

Report Writing/Query Tool Training



HARD ROCK
CASINO & HOTELS

TULSA | MAR 30 – APR 02



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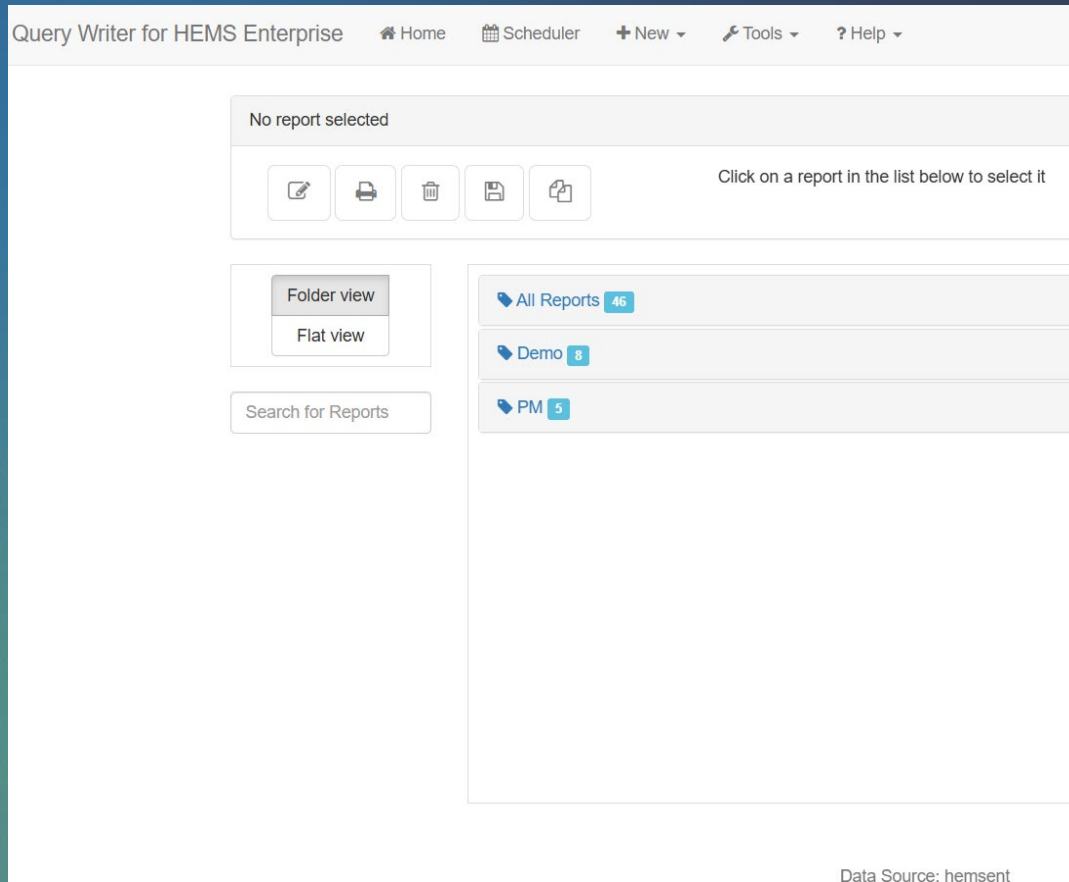
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What is Query Writer?



Custom Report Creation Tool

- Query Writer allows custom report creation
- No need to reach out to support to get data out of your system



Filter in ways that work for you

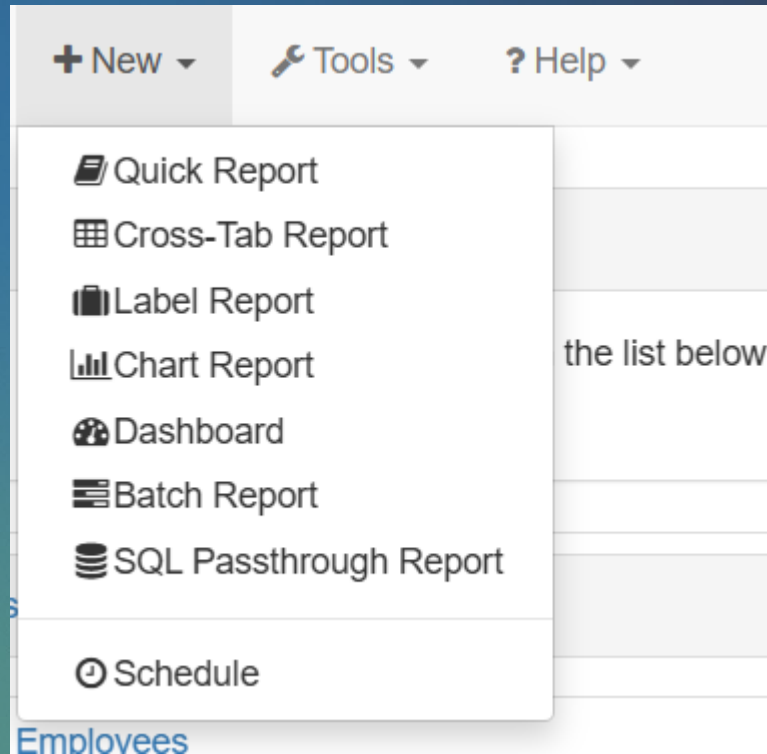
- Several filter options available
- Can manipulate the data to extract exactly what you need without extra information



Allows scheduling of reports

- Set it and forget it
- Reports no longer need to be manually run and emailed

Report Types



- **Quick Report** – A majority of reports will use this option. A simple report with fields and filters
- **Cross-Tab Report** – Similar to a pivot report in Excel
- **Label Report** – For creating printable labels
- **Chart Report** – A chart based report
- **Dashboard** – Dashboard report
- **Batch Report** – For combining several reports into one single report
- **SQL Passthrough Report** – Manually written SQL statements turned into a report format



Initial Settings

Name

Comments

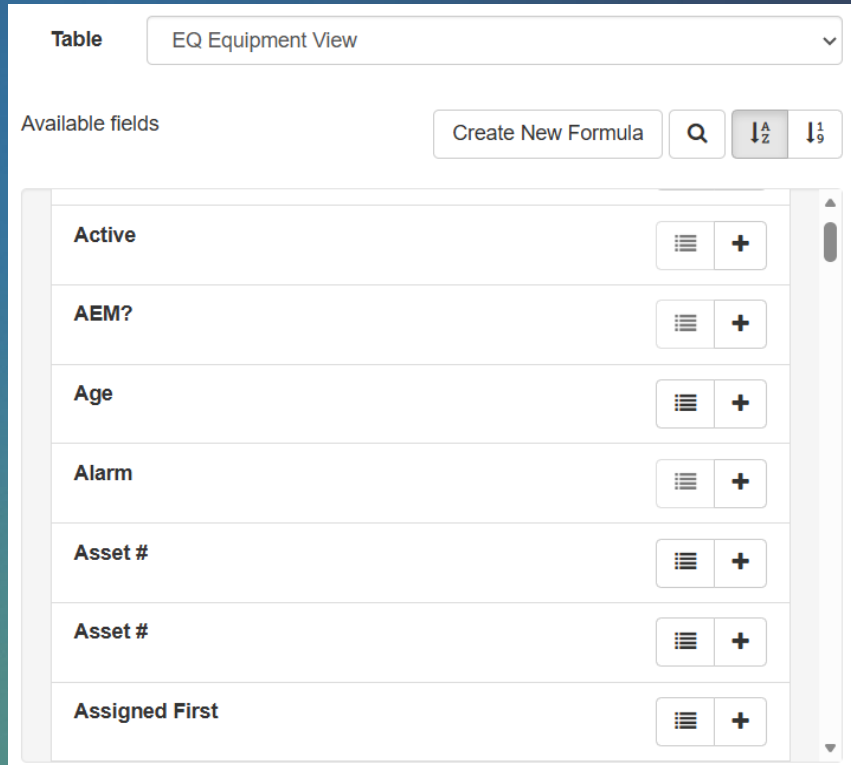
Tags

Data sources

- Give report name
- Comments are optional, they are for reference only and do not show up on the report
- Tags are used to keep reports organized. Start typing to select an already present tab.
- Create new tab by typing the name and tabbing out of the field
- Select relevant data source, most of the time this will be a singular option



Field Selection



- Choose table to get fields from
- Try to get all fields from a single table, using a combined view where possible
- Main tables used will be EQ Equipment View, WO Information, WO with Equipment Information, Wo with EQ and Labor Details
- To add field to report, click “+” icon
- Drag and drop fields to re-arrange
- Field Properties allows changing of header, format, and conditional formatting



Grouping

Normal fields

- Control #**
In group header
- EQ Class**
In group header
- EQ Purchase Cost**
In group header
- EQ Purchase Date**
In group header
- Manufacturer**
In group header
- Model #**
In group header

Grouped fields

Active

- EQ Type**

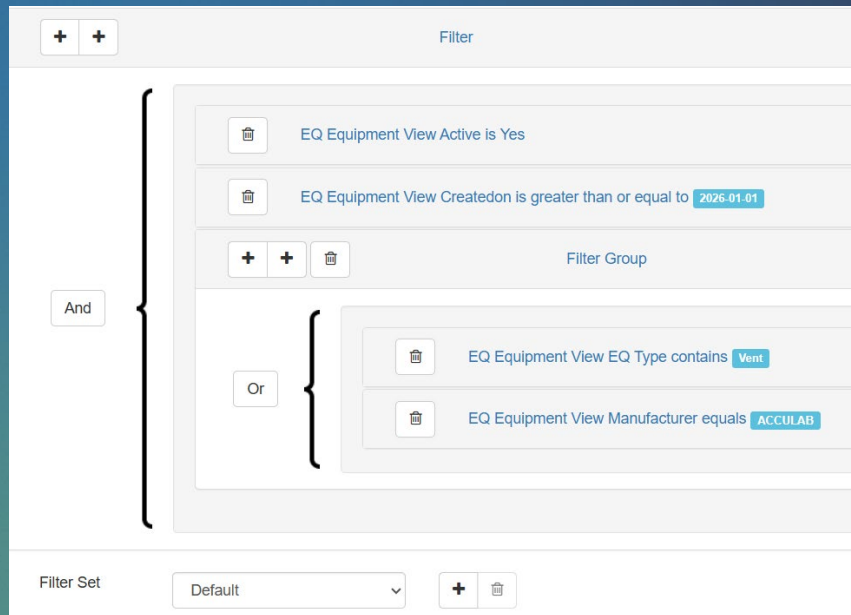
Active

- Include count in group footer**
- Group starts on**
Continue on same page
- Create bookmark on this field**
- Stack fields in group header**

- Allows fields to be grouped
- First field added to grouped fields is the main group, subsequent fields are sub groups within that first group
- Selecting the grouped field allows for changing the settings for the group
- Fields within the group can be sorted by any available field, and summarized by none, count, count distinct, highest, lowest

Filtering

- When creating filters, try to use the table that a majority of the fields in the report are from
- There are two types of filters available, single or filter group
- The single and filter groups can have either “and” or “or” connections
- To create “or” connections within the and conditions, create a filter group
- Various different operators are available depending on the field type selected, EX: Contains, Begins With, Between, Equals, Greater/Less Than or Equal To
- Filter sets are available, this allows one set of report fields with varying filter sets without requiring duplication of a report
- Filters can be created as ask at runtime. This will then prompt the user to enter the filter conditions every time a report is run. Scheduled reports will not be able to have any ask at runtime conditions
- Expressions can also be created for the conditions, this is especially useful for reports that are intended to be scheduled where the desired date range will change each month



Report Options

The screenshot displays the 'Advanced Report Properties' configuration window, divided into two main sections: 'Layout' and 'Data'.

Layout Section:

- Title:** Demo Report
- Orientation:** Automatic
- Template:** Professional - Blue
- Paper type:** Letter
- Left margin:** 1
- Right margin:** 1
- Top margin:** 1
- Bottom margin:** 1
- Localize:** (checked)

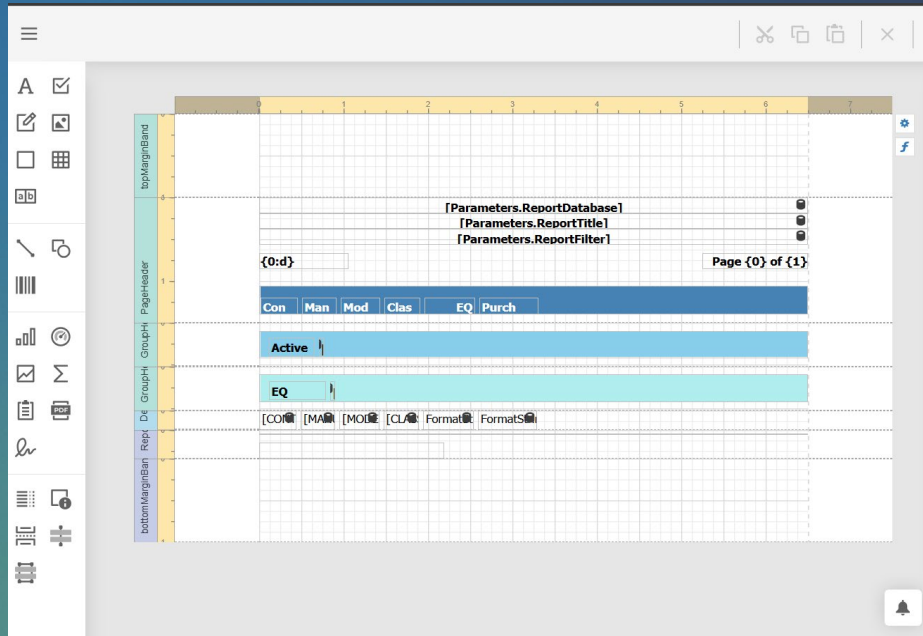
Data Section:

- Group totals:** After values
- Always run:** (checked)
- Summary report:** (checked)
- Distinct:** If filtering on a table not in the report
- Top N:** No, 0

- Allows for modifying the layout of the report
- Layout applies only to the PDF or Full Format exports
- Allows data settings, including Always run (important in scheduling) and making a report a summary report
- Allows setting distinct results



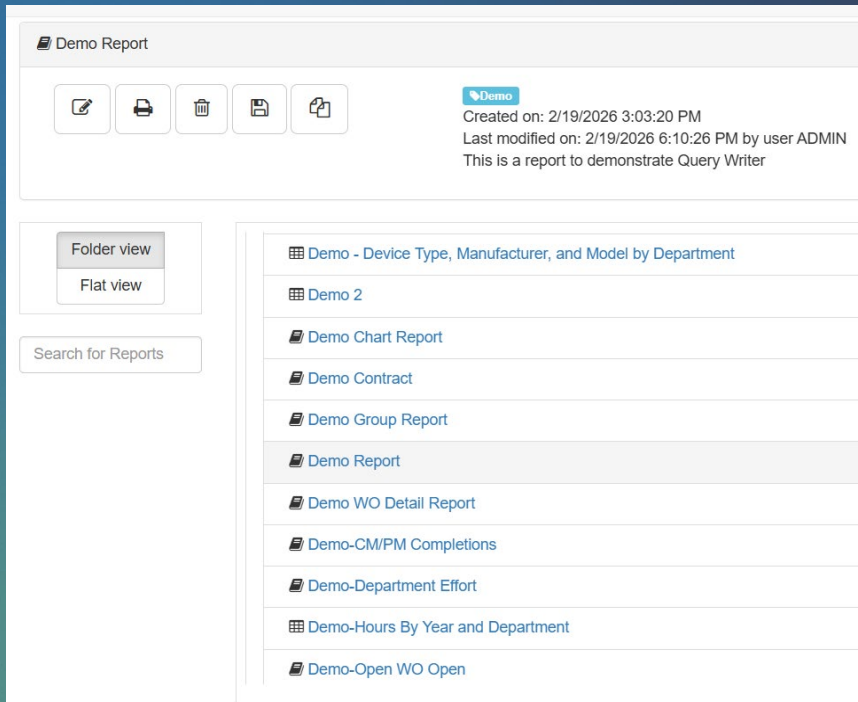
Advanced Reports



- Accessed by clicking the Edit Advanced Layout button on step 5, Report Options page
- Allows for further customization of layout of report
- Used to add Pivots (Cross Tab), Charts, Graphs, Gauges, Sub Reports, ETC. to a report
- Once an advanced report is utilized, any changes to fields or field orders will not be automatically reflected on the report, they must be manually added to the advanced layout



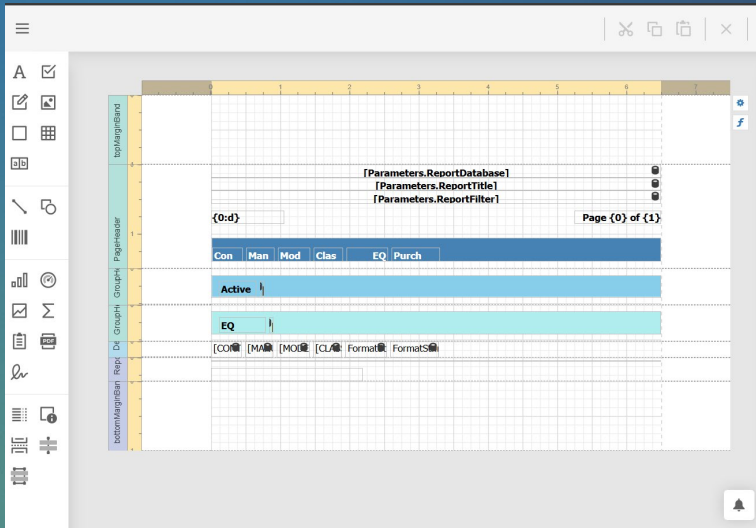
Running/Exporting



- Two ways to run a report:
 - **Preview:** Click on the report name and the report will run in a preview mode which will then allow you to export the report.
 - **Export:** Click in the box to the right of the report name, select the disk icon in the top menu. This allows direct exporting of a report without first previewing the report.
- Reports can be exported in various formats: PDF/XLSX Full Format (will export as you see in the preview screen), XLSX (raw data output without formatting), ETC.
- Exporting can either be downloaded, emailed, or uploaded to a FTP server by filling out the appropriate fields and clicking the desired export button
- Once your export settings are finalized, you can save these settings for future exports by clicking the Save Changes button



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Scheduling Reports

The screenshot shows a configuration form for scheduling reports. It includes the following fields and options:

- Name:** A text input field with the placeholder "Enter schedule name".
- Data Source:** A dropdown menu currently showing "hemsent".
- Combine email attachments:** A toggle switch that is currently turned on (indicated by a blue 'x' and a checkmark).
- Start:** A date and time selector showing "2026-02-20" and "12:00:00 pm".
- End:** A toggle switch that is currently turned on.
- Interval:** A dropdown menu set to "Daily".
- Weekdays Only:** A toggle switch that is currently turned on.
- Every:** A text input field containing "1" followed by "day(s)".
- Repeat:** A toggle switch that is currently turned on.

- Only reports without ask at runtime conditions can be scheduled
- A start and end date can be set. It is best practice to not have reports run at midnight
- Reports can be ran on the following intervals with varying options within those intervals: Daily, Weekly, Monthly, Day of Month
- Multiple reports can be set to the same schedule
- The same report can be sent with different filter sets if it has multiple sets available
- Reports can be set to upload to FTP and Emailed
- Groups can be sent as separate report files
- If you are utilizing groups, you can get the email address to send the report from an available field in the report

Q&A

Thank you

