ORS

Contents

1 ORS

The ORS Reporting Suite is based on a number of key database tables in order to allow the user a degree of flexibility in extracting the data they require. The data is extracted into the .csv format which can be viewed in Microsoft Excel.

1.1 Accessing the Extract Suite

To gain access to the Reporting Suite, select "Administration", "File Interfaces" and "Extract Suite" (see below).
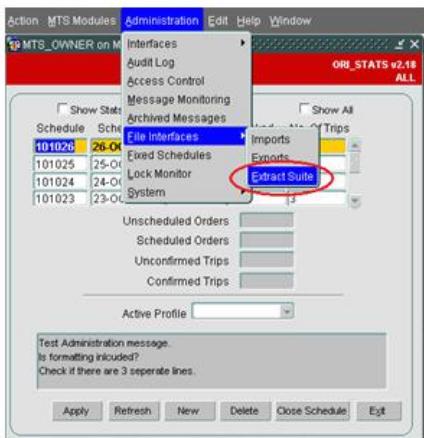
1.2 Creating a New Report

The following example details the steps required to create a new report from scratch based on "Orders".

A list of all available ORS reports is available on the Assist pages.

The "Orders" report has 3 report levels (Header, Line, Items) , each allowing a different amount of information to be displayed and manipulated by the user. The table below shows the data available at each level. If Report Level Items (3) is selected then all levels above that (Line(2) and Header (1)) will also be extracted.

Report Type	Report Level	Report Level Description	Available Columns
ORDERS	1	HEADER	sched_name
ORDERS	1	HEADER	oms_ref
ORDERS	1	HEADER	status
ORDERS	1	HEADER	customer
ORDERS	2	LINE	line_no
ORDERS	2	LINE	product_type
ORDERS	2	LINE	DU_type
ORDERS	2	LINE	Quantity
ORDERS	3	ITEMS	item_identifier
ORDERS	3	ITEMS	qty_ordererd

We will begin by selecting a Report Type of "Orders" and a Report Level of "Header" as shown below.

If we select a Report Type of "Orders" and "Report Level" of Header we see the following columns shown on the form.

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We could run this report as it stands but it is advisable to firstly restrict the report in some way otherwise the system could try to retrieve thousands of order records which will potentially take a long time.

1.3 Restricting the Report

In this example, we will restrict the report by entering a restriction of the "order number" from 988046 to 988079. This is possible because the "Sel" column is set to "R" (Range Selection). When the column is set to "Y" you can enter a value in the "From" column only. When the column is set to "N", no restrictions can be set (see the following example).
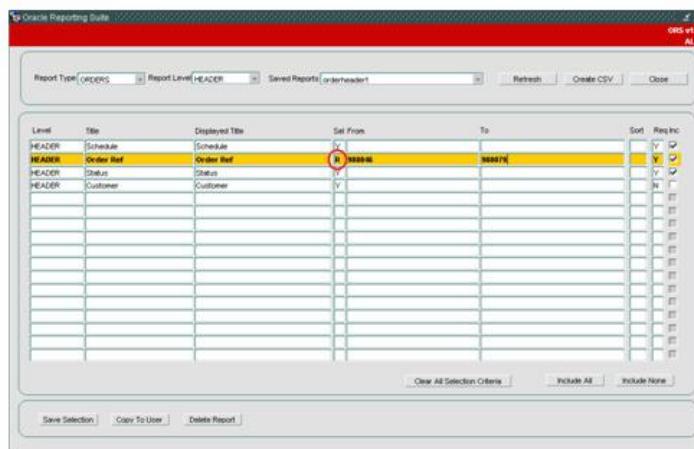

1.4 Saving the Report

When the report restriction has been decided, the user is required to click on the "Save Selection" button at the bottom left of the screen. This would display a pop-up as shown below:
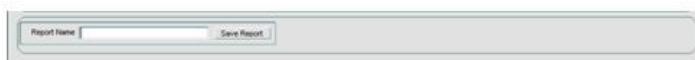
A report name needs to be entered so in this example we will enter "orderheader1" (see below).
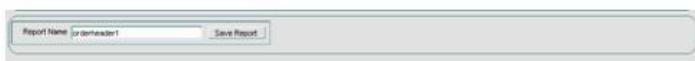
Once the "Save Report" button is clicked, this report is saved and can be retrieved at a later date and a .csv extract file produced. Having clicked the "Save Report" button, the report name is submitted to the "Saved Reports" list of values at the top of the screen:

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1.5 Creating the CSV Extract

Now we are ready to produce the extract .csv file. To do this, simply select the "Create CSV" button (having firstly done the steps in sections 2.1 and 2.2). The user will be shown the following confirmation pop-up, asking whether to open, save or cancel the extract. In this example we will select "Open".
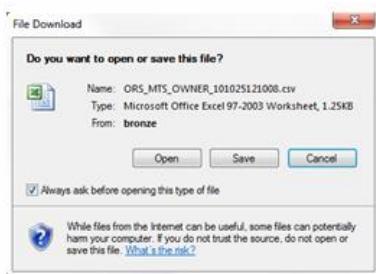
Once the "Open" option has been selected, Microsoft Excel will open and display the contents of the .csv file (see the following .csv extract example). The time taken to do this depends on the number of records to be retrieved by the Extract Suite screen.

	A	B	C	D
1	Schedule	Order Ref	Status	
2	950612	988046	INVALID	
3	950612	988047	INVALID	
4	950612	988048	INVALID	
5	950612	988049	INVALID	
6	950612	988050	INVALID	
7	950612	988051	INVALID	
8	950612	988052	INVALID	
9	950612	988053	INVALID	
10	950612	988054	INVALID	
11	950612	988055	INVALID	
12	950612	988056	INVALID	
13	950612	988057	INVALID	
14	950612	988058	INVALID	
15	950612	988059	INVALID	
16	950612	988060	INVALID	
17	950612	988061	INVALID	
18	950612	988062	INVALID	
19	950612	988063	INVALID	
20	950612	988064	INVALID	
21	950612	988065	INVALID	
22	950612	988066	INVALID	
23	950612	988067	INVALID	
24	950612	988068	INVALID	
25	950612	988069	INVALID	

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As can be seen, the 3 selected columns from the screen (Schedule, Order Ref and Status) are included in the extract file.

1.6 Amending the Report Titles

If we wished to change the Excel column titles, we need to change the "Displayed Title" on the form. In the following example, we have amended the Displayed Title from "Order Ref" to "Order Reference".

Having amended the Displayed Title, by clicking the "Create CSV" button, we can now see the amended column heading in the .csv Excel extract file.

1.7 Sorting Report Columns

There is also the option to sort the output by entering a sort order into the "Sort" column on the form (see below). Further sorts can be done by entering 2, 3 etc.

As can now be seen, the Status column is now sorted alphabetically in the .csv Excel extract file.

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28	950612 988069	INVALID	
29	950612 988070	INVALID	
30	950612 988071	INVALID	
31	950612 988072	INVALID	
32	950612 988073	INVALID	
33	950612 988074	INVALID	
34	950612 988075	INVALID	
35	950612 988076	INVALID	
36	51128 98807	SCHEDULED	
37	51128 98806	SCHEDULED	
38	51128 98805	SCHEDULED	

1.8 Using the Include All and Include None Buttons

By selecting the ""Include All" button, all of the available columns will automatically be selected which saves the user having to individually select each column they wish to include the report (this may be useful if there are many columns available to select). In the following example the "Include All" button has been pressed. This has automatically selected the only additional column which wasn?t already selected for inclusion in the .csv extract.
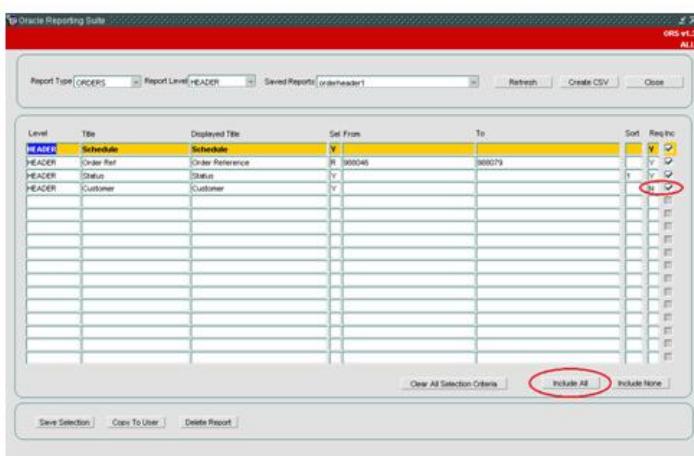
It is worth noting that any columns with the "Req" (required) field set to "Y" already have the "Inc" (included) check box selected. The "req" column is not normally updatable via this screen, it?s value is set in the corresponding database table.

You may change the "Req" value if your user group is configured to allow this - this affects whether the parameter is required when running the report, from here and any other system that allows running of saved ORS reports, such as Calidus Portal or CTL. 🔴 **Warning**: Changing the value in this field can result in massively inefficient reports, so much care should be taken. Confirm this with your system administrator first, and they can set the function for your group (ORS_Edit_Req_Field).

Having selected the "Include All" button, we can again run the report via the "Create CSV" button and, in the following example, see the addition of an extra column to the extract .csv file.

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If the "Include None" button is selected then all of the fields which don?t have the "Req" field set to "Y" will be unchecked and removed from the report extract.

1.9 Using the Copy To User Function

The "Copy to User" button allows the current report to be copied to another user. When the button is pressed a pop-up is shown which allows a user to be selected where the report is to be copied to. The new report name also needs to be entered here.
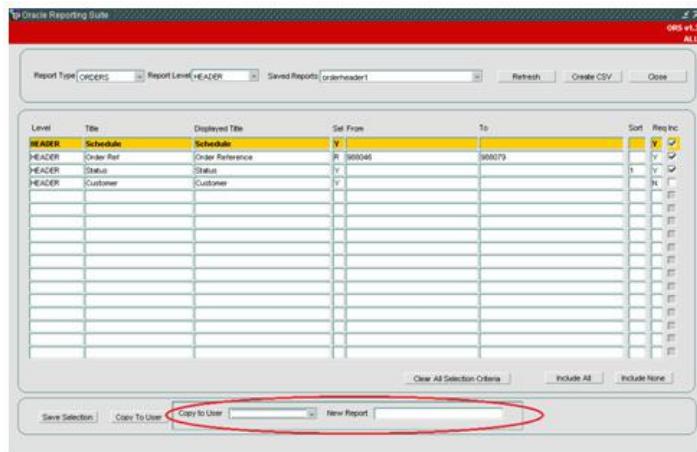
Selecting the user is done via a list displaying the users where the report can be copied to.
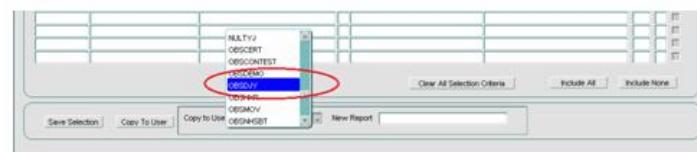
The new report name should be entered in the field provided. This will then be accessible to the user selected. The information is saved upon pressing return after filling out the new report name.
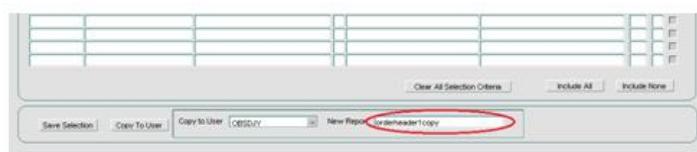
If we were now to log onto the system as the user who has had the report copied to (e.g. OBSDJY) we can select the report from the "Saved Reports" list and all the selected column details (restrictions on the order reference column and the sort on the status column) are accessible by the new user (see the following example).

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1.10 Clear All Selection Function

The "Clear All Selection Criteria" button simply allows the user to clear all of the "From" and "To" selection criteria (if any exists).

1.11 Creating an Order Line Report

As previously stated, the "Orders" report has 3 different levels of report (Header, Line and Items). If we now click the "Refresh" button at the top of the screen (to clear all the existing report details and reset the form) and then select a new report type of "Orders" and a Report Level of "Line", we can see the following details on the form. The order line details have now been added to the existing order header details.

Again, we will enter some restrictions on the report (in the order reference field) to restrict the report. See below:

We will save the report as "orderlines1" by clicking on "Save Selection" and then "Save Report".

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If we were now to run the extract via the "Create CSV" button we would get an extract file similar to the following example. Note that the "Included" order line columns (Line No and DU Type) have been included in the extract file. We didn?t include the remaining order line columns (Prod Type and Quantity) so these have not been included.

	A	B	C	D	E
1	Schedule	Order Ref	Status	Line No	DU Type
2	950612	988046	INVALID	1	Packs
3	950612	988047	INVALID	1	Packs
4	950612	988048	INVALID	1	Packs
5	950612	988049	INVALID	1	Packs
6	950612	988050	INVALID	1	Packs
7	950612	988051	INVALID	1	Packs
8	950612	988052	INVALID	1	Packs
9	950612	988053	INVALID	1	Packs
10	950612	988054	INVALID	1	Packs
11	950612	988055	INVALID	1	Packs
12	950612	988056	INVALID	1	Packs
13	950612	988057	INVALID	1	Packs
14	950612	988058	INVALID	1	Packs
15	950612	988059	INVALID	1	Packs

ORS_MTS_OWNER_101026091059[1]

1.12 Creating an Order Item Report

Next we will look at the Order Items report. If we now click the "Refresh" button and entered new report details of Report Type = "Orders" and Report Level = "Items", we would get a report looking similar to the following example.

Once we have entered the restriction criteria for the new report (e.g. Order Reference 988046 to 988079), we should click "Save Selection" and enter the Report Name of "orderitems1". Finally, click "Save Report" so it can be retrieved later.

Report Name orderitems1   Save Report

Now run the report via the "Create CSV" button and we should the addition of the order items to the orders extract file (if any exists).

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1.13 Deleting a Report

By firstly selecting a report (e.g. orderheader1) we can delete the report via the "Delete Report" button.

Once the "Delete Report" button has been pressed, a confirmation message appears to check if the report can actually be deleted.
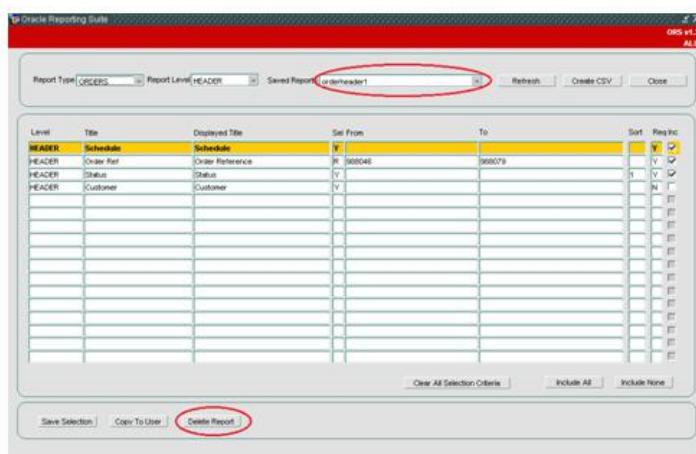
If the "OK" button is selected then the report will be deleted for the current user. If the report has been copied to another user before deletion then this report will still exist for that user after deletion. After the report has been deleted, we can see by trying to select the report via the "Saved Reports" button that the report no longer exists for this user.

As can be seen above, the report "orderheader1" is no longer shown in the "Saved Reports" list. If after deletion, there was a requirement to retrieve this report we could log on as the user we copied the original report to in section 2.7.

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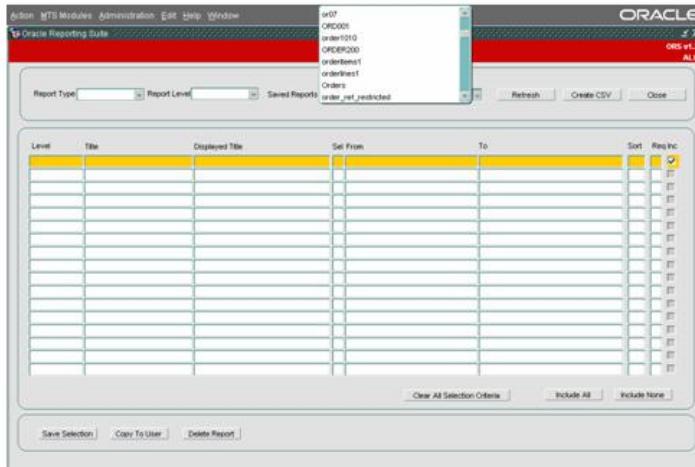
As can be seen above, the report "orderheader1" is no longer shown in the "Saved Reports" list. If after deletion, there was a requirement to retrieve this report we could log on as the user we copied the original report to in section 2.7.

1.14 Count, Sum and Group By

ORS reports allow aggregate functions Count, Sum and Group By.

Note: A system Parameter ORS_SUMMARY controls the display of the Oracle Report suite screen.

When this parameter is set to Y, users are able to group, sum and count information within the report extracts. When this parameter is set to N, the grouping and summary fields will not be available on the screen.
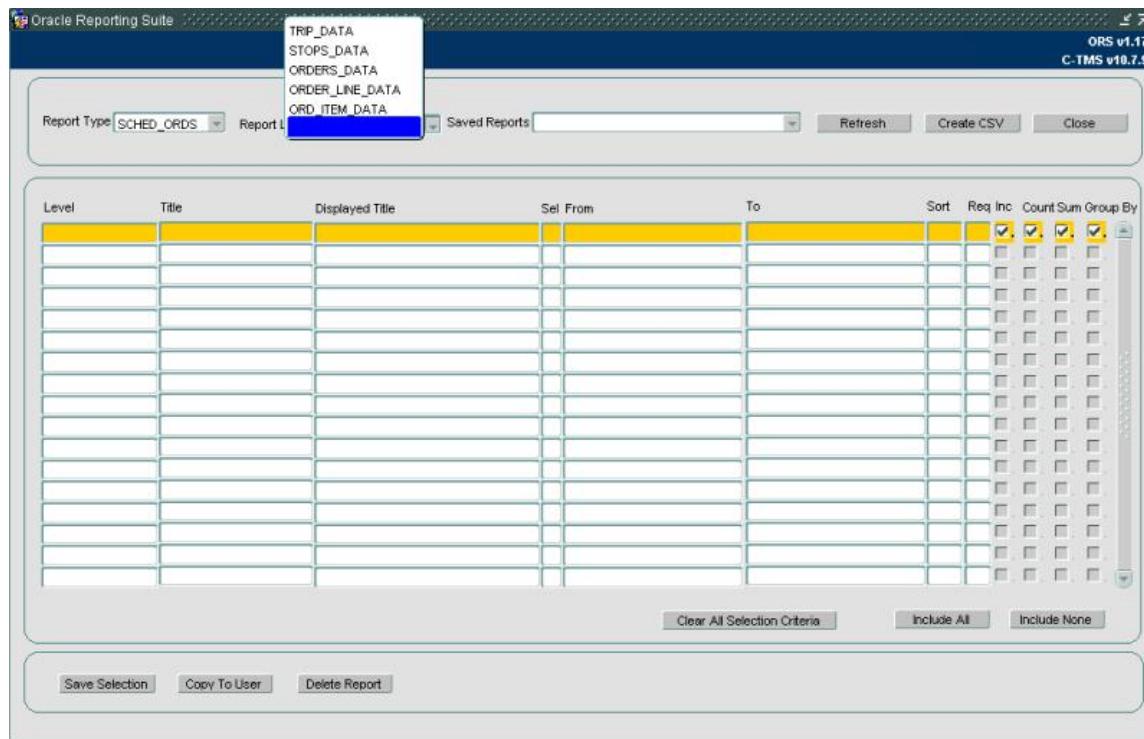
You may only count or sum columns from the lowest level selected. For all other levels, the count and sum will be disabled.

If you choose to select a sum or count, all other columns selected which are not a summary must be selected as a group by. In addition to the group by, the sort order is also required.

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In the above example, a new report has been created based on the highest report level within SCHED_ORDS, TRIP_DATA. We are able to select from all the columns available within the TRIP_DATA section.

We have chosen to generate a report which counts the number of trips at each status for each owning depot. To generate this correctly, we have identified the trip id as a count field and defined the sort level for Status and owning depot, with the "group by" ticked.

This will produce an extract similar to the following:

```
COUNT(ST.TRIP_ID), Trip Status, Owning Depot
1, ACCEPTED, DEPOT1
3, ACCEPTED, DEPOT2
8, COMPLETED, DEPOT2
1, DELETED, DEPOT1
3, DELETED, DEPOT2
2, DELETED, DEPOT3
1, EN-ROUTE, DEPOT1
1, EN-ROUTE, DEPOT2
1, PLANNED, DEPOT1
1, PLANNED, DEPOT2
```

1.15 Scheduling ORS Reports

Details of this can be found here: EDI - Report/Extract Scheduling.

1.16 Further Configuration

The following System Parameters affect this functionality:

Parameter	Description	Level
ORS_DELIMITER	Oracle reporting suite data field delimiter	SYSTEM
ORS_SUMMARY	Allow the summarisation OF ORS reports	SYSTEM
ORS_TYPE_DEF_GROUP_BY	List of the ORS types to default group by fields	SYSTEM
ORS_TYPE_EXC_GROUP	Exclude ORS types from grouping fields	SYSTEM

The following Access Control Group Accessible Functions affect this functionality.

Function	Description
ORS_Edit_Req_Field	Ability to edit required fields in ORS report

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