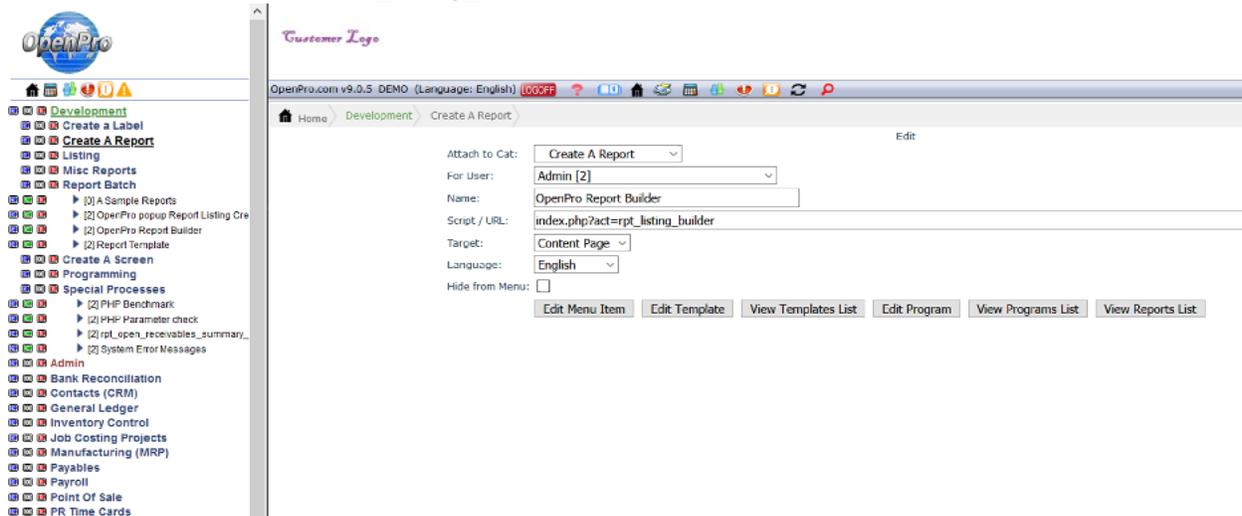**OpenPro Report Builder**

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**
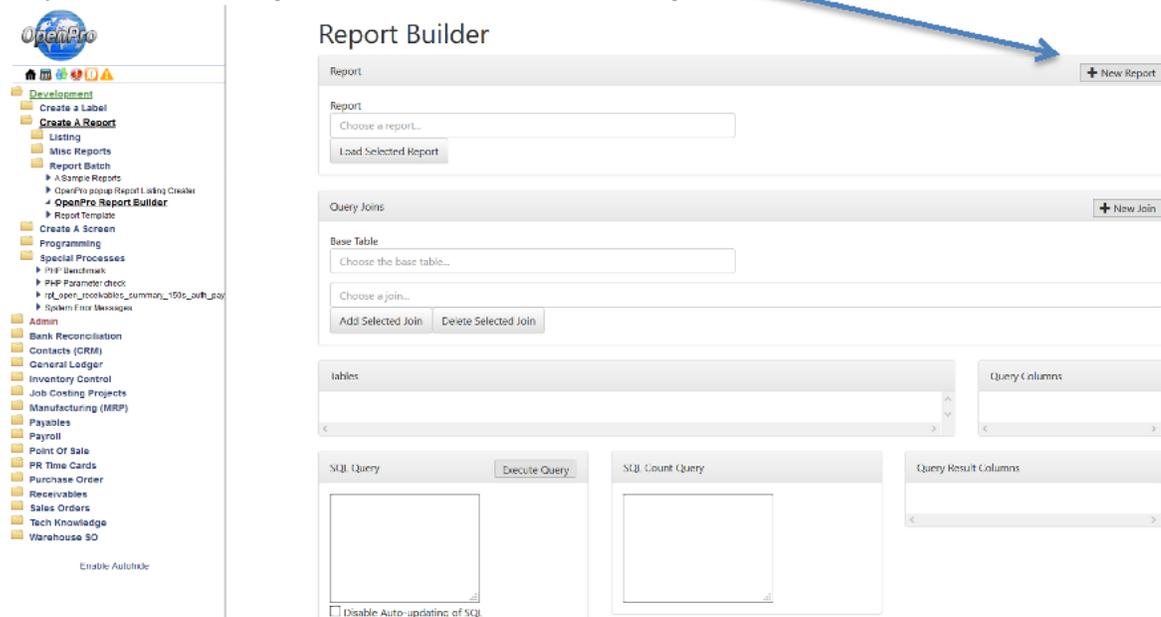   Script Url: index.php?act=rpt_listing_builder

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

OpenPro Report Builder

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

OpenPro Report Builder

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.

When we have all the fields in the QUERY COLUMN

Step 5 Execute Query button

OpenPro Report Builder

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

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

OpenPro Report Builder

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   **+ New**

Table	Column	Operator	Value	
ic_items	partnum	operator		💾 Save ✖ Delete

Create Report

Report Name

Item Listing by part number

Report Filename

item listing part

☑ Create Menu Item

[Save Report & Create Menu Item] [Save this report]
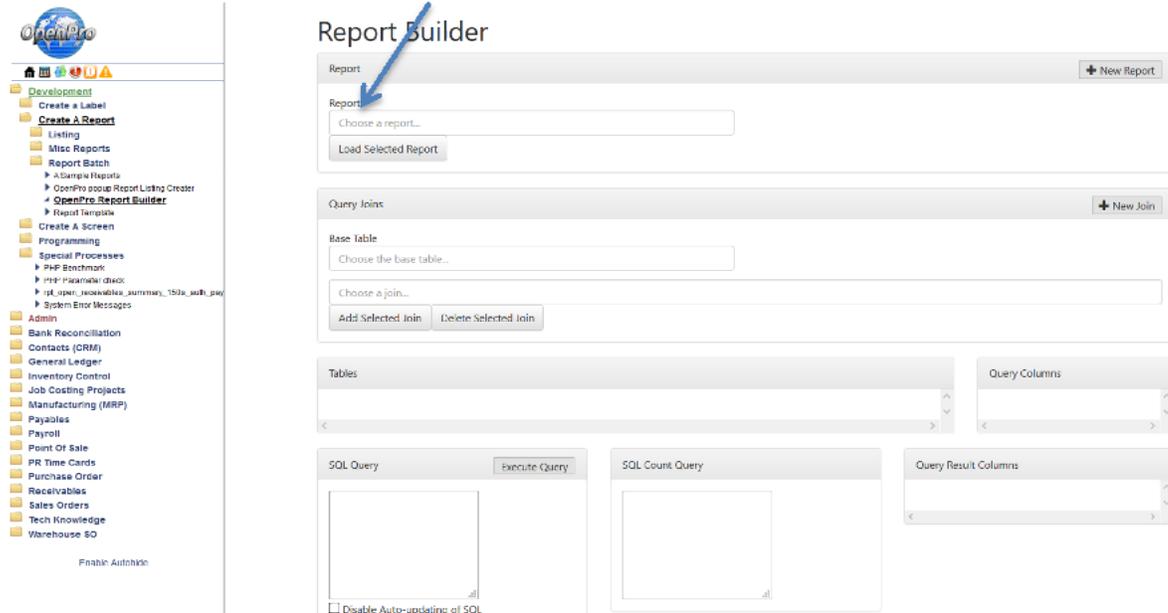
Step 8 – save and create menu item.

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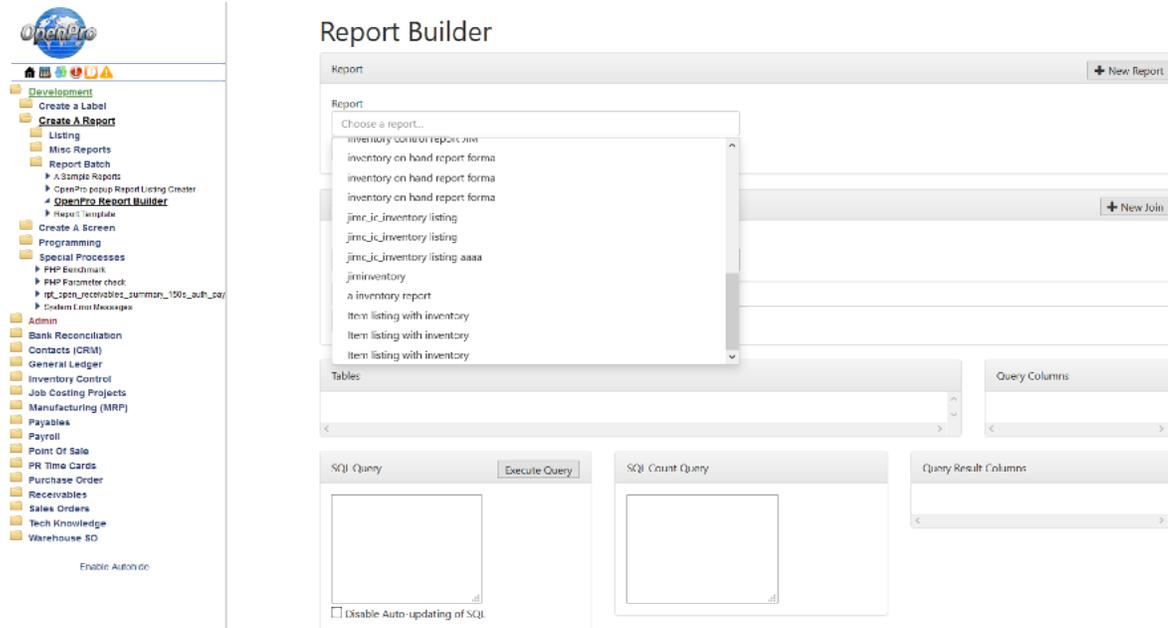
OpenPro Report Builder

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

OpenPro Report Builder

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

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

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	
ic_items ⌄	partnum ⌄	like ⌄		🖫 Save ✖ Delete

Create Report

Report Name

Item listing with inventory

Report Filename

a 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.

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