



How to Create a Custom Report

This job aid explains how to create a custom report in IQNavigator. There are two types of reports – system reports and custom reports. Custom reports give IQN users the ability use predefined data/reporting sources to create ad hoc reports and data extracts. System reports are reports that are created by an administrator or program office. A user can clone a system report to create a new ad hoc report or they can submit (i.e., “run”) a system report to produce a report output. System reports can only be edited or deleted by the report owner.

Reports Menu: Selection List Options

Report Output

Select this menu option to view a list of reports that are currently running, were successfully generated, were canceled, or were terminated. Click the Report ID hyperlink in the Reports list to open the report. Reports in the list have been generated within the previous 35 days. IQNavigator automatically purges reports after 35 days. If you want to retain a copy for later viewing, you will need to save the report to your computer or one of your system network folders.

Scheduled Reports

Select this menu option to view a list of reports that you are scheduled to receive. The reports list includes the Report Name, Scheduled Start Date/Time, and Frequency. Click 'Delete' in the Actions column to remove a report from your list.

Reports

Select this menu option to view a list of system or custom reports. This option also includes the link that lets you create a custom ad hoc report. Ad hoc reports can be saved as custom reports for personal use or to share with other IQNavigator users.

To search for existing reports:

1. Log in to IQNavigator using your *user name* and *password*. Your Home dashboard displays.
2. Hover over the **Reports** tab in the Header Menu bar and click **Reports**. The Reports list screen displays with a list of available system and custom reports based on your user role. *Optional:* Use



one of your dashboard “Reports” hyperlinks (e.g., custom reports, view report output, expiring reports) for direct access to various system reports lists.

The screenshot shows the My IQN dashboard with a navigation menu on the left and a main content area. The navigation menu includes sections for Activities, System Updates, Job Matches, Work Orders, Resources, Reports, and User Profile. The Reports section is highlighted, and a red arrow points to the 'Reports' link in the navigation menu. Another red arrow points to the 'Reports' link in the top navigation bar. A third red arrow points to the 'Expiring Reports' link in the right-hand status panel.

3. Review the list to become familiar with the columns as well as the filter, search, and display options that are located above the Reports list.

The screenshot shows the Reports list page. At the top, there is a filter dropdown set to 'all reports', a search bar, and a 'Results per Page' dropdown set to 50. Below this, a table lists various reports. The table has columns for Name, Description, Data Source, Owner, Last Run Date, and Actions. The reports listed include 'Shell Supplier Invoice Reconciliation Report (Supplier) by DATE', 'Supplier Project Manager Report', 'Contractor Contact Info - BR', 'Recon Report', and 'Invoice reconciliation by date (SOURCE)'. Each report has a 'submit' button and a right arrow icon in the Actions column.

Name	Description	Data Source	Owner	Last Run Date	Actions
Shell Supplier Invoice Reconciliation Report (Supplier) by DATE		Shell-FO Invoicing Details (supplier organization)	system report		submit →
Supplier Project Manager Report		User List Audit (supplier organization)	system report		submit →
Contractor Contact Info - BR	For Business Resiliency	Assignment Summary (supplier organization)	system report		submit →
Recon Report		FO Invoicing Details (supplier organization)	org unit report;		submit →
Invoice reconciliation by date (SOURCE)		Shell-FO Invoicing Details (supplier organization)	org unit report;		submit →

Columns (left to right):

Name: This is the name assigned to the report by the user who created the report. If you are the report creator, the report name will display as a hyperlink.

⚠ The Reports list uses a UNICODE sort order for the Name column. This means that any report name that begins with a special character (e.g., an asterisk) will display at the top of the list. Report




names that begin with a number, such as a calendar year, will display next, followed by report names that begin with letters. Report names that begin with letters will sort in alphabetical order.

Description: The description should explain the contents as well as the intended use of the report. This information is especially helpful if you are creating a report that you intend to share with other system users.

Data Source: This identifies which dataset (i.e., combination of data fields) was used to create the report.

Owner: The owner is the individual who created the report. The owner can set the availability of reports they create to “My Reports” (report will be limited to personal use) or “Organization Reports” (report usage can be shared with other users.)

Last Run Date: Indicates when you last ran the report.

 Some fields may include advisory information for system users. Always check the “Description” and the “Owner” fields for special instructions about usage, restrictions, or limitations.

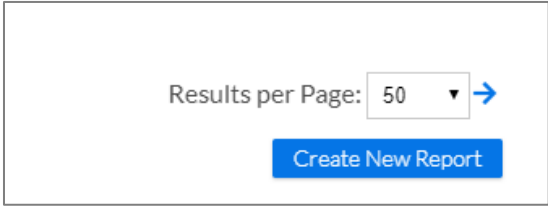
Actions: This column includes a pull-down selection list of all the possible actions you can take specific to a report. These include:

- **Clone:** Allows you to create your own ad hoc report based on an existing report.
- **Delete:** Allows you to remove an existing report. **NOTE:** You can only delete reports you created (i.e., My Reports).
- **Edit:** Allows you to make changes to an existing report. **NOTE:** You can only edit reports you created but you can clone a system report and then edit the cloned version.
- **Show SQL:** Allows you to view the structured query language (SQL) that was used in a specific report.
- **Submit:** Allows you to run a report in order to produce results (i.e., report output).

To create a new report:

Complete Steps 1 and 2 as listed above.

3. Click the **create new report** tab () located in the Reports header row. The New Custom Report screen displays with the **Select Columns** tab active.



Results per Page: 50 ▾ →

Create New Report



My IQN ▾ Jobs ▾ Projects ▾ Resources ▾ Work Orders/Assignments ▾ Time/Expense ▾ Reports ▾ Invoicing ▾ Set Up ▾

New Custom Report

1 Select Columns 2 Format Report 3 Filters/Parameters 4 Save & Submit Report


Actions: Cancel Next

1 Select Columns First, select a report data source, then select and order the columns for your report.

Data Source: <-- select value --> ▾

Available Columns		Selected Columns
<div></div>	>>	<div></div>
	>	
	<	
	<<	
		⬆ ⬇ ⬇ ⬆

Actions: Cancel Next

 Notice that there are four separate tabs to create a new report; 1. Select Columns, 2. Format Report, 3. Filters/Parameters, and 4. Save & Submit Report. These tabs **MUST BE COMPLETED** in the order in which they are numbered. In addition, the data fields on each tab must be completed in order from TOP to BOTTOM. Depending on the data field entries or selections you make, additional data fields and/or selection options will be revealed so it is important that you complete the fields in the correct order. Validation checks are embedded throughout these tabs. Take care to follow the instructions in any validation pop-up window that displays as you work through the tabs.



Tab 1: Select Columns

My IQN ▾ Jobs ▾ Projects ▾ Resources ▾ Work Orders/Assignments ▾ Time/Expense ▾ Reports ▾ Invoicing ▾ Set Up ▾

New Custom Report

1 Select Columns 2 Format Report 3 Filters/Parameters 4 Save & Submit Report

Actions: [Cancel](#) [Next](#)

1 Select Columns First, select a report data source, then select and order the columns for your report.

Data Source: [Assignment Summary \(supplier organization\)](#) ▾

Description: The Assignment Summary data source includes information relating to Assignments. This data source includes information about Assignments starting after a specific date or all Assignments for a specific hiring manager. Reports will return one row for each assignment. That row will show information about the more recent version of the assignment. To find information on past Assignment versions, please use the Assignment Detail data source.

Available Columns		Selected Columns
Customer Manager Middle Name		Buyer Organization Name
Date - Assignment Actual End Date		Agreement Type
Date - Assignment Actual End Date(This field)	»	Amendment in Process #
Date - Assignment Planned End Date	>	CAM First Name
Date - Background Check Completion Date		Current Contractor Full Name
Date - Cost Allocation Code 1 End Date	<	Date - Assignment Start Date
Date - Cost Allocation Code 1 Start Date	<<	

Double click on the item for the help description or click [download](#) for a full list of all help.

Actions: [Cancel](#) [Next](#)

- **Data Source** – Use the pull-down selection list to choose the Data Source you want to use to create your report. A Data Source is a combination of data fields related to a category or system process in IQNavigator. Once you pick your Data Source, the Available Columns selection box displays the fields to match your Data Source.
 - **Description** – This section provides helpful advice and tips specific to the Data Source you select.
 - **Available/Selected Columns** -- Use the buttons **between** the two selection boxes to create your Selected Columns list. The Available list includes all data fields from the selected Data Source. The Selected list should include all data fields you want to include in your report. Use the buttons **beneath** the Selected Columns list to arrange the data fields into the display order you want in your report.
 - **Help** – Double click on any item in the selection list for a description or click the download hyperlink for a list (including descriptions) of all fields included in the Data Source.
4. Click **next** in the **Actions** section to advance to the Format Report tab.



Tab 2: Format Report

My IQN ▾ Jobs ▾ Projects ▾ Resources ▾ Work Orders/Assignments ▾ Time/Expense ▾ Reports ▾ Invoicing ▾ Set Up ▾

New Custom Report

1 Select Columns 2 Format Report 3 Filters/Parameters 4 Save & Submit Report

Actions: Cancel Back Next

2 Format Report: Choose report sorting, column headers, and display options.

Selected Columns	Column Heading to Display (optional)	Sort Priority	Sort Direction	Display Column Total	Display Column
Buyer Organization Name		1 ▾	Ascending ▾	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Agreement Type		2 ▾	Ascending ▾	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Amendment In Process #		3 ▾	Ascending ▾	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CAM First Name		▾	Ascending ▾	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Current Contractor Full Name		▾	Descending ▾	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Date - Assignment Start Date		▾	Descending ▾	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Display Total Count of Records Returned: ☐ Yes ☒ No
Hide Duplicate Rows Returned (Data Roll-Up): ☒ Yes ☐ No
Display Report Heading: ☒ Yes ☐ No
Display Column Headings: ☒ Yes ☐ No

Actions: Cancel Back Next

- **Selected Columns** – This column lists all the data fields you selected on the previous tab.
- **Column Heading to Display** – Enter the label you want to use on your report if you want to use a label that is different from the Data Source list.
- **Sort Priority** – Use the selection list to set the sort order for each data field (e.g., 1st, 2nd, etc.) **NOTE:** This controls the display of data within a column. The arrangement of one column to another is controlled by the Selected Columns settings made on the first tab. To reduce the amount of time it take to produce the report output, only use the **minimum** number of column sorts that you need.
- **Sort Direction** – Use the selection list to indicate if your report results should list in ascending or descending order. This will be numeric, date order, or alphabetical depending on the content. ASCENDING will be 1, 2, 3, 4... or a, b, c, d... DESCENDING will be 4, 3, 2, 1... or d, c, b, a...
- **Display Column Total** – *Optional for numeric data.* Use the checkbox to indicate if you want to include a “total” cell at the end of a column of numeric data.
- **Display Column** – Use the checkbox to indicate if the selected column should be visible in the final report output.

And the settings at the bottom of the screen:

- **Display Total Count of Records Returned** – Set this to “yes” for longer reports where the output cannot be viewed/printed on a single screen/page.
- **Hide Duplicate Rows Returned (Data Roll-Up)** – Use this option to display duplicate rows of the same data as a single row.
- **Display Report Heading** – Use the checkbox to indicate whether you want to include a report heading in your report output. This typically includes the report title, the user who generated the report, and the date/time the report was run.



- **Display Column Headings** – Use the checkbox to indicate whether you want to include column headings in your report output. Options will vary depending on the data source field so take care when making your selections. This will either be the label from the Data Source or the column heading you manually entered in the section above.

5. Click **next** in the **Actions** section to advance to the Filters/Parameters tab.

Tab 3: Filters/Parameters

New Custom Report

1 Select Columns 2 Format Report 3 Filters/Parameters 4 Save & Submit Report

Actions: Cancel Back Next

3 Filters/Parameters Choose the filtering criteria for your report.

#	Parameter?	Data Element	Operator	Value	Case Sensitive
1	<input type="checkbox"/>	<-- select value -->			
2	<input type="checkbox"/>	<-- select value -->			
3	<input type="checkbox"/>	<-- select value -->			

Add Another Filter

Display Filters on Report: ☒ Yes ☐ No

Statement: Validate

Actions: Cancel Back Next

- **Parameter** – Use the checkbox if you want the ability to change the operator and the value of the selected data element each time you <submit> (i.e., run) the report.
- **Data Element** – Use this feature to select fields that you want to narrow down in your report output. Make you selection from the drop-down list then use the selection boxes to identify the filters you want to use for the selected field. Follow the system prompts to define your filter parameters.



New Custom Report

1 Select Columns 2 Format Report 3 Filters/Parameters 4 Save & Submit Report

Actions: Cancel Back Next

3 Filters/Parameters Choose the filtering criteria for your report.

#	Parameter?	Data Element	Operator
1	<input type="checkbox"/>	Buyer Organization Name	
		Available	Selected
		DO NOT USE Shell Global Solutions Internati	>>
		Do Not Use Shell Downstream Int B.V.	>
		DO NOT USE Shell Research Limited (OLD)	>
		eSC (euroShell Cards B.V.)	<
		NAM B.V. (NEDERLANDSE AARDOLIE MA	<<
		SA Belgian Shell NV	
		Shell Aircraft Ltd	

2 ☐ Date - Assignment Start Date

3 ☐ <-- select value -->

Add Another Filter

Display Filters on Report: ☒ Yes ☐ No

Statement: 1 AND 2

Validate

<-- select value -->

- <-- select value -->
- between
- for a period
- less-than
- less-than or equal
- greater-than
- greater-than or equal
- equal
- not equal
- empty
- not empty

⚠ Take care to navigate through this screen from top to bottom AND left to right without skipping any fields since filter options are specific to individual fields and are only revealed based on the prior selections you make! As shown in the example above, the Data Element chosen for Parameter 1 displays a selection box setup but the Data Element chosen for Parameter 2 displays a pull-down selection list. Based on the selection you pick, there could be more format option choices you need to make and these will display to the right of the pull-down selection list.

- **Operator** – Use the drop-down selection list to choose which “operator” function you want to use to refine your report results. This feature is optional based on the type/format of the data element you select.
- **Value** – Your options will be specific to the type of Operator you selected. Follow the system prompts and settings carefully.
- **Case Sensitive** – Use the checkbox to specify whether the text in the report output should match the text case stored in the database.
- **Display Filters on Report** – Use the Yes/No radio buttons to indicate whether the report filters should be visible on the final report.
- **Statement** – The Statement field auto-populates content based on the filters/parameters settings you create. It represents how the filters/parameters you select are applied to determine the report output. IQNavigator automatically validates the Statement as you navigate through the custom report wizard. You can also validate at any time by clicking the validate button located at the end of this field. For more details, click the “help” link (?) for this field.

6. Click **next** in the **Actions** section to advance to the Save & Submit Report tab.



Tab 4: Save & Submit Report tab

New Custom Report

1 Select Columns 2 Format Report 3 Filters/Parameters 4 Save & Submit Report

Actions: Cancel Back Save To List Save & Submit

4 Save & Submit Report Name and save your report.

Name:

Description:

Output Template: No file chosen

Output Format:

Availability: ☒ My Reports ☐ Organization Reports

Profile SQL Performance: ☐ Yes ☒ No

Transfer report: ☒ No ☐ FTP ☐ SFTP ☐ FTPS

Actions: Cancel Back Save To List Save & Submit

- **Name** – Enter a name for your report. **REMEMBER:** any report name that begins with a special character (e.g., an asterisk) will display at the top of the Reports list. Report names that begin with a number (e.g., calendar year) will display next followed by report names that begin with letters. Letters will sort in alphabetical order.
- **Description** – The description should explain the content and purpose of the report. Include any additional information that might be useful to report users especially if you intend to make this a shared report.
- **Output Format** – The default is MS Excel®. Use the pull-down selection list for other possible options.
- **Availability** – Use the radio buttons to indicate if the report is restricted to personal use (My Reports) or can be shared with other system users based on their user role (Organization Reports). If you select Organization Reports, then your screen refreshes to display a selection box setup. Use the buttons between the boxes to make your selection(s) from the Available Organization(s) list.

Availability: ☐ My Reports ☒ Organization Reports

Shared With: Available Organization(s)

Selected Organization(s)

Source: Author: admin 3/1/18

>> > < <<



- **Transfer report** – If you select one of the FTP buttons, then additional fields display for you to complete related to the File Transfer Protocol details:

Transfer report: ☐ No ☒ FTP ☐ SFTP ☐ FTPS

Remote host: _____

Remote directory: _____



Remote username: _____

Remote password: _____

Remote filename: _____

7. Click the **save to list** button () in the Actions section to save your report setup. You can retrieve the report from your Reports list and run it at any time in the future.
8. Or, click the **save & submit** button () in the Actions section to save and run your report at the same time. The Submit Custom Report screen displays.


Submit Custom Report - Sample Report

Actions:  

Parameters: No parameters defined

Filters



Data Element	Operator	Value
Buyer Organization Name		eSC (euroShell Cards B.V.)

Output Format: Excel Compatible 

Email report output: ☒ No ☐ Link in Email ☐ Email Attachment

Schedule Specifics

☒ Run Immediately ☐ Schedule

Actions:  

9. Review the Parameters and Filters settings. This is a summary of the selections you made on Tab 3.
10. Use the radio buttons in the **Email report output** field to select whether you want to save the report results only within IQN or email the report as a link or an attachment. (Use the “No” option to save the report within IQN.)

Email options: Click either the **Link in Email** or the **Email Attachment** radio button to email your report to a select list of email recipient(s). If you do not see a recipient's name listed, then click the **search** button and follow the prompts in the pop-up window or enter their email address in the **Email Address** field, then click the **Add** button to add them to your list.



The screenshot shows the IQNavigator web interface. A search criteria dialog box is open, displaying 'Search Criteria: contains', 'Last Name *', and 'Case Sensitive' options. Below the dialog, the main form includes 'Email report output' options (No, Link in Email, Email Attachment), a 'Please utilize the 'Search' to Add -->' instruction, an 'Email Address' field, and 'Schedule Specifics' with 'Run Immediately' and 'Schedule' radio buttons. At the bottom, there are 'Cancel' and 'Submit' buttons.

Schedule options: Click the **Schedule** radio button if you want to specify the delivery time for your report. Manually enter your settings or use the calendar picker or selection lists. You can schedule your report to run daily, weekly, or monthly.

The 'Schedule Specifics' section shows the 'Run Immediately' radio button selected, with the 'Schedule' radio button also visible. Below, there are fields for 'Scheduled Start Date' (2/8/19), 'Scheduled End Date', 'Scheduled Start Time' (12 : 04 PM), and 'Run Next Report Every' (1 Days). Each date and time field has a calendar icon to its right.

- Use the **Run Immediately** radio button to run your report without delay.
- Use the **Schedule** radio button to run your report at a later time. Required fields are indicated by a red asterisk (*). Settings include:
 - **Scheduled Start Date*** – Enter the date to use for the first run of the report.
 - **Scheduled End Date*** – If you set a report duration, then enter the date for the final run of the report.
 - **Scheduled Start Time*** – Enter the time the report should run.
 - **Run Next Report Every** – This can be set to DAYS, WEEKS or MONTHS. Use the checkbox if you want to run this report on the last day of the month.

⚠ BE AWARE: Data fields used in reports are frequently based on daily activity within IQNavigator. Daily activity updates are made at midnight (12:00 a.m.) **BASED ON US**

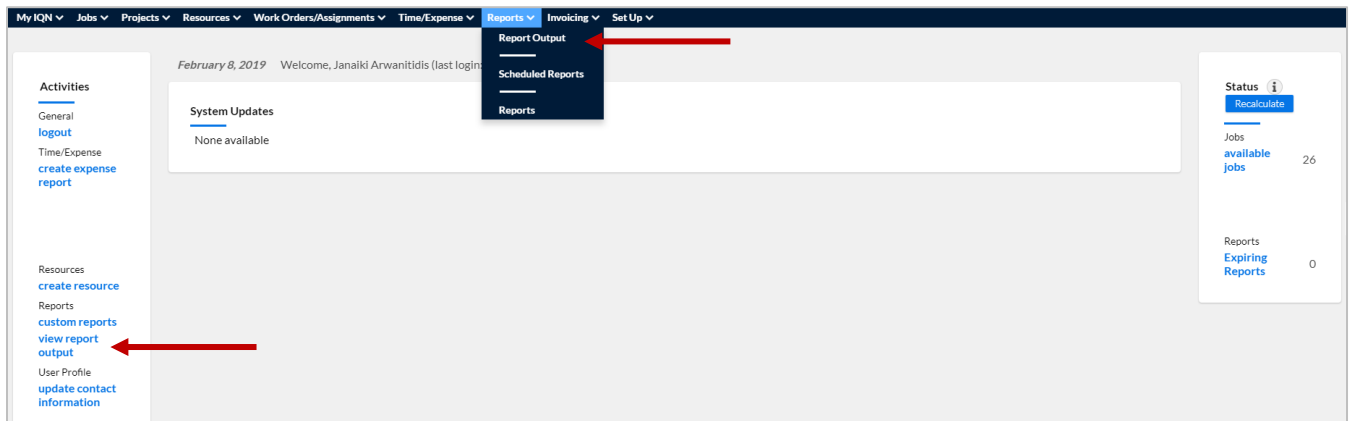


MOUNTAIN STANDARD TIME (MST) since IQNavigator is based in Denver, Colorado. The time differential between your location and the Denver location needs to be factored into your scheduled report settings to ensure optimal results. **Therefore, it is best to schedule reports for well after 12:00 a.m. MST.**

11. Click the **submit** button in the Actions section to run the report. If the Schedule setting is “Run immediately”, the report will run without delay. If it is a scheduled report, it will run based on the schedule you created.

To view your report output:

1. Log in to IQNavigator using your *user name* and *password*. Your Home dashboard displays.
2. Hover over the **Reports** tab in the Header Menu bar and click **Report Output**. The Report Output list screen displays with a list of all pending or completed reports based on your user role.
Optional: Use the “view report output” hyperlink located in the Reports section of the Activities column on the left-hand side of your dashboard for direct access to these reports.



3. Locate the report output you want to review and check the Status column. If the report status is “scheduled”, click the refresh button (**refresh**) in the Report Output header bar, OR, use the “Auto refresh enabled” checkbox located above the header bar to update the report output results. Once the report output process is complete, your Report ID changes to a hyperlink.

Displaying 1 - 3 of 3 items

Report Output

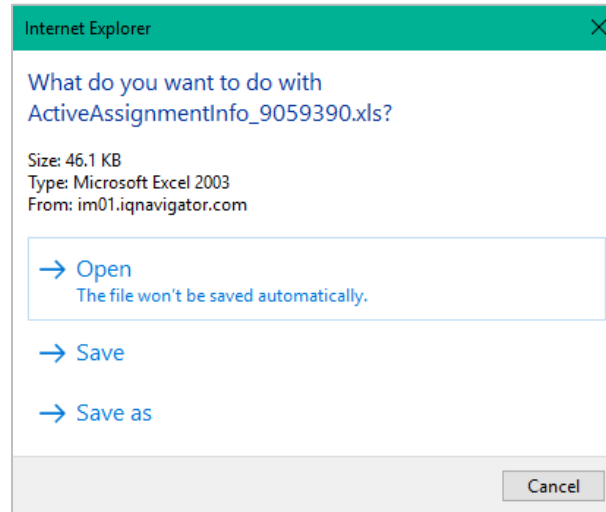
Refresh

Results per Page: 50

Report ID	Name	Data Source	Submit Date/Time	Completion Date/Time	Report Type	Status	Actions
10223811	sample report	Assignment Summary (supplier organization)	2/8/19 12:10 PM		Excel Compatible	submitted	delete
Report ID	Name	Data Source	Submit Date/Time	Completion Date/Time	Report Type	Status	Actions
10223811	sample report	Assignment Summary (supplier organization)	2/8/19 12:10 PM	2/8/19 12:11 PM	Excel Compatible	completed	delete



- Click the hyperlink Report ID to access the report output. Follow your internet browser prompts to open the report or save the file to the location of your choice.



- Use the pull-down selection list in the Actions column to delete, resubmit, show details, or show SQL for a specific report. Click the GO arrow (➔), then follow the prompts to complete your selected action. **NOTE:** When you delete a record in the Report Output list, you only delete the report “run” results. The report itself (e.g., format, schedule, and distribution list) will still be available from the Reports list screen.

⚠ BE AWARE: IQNavigator automatically purges reports after 35 days. If you want to retain a copy for later viewing, you will need to save the report output to your computer or one of your system network folders.