

QUICK START USER GUIDE

Advanced Customized Reporting Tool

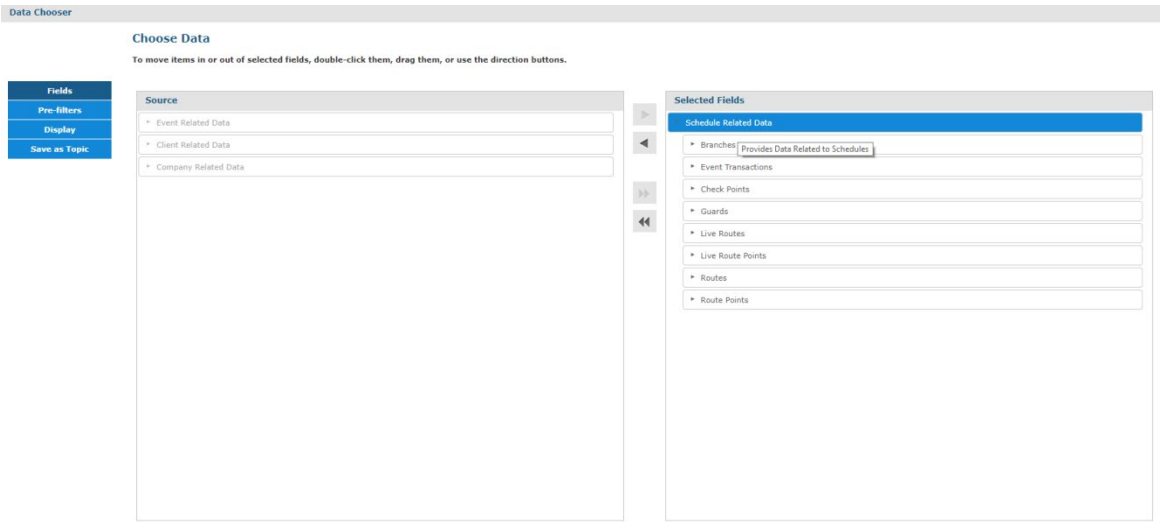


Bi / Analytics

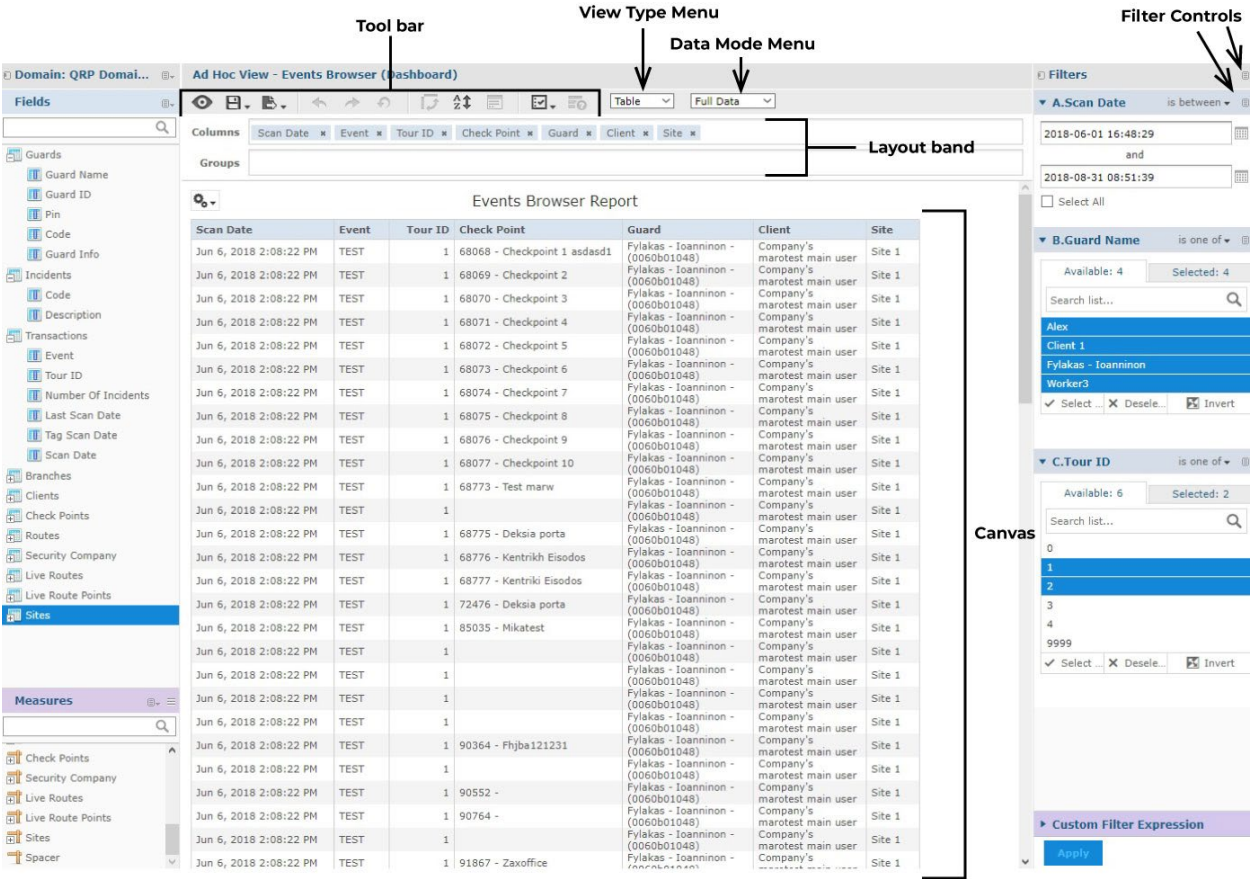
Create your very own reports!

By navigating to the **Bi/Analytics** section in your web app you will have access to our brand new menu about custom reports. Select the **Report Designer** option and a “Select Data” pop-up window will appear; choose your Company’s Domain and you will be navigated to the “Choose Data” screen.

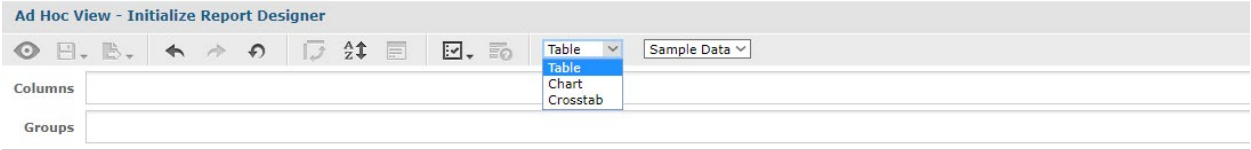
On the left of this screen you will be asked to select one of the pre-defined data groups each corresponding to a group of fields available. You can select entire tables of data or specific fields and use them in tables, crosstabs or even charts! Use them as filters to customize your report even more.



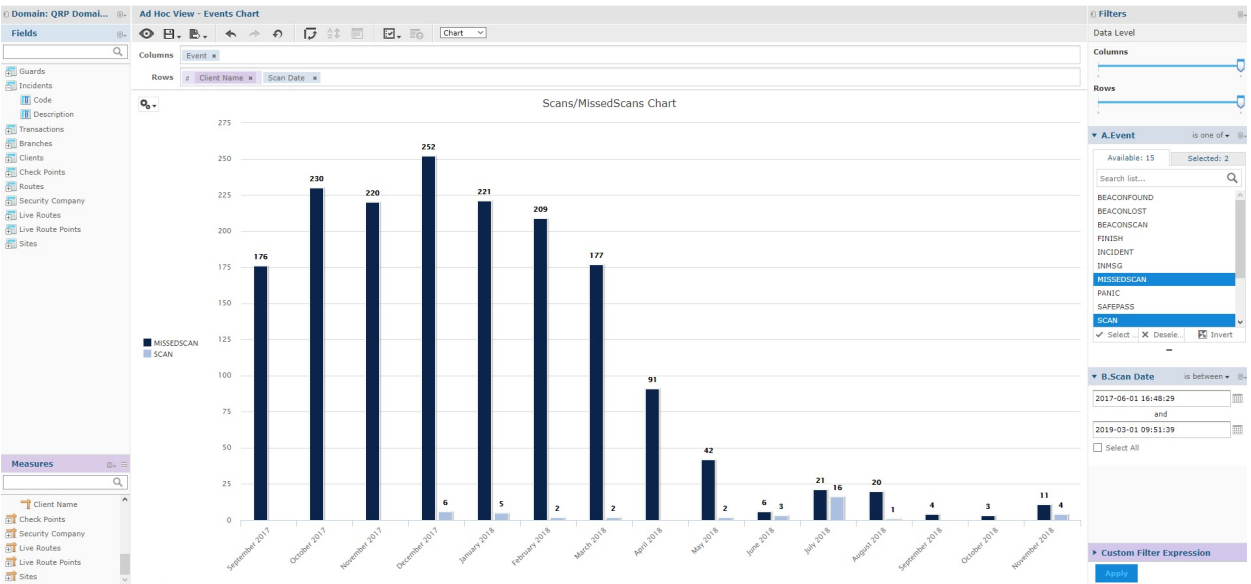
Example: By selecting the “Event Related Data” you can create a report that contains all Events sent by a specific Worker for a specific time period.



First select the type of report you want to create by selecting one of the 3 available options (Table, Crosstab and Chart).



Select the **Chart** option to create more visual-appealing data like pie charts etc.

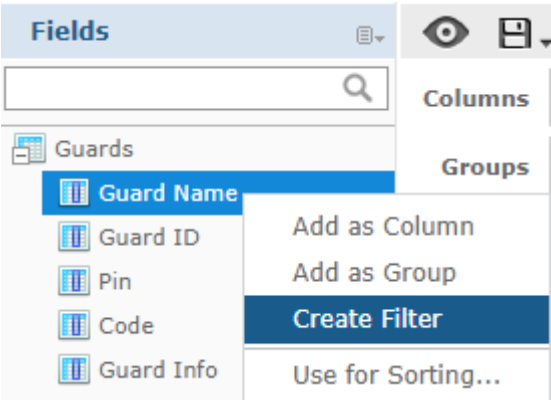


Navigate to the left of the screen and select the fields you want to use in your report. With a simple drag and drop you will be able to visualize your data.

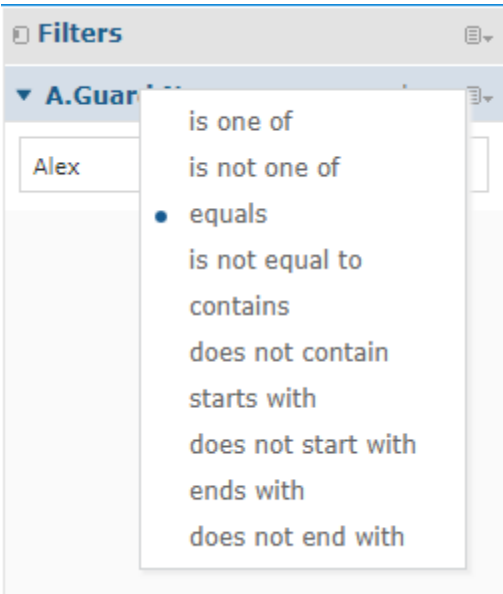
You can select to use the tables as fields or measures and visualize them in columns or rows to experience a fully customized report.

Filters


Right click on the field you want to use as a filter and select the “create filter” option:

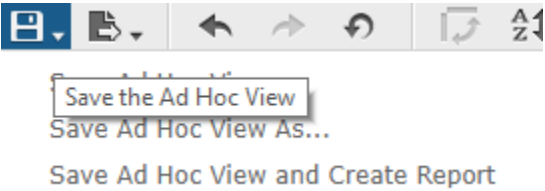


The filters will be shown on the right side of the screen where you will have access to multiple forms of filtering. Click on **Apply** to apply the changes in your report:



The changes will be applied immediately to your report and the new filtered data will be shown.

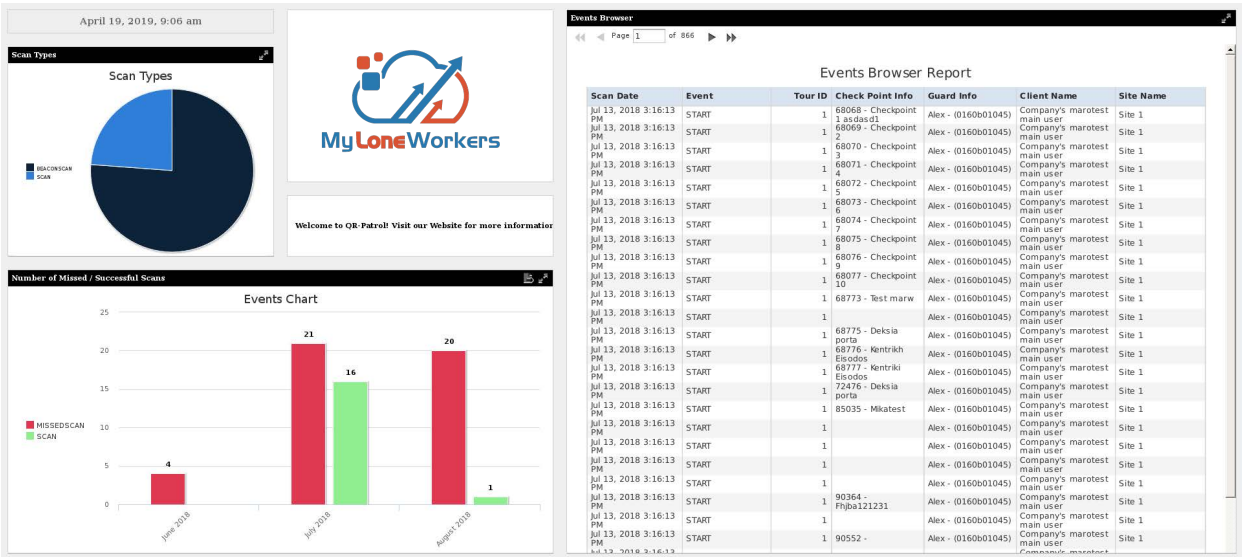
Add a title and visualize the result by selecting the  icon to display the generated report before you save it. Click on the **Save** button and save your report using your very own template.



All your reports are stored in your **Repository**, a personal space where you can control all your created content.

Dashboards

Navigate to the BI/Analytics menu and the select the **Dashboard Designer** tab. You will be navigated to the Dashboard screen. Dashboards display several reports in a single, integrated view. A dashboard can include other dashboards, input controls for choosing the data displayed in one or more frames, and custom frames that point to URLs for other content. By combining different types of related content, you can create appealing, data-rich dashboards that quickly convey trends.



Example of a simple dashboard

Drag and drop your reports and arrange them as you like inside the dashboard. Use images, text, charts and hyperlinks to other sites to enrich your dashboard even more.

Repository

MyLoneWorkers Gold users will now have their own personal space. There they will be able to see, save, edit and delete all the Ad Hoc Views, Reports and Dashboards they have created and arrange them according to their needs.

Scheduling

MyLoneWorkers provides you with the unique feature of automatically executing your reports according to a time diagram that suits your needs. Navigate to your Reports folder and left click on the report you want to create a schedule for. You will be then navigated to the Schedule screen where you can decide the recurrence of the execution of the report, the output and the possible recipients that will receive the executed reports by email.

Select the **Create Schedule** option:

Scheduled Jobs: Incident Report						
Back	Create Schedule	Run Now	Refresh List			
Job ID	Job Name	Owner	State	Last Run	Next Run	Enabled

You will be then navigated to the Schedule Creation Page where you can fully configure the scheduling of your report:

New Schedule

Schedule

Parameters

Output Options

Notifications

Schedule For: Incident Report

Schedule Start

Start Date:

Immediately

On Specific Date:

Time Zone:

Etc/UTC - Coordinated Universal Time

Recurrence:

Recurrence Type:

None

Save

Cancel

Configure the Output to export your report:

New Schedule

Schedule

Parameters

Output Options

Notifications

File name (required):

Incident Report

Description:

Time Zone:

Etc/UTC - Coordinated Universal Time

Output Location:

(Default)

Formats:

CSV

DOCX

Excel (Paginated)

Excel

HTML

ODS

ODT

PDF

RTF

XLSX

XLSX (Paginated)

PPTX

File Handling:

Overwrite Files

Sequential File Names by Timestamp

Timestamp Pattern:

yyyyMMddHHmmss

Output Destination

Output To Repository

/My_organization/dev-tests/Final_QRPatrol_Report

Browse...

Output To Host File System

Output To FTP Server

Server Address:

Save

Cancel

Finally, take full advantage of our unique feature to set up email configurations to the recipients of the reports:

New Schedule

ScheduleParametersOutput OptionsNotifications

Schedule For: Incident Report

Email Notification

Send report when scheduler runs

To:

Use commas to separate addresses

CC:

BCC:

Subject:

Message:

☒ Include reports as repository links in email body

☐ Include report files as attachments

☐ Include report files as ZIP attachment

☐ Include HTML report in email body

☐ Do not send emails for empty reports

Send job status notifications

To:

Use commas to separate addresses

Subject:

☐ Send success notification

Success Message:

☐ Send failure notification

Failure Message:

☐ Include report job information

☐ Include stack trace

Save

Cancel

Hint: The scheduled reports will appear in your repository with an 🕒 icon on the left.