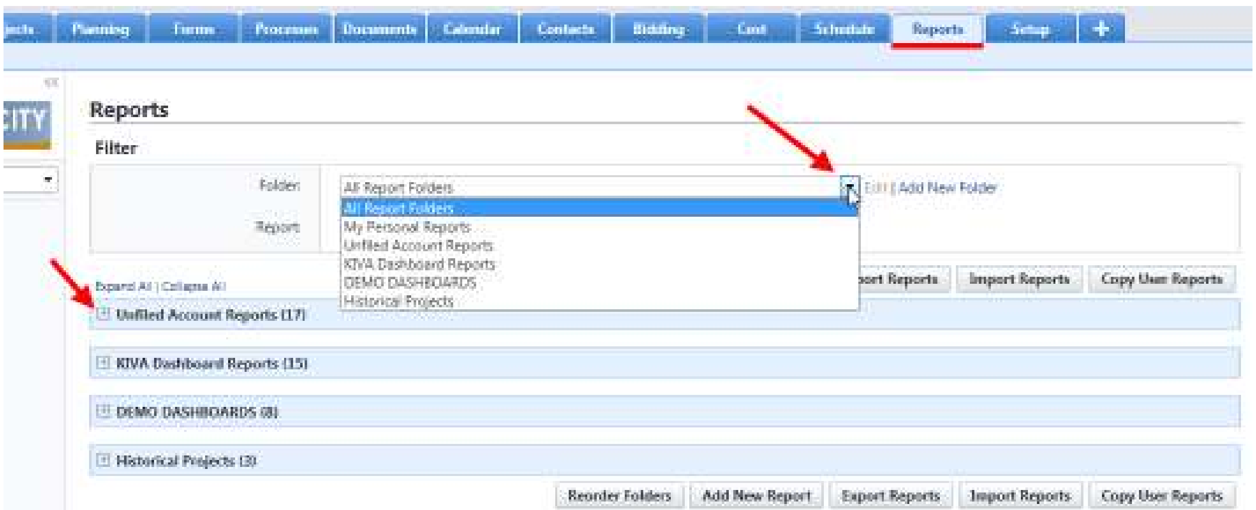
Report Module

The e-Builder Reports module allows you to view reports on all aspects of your projects in e-Builder. Reports are lists, summaries, and analyses of your data, which you can display or print. The module enables any e-Builder user to easily report on real time, up-to-date information recorded in any of the e-Builder modules that users have access to.

1. *Click on the **Reports** tab.*
2. *To view the contents of a single folder, click on the drop-down list in the middle of the screen and select the name of the desired folder. You can also access report folders by clicking the expand button next to the name.*

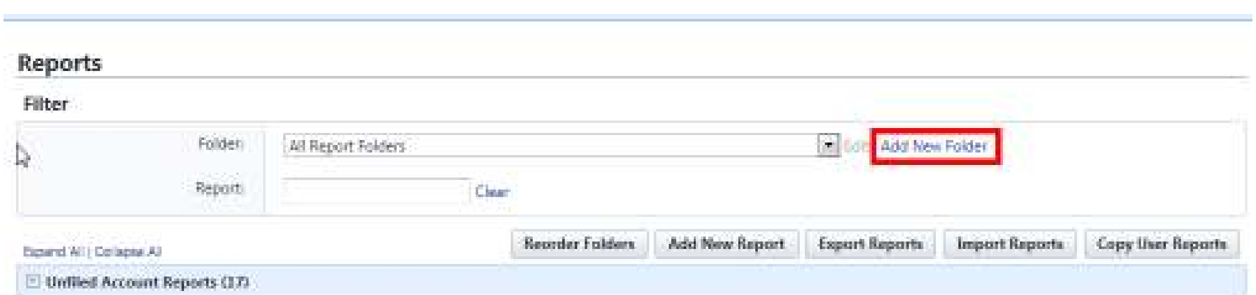


Organizing your Reports

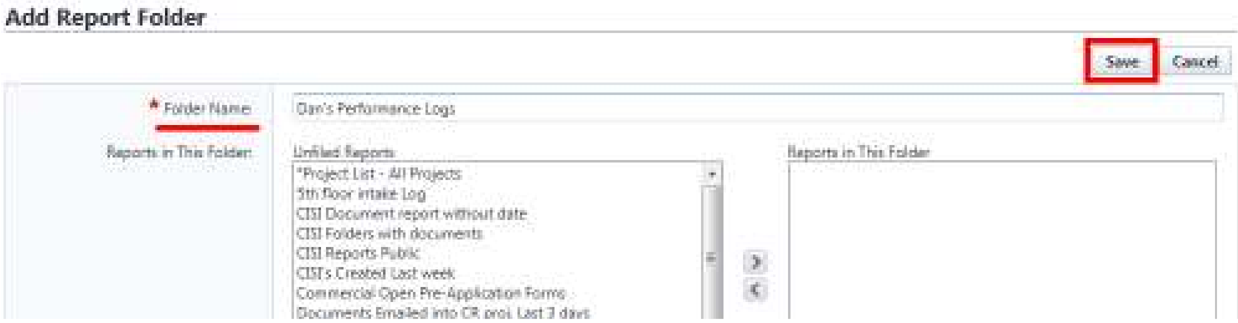
Each report saved is stored in a report folder, which is used to separate the reports into functional categories.

Creating a Report Folder

3. *From the Reports Tab, click the **Add New Folder** link.*



4. *Enter a name for the new report folder. Click **Save.***



Reordering Report Folders

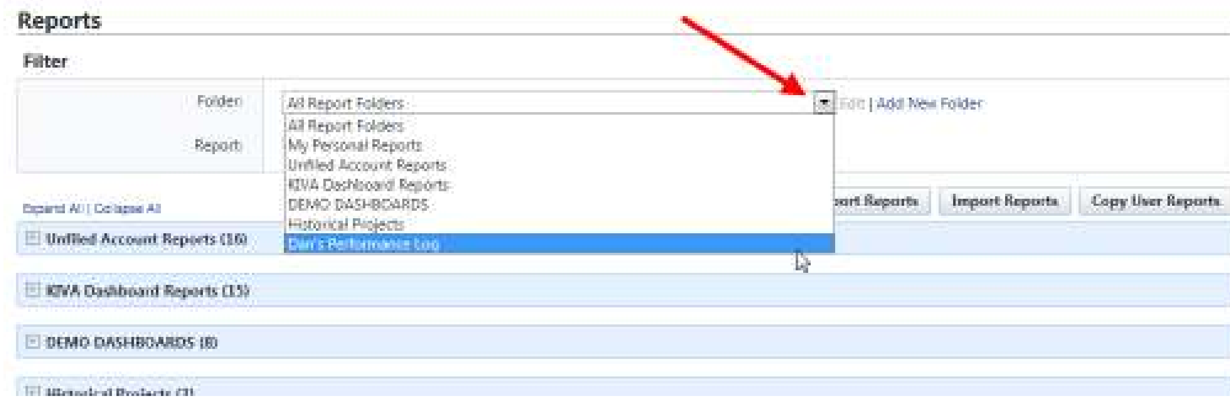
To change the order in which are reports are displayed, Click **Reorder Folders**.

5. *Click on the name of a report folder.*
6. *Click the Top, Up, Down, or Bottom button to change the order in which they are listed, if desired.*

7. *When finished, click **Save**.*

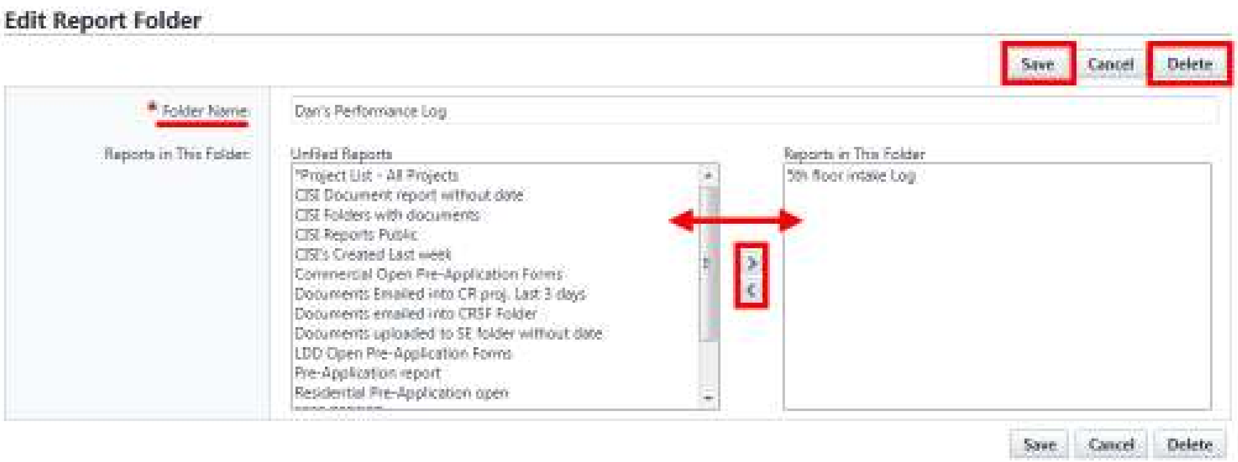
Editing/Deleting a Folder

8. *Select the folder name in the drop-down.*



9. *Click the **Edit** link located to the right off the folder name. On the Edit Report Folder screen you can:*

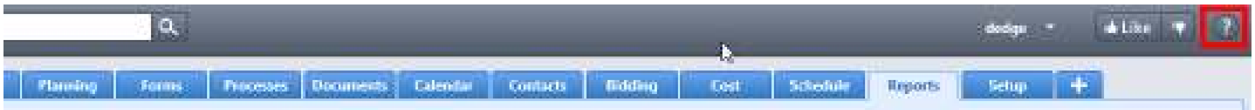
- *Edit the Folder Name.*
- *Move Reports to or from the Unfiled Reports folder by choosing the report name and using the Add/Remove arrows*
- *Delete the Folder by clicking the delete tab. A confirmation dialog box will be displayed asking you to confirm your selection. Click **Yes, Delete the Report Folder** button.*



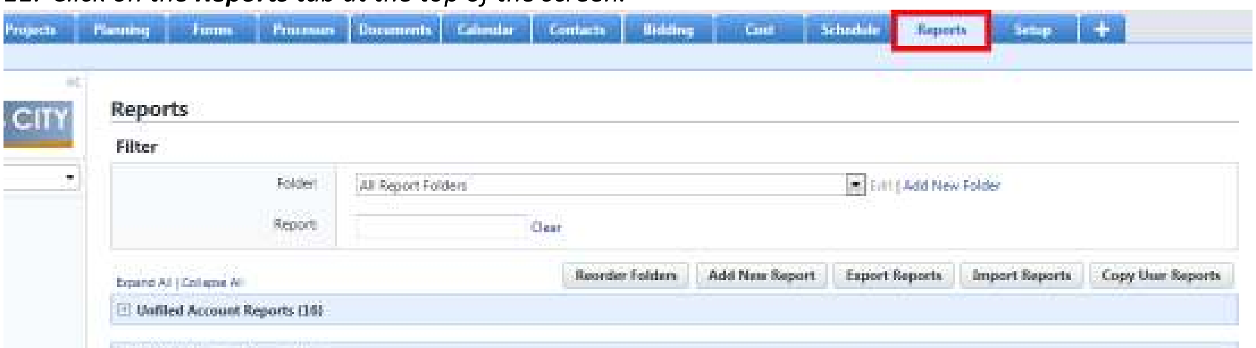
10. *Click **Save**.*

Creating a New Report

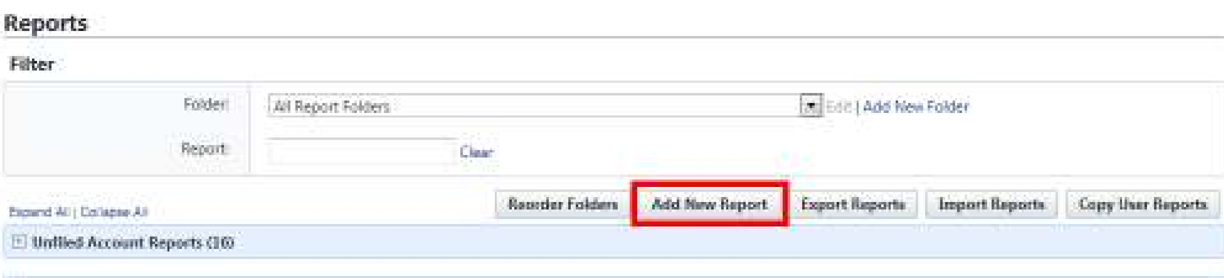
Users can create their own reports by using the Report Wizard, which is a series of screens that walks you through creating a customized report that displays only the information you need. As you complete each step, click **Next**. You can click the **Previous** button to go back to the previous step or use the 'Jump to step' drop-down menu to skip steps. (Don't forget to use the Help (?) in the top right corner of the screen for any questions!)



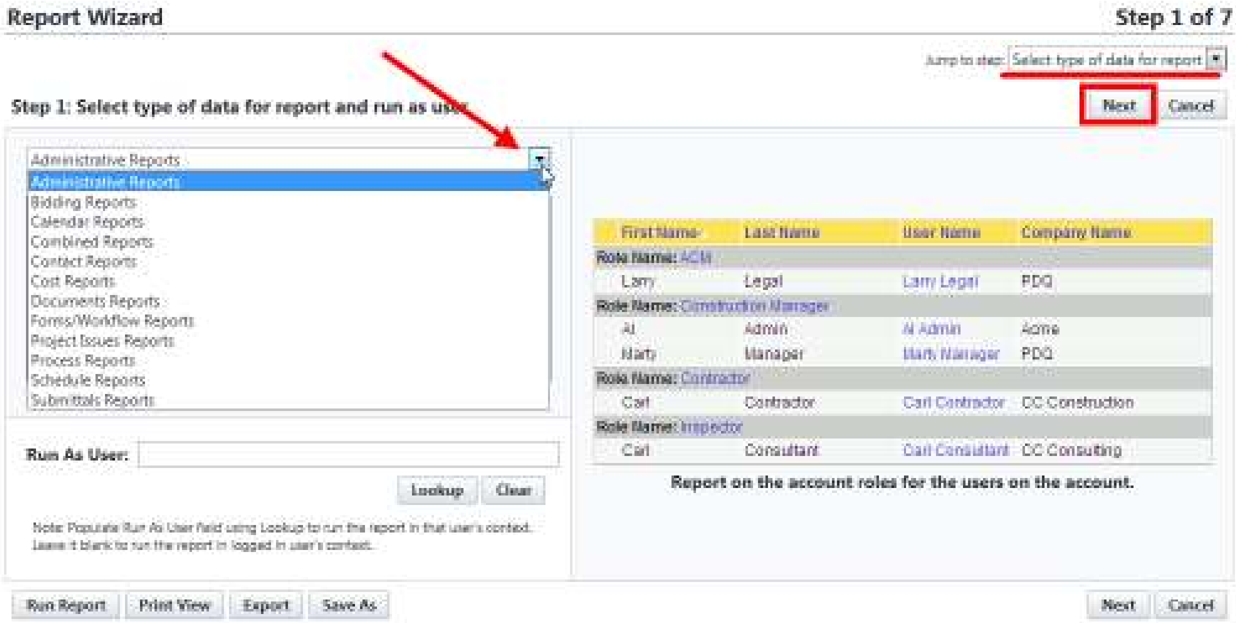
*11. Click on the **Reports** tab at the top of the screen.*



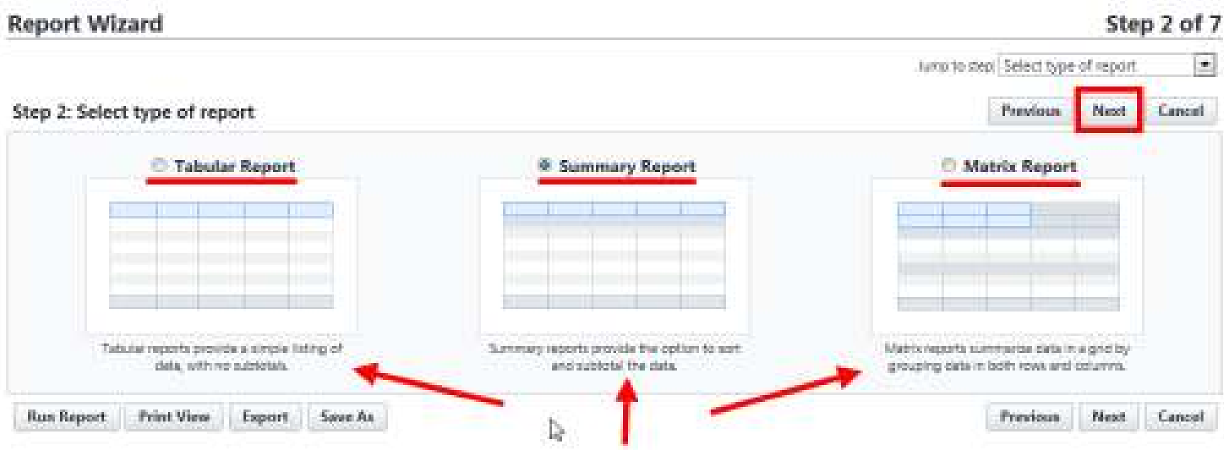
*12. Click on the **Add New Report** button. You will be directed to the Report wizard.*



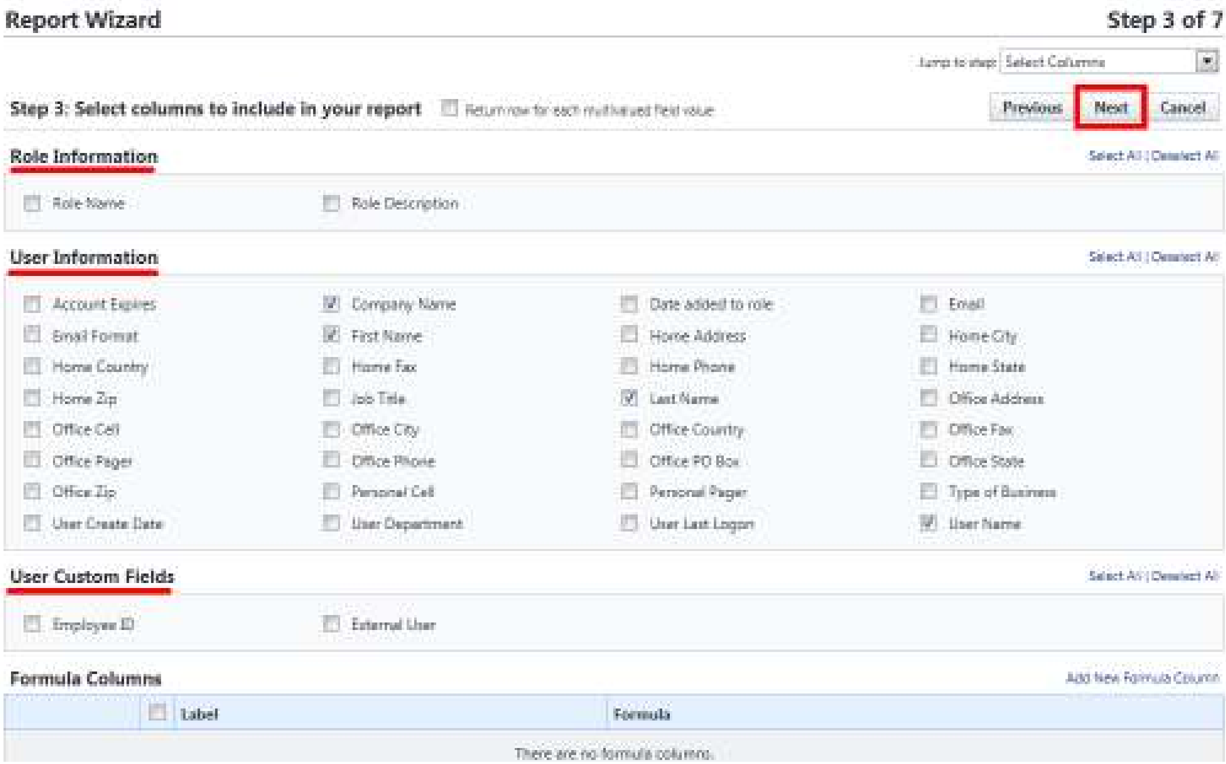
*13. In Step 1, click the drop-down menu and select the type of data that will be used to run the report, click the **Next** button.*



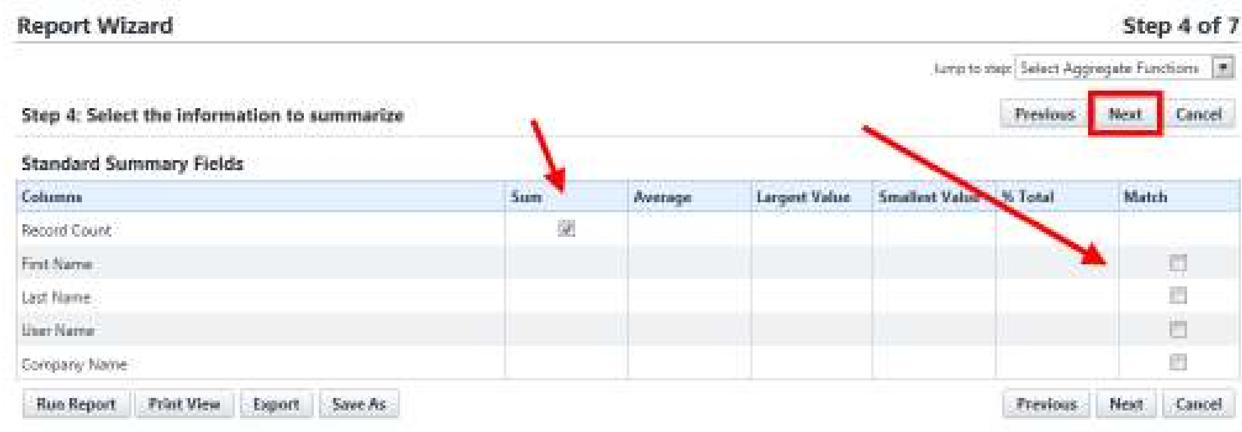
14. *In Step 2, click on the radio button for the type of report you wish to run. (Descriptions of each type are beneath the pictures) Click **Next**.*



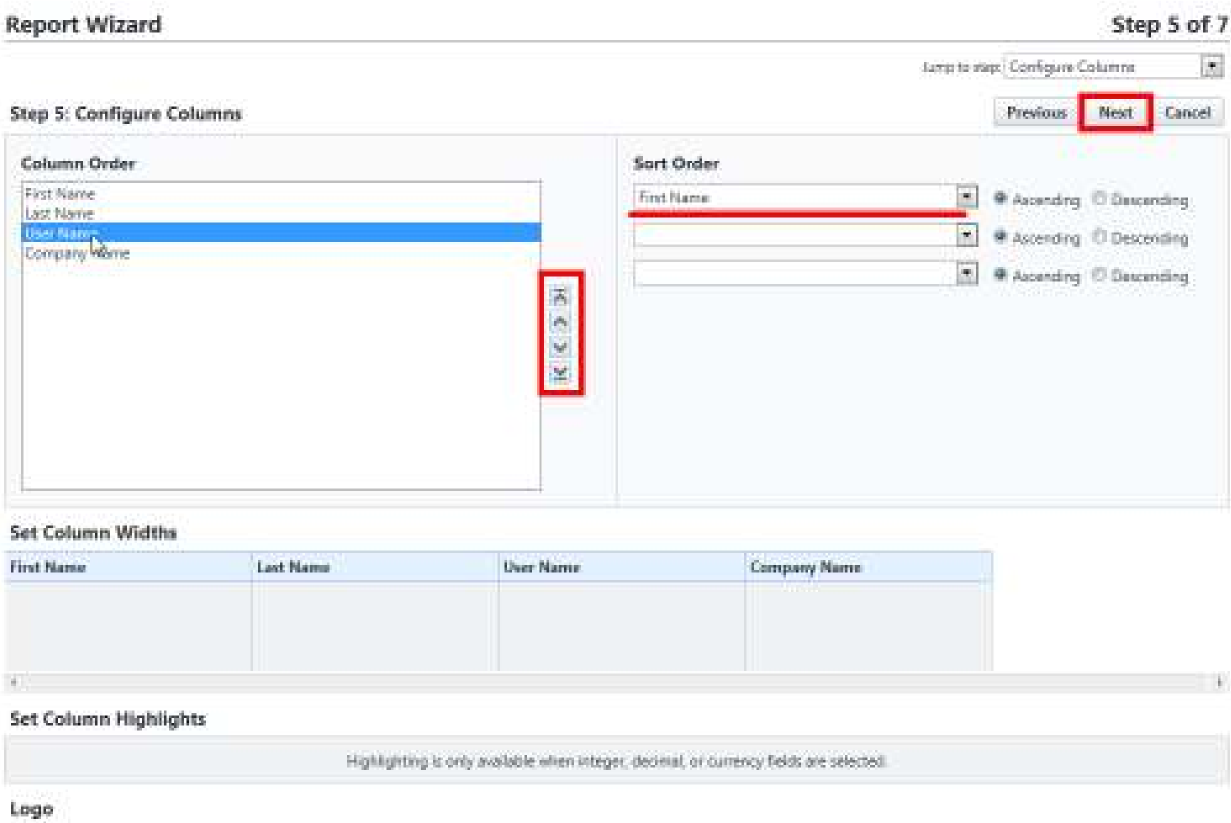
15. *In Step 3, select the columns to be included in the report by placing a check mark next to the column name. Click **Next**.*



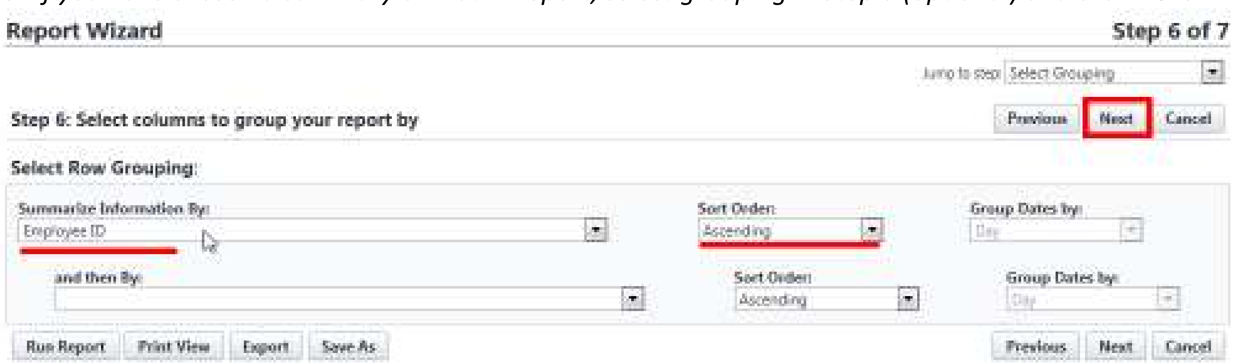
16. *In Step 4, select the aggregate functions to be included in the report. Click **Next**.*



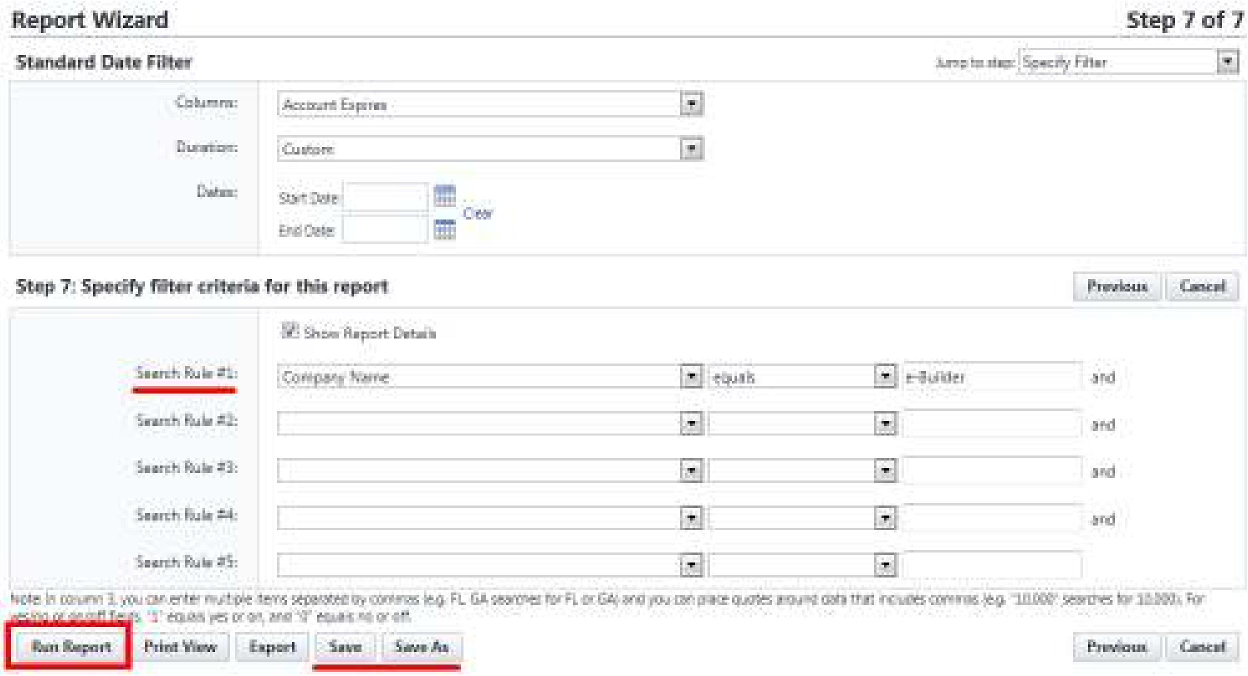
17. *In Step 5, choose the ordering of the columns by using the Top, Up, Down, and Bottom buttons.*



18. *If you have chosen a summary or matrix report, select grouping in Step 6 (optional) and click* ***Next****.*



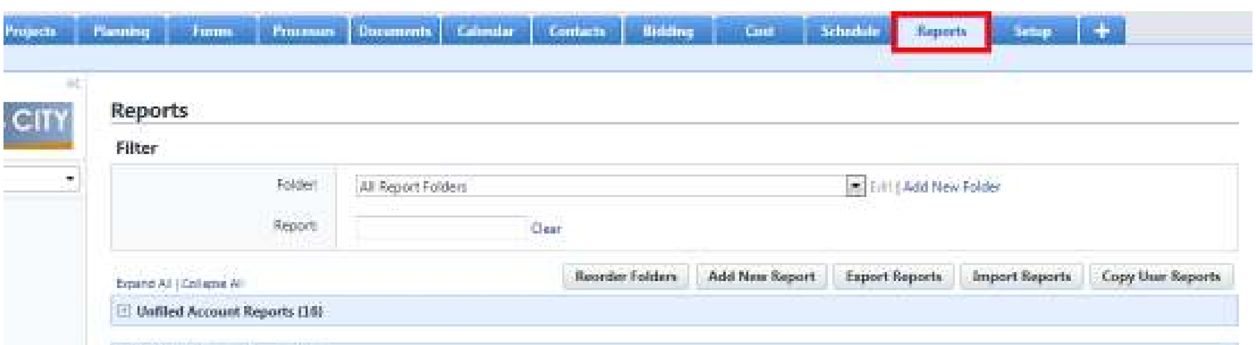
19. *In Step 7, specify filter criteria for the report.*



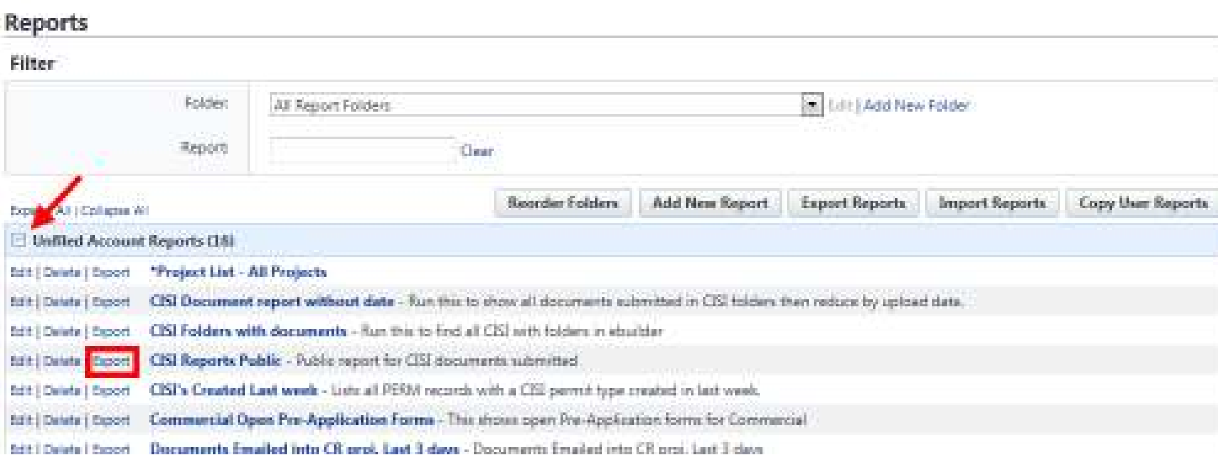
20. Click **Save As** and enter a name and description for your report.
21. Click **Save**.

Exporting a Report

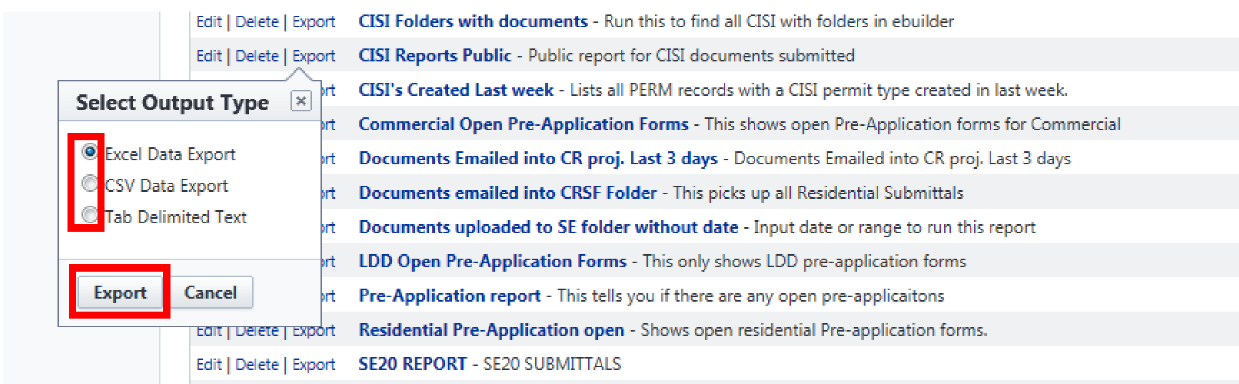
22. Click on the **Reports** tab at the top of the screen.



23. Expand folder to display desired reports and click **Export** to the right of report.



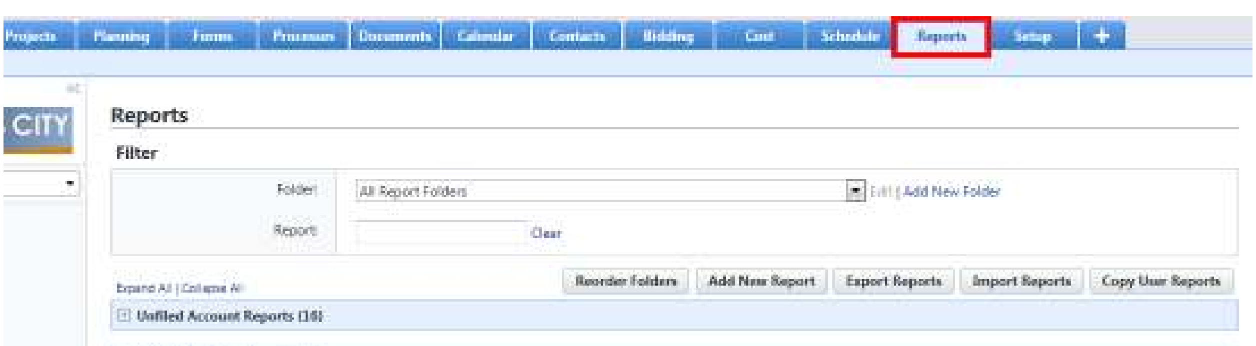
24. *Choose the type of file to export the report as and click* ***Export.***



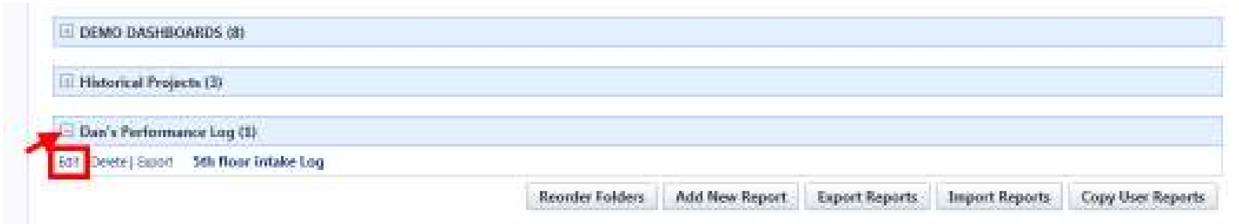
25. *Select* ***Open*** *to view in Excel or* ***Save*** *to save the file onto your computer.*

Editing an Existing Report

26. *Click on the* ***Reports*** *tab at the top of the screen.*



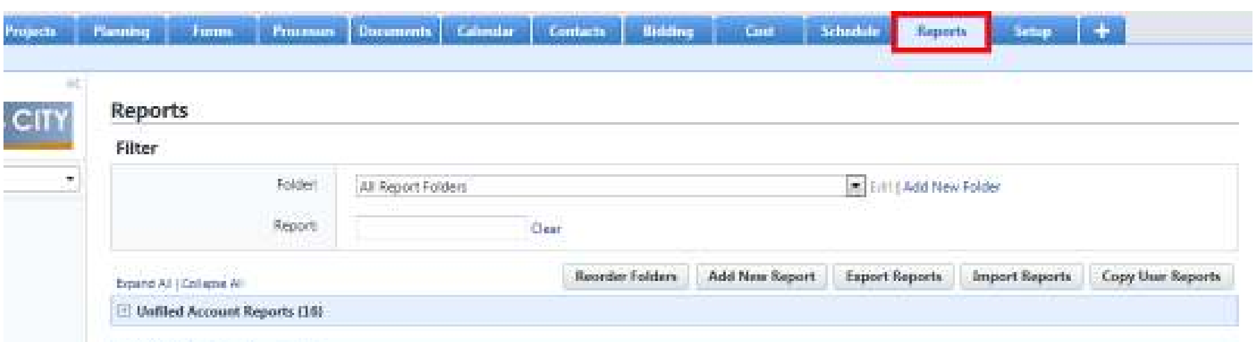
27. *Click on **Edit** next to the name of the report.*



28. *Modify any aspect of the report within the Report Wizard. (See Creating a New Report, above, for more information if necessary)*
29. *Click the **Save** or **Save As** (to rename) button .*

Running Reports

30. *Click on the **reports** tab at the top of the screen.*



31. *Click on the name of the report that you wish to run. The results of the report will be displayed on the screen.*

e-Builder

Expand All | Collapse All

Reorder Folders | Add New Report | Export Reports | Import Reports | Copy User Reports

- Unified Account Reports (16)
- KIVA Dashboard Reports (15)
- DEMO DASHBOARDS (8)
- Historical Projects (3)
- Dan's Performance Log (1)
  - Edit | Delete | Export **5th floor intake Log**

Reorder Folders | Add New Report | Export Reports | Import Reports | Copy User Reports

5th floor intake Log

Hide Details | Print View | Send | Export | Edit | Save | Save As

KANSAS CITY

Filter By:
Parent Folder Name equals **LDD Plan Intake Log, Commercial Plan Intake Log**
Date Uploaded is **Yesterday**

Parent Folder Name	Date Uploaded	File Name	File Description	Uploaded By	Company	File Size
Commercial Plan Intake Log (6 records)						
Date Uploaded: 07.16.2013 (6 records)						
Commercial Plan Intake Log	07.16.2013	201410116 -- Xpress Mart -- 2601 Swope Parkway -- 07-16-2013 at 09.36.06.msg	Submitted By Sarah Simmons (Sarah.Simmons@kcmo.org)	In, Emailed	N/A	5.0KB
Commercial Plan Intake Log	07.16.2013	5d1334d -- highlands of northview 4th plat -- na -- 07-16-2013 at 12.16.43.msg	Submitted By Carbetta Mitchem (Carbetta.Mitchem@kcmo.org)	In, Emailed	N/A	5.1KB
Commercial Plan Intake Log	07.16.2013	na -- 4326 roanoke -- roanoke condo -- 07-16-2013 at 12.48.40.msg	Submitted By Carbetta Mitchem (Carbetta.Mitchem@kcmo.org)	In, Emailed	N/A	5.0KB
Commercial Plan Intake Log	07.16.2013	201311023 -- Bank Liberty -- 9200 NW Barry Rd -- 07-16-2013 at 14.36.44.msg	Submitted By Sarah Simmons (Sarah.Simmons@kcmo.org)	In, Emailed	N/A	5.0KB
Commercial Plan Intake Log	07.16.2013	201210039 -- park reserve yellowstone condo -- 30th baltimore -- 07-16-2013 at 15.03.18.msg	Submitted By Carbetta Mitchem (Carbetta.Mitchem@kcmo.org)	In, Emailed	N/A	5.0KB
Commercial Plan Intake Log	07.16.2013	201311167 -- alta vista charter high school -- 2640 belleview -- 07-16-2013 at 15.04.17.msg	Submitted By Carbetta Mitchem (Carbetta.Mitchem@kcmo.org)	In, Emailed	N/A	5.0KB
LDD Plan Intake Log (2 records)						
Date Uploaded: 07.16.2013 (2 records)						
LDD Plan Intake Log	07.16.2013	NA -- Dollar General -- 85th & Holmes -- 07-16-2013 at 11.08.40.msg	Submitted By Sarah Simmons (Sarah.Simmons@kcmo.org)	In, Emailed	N/A	4.9KB
LDD Plan Intake Log	07.16.2013	na -- parvin road tif -- na -- 07-16-2013 at 12.13.24.msg	Submitted By Carbetta Mitchem (Carbetta.Mitchem@kcmo.org)	In, Emailed	N/A	4.9KB
Grand Totals (8 records)						

Hide Details | Print View | Send | Export | Edit | Save | Save As

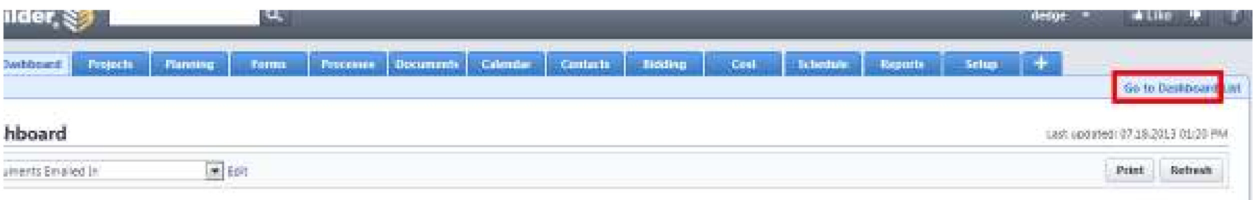
Dashboard Module

Dashboards are graphical representation of reports that present summary data in a visual format. They are typically used to provide overviews of program or project status and metrics. Dashboards are dependent on the information contained within the reports.

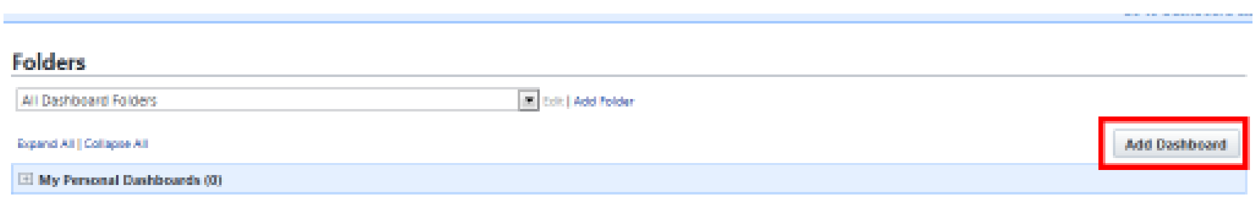
Creating a Dashboard

32. *Click the **Dashboard** tab at the top of the page.*

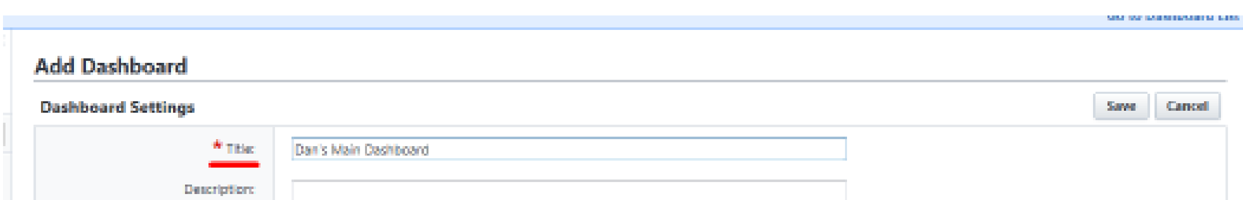
33. *Select the **Go To Dashboard List** link, to the right of View Dashboard.*



34. *Click the **Add Dashboard** button.*

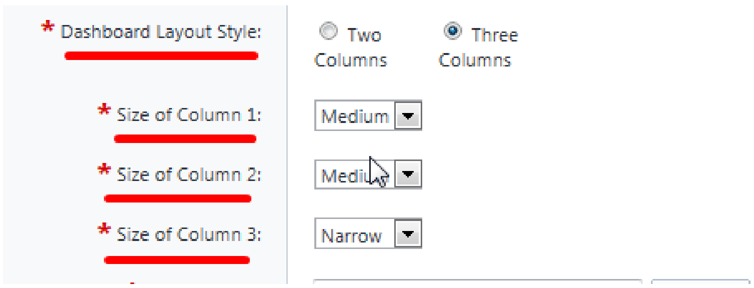


35. *Type a Title for the dashboard.*

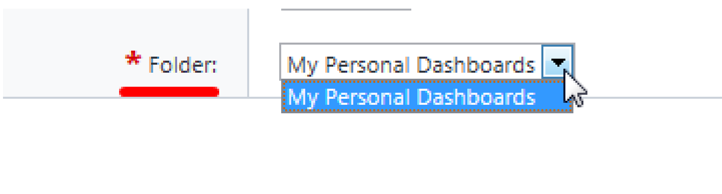


36. *Select the Layout Style: Two or Three columns. Select column width: Narrow, Medium, Wide, or Custom.*

e-Builder



37. *Select the folder to store the dashboard in.*



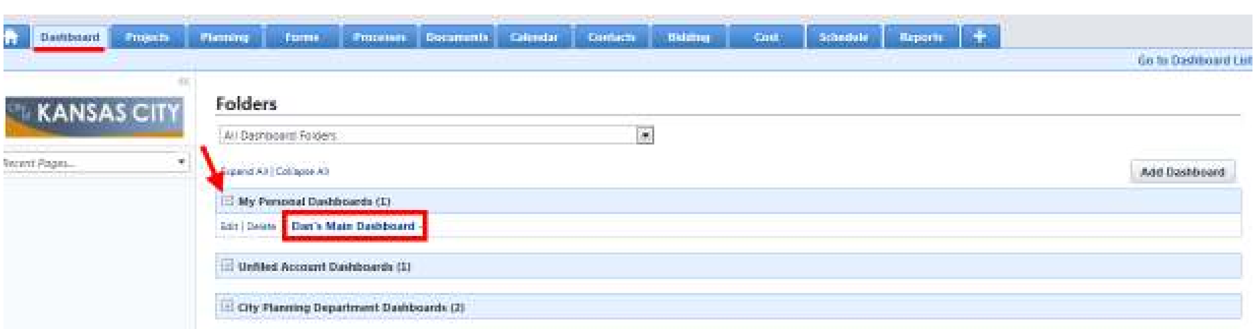
38. *Click the **Save** button.*

Dashboard Items

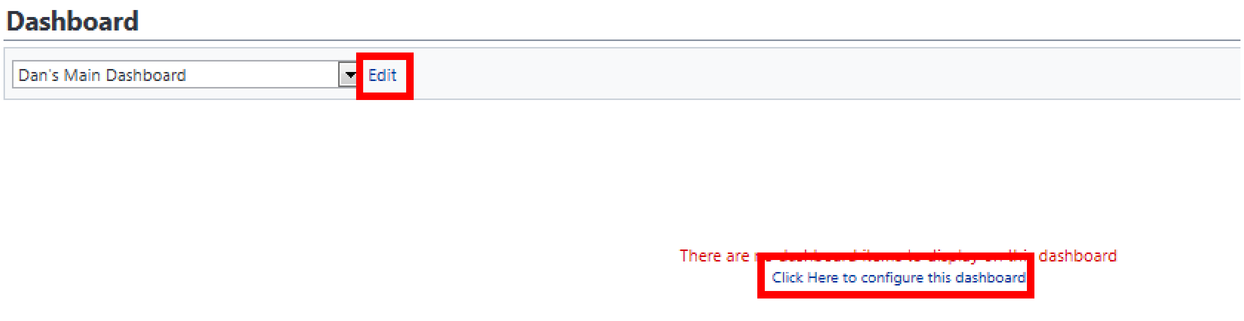
Once you have created your Dashboard, you have to add items to it. Dashboard items are the individual graphs that summarize the data.

To add a dashboard item:

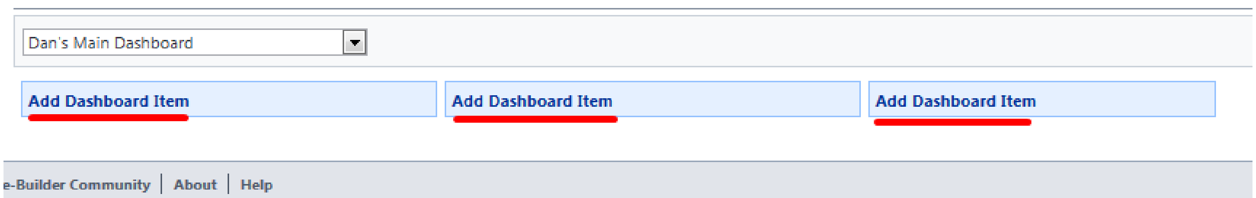
39. *Select the name of the Dashboard.*



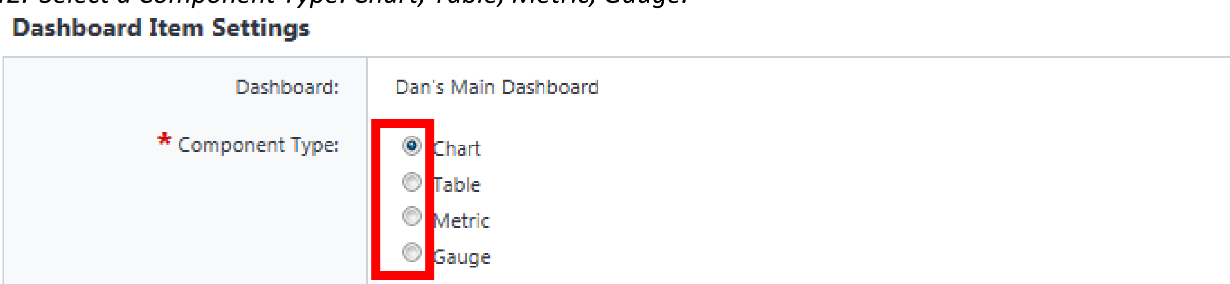
40. *Click the **Edit** link or the **Click here to configure this dashboard** link.*



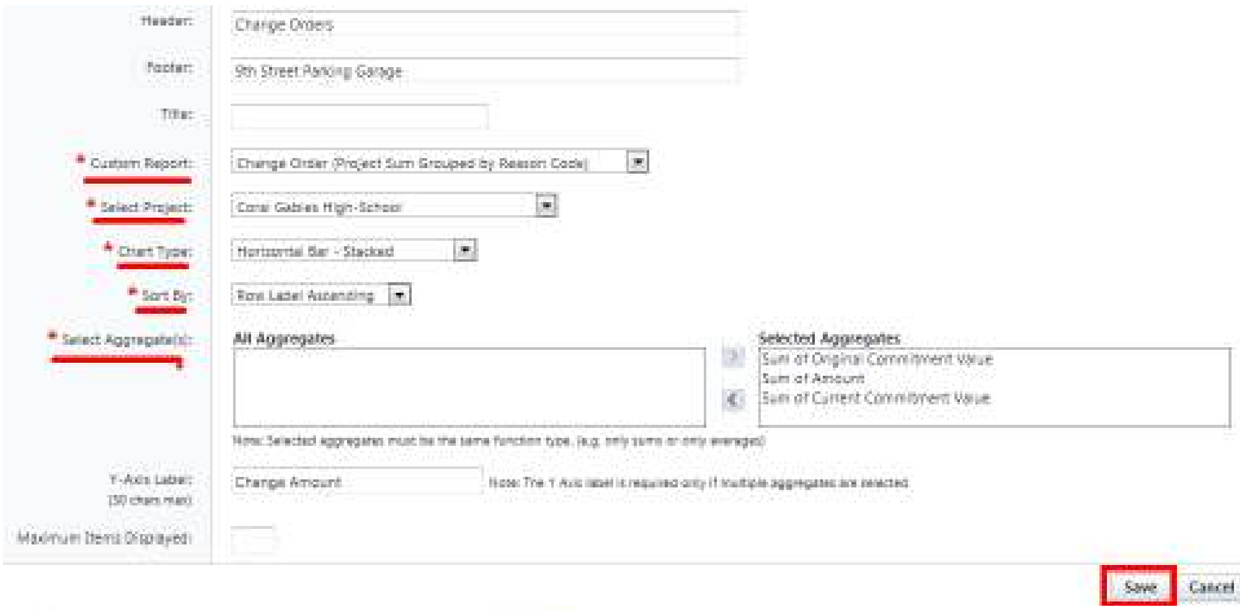
41. *Click the **Add Dashboard Item** for the column in which the dashboard should be displayed.*

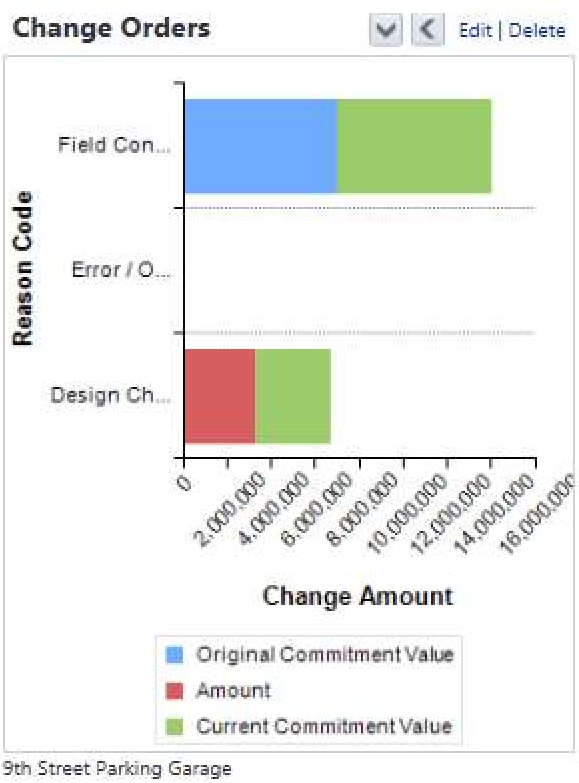


42. *Select a Component Type: Chart, Table, Metric, Gauge.*



43. *For Chart:*
    - *Select Report, Chart Type, and Sort By (Other fields are optional)*
    - *Click **Save***





44. For Table

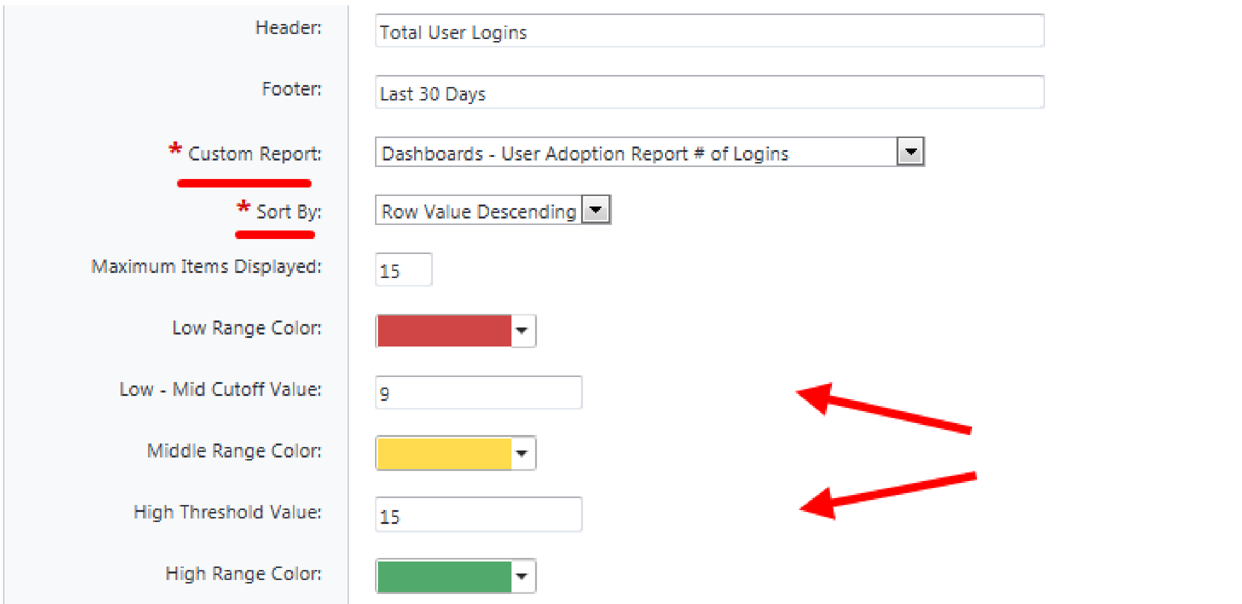
- ➢ *Select Report and Sort By*
- ➢ *Click Save*

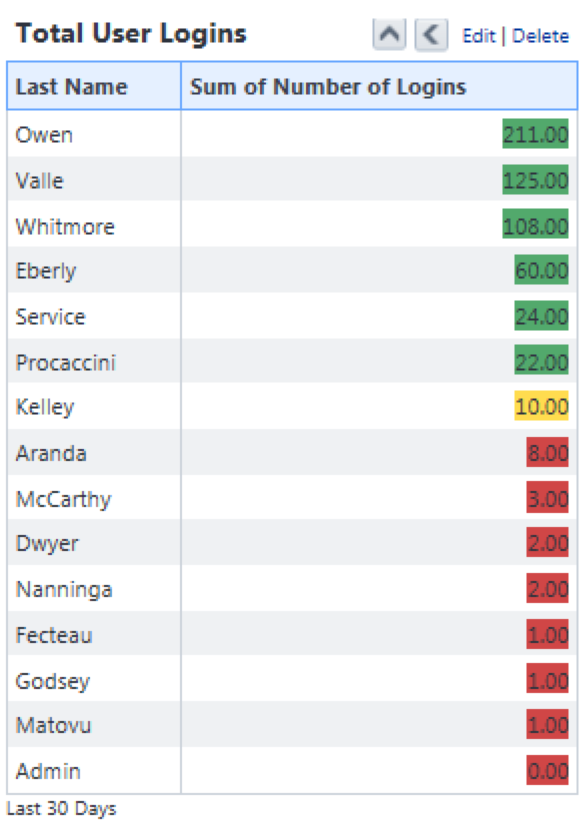
Header:	Project Accesses
Footer:	
* Custom Report:	Dashboards - Project Accesses
* Sort By:	Row Label Ascending

Project Accesses Edit | Delete

Project Name	Sum of Project Accesses
Adams University Classroom Renovation	177.00
Anderson School Building Renovations	100.00
APWA Renovation	25.00
Baptist Hospital Cath Lab Remodel	122.00
Beamont Waterway	81.00
Boulder Baptist Hospital	89.00
Brandon Park, Downtown Denver	57.00
Campbell Cancer Research	265.00
Central Plant Roof Replacement	47.00
Clarke Testing Center	16.00
Claude Moore	173.00

45. *For Metric:*
    - *Select Report, Sort By, Range Numbers & Colors*
    - *Click **Save***



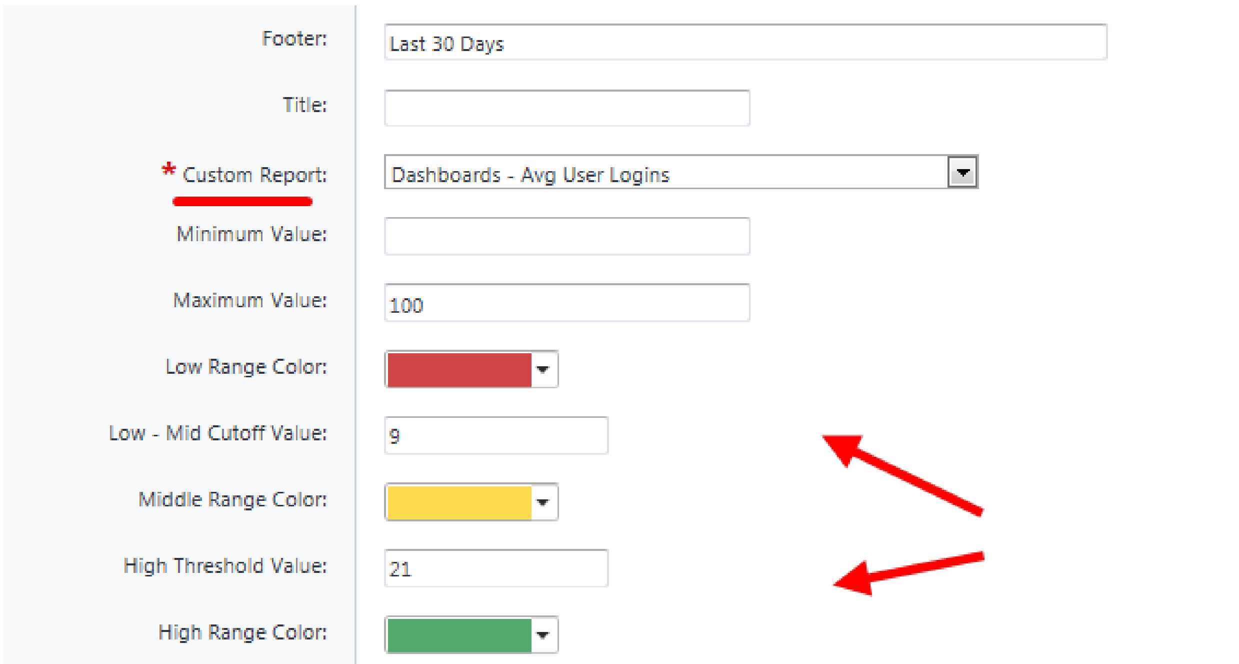


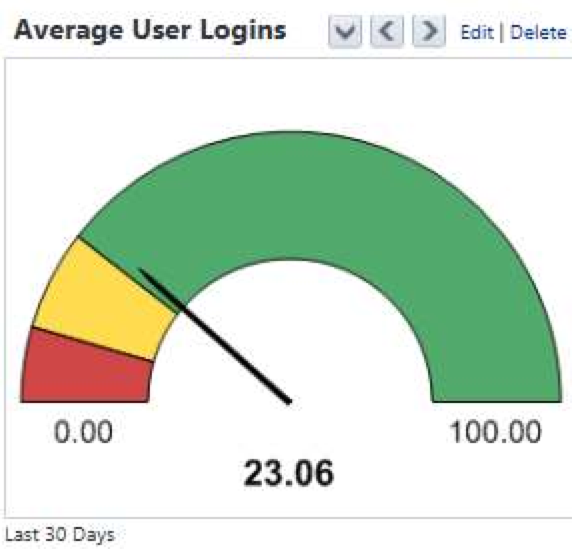
Total User Logins Edit | Delete

Last Name	Sum of Number of Logins
Owen	211.00
Valle	125.00
Whitmore	108.00
Eberly	60.00
Service	24.00
Procaccini	22.00
Kelley	10.00
Aranda	8.00
McCarthy	3.00
Dwyer	2.00
Nanninga	2.00
Fecteau	1.00
Godsey	1.00
Matovu	1.00
Admin	0.00

Last 30 Days

46. *For Gauge:*
   - *Select Report, Range Colors, and Cutoff Values*
   - *Click **Save***





Note: Dashboards are based on summary and matrix reports. The values are determined by groupings.