

Kx
USER
CONFERENCE
2019

KxPlorer Report Building

Introducing Quick Design



Quick Design

Original Problem

In order to run extracts, clients need knowledge of SQL and of the database structure, producing reports also has a steep learning curve needing knowledge around report builder. Kinetic Solutions can create reports and extracts for clients however this is usually chargeable work and if specifications change costly alterations are required. There was a need for a method for clients to be able to quickly design and run their own extracts as well as produce simple reports.

Overview

The Quick Design functionality was introduced to KxPlover in Kx2018 to allow clients to quickly create reports through a simple drag and drop interface. These can then be saved and updated as they see fit. Using Quick Design it's possible to create reports featuring fields from a variety of different sources, filtering and sorting the returned data to achieve the desired results.

A large, abstract graphic on the right side of the slide. It consists of several overlapping, rounded shapes in various shades of blue and teal. The word "Intro" is written in a large, white, sans-serif font in the center of the largest, darkest blue shape. The background of the slide is white, with decorative elements like a green and white striped pattern in the top right and bottom left corners, and a solid blue bar at the bottom.

Intro

Configuration

Quick Design functionality is controlled by feature access. Access can be provided to users of KxPlover via KxConfiguration.

KxConfiguration > Admin > Users > Edit User > Feature Access > KxPlover > Quick Design

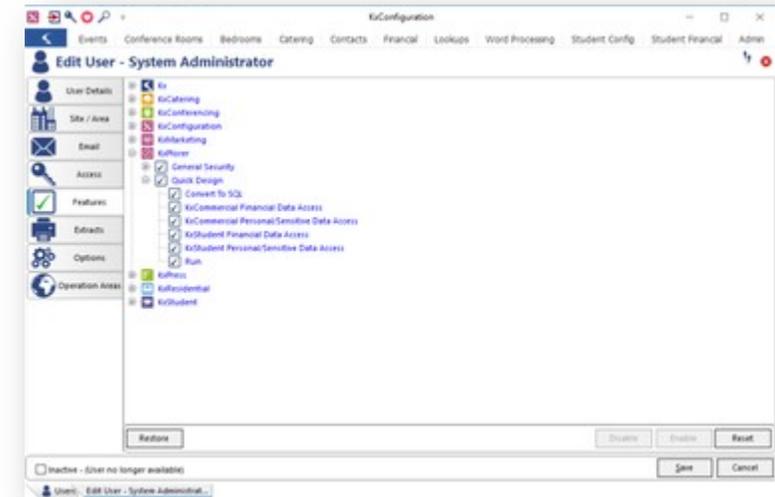
Select the 'Quick Design' property and click on the 'Enable' button.

You can also control whether a particular user is able to convert a quick design report to SQL and whether they should be able to run quick design reports (we recommend carefully controlling who has these permissions as they could potentially directly query and alter data in the database).

Please note in order to administer Extracts the user will also need the "Extract Report Admin" option enabled (ticked) in the "Options" tab.

Data Access Control

Fields that hold financial or sensitive data in both commercial and student applications can be excluded from quick design using these settings



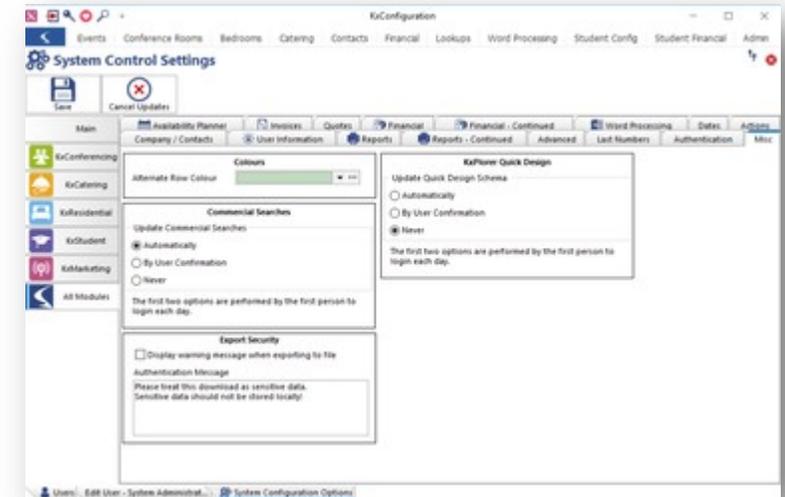
Updated Schema

Missing a field you need for a report? Ask us, with Quick Design new schema can be developed and updated without taking a new release of the back office applications. You can configure whether these updates are enabled or not via Control Settings in KxConfiguration.

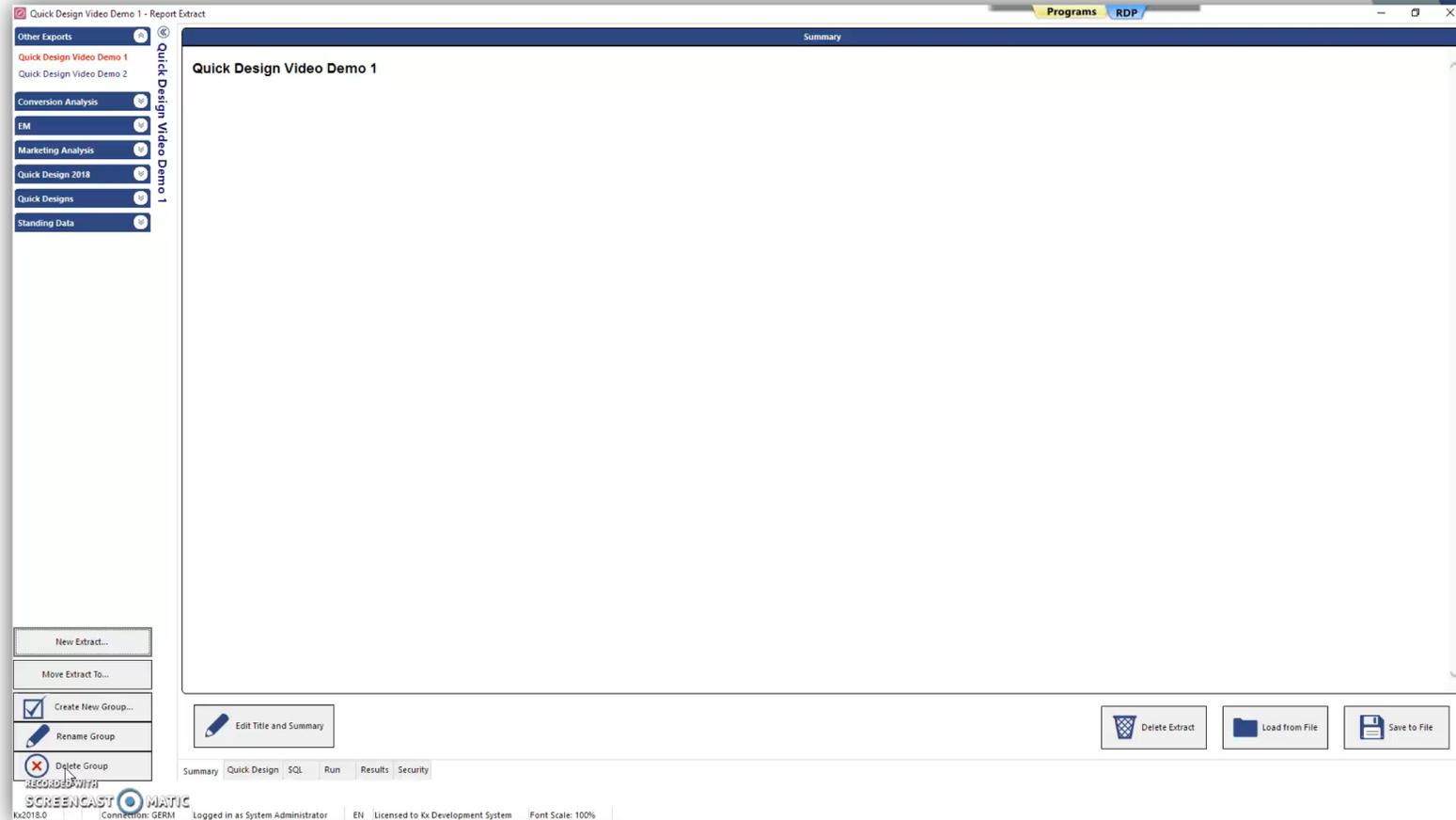
KxConfiguration > Admin > System Control Settings > All Modules > Misc

The Options are:

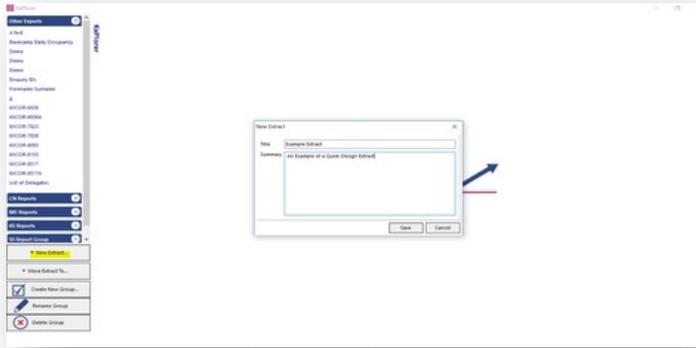
- Automatically Update (the first person who logs in on a particular day will trigger the schema download)
- By User Confirmation (the first person who logs in on a particular day will be prompted if they would like to download the new schema)
- Never



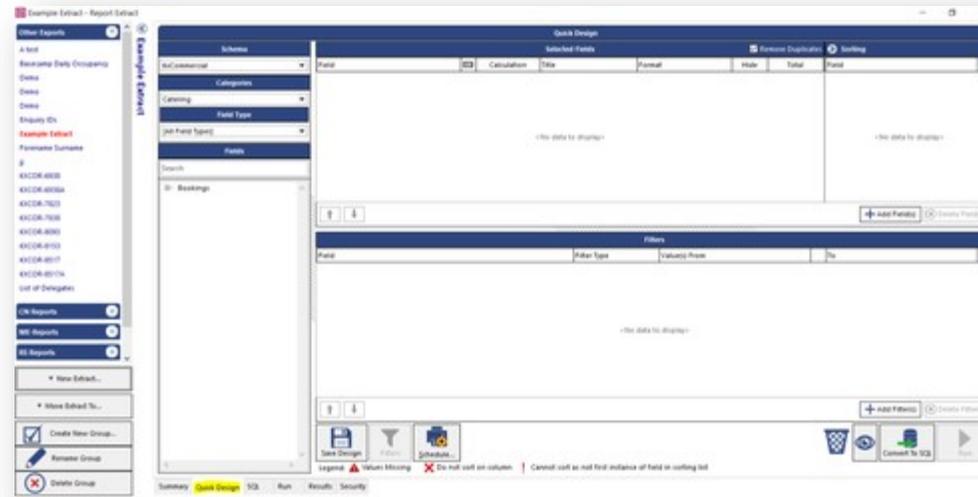
A short run through of the functionality can be seen in the video below



Extracts and Reports can be created using the Quick Design in KxPlorer. Click "New Extract" and select "Blank" Extract to create a completely new extract, or modify an existing one.



Select the "Quick Design" tab to access the Quick Designer



Fields

The fields used can be selected from the options on the left of the screen. These fields will filter depending on preexisting fields chosen and the criteria selected (Schema, Category, Type).

One or more fields can be dragged into the selected fields used by the extract and/or those fields use to filter. Fields can be removed from an extract by dragging them to bin icon in the bottom right hand corner. You can also search through the available fields.

Schema

This determines whether the fields used should be from the Commercial or Student products.

Category

Categories further sub-divide those fields into separate categories. For example in Commercial fields the following categories are available:

- Catering
- Enquiries
- Event
- Companies
- People
- Configuration

Field Types

Field Types can be used to narrow down the fields displayed based on the type of data they contain, for example "Boolean" will limit the list of fields to only those that contain true or false values.

Selected Fields

Drag fields from the field list on the left into the Selected Fields pane to include them in the extract. The options below can then be configured on each selected field in a report.



Calculation

This enables the following calculations on a field::

- COUNT
- SUM
- AVERAGE
- MIN
- MAX

Title

Fields are given a title by default, this can be changed to a different one by editing the title in the grid.

Format

The format specifies how data will be displayed allowing time, date, currency and their numerical fields to be configured. For example a field with monetary amounts could be formatted as “£0” to only show full dollar amounts.

Hide

This determines whether a selected field displays in the returned results

Total

This determines whether a total should be displayed for a given field and what calculation should be used for that total (these are the same as provided by calculation)

Selected Fields						<input checked="" type="checkbox"/> Remove Duplicates
Field	UDF	Calculation	Title	Format	Hide	Total
Event.Details.Event ID		None ▼	Event ID		<input type="checkbox"/>	None ▼
Event.Details.Event Title		None ▼	Event Title		<input type="checkbox"/>	None ▼

Sorting

Selected fields can be used to sort the results in ascending or descending order.

Clicking on the sort icon next to a field in the sorting pane will change the sorting and fields can be rearranged to choose in which order the results should be sorted.

For example with the fields surname and date of birth you could sort people from oldest to youngest (date of birth ascending) with each age group sorted alphabetically (and last name ascending).

Sorting	
Field	A ^{bc} ↑
People.Details.Date of Birth	↑
People.Details.Surname	↑
People.Details.Created On	×
People.Details.Created By	×
People.Details.Mobile	×
People.Details.Email	×
People.Details.Full Name	×

Filters

Filters are used to narrow down the results returned. These filters can be based on selected fields or other related fields.

Filters			
Field	Filter Type	Value(s) From	To
Event.Delegates.Room on First Night	NOT LIKE		
Event.Details.Is Bed & Breakfast	=	True	

Filter Type

The following filter types are available.

Filter Type	Purpose
=	Returns results where the filtered field is equal to the Value(s) From
<>	Returns results where the filtered field is NOT equal to the Value(s) From
>	Returns results where the filtered field is more than the Value(s) From
>=	Returns results where the filtered field is more than or equal to the Value(s) From
<	Returns results where the filtered field is less than the Value(s) From
<=	Returns results where the filtered field is less than or equal to the Value(s) From
LIKE	Returns results where the filtered field is like the Value(s) From
NOT LIKE	Returns results where the filtered field is not like the Value(s) From
BEGINS	Returns results where the filtered field Begins with the Value(s) From
CONTAINS	Returns results where the filtered field contains the Value(s) From
ENDS	Returns results where the filtered field Ends with the Value(s) From
BETWEEN	Returns results where the filtered field is Between the Value(s) From and To
IS NULL	Returns results where the filtered field is null (empty)
IS NOT NULL	Returns results where the filtered field is NOT null (empty)

Values

These are the values used for a given filter, they may be drawn from another field (drag that field into the value box) or entered manually.

Results

Running an extract will produce results, these can then be exported and/or configured to create reports as well as used for charts.

Results							
Here are the results of your extract. You can export, print or mailshot the results using the buttons below.							
Drag a column header here to group by that column							
Event ID	Full Name	B&B Booking Total (Gross)	Reservation Code	Rate Selection	Departure Date	Item Description	Room on First Night
20177	Tom Fisher	£92.00	Leisure	Bed & Breakfast- Premium	28/02/2019 10:00	Dinner, Bed & Breakfast	LSM02
20178	Pauline Clark	£31.00	Leisure	Bed & Breakfast	28/02/2019 10:00	Dinner, Bed & Breakfast	BT002
20179	Peter Day	£70.00	Room Only	Room Only	28/02/2019 10:00	Bed & Breakfast Rate	BT001
20192	becky sear	£9901.30		24 Hour Rate - Premium	28/02/2019 17:00	24 Hour Rate - Premium	GB249
20192	becky sear	£9901.30		Full Day Hire	28/02/2019 17:00	Full Day Hire	GB249
20192	becky sear	£9901.30		Full English Breakfast	28/02/2019 17:00	Full English Breakfast	GB249
20192	diane lowly	£9901.30		24 Hour Rate - Premium	28/02/2019 17:00	24 Hour Rate - Premium	GB233
20192	diane lowly	£9901.30		Full Day Hire	28/02/2019 17:00	Full Day Hire	GB233
20192	diane lowly	£9901.30		Full English Breakfast	28/02/2019 17:00	Full English Breakfast	GB233
20192	james love	£9901.30		24 Hour Rate - Premium	28/02/2019 17:00	24 Hour Rate - Premium	GB237
20192	james love	£9901.30		Full Day Hire	28/02/2019 17:00	Full Day Hire	GB237
20192	james love	£9901.30		Full English Breakfast	28/02/2019 17:00	Full English Breakfast	GB237
20192	mike robinson	£9901.30		24 Hour Rate - Premium	28/02/2019 17:00	24 Hour Rate - Premium	GB241
20192	mike robinson	£9901.30		Full Day Hire	28/02/2019 17:00	Full Day Hire	GB241
20192	mike robinson	£9901.30		Full English Breakfast	28/02/2019 17:00	Full English Breakfast	GB241
20192	pauline clark	£9901.30		24 Hour Rate - Premium	28/02/2019 17:00	24 Hour Rate - Premium	GB235
20192	pauline clark	£9901.30		Full Day Hire	28/02/2019 17:00	Full Day Hire	GB235
20192	pauline clark	£9901.30		Full English Breakfast	28/02/2019 17:00	Full English Breakfast	GB235
20192	sharn sumner	£9901.30		24 Hour Rate - Premium	28/02/2019 17:00	24 Hour Rate - Premium	GB239
20192	sharn sumner	£9901.30		Full Day Hire	28/02/2019 17:00	Full Day Hire	GB239
20192	sharn sumner	£9901.30		Full English Breakfast	28/02/2019 17:00	Full English Breakfast	GB239
20192	tom fish	£9901.30		24 Hour Rate - Premium	28/02/2019 17:00	24 Hour Rate - Premium	GB245
20192	tom fish	£9901.30		Full Day Hire	28/02/2019 17:00	Full Day Hire	GB245
20192	tom fish	£9901.30		Full English Breakfast	28/02/2019 17:00	Full English Breakfast	GB245
20192	tony carter	£9901.30		24 Hour Rate - Premium	28/02/2019 17:00	24 Hour Rate - Premium	GB133
20192	tony carter	£9901.30		Full Day Hire	28/02/2019 17:00	Full Day Hire	GB133
20192	tony carter	£9901.30		Full English Breakfast	28/02/2019 17:00	Full English Breakfast	GB133

Grouping

Dragging a column heading from the results to the top part of the screen will group the results by that column, such grouping can be stacked with multiple columns grouping under one another.



Pivots and Charts

Clicking Pivot on an extract for which results have been created allows the user to create a data pivot and a variety of charts. Chart type (e.g. pie chart) can be chosen with the diagram button next to the “customize Chart” button. Customize chart allows elements such as legends and series to be configured.

	Advert	Brochure	Repeat Business	Web	Word of Mouth	Grand Total
11/12/2014	1	2	2	2	3	10
12/12/2014			1	1	2	4
Grand Total	1	2	3	3	5	14

8 rows retrieved in 0.0 second(s)

Buttons: Export, Edit Report, Print Report, Mailshot, Grid

Navigation: Summary, Quick Design, Results, Security