

Into the Groove: Transform Data into Decisions with the Report Writer and Query Builder



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Michelle has been a TMA Client for 18 years, starting at the University of Arkansas Fayetteville in 2006, moving to the University of Colorado Boulder in 2013, & has been with the University of California Santa Barbara since 2017.



Agenda

1. Success in Report Writing
 - Challenges in Report Writing
2. Success in Queries
 - Challenges in Queries
3. Queries & Reports on Dashboards



Success in Report Writing

And some challenges....



Decisions to Guide the Design: Who, What, Where and When?

01

Audience (Who?):

Reports are static at the time of rendering and can be emailed, saved in various formats, as well as printed. They are best for sharing with those who don't necessarily have access WebTMA.

02

Actionable Data (What?):

Reports are for displaying data – but what are you going to do with that data? Knowing how the data will be used will guide your Report Design.

03

Access (Where and When?):

Reports are static at the time of rendering and can be printed, saved in various formats, and even scheduled to be emailed. They are the best option for sharing data with those who don't necessarily have access WebTMA.



Determining Design Options

01

Report Manager:

There is a vast number of pre-built Reports in the system that may be just what you are looking for. Before reinventing the wheel, explore the offerings in the Report Manager.

02

Report Writer – Copy System Report:

Did you find something that is *close* to what you want, but not quite there? You can copy a System Report and then tweak it to be just what you need.

03

Report Writer – Start from Scratch:

Well, not completely from Scratch! Reports are based on Forms in WebTMA, so you'll be limited to what is available on the form you choose.



Report Manager

- Categories
- Stock Reports
- System/Special/My Report

WebTMA 7

REPORT MANAGER

Fast Find - Search

★

Action Menu

General Information

All
 Adhoc
 Events
 Fleet Management
 Management
 Material
 My Report
 PM
 Projects
 Regulatory
 Room Inspection
 Safety & Risk
 Setup
 Status
 Survey

New Browse Selection

Report Name	Report Description	Parent Category	Category	System	Special	My Report
101 Min Max Part List	Min Max List	Material	Inventory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
101 Part List	Listing of part records including type, bin label, quantity on hand, issue cost, and extended cost grouped by warehouse. Option by specific warehouse or all warehouses.	Material	Inventory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ABC Analysis Report	A list of inventory items sorted by usage value. Usage value = quantity used * cost. For example, 'A' items have at least 80% of the cumulative usage-value, 'B' items are the next 15%, and 'C' items are the remaining 5%. In this case, 'A' items need to be monitored closely with high priority. Optional filtering by warehouse code.	Setup	Materials	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Account Activity Detail	A detailed listing of all account related activity. Specifically, this report shows all charges and all credits post to the Sub-Ledger, if used, or General Ledger within a specified range to each account and subtotaled by account.	Management	Accounting	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account Activity Summary	A summary listing of all account related activity. Specifically, this report shows all charges and all credits post to the Sub-Ledger, if used, or General Ledger within a specified range to each account and subtotaled by account.	Management	Accounting	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Account Detail	A detailed listing which includes the type, starting balance, any sub-account numbers, and associated repair centers. Note: This report is intended for individual records. When printed from Report Manager, this report will include all records, and may cause a time-out error. It is included in Report Manager to allow copy and modification of the report.	Setup	Other	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Action Menu

☆ Favorites
 📄 Records
 🖨 Reports



Report Writer – Copy a Report

FileTransactionsMaterialAccountingOrganizationAdminReportsHelp

WebTMA7

REPORT WRITER

Fast Find - Search

+ AddEditCopyDeleteFirstPrevNextLastPrint

IdentityOptionsLayout

Action Menu

- Render Report
- Copy System Report

Action Menu

- Favorites
- Records
- Reports
- Linked Documents

Report Properties

Report NameCopy of WO Report

Report FormWork Order

Access by Repair CenterFSVC

User Access

Sub Report

DescriptionCustom WO Report for account 8-402510-20300-3

Active

Report CategoryAdhoc

Window ToolbarWork Order

Filter By Current Record

Created ByMichelle Key

Report Criteria

Criteria Syntax

Close Dateis not empty

Calculated Fields

Type	Field Name	Formula
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Report Writer – Start from Scratch

- Report Name
- Report Form
- Report Category
- Access by Repair Center
- Window Toolbar
- Filter by Current Record ✓
- Sub Report ✓

The screenshot displays the WebTMA 7 Report Writer application window. The interface includes a menu bar at the top with options: File, Transactions, Material, Accounting, Organization, Admin, Reports, and Help. Below the menu bar is a toolbar with icons for adding, editing, copying, deleting, and navigating between reports. The main workspace is divided into several sections:

- Report Properties:** Contains fields for Report Name (Copy of WO Report), Report Form (Work Order), Access by Repair Center (FSVC), User Access (checkbox), Sub Report (checkbox), Description (Custom WO Report for account 8-402510-20300-3), Active (checkbox), Report Category (Adhoc), Window Toolbar (checkbox), Filter By Current Record (checkbox), and Created By (Michelle Key).
- Report Criteria:** Includes a Criteria Syntax section with a dropdown menu set to 'Close Date' and a condition 'is not empty'.
- Calculated Fields:** A table with columns for Type, Field Name, and Formula.

The left sidebar contains an Action Menu with options: Render Report, Copy System Report, Favorites, Records, Reports, and Linked Documents.



Success in Query Writing

And some challenges....



Decisions, Decisions

01

Who, What, Where, and When - Again

02

Queries are just Questions you ask of your Data

03

The Data (result) is the Answer

Hint: Sometimes the Answer is "No."



Queries are just Questions

- Queries are saved on the Form
- Settings: Default, Add/Edit/Copy

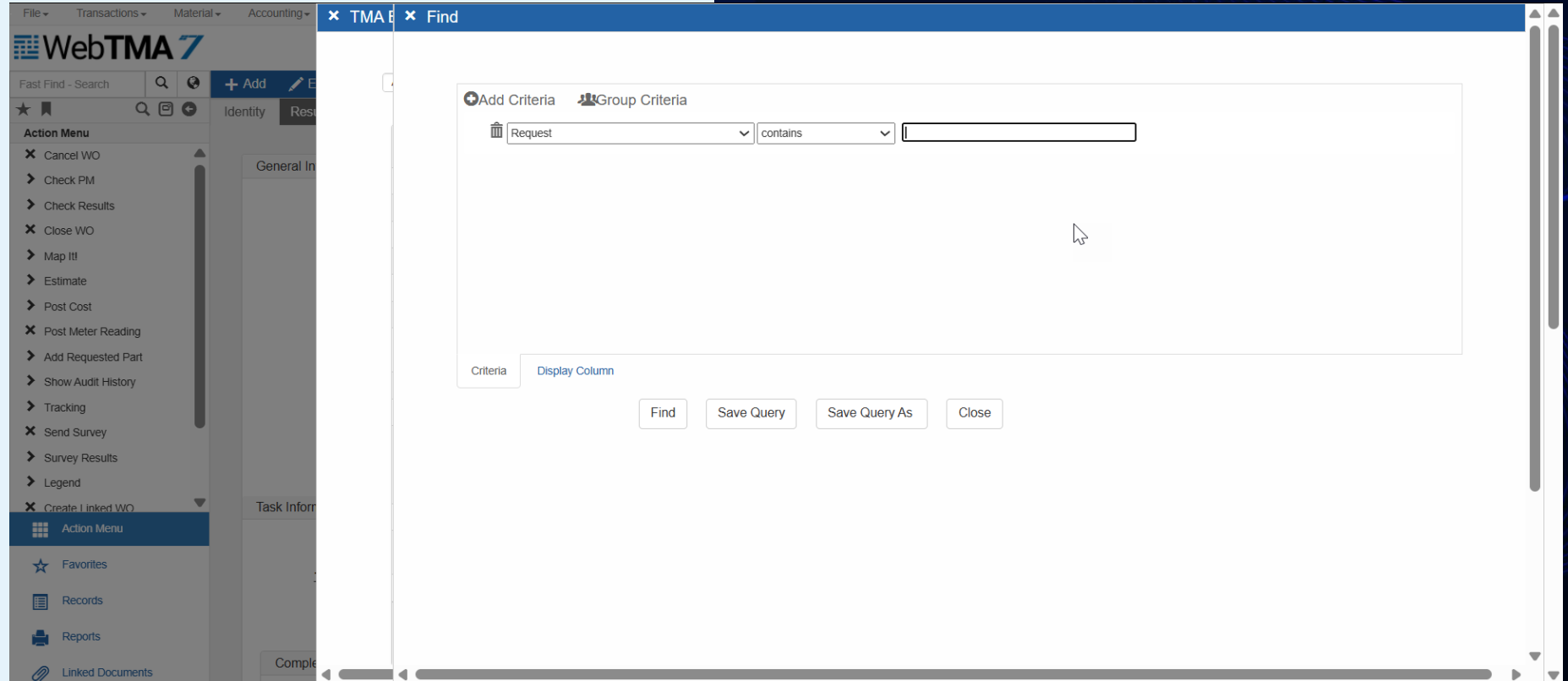
The screenshot displays the WebTMA 7 software interface. On the left is a sidebar with navigation options: File, Transactions, Material, Accounting, and Organization. Below these are sections for Records, Action Menu, Favorites, Reports, and Linked Documents. The main window is titled 'TMA Browse' and features a search bar with 'All Open Work Orders' selected. Below the search bar are buttons for 'Add', 'Edit', 'Copy', and 'Delete', along with a 'Default' checkbox and a 'Public' radio button. The 'Owner: Michelle Key' is noted. A table of work orders is displayed with columns for Work Order #, Request Date, Repair Center Code, Area Location ID, Request, Status, General Comments, and Last Modified Date. The table contains 15 rows of data, including work orders for 'Retreat work group', '981920 Pauley Track Reno DCS Time', '2019-127 Campus Pool Repair', and others.

Work Order #	Request Date	Repair Center Code	Area Location ID	Request	Status	General Comments	Last Modified Date
DCS-910000	08/29/2018 08:00	DCS		Retreat work group			10/10/2024 13:41
DCS-910002	06/09/2016 11:10	DCS		981920 Pauley Track Reno DCS Time			11/27/2023 12:53
DCS-910076	12/01/2018 11:07	DCS		2019-127 Campus Pool Repair			08/22/2023 10:17
DCS-910088	10/26/2017 11:39	DCS		Feasibility Study, Bldg. 507			
DCS-910092	12/20/2018 11:46	DCS		Child Care South Knoll Study			06/29/2023 12:41
DCS-910095	12/20/2018 11:56	DCS		Toddler to Infant Conversion			05/28/2019 09:57
DCS-910130	07/21/2018 08:00	DCS		Real Estate Code Issues per 7-19-18 EML \$2,000 Daniel Sweeney			12/15/2023 09:46
DCS-910135	01/26/2018 08:00	DCS		Code Review NCFH Phase IV & V			12/15/2023 13:35
DCS-910190	04/07/2017 10:01	DCS		East Bluff Repair Study			05/09/2023 17:07
DCS-910192	03/04/2019 11:16	DCS	560-ROOF	check fire door for Asbestos 1reqname: Gene 5abudget: 0 5b: Repair/Maintenance 5k: Other 6account #: BM704			06/29/2023 12:48
DCS-910205	07/01/2023 23:27	DCS		AUTHORIZED UNION ACTIVITY-RCHG			09/06/2023 14:16
DCS-910207	08/29/2018 23:29	DCS		Software Training Time		Kara Nowell 07/18/2023 22:58 - use DCS-911599 for FY24	07/18/2023 23:00
DCS-910212	01/29/2019 08:45	DCS		981986 Classroom Bldg STP			03/29/2023 17:11



Queries are just Questions

- Add Criteria & Group Criteria
- Display Columns

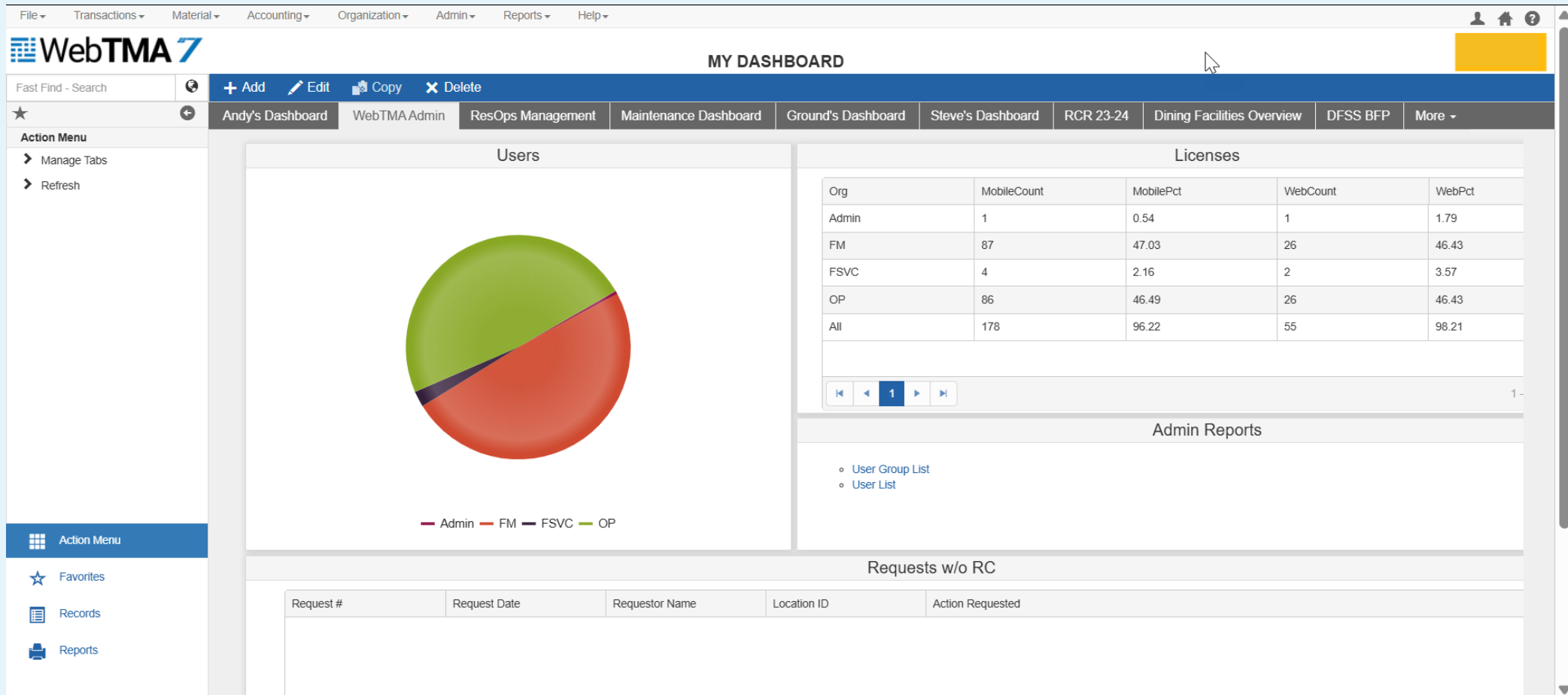


Queries & Reports on Dashboards

Putting it All Together



Putting it All Together on a Dashboard



Reports on a Dashboard

The screenshot displays the WebTMA 7 dashboard interface. The main window is titled 'Add Item' and features a 'Control Type' section with buttons for Bar Chart, Pie Chart, Digital, Dial Gauge, Grid, Bulletin, and Report List. Below this is a 'Configuration' section with fields for 'Name*' (containing 'Admin Reports') and 'Comments'. At the bottom of the 'Add Item' window is a table with columns 'Title', 'Comments', and 'Access'. To the right, a 'Report Selection' window is open, showing a table with the same columns. The table lists three reports: 'User Group List', 'User List', and 'User List FM'. The 'User List FM' report has 'public' access. The 'Report Selection' window also includes a search bar, a filter icon, and a table with columns 'Title', 'Comments', and 'Access'. The 'Add Selected' and 'Cancel' buttons are visible at the bottom of the 'Report Selection' window.

WebTMA 7

File ▾ Transactions ▾ Material ▾ Accounting ▾ Organization ▾ Admin ▾

Fast Find - Search [icon] [icon] ✓ Save ✕ Cancel

★ [icon] [icon] Andy's Dashboard WebTMA Admin

Action Menu

- Add New Control
- Import Controls

Configuration

Name* Admin Reports

Comments

Add Reports Delete Selected

	Title	Comments	Access
<input type="checkbox"/>			

Report Selection Add Selected Cancel

	Title	Comments	Access
<input type="checkbox"/>	User Group List	A listing of all user groups.	
<input type="checkbox"/>	User List	A list of all users.	
<input type="checkbox"/>	User List FM	A list of all users.	public

Add Selected Cancel

Queries on a Dashboard

WebTMA 7

File Transactions Material Accounting Organization

Fast Find - Search

✓ Save ✕ Cancel

★

Andy's Dashboard WebTM

Action Menu

- Add New Control
- Import Controls

Request #

0

Add Item Save Cancel

Control Type

- Bar Chart
- Pie Chart
- Digital
- Dial Gauge
- Grid
- Bulletin
- Report List
- Add Item

Configuration

Standard ☐ Summary ☐ Multi ☐ Map ☐ Details ☐

Name* Requests w/o RC

Comments

Query Method Window Query ☐ Custom Query ☒

Base Window Request Log

Base Query Requests Not Accepted/Rejected No RC

Show Accept Request Button ☐

Preview

Thank You / Q&A

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