

ChilliDB – Reporting Interface

Introduction to Reporting

- **Polymorphic Solutions Reporting Views** - Polymorphic Solutions provide a reporting layer to our database using Database Views. Our reporting views are prefixed with "rpt_". While there may be some deprecated (obsolete) reporting views present within the database, they will in time be removed. Those deprecated views are named with a "v_" prefix. You should avoid using those, and migrate any reports you may have to use the "rpt_" reporting views.
- **Creating your own Customised Views:** *When the Polymorphic Solutions Reporting Views aren't sufficient for your needs, you may choose to create custom database views, tables, or stored procedures (collectively referred to as Database Objects) within your database. To ensure that updates to the system do not overwrite your customised database objects, Polymorphic Solutions recommends that you prefix your custom Database Objects with a prefix. We recommend using your organisation prefix. For example a view showing Contacts in Brisbane for a company called "ACME Inc" would use create a view named "acme_Contacts_In_Brisbane". The "rpt" prefix is reserved and should not be used for your custom reporting views.*
- **Automatic View Generation** – Dynamic Data automatically generated Reporting Views for each "Section" of Dynamic Data. Custom "Address" and "Communication" types do not automatically generate Reporting Views. If you create custom "Address" and "Communication" types you need to use ChilliDB to refresh your reporting views by navigating to the ChilliDB "Reports" menu > "Reporting View Maintenance" > "Reporting Views" menu item.
- **Report Branding** – Using information from the Crystal Report branding view to display your company details will allow you to easily share your reports with other ChilliDB users in the community. You can configure the information displayed in this view by selecting "Reports" -> "Report Branding" from the ChilliDB menu. From that screen you configure your display name, address details, privacy or confidentiality statement and even upload your Division logo image to be included in your reports.
- **Modifying or Copying Polymorphic Solutions Reports:** *You are free to modify the Polymorphic Solutions reports and customise them to suit your needs. To avoid them being overwritten, you should make a copy and give them a different name.*
- **Filtering out Expired records:** ChilliDB records a date in the "Expired" field of "Contacts" and "Organisations" reporting views as a datetime value, meaning if a datetime is present, that record is expired. If it is not expired, it is NULL. Example formulas for "Contacts" and "Organisations" would be: IsNull ({rpt_Contact.Expired}) for Contacts, IsNull ({rpt_Organisations.Expired}) for Organisations. Filtering out expired records can also be performed by utilising "Is Expired" field of "Contacts" and "Organisations" reporting views. The field is storing "Yes" or "No" value to indicate if the Contacts or Organisations have expired. Some other reporting views may present "Expired" and "Is Expired" fields if their records are allowed to be expired.
- **Date Time Values are stored in Greenwich Mean Time (GMT) time:** With 2.5.0, it was necessary for ChilliDB to switch the database date time data from storing date times values in localised time to storing them in Greenwich Mean Time (GMT). All our "rpt_" reporting views automatically convert the GMT date time values to localised date time values for you. If you report off database directly, you should obtain a copy of the document called "Fact Sheet – 2.5.0 Timezone Support and Reporting off of Tables instead of Views" for further instructions.

Using/Configuring Crystal Reports

- **Connection Details** – When your ChilliDB installation is complete, Polymorphic Solutions send an "Installation Complete" email which contains all the information needed to connect to your database server (i.e. Server name, Username, Password, Database name).
- **Database Connections – Creating:** Crystal Reports should be written using **OLE DB (ADO)** to connect to your SQL Server. Do not use **ODBC**.
- **If you have Crystal Reports Version 9:** Crystal Reports 9 forces the parameters in your reports to be mandatory, so you cannot leave parameters blank. If you do not want your reports to always filter on criteria, you should modify your reports Record Selection to handle entering values like "-" or "-1" or "01 Jan 1900" to signify no value, and enter those values as criteria. Version XI or better do not place any such limitations on the parameters used in your reports.
- **Crystal Reports – Automatic Smart Linking:** We recommend that you avoid using the "Auto Link" feature within the Crystal Reports Database Expert. What it will do is try to link tables/views based on their field name or data types, however it often this is not correct and can lead to missing data or incorrect data shown in your report. You can set this as your preference when writing all reports in Crystal by going to "File" menu > "Options" > "Database" tab of the popup which appears > set "Automatic Smart Linking" to off.
- **Crystal Reports - Save Data With Report:** This feature will allow the report to cache data shown in the report from the database when writing the report. When ChilliDB runs the report, it shows the cached data, not live data. It is best if you disable this preference through the "File" menu > "Options" > "Reporting" tab of the popup which appears > set "Save Data With Report" to off. If you decide to use Saved Data while authoring your report, you can check the status or enable/disable this feature from the "File" menu > "Save Data with Report". If you receive a report from someone, you should check this option is off before uploading into ChilliDB.
- **Crystal Reports - No Printer:** We recommend turning this option off to increase the speed of displaying reports in ChilliDB. You need to do this for each report you write (i.e. its not a configuration option). This option is found on the "File" menu > "Page Setup" > "Printer Options" sections of the popup window which appears > set "No Printer (optimized for screen display)" to being checked.

CORE

ORGANISATIONS
Page 3

CONTACTS
Page 4

NOTES
Page 5

EVENTS
Page 6

APPOINTMENTS
Page 7

QUICK LINK
Page 7

NEWS
Page 7

DISTRIBUTION LISTS
Page 7

REPORT BRANDING
Page 8

SYSTEM
INFORMATION
Page 8

MODULES

SURVEY
Page 8

ASSET REGISTER
Page 8

TIMESHEETS
Page 9

ORDERS
Page 9

ATAPS
Page 9

DATA MINING
Page 10

MEMBERSHIP
Page 10

DOCUMENT
REGISTER
Page 11

CLIENT
ADMINISTRATION
Page 12, 13

MSOAP
Page 14

QUALITY
IMPROVEMENT
Page 15

REPRESENTATION
Page 15

CASE MANAGEMENT
Page 16

Organisation Information

Base Organisation Information

Views: rpt_Organisation
rpt_Organisation_History
rpt_Organisation_Standards
rpt_Organisation_Relationship
rpt_Organisation_Base_Section

Notes:

- Organisations are expired, not deleted. Expired organisations will have a value in the "Expired" field.
- The rpt_Contact_Base_Section is generated by the application and may contain some Dynamic Data fields.

Link using "Organisation Id" field

Preferred Mailing Address

View: rpt_Organisation_PREFERRED_Mail_Address

Business Address

View: rpt_Organisation_Business_Mail_Address
rpt_Organisation_Business_Physical_Address

Link using "Organisation Id" field

Home Address

View: rpt_Organisation_Home_Mail_Address
rpt_Organisation_Home_Physical_Address

Other Address Types

Views: rpt_Organisation_*_Address

Notes:

- These views are generated by the application and will be named to match the "Address Type" value.

Link using "Organisation Id" field

Business Phone, Fax and E-mail Communication

Views: rpt_Organisation_Business_Phone_Communication
rpt_Organisation_Business_Mobile_Communication
rpt_Organisation_Business_Fax_Communication
rpt_Organisation_Business_E-mail_Communication

Home Phone, Fax and E-mail Communication

Views: rpt_Organisation_Home_Phone_Communication
rpt_Organisation_Home_Mobile_Communication
rpt_Organisation_Home_Fax_Communication
rpt_Organisation_Home_E-mail_Communication

Notes and Resources

Views: rpt_Organisation_Note
rpt_Organisation_Resource

Other Communication Types

Views: rpt_Organisation_*_Phone_Communication
rpt_Organisation_*_Fax_Communication
rpt_Organisation_*_Email_Communication
rpt_Organisation_*_Communication (**obsolete**)

Notes:

- These views are generated by the application and will be named to match the "Communication Type" value.
- The old "rpt_Organisation_*_Communication" views will still be available to use but will be marked as obsolete and phased out gradually in future releases.
- If there are similar Communication Type name found in two or more Communication Categories, the rpt_Organisation_*_Communication for that type will not be generated.

Dynamic Data Sections

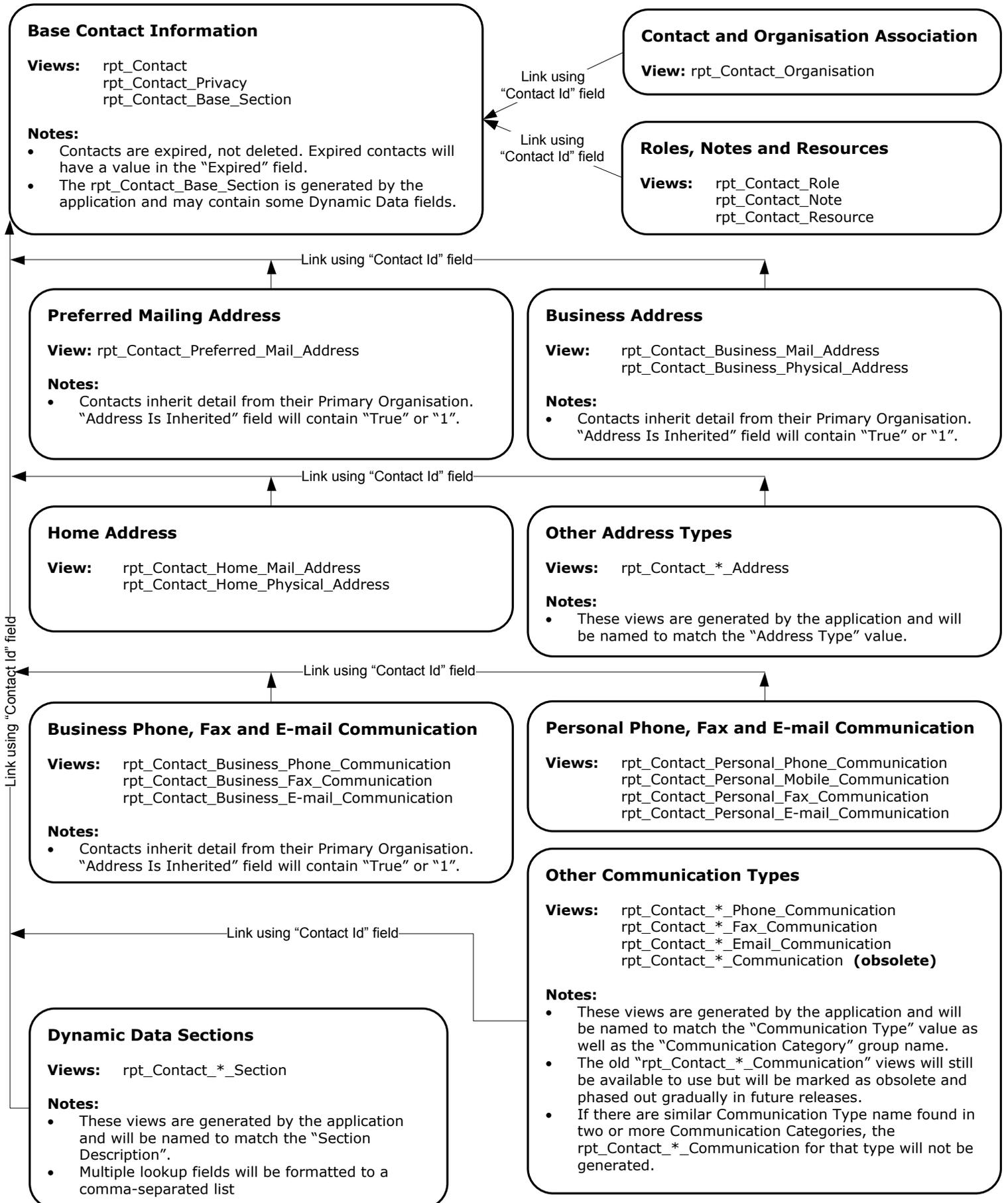
Views: rpt_Organisation_*_Section

Notes:

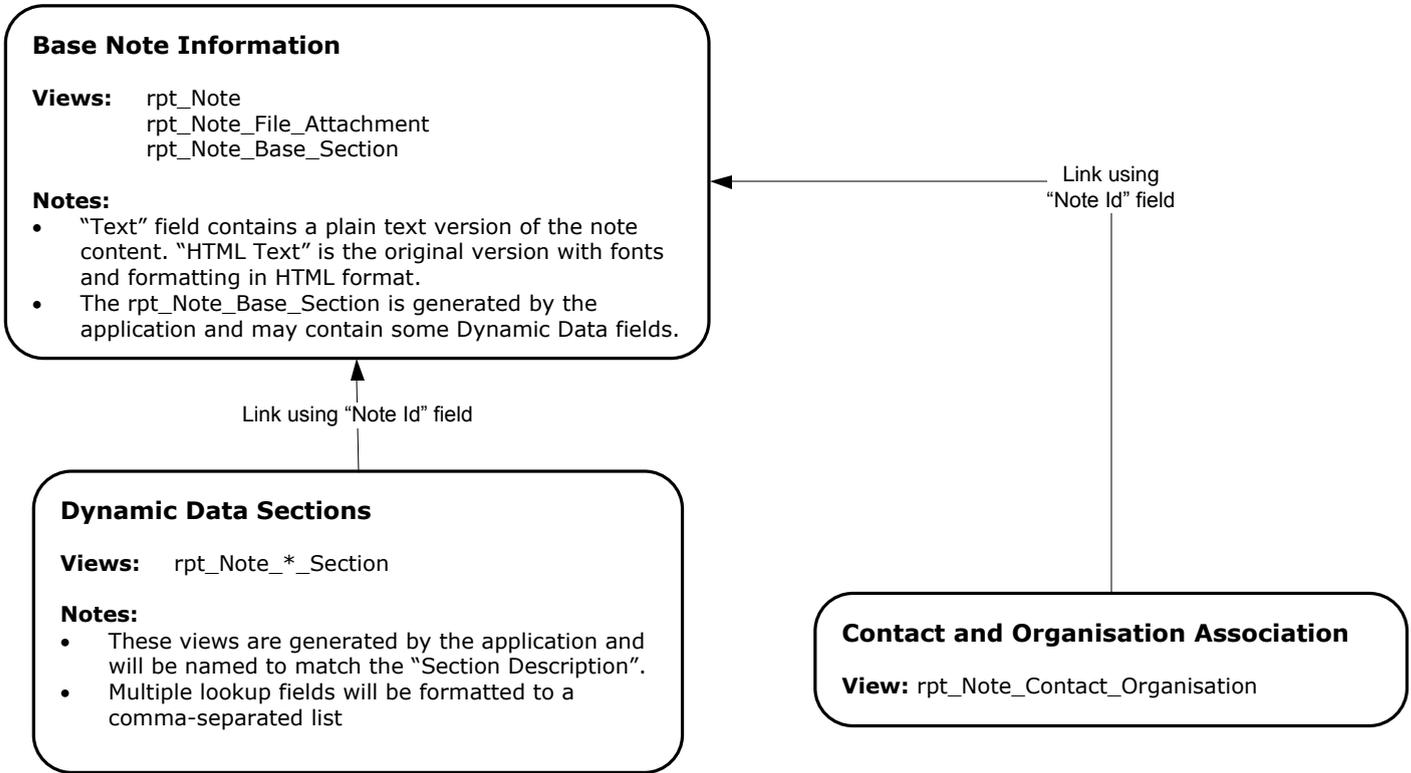
- These views are generated by the application and will be named to match the "Section Description".
- Multiple lookup fields will be formatted to a comma-separated list

Link using "Organisation Id" field

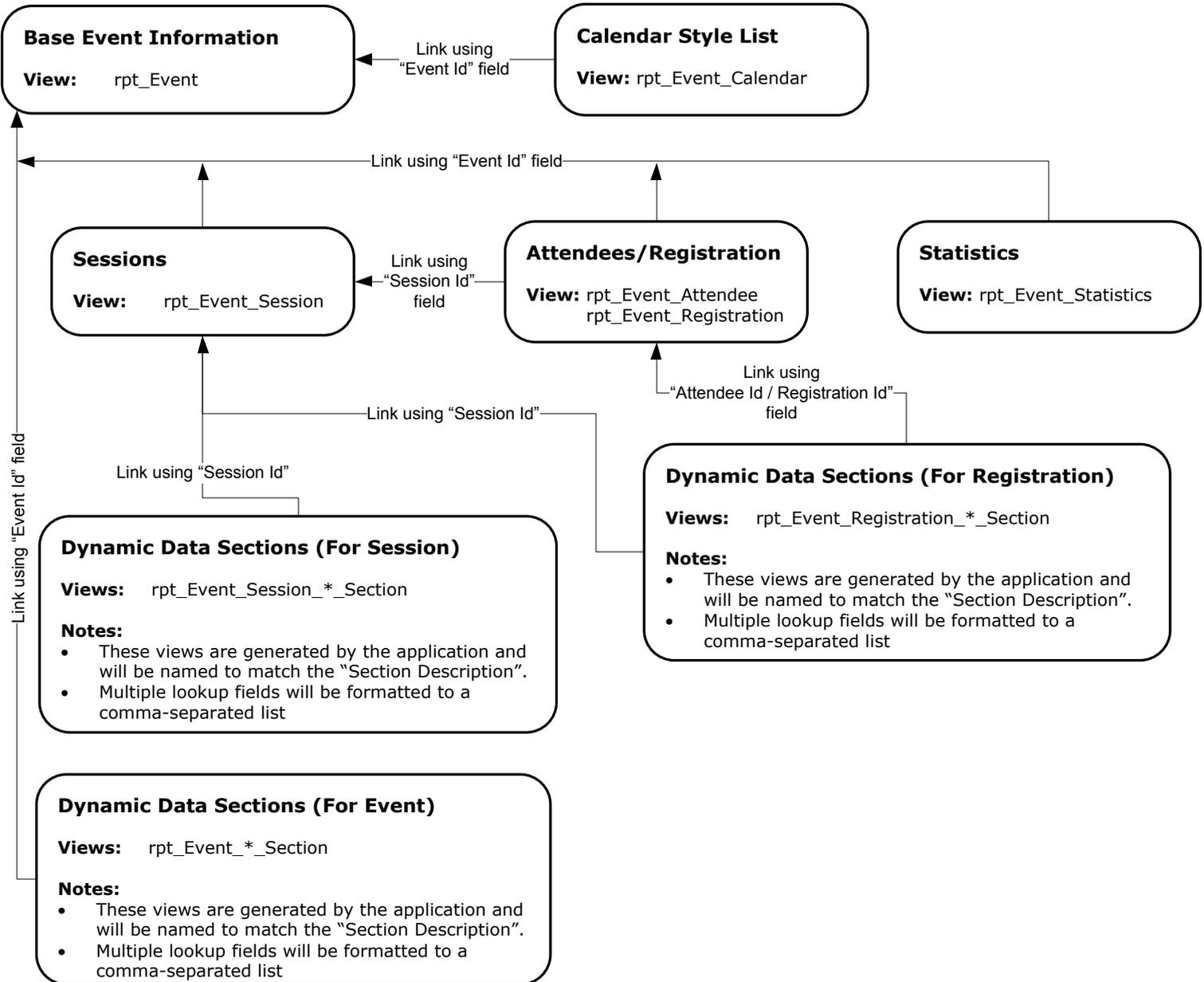
Contact Information



Note Information



Event Information



News

Base News Information

View: rpt_News

Appointments

Base Appointment Information

View: rpt_Appointment

Appointment Attendees

View: rpt_Appointment_Attendee

Link using
"Appointment Id"
field

Link using "Appointment Id" field

Dynamic Data Sections

Views: rpt_Appointment_*_Section

Notes:

- These views are generated by the application and will be named to match the "Section Description".
- Multiple lookup fields will be formatted to a comma-separated list

Distribution Lists

Distribution List Information

View: rpt_Distribution_List

List Members

View: rpt_Distribution_List_Member

Link using
"Distribution List Id"
field

Quick Link

Quick Link Information

View: rpt_Quick_Link

Report Branding

Report Branding Details

View: rpt_Report_Branding

System Information

System Owner Detail

View: rpt_System_Owner

Security Ticket Details

View: rpt_System_Role_Ticket

Link using
"Role Id"
field

Link using "Role Id" field

Role Details

View: rpt_System_User_Role

Link using
"Role Id"
field

User Details

View: rpt_System_User

Survey Module

Base Survey Information

View: rpt_Survey

Responses

View: rpt_Survey_Response

Link using
"Survey Id"
field

Link using "Survey Id" field

Link using "Response Id" field

Questions

View: rpt_Survey_Question

Link using
"Question Id"
field

Answers

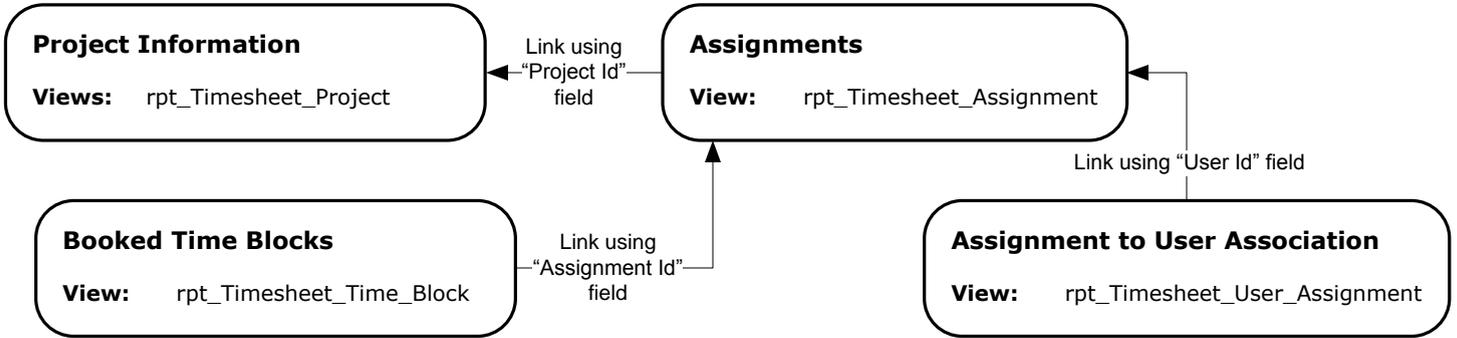
View: rpt_Survey_Answer

Asset Register Module

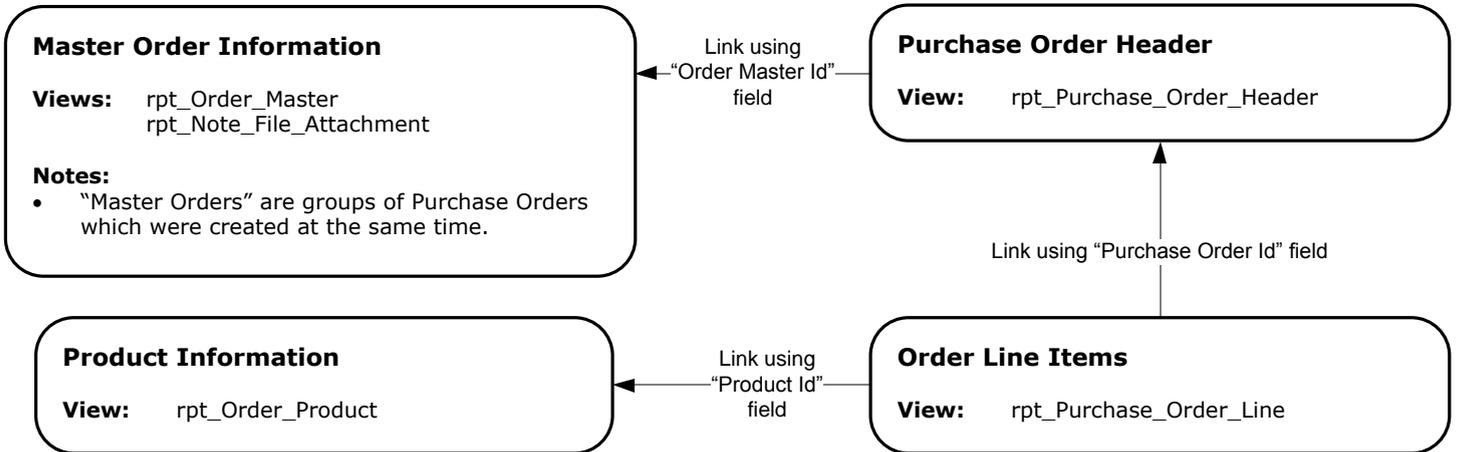
Base Asset Register Information

View: rpt_Asset_Register_Details

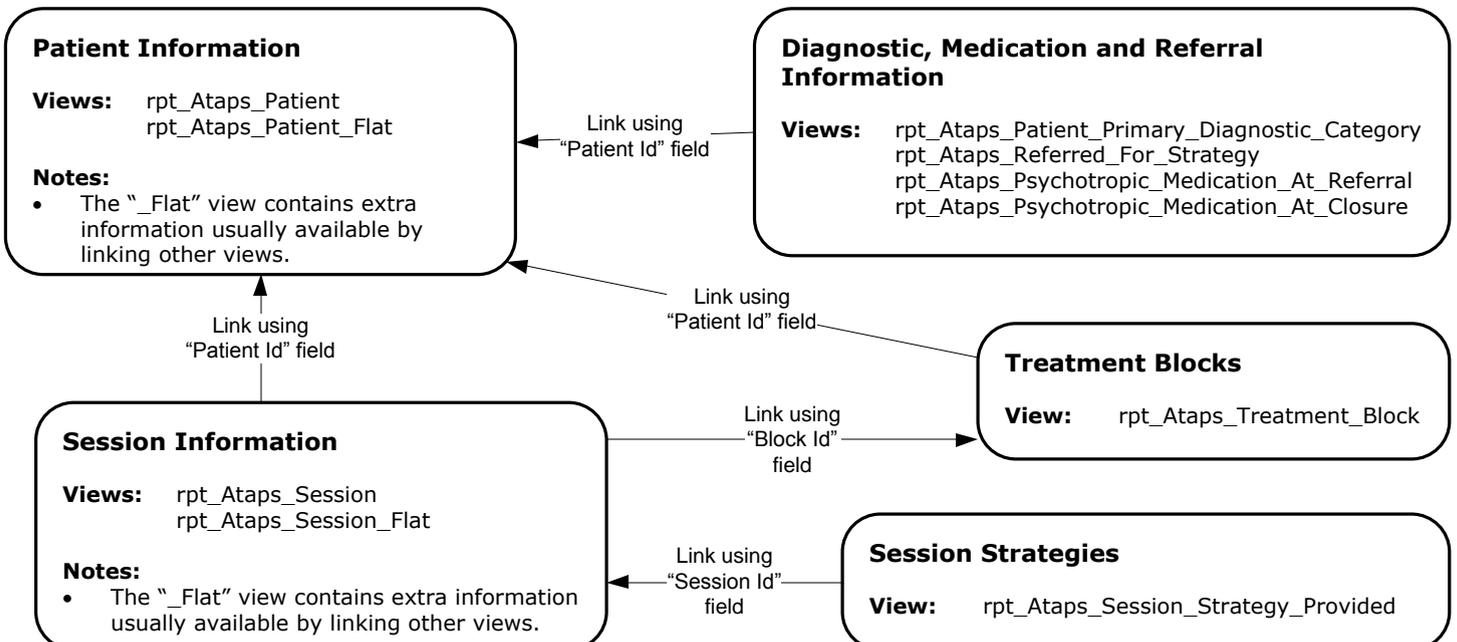
Timesheet Module



Orders Module



ATAPS Module



Data Mining Module

Data Mining module reporting views are automatically generated for every Data Mining Search and Data Mining Data Set item stored in the ChilliDB system.

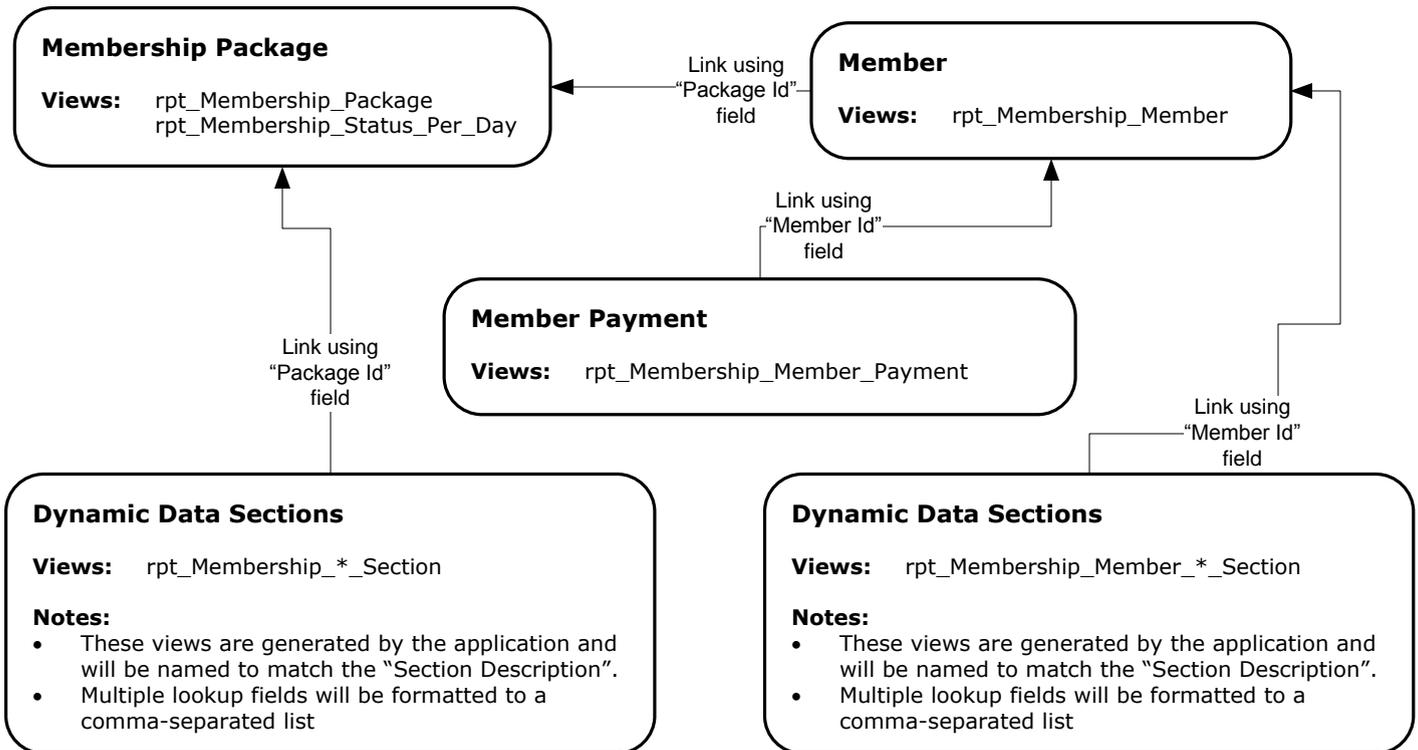
For example:

If you have created a Data Mining Search or Data Set item called "Something", then a reporting view called "rpt_Data_Mining_Something" will be created automatically in the system containing all the reporting field definitions defined for the Data Mining Search item.

Note:

In order to generate the reporting view, you must ensure that the Data Mining Search or Data Set item has at least a Column defined in the Display Columns section (for Data Mining Search screen) or in the Columns section (for Data Mining Data Set screen).

Membership Module



Document Register Module (Previously called Policy Module)

Document Information

Views: rpt_Document_Register_Detail

Notes:

- The old Policy reporting views will remain accessible in the current release. However Polymorphic Solutions recommends that the users should migrate their existing reports in order to use the new Document Register reporting views as the old Policy reporting views will be phased out subsequently.

Policy Internal Information

Views: rpt_Document_Register_Detail_Policy_Internal
(previously called "rpt_Policy_Detail")

rpt_Document_Register_Detail_Policy_Internal_Current_Policy_File
(previously called "rpt_Policy_Detail_Internal_Current_Policy_File")

Policy External Information

Views: rpt_Document_Register_Detail_Policy_External
(previously called "rpt_Policy_Detail_External")

rpt_Document_Register_Detail_External_Response_File
(previously called "rpt_Policy_Detail_External_Response_File")

Using Link
"Document Id"
Field

Correspondence Information

Views: rpt_Document_Register_Detail_Correspondence

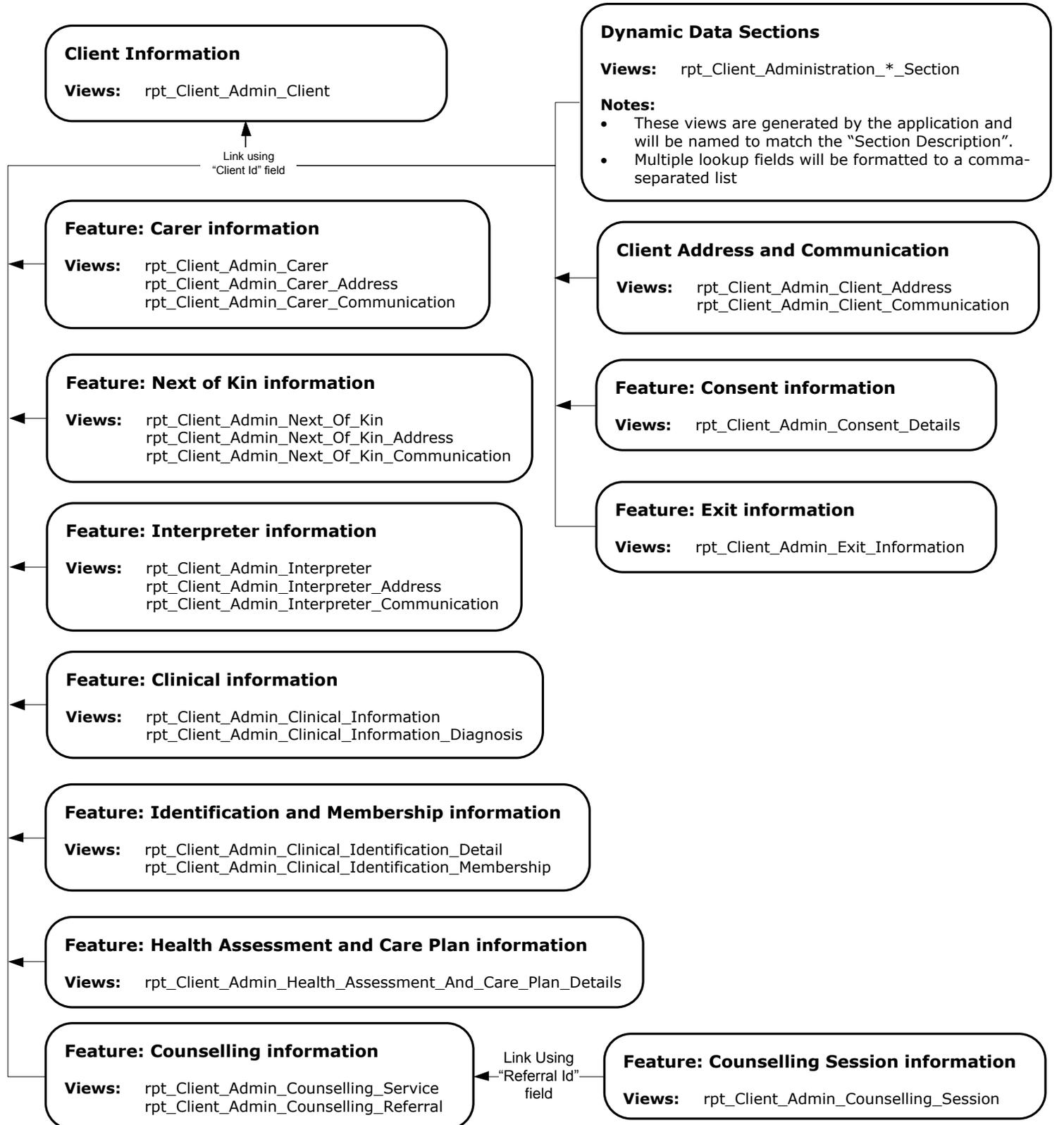
Dynamic Data Sections

Views: rpt_Document_Register_Detail_*_Section
(previously called "rpt_Policy_Detail_*_Section")

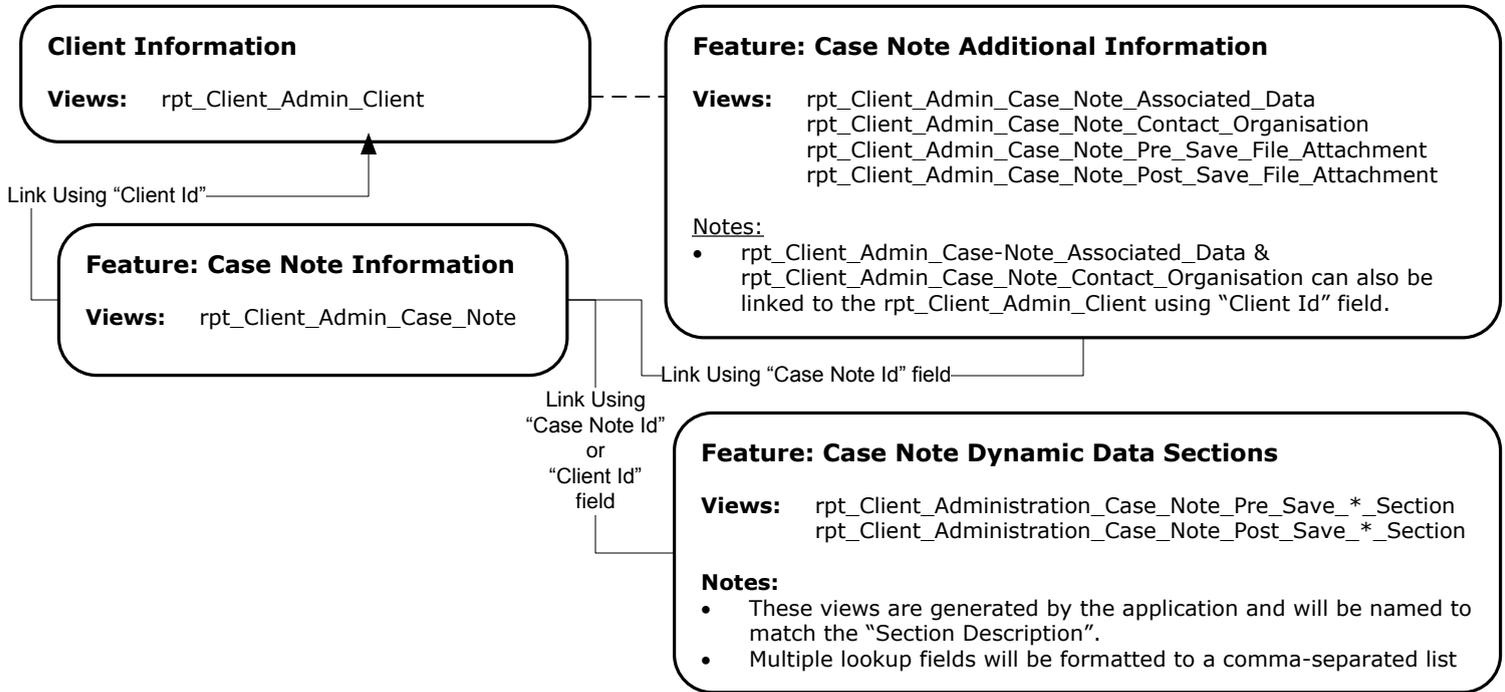
Notes:

- These views are generated by the application and will be named to match the "Section Description".
- Multiple lookup fields will be formatted to a comma-separated list
- Old generated dynamic data reporting views linked to the old Policy module will be replaced by the new reporting views generated under the Document Register module. The users who use the old dynamic data views will need to change their reports to be linked the new generated dynamic data views for Document Register.

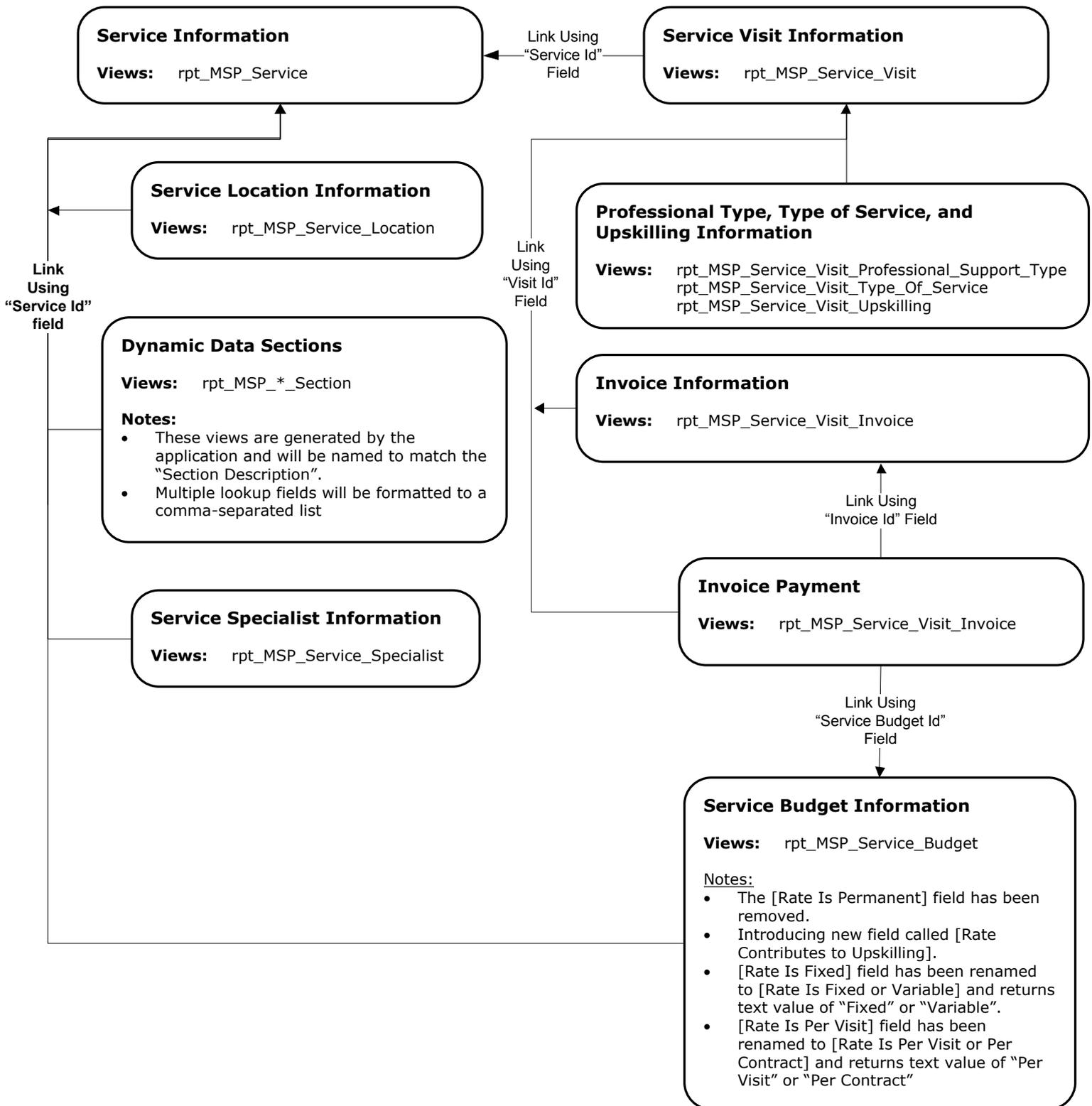
Client Administration Module



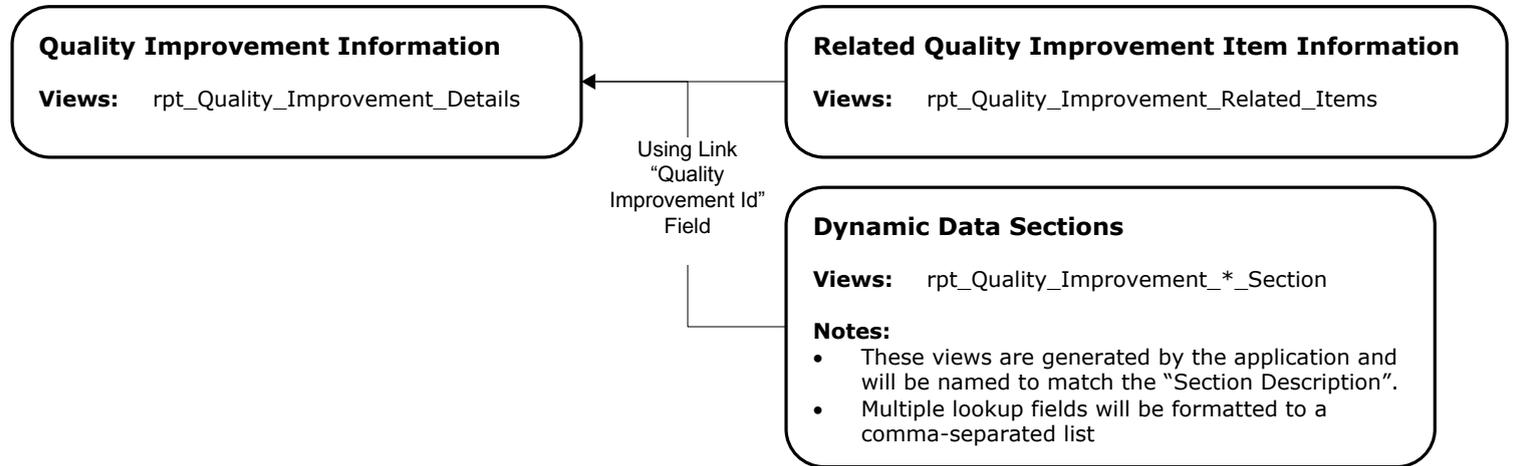
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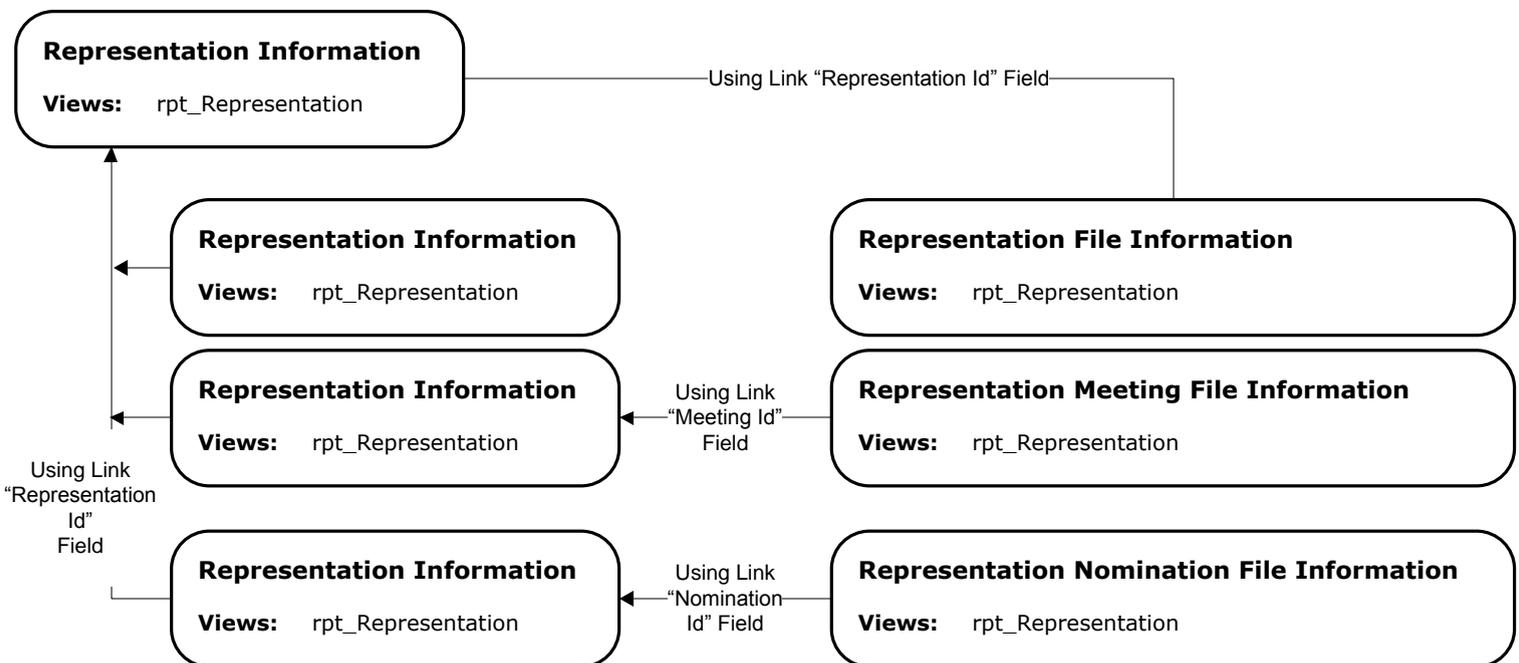
MSOAP Module



Quality Improvement Module



Representation Module



Case Management Module

