Generating, Viewing and Downloading Reports

Reporting & Analytics · https://learn.logisense.com/docs/1373995009/

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Reports are available from the Reports menu

Overview

This screen is used to browse the report library and open live reports. The screen presents reports in a folder tree on the left. When a report is selected, the application navigates into the live report view where the report parameters, filters, schedule history, and generated output controls are shown.

The screen is primarily a navigation and launch point for reports rather than a data-entry form. Users use this area to locate a report in the folder structure and then open that report for generation or review.

Reports Panel

The Reports panel on the left displays the available report folders and reports in a tree structure.

Tree Behavior

- Folder nodes organize reports into report folders.
- Report nodes represent individual runnable reports.
- Expanding folders reveals nested folders and reports.
- Selecting a report opens that report in the live report view.

Available Actions And Behaviors

This screen does not expose a traditional right-side edit form. Instead, it acts as the entry point into the live report experience.

When a report is selected, the application opens the report in the live report screen. From there, users can review parameters, filters, schedule output, and refresh the report.

The screen also supports navigation back to a report from an event-driven request by expanding the tree and selecting the matching report automatically when needed.

Live Report View

After a report is opened, the live report view displays the report details.

Metadata Fields

- **Generated Date**: Shows when the report output was last generated.
- **Generated By User**: Shows which user generated the current report output.

Schedule Tab

The **Schedule** tab is the default live report tab.

This tab can show:

- the report parameters required for generation
- schedule-related output details
- a refresh action used to generate or regenerate the report
- an informational message when no report output is currently available

Filter Tab

The **Filter** tab is shown when the selected report has live filters available.

This tab can show:

- report filter values

- editable filter inputs
- a refresh action used to regenerate the report with the selected filters

Generate / Refresh Behavior

The live report area includes a refresh action that runs the report again using the selected parameters and filters. The generate dialog also supports report content-type selection and, when applicable, relative-date handling and report-parameter entry.

Guides

Opening A Report

1. Open the **Reports** screen.
2. In the report tree, expand folders until you find the report you want to use.
3. Select the report.
4. Review the live report view that opens for the selected report.

Running Or Refreshing A Report

1. Open the report from the report tree.
2. Review the available report parameters or filters.
3. Update any report values that are required.
4. Use the refresh action to generate or regenerate the report.

Reviewing Report Filters

1. Open the report.
2. Select the **Filter** tab when it is available.
3. Review or update the filter values.
4. Refresh the report to apply the updated filters.