Ad Hoc Report Design

PURPOSE

This document shows the procedures on how to create/ design ad hoc report.

WHY IS THIS IMPORTANT?

With the Dynamic Reports feature, users can create their own reports via a drag-and-drop interface using data available to them. These reports can be exported to various file formats including PDF and Excel.
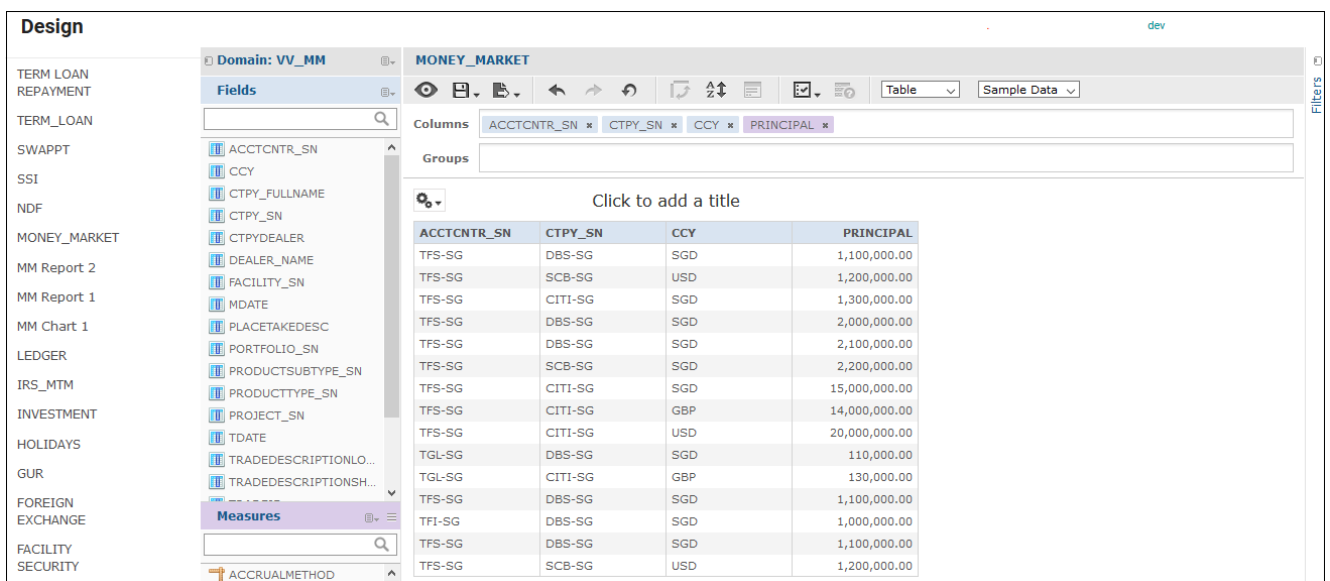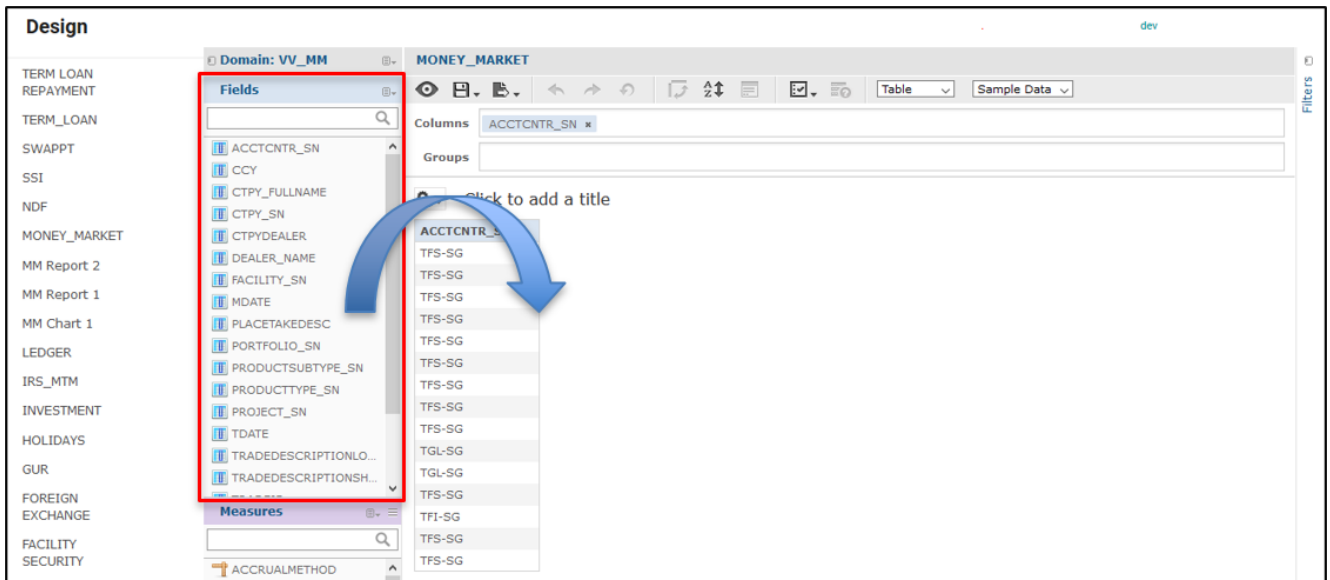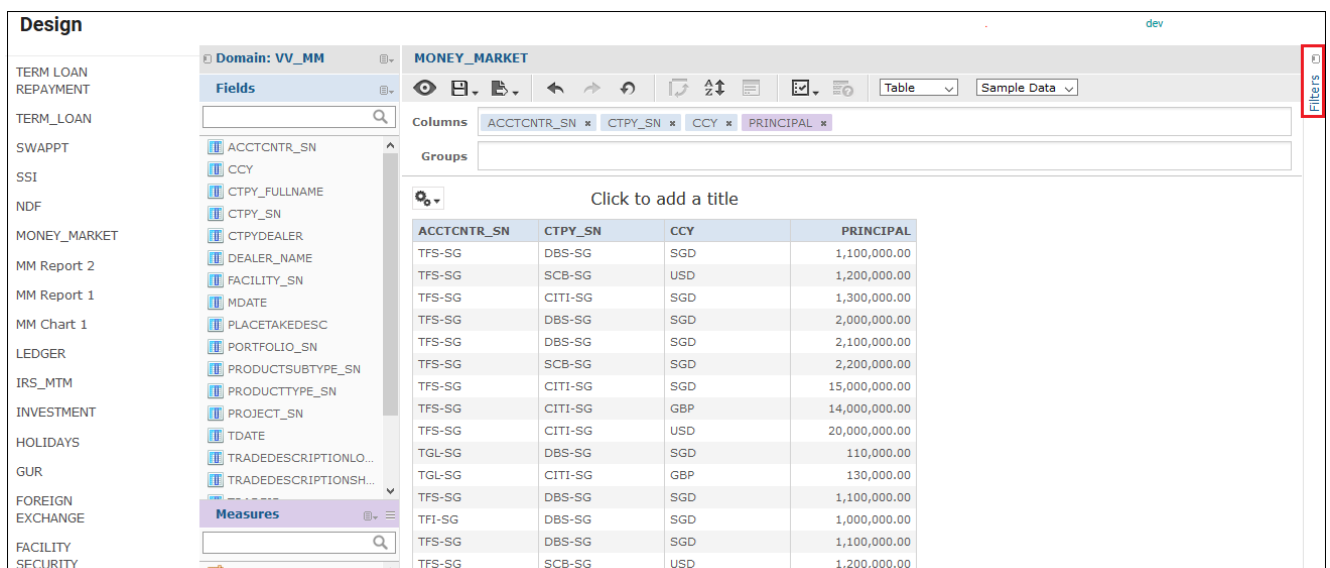
PROCEDURE

1. From the Main Menu, select Reporting > Dynamic > Design.
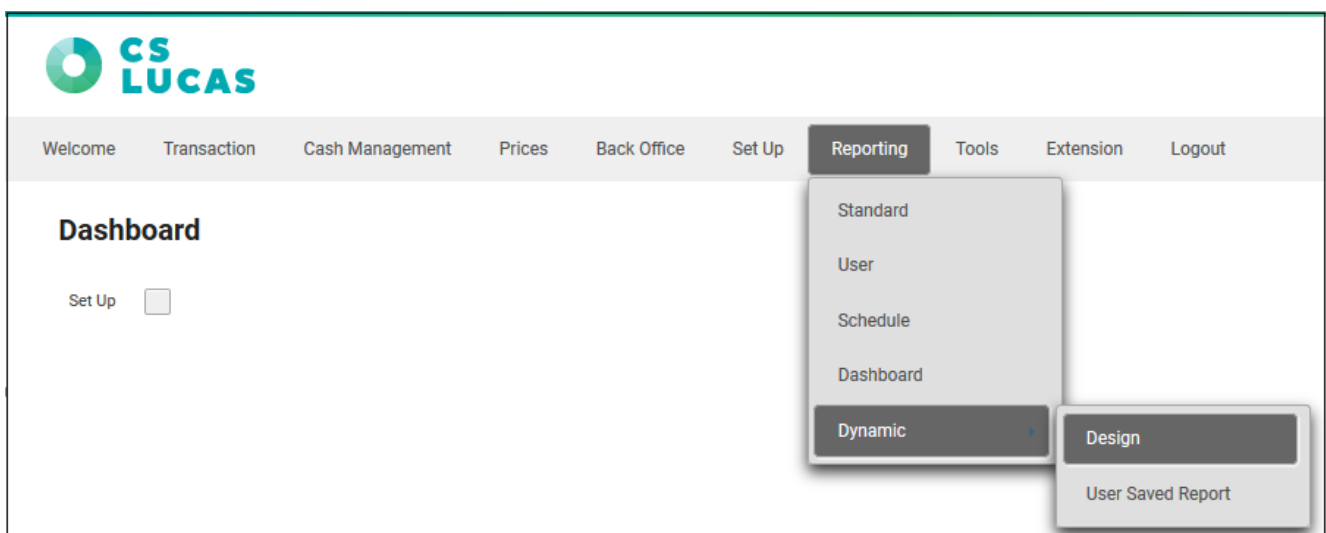
2. The Ad Hoc Report Design screen displays. You will see a list of available views for transactions/ static data that you can create ad hoc report design from.

3. Click on a view. For example, MONEY_MARKET. Ad Hoc Report Designer displays.

4. Drag and drop the fields required to the Ad Hoc Report Designer.

5. To create custom filters, click on the Filters at the top right of the Ad Hoc Report Designer.

6. Filter panel displays. Drag and drop a field to the Filter panel. For example,

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7. Select to filter by Lend/Place for example. Click Apply.

8. Data is now filtered by Lend/Place only.

9. To group data, drag and drop the field to Groups field or right click the field, click Add as Group.

10. To provide a title for the report, click to add a title. Key in the report title.

11. To save Ad Hoc Report View, click on the Save icon and select Save Ad Hoc View.
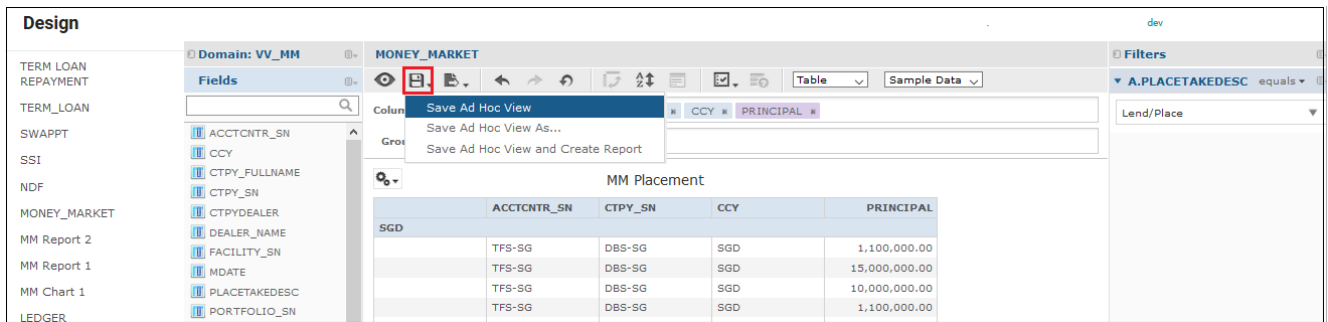
12. Ad hoc report can be generated and exported in various formats as follow. Click on Export and select the format required.

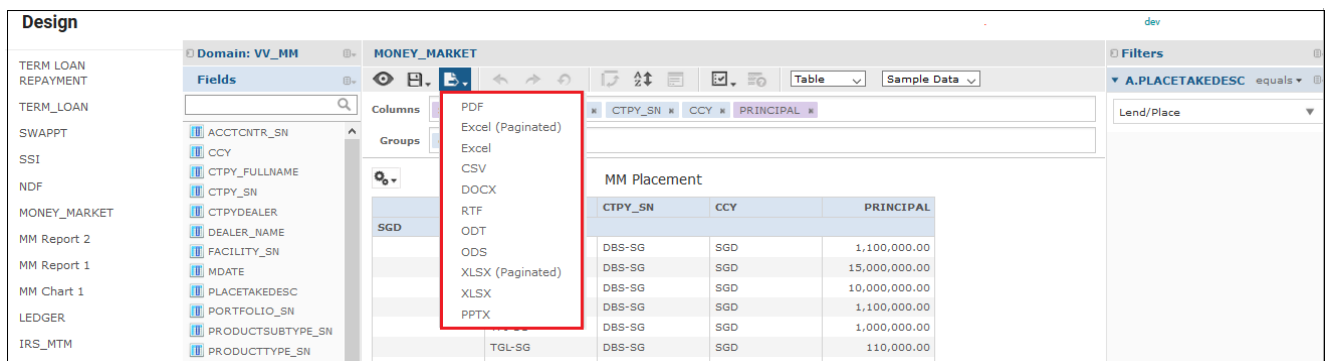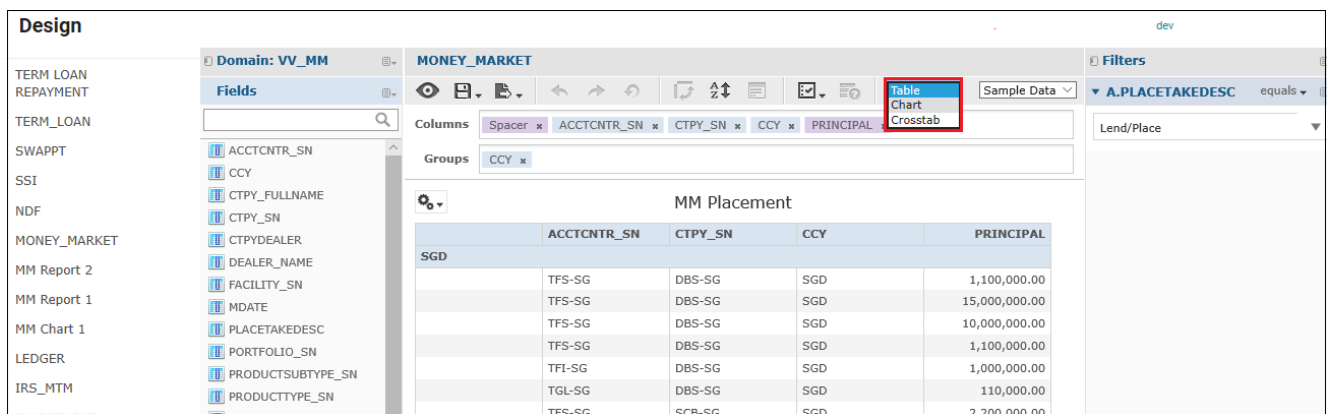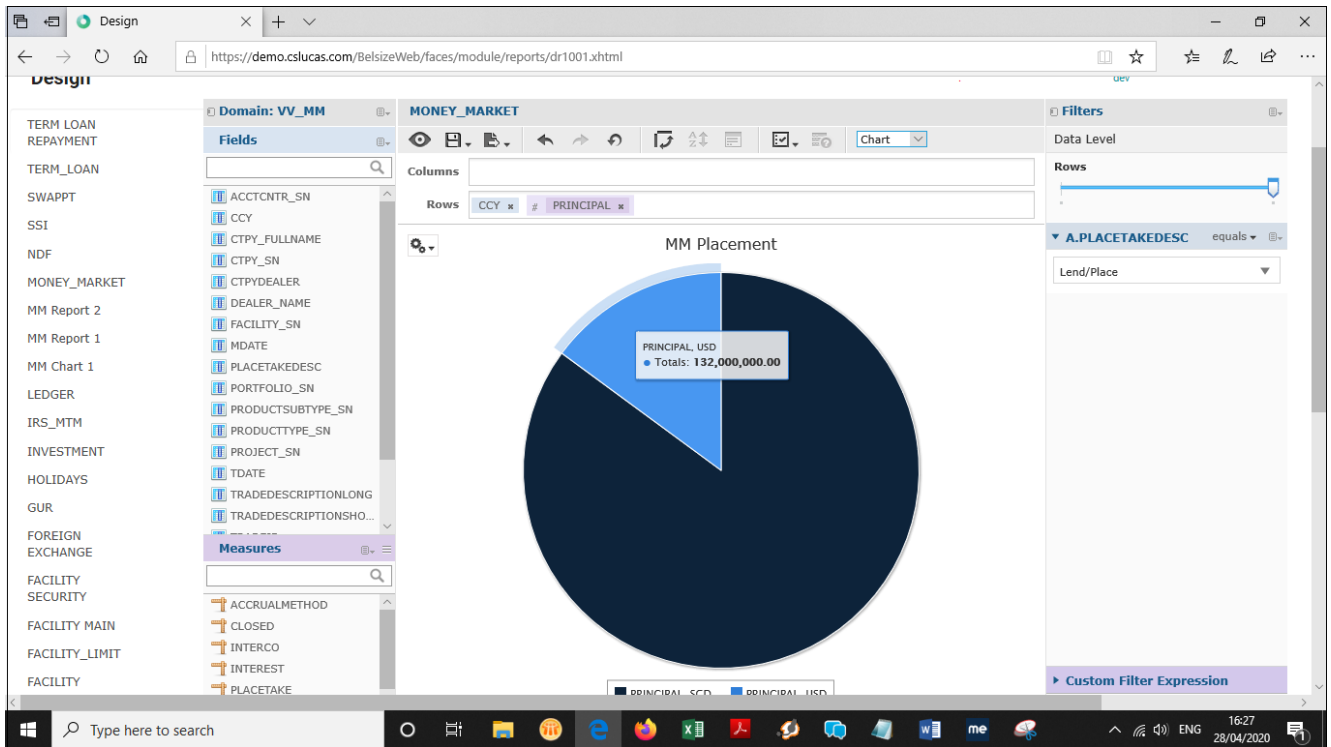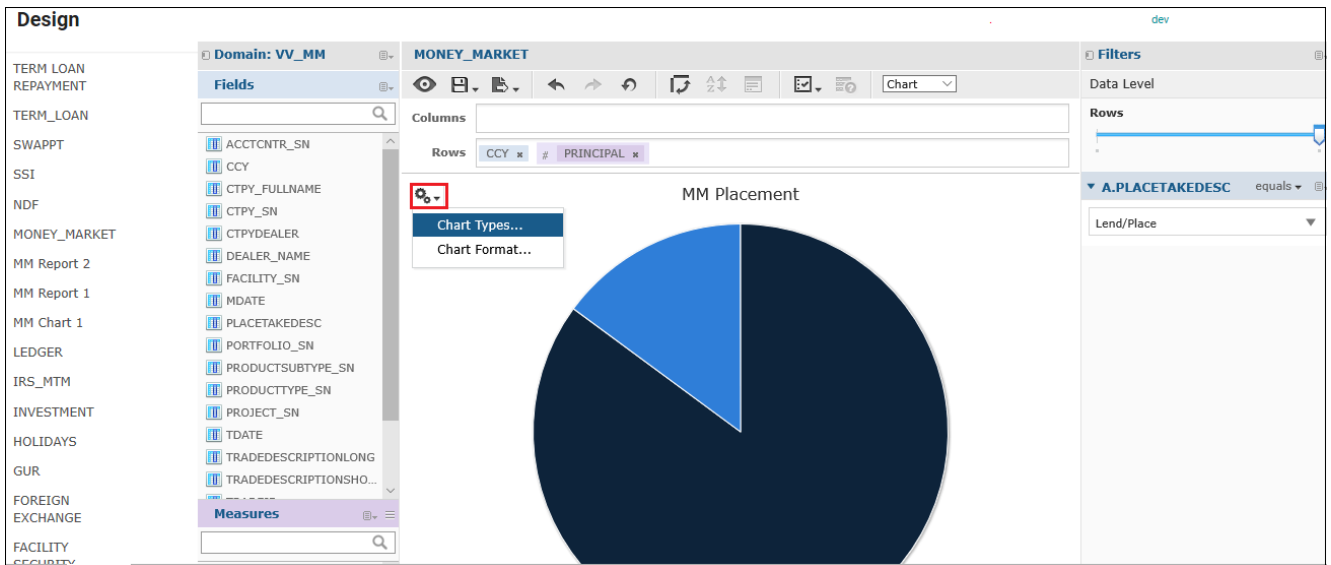13. Users may also choose to generate charts. Select Chart from the drop down as shown below.
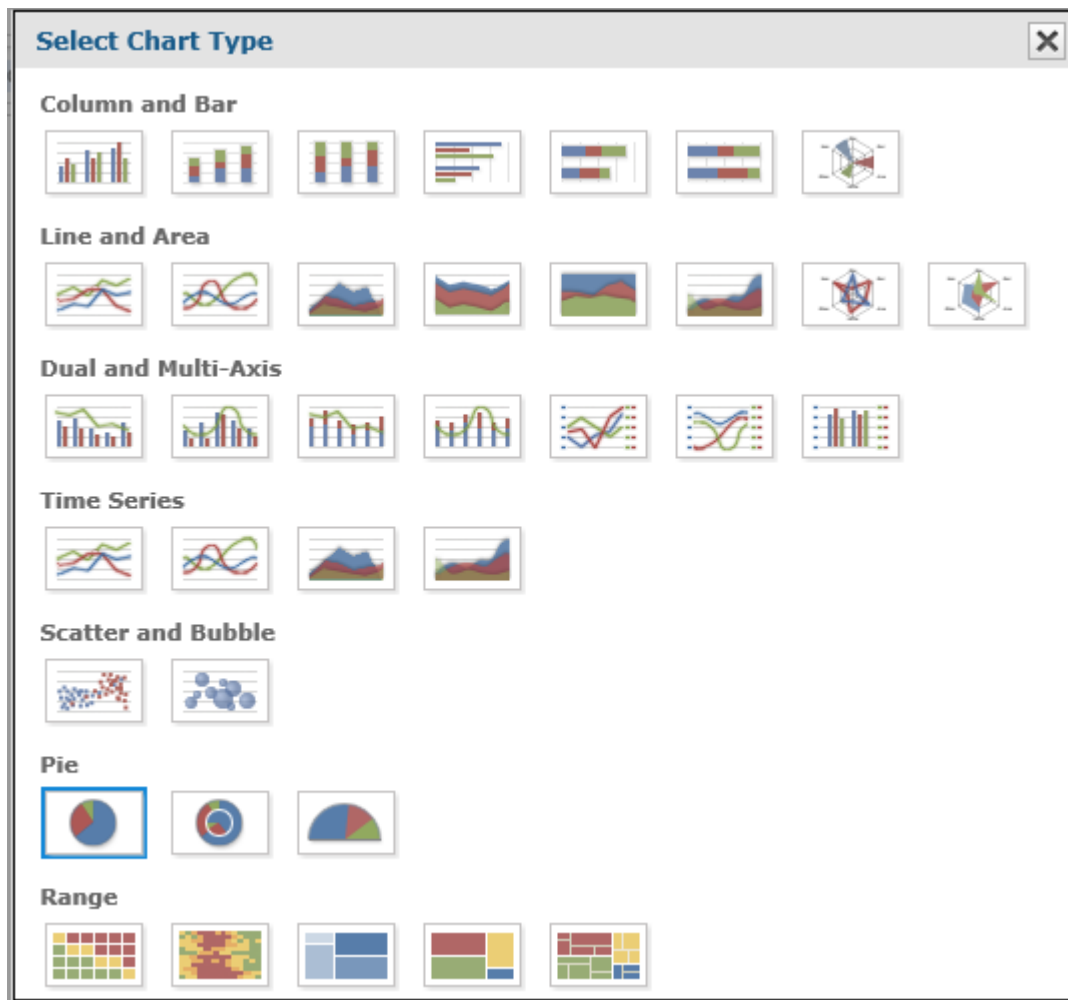

14. Add and remove the fields required accordingly.

15. Click on the Setting icon to select the Chart types.

User may choose the chart types available in the pop up.

FREQUENTLY ASKED QUESTIONS

RELATED INFORMATION

CHANGE HISTORY

Date	By	Changes
25-Jun-2019	Don	Created.
20-Nov-2019	TS	Updated.
28-Apr-2020	Lyra	Updated with latest screen shots.