

New Feature Description Analytic Reporting Tool PRO

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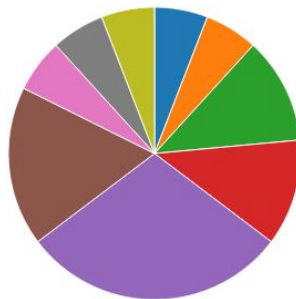
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Last updated: August 14, 2017

GENERATE PDF OUTPUT DIRECTLY FROM YOUR FORMATTED EXCEL

In case you need to add logos, specific colors and/or formulas to your report, you can define those in the Excel template and then add them to your report in the 'Templates' tab. (For detailed instruction please see the User Manual <https://itsapiens.eu/public/file/solution/art-sugarcrm/User Manual Analytic Reporting PRO for SugarCRM.pdf?v=2> section 'Adding your own Excel templates')

You can now generate your report in PDF format directly from a formatted excel template. Same applies to scheduled reports sent via e-mail. If you have selected a PDF attachment to be scheduled via e-mail and this report has an Excel template, the PDF will be e-mailed already from the formatted Excel template.

Save Save As Delete Back to reports Export as PDF Export as PDF from XLS Export as .xlsx Export as .xlsx with Headers

Notes Report :

^ Report Editor

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

Select Excel template:

2017_07_05_Template.xlsx

Hide worksheets:

Worksheet (2)

Worksheet **This worksheet will not be shown in PDF or Excel output file**

Current

Row	Column	Sheet
6	0	2

Remove

Add report

We have also added the option to hide Excel worksheets from the template, in order to not generate them in PDF or Excel output. This is sometimes needed when you have raw data in some Excel worksheets, which you want to hide in order to print only the formatted Worksheet which has references to the hidden ones.

GRAND TOTALS ARE ADDED IN CASE DATA ARE SPLIT ACROSS SEVERAL PAGES

Until now if data was split across several pages only the page total was visible. Now the total for all data is added and visible on each page, starting from page one. As you can see in the example below, page total has counted 10 opportunities on the first page as 'Page Total', while 'Grand Total' has counted all 20 opportunities in this report:

[Report](#)
 Page No: 1 2 Show records per page Freeze first columns

Industry:	Opportunity Name:	Date Created	Assigned User:	Type:
Apparel (2)	2			
Apparel	Marrero	08-04-2016 15:47:30	Polzin Buchholtz	Existing Business
Apparel	Rehm	08-04-2016 15:47:30	Polzin Buchholtz	
Entertainment (4)	4			
Entertainment	Durante	08-04-2016 15:47:30	Polzin Buchholtz	
Entertainment	Stiffler	08-04-2016 15:47:30	Polzin Buchholtz	Existing Business
Entertainment	Beeman	08-04-2016 15:47:30	Polzin Buchholtz	Existing Business
Entertainment	Riehle	08-04-2016 15:47:30	Polzin Buchholtz	
Insurance (2)	2			
Insurance	Yarbro	08-04-2016 15:47:30	Polzin Buchholtz	New Business
Insurance	Tobin	08-04-2016 15:47:30	Polzin Buchholtz	New Business
Retail (2)	2			
Retail	Denny	08-04-2016 15:47:30	Polzin Buchholtz	Existing Business
Retail	Wada	08-04-2016 15:47:30	Polzin Buchholtz	Existing Business
Page Total	10			
Grand Total	20			

Page No: 1 2 Show records per page

Small remark: you should remember to select 'Grand Total' to be shown in the report under 'Grouping & Sorting' tab in order to see Page Total and Grand Total.

[Report Editor](#)
 Filters Fields Calculated fields Aggregate **Grouping & Sorting** Rename Labels Templates Sharing & Scheduling

Include details (2) Pivot (Matrix) (2)

Level	Action	Group by	Sort
1	Group & Sort ▼	(Accounts) Industry: ▼	Industry: ▼ Ascending ▼ Show Top 0

Select summaries to show in this report:

Group	Count(Opportunity Name:)
Industry:	<input checked="" type="checkbox"/>
Grand Total	<input checked="" type="checkbox"/>

CALCULATE % FROM TOTAL

It is now possible to calculate % from total, if you have detailed or summary report with Groups and Aggregates.

You should have at least one aggregate selected under 'Aggregates' tab and at least one Group added under 'Grouping & Sorting' tab, with action identified either as 'Group & Sort' or 'Group'. (If the 'Action' is set to 'Sort', there will be no option for % calculation).

Now under 'Grouping & Sorting' tab in the lower table of settings 'Select summaries to show in this report:' you should select the checkbox for the necessary Aggregate, which you want to calculate % for and then in the drop-down you should select '% from total'.

Important! Please note that Grand Total also must be selected, since we need to know it in order to be able to calculate %.

27. Opp. Created to Opp Won Conversion Quarterly

[^ Report Editor](#)

Filters Fields Calculated fields Aggregate Grouping & Sorting Rename Labels Templates Sharing & S

Include details Pivot (Matrix) Aggregates as column Empty values as 0 **Should NOT be selected**

Level	Action	Group by	Sort	Position	
1	Group	(Opportunities) Date Created Quarter with year		Column	✗
2	Group	Conversion Status Group by range		Column	✗

+

Select summaries to show in this report:

Group	Count(ID)
Date Created (QuarterAndYear)	<input checked="" type="checkbox"/> Select options
Conversion Status	<input checked="" type="checkbox"/> % from total
Grand Total <input type="checkbox"/> On both sides	<input checked="" type="checkbox"/>

Select '% from total'

Calculations

% from total

Preview

[^ Report](#)

2017-3 Converted #	2017-3 Converted #% from total	2	erted #% from total
4	2.67%	140	37.50%

On 'Preview' or after report 'Save' with the new settings you will see a new column showing the calculated %.

% Calculations are available in Detailed, Simple Summary and Pivot (Matrix) report types.

Currently this functionality does not support 'Aggregates as column', which means that this checkbox should stay unchecked.

DISABLING PERMISSIONS FOR PDF AND EXCEL EXPORT FOR READ-ONLY USERS

You can now disable the permissions for PDF and Excel Export for users who have report 'View' permissions. This can be done under the 'Sharing & Scheduling' tab. You need to uncheck the "Allow Export for read only users" checkbox.

This will apply only to those users who have their permissions set as 'View'. If a user has permissions to edit the report, they will still be able to Export the report in PDF or Excel format.

Campaigns by Campaign Type Detailed Report

Report Editor

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

Sharing

Update Permissions Allow Drilldown for read only users Allow Export for read only users

Owner: EvaAdministrator Public Everyone Can Edit and Delete

Scheduling

Schedule Report

Report

Show 10 records per page Freeze first 0 columns

Type:	Name:	Date Created	Start Date:	End Date:	Expected Cost:	Actual Cost:	Expected Revenue:
Telesales (2)	2						
Telesales	Telesales Campaign b	17-06-2015 21:21:47	15-04-2015	22-04-2015	45,000.00	20,000.00	60,000.00
Telesales	Telesales Campaign A	14-04-2015 21:07:41	15-04-2015	22-04-2016	45,000.00	40,000.00	60,000.00
Web (1)	1						
Web	Web Campaign B	14-04-2015 21:08:18	10-03-2015	31-03-2015	45,000.00	40,000.00	60,000.00
Radio (1)	1						
Radio	Radio Ad C	14-04-2015 21:18:56	06-05-2015	15-05-2015	35,000.00	25,000.00	50,000.00

Show 10 records per page

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

PREVIOUS UPDATES

If you have missed the previous updates, you will learn more about them by reading these documents:

http://itsapiens.eu/public/updates/NewFeatures_AnalyticReportingPRO_2017_June15.pdf

It covers:

- Identify your own ranges for report summaries
- Search added for user/group selection on sharing & scheduling

It covers:

- SNAPSHOT reporting from audit history
- Detailed info on top first/last or min/max grouped items
- Added cities to Geographic Chart
- Count of unique values

http://www.bisapiens.com/public/file/news/2016/NewFeatures_AnalyticReportingPRO_Sept_2016.pdf

It covers:

- ADDING YOUR OWN EXCEL TEMPLATES
- NEW CHART TYPE: AREA CHART
- HORIZONTAL BAR CHART
- ADDITIONAL FILTERS: TEAM, # OF PASSED WEEKS, MONTHS, QUARTERS
- PERMISSIONS TO EDIT SELECTED FILTERS FOR READ-ONLY USERS
- CALCULATED FUNCTION MANUAL EDITING & OTHER IMPROVEMENTS
- ADDITIONAL MODULE ADDING TO ALREADY CREATED REPORTS
- ADDING DATA FROM SUGAR HISTORY AUDIT TO YOUR REPORT