



OpenPro Report Builder

Chapter 1

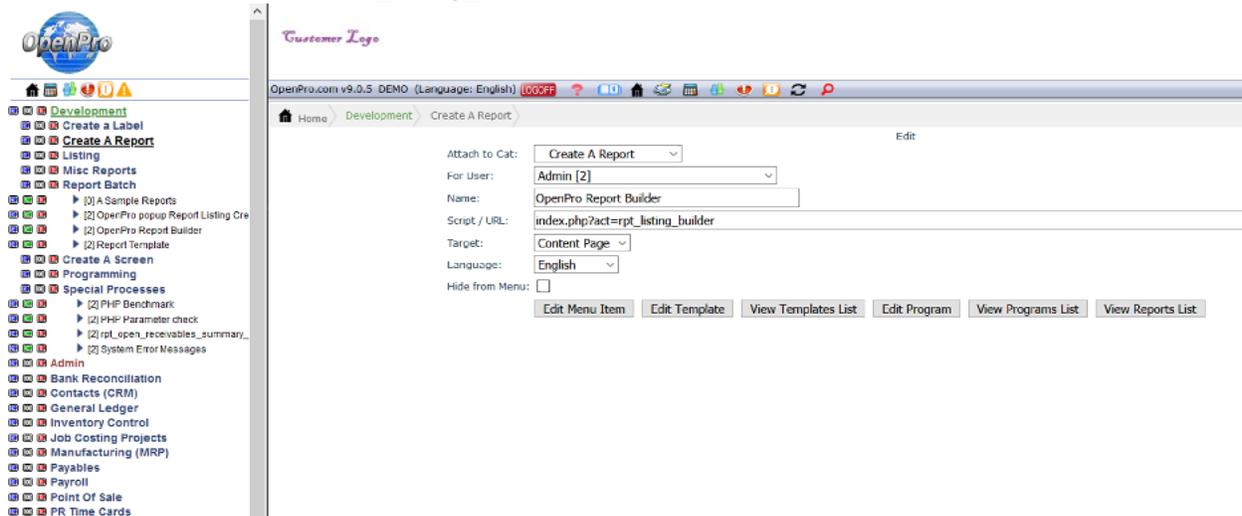
Report Builder Installation Instructions

1. Copy the documents/report_builder folder
2. In the documents folder create a folder reports
3. Add the following to the sqlinfo.php file

```
$reportBuilderConfig = array(  
    'smMenuId' => 10825,  
    'base_url' => 'http://openproURL/openpro',  
    'jsonp' => true  
);
```

Check the database table sm_menu and find out where you want to place the reports. 'smMenuId' is the id of the menu item this will add new reports under. 'base_url' is the base url to the openpro installation.

4. Add a menu item for the report builder
Script Url: index.php?act=rpt_listing_builder





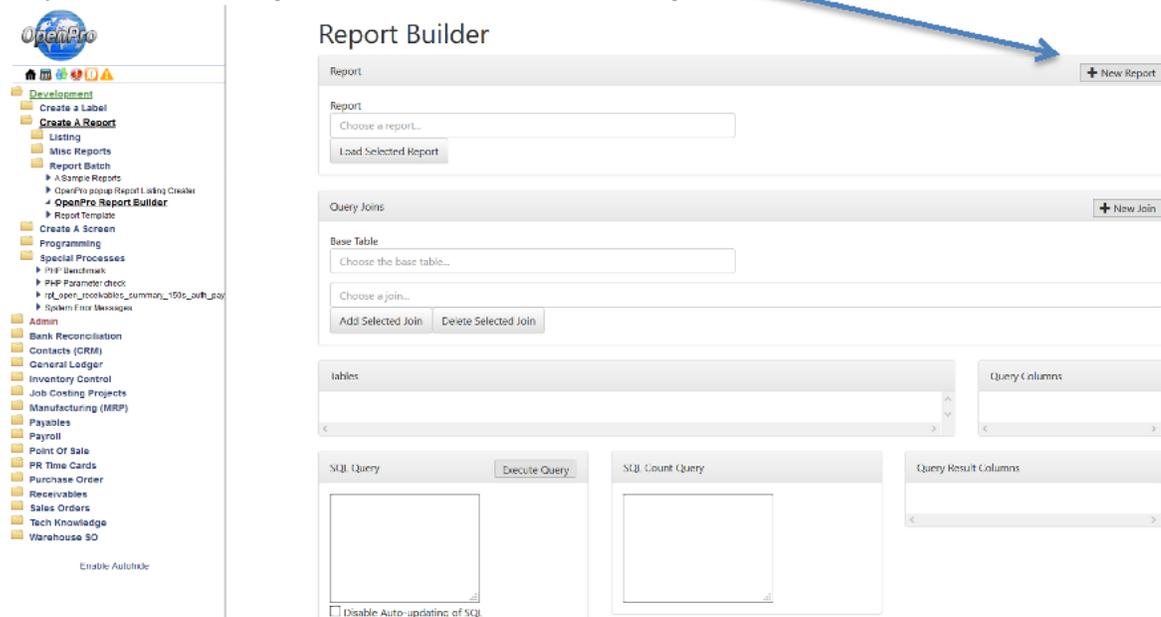
OpenPro Report Builder

Chapter 2

How to use the OpenPro Report Builder

5. Build new reports

Report section – **Step1** - build and **create** a new report



Step2 – Know what systems you want to build and **create the new report**

Creating new reports you need to know what tables you want to get the information from, so first you need to know what system. In OpenPro the tables are prefixed with the System ID in front.

- IC – Inventory control
- PO – Purchase order
- SO – Sales Order
- GL – General Ledger
- AP – Accounts Payable
- AR – Account receivables
- JC – Job costing



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Step3 – Know and select BASE Table

When you click NEW REPORT then click on BASE TABLE.

That will pull up all the table names available.

When you start typing the system name like IC it will pull up all the inventory control tables.

So we will use the IC_item table for that listing



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In this example we will create an item listing

Step4 – Know and select fields from that table, in this example we will just select partnum and name and price 1 and cost 1. So we find the field names and DROP AND DRAG them from the TABLE BOX to QUERY COLUMNS box.

Query Joins + New Join

Base Table
ic_items x

Choose a join...

Add Selected Join Delete Selected Join

Tables

- name
- item_inventory_ty
- acct_inv_class
- ship_reference
- sellable
- taxable
- logo
- description2
- notes
- commission_code

Query Columns

- ic_items.partnum
- ic_items.name

When we have all the fields in the QUERY COLUMN

Tables

- sell_uom
- inv_to_sell_uom_com
- price_1
- price_2
- price_3
- price_4
- price_5
- price6
- price7
- price8

Query Columns

- ic_items.partnum
- ic_items.name
- ic_items.cost_1
- ic_items.price_1

SQL Query Execute Query

```
select
ic_items.partnum,ic_items.name,
ic_items.cost_1,ic_items.price_1
from ic_items
```

Disable Auto-updating of SQL

SQL Count Query

```
select count(*) as cnt from
ic_items
```

Query Result Columns

Step 5 Execute Query button



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STEP 6 after you Execute you can then modify the query, order, column headers, alignments, grouping and more.....

SQL Query Execute Query

```
select
ic_items.partnum,ic_items.name,
ic_items.cost_1,ic_items.price_1
from ic_items
```

Disable Auto-updating of SQL

SQL Count Query

```
select count(*) as cnt from
ic_items
```

Query Result Columns

- partnum
- name
- cost_1
- price_1

Column	Type	Alignment	Field Header (Alias)	Summary Type	Group By	Order By
partnum	string	left	partnum	Type	Group By	ORDER By ✕
name	string	left	name	Type	Group By	ORDER By ✕
cost_1	string	left	cost_1	Type	Group By	ORDER By ✕
price_1	string	left	price_1	Type	Group By	ORDER By ✕

Report Sample Data

partnum	name	cost_1	price_1
FG1008	FG1008 OpenPro Mountain Bike NAME	60.22000	100.00000
FG300	FG300 Custom Mountain Bike	895.22000	1875.00000
FG200	FG200	403.00000	995.99000
RMSHOCK	METAL SHOCK 1300	1.20000	0.00000

As you make the changes to the headers, etc you see the sample report below changing.

Column	Type	Alignment	Field Header (Alias)	Summary Type	Group By	Order By
partnum	string	left	PART	Type	Group By	1 ✕
name	string	left	NAME	Type	Group By	ORDER By ✕
cost_1	string	right	COST	Type	Group By	ORDER By ✕
price_1	string	right	PRICE	Type	Group By	ORDER By ✕

Report Sample Data

PART	NAME	PRICE	COST
FG1008	FG1008 OpenPro Mountain Bike NAME	100.00000	60.22000
FG300	FG300 Custom Mountain Bike	1875.00000	895.22000
FG200	FG200	995.99000	403.00000
RMSHOCK	METAL SHOCK 1300	0.00000	1.20000
FG400	Custom electric Bike	15547.00000	522.84319
RM1001	SHEET METAL	0.00000	120.55000
RM1200	METAL HANDLE	0.00000	12.50000
RMSTEEL	RAW STEEL BARS	0.00000	1.22000
RM1000	RAW SHOCK 1300	0.00000	1.10000



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Step 7 create report search criteria

This is where you can select the fields you want to search for this report.

FG500 FG500 Racing Mountain Bike 50000.00000 1200.00000

Report Search Criteria

Table	Column	Operator	Value	<input type="button" value="Save"/>	<input type="button" value="Delete"/>
ic_items	partnum	operator			

Create Report

Report Name

Report Filename

Create Menu Item

Step 8 – save and create menu item.

The screenshot shows the OpenPro web application interface. On the left is a navigation menu with categories like 'Development', 'Create a Label', 'Create A Report', and 'Created Reports'. The 'Created Reports' section is expanded, showing a list of reports including 'Item Listing by part number'. The main content area displays the report 'Item Listing by part number' with a search bar containing 'partnum' and a 'Search' button. Below the search bar, it shows '92 total results, rows per page: 100' and a table of results.

PART	NAME	PRICE	COST
0B13002	MOTOBICANE FANTOM CROSS PRO	500.00	200.00
1223009	FANTOM CROSS OUTLAW ALUMINUM CYCLOCROSS FRAMSET	500.00	200.00
jlw	#3 lock washer	0.09	0.04
6953-part	6953-part	0.00	0.00
6958-part	6958-part	0.00	0.00
7953-partL	7953-partL	0.00	45.00
ALIS	Azonic 110t Seat	60.00	0.33
AJY192	Amoeba JY-192	25.00	15.00
ALS	Azonic Love Seat	45.00	30.00
APT	Answer Pro Taper	70.00	40.00
ARI A1INCH	Arrow Ratchet 1 launch	20.00	7.00

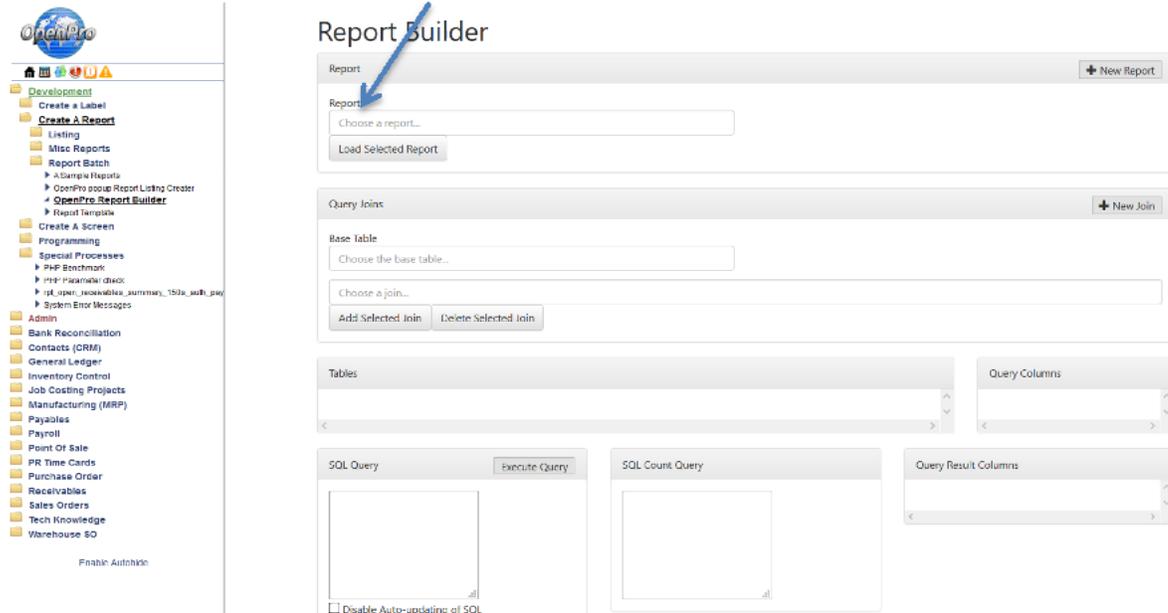
See the new menu item was created and the report is generated.



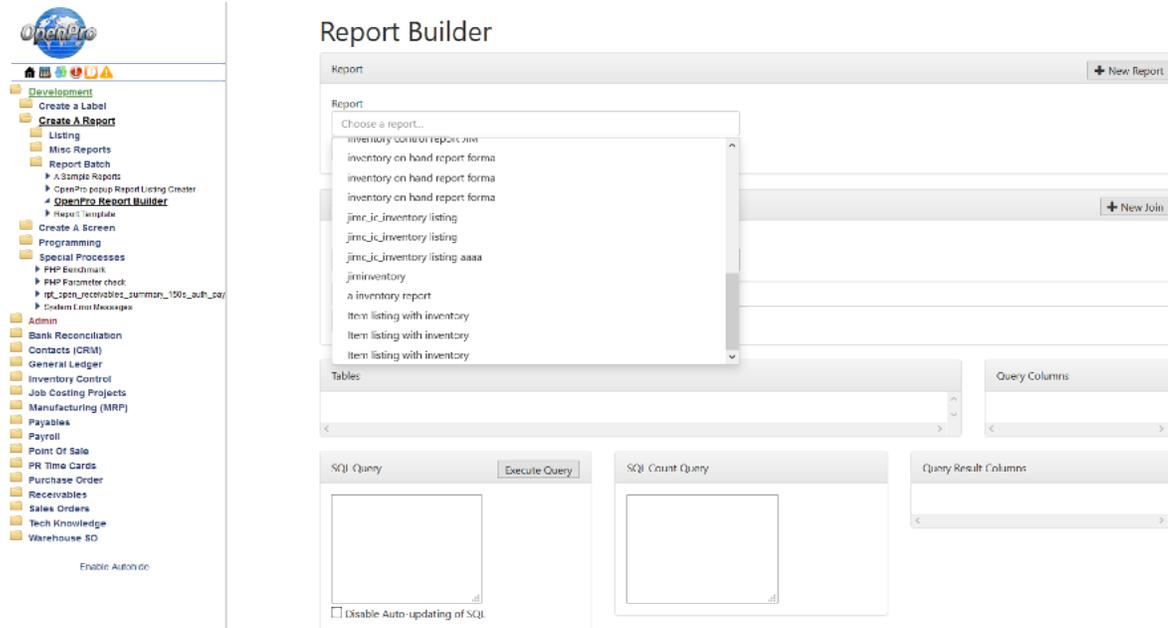
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SELECT AND EDIT AN EXISTING

Report section – where you **select** an existing report or **create a new report**



When you select a report it shows you all the prior reports created in the system.



Select an existing report



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Hit Load Selected report

As it loads you will see it has Query and Joins shows what database and tables used for the report. Tables shows the tables and fields of the tables. The Query Columns shows what fields will show up on the report. SQL Query is the sql created as selecting the columns

Column Name	Type	Alignment	Alias	Summary Type	
partnum	string	left	partnum	Summary Type	X
name	string	left	name	Summary Type	X
cost_1	string	left	cost_1	Summary Type	X
price_1	string	left	price_1	Summary Type	X
quantity	string	left	quantity	Summary Type	X
purchased	string	left	purchased	Summary Type	X

partnum	name	cost_1	price_1	quantity	purchased
RM1001	SHEET METAL	120.35000	0.00000	1.00000	1.00000
I12703	I-G200 Deluxe Mountain Bike	400.00000	995.00000	40.00000	40.00000
FG200	FG200 Deluxe Mountain Bike	400.00000	995.00000	1.00000	1.00000
RM1200	METAL HANDLE	12.30000	0.00000	183.00000	105.00000
RMSTEEL	RAN STEEL BARS	1.22000	0.00000	375.62000	375.62000

Display Columns you can change the type, alignment and Alias (column header name) and summary type.

Report Search Criteria – to limit the records when selecting.



OpenPro Report Builder



- Development
 - Create a Label
 - Create A Report**
 - Listing
 - Misc Reports
 - Report Batch
 - A Sample Reports
 - OpenPro -> misc -> Report1 listing Creator
 - OpenPro Report Builder**
 - Report Template
 - Create A Screen
 - Programming
 - Special Processes
 - PHP Benchmark
 - PHP Parameter check
 - rpt_open_receivables_summary_150s_suth_pay
 - System Error Messages
 - Admin
 - Bank Reconciliation
 - Contacts (CRM)
 - General Ledger
 - Inventory Control
 - Job Costing Projects
 - Manufacturing (MRP)
 - Payables
 - Payroll
 - Point Of Sale
 - PR Time Cards
 - Purchase Order
 - Receivables
 - Sales Orders
 - Tech Knowledge
 - Warehouse SO
- Enable Autoload

RM2001X4	RAW WOOD 1 X 4	3.44000	0.00000	1.00000	1.00000
RM1001	SHEET METAL	120.55000	0.00000	1.00000	1.00000
FG500	FG500 Racing Mountain Bike	1200.00000	50000.00000	2.00000	1.00000
FG100	FG100 OpenPro Mountain Bike ...	3985.03898	100.00000	2186.00000	2186.00000
FG100	FG100 OpenPro Mountain Bike ...	3985.03898	100.00000	1.00000	1.00000

Report Search Criteria + New

Table	Column	Operator	Value	Save	Delete
ic_items	partnum	like			

Create Report

Report Name
Item listing with inventory

Report Filename
e inventory report

Create Menu Item

Create Report File Save

Success

Create report Report Name is the header of the report.

Report file name is the php report file name created for the menu
Check mark for Create Menu item it will create the menu item on the screen
Create report file will be the name.



OpenPro Report Builder

Running the new report from the menu
This is the same Item Listing with Inventory

Search criteria on the items.

When you search you and you have the LIKE option on the search then you put in a few letters and it will get you all the part numbers with those letters.

The screenshot shows the OpenPro web interface. On the left is a navigation menu with categories like Development, Create A Report, Listing, Misc Reports, Report Batch, Create A Screen, Programming, Special Processes, Admin, Bank Reconciliation, Contacts (CRM), General Ledger, and Inventory Control. The main content area is titled 'Item listing with inventory' and features a search bar with the text 'partnum'. Below the search bar, it indicates '23 total results, rows per page: 100'. A table displays the search results with columns for Item, Description, cost, price_1, quantity, and purchased.

Item	Description	cost	price_1	quantity	purchased
MYKIT	Make this bike as a KIT	10.00	500.00	1.00	
MYKIT	Make this bike as a KIT	10.00	500.00	100.00	
MYOB	Make your own bike	290.00	500.00	6.00	
MYOBNS	Make your own bike Not Ser	55.55	500.00	0.00	-
MYOBNS	Make your own bike Not Ser	55.55	500.00	44.00	
MYOBNS	Make your own bike Not Ser	55.55	500.00	-14.00	
MYOBS	Make your own bike Serialized	44.77	500.00	1.00	
MYOBS	Make your own bike Serialized	44.77	500.00	1.00	
MYOBS	Make your own bike Serialized	44.77	500.00	1.00	
MYOBS	Make your own bike Serialized	44.77	500.00	1.00	
MYOBS	Make your own bike Serialized	44.77	500.00	1.00	
MYOBS	Make your own bike Serialized	44.77	500.00	1.00	
MYOBS	Make your own bike Serialized	44.77	500.00	1.00	
MYOBS	Make your own bike Serialized	44.77	500.00	1.00	
MYOBS	Make your own bike Serialized	44.77	500.00	1.00	
MYOBS	Make your own bike Serialized	44.77	500.00	1.00	
MYOBS	Make your own bike Serialized	44.77	500.00	1.00	
MYOBS	Make your own bike Serialized	44.77	500.00	1.00	
MYOBS	Make your own bike Serialized	44.77	500.00	1.00	
MYOBS	Make your own bike Serialized	44.77	500.00	1.00	
MYOBS	Make your own bike Serialized	44.77	500.00	1.00	
MYOBS	Make your own bike Serialized	44.77	500.00	1.00	
MYOBS	Make your own bike Serialized	44.77	500.00	1.00	
MYOBS	Make your own bike Serialized	44.77	500.00	1.00	

You can click on the column headers and it will sort the report by those field headers.