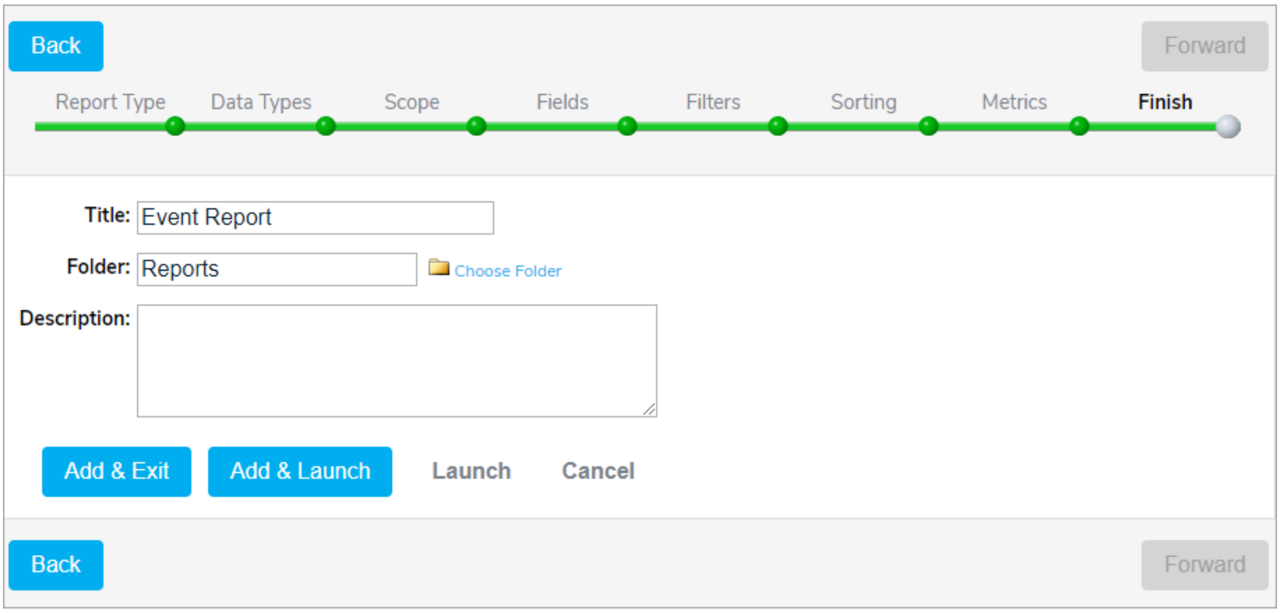
The final part of your report/query allows you to create summaries for each data type and create groups within each data type. For example, I could group all of the contacts in my report by zip code.

In addition, I could get a count by zip code of the contacts involved in the events that I have selected.



Finish

The last task prior to saving your report/query is to give it a title, description and tell GAL which folder the report will be saved in. The report is displayed on the screen and allows the user to display it in HTML, CSV, TXT or XML format. If the report needs to be edited after launching, click the Back button to return to the wizard.

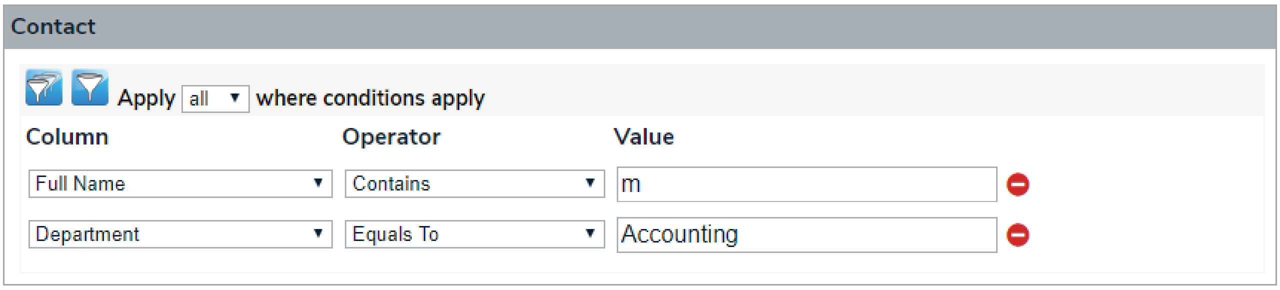


And/Or Logic in Reports

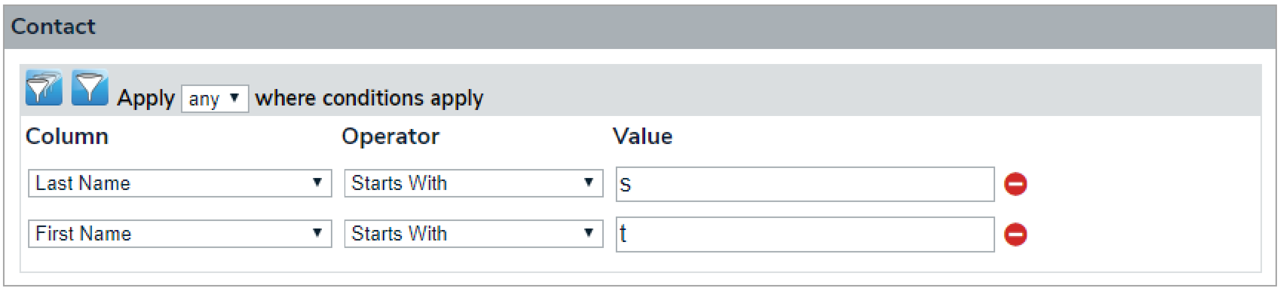
Suppose you go to a nightclub where the doorman's job is to enforce a simple rule: "Everyone (ALL) in your group must wear a tie to come in". You go along with a friend one night. If you're both wearing ties, you'll get in. If only one of you is wearing a tie, or if neither of you is, neither of you will get in.

You're not wearing a tie, so you go to another club further down the street. Here, the person on the door is enforcing a different rule: "A group of people can come in if some of them (ANY) is a member". If either you or your friend is a member, or if you both are members, you can both come in. If neither of you is a member, you're both left out in the cold.

Suppose you run a report in GAL and you want to get a list of ALL of the contacts in the East Organization. You scope the report to only look at the East Organization. Select the fields you want to look at and run the report. However, if you wanted to see ALL of the records in East Organization that have “m” in their name AND that work in the Accounting Department you would filter the records this way:

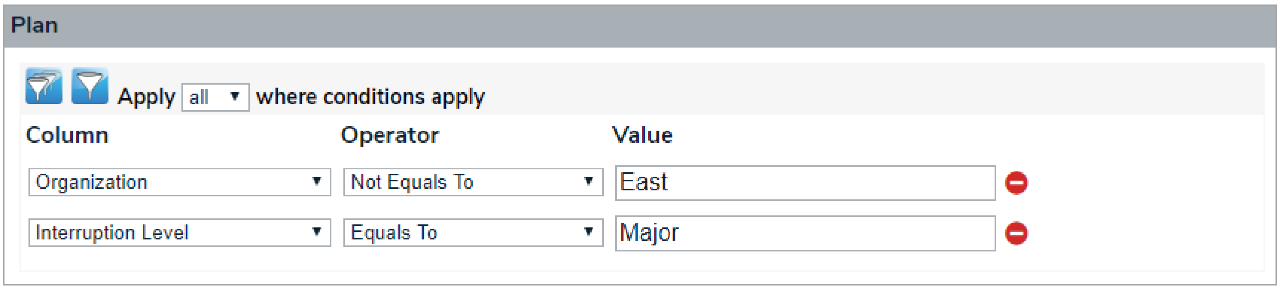


But suppose you wanted to see a list of contacts whose last name started with “s”. You would filter the contacts you want to see by selecting ANY records where last name starts with “s”. Now you want to see all contact in East Organization whose last name starts with “S” OR whose first name starts with “t”. You still are looking at only some of the records. You would filter the records by adding two ANY statements:



In GAL, our report builder uses the ALL (AND) and ANY (OR) operators to combine multiple conditions to narrow data for your report.

These operators provide a means to make multiple comparisons with different fields. For example, here is how we use AND when building a report listing all of the plans. This would create a report showing ALL of the PLANs that are not part of the “East” Organization AND have an Interruption Level of “Major”.

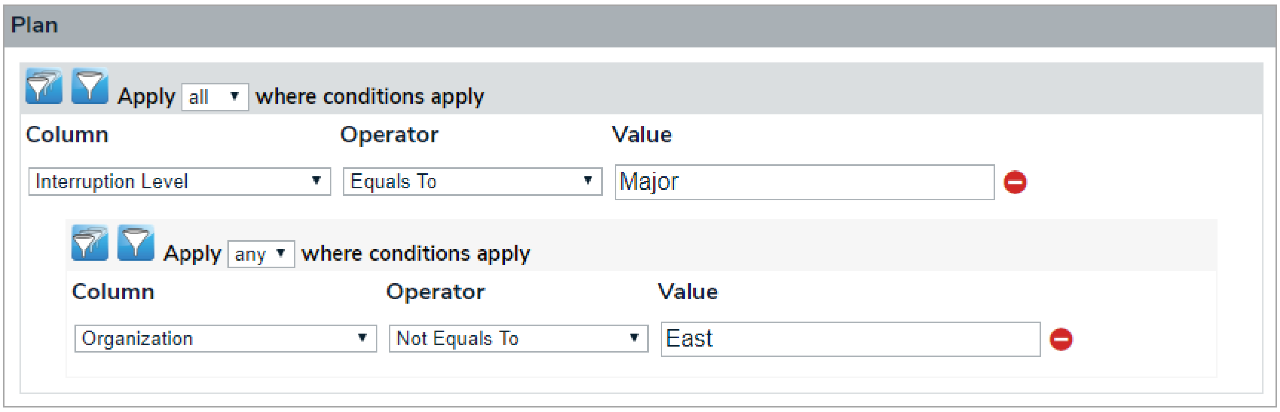


You can combine as many number of conditions using the ALL (AND) operator but all of the conditions must be TRUE in order for the report to list any plans.

Let’s compare this with the ANY (OR) operator in our report builder. You can combine as many number of conditions using the ANY operator but only one of the conditions must be TRUE for the report to run.

What records will be on this report? Be careful this is a tricky question. Do you think if a PLAN that is part of the “East” Organization with an Interruption Level of “Major” would be included on the report? It would. ANY record that satisfies ANY of the conditions would end up in our report. The ANY operator displays a record if either the first condition OR the second condition is true.

Let’s try this:



I would end up with a report that only included PLANs with “Major” Interruption Level AND that did not belong to “East” Organization. The first operation gives me ALL PLANs with “Major”. The second operation looks at those records AND gives me only PLANS that do not belong to “East”.

Let’s go back to our nightclub. What if we saw this sign posted on the door? Who gets in?