Creating reports

This article is a detailed guide on report generation in the Verba Recording System.

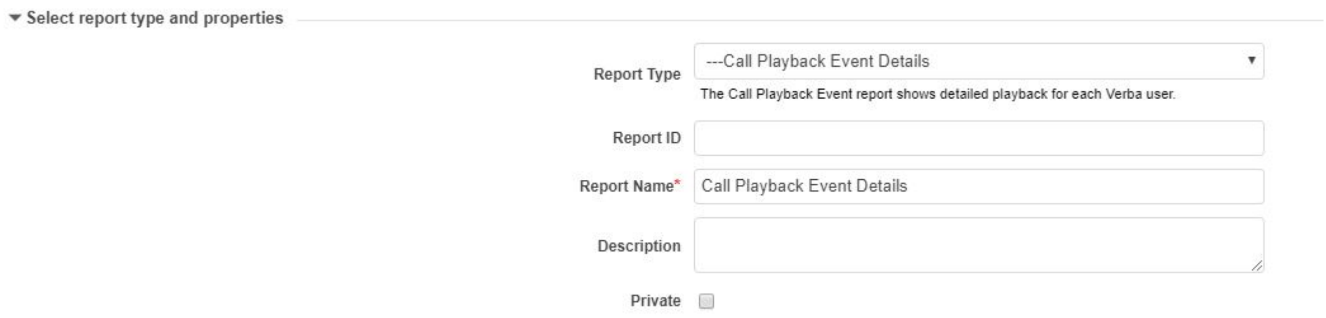
There is only one essential step: **Select Report Type**. Once a report type is selected, the user can start report generation. However, there are several ways to customize the report generation process.

Select report type

The first step of the report generation process is the report type selection. You can find the available report templates in the drop-down list.

You can customize the report settings by using the following configuration options, available under the **Select report type and properties** section of the **Report Generation** screen:

Name	Function
Report Name	Defines a custom name for the report template to save on.
Description	Allows you to add a short custom description to the report template.
Private	Sets the Private attribute of the report template. This option allows the users to save the settings only for themselves. Otherwise, every user with the Reporting right is allowed to see the saved report template.



Configure Scheduling

Scheduling can be set up by choosing from three Scheduling Type options found under the **Scheduling** section of the **Report Generation** scr een:

- **Generate report now:** allows instant report generation. The report is generated when the user clicks on the Create button on the bottom of the Report Generation page.
- **Generate report once at...:** provides a way to schedule the report for a "one-time-only" run. The date and time can be set with the date picker.
- **Generate report periodically:** allows recurring report generation. You can set how often you would like to generate reports (daily / monthly/annual) and specify when the reports should be created during the day.

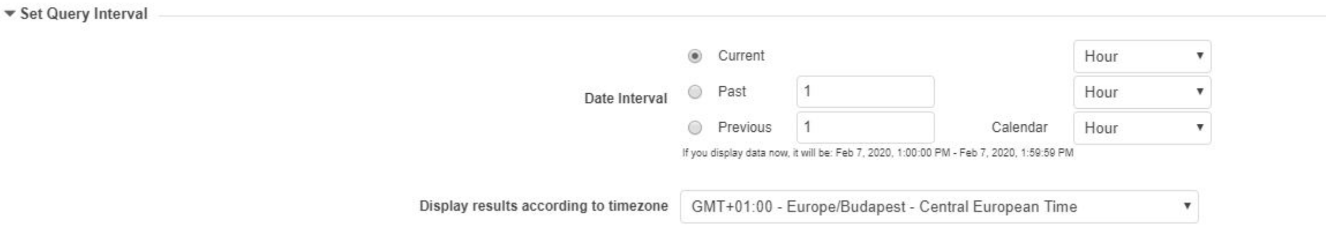
Set query interval

In the **Set Query Interval** section of the **Report Generation** screen, you have to choose the timeframe, which you want to apply in the report. The following query interval options are available:

- **Current:** This option lets you select the entire current (momentary) hour, day, week, month, quarter, or year for the query interval. The system dynamically calculates the current date and time, every time the widget is displayed.
  E.g., the current week on Tuesday at 10:15 AM will correspond to a date and time interval between Monday 00:00 AM and Sunday 11:59 PM.

- **Last:** This option lets you select the entire previous hour, day, week, month, quarter, or year for the query interval.
  The system dynamically calculates the last date and time, every time the widget is displayed.
  E.g., last week on Tuesday at 10:15 AM will correspond to a date and time interval between Tuesday 10:15 AM on the week before and Tuesday 10:15 AM (momentary time).
- **Previous:** This option lets you select the entire past calendar hour, day, week, month, quarter, or year for the query interval.
  The system dynamically calculates the previous date and time, every time the widget is displayed.
  E.g., the previous week on Tuesday at 10:15 AM will correspond to a date and time interval between Monday 00:00 AM on the week before and Sunday 11:59 PM on the week before.
- **Fixed Date Interval:** This option allows you to use the date picker to specify a custom time interval on which you want the report generated.

The '**Display results according to time zone**' drop-down list allows you to select the desired time zone. Please note that this setting will **impact both the report generation scheduling (if any) and the query interval dates** set in the previous sections.



Set filtering criteria

In the **Set Filtering Criteria And Report Configuration** section of the **Report Generation** screen, you can apply additional filtering criteria. This allows you to use rich filtering criteria, enabling you to create highly customized reports.

If you have multiple filters, then the logic between them is **and**. Should you want to add, for example, multiple users, you would have to use the **Matches a value in the list** operator instead of adding them one by one with an **Equal** operator.

Report specific settings

Every report template can contain specific filtering fields. The filtering options are discussed in every report type's datasheet in the Reporting Guide.

Select display and export options

In the last section of the **Report Generation** screen, under **Select Display and Export Options**, you can select the target of the generated report. Verba Recording System's Reporting component supports the creation of reports in various file formats.

The following table contains detailed information on supported display and export options:

Display and Export options	Description
PDF	PDF is optimized for saving the report into a file and for printing. This displaying method uses rich report layout design.
Encrypted PDF	Encrypted PDF provides 128-bit encryption for PDF file, a valid username and password are required to open the document. PDF is optimized for saving the report into a file and for printing. This displaying method uses rich report layout design.
RTF	RTF is optimized for later editing of the report in MS Word. This displaying method uses rich report layout design.
XLS	XLS is optimized for later editing of the report in MS Excel. This displaying method uses a simplified report layout design.
XLSX	XLSX is one of the Office Open XML file formats introduced in Excel 2007 and provides a way to store the spreadsheets in a zipped, XML-based file format. This displaying method uses a simplified report layout design.
DOCX	DOCX is Word 2007's Office Open XML format for storing word

	processing documents. This displaying method uses rich report layout design.
ODT	ODT (OpenDocument Text) is an XML based file format for representing word processing documents. This displaying method uses rich report layout design.
ODS	ODS (OpenDocument Spreadsheet) is an XML based file format for representing spreadsheets. This displaying method uses a simple report layout design.
PPTX	PPTX is PowerPoint 2007's (or later) presentation storing method, using an XML based Office Open XML file format. This displaying method uses rich report layout design.
CSV	CSV (Comma Separated Values) is optimized for text file based report export. This displaying method uses a simplified report layout design.
TXT	TXT (text) is optimized for text file based report export. This displaying method uses a simplified report layout design.
XML	XML is optimized for further usage of the report. This displaying method uses a simplified report layout design.

Configure automatic report delivery by email

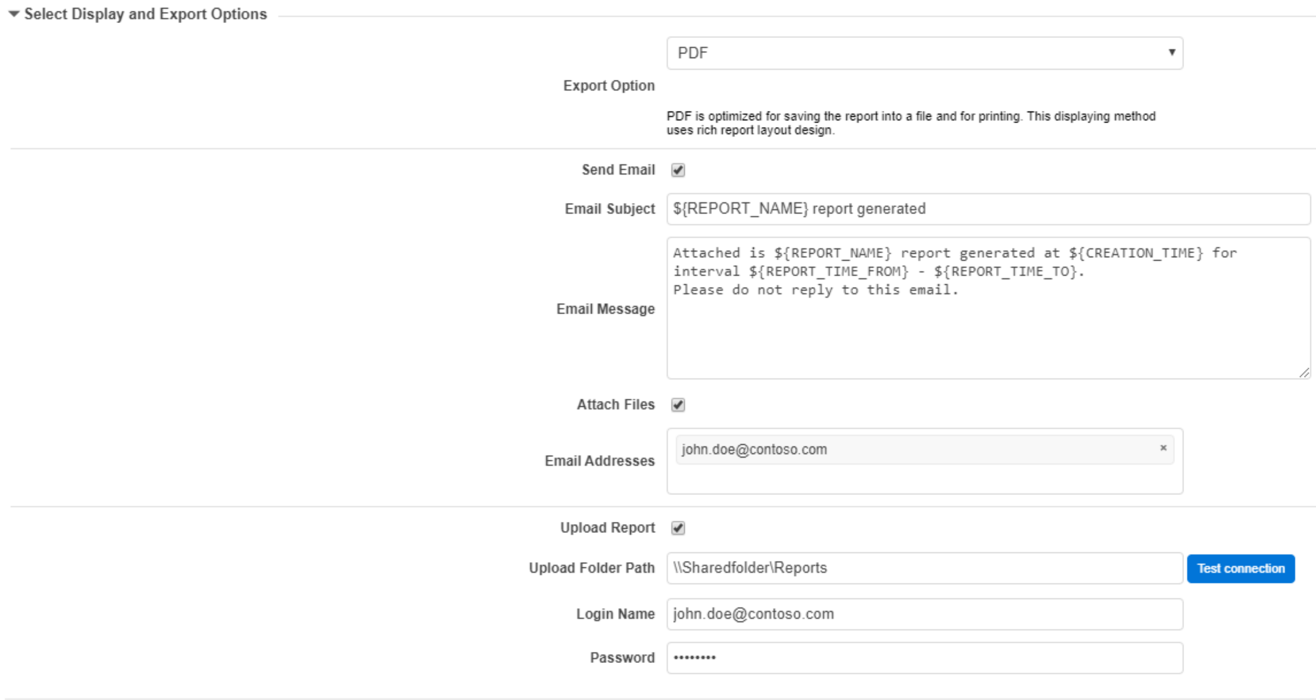
The **Display group logo in report** option provides you the opportunity to display your individual group logos on the top of the generated report document.

The **Send generated files by email** option enable you to send the generated reports as an email attachment automatically. The subject and body fields of the email are customizable.

Upload Report

By selecting the **Upload Report** option, you can specify a folder where the generated report gets automatically uploaded. The connection and the credentials can be tested by click on the **Test connection** button.

Configuration Parameter Name	Description
Upload Folder Path	The folder where the reports will be saved. Both local and shared network locations are supported
Login Name	In the case of shared folders, please provide a username and password that has proper access to the selected Upload Folder
Password	In the case of shared folders, please provide a username and password that has proper access to the selected Upload Folder



Access generated reports

You can initiate the report generation procedure at the bottom of the **Report Generation** screen with the **Create** or **Schedule** button, depending on the **Scheduling** settings.

Once you click the Create / Schedule button, and the report generation configuration is done, the system automatically displays the **Schedule d reports** screen, to show all the reports that are scheduled for the future generation or are currently processed.

When a report is currently being processed, the system indicates the report generation process with a spinner in the name column of the report in the table.

Once the report generation is finished, a file icon, according to the user's export option selection is displayed in the download column.

When you click on the report's **row**, the **Generated Files** popup window is displayed, showing the file information for the corresponding report, and the actions for each file which are **Download** and **Delete**.

Single file download is also possible, by clicking on the **file icon** in the **Actions** column, but when multiple files are present for the report, the system automatically displays the popup window with multiple download links.

You can also create a report template quite easily by using the **Save** button on the **Report Generation** screen. The report template gets saved with all effective configuration options and values. You can use the report templates to quickly re-run a report that would usually require more time to reconfigure again. You can find all the saved report templates under **Reporting / Saved Templates**.