

Adaxia



**'Drill down' and 'Drill across'
Reporting**

DOCUMENT SUMMARY SHEET

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NOTES

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1 Executive Summary

ADempiere's architecture automatically provides a reporting function on all tables of information in the system that is accessible to a User. The Reporting functionality in turn provides the functionality to enable export of information to a variety of formats including spreadsheet formats.

In ADempiere this reporting capability is referred to as "Drill-Down" and Drill-Across" functionality. Knowledge of this functionality is fundamental to the effective use of ADempiere.

The following guide is produced to assist new users to master this reporting functionality.

2 Reporting Process

2.1 Introduction

The following pages show an example of the drill-down and drill-across functionality in ADempiere using the standard GardenWorld demonstration client in ADempiere.

Select the **Shipment Customer** window in GardenWorld and find Shipment Number 8000002. This is displayed below.

The screenshot shows the 'Shipment (Customer)' window in ADempiere. The window title is 'Shipment (Customer) GardenAdmin@GardenWorld.HQ [sjsworkstation{SJSWorkstation-oracle.adaxa.lan-compiere}]'. The menu bar includes File, Edit, View, Go, Tools, and Help. The toolbar contains various icons for navigation and actions. The main area is divided into several sections:

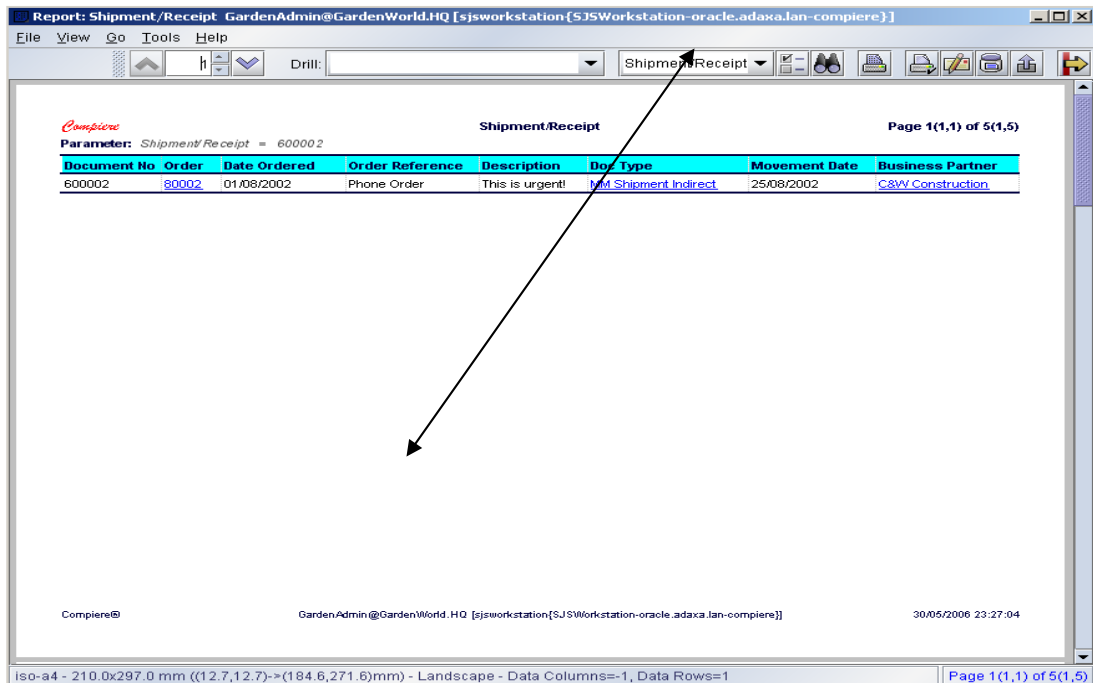
- Shipment Line:** Client: GardenWorld, Organization: HQ, Order: 80002, Date Ordered: 01/08/2002, Document No: 600002, Order Reference: Phone Order.
- Description:** This is urgent!
- Document Type:** MM Shipment Indirect
- Movement Date:** 25/08/2002, **Account Date:** 25/08/2002
- Business Partner:** C&W Construction, **Partner Location:** Stamford
- Warehouse:** HQ Warehouse, **Priority:** Medium, **Delivery Rule:** Availability, **Pick Date:**
- Shipment:** Delivery Via: Pickup, Freight Cost Rule: Freight included
- Status:** Movement Type: Customer Shipment, Document Status: Completed, In Transit, In Dispute, Date received: [empty]

Buttons at the bottom right include 'Create Confirmation', '<None>', and 'Posted'. A black arrow points from the 'Date Ordered' field to the 'Priority' field.

2.2 Create a Report

Create a Report by clicking on the Report icon (see arrow above).

The created report will look like the following screenshot and will display a report of that particular Shipment. The displayed fields are determined by the Report Format chosen. If there are multiple report layouts available then they will be accessible from the dropdown list to the left of the binocular icon in the screenshot below. The creation of additional report formats is outside the scope of this document.



The screenshot shows a web browser window displaying a report. The title bar reads "Report: Shipment/Receipt GardenAdmin@GardenWorld.HQ [sjsworkstation{5JSWorkstation-oracle.adaxa.lan-compiere}]". The menu bar includes "File", "View", "Go", "Tools", and "Help". A toolbar contains a "Drill:" dropdown menu, a "Shipment/Receipt" dropdown menu, and several icons including a binocular icon. The report content is as follows:

Compiere
Shipment/Receipt Page 1(1,1) of 5(1,5)
Parameter: Shipment/Receipt = 600002

Document No	Order	Date Ordered	Order Reference	Description	Doc Type	Movement Date	Business Partner
600002	60002	01/08/2002	Phone Order	This is urgent!	M Shipment Indirect	25/08/2002	C&V Construction

At the bottom of the report area, the text "Compiere" is on the left, "GardenAdmin@GardenWorld.HQ [sjsworkstation{5JSWorkstation-oracle.adaxa.lan-compiere}]" is in the center, and "30/05/2006 23:27:04" is on the right. The status bar at the bottom of the browser window shows "iso-a4 - 210.0x297.0 mm ((12.7,12.7)->(184.6,271.6)mm) - Landscape - Data Columns=1, Data Rows=1" and "Page 1(1,1) of 5(1,5)".

2.3 Select Report Content

Searching for More Records:

To search for more records click on the Binocular icon (see arrow above). The search box (see screen shot below) will be displayed allowing selection of the desired records.

The screenshot shows a web browser window displaying a report titled 'Shipment/Receipt'. The report is on page 1 of 5. A dialog box titled 'Lookup Record: Shipment' is open, allowing the user to search for records. The dialog box has two tabs: 'Lookup Record' and 'Advanced'. The 'Lookup Record' tab is active, showing three search criteria: 'Document No' with a value of '%', 'Description' with a value of '%', and 'Business Partner' with a dropdown menu. The report table below the dialog box has the following data:

Document No	Order	Date Ordered	Order Reference	Description	Doc Type	Movement Date	Business Partner
600002	80002	01/08/2002	Phone Order	This is urgent!	MM Shipment Indirect	25/08/2002	C&V Construction

How to select the Records:

Option 1:

If you wish to select ALL RECORDS then simply click the green tick box

Option 2:

If the criteria you wish to enter are displayed in the "Lookup Record" tab then enter the desired selection criteria.

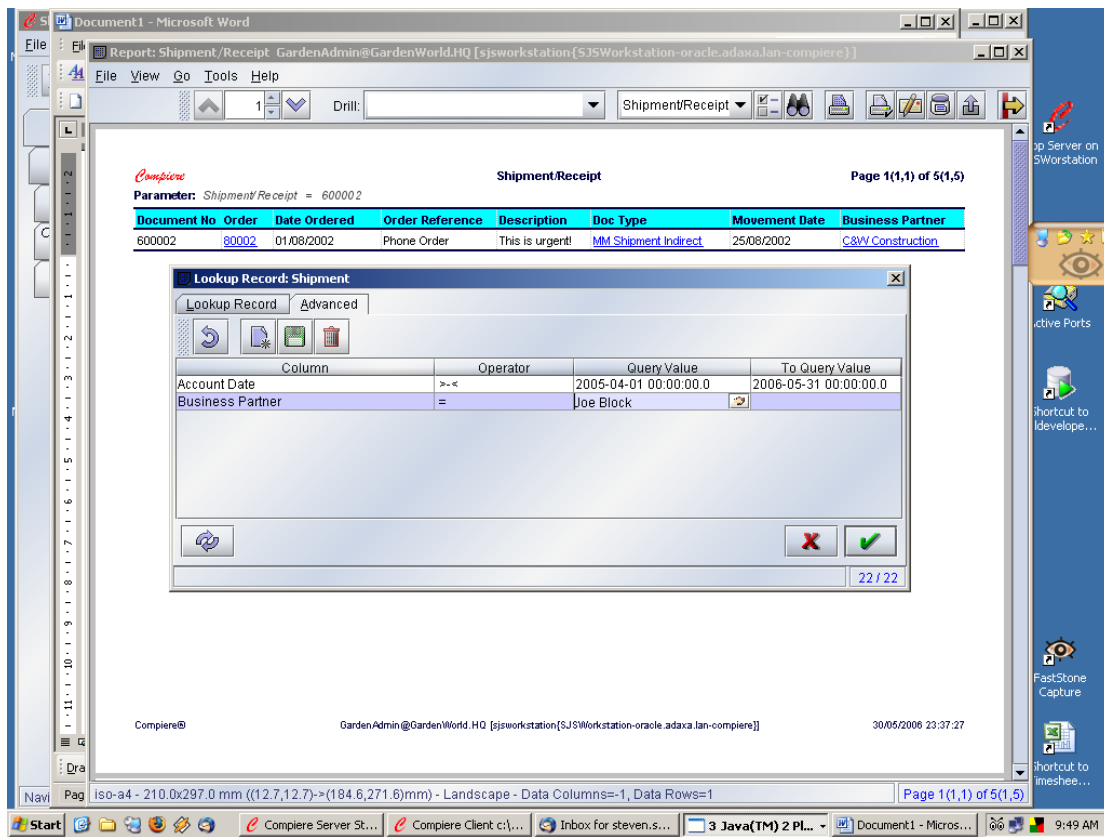
Option 3:

If the desired selection criteria are not displayed in the "Lookup Record" tab, click on the "Advanced" tab and then the "Column" dropdown. Enter the required selection criteria.

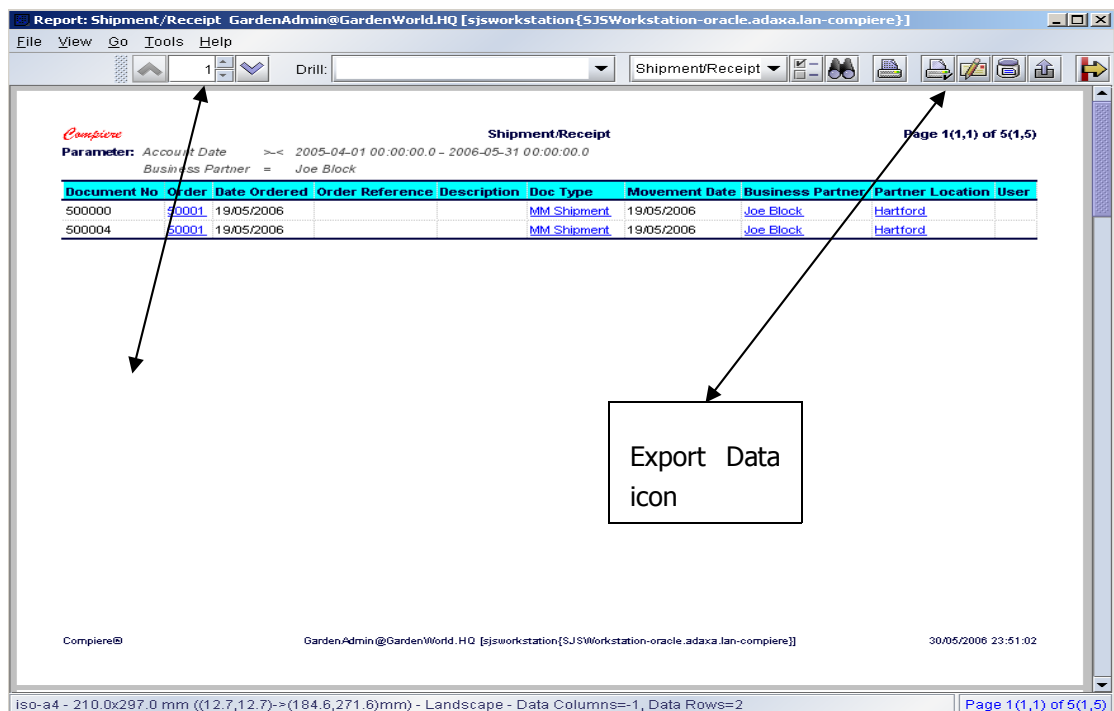
For example, if you select "Account Date" you will be prompted for a start date and an end date. If you click Save (the floppy disk icon) and then New Record then further selection criteria can be added to the query.

When selecting text fields remember to use the "like" operator (~) not the "equals" operator

The example below shows a date range selection AND a Business Partner selection.



Click on the green tick box and the Report will be created showing the Shipments for that Business Partner in the selected date range (as below):



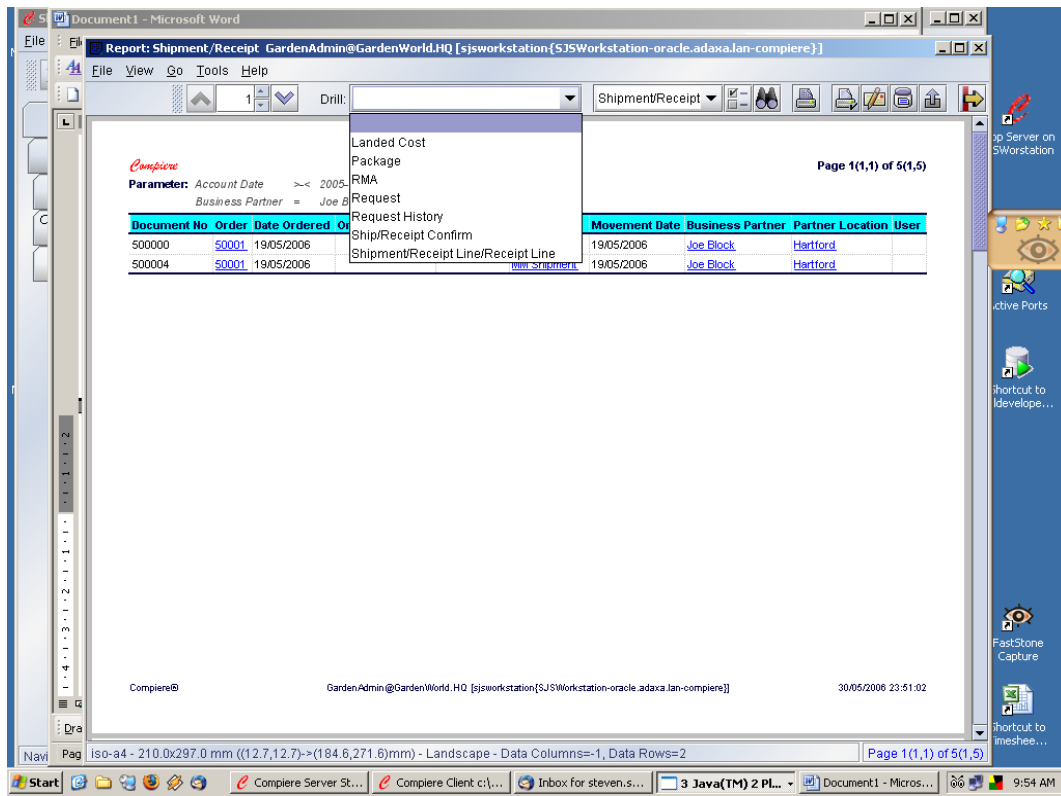
2.4 Exporting Report Data

If you wish to export the data to a spreadsheet then for more analysis then click on the icon with the upwards pointing arrow (see Export Data icon in screenshot above) and save the file as a CSV or TAB file. You can then open the file with your spreadsheet.

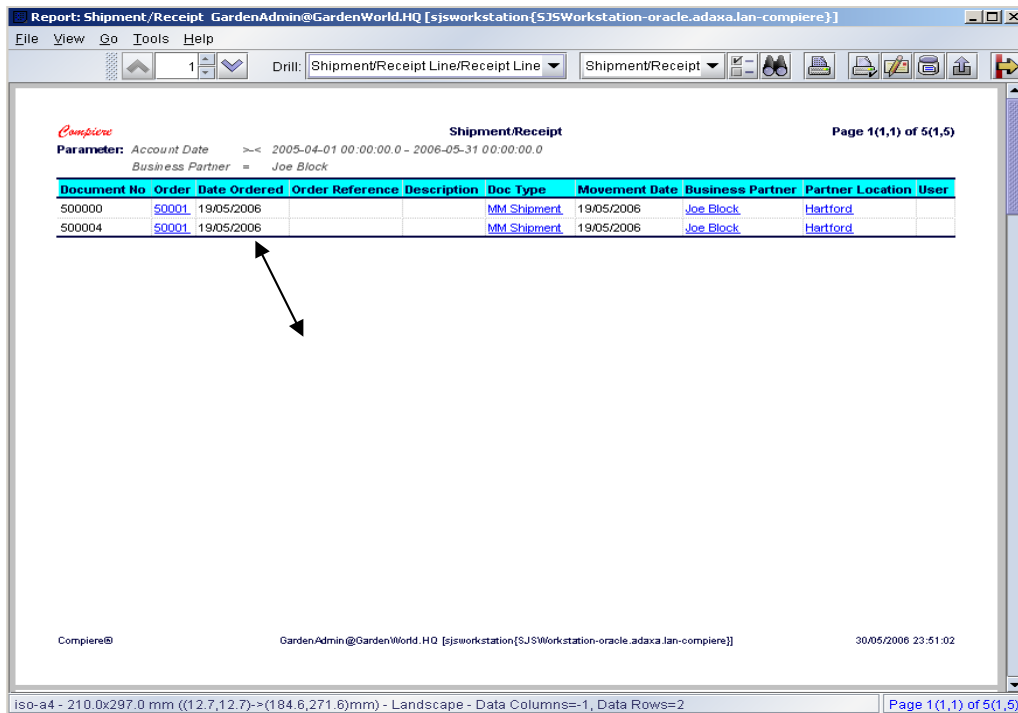
2.5 Drilling to Related Records

From the displayed report, it is then possible to drill further into the data by making a selection from the "Drill" dropdown box.

Clicking on the Drill Box (see left side arrow in screenshot above) opens the dropdown box shown in the screenshot below and shows we can drill to a variety of related records. We will drill to the "Shipment Lines" by selecting that option in the dropdown list.



And with the Shipment Lines option selected the screen looks like



If we now double click in the report line (pointed to by the arrow above) then a new report will be created showing the Shipment Line(s) for that particular Shipment as below.

Report: Shipment/Receipt Line GardenAdmin@GardenWorld.HQ [sjsworkstation{SJSWorkstation-oracle.adaxa.lan-compiere}]

File View Go Tools Help

Drill: Shipment/Receipt Line

Compiere®

Parameter: *M_InOut_ID* = 1000784

Shipment/Receipt Line Page 1(1,1) of 3(1,3)

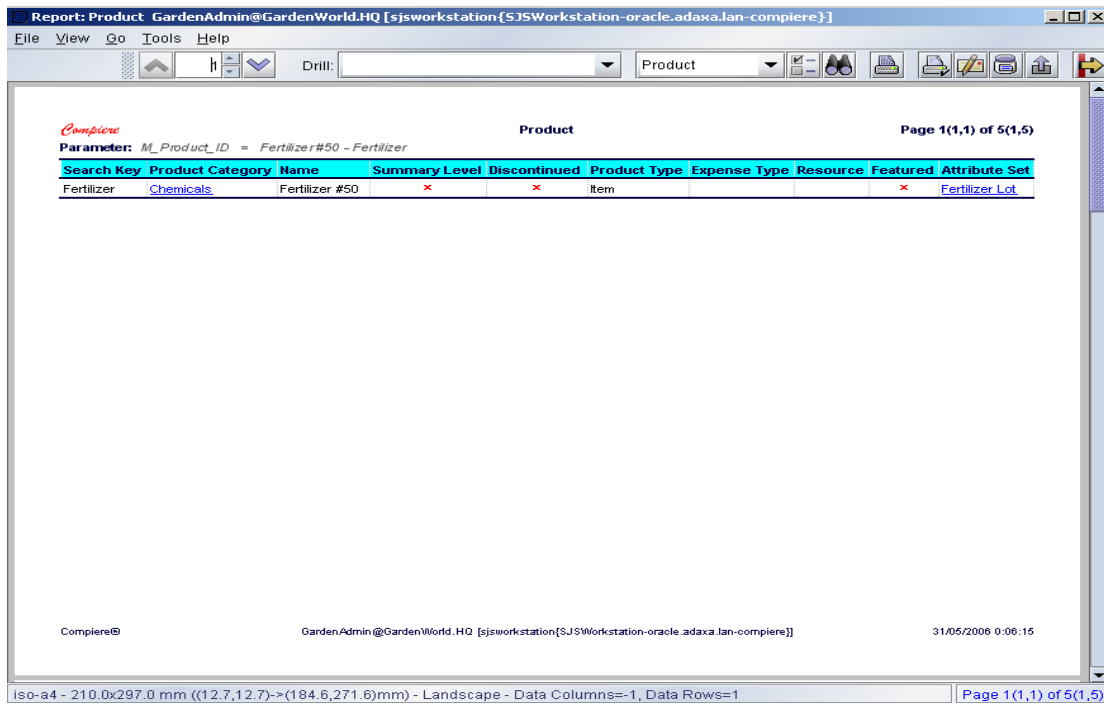
Line No	Shipment/Receipt	Order Line	Product	Attribute Set Instance	Locator
10	500004 - 19/05/2006	50001 - 10 - Fertilizer #50 - Fertilizer	Fertilizer #50 - Fertilizer	e12345 - 07/11/2006(1001435)	Default HQ Locator

Compiere® GardenAdmin@GardenWorld.HQ [sjsworkstation{SJSWorkstation-oracle.adaxa.lan-compiere}] 30/05/2006 23:59:42

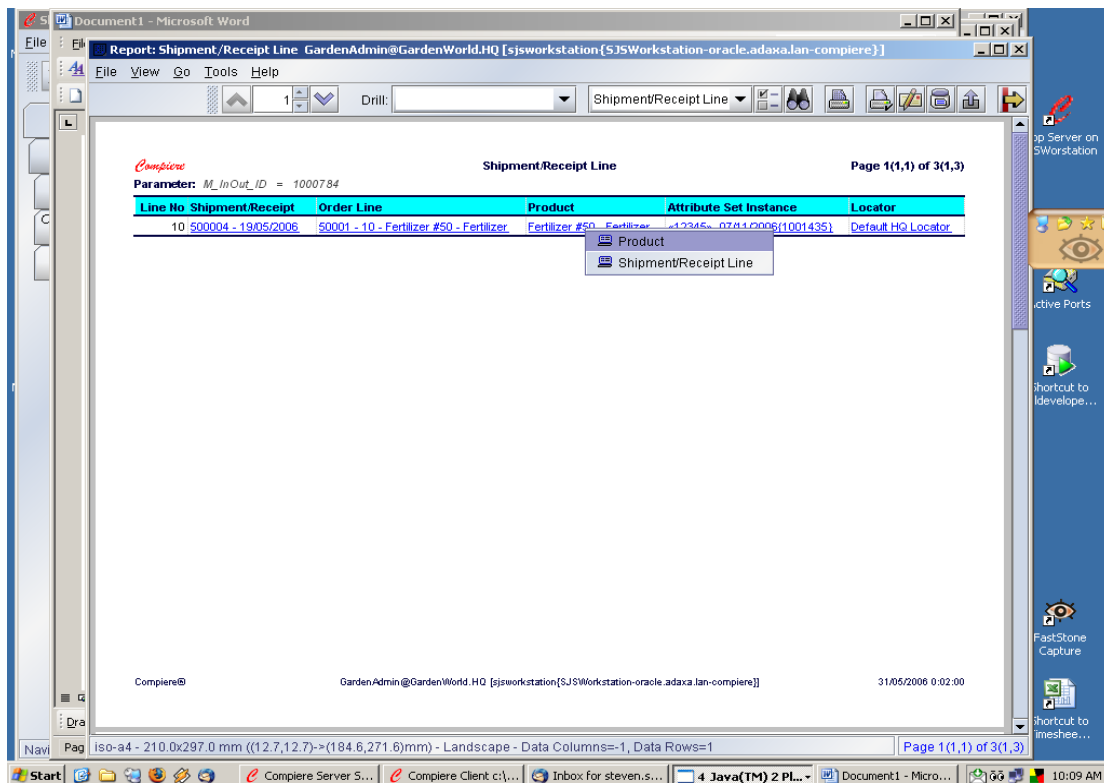
iso-a4 - 210.0x297.0 mm ((12.7,12.7)->(184.6,271.6)mm) - Landscape - Data Columns=1, Data Rows=1 Page 1(1,1) of 3(1,3)

If the "Drill" field is empty, and we click on blue text then we will be taken to a report of that record, so if we click on the Product "Fertiliser #50 – Fertiliser, then we are taken to a report of that Products information as shown below.

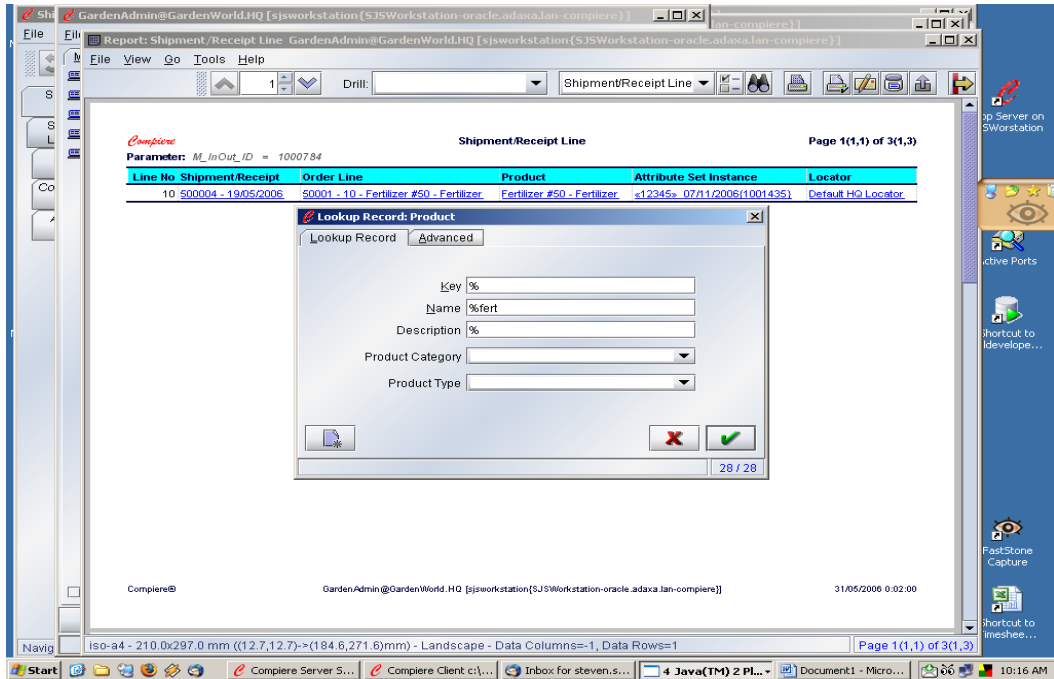
If we have selected a value in the "Drill" field we will be taken to the child records of that record, eg if we are in a report of Sales Orders and we choose "Drill" to Sales Order Lines then that is where we will be taken.



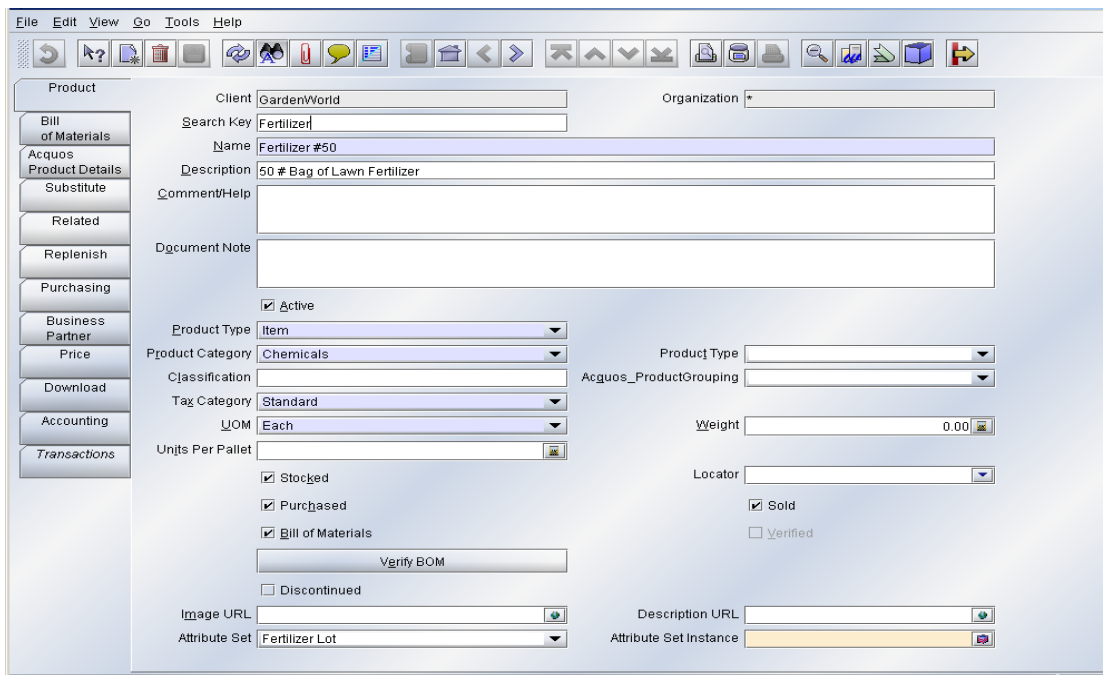
If we right-clicked on the **Product** shown in blue text then other options would display as shown below.



If we then left click on the word Product we are taken to a search box for products (see below) where we can enter the product code and go to the product record. [This seems to be an error because logically it should take us to the already selected record however it is easy enough to enter the product value or name.



This takes us to the Product record as below.



3 Adaxa's Offices and Contacts

Information of a general nature about Adaxa and its services can be found at www.adaxa.com or obtained by sending an email to info@adaxa.com with a description of the information that you would like to receive. If you are an existing client and wish to initiate a request for software support please send an email to helpdesk@adaxa.com with as much detail as possible about the nature of your support request.

For all other information please contact the Adaxa office nearest to you.

3.1 Australia

Address: 10 Kylie Place, Cheltenham, Victoria 3192 Australia

Contacts: Office

📞 1300 990 120 (Within Australia)

📞 +613 9510 4788 (Outside of Australia)

3.2 New Zealand

Address: 73 Boston Road, Mt Eden, Auckland, 1023, New Zealand

Contacts: Office

📞 0800 232 922 (Within New Zealand)

📞 +649 9744 600 (Outside of New Zealand)

3.3 United States of America

Address: 4400 NE 77th Ave, Suite 275, Vancouver, WA 98662, USA

Contacts: Office

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