Introduction.

Ad Hoc Reporting is a tool provided with MAXIMO 7.x that allows the user to create customized basic reports in SAMMS utilizing and querying from almost all available fields.

The possibilities of Ad Hoc reporting are limitless; however, this guide will only assist the user in creating Summary type reports.

The intent of this guide is to help the user learn how to:

a. Understand the basic steps and parts of the Create Report control;
b. Make a report locked to a specific set of records, or for any generalized search;
c. Add or remove fields to the base report;
d. Reorder the fields;
e. Change the label or column headers;
f. Filter, group and sort records;
g. Schedule the report (one time or on a recurring basis);
h. Find additional guidance and tips on the covered topics;
i. Export reports and/or data...there is a difference!

Before we begin.

To get started creating an Ad Hoc report, two questions need to be asked; answering these two questions initially will determine some of the choices that are made when designing Ad Hoc reports.

1. Is this for a limited set of users, or is it for all users; and
2. Is this a report that can be run against any search results, or is it for a specific set of records all of the time?

*Bear in mind, this training guide will NOT answer all of your questions; however, by experimenting and making use of the online help you can achieve most of your reporting needs. Subsequently, if further assistance is needed you can reach out to your enterprise report writers for assistance in:

a. Updating reports to provide additional information;
b. Creating reports with charts and graphs; and
c. Summarizing certain data (costs, measurements, counts, or grouping records to one or more criteria).

*Note: you can also group and sort with Ad Hoc reporting.

Getting Started—Creating an Ad Hoc Report

1. Log into SAMMS
2. Select Locations in the Favorite Applications section; if Locations is not listed as one of your favorite applications...
   a. Choose Go To drop down at top of page, choose Assets, then Locations.

*Different routes, but both get you to the same place...see screen shot below.
b. Click on **Advanced Search** query and on the drop down choose **More Search Fields**.

3. **More Search Fields/Current Query** window opens; enter 43581 in the **Orgcode** field (or use the search tool to find it). Click **OK**.

4. This will return the **More Search Fields/Current Query** page with **Orgcode** filled out with =43581. Records can be narrowed down by selecting one or more asset types (e.g. buildings or roads). In this case, we want all records that are operational (or almost); the application defaults to those values **and** to records that are just real property records (*see **Status=Operational,*
=Not Ready & Type=RPI, FBMSINS for values that are automatically filled in by default). Click FIND.

5. Records appear, and now we can create a report.

6. Click on the Select Action drop down at the top of screen and select Run Reports.

7. Reports window opens, click on Create Report.
8. **Query Based Report** window opens:

   a. Enter a description of the report in **Report Title** field—*Panther Swamp CRV-API*; the actual report name is not seen here, but you can change the report description later on.
   
   b. Do not make the report **Public** (if that option is not grayed out or disabled).
   
   c. The boxes **Close window** and **Save Report** should have been checked for you already, if not check each box. (Don’t submit just yet!)

9. Now click on the **Select** tab.

   a. What’s the purpose of the report, is it a generic report for any search, or is it always for the same set of records? If the latter, then you will not even have to go into the application to run the report, it can be done from any screen in SAMMS. For the purpose of this user guide, you will make this a generic report. At the top right is a check box, with the label **Apply the Current Query and Filter from the Application**. Uncheck
the box. Now you can use this report against anything you should search for in the future.

10. Now we will begin to build the custom report. If you notice, there are already a number of fields pre-selected (Selected Fields); this list is based on the fields seen on the List tab. Now we will add and remove certain fields. Note: one of the things to keep in mind about your design is if it will be a general type of report, that is, for any of your searches. Therefore, remember that for some records, it will be logical for some fields to have values, but not on other types of records (e.g. a station record will not have values for FCI, API, or replace cost). If you look on the upper left window, you will see a tree structure. This is called the Report Object Structure (ROS). It lists tables that are linked to the Locations table (in our example). For us, we have several custom tables, which the administrator has to add to the ROS.

   *Note: if the structure is changed, (e.g., add or remove or change tables), your Ad Hoc report may be fixed, therefore it cannot be edited. At that point, the report writers will have to export that, and fix it for you, or else you get to re-create the report.

11. One of the fields you will see is Asset Code, but what is that code describing? We will add the description for that field as the value comes from a different table.
a. Scroll down the tree in the ROS window and click the blue square next to **Asset Codes**. Notice that the list of **Available Fields** now changes to show the fields from the **ASSETCODE** table. You can search by field name or the field label (as shown for the most part on the SAMMS window), or you can scroll through the list (not recommended except for the smaller tables).

b. Type **Description** in the **Field Value** section and hit enter.
12. Clicking the blue arrow on the left hand side of each available description under the Field Description sends each one to the lower Selected Fields section.
   
a. Select arrow down beside Description and Unit A description.  
b. When finished Selected Fields should look like the example. Click on the green arrow in Selected Fields section to view the next page, as current view will be 1-10 of 14.

13. Once it is in the Selected Fields section, you can do two things: change the label and change the order in which it shows up.
   
a. To change the label, click in the Report Label box, and type in a new value. For this report change Description to Asset Type.  
b. To change the order, so that it appears where you want it, change the field order to match the number you want it to appear after (or before). For this report change the Assetcode = DESCRIPTION to show up after the Asset code = ASSETCODE. The Asset Code = DESCRIPTION was no. 9, so change no. 13 value to no. 9, and press enter or tab out of the field. Refresh is clicked to make the change.
14. We will now add the size fields and the unit of measure fields. Unit of measure comes from the **ASSETCODE** table; size fields come from the **Locations** table.
   
   a. Select **RP information** from ROS field
   b. Type **size** into **Field Value** and **Enter** to get view below.
   c. Here you see the size fields; **Size1** and **Size1b** are deprecated, that is a technical term that means they are no longer used. We will be removing these and other like fields in the next version.
   d. Click on the blue arrow to push the **Size fields** (**Size A, Size B, Size C**) down to the **Select Fields** section.
15. Select **Asset Codes** from **ROS** and enter **unit** into **Field Description**. Hit **Enter**.
   a. Click on the blue arrow to push down **Unit A**, **Unit B**, and **Unit C** to **Selected Fields** section.
   b. Now see the unit of measurement fields under **Field Description** – **Unit A**, **Unit B** and **Unit C**. As before, we click the blue arrow to the left to push each down to the **Selected Fields** section.

16. Look at the example that follows to see the new field descriptions moved down. Now the **Field Order** values can be rearranged so that **Unit A** comes after **Size A** and the same for **Units B & C**.
17. The **API field** is added in a like manner, and placed in the desired order. Go to **RP information** in ROS screen and choose, then type **API** into **Field Description** and hit enter.
   
a. Select blue arrow next to **API** and send it down to **Selected Fields**.
b. Now type in **CRV** into the same **Field Description** and choose the **Value (CRV)** with Field Value **REPLACECOST** (not the first Value (CRV) with Field Value CRV).
c. You should see something like the example below when you’re done with these additions and re-ordering.
d. Once you’re done *do not* hit the **Submit** button just yet...there are other options for consideration first.
18. Click on the **Format** tab.
   a. If you click on the little box on the right corner you can expand or collapse the various sections. Click on the **Help Text** for a brief help section.
   *Reminder: more help is available from the main **Help** link on the top navigation bar.*
19. Looking at the Filtering, Grouping and Sorting sections, you have the option of performing those actions based on certain field values. The number of fields available in each section varies based on the fields in the report, both the ones on the List tab, and the ones you add. Note that you can choose to use a single value, or multiple values. You can also select up to three different fields for each section.

   a. In the Filtering section use the search tool and find Assetcode and choose to select.
   b. Filter On Category code will be filled out and should look like the example below.

20. Once you make the change, click Submit. Reports window will open. Use the green arrow to find the new Panther Swamp CRV-API report and click on it. Then enter the ASSETCODE value.
21. Before clicking the **Submit** button, note that you have the options of running the report immediately, or scheduling it to run at a specific time, or on some recurring basis.

22. In the latter case (**Recurring**), you will want to provide email information. The email address can be individuals as well as groups; you would separate the recipients with a comma if entering them manually; this would be appropriate if the user(s) or groups are not SAMMS users. You use the **Select Value** to bring up a list of users (who are listed in SAMMS).
Once you have finished your design (or redesign) of your report, click on the **Submit** button to launch the report. Depending on your browser settings, the report will open in a new window, or a new tab. After it completes, you have several options if you want to do other things, such as adding summary or resorting your information.

23. The first option is to export the report—you have four choices under export format:

   a. PDF
   b. Word
   c. Postscript (Postscript is a programming language that describes the appearance of a printed page; see link [here](#) for more information.
   d. Excel (choice for this training); choose and hit **OK**.
   e. Window similar to example will open. Select either to **Open with** or **Save File**. If you select to save the file, make sure to note the directory being saved to. Click **OK**.
   f. Data exported to Excel—formatting carries over, see example. The excel file will appear similar to the actual report. Depending on grouping, this may or may not present some additional work to reformat the file.
24. Some larger reports will take longer to export the data, so you may find a better option is the CSV (comma separated value) file, which is usually recognized as Excel.

25. With this option you can select all or just some of the columns by moving columns from the Available Columns section to the Selected Columns section by using the arrows (see example 25.a).
25. a & 25. b). By selecting all **Available Columns** your Selected Columns will end up looking like example 25. c.

![Screen capture of Ad Hoc Reporting - Introductory Guide](image)

25. c

26. Click **OK** to complete the export. You will get the option to **Open** or **Save the File**; if you select open, it should open with Excel...if you choose to save it, make note of the directory.

27. At some point you will want to change your report, to do so, click on the edit icon: ![edit icon]. This will open the window and allow you to change the fields, the order, the filtering, sorting, grouping and scheduling. However, one thing remains that you cannot change after the first save:

![Apply the Current Query and Filter from the Application?](image)

If you left this box checked, it will **always** run against your initial search results.

28. If you want to change the description of the report, see below in section **Report Title**; it has been changed to **Station Asset CRV-API** from **Panther Swamp API-CRV**. This will give you a new report, leaving the original report available as well.

![Report Title](image)
29. Now search for your report by typing the name into the **Description** field (29. a) and then click the **Edit** icon (29. b); change the report title, so that it is more generic.

30. When the report title is changed, you will be prompted with a message alert that a new report is being created...click **OK** to create the new report.