Training Guide

GLOBAL REPORTING

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Contents

Assigning Access Levels

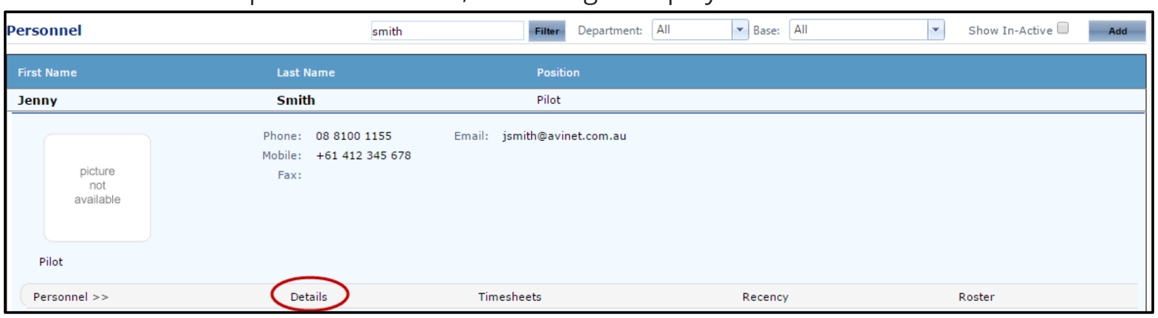
Before users can attempt to manage global reporting, they must be assigned the correct access levels. Follow the steps below to assign the access levels:

Step 1. Select **Operations > People > Personnel**. The **Personnel** screen is displayed.

Step 2. Filter the **Personnel** screen according to your requirements.

- Enter filter criteria in the text-box and click [Filter].
- Select a value from the **Department** drop-down list to view personnel located in a particular department.
- Select a value from the **Base** drop-down list to view personnel located in a particular base location.
- Select the **Show In-Active** tick box to include personnel that are no longer active in the system. This includes personnel which have ceased employment with your organisation.

Step 3. Click [Details] to view detailed personnel information. If you do not have the required access level to view personnel details, a warning is displayed.



Step 4. Select 'Access Levels' from the **Personnel Profile** pane.

Step 5. Click [Edit].

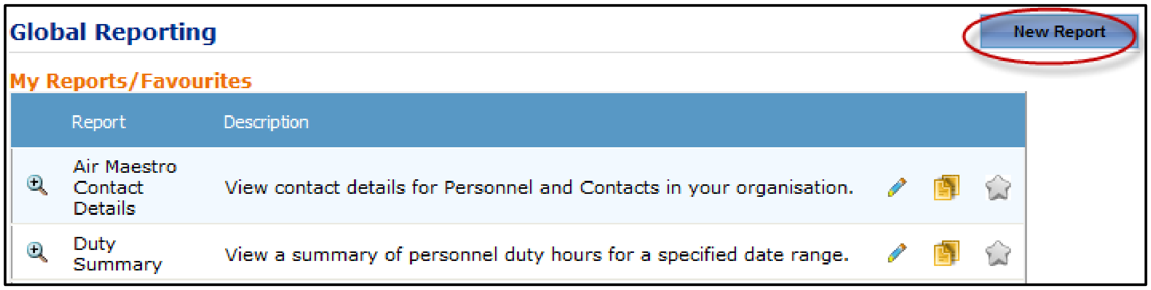
Step 6. Select the **Air Maestro Administration > Reports > Modify All** tick box.

Step 7. Click [OK].

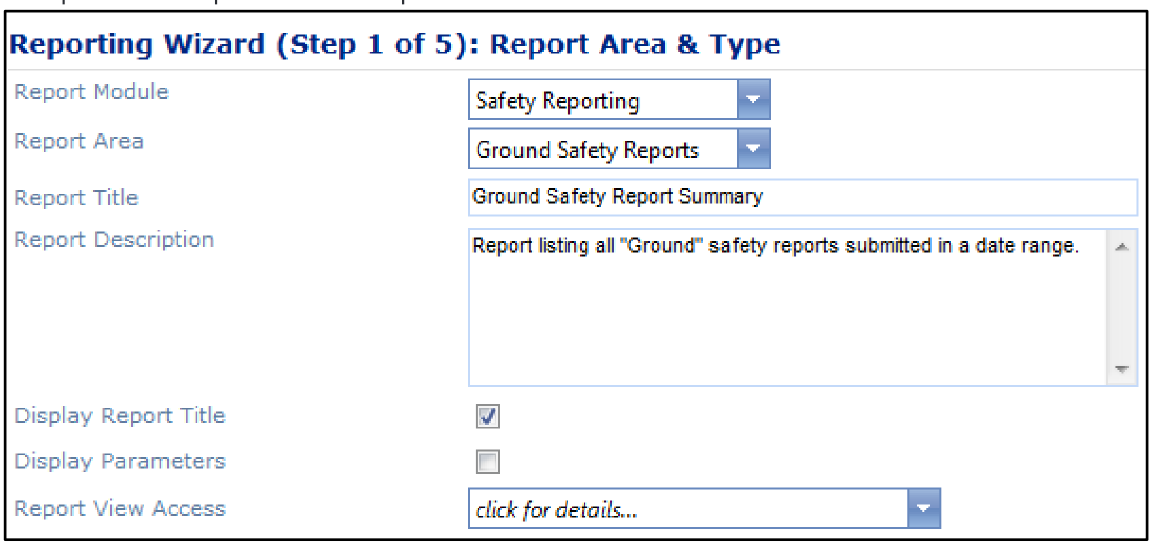
Creating a Report

Step 1. Select **Operations > Reporting**. The **Global Reporting** screen is displayed.

Step 2. Click [New Report]. The **Reporting Wizard (Step 1 of 5): Report Area & Type** screen is displayed.



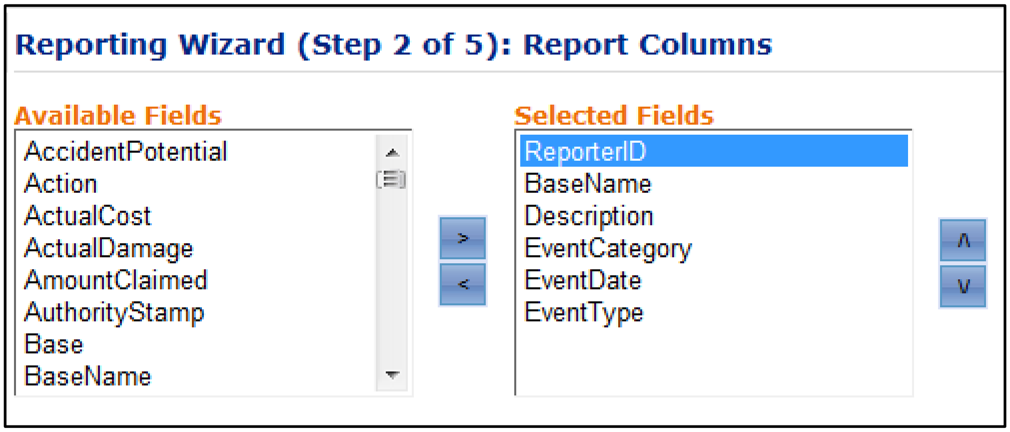
Step 3. Complete the required fields as per below.



Field	Description
Report Module	Select the applicable module you wish to report on.
Report Area	Select the applicable area within the module you wish to report on.
Report Title	Enter a title for the report.
Report Description	Enter a description for the report.
Display Report Title	Select the tick box to display the report title in the report output.
Display Parameters	Select the tick box to display the report parameters (Date Period etc.) in the report output.
Report View Access	Assign the personnel who can access the report.

Step 4. Click [Next]. The **Reporting Wizard (Step 2 of 5): Report Columns** screen is displayed.

Step 5. Move the required fields from the **Available Fields** to the **Selected Fields** pane. Use the arrows to change the field placement in the report.

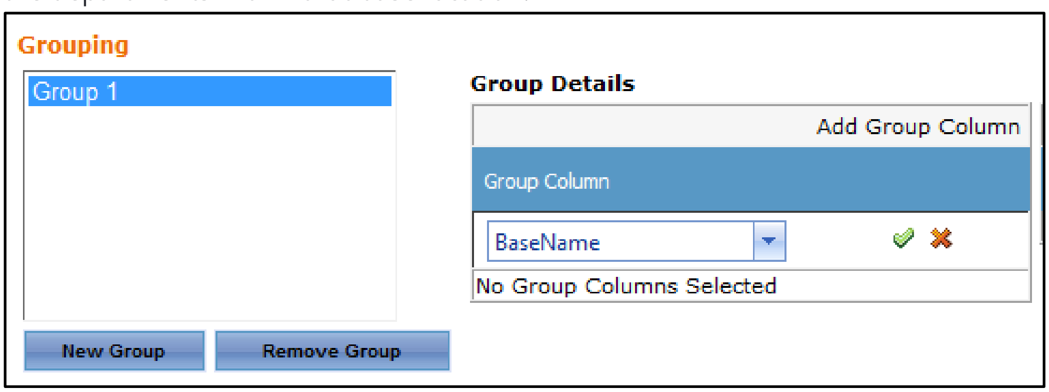


Step 6. Click [New Group] to group the report output by a selected field.

Step 7. Click 'Group 1' in the **Grouping** pane.

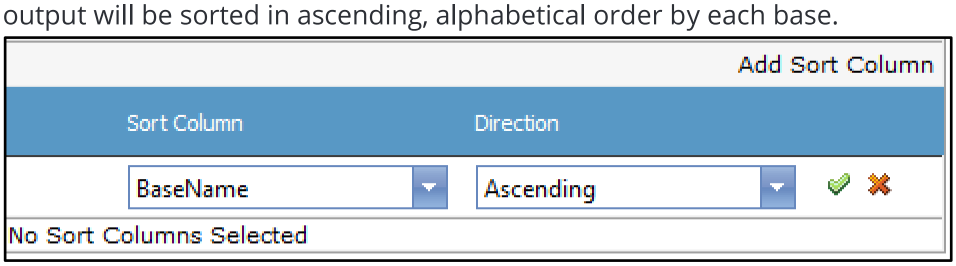
Step 8. Click [Add Group Column].

Step 9. Select the field to group the report by and click insert [✔]. In the example below, the report output will be grouped into each base. You can create multiple groupings if required. For example, a report may firstly be grouped by a base location and secondly by the departments within that base location.



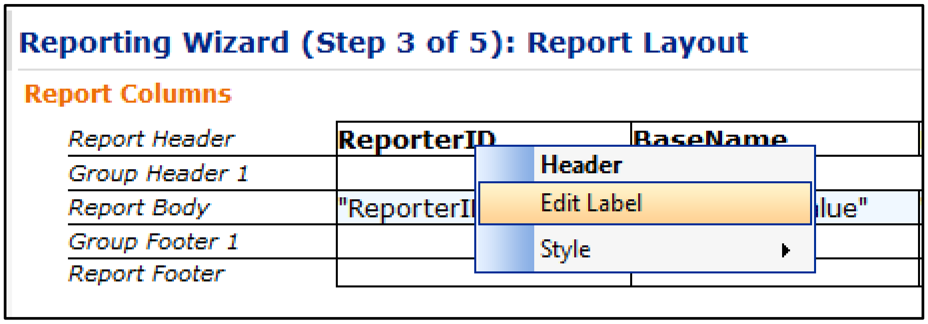
Step 10. Click [Add Sort Column].

Step 11. Select the sort order for the report and click insert [✔]. In the example below, the report output will be sorted in ascending, alphabetical order by each base.



Step 12. Click [Next]. The **Reporting Wizard (Step 3 of 5): Report Layout** screen is displayed.

Step 13. Select the required layout and formatting options in the **Report Columns** pane.

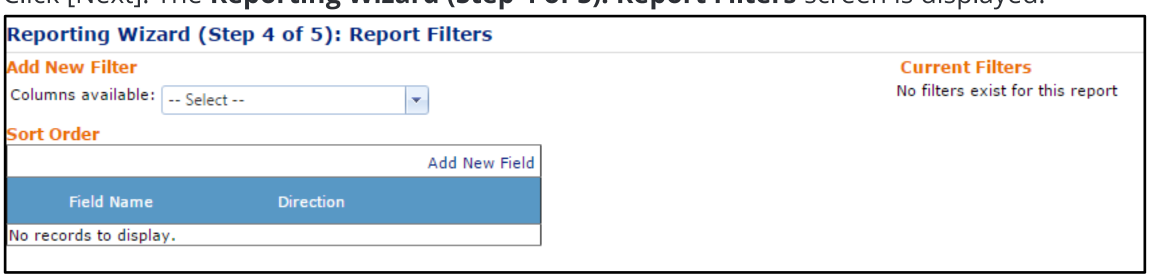


For example:

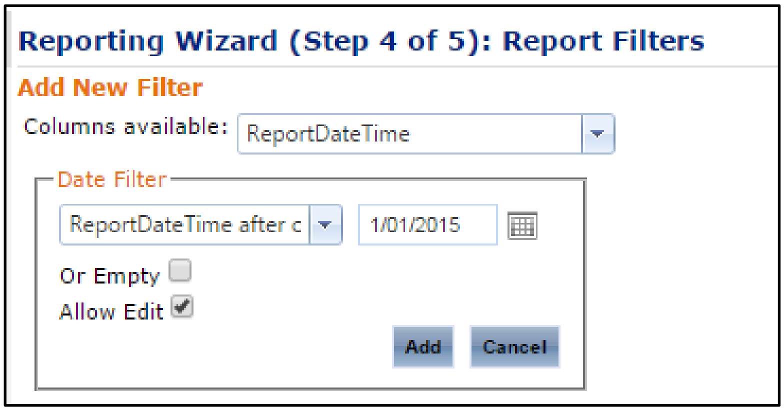
- To rename a column title, right-click the column title and select **Edit** Label.
- To specify a font style (size, colour, bold, italics) right-click on a column and select **Style > Font > <required option>**.
- To include the name of the group in the resulting report, right-click in the **Group Header 1** row and select **Set Group Label > <required option>**. This option is only available if you have included a group in **Step 2** of the **Reporting Wizard**.
- To calculate values in certain columns, right-click in **the Group Footer** or **Report Footer** row for the required column and select **Calculate > <required option>**.
- To hide the contents of the report and only include the report headers and footers, right-click in the **Report Body** row and select **Hide Details Row**. This option is particularly useful if you have included report totals in the **Group and/or Report Footer** and only wish to view a summary of the results and not each individual record.

Step 14. Select the report page layout in the **Page Layout** pane.

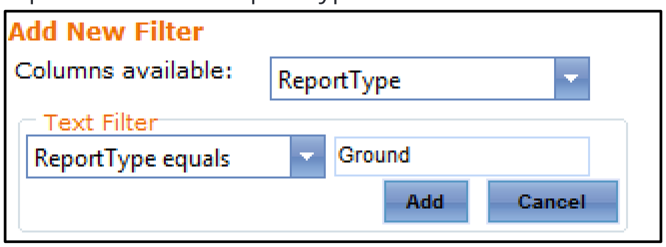
Step 15. Click [Next]. The **Reporting Wizard (Step 4 of 5): Report Filters** screen is displayed.



Step 16. Select the required filter from the drop-down list and complete the filter properties. The setup options differ, depending on the selected filter type. In the example below, the report will contain a filter allowing users to only display reports submitted after a particular date. As the '1/1/2015' is selected as a default value, when the report is generated only safety reports submitted after or on this date are displayed. Click [Add] to include the filter in the report.



In this report example, a new 'Report Type' filter must be created to only return 'Ground' reports versus all report types.

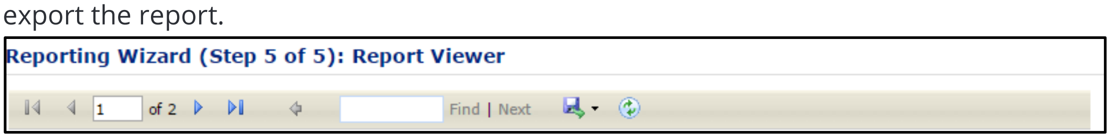


*Selecting the **Or Empty** option includes records in the report where the filter data is not set. In this case, the report would also return records where the Report Date is blank. Selecting the **Allow Edit** option allows personnel with access to the report to change the filter value. In this case, the report date will be editable.*

Step 17. Click [Next]. The **Reporting Wizard (Step 5 of 5): Report Viewer** screen is displayed.

Step 18. Filter the screen according to your requirements and click [View Report]. Note: If no filters are enabled for this report, the report is automatically displayed.

Step 19. Use the report viewer toolbar to navigate around the report, search for keywords and export the report.



Field	Description
	Click this icon to return to the first page of the report results.
	Click this icon to view the previous page of the report results.
	Click this icon to view the next page of the report results.
	Click this icon to view the last page of the report results.
	Enter a keyword into the text box and click **Find**. Click **Next** to highlight the next record matching the entered keyword.
	Click this icon to export the report results to Excel, PDF or Word.
	Click this icon to refresh the report results. Use this icon when you change any values in the filters.

Viewing a Report

Step 1. Select **Operations > Reporting**. The **Global Reporting** screen is displayed.

Step 2. Click [ ] corresponding with the report you wish to view. The **Reporting Wizard (Step 5 of 5): Report Viewer** screen is displayed.

Step 3. Filter the screen according to your requirements (if enabled for the report) and click [View Report].

Saving a Report to Favourites

Step 1. Select **Operations > Reporting**. The **Global Reporting** screen is displayed.

Step 2. Click [ ] corresponding with the report you wish to save to your favourites. A copy of the report is displayed in the **My Reports/Favourites** pane on the **Global Reporting** screen.

*To remove the report from your favourites, click the [ ] in the **My Reports/Favourites** pane.*

Duplicating a Report

Step 1. Select **Operations > Reporting**. The **Global Reporting** screen is displayed.

Step 2. Click [ ] corresponding with the report you wish to duplicate. A copy of the report is saved and the **Reporting Wizard (Step 1 of 5): Report Area & Type** screen is displayed.

Step 3. Enter a new name for the report in the **Report Title** field.

Step 4. Modify the remaining report fields as required and click [Next]. The **Reporting Wizard (Step 2 of 5): Report Columns** screen is displayed.

Step 5. Continue modifying the report fields as required and click [Next] to save the changes.

Deleting a Report

Step 1. Select **Operations > Reporting**. The **Global Reporting** screen is displayed.

Step 2. Click [ ] corresponding with the report to delete. A confirmation dialog box is displayed.

Step 3. Click [OK]. The report is deleted from the **Available Reports** pane on the **Global Reporting** screen.