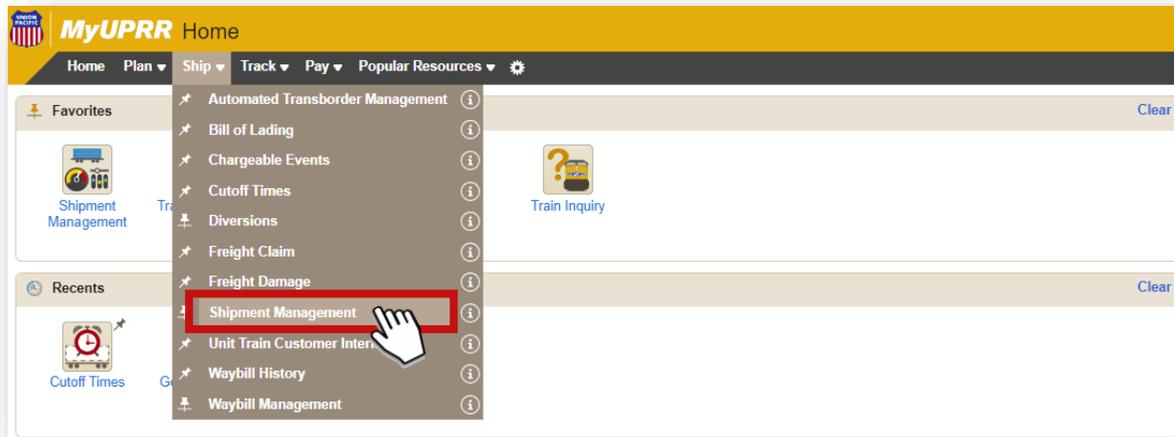# CREATING A CUSTOM REPORT FROM SCRATCH
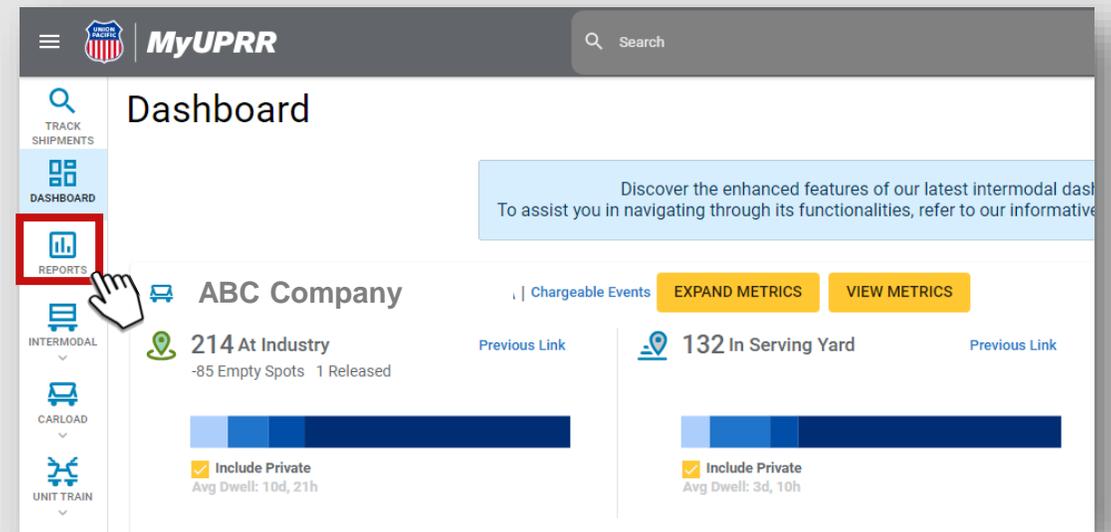
—

Access Reports with Ease

To access Reports, select **Shipment Management** on the Ship dropdown menu.

After accessing Shipment Management, navigate to **Reports** on the menu and click on it.

Creating a Custom Report

To streamline the process of creating a report, we have developed report templates that simplify the task at hand. If you can not find a template that meets your specific needs, you have the option to create a custom report from scratch.
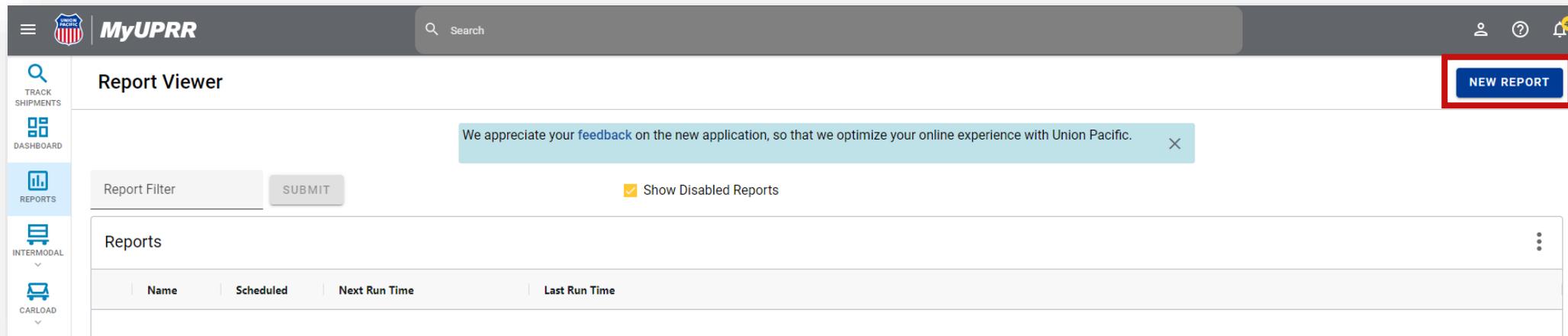
Getting started is as easy as clicking on the **New Report** button located in the right-hand corner.

Creating a Custom Report

- Report Builder offers the flexibility to create a custom report.

- Access the **Build Your Own Report** option located after the report templates.

Creating a Custom Report

- Experience a guided process where you will be prompted with questions to determine the data and presentation of your report.

- Select the **Edit** button next to the first question to begin creating your report.

Please note that not all steps are mandatory, but narrowing down your data can significantly enhance your data consumption process.

Report Title

Enter a name for your new report.

➡️ Click **NEXT** to move on to the next item.

Column Selection

Unlock a wealth of options with over 200 available columns!

Columns will be:
No columns selected

EDIT

Categories
All

Search available fields

Available Columns

| AAR Car Kind |
| AAR Pool Number |
| Account of (Destination) City |
| Account of (Destination) City-State |
| Account of (Destination) Firm Number |
| Account of (Destination) Party Name |
| Account of (Destination) State |
| Account of (Origin) City |
| Account of (Origin) City-State |
| Account of (Origin) Firm Number |

Selected Columns

>

<

Select the desired column name under **Available Columns** and move it to the **Selected Columns** section by clicking this arrow.

Remove unwanted columns by selecting the name you no longer want under **Selected Columns** and click the arrow to move it back to the **Available Columns** list.

- Narrow down the available columns by utilizing the **Categories** list for filtering.
- Quickly find specific columns by typing in the **Search** box.

PREVIOUS   NEXT

Click **NEXT** to move on to the next item.

Report Filters

Filtering data allows you to focus on specific subsets of information that are relevant to your analysis.

- Select a category to help quickly narrow down your options.

- Click into the filter field to view the options for the chosen category.

- Enter your desired filter criteria in the free form fields. Utilize the "includes", "excludes", etc. to refine the report results.

In the example: We want to see shipments consigned to ABC Company in Omaha, NE.

Click **NEXT** to move on to the next item.

Report Grouping

When creating a report, grouping data allows you to organize and summarize information based on common characteristics or attributes.
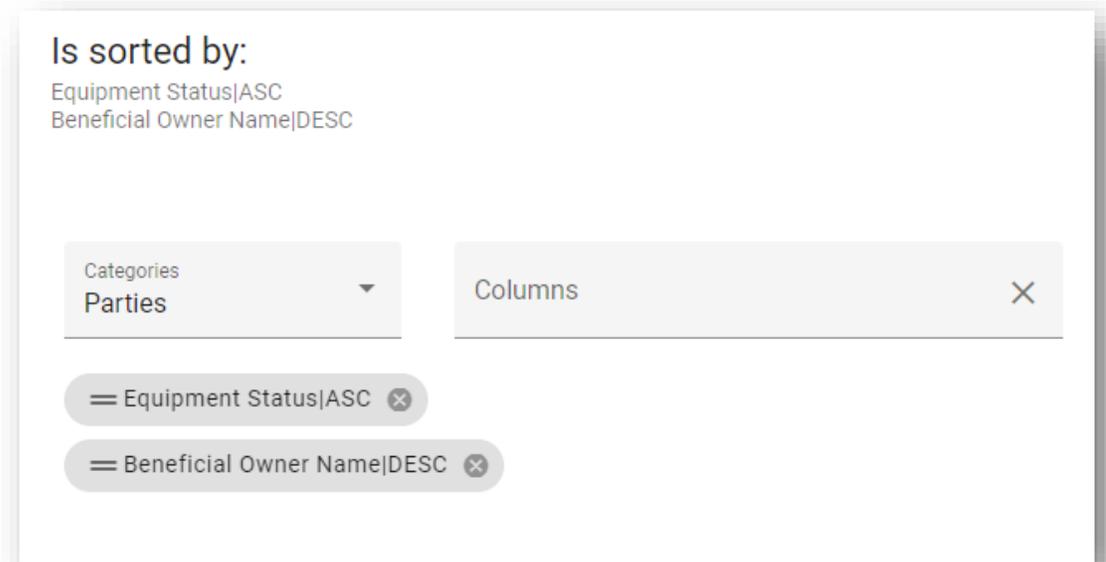

- Select a category to help quickly narrow down your options.

- Click into the columns field to view the options for the chosen category.

- Arrange the grouping hierarchy by clicking on your selection and drag to change the order.

- Click **NEXT** to move onto the next item.

Report Sorting

Sorting data allows you to arrange the information in a specific order based on one or more criteria.

- Select a category to help quickly narrow down your options.

- Click into the columns field to view the options for the chosen category.

- Choose the sort order, either ascending (ASC) or descending (DESC).

- Arrange the grouping hierarchy by clicking on your selection and drag to change the order.

- Click **NEXT** to move onto the next item.

Scheduling Your Report

Here are some useful tips to consider when scheduling your report:

- When selecting the days of the week, you have three options to choose from:
    – Weekdays
    – Everyday
    – Custom

- Selecting weekdays or everyday will automatically check the corresponding days.

- If you opt for the custom option, you will need to manually select the specific days of the week.

Scheduling Your Report

- Select the desired time for receiving your report. The following are two common scenarios:

  1. To receive the report once a day:
     - Start Time = the time you want to receive the report (e.g., 8:00 AM)
     - Send Every = 24 hours
     - End Time = the time you want to receive the report (e.g., 8:00 AM)

  2. To receive the report multiple times a day:
     - Start Time = the time you want to start receiving reports (e.g., 8:00 AM)
     - Send Every = the hours between reports (e.g., 4 hours)
     - End Time = the time you want to stop receiving reports (e.g., 5:00 PM)

Scheduling Your Report

- Choose the desired format for receiving the report:

- CSV

- HTML

- EXCEL

- Your user ID and email address will automatically populate in the corresponding fields.

- Once you have made your selection, click on the **SUBMIT** button to proceed.

Reviewing Your Report Selections

If you wish to make any changes, select the **EDIT** option in the corresponding section.


Click the **BACK** button to navigate to the previous page.

Click on the **PREVIEW** button to display a preview of the report before running or generating it. This allows you to preview the layout, formatting, and data to ensure it meets your expectations.

Click the **SAVE** button to save your report, preserving all the selected settings and configurations.

Click on the **SAVE AND CLOSE** button to save your report and close the editing interface. You will be directed back to the main Reports page.

Report Creation Success!
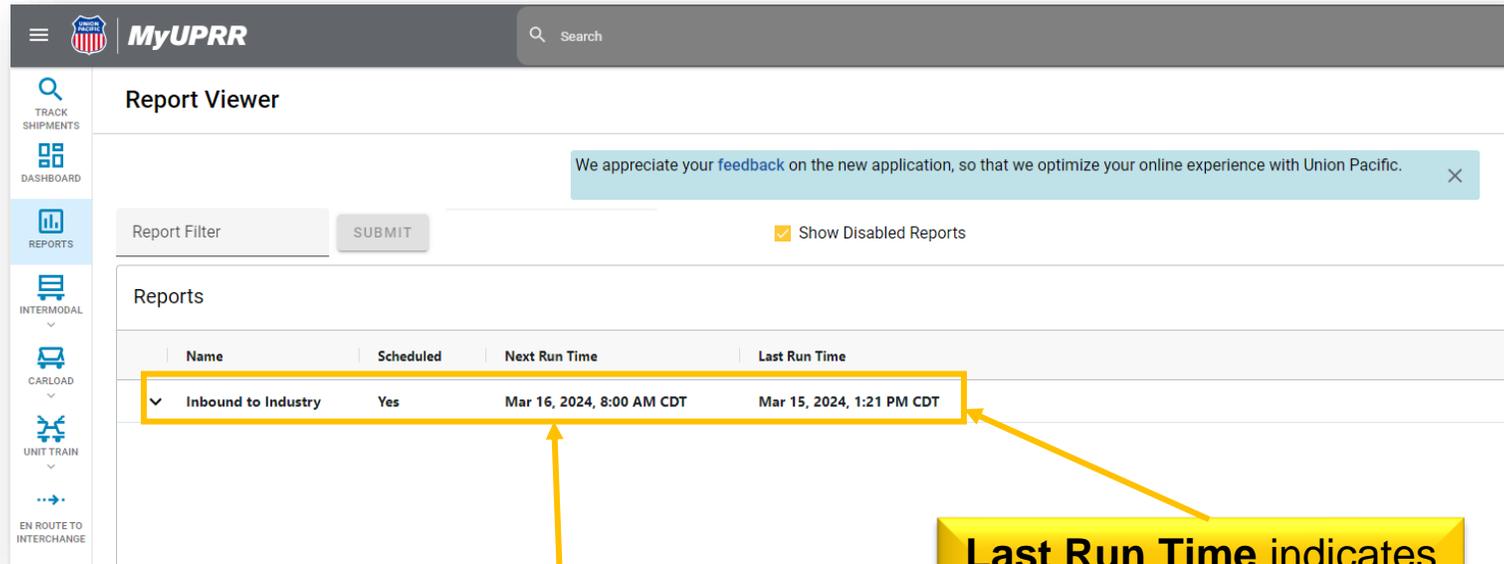
Congratulations on successfully creating your report!

You can now find your report conveniently listed on the Report Viewer page.

This page serves as a central hub where you can easily access and manage your reports.

Understanding the Report Viewer

Find reports easily by entering characters from the report name and submit.

Uncheck box to remove the disabled reports from your view.

By clicking the dropdown arrow next to the report name, a list of actions will appear. Here's a breakdown of the actions you can perform:

Run: Manually execute the report, and the results will be delivered directly to your email.

Clone: Share a copy of the report with your co-workers.

Edit: Make changes to your existing report.

Preview: display a preview of the report before running or generating it.

Disable/Enable: If you no longer wish to receive automated delivery of the report, you can choose to disable it. Conversely, selecting enable will resume the automated delivery.

Delete: If you no longer require the report, you have the option to permanently delete it. Please exercise caution when using this action, as it cannot be undone.