

Ad-hoc Designer Manual

List & Label[®] 25

Full-Powered Reporting Functionality

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1. Introduction

The Ad-hoc Designer is a completely browser-based application (HTML and JavaScript) that allows you to design basic reports like simple tables or charts very quickly. It offers only the most important features of the full List & Label Designer, but does not require an installation on the client computer like the Web Designer does. Furthermore, it provides a simplified user interface that can be used on any modern device, operating system and browser.

The Ad-hoc Designer is not a replacement for the List & Label Designer or the Web Designer.

2. Creating Reports

The projects of the Ad-hoc Designer are saved in a special file format. A project file that has been designed with the Ad-hoc Designer can be used like a regular List & Label project for exporting or printing it. You can also open it in the List & Label Designer to customize the more advanced properties; however, a project that has been created or modified with the List & Label Designer cannot be loaded in the Ad-hoc Designer.

2.1 Simple Table

- First, choose the base table whose data is to be exported.

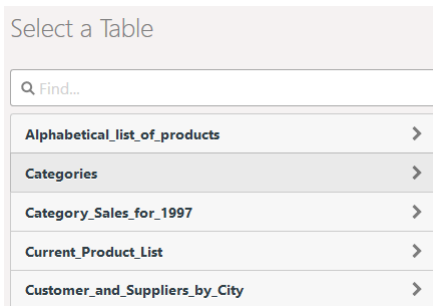


Figure 2.1: Selecting the base table

- First, choose the table columns by clicking "Add Columns".
 - Click on the plus symbol to select a column. To delete a selected column, click on the minus symbol.
 - To return to the overview, click on the arrow at the upper left.
 - You can change the order of the columns by dragging the double arrow symbol.
 - Click on "Position Columns" to define the column width.

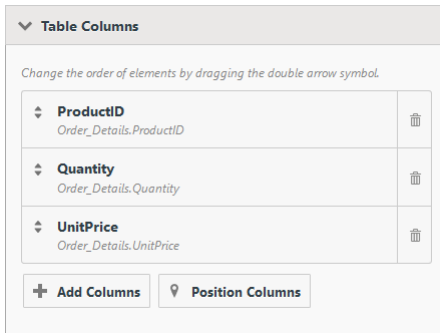


Figure 2.2: Selecting columns

- When you click on a column, you can edit the column properties and add a footer:
 - Specify the title in the header

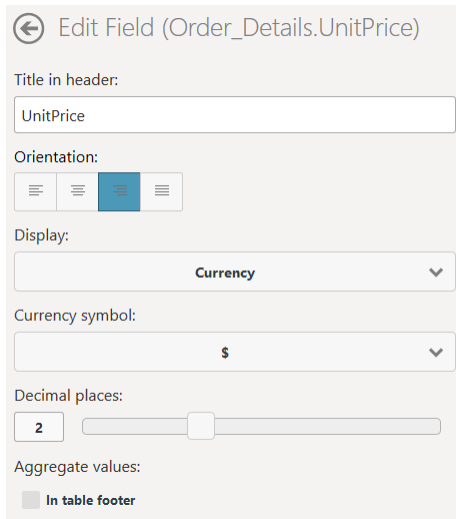


Figure 2.3: Properties of a numeric column

- Align left, centered, align right, justified
- Display: Numeric (with choice of decimal places), currency (with choice of currency symbol), percent (with choice of decimal places).
- Aggregate values:
 - With numeric columns, you can activate a footer using the "In table footer" option. This calculates the aggregate value for the column as defined in the option box. You can choose from Average, Count, Maximum, Median, Minimum, Standard Deviation, Sum, and Variance.

- If the data is to be grouped together for output (see "Sorting and Grouping" below), a group footer can be activated using the "In Group Footer" option. Here, you can also choose from Average, Count, Maximum, Median, Minimum, Standard Deviation, Sum and Variance to aggregate the numerical values.
- You can define the appearance of the report in the "Layout" section:
 - Design scheme: choose a predefined design scheme
 - Row coloring: Activate zebra pattern
 - Paper size: Choose output format
 - Orientation: Portrait or Landscape
 - Print Date Position: Do not Show/Use default/Bottom left/bottom centric/Bottom right and the ability to select the date format.
 - Page numbering position: Do not Show/Use default/Bottom left/bottom centric/Bottom right and the possibility to select the page numbering format.

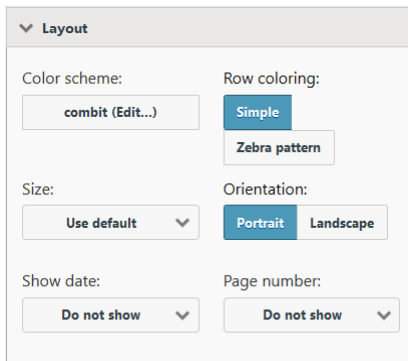


Figure 2.4: Layout definition

- In the "Sorting and Grouping" section, you can now choose the field according to which the records are to be grouped for display. When you define a grouping, a sorting scheme is automatically created based on this field. If you do not apply grouping, you can create additional (sub-)sorting schemes or create a sorting scheme. With grouped data, it is also possible to include group footers (see "Aggregate values" above)
- Under "Filters", you specify which columns will be available for filtering during exports.
 - The selected column is added as a report parameter. For more information, refer to "Report Parameters" in the section "Advanced Functions" in the Designer-Manual.

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- Click of an entry to configure a filter definition:
 - Label of input field
 - For date fields:
 - Exact date, Define value range (from/to)
 - Select year/month/quarter
 - Numerical fields:
 - Allow no value (NULL)
 - Input type: Select from existing values (multiple selection), Select from existing values (single selection), Manual input, Define value range (from/to)
 - For character fields:
 - Allow empty value
 - Input type: Select from existing values (multiple selection), Select from existing values (single selection), Manual input
- Save the changes at the top right and start the preview.

2.2 Simple Chart

- First, choose the table from which data is to be exported.
- Click on the arrow at the top right, choose the chart type and then choose a sub-type:
 - Lines/Symbols: Simple, Consecutively, Stacked, Relative to each other
 - Areas: Simple, Stacked, Relative to each other
 - Bars: Simple (also 3D), Tiled (also 3D), Consecutively (3D), Stacked (also 3D), Relative to each other (also 3D)
 - Circle/Ring: Circle (also 3D), Ring (also 3D)
 - Radar/Web: Simple, Consecutively, Stacked, Relative to each other
 - Treemap: Simple, With sub-groups
 - Funnel: Vertical, Horizontal
- General
 - Specify a title for the chart
 - Base table: when you change the base table, the diagram is recreated.
- Horizontal Axis (X) (Lines/Areas/Bars), Segmentation (Circle/Ring/Funnel), Category assignment (Radar), separation in areas (Treemap):
 - Lines, areas, bars: Select the column for the x-coordinate.

- Circle/Ring/Funnel: Select the column for the segment.
 - Radar: Select the column for the circle segment.
 - Treemap: Select the column for the area.
 - The values can be grouped.
 - Lines, areas, bars: Labeling of the x-axis
- Only Lines simple/Areas Simple/Bars Simple/Treemap: Vertical Axis (Y)
- Lines, Areas, Bars: Select the column for the height of the line
 - Treemap: Select the column for the size of the subarea
 - Determine whether the number of all values or the number of unique values is to be used.
 - Labeling Y-Axis
- Only Lines, Areas, Bars (each without Simple), Radar: data series (Y/Z-axis)
- One bar will be shown per data series and x-coordinate. Define how the records will be assigned to the respective series.

▼ Data series (Y/Z axis)

One bar will be shown per data series and x-coordinate. Define how the records will be assigned to the respective series:

Define data series by the value of a particular column

Data series is defined by:

OrderID ▼

Calculate the line height by:

OrderID ▼

Use for multiple values per X-coordinate:

the sum ▼

Every data series corresponds to a particular column

Figure 2.5: Defining data series

- Define data series by the value of a particular column:
 - Specify the column of the data series
 - Specify the column for the line height of the data series
 - Specify how multiple values are to be aggregated, e.g., count or sum
 - Each data series corresponds to a particular column: To add columns to the data series, click on "Add Columns".
- Only Circle/Ring/Funnel: Size of Segments

- Select the column for calculating the (relative) segment size.

Size of Segments

Calculate percentage of segment by:

UnitPrice

Use for multiple values per segment:

the sum

Minimum percentage (%):

5

Space between segments (%):

10

Segment legend:

Percentage Absolute value

Figure 2.6: Size of segments

- Specify how multiple values are to be aggregated, e.g., quantity or sum.
 - Minimum percentage (%): Especially if you have many values with a small percentage, it might be helpful to combine these in an "Other" segment. You can select a threshold value here at which point the various segments are combined into a larger one.
 - Space between segments (%): The various segments are clearly delineated. This value is the segment spacing as a percentage of the radius.
 - Segment legend with percentages or absolute values.
- You can change the appearance of the report in the "Layout" section:
- Design scheme: choose a predefined design scheme
 - Size: Choose output format
 - Orientation: Portrait or Landscape
 - Only Ring/Circle: Ring/Circle chart type and flat/3D display mode
 - Only Radar: Display values on axis or at data points
- Under "Filters", you specify which columns will be available for filtering during exports.
- The selected column is added as a report parameter. For more information, refer to "Report Parameters" in the section "Advanced Functions" in the Designer-Manual.
 - Click of an entry to configure a filter definition:
 - Label of input field
 - For date fields:

- Exact date, Define value range (from/to)
 - Select year/month/quarter
 - Numerical fields:
 - Allow no value (NULL)
 - Input type: Select from existing values (multiple selection), Select from existing values (single selection), Manual input, Define value range (from/to)
 - For character fields:
 - Allow empty value
 - Input type: Select from existing values (multiple selection), Select from existing values (single selection), Manual input
- Save the changes at the top right and start the preview.
- At the bottom right you can activate the option "Instantly refresh preview when changes are made" via the gear-button. This updates the preview image immediately after changing a setting.
 - Using the additional option "Limit data volume for faster preview display", you can limit the number of data records that are taken into account for printing the preview. This is particularly useful if the "Instantly refresh preview when changes are made" option is activated. At a limit of 5, for example, only the first 5 categories are considered, the first 5 products for each category, the first 5 orders for each product, and so on.