Using the Metagon Reporting Designer

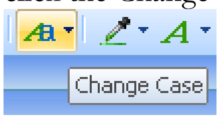
Note: *At any time, click on the Question Mark icon in the toolbar for the user manual.*

Items to be selected are shown in *italics*; screen labels are **bold**; text to be typed is in "quotes".

Action	Comments
Introduction to the Metagon Reporting Designer	
Open the Designer application	This is the component that will be used by those who want to create their own reports
Creating Reports with Existing Template	
	We're going to create a report that shows the employees with more than five years of service.
Click on the *HR* category (graphic looks like a file folder) and the *Employees* templates (graphic looks like a report)	By clicking on *Employees*, I immediately see what templates exist for me to use to jump-start my report design.
Click on the *Departmental Employees* template.	Note that all the data fields available for me to use in this report are listed on the left, under Employees. Let's modify this template.
Step 1: Select Fields	
Find *Salary* on the left, and double-click it. (Alternatively, you may right-click and choose Add to Detail, or click and drag it into the workspace on the right.)	This adds the Salary data field onto the report.
Click on the Arrange Fields icon on the far right of the toolbar  (Note that labels for the icons appear when you position your mouse over them without clicking.)	This brings up a list of the data fields in the report. Click on Salary, then on the up arrow to move it on top of the Title field. Click *Accept*. Note that the position of the fields in the workspace changes accordingly.
Step 2: Calculations	
Click **Build My Calculations** in the design wizard area on the left.	Note how similar this is to Excel. Also note the sample data that's been pulled into what we call the "sandbox", an area where we can play around without making final

	changes until we're satisfied with what we have. Let's say we just want to calculate monthly salary. To do that, we'll need to add a field on to the sandbox.
Scroll the sandbox area to the right to show empty column I. Click in the cell I1 to select it. Type Monthly Salary and hit Enter.	I've added this new field to the sandbox because we'll need it in a calculation, but it won't automatically show on the report; we'll take care of that later. Now, I'll create the calculation I need.
Click in cell I2 and type an Equals sign (=). Click in cell H2, then type "/12" and hit Enter.	Now we'll apply a calculation. We'll create a simple one ourselves, using the same syntax Excel uses. This is standard "Excel-speak" for dividing the Salary by twelve.
=Click on Cell I2 again to select it, and then click on **Use Selected** to the right just above the sandbox.	Look in the Calculated Fields area above the Sandbox to the left. When I tell Metagon Reporting to use the selected calculation, it converts the rather cryptic cell address into the field name, so it's easy to see that the formula divides Salary by 12.
Type "Monthly Pay" in the **Calculation Name** field, and click Save on the right. Note that this new field now appears under My Calculations on the left.	If you want, you can right-click Monthly Pay in the left explorer area and choose Publish My Calculated Field. This is important because you can save this formula and publish it for everyone to use in other reports, ensuring consistent calculations. If you do this, Monthly Pay moves to the Public Calculations part of the explorer list.
Step 3: Setting Filtering Criteria	
Click **Build My Criteria** in the design wizard area.	Once again, we have a sandbox of sample data, and an area to specify selection criteria for our report. Let's say we only want employees with 5 or more years of service.
From the My Fields list on the left, click and drag Salary to the Drag over Field area above the sandbox.	We're going to set a date limit for the salary, that the user can input each time the report is run.
Next to Select an Action, click on the drop-down list and choose **<**.	This will let us specify the latest allowable hire date.
Click in the **Variables** input area and type "50000"	This will be our salary threshold.
Click **Apply Criteria and Show Results**	Notice that the criteria I've specified are applied to my sample data. This lets me validate that I'm getting what I want. It is; so I'll save this formula just as I did with my calculations.

Click **Ask user for variable** to put a check in the checkbox.	This is what specifies user input when the report is run.
Click in **Criteria Name** and type "Salary Limit"; click **Save & Add.**	"Save" saved the criterion under My Criteria(s) on the left; I can also publish it for public use just as I did with the calculation. The "& Add" part incorporates this filtering criterion into the report definition, as we'll see below.
Step 4. Design My Report Layout	
Click **Design My Report** in the design wizard area.	Now let's format the report to look the way we want.
Look for *Monthly Pay* on the left under My Fields. Right-click it and choose Add to Detail	This is how we add calculated fields to the report.
Verify that *Salary Limit* shows in the **Selection Criteria** area. If not, click *Salary Limit* on the left and drag it to **Selection Criteria**.	This would be true if you had chosen **Save** instead of **Save & Add** above. This is also how you would add pre-existing selection criteria that had been saved in the past.
Notice the report title in the **Report Header** field. Position the cursor at the lower right corner until it becomes a double-headed arrow, and then click and drag to reduce the size of the text box. If you like, you can also edit or re-format the title using any of the MS Word-like tools at the top of the window.	If you're comfortable with formatting in Microsoft Word, this will be very familiar. Now, let's add a page number to the title area.
Click on the + sign next to **Header and Footer tools** in the explorer list (beneath **My Criteria**)	Here we see the variety of things we can add to the report header and footer areas. I can add a graphic logo, page number, etc.
Click on *Page Number* and drag it to the **Report Header** area. You may drag it where you'd like it positioned, and format it as you did the title	All the tools in this area may be clicked and dragged to the header or footer sections of the report. (Be aware that you won't see the footer items until you print the report.)
You may format column headings in the Page Header in the same way.	Notice that if you re-size or re-position the column headings, the associated data field areas in the **Detail Section** are affected as well.
Click on the **Font Size** drop-down and choose *12*.	I can format the fields using tools very much like what I'm used to in Microsoft Word.

In the **Page Header** area, right-click the Salary field and choose **Format -> Currency -> (1,234.10)**	There are many other formatting options available through right-click. Right-click formatting is available on the column headings, not on the data fields themselves. The formatting tools in the toolbar apply only to the item selected.
Click on the *Sample data* field below *Last Name*. In the tool bar, click the Change Case icon  and choose UPPER CASE.	Note that only the data field selected changes, not the column heading. This is because the tool bars at the top apply only to the selected item.
Step 5: Trial Run	
Click **Run My Report** in the design wizard area	This runs a sample report on a subset of the data. That looks pretty good; but if we wanted to change anything, we'd just go back to the appropriate section of the wizard and tweak it until we're happy.
In the two filtering fields presented, type "6/1/2003" and click Run Report.	This will produce a list of just those employees with five or more years of service.
Saving and Publishing Reports	
Click on **Design My Report** in the design wizard area	Once we're satisfied, let's save the report.
Click the **SaveReport** icon; type "Sample Report" in the **Report Name** field and click Save.	Saving the report is very straightforward.
Click the **Publish** icon and choose *Sample Reports* from the **Report Name** drop-down list.	And I have the option of giving others access to this report by publishing it. But only the author can make changes without changing the name.
Creating New Reports from Scratch	
Click the **Home** icon	Let's go back to our starting point and look at creating a report from scratch.
Click the *New* report template	By choosing the New template, I build my report from the ground up.
Click the **Add Report Type** icon; scroll through the chart list on the right.	The first thing I decide is what type of report to create. Here I choose from column, alert, cross-tab, and a wide variety of charting options.
	After that, it's the same process we went through

	before, just following the design wizard.
Wrap-Up	
	I hope you've seen how much power is built into the designer, and how I just use interfaces like Microsoft Office to select my fields, perform calculations and selections, and format the report. Never are you asked to do any SQL-like coding; never do you have to know where the data is or how to access it.