

# DSLIVE Reports

## Draft Manual

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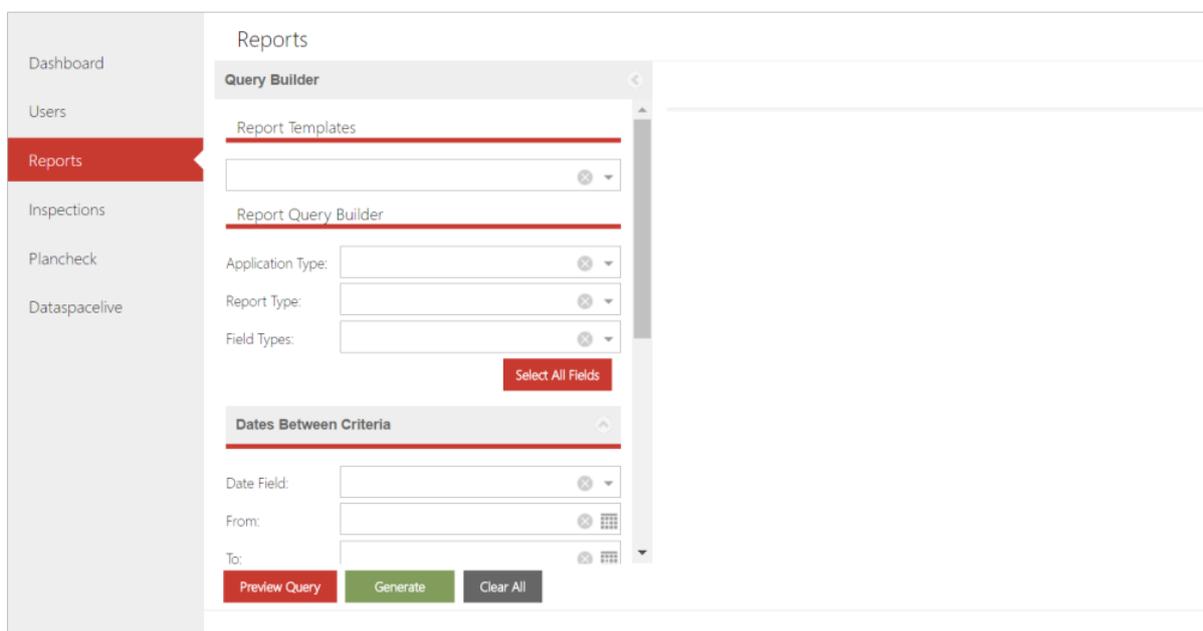
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## Introduction

**Note: This is a draft manual due to this module being a newly developed release to DSLive. This means that some of the details and processes in this guide may change.**

Here in the Admin Tool you can create reports across the applications, inspections (and eventually the plan-checking) within your authority's DSLive account. These reports can be defined by a range of different DSLive data fields and criteria.

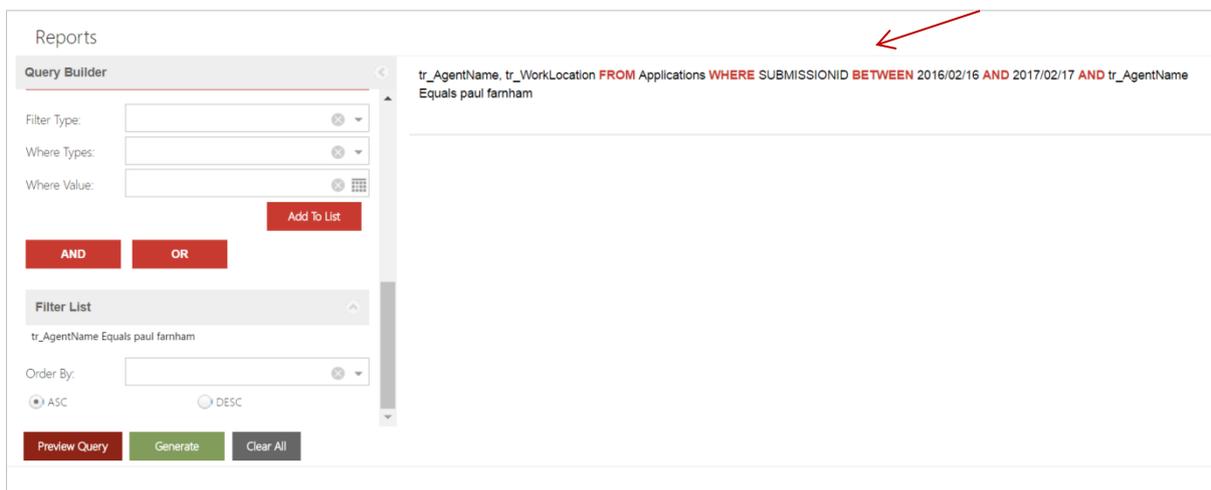
On the left-hand side of your **'Reports'** tab is your report generator where you can select the different fields or criteria in DSLive that you wish to create a report on. The blank space on the right-hand side is where your report results will appear.



The screenshot shows the 'Reports' section of the Admin Tool. On the left is a navigation menu with 'Reports' highlighted. The main area is titled 'Reports' and contains a 'Query Builder' panel. This panel has sections for 'Report Templates', 'Report Query Builder', and 'Dates Between Criteria'. The 'Report Query Builder' section includes dropdown menus for 'Application Type', 'Report Type', and 'Field Types', along with a 'Select All Fields' button. The 'Dates Between Criteria' section includes dropdowns for 'Date Field', 'From', and 'To', with calendar icons for the date fields. At the bottom of the panel are buttons for 'Preview Query', 'Generate', and 'Clear All'.

Preview Query

At any time while selecting your criteria you can press the **'Preview Query'** button to preview the report pattern you are creating.



This screenshot shows the 'Reports' section with the 'Query Builder' panel. The 'Filter List' section contains the text 'tr\_AgentName Equals paul farnham'. Below it, the 'Order By' dropdown is set to 'ASC'. At the bottom are buttons for 'Preview Query', 'Generate', and 'Clear All'. On the right side of the interface, a red arrow points to the generated SQL query: `tr_AgentName, tr_WorkLocation FROM Applications WHERE SUBMISSIONID BETWEEN 2016/02/16 AND 2017/02/17 AND tr_AgentName Equals paul farnham`.

## Section A: Choosing what you wish to create a report on

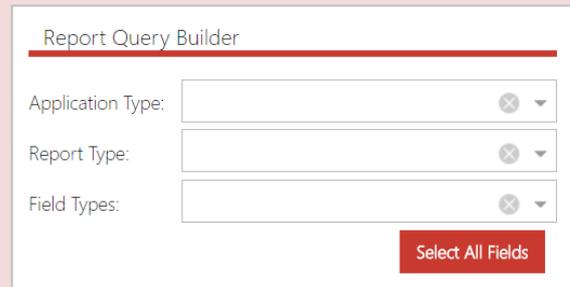
The first thing you will need to do is choose what you wish to create a report about.

### There are three fields to define.

First you need to choose which type of application you wish to create a report on and secondly whether you wish to know about its application information, its inspection information or both at once.

Third and final you need to choose the columns of information you wish to see in your report ie. agent name, work location etc.

We will demonstrate these steps below.



Report Query Builder

Application Type:

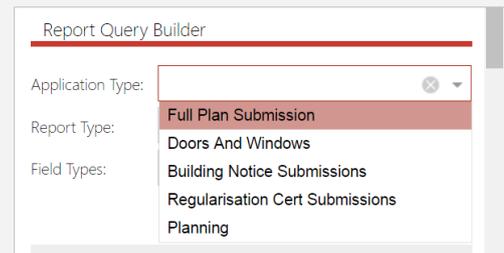
Report Type:

Field Types:

Select All Fields

### 1. Application Type

First you need to choose which type of application you wish to create a report on (you can only create a report on one application type at a time).



Report Query Builder

Application Type:

Report Type:

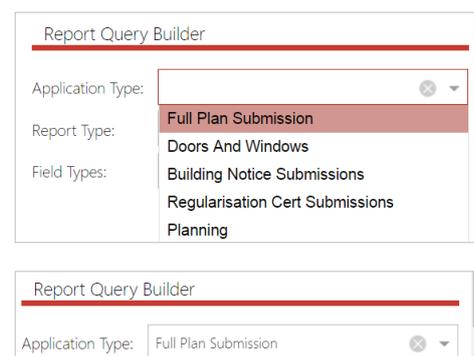
Field Types:

- Full Plan Submission
- Doors And Windows
- Building Notice Submissions
- Regularisation Cert Submissions
- Planning

### How to do this:

Click on the small arrow next to the 'application type' field to view the drop-down list of application types

Click on an item in the list to select it and it will be added to the field.



Report Query Builder

Application Type:

Report Type:

Field Types:

- Full Plan Submission
- Doors And Windows
- Building Notice Submissions
- Regularisation Cert Submissions
- Planning

Report Query Builder

Application Type: Full Plan Submission

## 2. Report Type: Application or Inspection Information

Now choose whether you would like to create a report on its application information, its inspection information or both at once.

Report Query Builder

Application Type: Full Plan Submission

Report Type: (empty)

Field Types: Inspections, Applications

Select All Fields

### How to do this:

Click on an item in the drop-down list to add it to the field. To close the drop-down list click the arrow at the edge of the field or click elsewhere on your screen. If you wish to add another item, simply repeat the same process.

### How to remove:

If you change your mind and wish to remove an item reopen the drop-down list and simply click on the item again to remove it. Alternatively click the 'Clear' icon to remove all items.

Application Type: Full Plan Submission

Report Type: Applications

Field Types: Inspections, Applications

Select All Fields

Application Type: Full Plan Submission

Report Type: Applications, Inspections

Field Types: Inspections, Applications

Select All Fields

## 3. Field Type: The columns of information you wish to see

Now you need to choose what columns of information you wish to see, ie. application submission number, back office ID number, work location address, agent name, submission date etc.

Report Query E

Application Type: COST\_OF\_WORK

Report Type: CreatedBy, CreatedDate

Field Types: (empty)

Select All Fields

### How to do this:

Open the drop-down list and click on an item to add it to the field. Repeat the same process till you have all the items you desire. If you wish your columns to be in a particular order, then you will need to add the items in that order.

Report Query E

Application Type: SUBMITTEDBY

Report Type: tr\_AgentLocation, tr\_AgentName

Field Types: SUBMISSIONID

Select All Fields

Field Types: SUBMISSIONID, ApplicationID, tr\_WorkLc

Select All Fields

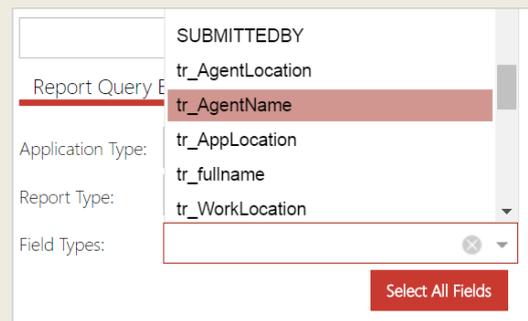
## Tip: 'Tr\_' Fields

In an application or inspection, information such as names or addresses are divided into a number of fields ie.

*'Title', 'Firstname', 'Surname'*, (3 fields) or  
*'Number', 'Street', 'Town', 'Postcode'* (4 fields).

If you wish to add names or addresses to your report, you don't have to select each field individually but can ask the report builder to group them together for you.

This is where the **Tr\_** fields come in. Fields labelled **Tr\_** at the beginning will compile information and add them together as one item. Eg. **tr\_AgentName** or **tr\_WorkLocation** .



The screenshot shows a report builder interface with a list of fields. The fields listed are: SUBMITTEDBY, tr\_AgentLocation, tr\_AgentName (highlighted in red), tr\_AppLocation, tr\_fullname, and tr\_WorkLocation. The interface includes labels for 'Report Query E', 'Application Type:', 'Report Type:', and 'Field Types:'. A red button labeled 'Select All Fields' is located at the bottom right of the list.

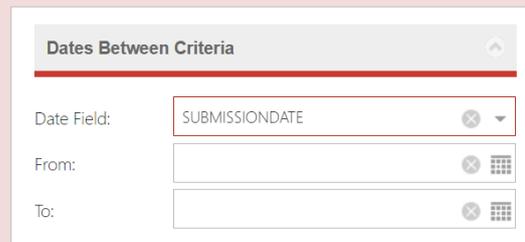
## How to remove:

If you change your mind and wish to remove a choice select the drop-down list and simply clicking on the item again will remove it. Alternatively click the **'Clear'** icon to remove all items. 

## Section B: Choosing your dates

If you wish your report on applications or inspections to be about a specific date or during a particular period, your next step is to define this criteria. You can leave this criteria blank if you do not require your report to be about a specific date or dates.

You can choose what 'type' of date you wish to define your report by ie. submission date for applications or maybe the date the inspections are scheduled etc and you will then be able to choose the specific dates from a calendar.



Dates Between Criteria

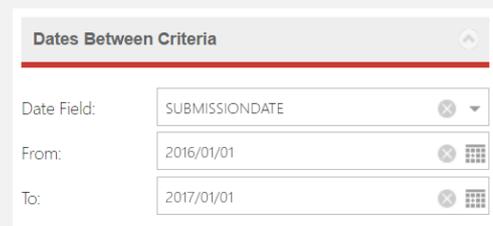
Date Field: SUBMISSIONDATE

From:

To:

### 1. Type of date

First you can choose what kind of date information you wish to define your report by ie. submission date for applications or maybe the date the inspections are scheduled etc.



Dates Between Criteria

Date Field: SUBMISSIONDATE

From: 2016/01/01

To: 2017/01/01

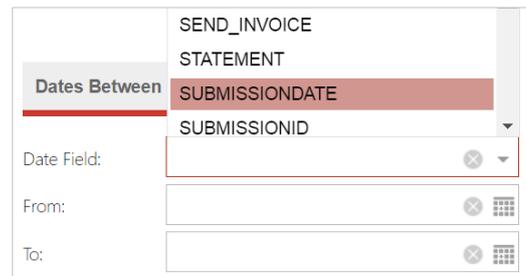
#### How to do this:

Open the drop-down list of the 'Date Field'.

If earlier you chose to create a report just on 'applications', the list that appears will only give you types of date related to applications ie. application submission date.

If instead you chose to create a report just on 'inspections', you will only be given types related to those ie. scheduled inspection date. If however you chose both, all date types will be available in the list.

Simply click on an item to add it to the field.



Dates Between

SEND\_INVOICE

STATEMENT

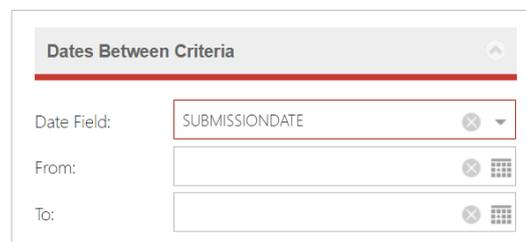
SUBMISSIONDATE

SUBMISSIONID

Date Field:

From:

To:



Dates Between Criteria

Date Field: SUBMISSIONDATE

From:

To:

#### How to remove:

If you change your mind and wish to remove a choice you can either select a different item from the list to replace it or alternatively click the 'Clear' icon. ✕

## 2. Date range

Now you can choose your specific dates from a calendar ie. I want to know about all applications submitted on or inspections scheduled on the 1<sup>st</sup> Feb 17 or between 1<sup>st</sup> Jan 15 and the 31<sup>st</sup> Dec 15.

Dates Between Criteria

Date Field: SUBMISSIONDATE

From: 2016/01/01

To: 2017/01/01

### How to do this:

First click on the **'Date From'** field. This is the date you wish your report to begin from. The calendar will close and insert your date to the field.

You can then click on the **'Date To'** to select the last date you wish your report to report on.

If you want to report on one single date, select that date in both the **'From'** and **'To'** fields.

Dates Between Criteria

Date Field: SUBMISSIONDATE

From: 2015/01/01

To: 2017/01/01

Filter By

Filter Type:

Where Types:

Where Value:

Today

Preview Query Generate Clear All

Dates Between Criteria

Date Field: SUBMISSIONDATE

From: 2016/01/01

To: 2017/01/01

### How to remove:

If you change your mind and wish to remove a choice you can either select a different date from one of the field calendars to replace it or alternatively click the **'Clear'** icon.

## Section C: Filtering your information

Now you may wish to filter the information you will see in your report ie. you may wish to only see the applications submitted by a specific agent. You will be able to add a number of different filters which will appear under the 'Filter List' section.

There are three fields to define when adding a filter:

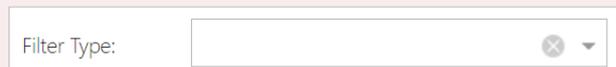


The 'Filter By' dialog box contains three input fields, each with a clear (X) button and a dropdown arrow:

- Filter Type: [ ]
- Where Types: [ ]
- Where Value: [ ]

**1. Filter type (or 'what') :**

*Eg. agent name, work location, fee total*



Filter Type: [ ]

**2. Where Types (or 'how'):**

*Eg. is, isn't, contains, is less than, is more than*



Where Types: [ ]

**3. Where Value (or 'by This')**

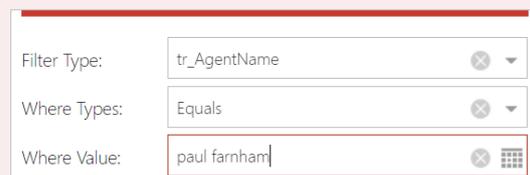
*Eg. Paul Farnham, 3 Royal Crescent, £194.00*



Where Value: [ ]

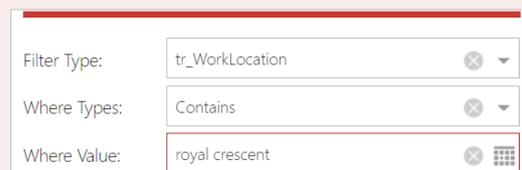
Here are a few examples:

Show only applications where agent name is Paul Farnham:



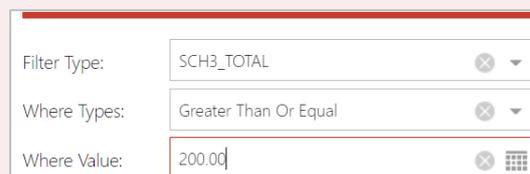
Filter Type: tr\_AgentName  
Where Types: Equals  
Where Value: paul farnham

Show only applications where work location contains Royal Crescent:



Filter Type: tr\_WorkLocation  
Where Types: Contains  
Where Value: royal crescent

Show only applications where the fee total was £200 or more:



Filter Type: SCH3\_TOTAL  
Where Types: Greater Than Or Equal  
Where Value: 200.00

### Tip: Entering information correctly

When typing information into the filter **'value'** field and giving the system a filter commander you need to think about how you do this to get a successful result in your report.

Eg. In DSLive an application address will be in this format **3, Royal Crescent** with a comma and a space after the house number.

There are two options for this:

You can use the **'equals/is'** command ie **'Work Location' 'equals/is' '3, Royal Crescent'**. This is an **'exact match'** search so you will need to enter the address in the exact format and spelling in which it appears in the application DSLive. If you searched for 3 Royal Crescent without the comma after the house number you wouldn't get a match.

You could also use the **'contains'** command. Here you could enter Royal Crescent and your results would include all those applications for 3, Royal Crescent and 3 Royal Crescent, however it would also bring back applications you may have had for other house numbers in Royal Crescent.

## 1. Adding your first filter

### How to do this:

1. In the first field select your filter type or subject from the drop down list. Eg. agent's name.
2. In the second field choose 'how' you want it to filter.
3. Finally in the last field type in the information you would like the system to filter by.

Filter Type:

Where Types:

Where Value:

AND

Filter Type:

Where Types:

Where Value:

AND

Filter By

Filter Type:

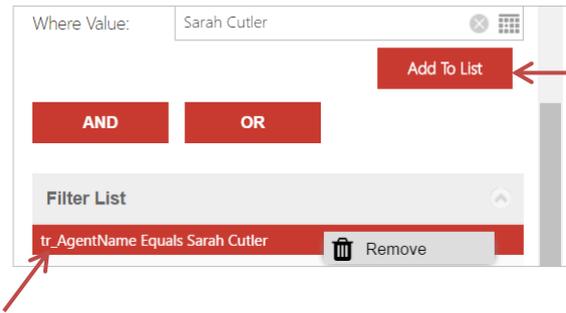
Where Types:

Where Value:

Add To List

4. Once you're happy with the filter click the **'Add to List'** button. The new filter will appear in the **'Filter List'** just below your filter fields.

Any time you add a filter it will appear in the list. You can remove a filter from the list by right-clicking on it and selecting **'remove'**



## 2. Adding another filter

Once you have added the filter to the list, you are ready to add another.

Once you have added the filter to the list you are ready to add another by repeating the same process, but first you will need to add an **'and'** or **'or'** button located just below your filter fields.

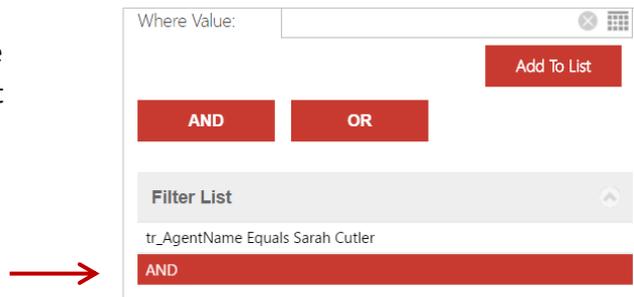
### The 'And' / 'Or' buttons



Before entering your next filter criteria you will need to select the **'and'** or **'or'** button to let the system know how the two filter items should work together.

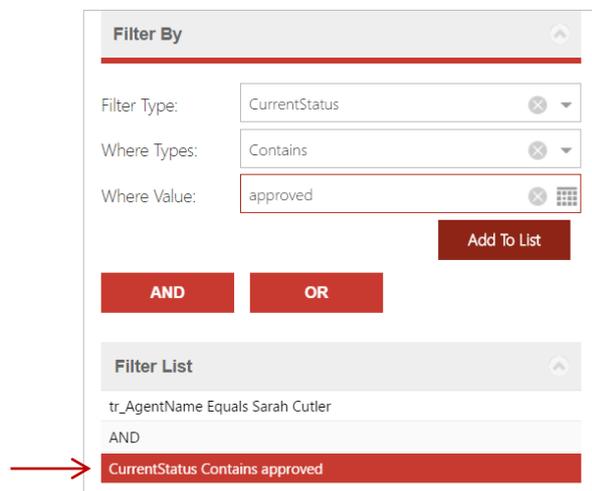
**Eg.** Show only applications where 'agent name' is 'Sarah Cutler' **AND** the 'current status' contains 'approved'.

When you click on one of the buttons the **'and'** or **'or'** will be added to your filter list below the first filter item you added.



You can then repeat the earlier process of adding filter criteria.

Click **'Add to List'** to add your new item to the Filter List. It will be appear below the **'and'** or **'or'** you added.



## Section D: Generating, viewing and exporting your report

You are now ready to generate your report. This section will show you how to view, edit, export and save your report criteria as a template for next time.

### 1. Generating and viewing your report

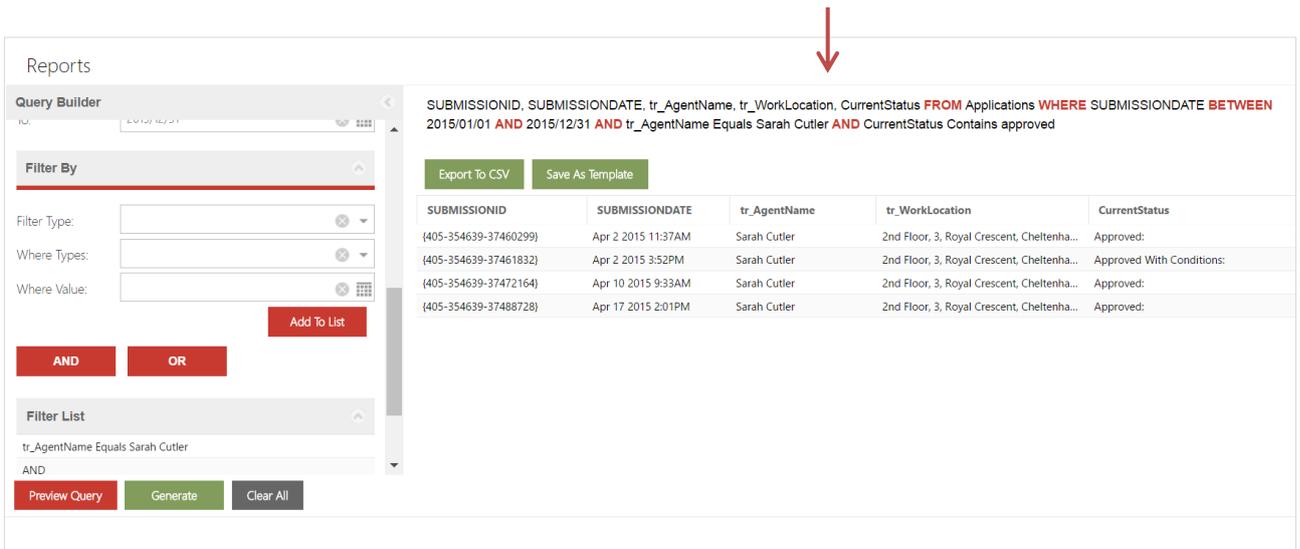
To generate your report simply click the green **'Generate'** button at the bottom of your report generator section.

Generate

To also view the criteria pattern you selected above your results, you can click the **'Preview Query'** button.

Preview Query

In the results section, the criteria pattern will be listed at the top while your report results will be generated below:



The screenshot shows the 'Reports' interface. On the left is the 'Query Builder' with filter criteria: 'Filter By' (empty), 'Filter Type' (empty), 'Where Types' (empty), and 'Where Value' (empty). Below these are 'AND' and 'OR' buttons, and an 'Add To List' button. The 'Filter List' shows 'tr\_AgentName Equals Sarah Cutler' and 'AND'. At the bottom of the query builder are 'Preview Query', 'Generate', and 'Clear All' buttons. On the right, the criteria pattern is displayed: 'SUBMISSIONID, SUBMISSIONDATE, tr\_AgentName, tr\_WorkLocation, CurrentStatus FROM Applications WHERE SUBMISSIONDATE BETWEEN 2015/01/01 AND 2015/12/31 AND tr\_AgentName Equals Sarah Cutler AND CurrentStatus Contains approved'. Below this are 'Export To CSV' and 'Save As Template' buttons. The report table has the following data:

SUBMISSIONID	SUBMISSIONDATE	tr_AgentName	tr_WorkLocation	CurrentStatus
(405-354639-37460299)	Apr 2 2015 11:37AM	Sarah Cutler	2nd Floor, 3, Royal Crescent, Cheltenham...	Approved:
(405-354639-37461832)	Apr 2 2015 3:52PM	Sarah Cutler	2nd Floor, 3, Royal Crescent, Cheltenham...	Approved With Conditions:
(405-354639-37472164)	Apr 10 2015 9:33AM	Sarah Cutler	2nd Floor, 3, Royal Crescent, Cheltenham...	Approved:
(405-354639-37488728)	Apr 17 2015 2:01PM	Sarah Cutler	2nd Floor, 3, Royal Crescent, Cheltenham...	Approved:

As you can see the application or inspection information selected earlier are displayed in columns in the report.

We can see that the reports only contains applications submitted by agent 'Sarah Cutler' whose status contains 'approved' as we stipulated in our filters. We can also see that it has only listed the applications submitted during 2015.

Finally we can see that the report has been sorted by the submission date in ascending order. This is the default order all reports will be ordered by. Find out how to change this below.

SUBMISSIONID, SUBMISSIONDATE, tr\_AgentName, tr\_WorkLocation, CurrentStatus FROM Applications WHERE SUBMISSIONDATE BETWEEN 2015/01/01 AND 2015/12/31 AND tr\_AgentName Equals Sarah Cutler AND CurrentStatus Contains approved

Export To CSV

Save As Template

SUBMISSIONID	SUBMISSIONDATE	tr_AgentName	tr_WorkLocation	CurrentStatus
{405-354639-37460299}	Apr 2 2015 11:37AM	Sarah Cutler	2nd Floor, 3, Royal Crescent, Cheltenha...	Approved:
{405-354639-37461832}	Apr 2 2015 3:52PM	Sarah Cutler	2nd Floor, 3, Royal Crescent, Cheltenha...	Approved With Conditions:
{405-354639-37472164}	Apr 10 2015 9:33AM	Sarah Cutler	2nd Floor, 3, Royal Crescent, Cheltenha...	Approved:
{405-354639-37488728}	Apr 17 2015 2:01PM	Sarah Cutler	2nd Floor, 3, Royal Crescent, Cheltenha...	Approved:

### Changing the Sort Order:

You can now choose to change the order your report information will be sorted by ie. submission date descending instead of ascending or if you have lots of different agents in your report then agent names ascending from A-Z.

To change the order click the arrow next to the **'Order by'** field to view a drop-down list of options.

Order By:  ⌵

ASC  DESC

Preview Query Generate Clear All

You need to select one of your columns of information in your report ie. submission date, submission ID, agent name etc.

Once you've selected your item choose whether you would like to sort that column by **'ascending'** or **'descending'**.

Click **'Generate'** again to apply.

Generate

## 2. Changing your criteria

If you need to change, add or remove an item of criteria in your report, you can do this by changing or removing an item in the report generator to the left and then simply clicking the generate button again to re-generate your report with the changes applied. For how to remove individual criteria items, return to previous sections of this guide.

To clear your report and **all** criteria, click the **'Clear'** button at the bottom of the **Report Builder**.

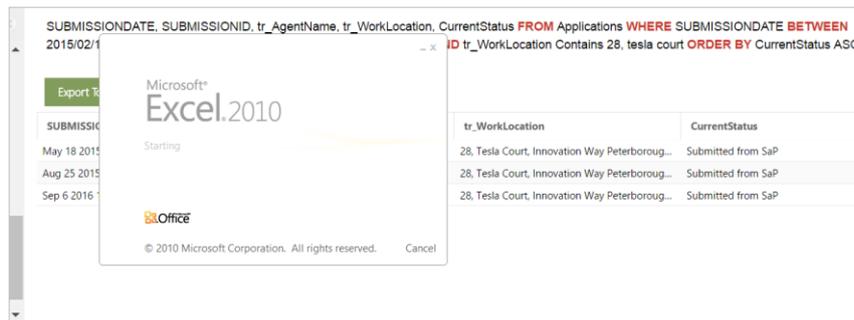
Clear All

### 3. Exporting your report

Once you have generated your report you can export the results. Click the **'Export to CSV'** button in the results section.

Export To CSV

The system will automatically open Excel with your report entered into an Excel spreadsheet. You can combine different reports into one spreadsheet once you have saved them to Excel by selecting, copying and pasting.



### 4. Saving a template of your report criteria

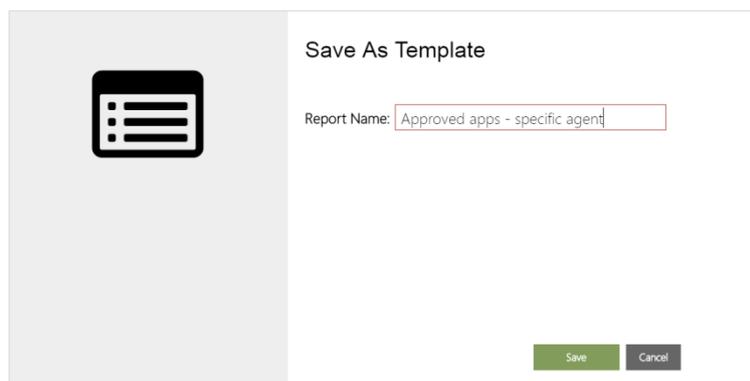
If you planning on running the same reports on a regular basis, you can save templates of them so that you don't have to spend time selecting the same criteria again and again.

Once you've generated your report simply click the **'Save as Template'** button.

Save As Template

You'll be asked to give your report a name.

The next time you go to create that report, simply load the template from the template list and it will automatically add your criteria.





The DataSpace Live Guide

Help & Support:

helpdesk@resolutiondm.com

01242-260505

For other guide-sheets and video tutorials visit the DSLive Help Hub:

<http://www.resolutiondm.com/dslivehelphub>

