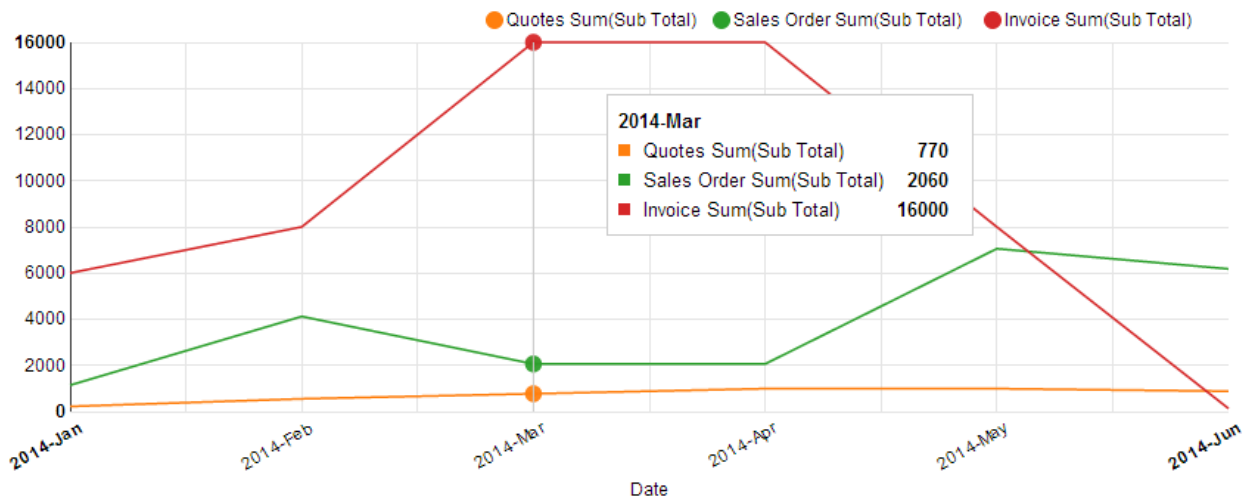


User Manual for Sapiens.BI Basic

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SAPIENS.BI FEATURE OVERVIEW

- Various pre-defined reports are available for most of CRM system modules containing different summary types and chart types
- You can modify any of the existing reports or you can copy an existing report in order to create new one
- You can
 - add/remove fields or columns to be displayed in a report
 - Select what should be summarized, counted or average value
 - Filter your report data to see a specific date range, statuses or any other option
 - Create detailed, summary and pivot(matrix) reports
 - Choose report grouping and summary options, incl. the grouping order
 - Identify what should be displayed as a row and what should be a column in your report
 - Identify the order for unlimited grouping and summary levels
 - Chart types: Pie, Line, Bar
 - Change chart types and set options what should be displayed on which axis
 - In the same report and chart you can summarize and compare data from various modules
- Charts are interactive: on mouse over or mouse click on the chart area a small tooltip will show you the name and amount of the corresponding area



- Reports can be exported to Excel or PDF
- Charts can be saved as pictures (.png format)
- Charts can be added to CRM system Homepage / Dashboard/Widgets
- For each report you can set permissions for individual users or user groups to allow to see or edit/delete the report;
- Regular Report auto-creation and emailing as a link and/or PDF/Excel attachment to selected users can be scheduled
- Reports are organized in folders. You can move reports between folders. You can edit/delete these folders and you can create your own new main folders or sub-folders.

PRE-DEFINED REPORT LIST AND FOLDERS

List of the folders with pre-defined reports will be the first thing you see after opening „Sapiens.BI” from the main menu. Reports are mainly organized according to CRM system modules, for example, in the „Invoices” folder, you will see summary and detailed reports related to Invoices, Quote related reports are found in the „Quotes” folder.

Open a folder by simply clicking its name or icon to see the reports inside. Close the folder by clicking it again.

Report folders Add folder	Description	Tools
<ul style="list-style-type: none"> Main Overall Reports Helpdesk and Tickets Leads Organizations Campaigns Products Opportunities Quotes Sales Orders Invoices Purchase Orders 	<p>Reports related to Helpdesk and Ticketing system</p> <p>Folder contains Lead Summary and Detailed Reports</p> <p>This folder contains Organization / Customer Summary and Detailed Reports</p> <p>Folder contains Reports related to Campaigns</p> <p>This folder contains Reports about Products</p> <p>Folder contains Opportunity related Reports</p> <p>Folder contains Quote Summary and Detailed Reports</p> <p>Quote Amounts by Products by Quote Stage</p> <p>Quotes by Employee by Month</p> <p>Quotes by Opportunity by Month</p> <p>Quotes by Organization Detailed Report</p> <p>Quotes by Organization Industry Summary</p> <p>Quotes by Organization Summary</p> <p>Quotes by Quote Stage by Month</p> <p>Quotes by User by Quote Stage</p> <p>List of Quotes with detailed quote information, grouped by customer (Organization)</p>	<p>Edit Add folder</p> <p>Edit Add folder</p> <p>Edit Add folder</p> <p>Edit Add folder</p> <p>Edit Add folder</p> <p>Edit Add folder</p> <p>Edit Add folder</p> <p>Delete</p> <p>Delete</p> <p>Delete</p> <p>Delete</p> <p>Delete</p> <p>Delete</p> <p>Delete</p> <p>Delete</p> <p>Edit Add folder</p> <p>Edit Add folder</p> <p>Edit Add folder</p>

In the folder list you can drag&drop reports to another folder but only if you have edit permissions to this Report. Click „Edit” on the right side of the folder if you want to change the Folder name and/or its Description. Clicking „Add folder” on the right side of the folder lets you add a sub-folder. To add a regular folder click “Add folder” in the top-left section:

Report folders Add folder	Description
<ul style="list-style-type: none"> Main Overall Reports Helpdesk and Tickets Leads 	<p>Reports related to Helpdesk and Ticketing system</p> <p>Folder contains Lead Summary and Detailed Reports</p>

Clicking „Delete” on the right side of the Report deletes the Report. This option is only available if you have the permissions to Delete the report. You can delete folders in the same way. However, only empty folders can be deleted. If there are any reports in the Folder, you will not be able to delete it.

Note: A folder might appear to be empty but in fact there might be reports which you don’t have permissions to see. In this case you will not be able to remove the folder.

New folders and reports are sorted in the order of their creation date&time (latest will appear at the end of the list). After they are saved you can easily rearrange their order by dragging & dropping them as you wish.

Open a report by clicking its name from the list.

To create a new report you should start from opening an existing report, which contains data of those modules that you need to see in your new report. Then click „Save as” and in the pop-up window enter the name, description and folder of your new report and after clicking „Save” the report will be created.



[Save](#) [Save As](#) [Delete](#) [Back to reports](#)

Products by Sales Order Status by Month

Or you can build a report from scratch by clicking to 'Report Builder' link on top of Report and Folder list.

[Add folder](#) [Mass schedule & permissions](#) [PRO](#) [Report Builder](#) Match all words

Report folders	Description
Accounts	This folder contains Account Summary and Detaile
Contacts	Summary and detailed Contact related reports
Opportunities	Folder contains Opportunity related Reports
Opportunities by User by Sales stage Summary	Pivot with Combined Chart, based on Opportunite
Opportunities by Users by Sales Stage Monthly Summary	Pivot, based on Opportunities module
Opportunities by Account Industry Detailed Report	Based on Accounts and Opportunities modules

REPORT AND CHART SETTINGS OVERVIEW

When you have your report open, in the upper part of your screen you will see the Report editor and Report data. In the lower part of the screen you will see the Chart editor and the Chart related to this report.

Products by Sales Order Status by Month

Report Editor

Include details (?)

Field	Sum	Average	Count	
(Sales Order) Sub Total	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Report

Status	Product Name	2014-Jan S...	2014-Feb S...	2014-Mar ...	2014-Apr ...	2014-May ...	2014-Jun S...
Delivered (1)						4,995.00	
Delivered	Pro XYZ					4,995.00	
Cancelled (2)					4,120.00	4,120.00	
Cancelled	Product C				2,060.00	2,060.00	
Cancelled	Vtiger Single User Pack				2,060.00	2,060.00	
Approved (4)		1,140.00	8,240.00	4,120.00			12,360.00
Approved	Product B	1,140.00	8,240.00	2,060.00			
Approved	Vtiger Single User Pack			2,060.00			
Approved	Cd-R CD Recordable						6,180.00
Approved	Product C						6,180.00
Grand Total		1,140.00	8,240.00	4,120.00	4,120.00	9,115.00	12,360.00

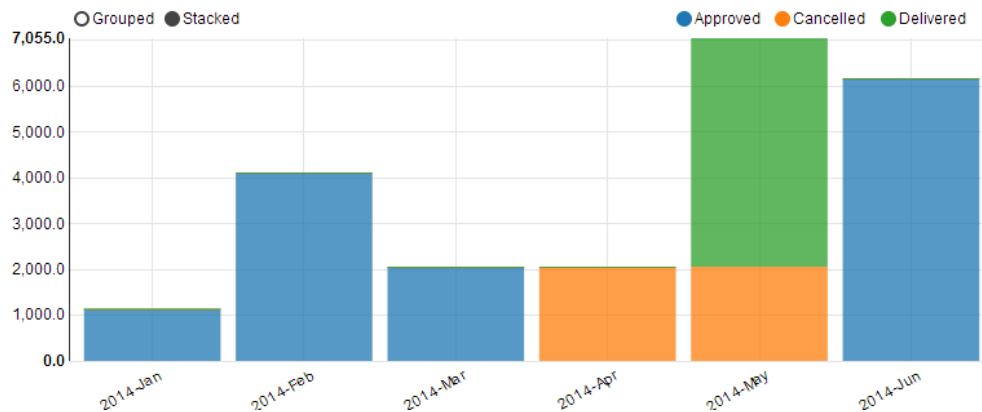
Export as .xlsx

Chart Editor

Type:

Title:

Chart



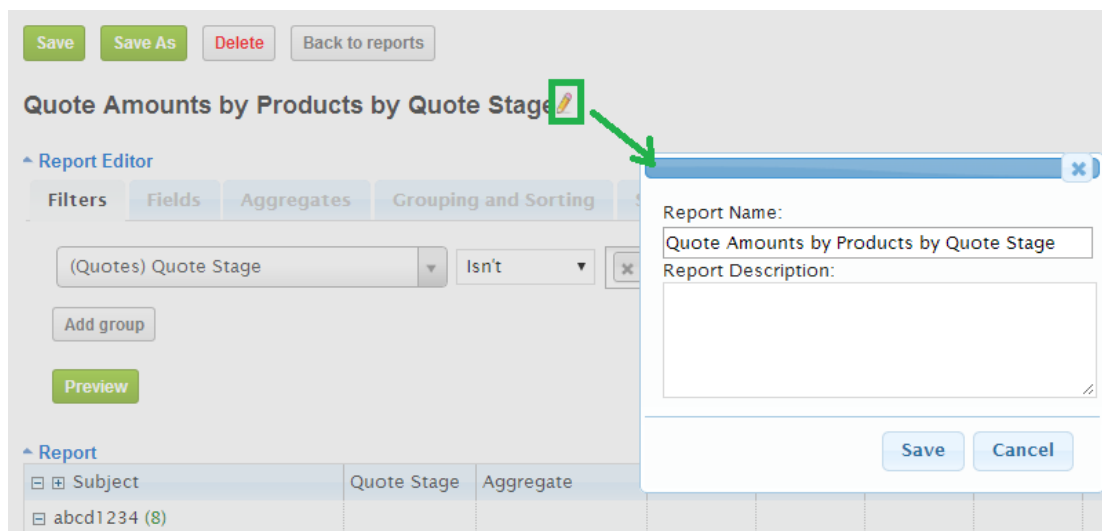
For any changes to take effect you need to click the „Save” button. The save button applies to both: Report and Chart settings.

The „Delete” button also applies to both: current report and chart. Confirming a deletion of a report removes it permanently.

Note: „Save”, „Save as” and „Preview” buttons are only visible if you have permissions to Edit this report. The „Delete” button is only visible if you have permissions to delete this report.


„Back to reports” will return to the Folder and Report list, without saving any changes made to the report (unless you have saved those changes already).

On the next line is the Report Name. Clicking the pencil icon (to the right of the report name) you can change the name and description of this report.



Bellow the Report Name you can see the four main parts of your report:

1. Report Editor – here you can edit the Report settings
2. Report - shows report data according to its settings
3. Chart Editor – for Chart Settings
4. Chart – shows your chart according to report and chart settings

Each of these sections can be closed or opened with the small arrow next to the section name:  Report Editor

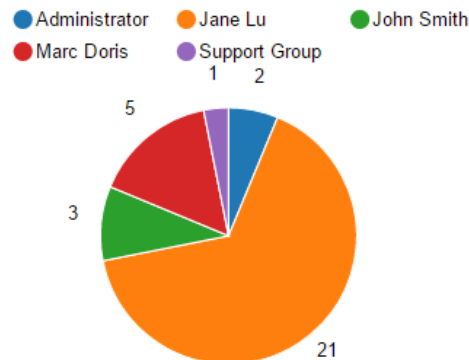
This way you can hide some parts. For example, you can keep the report settings always closed and open them only when you need to make changes. The small triangle next to the section title identifies its state, whether it is open or closed. In the example below only the “Chart” section is open, all others i.e. Report Editor, Report, Chart Editor are closed:

Save Save As Delete Back to reports

Organizations by Assigned User - Detailed

- Report Editor
- Report
- Chart Editor
- Chart

Organizations by Assigned user



After clicking "Save" the report will remember the section states for when it is opened the next time.

When changing settings in the Report Editor, click „Preview" to see the report data according to the new settings. It is important to remember to Save (or „Save as"), if the Preview gives satisfactory results and you would like to keep the new settings ;).

After changing the report settings, you need to change the chart settings properly, and then click on the Chart „Preview" button. Modified Chart settings should be saved as well.

Blue colored text inside of your report means that you can open it. For example (picture bellow), clicking on the Organization Name „EDFG Group Limited" will open that Organization's Detail View to see all its data. Clicking the Contact Name „Margaret" will open Margaret's Contact Information detailed view. Clicking „t3M Invest A/S – 1000 units" will open the corresponding Opportunity.

Report

Organization Name	Quote No	Sub Total	Subject	Opportunity Name	Quote Stage	Valid Till	Contact Name	Total	
EDFG Group Limited	400	44000							
EDFG Group Limited	QUO10	11000	Prod_Quote	samplevtiger - 1000 units	Accepted	08-Apr-2014	Margaret	16000	Ja
EDFG Group Limited	QUO1	11000	Prod_Quote	samplevtiger - 1000 units	Accepted	03-Feb-2014	Margaret	16000	Ja
EDFG Group Limited	QUO11	11000	Prod_Quote	samplevtiger - 1000 units	Accepted	20-May-2014	Margaret	16000	Ja
EDFG Group Limited	QUO9	11000	Prod_Quote	samplevtiger - 1000 units	Accepted	05-Mar-2014	Margaret	16000	Ja
Good4you Inc. (15)	1500	330000							
ROCUS Ltd. (2)	200	44000							
ROCUS Ltd.	QUO3	22000	SO_Quote	t3M Invest A/S - 1000 units	Accepted	20-May-2014	Jennifer	27000	Jc
ROCUS Ltd.	QUO8	22000	SO_Quote	t3M Invest A/S - 1000 units	Accepted	20-May-2014	Jennifer	27000	M

If you have grouped items selected under the "Grouping & Sorting" tab for a detailed report or you have some additional grouping levels, then you can select to expand or collapse each group in the report table by clicking "+" or "-" next to it. Selected expanded or closed state will be remembered if this is common for all items within a group. In the example below we have expanded all of the customer names and collapsed all of the Statuses, these settings will be saved by clicking the "Save" button at the top of this report.

^ Report

Page No: **1** 2 3 4 Show 50 records per page Freeze first 2 columns

Name:	Status:	Subject:	Start Date:
Start Over Trust (9)		9.00	03-10-2015 15:45:00
	Held (3)	3.00	09-05-2016 15:45:00
	Not Held (1)	1.00	13-04-2016 13:00:00
	Planned (5)	5.00	03-10-2015 15:45:00
SuperG Tech (8)		8.00	04-02-2016 16:15:00
	Held (5)	5.00	04-02-2016 16:15:00
	Planned (3)	3.00	18-11-2015 16:00:00
Tracker Com LP (7)		7.00	02-11-2015 10:45:00
	Held (2)	2.00	08-02-2016 19:45:00
	Not Held (3)	3.00	02-11-2015 10:45:00
	Planned (2)	2.00	13-10-2015 11:45:00
T-Cat Media Group ...		6.00	01-11-2015 12:00:00
	Held (3)	3.00	01-11-2015 12:00:00
	Not Held (3)	3.00	04-03-2016 07:00:00
White Cross Co (5)		5.00	03-05-2016 13:00:00
	Held (3)	3.00	08-12-2015 10:15:00
	Not Held (1)	1.00	30-01-2016 09:45:00

Numeric values in your report data will be formatted according to your CRM system user settings. To change those, you need to go to your User Preferences – in CRM system top right corner, then set your preferred Decimal Separator and Digit Grouping Separator.

By default, all dates in the report tables will be displayed in the ‘yyyy-mmm-dd’ format, for example: “2016-Jan-01”.

Click the “Save” button after the necessary format is selected. From the sample above, this will give you the following outcome:

^ Report

Page No: **1** 2 3 Show 20 records per page Freeze first 2 columns

Assigned User:	Rating:	Name:	Date Created:	Industry:
Chris Olliver (6)		6.00		
	(6)	6.00		
Chris Olliver		Underwater Mining Inc.	12-08-2015 11:51:43	Chemicals
Chris Olliver		Waverly Trading House	12-08-2015 11:51:43	Consulting
Chris Olliver		Cloud Cover Trust	12-08-2015 11:51:43	Education
Chris Olliver		Overhead & Underfoot Ltd.	12-08-2015 11:51:43	Engineering
Chris Olliver		Rhyme & Reason Inc	12-08-2015 11:51:43	Government
Chris Olliver		Ink Conglomerate Inc	12-08-2015 11:51:43	Technology

You can change the width of columns by dragging the edges of its header. After saving the report the column sizes will be remembered.

^ Report

Page No: 1 2 3 4 Show records per page Freeze first

Name:	Status:	Subject:	Start Date:
Start Over Trust (9)		9.00	03-10-2015 15:45:00
	Held (3)	3.00	09-05-2016 15:45:00
	Not Held (1)	1.00	13-04-2016 13:00:00
	Planned (5)	5.00	03-10-2015 15:45:00

Print Report, Export to Excel/ PDF

To print the Report, click the link „Print Report” (or „Print Report with Chart” if you would like to print the Chart as well) at the bottom of your report. This will open Print Preview and Printing options.

To export the Report Data to Excel, click the link, „Export as .xlsx” at the bottom of your report:

Organizations by Assigned User by Rating Summary

^ Report Editor

Filters Fields Aggregates Grouping & Sorting Sharing & Scheduling

(Organizations) Rating Isn't Project Cancelled

Add group

Preview

^ Report

Assigned To	Active Count(Organization Numb...	Acquired Count(Organization Num...
Jane Lu	4	1
John Smith	3	
Marc Doris	3	2
Grand...	10.00	5.00

Print report | Print report with chart | Export as .xlsx | Export as PDF

Note: Older Excel versions than .xlsx might have problems with export. To solve them, upgrade the Ms Office plug-in or upgrade the Ms Office version.

„Export as PDF” will export your report in PDF format.

To save your chart as a Picture (.png format), click on the gear icon and then „Save Chart as Picture” link option:

Rep (last 60 days)

Jim Brennan Max Jensen Sally Bronsen Sarah Smith Will Westin

Max Jensen: 55

Jim Brennan: 70

Chris Olliver: 44

468



Max Jensen Sally Bronsen Sarah Smith Will Westin

Jim Brennan: 70

Chris Olliver: 44

468

- Hide legend
- Save Chart as Picture
- Add To Homepage

Note: Please check your Browser - older Web browsers (Chrome, Firefox or Internet Explorer) might have issues with Saving charts as pictures.

FILTERING REPORT DATA - „REPORT FILTERS” TAB

You can limit the data in your report by adding filter options. This can be done under the „Filters” tab. Selected filters will apply to both: the Report data and Chart. Filters can also be used for Search purposes.

In the pre-defined reports you can see what filters have already been applied. You can add/remove or edit the existing filters.

1. First you need to select the column (field) on which the filter will be applied. Start typing the field name and the drop-down menu will quickly narrow down the available fields.

Quote Amounts by Products by Quote Stage

Report Editor

Filters Fields Aggregates Grouping and Sorting Sharing access

(Quotes) Valid Till Between [] [] ✖

Quot +

Quote Information

- (Quotes) Quote No
- (Quotes) Subject
- (Quotes) Opportunity Name
- (Quotes) Quote Stage
- (Quotes) Valid Till
- (Quotes) Contact Name

Aggregate	2014-Jan	2014-Feb	2014-Mar	2014-Apr	2014-May
Sum(Qty)		100		200	
Sum(Net Price)		13000		26000	
Sum(Qty)			100		100
Sum(Net Price)			13000		13000
Created					
Delivered	100		100		

- Select the operator for the criteria, for example, „Is” if you need to get a match with your specified criteria, „Isn’t” if you want to set criteria to be dismissed from the report. In our example we want to filter only those Quotes, which have Valid dates between June 1st, 2014 and June 30th, 2014. We choose the „Between” operator.
- We then set the criteria. In our example since we chose the „Between” operator, we can now set the start date and end date:

Report Editor

Filters Fields Aggregates Grouping and Sorting Sharing access

(Quotes) Valid Till Between 2014-06-01 2014-06-30 ✖

Add group

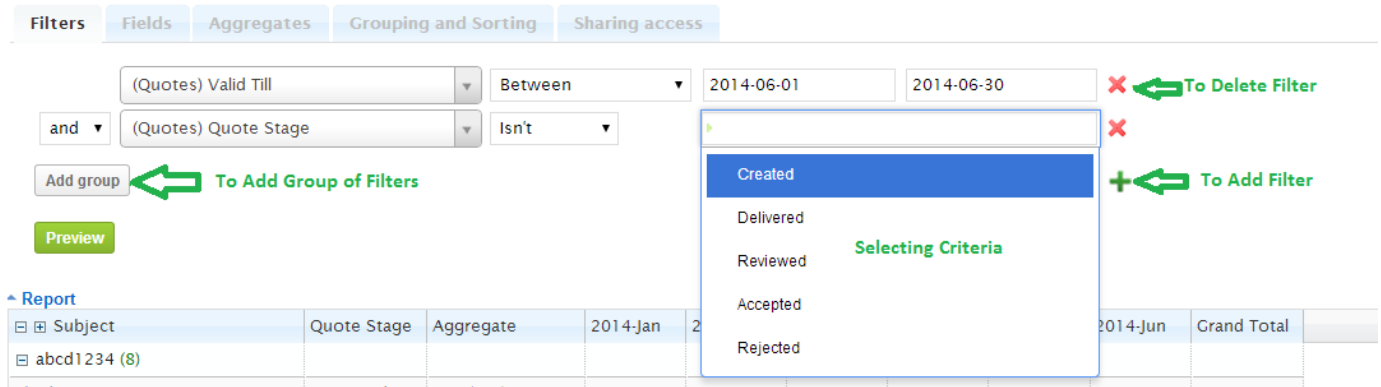
Preview

Report

Subject	Quote Stage	Aggregate	2014-Jan	2014-Feb	2014-Mar	2014-Apr	2014-May	2014-Jun
abcd1234 (8)								
abcd1234	Accepted	Sum(Qty)		100			200	

- If we want to add one more criteria and, for example, we want to filter out rejected quotes. First we add a second filter by clicking the green „+”. Choose „Quote Stage” as the column to be filtered. Select „Isn’t” as the operator. We are now given a drop-down selection of all the “Quote Stage” values:

Report Editor



If both filter conditions must strictly match our criteria at the same time for each Quote, we set „And” between both filter rows. This is the case in our example. If either one or the other filter can be a match select “or”.

You can have groups of Filter conditions as well (this is needed, if there are complex combinations of “and”/”or” filter connectors). In such cases you should click the „Add group” button and then set another group of filter conditions.

Remove filters with the red „X”.

Please remember to save the Filter changes. If you are not sure, that you want to Save your changed filters, you can „Preview” the report and then close the report without saving if you do not wish to save the changes. You can also „Save as” to keep the current report without changes and play with the new report at the same time.

Additional pre-defined date and datetime filters for report viewing and for regular e-mail scheduling:

- # of Next days (for example, next 25 days or next 60 days from report viewing/auto-sending date);
- # of Passed days (for example, last 25 days or last 60 days till report viewing/auto-sending date);
- # of Greater than days (for example, 5 days will filter data where the date is 5 days or more in the future from the viewing/auto-sending date)
- # of Less than days (for example, 5 days will filter data where the date is 5 days or more in the past from the viewing/auto-sending date)
- You can also use date filters for: this week, last week, this month, last month, this year, last year.

Filters Fields Aggregates Grouping & Sorting Sharing & Scheduling

(Organizations) Created Time Isn't

Add group

Preview

Report

Assigned To	Active Count(Organiza	Count(Organization Num...
Jane Lu	4	
John Smith	3	
Marc Doris	3	
Grand To...	10.00	

Print report | Print report with chart | Ex

Chart Editor

Isn't empty
Is before
Is after
Between
Not between
Today
Tomorrow
Tomorrow onwards
Yesterday
Until yesterday
Next days
Passed days
Greater than days
Less than days
This week
Last week
This month
Last month
This year
Last year

All filters are runtime for e-mail scheduling, except the 'Current user' filter will not be taken in account when the report is sent via e-mail in PDF and Excel format. Only the link to the report will work with the 'Current User' filter.

With the "Current user" filter you can limit the User access to the data. If such filter is set, each user will see only their assigned entries.

Report Editor

Filters Fields Calculated fields Aggregate Grouping & Sorting

(Opportunities) Assigned User: Current user ✖

It is also possible to filter by the assigned main team or all teams assigned to the object. 'Team Id' will identify only the main assigned team. 'Team Set ID' identifies all assigned teams, not only the main team. If you need a User to see only their assigned team data, please use 'Current user' criteria as you can see below.

Filters Fields Calculated fields Aggregate Gr

(Leads) Team Id

team

Leads

- (Leads) Team Id
- (Leads) Team Set ID

Current user ✖

+

SELECTING COLUMNS FOR YOUR REPORT – „FIELDS” TAB

Under the „Fields” tab you can select fields to be shown, grouped or summarized in your Report and Chart:

1. Simply click on the field in the left-side selection box to highlight it (you can scroll down to find the field or you can type any part of the field title and also the module name to search)
2. Click on the green arrow to move the highlighted field from left to right side box
3. All fields, which appear in the right-side box, are selected for your report
4. If you have selected „Include details” check-box, then you will see all field data in your report. The column order in a detailed report will be organized same way as the fields in the right-side box. Highlight a field and then use the up/down arrows to change the field order.

You can remove a field from your report by highlighting it and then clicking the red „X” to remove it.

Quote Amounts by Products by Quote Stage

Report Editor

Filters Fields **Aggregates** Grouping and Sorting Sharing access

Include details (?)

1. Select fields for your report

Organiz| can type any part of the word to search

- Organization Information
- (Organizations) Organization Name
- (Organizations) Organization No
- (Organizations) Phone
- (Organizations) Website
- (Organizations) Fax
- (Organizations) Ticker Symbol

2. click →

3. here are your selected columns for report in Detailed Report they will be the same order as Field order in this box:

Selected columns for your Report:

- (Quotes) Quote Stage
- (Quotes) Valid Till
- (Quotes) Currency
- (Products) Unit Price
- (Products) Commission Rate
- (Products) Product Name
- (Inventory) Net Price

4. Use these arrows ↑ ↓ to change the field order

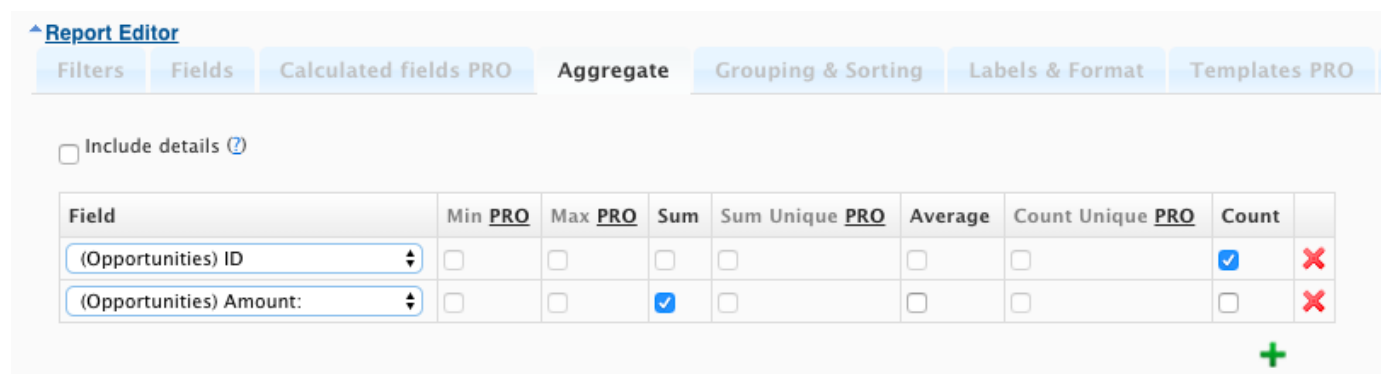
5. If you only need to see the summary data in your report keep „Include details” unchecked. Only those fields which are selected under the „Aggregates” and „Grouping and Sorting” tabs will be shown. The column order will depend on the selected grouping and sorting order as set in the „Grouping and Sorting” tab.

In both of the selection boxes you can highlight multiple fields by holding down the „Ctrl” key while clicking the fields.

Remember to save the selected Field changes. If you are not sure, that you want to Save the modified Field selection, you can „Preview” the changes and then close the report without saving if you do not wish to save the changes. You can also use „Save as” to keep the current report without changes and play with the new report at the same time.

SET COLUMNS TO SUM, AVG OR COUNT – „AGGREGATES” TAB

Under the „Aggregates” tab you can select which fields you would like to Count, Summarize, or find Average value. Simply select the field from the drop-down menu and then mark the check-box next to the selected field. Click the green „+” to add additional fields for aggregating. Remove fields with the red „X”.



The screenshot shows the 'Report Editor' interface with the 'Aggregate' tab selected. Below the navigation tabs, there is a checkbox for 'Include details'. A table lists aggregation options for two fields: '(Opportunities) ID' and '(Opportunities) Amount:'. The table has columns for Min, Max, Sum, Sum Unique, Average, Count Unique, and Count. The 'Count' column has checkboxes and red 'X' marks indicating which options are available for each field.

Field	Min PRO	Max PRO	Sum	Sum Unique PRO	Average	Count Unique PRO	Count	
(Opportunities) ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	✗
(Opportunities) Amount:	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	✗

+

For each selected field at least one of the summary options must be selected: Sum, Average or Count. All of the options can be selected but it is recommended to use only Sum or Average for amount and currency fields, while ID or Number should be used for count (or any unique field is highly recommended for correct count).

As always, it is necessary to select at least one “Group by” item under “Grouping & Sorting”.

Include details check-box is there to select detailed or summary report type. For more information about „Include details” please see the previous section „SELECTING COLUMNS FOR YOUR REPORT – „FIELDS” TAB” tab description, point 4 and 5.

Remember to save the selected Summary option changes. If you are not sure, whether you want to Save the changed Summary settings, you can click „Preview” and then close the report without saving. You can also use the „Save as” option, - to keep the current report without changes and play with the new report at the same time.

„GROUPING & SORTING” TAB

After you have selected the necessary Columns(fields) and summaries in your Report, you can identify how data should be grouped and sorted – under the „Grouping and Sorting” tab.

In the Grouping & sorting upper table in „Group by” select the field from the drop-down menu by which the data should be grouped and summarized in our Report. The drop-down menu contains only those fields which are selected under „Fields” tab. You can have several grouping levels in your report. The order of selected fields is replicated in your report. The first selected group (in the first row) is the upper level of the grouping and summarizing in your report, the „Level” number is „1”. The next summary you add (Level „2”) will be summarized already inside the 1st group. For example, if we want to see in our report Invoice amounts by Date and then by Product, we select date first and Product name second (please see the picture below). If you need to have this field grouped for summary, it is important to choose „Group” or „Group and sort” in the „Action” pick-list.

„Group and sort” and „Sort” options will allow you to identify the sort order in the „Sort” column: „Ascending” or „Descending”. If your report has selected Aggregates for summaries (under „Aggregates” tab), for the „Group and sort” option you can also choose to sort by this summary aggregate, for example, if you would like to sort not by Product name, but by product sold amounts.

For detailed reports (if „Include details” is checked) you can also select only to „sort” by this column. For more information about „Include details” please see the previous „Aggregates” tab section, point 4 and 5.

For date and date-time fields we can identify one of the following grouping levels: Day, Week, Month, Quarter, Year. In our example below we have selected to group and sort by Month of the Invoice date. In „Sort” selection you can identify the sort order (Ascending/ Descending) and also – do you want to sort by the group (in Alphabetic order) or by Sums in this group. For example, if you want to see the the month with the largest income from invoices first, you need to select Sum(Net Price)+Descending in sort options. In our example we want this to be sorted in calendar order, not by amounts, so we select the Invoice Date Ascending.

Filters Fields Aggregates **Grouping & Sorting** Sharing & Scheduling

Include details (?) Is Crosstab (?)

Level	Action	Group by	Sort
1	Group & Sort ▼	(Invoice) Invoice Date ▼ Month ▼	Invoice Date ▼ Ascending ▼ ✖
2	Group & Sort ▼	(Products) Product Name ▼	Product Name ▼ Ascending ▼ ✖

+

Select summaries to show in this report:

Group	Sum(Net Price)	Sum(Qty)
(Invoice) Invoice Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
(Products) Product Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Grand Total	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

[Preview](#)

Report

Invoice Date	Product Name	Sum(Net Price)	Sum(Qty)
2014-Jan (1)		2,200.00	1.00
2014-Jan	Product B	2,200.00	1.00
2014-Mar...		8,600.00	2.00
2014-Mar	Product B	8,600.00	2.00
2014-Apr...		15,597.00	6.00
2014-Apr	Brother Ink Jet Cartridge	1,908.00	2.00
2014-Apr	Cd-R CD Recordable	789.00	1.00
2014-Apr	Product B	8,600.00	2.00
2014-Apr	Product C	4,300.00	1.00

The green „+” adds one more grouping level and the red „x” removes it.

After the Grouping and Sorting options is the „Select summaries to show in this report:” table to select where we want our summaries to be shown/hidden. In our case we have selected to show selected summaries for all our groups and to display the Grand total as well:

Select summaries to show in this report:

Group	Sum(Net Price)	Sum(Qty)
(Invoice) Invoice Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
(Products) Product Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Grand Total	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

When our grouping options are set, we can click „Preview” button to see the result:

Report

Invoice Date	Product Name	Sum(Net Price)	Sum(Qty)
2014-Jan (1)		2,200.00	1.00
2014-Jan	Product B	2,200.00	1.00
2014-Mar (1)		8,600.00	2.00
2014-Mar	Product B	8,600.00	2.00
2014-Apr (4)		15,597.00	6.00
2014-Apr	Brother Ink Jet Cartridge	1,908.00	2.00
2014-Apr	Cd-R CD Recordable	789.00	1.00
2014-Apr	Product B	8,600.00	2.00
2014-Apr	Product C	4,300.00	1.00

If you want to see the group items each as a new column (instead of row), you should select the check-box for „Pivot (Matrix)“. As soon as „Pivot (Matrix)“ check-box is selected, we see additional options in our Grouping and sorting table: „Position“. Here we need to select at least one group item that should be organized as a „Column“. In our case it is Invoice Date, while Product name will be as „Row“.

In our example, we want to see each month in a new column. We select the „Pivot (Matrix)“ check-box, set „Column“ next to Invoice Date and click „Preview“. Now our report looks different:



Include details Pivot (Matrix) Aggregates as column Empty values as 0

Level	Action	Group by	Sort	Position
1	Group & Sort	(Invoice) Invoice Date Month	Invoice Date Ascending	Column
2	Group & Sort	(Products) Product Name	Product Name Ascending	Row

Select summaries to show in this report:

Group	Sum(Net Price)	Sum(Qty)
(Invoice) Invoice Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
(Products) Product Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Grand Total	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Preview

Product Name	2014-Jan Sum(Net Price)	2014-Jan Sum(Qty)	2014-Mar Sum(Net Price)	2014-Mar Sum(Qty)	2014-Apr Sum(Net Price)	2014-Apr Sum(Qty)	2014-May Sum(Net Price)	2014-May Sum(Qty)
Brother Ink Jet Cartridge					1,908.00	2.00		
Cd-R CD Recordable					789.00	1.00		
Product A							4,300.00	1.00
Product B	2,200.00	1.00	8,600.00	2.00	8,600.00	2.00		
Product C					4,300.00	1.00	4,300.00	1.00
Grand Total	2,204.00	5.00	8,604.00	6.00	15,598.00	7.00	8,603.00	5.00

However, since we have two aggregates: Sum of Net Price and Sum of Quantity, each column for each month is shown twice (additional column per aggregate within each month) and our report looks unnecessarily large. To solve this, we can select „Aggregates as column“ and we get:

Filters Fields **Calculated fields** Aggregate Grouping & Sorting Rename Labels Sharing & Scheduling

Include details (?) Pivot (Matrix) (?) Aggregates as column Empty values as 0

Level	Action	Group by	Sort	Position
1	Group & Sort ▼	(Invoice) Invoice Date ▼ Month ▼	Invoice Date ▼ Ascending ▼	Column ▼ ✖
2	Group & Sort ▼	(Products) Product Name ▼	Product Name ▼ Ascending ▼	Row ▼ ✖

Select summaries to show in this report

Group	Sum(Net Price)	Sum(Qty)
(Invoice) Invoice Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
(Products) Product Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Grand Total	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Preview

Report

Product Name	Aggregate	2014-Jan	2014-Mar	2014-Apr	2014-May	2014-Jun	Grand Total
Brother Ink Jet Cartridge	Sum(Net Price)			1,908.00			1,908.00
Brother Ink Jet Cartridge	Sum(Qty)			2.00			2.00
Cd-R CD Recordable	Sum(Net Price)			789.00			789.00
Cd-R CD Recordable	Sum(Qty)			1.00			1.00
Product A	Sum(Net Price)				4,300.00	699.00	4,999.00
Product A	Sum(Qty)				1.00	1.00	2.00
Product B	Sum(Net Price)	2,200.00	8,600.00	8,600.00			19,400.00
Product B	Sum(Qty)	1.00	2.00	2.00			5.00
Product C	Sum(Net Price)			4,300.00	4,300.00		8,600.00
Product C	Sum(Qty)			1.00	1.00		2.00

Each month now has only one column, but Sum of Net Price and Sum of Quantity are organized as rows in our report.

Sometimes it is necessary to see detailed data together with summary pivot view in the same report. For example, if you need to see Account details, Name, created date, Industry in each row and then summary by Opportunity Stage as a matrix, then just select "Pivot (Matrix)" checkbox again, and for detailed entries identify as "sort" and "row" – please see the sample below:

Include details Pivot (Matrix) Aggregates as column Empty values as 0

Level	Action	Group by	Sort	Position	
1	Group & Sort	(Opportunities) Sales Stage	Sales Stage Ascending	Column	✗
2	Sort	(Accounts) Name:	Name: Ascending	Row	✗
3	Sort	(Accounts) Industry:	Industry: Ascending	Row	✗
4	Sort	(Accounts) Date Created: Day	Date Created: Ascending	Row	✗



Report

Name:	Industry:	Date Created: (Day)	Closed Lo...	Closed Won...	Id. Decision ...	Needs Analysis ...	Negotiation/Revi..
194 Cochrane CORPORATION	Environmental	23-03-2016	1.00				
194 Cureton NATIONAL	Transportation	23-03-2016	1.00				
194 Darst Corp		23-03-2016	1.00				
194 Depue 1654		23-03-2016	1.00				
194 Diedrich Corp	Energy	23-03-2016	1.00				
194 Goodspeed LLC	Consulting	23-03-2016	1.00				
194 Grow FUNDS	Government	23-03-2016	1.00				
194 Gurganus 1654	Apparel	23-03-2016	1.00				
194 Hague 123	Media	23-03-2016	1.00				
194 Hulett Sugar	Engineering	23-03-2016	1.00				
194 Jules CORPORATION	Education	23-03-2016	1.00				
194 Kehl LLC	Machinery	23-03-2016	1.00				
194 Mackin inc	Hospitality	23-03-2016	1.00				

Please note that „Pivot (Matrix)” is not available if you have selected „Include details”.

Remember to save the selected Grouping and Sorting changes. If you are not sure, if you want to Save the changed Grouping and sorting settings, you can preview and close the report without saving. You can also use the „Save as” option to keep the current report without changes and play with the new report at the same time.

Note: If you are using the Leads module, it might be interesting for you to compare unconverted leads versus converted leads. In order to do that, you can select field „Converted” and then Group by this field.

REPORT HEADER AND LABEL RENAMING - RENAME LABELS TAB

If you want to change your report column / row titles or labels as well as chart labels click the „Rename Labels” tab. Here in the left column you can see the original report labels and on the right side you can edit and enter new labels which you would like to show in your report. Please see the example below.

Please note that you can edit the Report Title not under „Rename Labels” tab but with the pencil icon next to the Report Title. You can edit the Chart Title simply by clicking the Chart Title inside the Chart Title box.

Leads by Status - Summary To change Report Title To change report column/row and chart headers

^ Report Editor

Original Report Label	New Report Label Enter new title here:
First Name	<input type="text" value="First Name"/>
Primary Phone	<input type="text" value="Primary Phone"/>
Last Name	<input type="text" value="Last Name"/>
Company	<input type="text" value="Company"/>
Fax	<input type="text" value="Fax"/>
State	<input type="text" value="State"/>
Count(Lead Status)	<input type="text" value="# Leads"/>
Grand Total	<input type="text" value="Total"/>

^ Report

Lead Status	# Leads
Attempted to Con...	2
Cold	1
Contacted	5
Hot	6
Qualified	2
Warm	2
Total	18,00

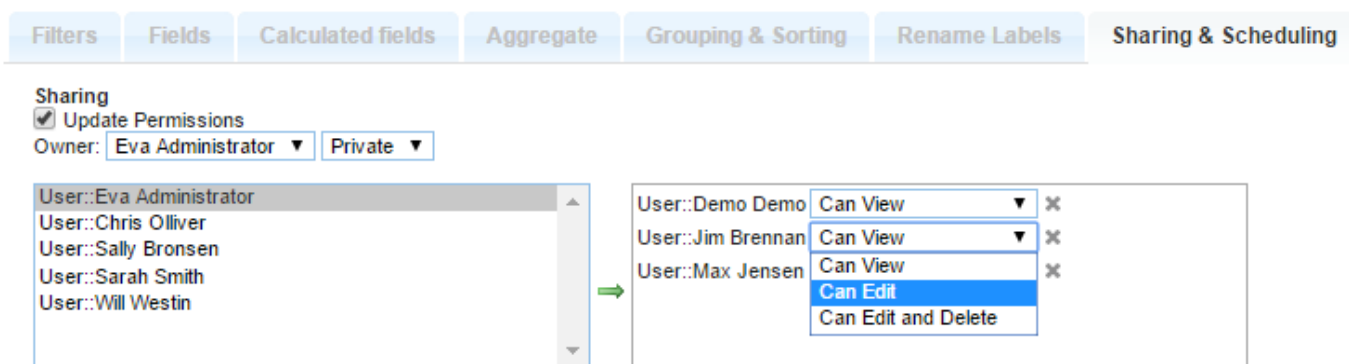
Remember to save the Report Label changes. If you are not sure, whether you want to Save the changed Report Labels, you can preview and exit the report without saving. You can also use the „Save as” option to keep the current report without changes and play with the new report at the same time.

REPORT PERMISSIONS - „SHARING & SCHEDULING” TAB

After you have installed the Sapiens.BI module, for security reasons all available pre-defined reports are available for admin users only (users with „Admin” checked). If the user profile has permissions to see the Sapiens.BI module, then

all users without admin permissions can only see empty folders and can not see any reports, until their report viewing permissions are changed.

- For each report under the „Sharing & Scheduling” tab the report owner (by default admin after the module installation) can set permissions to see, edit and delete for Individual users or for Roles (to apply permissions for all Users within a Role).
 - „View” permissions means that a user can open and preview report data with current settings. The user will not be able to change or save any of the report or chart settings and will also not be able to use the „Save as” button.
 - „Edit” permissions allows to change any of the report and chart settings and also to use the „Save as” option for copying an existing report. Edit permissions also automatically grant View permissions.
- The user identified as „Owner” can always see, edit and delete the report with chart.
- You can then set the report mode to „Public” or „Private”. „Public” reports will be visible to all CRM system users, who have Sapiens.BI module enabled for their profiles. For Public Report you can set permissions for all users- should they be able to only see this report and chart, or can they also edit or even delete it.
- If you set the Report mode to „Private”, then only the Owner can see, edit and delete this report. In addition to the owner you can identify either specific user(s) or user group(s) to be able to View, edit or delete the current report. Click on the User or Group in the left box, then use the green arrow to move it to the right-side box. Now you can identify permissions to View, Edit or Delete the report for each user or group by selecting the proper drop-down value next to the User/Group name.

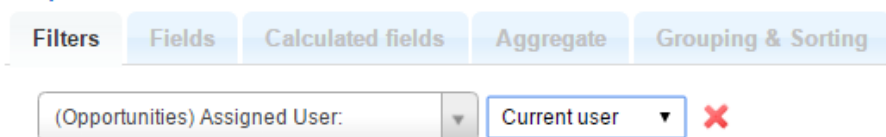


With the gray „X” in the right-side box you can remove User or Group permissions, this User or Group will no longer see the Report after the changes are saved.

All user permission setting changes under „Sharing & Scheduling” apply only after saving the Report (click the „Save” button above the report).

If you need to limit users to see only their data, you should use the filter “Current user”. With “Current user” filter you can limit the User access to the data. If such filter is set, each user will see only their assigned entries.

Report Editor



‘Current user’ filter will not be taken in account when report scheduled via e-mail in PDF and Excel format. Only link to the report will work with ‘Current User’ filter.

REPORT E-MAIL SCHEDULING - „SHARING & SCHEDULING” TAB

You can schedule regular Report sending by e-mail. To enable and schedule automated regular Reports first select the check-box „Schedule Report” under the „Sharing & Scheduling” tab. As soon as the check-box is selected, options for scheduling will appear.

First, you need to select the frequency from the drop-down menu. For example, if you select „Daily”, then the report will be e-mailed once per day. „Weekly”, „Monthly” and „Yearly” options are also available.

If you have selected „Daily”, then select what time this e-mail will be sent each day.

Weekly – which weekday (e.g. Monday, Tuesday, etc.) and time.

Monthly – which date and time;

For „Yearly” you can select which month of the year, date and time.

Scheduled e-mail time setting applies to report owner time zone which is identified in their user settings, taking into account CRM server time zone settings.

Under „Send report as format”, you can select one or several of the following options:

- „XLSX” to send the report attached to the e-mail in Excel format
- „PDF” to send the report as attached to the e-mail in PDF format
- „Send link to report” will send the e-mail with a link to this report

The e-mail subject will contain the report name and date sent.

Report Editor

The screenshot shows the 'Report Editor' interface with the 'Sharing & Scheduling' tab selected. The interface is divided into two main sections: 'Sharing' and 'Scheduling'.

Sharing Section:

- Update Permissions:** A checked checkbox.
- Owner:** A dropdown menu showing 'Eva Administrator' and a 'Private' status dropdown.
- User Selection:** A list of users on the left (User::Eva Administrator, User::Chris Oliver, User::Sally Bronsen, User::Sarah Smith, User::Will Westin) and a list of selected users on the right (User::Demo Demo, User::Jim Brennan, User::Max Jensen). Each selected user has a 'Can View' dropdown and a close 'x' button. A green arrow points from the left list to the right list.

Scheduling Section:

- Schedule Report:** A checked checkbox.
- Frequency:** A dropdown menu set to 'Daily'.
- Time:** Two dropdown menus set to '12' and '00' (hh:mm).
- Send report as format:** Three checked checkboxes: 'XLSX', 'PDF', and 'Send link to report'.
- User Selection:** A list of users and roles on the left (User::Demo Demo, User::Jim Brennan, User::Sally Bronsen, User::Sarah Smith, User::Will Westin, Role::Guest, Role::Management) and a list of selected users on the right (User::Max Jensen). A green arrow points from the left list to the right list. A green house icon is visible above the selected user.

To identify report recipients select from the available users/groups/roles from the left box and then move them to the right by clicking the green arrow.

E-mails are sent to the user e-mail address which is defined in the CRM system user settings.

You can remove an e-mail recipient from the selected list with the gray „x”.

All users, or users within a group or role appearing on the right side box will be receiving an e-mail with the report attached according to the scheduled settings.

It is important to always remember to Save the report for the e-mail scheduling changes to take effect.

CHART TYPES AND SETTINGS

Below the Report data you can find the Chart and Chart editor. Chart information is strictly related to Report data above and Report settings, such as Filters, Aggregates and Groups. This means that every time you change the Report settings in the Report Editor, you need to Save those settings in order to be able to see them changed accordingly in the Chart Editor before adjusting the Chart Settings.

In the Chart Editor you can identify the chart type and other chart settings. After changing the chart settings, click on „Preview” button inside Chart editor to see the new look of the chart. Changed chart settings are saved only after you save the Report.

In the „Title” area you can enter the Chart title. Hovering or clicking on the colored chart area will display the data represented by this area:

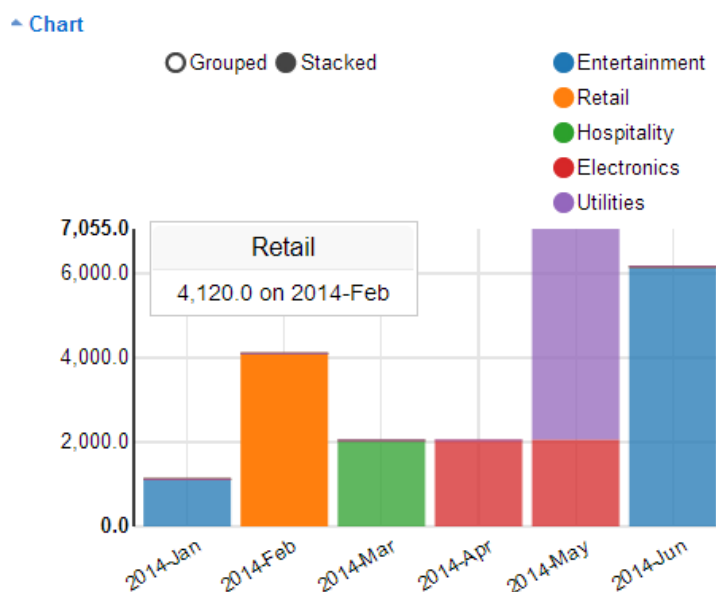
Chart Editor

Chart type Legend & Axis

Type: Column

Preview

Title: Sales Orders by Customer Industry by Status

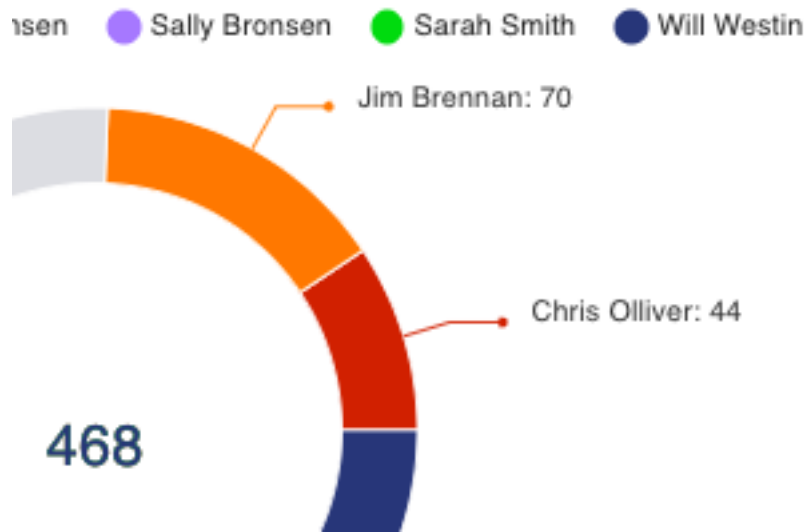


Clicking on the chart legend will hide/show the data.

By click to a gear icon you can use option to hide chart legend – all at once.

Customers Not Contacted by Sales Rep (last 60 days)

Chris Olliver Jim Brennan Max Jensen Sally Bronsen Sarah Smith Will Westin



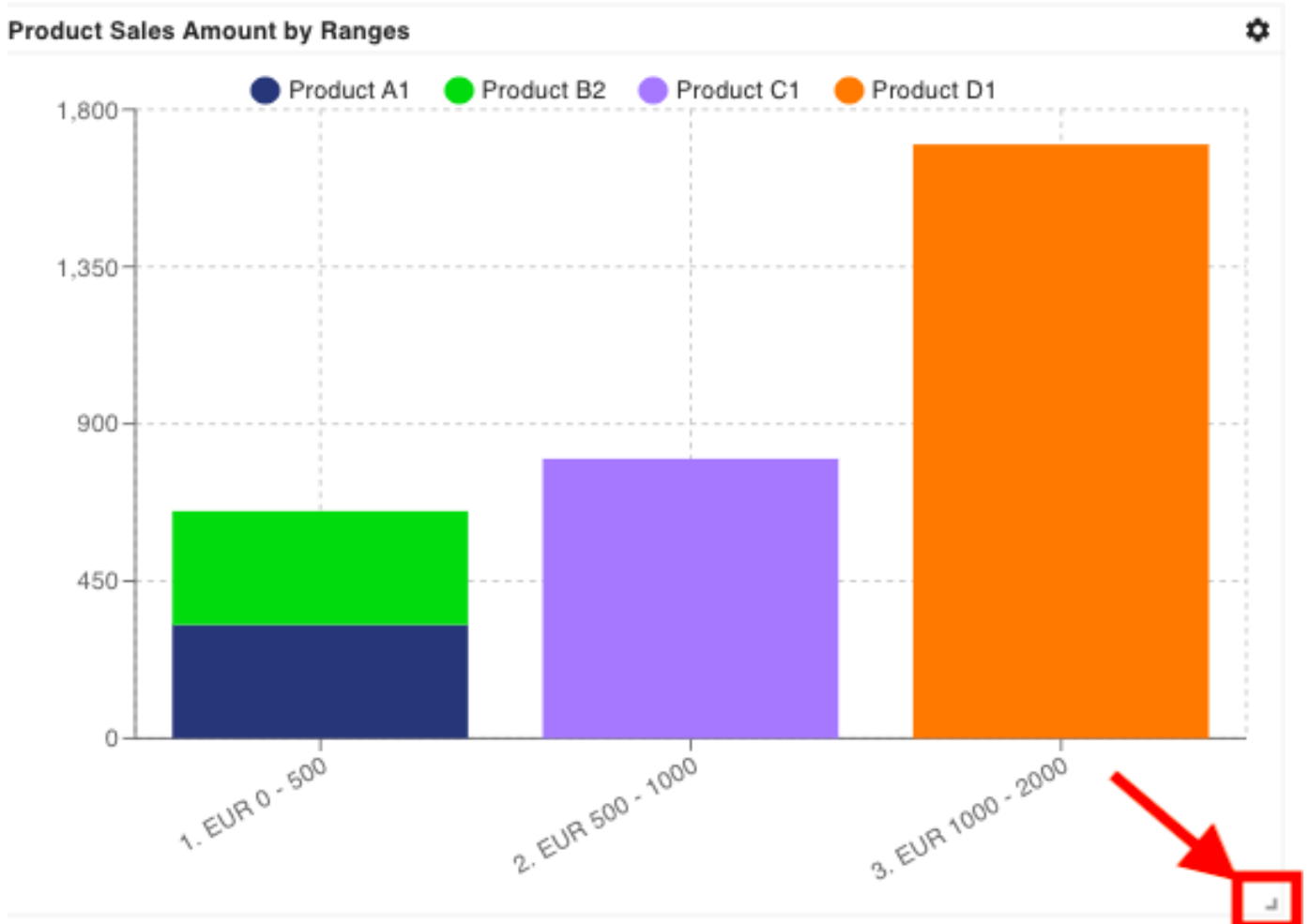
- Hide legend
- Save Chart as Picture
- Add To Homepage

Click to the gear icon and then „Save Chart as Picture” to save the Chart as a PNG format picture.

You can change the chart size by drag & drop of the bottom-right angle of the chart.

Chart size increase will also help you in case you have a large number of labels and they do not fit in the original chart size.

Chart



In the Chart Editor „Type” selection you can pick the necessary chart type: Pie, Column, Line,

← Chart Editor

Chart type Legend & Axis

Type:

Gauge

Pie

Column

Line

Pie Chart

If you have selected „Pie” chart Type, under the „Legend & Axis” tab you can choose Legend and Summary or Counted Value to be displayed by your chart. If you mark the „Show percent (%)” check-box, the percentage for each value will be shown next to it in brackets, as you can see in the example below.

Chart type Legend & Axis

Legend: (Campaigns) Campaign Name

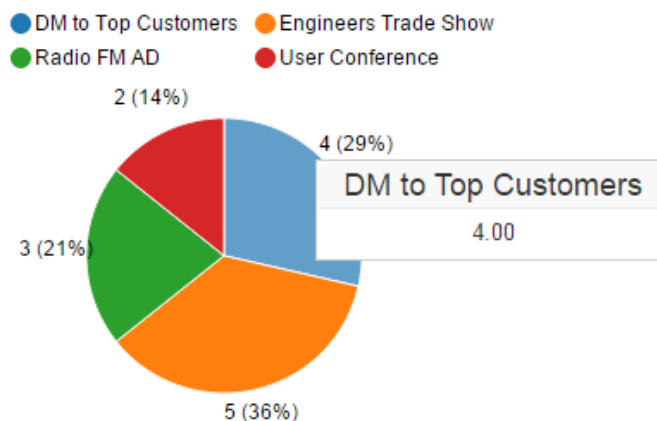
Value: (Organizations) Organization Number Count

Show percents (%):

Preview

Title: Number of Customers by Campaign

← Chart



Hovering or clicking on any chart area will display the data represented by this area. Clicking the circles next to the Chart Legend will hide/show the corresponding data in the chart. It is important to Save the report if you want your new chart settings to be saved.

Column Chart

If you have selected the „Column” chart type, under „Legend and Axis” you can identify the group from your Report which should be represented by the Primary Horizontal Axis. The summary, count or average should be selected for the Secondary Vertical Axis. You can select more than one of the Summary Aggregates under Secondary Vertical Axis, in this case the „Legend” should be same as selected under Vertical Axis. Otherwise it can be any of the Groups from your report.

Chart Editor

Chart type

Legend & Axis

Primary Horizontal Axis: (Sales Order) Due Date ▼

Secondary Vertical Axis: (Sales Order) Sub Total Sum ⇅

Legend: (Organizations) Industry ⇅

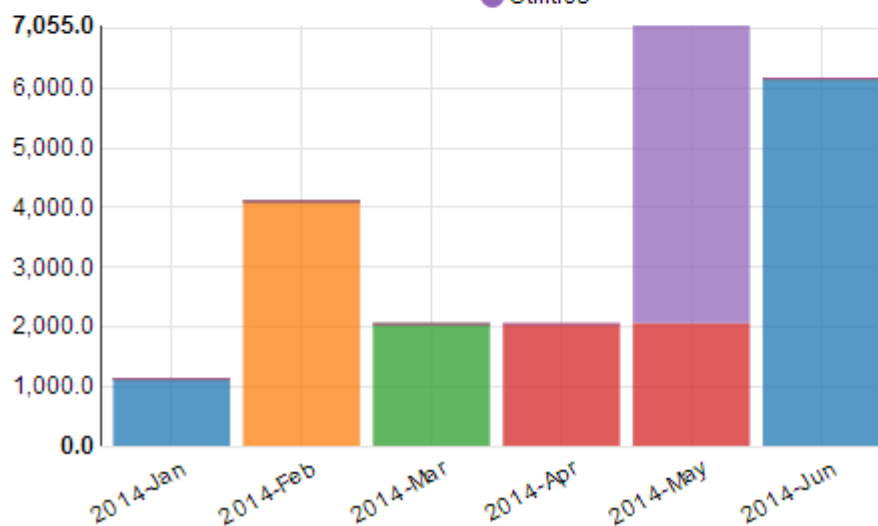
Preview

Title: Sales Orders by Customer Industry by Status

Chart

○ Grouped ● Stacked

● Entertainment ● Retail
● Hospitality ● Electronics
● Utilities



For Column chart you can select „Grouped” or „Stacked” data representation. Hovering or clicking on any chart area will display the data represented by this area. Clicking the circles next to the Chart Legend will hide/show the corresponding data in the chart. It is important to Save the report if you want your new chart settings to be saved.

Line Chart

If you have selected the „Line” chart type, under „Legend and Axis” you can identify the group from your Report which should be represented by the Primary Horizontal Axis. The summary, count or average should be selected for the Secondary Vertical Axis. You can select more than one of the Summary Aggregates under Secondary Vertical Axis, in this case the „Legend” should be same as selected under Vertical Axis. Otherwise it can be any of the Groups from your report.

Chart Editor

Chart type Legend & Axis

Primary Horizontal Axis: Date

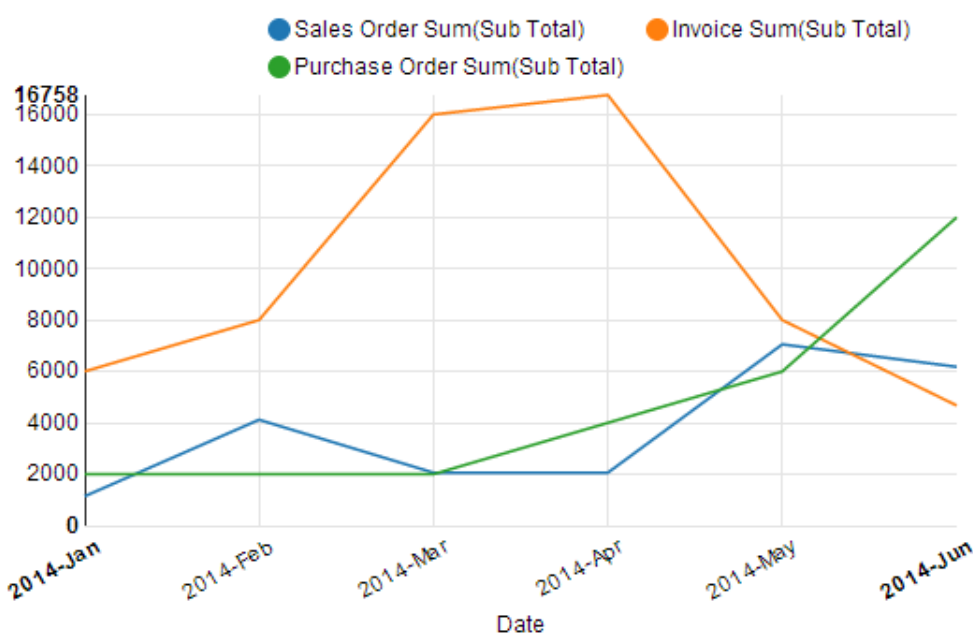
Secondary Vertical Axis: 3 selected

Legend: 3 selected

Preview

Title: Quote, Sales Order, Invoice & Opportunity by Month

Chart



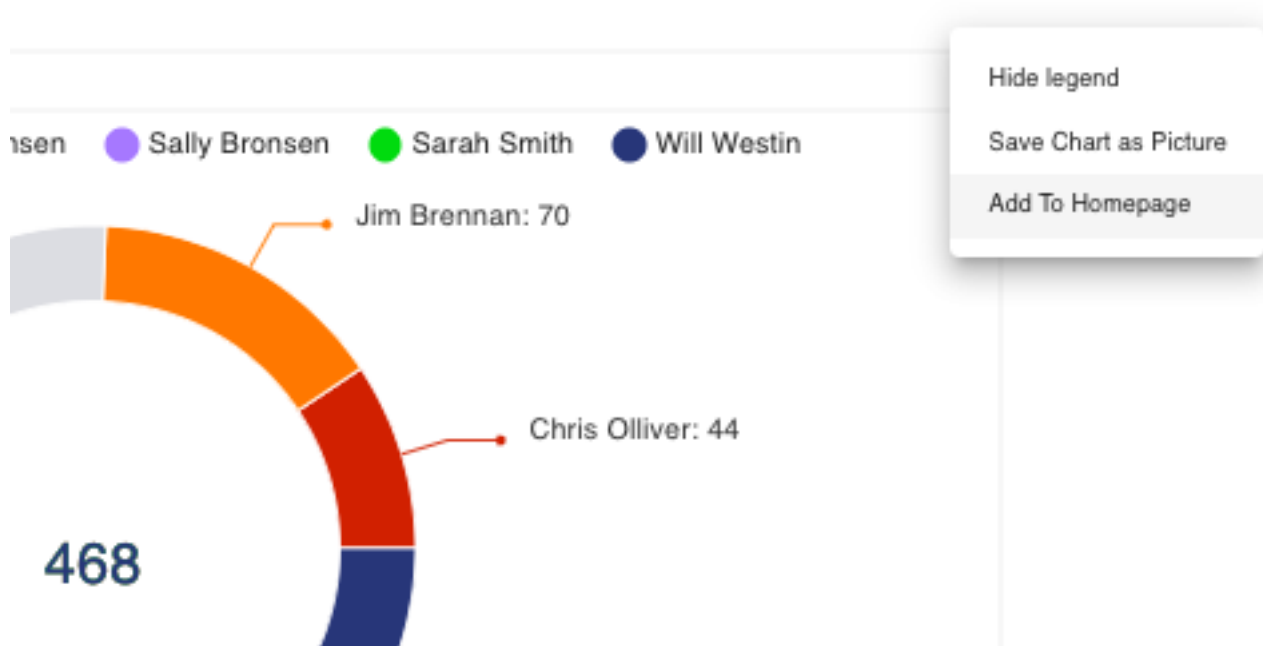
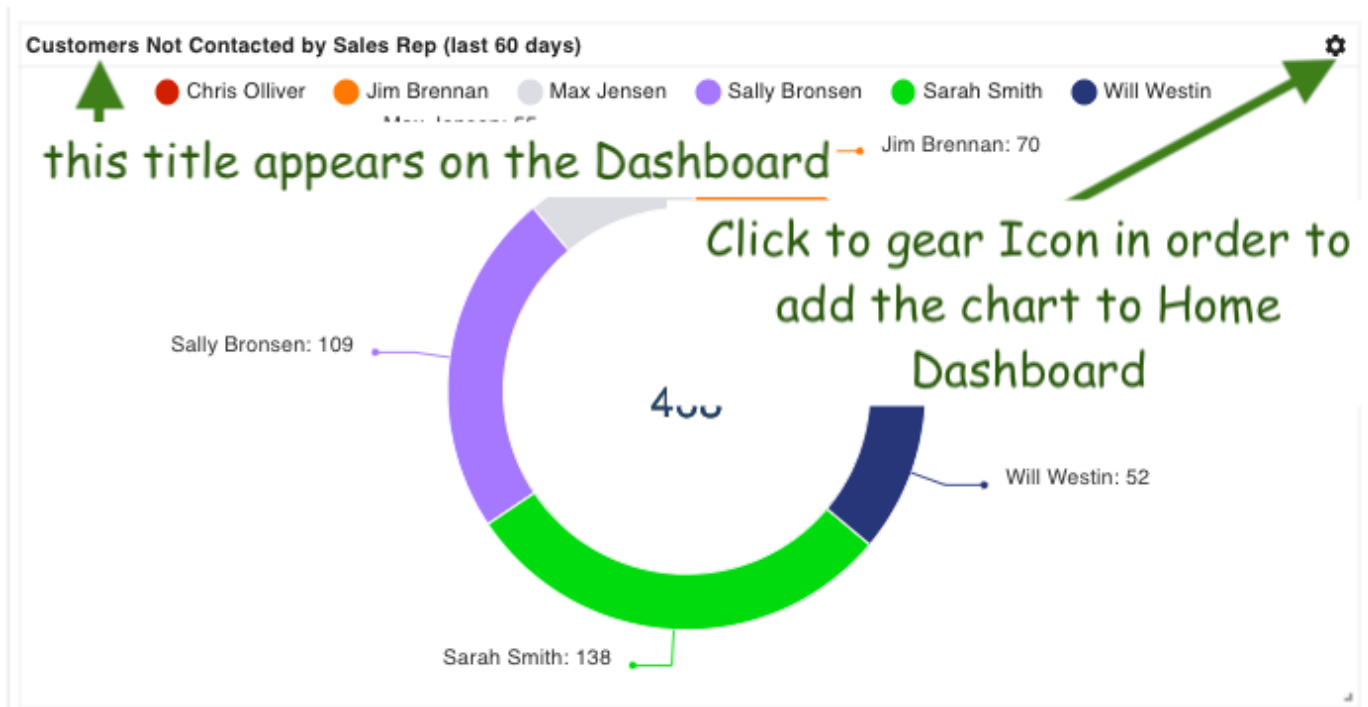
Hovering or clicking on any chart segment will display the data represented by this segment. Clicking the circles next to the Chart Legend will hide/show the corresponding data in the chart. It is important to Save the report if you want your new chart settings to be saved.

Adding a Chart to the Homepage Dashlets

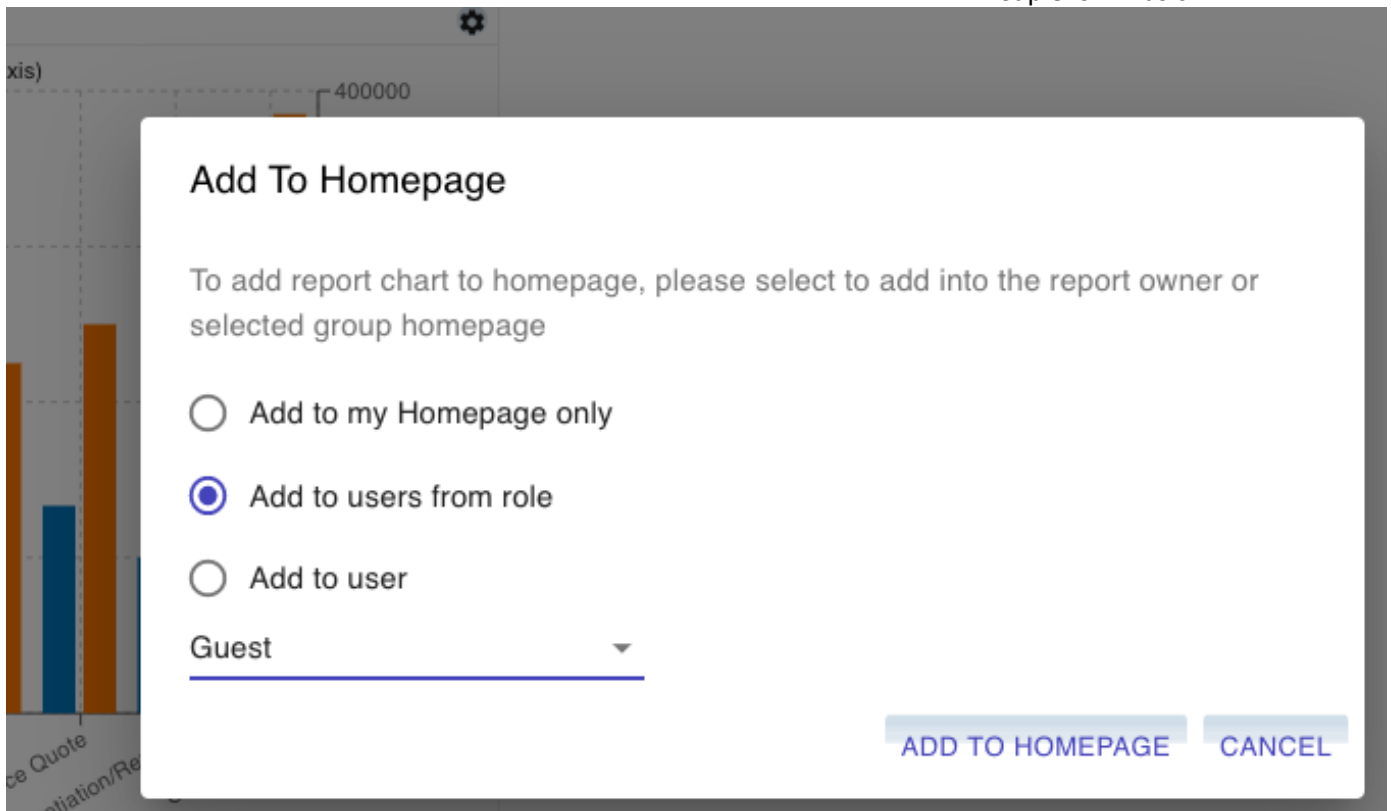
You can add the charts to Sugar / SuiteCRM standard built-in Dashboards or you can create New Sapiens.BI Dashboard and add the charts and tables to that Dashboard.

Adding Chart to built-in Dashboard:

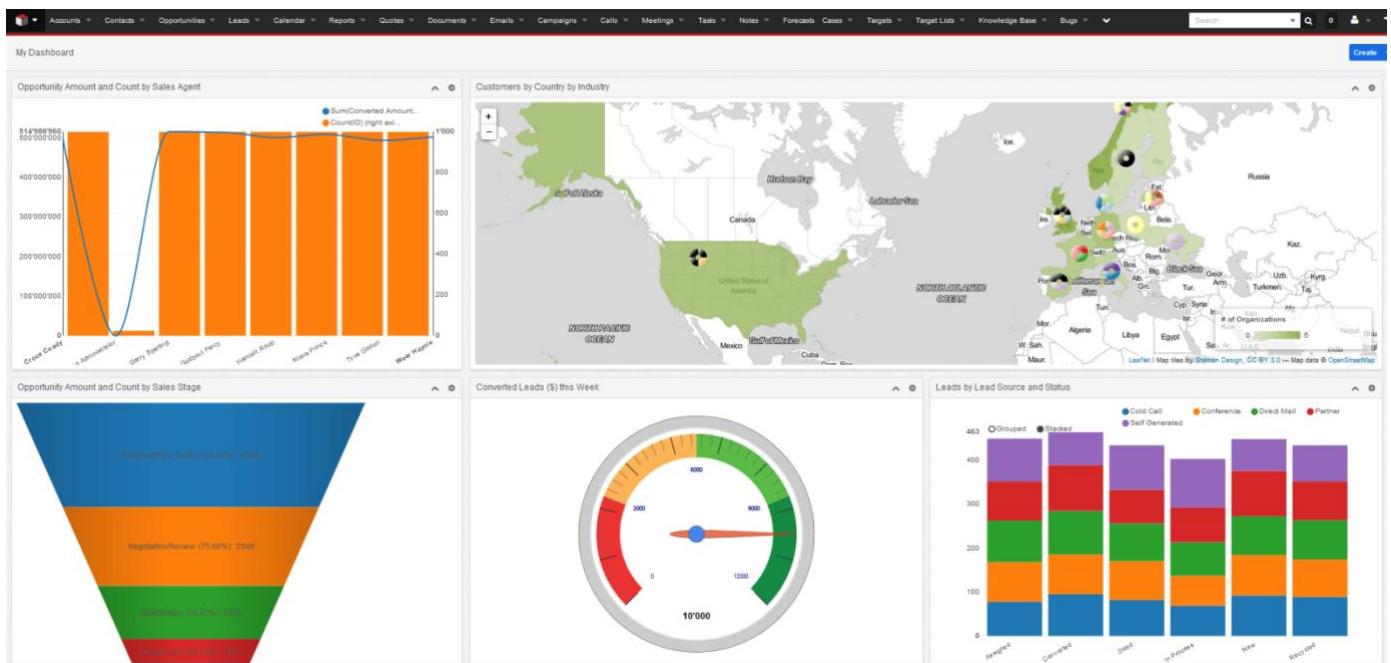
When the report is open, you can add the chart to your Home Dashlets. Click the gear icon and then „Add to Homepage” link to add this chart to your CRM system Homepage Dashlets.



If you are an admin user or report owner, you can also add the chart to other user's home dashlets. You can either add it to all users within a selected role, or a specific user. After clicking “Add to Homepage”, the current chart will be added to the dashlet according to your options.



After a pop-up confirmation the Chart and its Title will appear in your CRM system Homepage Dashlet:



On the Homepage charts are still interactive (i.e. displays the information on mouse-over represented by the area, can hide/show by clicking on the legend, etc.).

Clicking the Chart Title link inside the Homepage Chart Dashlet will open the corresponding Report and Chart. Changed and saved Report or Chart settings will apply to charts in the Homepage Dashlet as well.

However you can only add the chart to your default home dashboard and you can't add it to any other dashboard if you are doing the way it is described before.



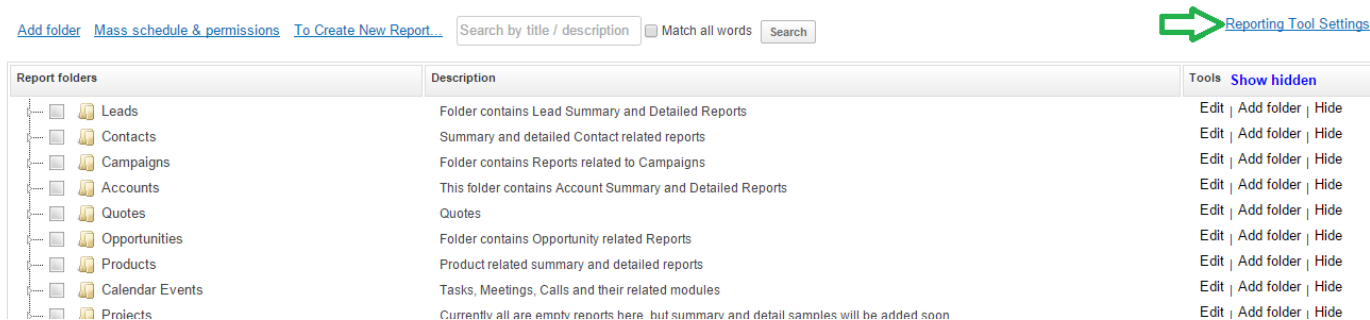
Sapiens.BI Basic

In order to add Chart to any other Dashboards, you can follow standard Sugar / SuiteCRM procedure – go to the Dashboard, click to add dashlets and then select Sapiens.BI Chart from a list.

CREATING NEW REPORT TEMPLATES VIA REPORT BUILDER

It is recommended to start from an already pre-defined report template, and then use “Save as” in order to add a new Report (you can use Search to find a report by related modules). However, if there is no report with your necessary module or required relationships, or if you have a custom module, you can create a new report template using the Report Builder.

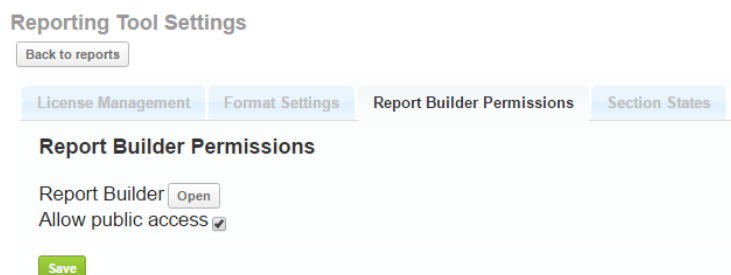
1. The Report Builder is located under “Reporting Tool Settings” in the top-right corner of the Sapiens.BI folder list. “Reporting Tool Settings” link is visible and available only for admin users.



Report folders	Description	Tools
Leads	Folder contains Lead Summary and Detailed Reports	Edit Add folder Hide
Contacts	Summary and detailed Contact related reports	Edit Add folder Hide
Campaigns	Folder contains Reports related to Campaigns	Edit Add folder Hide
Accounts	This folder contains Account Summary and Detailed Reports	Edit Add folder Hide
Quotes	Quotes	Edit Add folder Hide
Opportunities	Folder contains Opportunity related Reports	Edit Add folder Hide
Products	Product related summary and detailed reports	Edit Add folder Hide
Calendar Events	Tasks, Meetings, Calls and their related modules	Edit Add folder Hide
Projects	Currently all are empty reports here but summary and detail samples will be added soon	Edit Add folder Hide

2. Click to open the tab “Report Builder”:

First of all, here you set permissions to report builder by selecting “Allow public access” and saving. If you keep this checkbox un-selected, after “Save” only admin users will be able to create new reports via Report Builder.



Reporting Tool Settings

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License Management | **Format Settings** | **Report Builder Permissions** | Section States

Report Builder Permissions

Report Builder

Allow public access

Click “Open” next to “Report Builder” in order to Open it. Simple report builder will open first, it has an easy User Interface, but can be limited in case you have some custom relationships. In case Simple Report Builder functionality doesn't meet your needs, admin users can open Extended Report Builder by clicking the “Extended” button.

Report Builder

Report Folder

Report Name

Report Description

Report type

Add audit tables

Add custom tables

+

+

- 3.1. Under “Report Folder” please choose the Report folder, where the new report will be stored
- 3.2. Enter the Report Name and Description
- 3.3. The recommended Report Type is “Standard”; “Combined” reports will be covered later in this section.
- 3.4. Select the main module for your new report. If you don't need any further modules click “Save”;

Reporting Tool Settings

Report Builder

Report Folder

Report Name

Report Description

Report type

+

After saving, the status “Saved” will appear along with the link “Open Report”. You can open the new report by following this link. Please remember to add the necessary columns and data for your report under “Fields” tab, as well as to add other needed settings and then “Save” again.

If non-admin users have granted permissions, they can open the report builder by clicking the link in Sapiens.BI report and folder list:

[Add folder](#)
[Mass schedule & permissions](#)
[Report Builder](#)

 Match all words

Report folders	Description
Leads	Folder contains Lead Summary and Detailed Reports
Audit	Folder contains reports with Audit examples
Contacts	Summary and detailed Contact related reports
Accounts	This folder contains Account Summary and Detailed Report
Campaigns	Folder contains Reports related to Campaigns
Quotes	Quotes

Adding a second module to the new report:

If you need to add a second related module, stay in the Report Builder (without Save) and click the green “+” next to the selected main module. In our example below, “Accounts” is the main module. Clicking the “+” in front of “Accounts” we added a second row – and selected Leads as our related module.

Report Name

Report Description

Report type

← Main module

Related module

 =

Simple Report Builder has only the option to select module names, while Extended Report Builder will also allow you to identify the relationship, like in the example above.

In case you have more than one module added to your report, the correct choice of the main module is important. This means that all entries from the main module will be displayed in your report, but only matching entries from the related modules will be added.

In our example, all Accounts will be displayed in the report, even those Accounts, which don't have a related Lead. However, only those Leads that are related to an Account will be shown. Leads without an Account will not be shown.

If you do not want to see all the entries from the main module, you can later on limit those by filters. This way we are more flexible to various reporting needs.

3.5. When a related module is selected the relationship fields need to be identified. In most cases those are ids, and if matching ids are identified by the system, they will be set automatically.

In our case it is the account_id in the Leads module, which is related to the Account module id field. Relationship “One to many” is identified by default and recommended. Still sometimes module relationships are more complicated and require a many-to-many relationship. Reporting tools often don't support those. We have tried

to be more flexible, and allow a many-to-many relationship selection even via the user interface. Please see the “Many-to-many relationship” topic for instructions.

If you need a report with no more than the two selected modules, click the “Save” button at the top of the Report Builder.

After saving, the status “Saved” will appear along with the link “Open Report”. You can open the new report by following this link. Please remember to add the necessary columns and data for your report under “Fields” tab, as well as to add other needed settings and then “Save” again.

3.6. Adding further related modules

When adding more than two related modules, it is very important to identify, which relations to use as often modules are related to each other in more than one way.

Continuing our previous example, if we want to add the Contacts module, we can decide to see all contacts which were related to Leads. In this case click the green “+” near Leads and then select the Contacts module. But if we require Contacts that are related to Accounts, we should click the green “+” near Accounts.

Please see the difference below (it can also be seen from the hierarchy layout):

Report type
Standard

+ Accounts

+ × Leads account_id = Accounts id One to many

+ × Contacts id = Leads contact_id One to many

↑

With a click to “+” near “Leads” you have added contacts related to Leads module

Report type
Standard

+ Accounts

+ × Leads account_id = Accounts id One to many

+ × Contacts mkto_id = Accounts id One to many

↑

By a click to “+” near “Accounts”, we get Contacts module related to Accounts

3.7. Many-to-many relationship

A many-to-many relationship is necessary in cases when both entities can be related to several other module entities. For example, we can add several Accounts to the same Contact; and we can add several Contacts to the same Account.

In this case the Report Type is still “Standard”. Same as previously we first select the main module. In our example we want to see all Service Contracts, whether or not they have a Trouble Ticket related to them, so Service Contracts is the main module.

Next we add a new row and select “Helpdesk” as the related module and identify the relationship type “Many to many” instead of “One to many”.

An additional row is automatically added:

The screenshot shows a report configuration interface. At the top, there is a dropdown menu for "Report type" set to "Standard". Below it, a list of modules is shown: "Accounts" (with a green plus icon), "Contacts" (with a green plus and a red minus icon), and "accounts_contact" (with a green plus icon). The "Accounts" module is selected, and its "id" field is linked to the "id" field of the "Accounts" module. The "Contacts" module is also selected, and its "accounts_contact" field is linked to the "contact_id" field of the "accounts_contact" module. The relationship type is set to "Many to many". A green arrow points to the "Many to many" dropdown. At the bottom, there are buttons for "Save", "Saved", and "Open Report".

After you select "Many to many" relationship, one more row is automatically added, it is because for many-to-many relationship type there is one more table connecting modules

This is due to the fact, that Many-to-many relationships are defined through an additional table. Our Tool automatically detected the correct values. You can follow this example if you have similar cases.

You are welcome to contact our IT Sapiens team via: info@itsapiens.eu for further questions!