Reports - User FAQs

Functionality

How do I create a report?

Multiple guides have been written to help users to understand the different components of creating a report.

Create a Report
Create a Report Chart

What data can I report on?

All data in the system is reportable as long as your Access Role states that you have permission to view it. This is controlled by the **Reports Access** option within the Access Role.

Can I create Calculated Columns?

Calculated Columns and Static Columns can be created to provide you with a method of inputting data into a report, where the product would not usually be able to do so. For more information on Calculated and Static Columns, view the articles below:

Create a Calculated Column

Create a Static Column

Can I use aggregate functions?

Yes. On any numeric field you add to your report you may additionally specify an aggregate function, for example Sum, Average, Maximum or Minimum. For more information on Aggregate Functions, view Aggregate Functions.

How do I restrict the data which returned?

Control the data which is returned in a report by using the comprehensive Filters section. For help on this, view the Report Criteria tab in Create a Report.

How do I run a report?

For guidance on how to run a report, viewRun a Report.

Can I export reports?

Yes, reports can be exported into a number of different formats so that they can be used by personnel in all areas of your organisation. View Export a Report.

Can I group my reports?

Yes. You can create a Report Category or "folder" and place your reports in that category so that

they are clearly organised. View [Create a Report Category](#).

Can I make temporary changes to a report?

Yes. By running the report to screen you can use the**Change Report** option to make a temporary change including adding an additional column or new filter.

How can I find the correct fields to report on?

As the reportable data can sometimes be vast, the search bar can be used to filter the list of reportable fields, allowing you to easily create your report columns without the need to browse through every field. The search bar is located within the Field Selector.

Is there a limit to the number of columns that I can add to a report?

No, there is no limit to the number of columns that you can add to a report, however, the more columns which are added will affect the page performance due to the amount of data being returned.

Can report columns be moved after being added to a report?

Yes. Click a column header and drag the column to its new position.

Can I change report criteria each time I run a report?

If any of the report criteria is set to 'I'll decide when I run the report', you will be able to specify the filter criteria at the point of running the report. The benefit of deciding the criteria when running the report is useful in loads of situations, some of which are described below:

- Employee List Report - Use the criteria at the point of running the report to filter which employees are under a specific line manager.

Permissions

Can I edit someone else's report?

No. You have to be the owner (creator) of the report in order to be able to make amendments or delete the report from the system. You can however save a copy of the report and then amend your own copy.

Can other people see my reports?

If you make your report category private, only you can see and use the reports that you have created. If you allow your report category to be global, other users with the correct permissions can run your report and view the results.

Who is entitled to create reports and what data can they see?

Permission to use the reports functionality, as well as the data that can be viewed, is granted within

a user's Access Role. In order to provide the reporting permissions to a user, you must activate the following:

- The **Reports** element with the user's Access Role.

- To determine which level of data the user can report on, set one of the following under the **Reports Access** option:

    - All Data
    - Data from employees they approve
    - Data from the following access roles (you can then select the appropriate Access Roles).

Other

Will reporting be included within Assure Expenses Mobile?

The current version of Assure Expenses Mobile does not provide the ability to use the reporting functionality, however, Assure Expenses Mobile statistics are reportable on the web version.

Will Reports work on all supported browsers?

Yes, Reports will work on all Internet browsers which are supported by RLDatix. ViewSupported Browser Versions.

Will this impact existing reports which have been created by our organisation?

No, if you already use the Reports feature, all of your existing reports will not be affected and can continue to be used as normal.

Will there be any standard reports?

Yes, the Reports feature includes a suite of standard reports which are already built and can be used immediately. Copies of these global standard reports can be made using the **Save As** feature, so amendments can be made which are tailored to your organisation's preferences.