

RIMS University: Ad Hoc Reporting

August 29, 2017

Presented by: Greg Crews, VP Product Management

Subject: Ad Hoc Reporting

- Overview

Ad Hoc Reporting is a self-service reporting tool available to RIMS customers to extend reporting capabilities beyond pre-defined reports. The RIMS Ad Hoc reporting solution is an outsourced 3rd party reporting server embedded into your RIMS environment.

- Topics for this Session

- What is ad hoc reporting?
 - Secure, permission based, powerful
- Who should use ad hoc reporting?
- What can ad hoc reports accomplish?
 - Simple or complex reports
 - Specific to your needs
 - Scheduled delivery via email (subscription action)

Subject: Ad Hoc Reporting

- Topics for this Session (continued)
 - What are the limitations of ad hoc reporting?
 - Data complexity
 - Data structure
 - Sub-select reporting not supported
 - Ad Hoc folder structure & related permissions
 - Personal
 - Shared
 - Global
 - Samples (Global folder)
 - Reports vs. Dashboards
 - Modifying a sample (Global) report
 - Report Building Basics
 - Ad Hoc Help (Logi)
 - Select Template
 - Select Data Source(s) – hierarchical
 - Select Filter(s)
 - Select Columns

RIMS Ad Hoc Reporting

- **What is ad hoc reporting?**

Ad Hoc reporting in RIMS is a self-service reporting module that allows customers to create custom reports, create one-time extracts or design dashboard views to monitor activities

- Secure – Ad Hoc is available to authenticated RIMS users only
- Permission Based – by user type or specific user
- Flexible architecture and quick responses for most reporting needs

- **Who should use Ad Hoc reporting?**

Ad Hoc reporting is applicable to any customer, but will be most beneficial to customers who:

- have a good understanding of RIMS data fields and where to find them
- are willing to invest time to learn the Ad Hoc reporting toolset
- are analytical or have experience with other report builders

RIMS Ad Hoc Reporting

- **What can ad hoc reports accomplish?**

Simple reports like:

- Open orders and reviews

Complex reports like:

- Tracking past due tasks/services
- Performance monitoring of vendors or staff

Specific to your needs

- Ad Hoc allows you to set parameters, define calculations and present data in the way that satisfies your needs

Scheduled delivery via email

- Ad Hoc reports can be scheduled
 - Indicate frequency and time
 - Method of data delivery (attachment vs. inline)
 - Allows any user with access to the report to subscribe to receive it

RIMS Ad Hoc Reporting

- **What are the limitations of ad hoc reporting?**

Data complexity:

- Users need to know and understand RIMS and the RIMS data

Data structure:

- RIMS data is highly structured for efficiency – over 4,000 data fields in 100s of tables
- Some data structures allow multiple sub-records which makes data retrieval into a flat report difficult or impossible

Sub-select reporting not supported

- Certain types of database queries can use conditional logic and the user of temporary tables to assemble data into an output data set; Logi does not support sub-selects in the report environment.

Animated graphic elements will not be included in Export to PDF

RIMS Ad Hoc Reporting

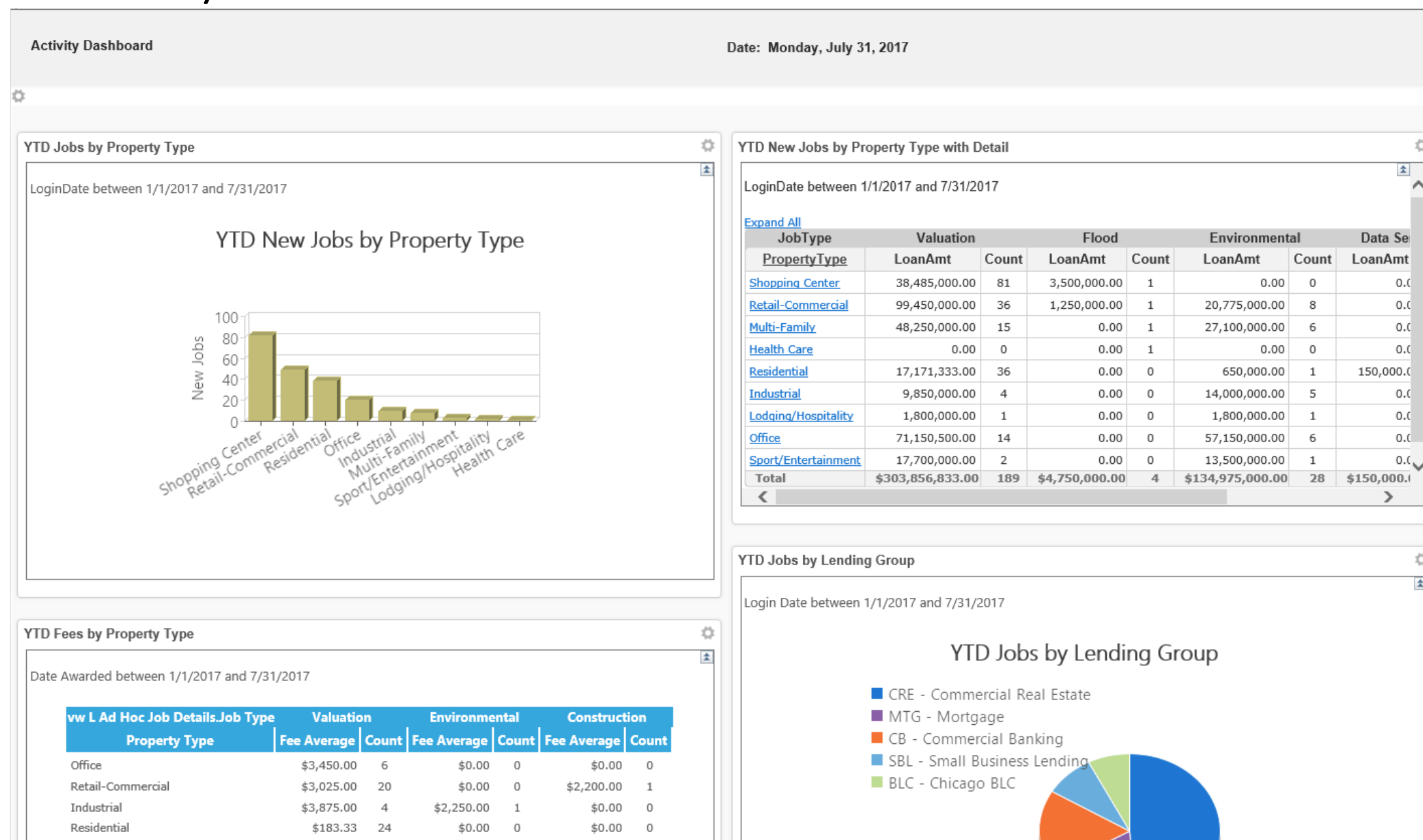
- **Ad Hoc folder structure & related permissions**

Folder structure (main tier):

- Personal Reports - accessible only to an individual user
 - Rename, Edit, Delete, Copy, Move, Schedule for all reports
 - Execute reports
- Shared Reports - accessible to anyone with access to Ad Hoc within your organization
 - Rename, Edit, Delete, Copy, Move, Schedule of reports you created
 - Copy or Schedule only for reports you did not create
 - Execute reports
- Global Reports – accessible to all Ad Hoc reports users
 - Copy only for any report in the Global folder
 - Execute reports
- Additional Folders
 - Sub-folder structures can be created in Personal and Shared folders to organize and structure your reports

RIMS Ad Hoc Reporting

- **Ad Hoc Samples (Global)**
 - Dashboards – comprised of a report definition file and sub-reports
 - If copied to Personal or Shared, MUST copy all and must re-index sub-reports
 - Activity Dashboard



RIMS Ad Hoc Reporting

- **Ad Hoc Samples (Global)**
 - Operations – Completed Tasks

Completed Tasks Report

Date: Monday, July 31, 2017
Time: 1:24:45 PM

Task Complete Date and

Completed Tasks Report

Task Job Manager Name	Project #	Lending Group	Account Officer	Borrower Name	Company #	Cost Center	Loan Amount	Project Name	Address	City	State	Property Type	Property Sub Type	Job Type	Vendor Name	
Greg Crews (JM)																
	17-000034-01-1	MTG - Mortgage	Greg Crews (AO)	Jed Clampett	123	123456	\$650,000.00	Clampett House	136 5th Ave	Belle Fourche	SD	Residential	Condominium Unit(s)	Valuation	Greg Crews (VA)	10 Ap
	16-000054-03-1	CB - Commercial Banking	Greg Crews (AO)	Sample 101, LLC	123	123456	\$2,150,000.00	Sample 101	1285 West Blvd	Montgomery	AL	Office	Medical Office	Environmental		
	16-000069-02-1	MTG - Mortgage	Greg Crews (AO)	Flinstone family	123	123456	\$658,000.00	Testing Auto	1465 Winding Trail	Duncanville	TX	Residential	Detached (single-family home)	Valuation		AF
	17-000042-02-1	MTG - Mortgage	Greg Crews (AO)	Harold Howard	123	123456	\$1,000,001.00	Howard House	3930 McGuire Way	Kennesaw	GA	Residential	Detached (single-family home)	Valuation		
	17-000066-02-1	CRE - Commercial Real Estate	Greg Crews (AO)	DemoBank, Inc.	123	123456	\$3,000,000.00	Demobank Branch #13	100 Main St	Birmingham	AL	Retail-Commercial	Free Standing Building-Bank Branch	Environmental		
	17-000066-01-1	CRE - Commercial Real Estate	Greg Crews (AO)	DemoBank, Inc.	123	123456	\$3,000,000.00	Demobank Branch #13	100 Main St	Birmingham	AL	Retail-Commercial	Free Standing Building-Bank Branch	Valuation	Greg Crews (VA)	AF
	17-000066-01-1	CRE - Commercial Real Estate	Greg Crews (AO)	DemoBank, Inc.	123	123456	\$3,000,000.00	Demobank Branch #13	100 Main St	Birmingham	AL	Retail-Commercial	Free Standing Building-Bank Branch	Valuation	Greg Crews (VA)	AF

RIMS Ad Hoc Reporting

- **Ad Hoc Samples (Global)**
 - Operations – Past Due – Vendor Reports

Past Due - Vendor Reports										Date: Monday, July 31, 2017 Time: 1:26:12 PM				
Internal External equal to 0 And taskstatus in list Contract Pending¶Contract Pending-Hold¶Contracted And Due Date less than 7/31/2017														

Past Due Reports - Grouped by Job Manager

◀ ◀ Page 1 of 4 ▶ ▶

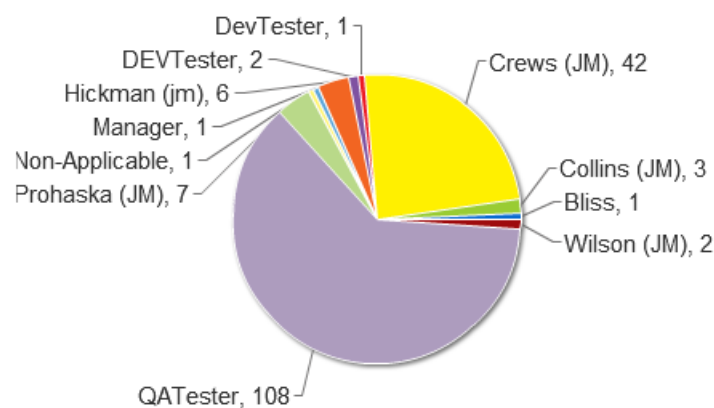
Job Type	Task JM	Days Late	Project #	Task Code	Rpt Type	Project	Lender	Lending Group	Property Type	Property Address	Status	Due Date	Vendor	Vendor Email	Vendor Phone
	747												28		
Construction															
	Greg Crews (JM)														
													1		
		251	16-000088-05-1	INSPECT		House of Blues	Greg Crews (AO)	CB - Commercial Banking	Retail-Commercial	1055 5th Ave, San Diego, CA	Contracted	11/22/2016	Greg Crews	gcrews@exactbid.com	555.555-1234
		251	16-000088-05-1	INSPECT		House of Blues	Greg Crews (AO)	CB - Commercial Banking	Retail-Commercial	1055 5th Ave, San Diego, CA	Contracted	11/22/2016	Greg Crews	gcrews@exactbid.com	555.555-1234
	Lisa Wilson (JM)														
													1		
		1587	13-000017-03-1	PCR		Test project run through	Carol Prohaska (AO)	CRE - Commercial Real Estate	Retail-Commercial	12027 N 65th Avenue, Glendale, AZ	Contracted	3/27/2013	DEV_VN12E DEVTester (Wilson)	lwilson@exactbid.com	408-361-1234
		1587	13-000017-03-1	PCR		Test project run through	Carol Prohaska (AO)	CRE - Commercial Real Estate	Retail-Commercial	12027 N 65th Avenue, Glendale, AZ	Contracted	3/27/2013	DEV_VN12E DEVTester (Wilson)	lwilson@exactbid.com	408-361-1234

RIMS Ad Hoc Reporting

- **Ad Hoc Samples (Global)**
 - Operations – Pending Orders

Pending Orders	Date: Monday, July 31, 2017 Time: 1:27:09 PM
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taskstatus in list Contract PendingContract Pending-HoldContractedContracted-Hold



Job Manager	Job Manager	Project #	Lending Group	Borrower	Property Type	Property Address	Task Code	Login Date	Due Date	Due #Days	Status
											Total Orders Outstanding 174
Carol Prohaska (JM)											
											Total Orders Outstanding 7
	Prohaska (JM)	13-000026-05	CRE - Commercial Real Estate	Business 03-29-2013	Office	125 Mixture Boulevard, San Jose, CA 95138	APR	4/22/2013	4/30/2013	-1553	Contracted
	Prohaska (JM)	13-000026-02	CRE - Commercial Real Estate	Business 03-29-2013	Office	125 Mixture Boulevard, San Jose, CA 95138	APR	3/30/2013	5/3/2013	-1550	Contracted
	Prohaska (JM)	13-000026-04	CRE - Commercial Real Estate	Business 03-29-2013	Office	125 Mixture Boulevard, San Jose, CA 95138	APR	4/8/2013	5/3/2013	-1550	Contract Pending
	Prohaska (JM)	13-000084-01	CRE - Commercial Real Estate	Lisa Wilson	Residential	12027 N 65th Ave, Sunnyvale, CA 94087	AUTO	6/3/2013	6/21/2013	-1501	Contract Pending
	Prohaska (JM)	13-000093-01	SAG - Special Assets Group	Lisa Wilson	Office	Task Due Date Schedule 2 - do not alter, Glendale, AZ 85304	APR	7/19/2013	8/1/2013	-1460	Contracted
	Prohaska (JM)	13-000013-03	CRE - Commercial Real Estate	A-One Business LLC	Office	1234 Peachtree lane, Cleveland, OH 44130	APR	3/29/2013	10/6/2016	-298	Contracted

RIMS Ad Hoc Reporting

- **Ad Hoc Samples (Global)**
 - Staff – Job Manager Performance – Task Equalization
 - Calculate ‘normalized’ measures; factors include Loan Amt, Property Type, Tenancy, Status, Internal/External

Job Manager Performance II - Task Equalization

Date: Monday, July 31, 2017
Time: 1:31:57 PM

Completed Tasks Report

Task Job Manager Name	Internal / External	Project #	Job Type	Lending Group	Loan Amount	Project Name	Address	Property Type	Property Size	Year Built	Property Tenancy	Property Status	Vendor Name	Task Code	Fees	Due Date
14																
Greg Crews (JM)																
		11			\$32,358,001.00											
	External															
		5														
		17-000034-01-1	Valuation	MTG - Mortgage	\$650,000.00	Clampett House	136 5th Ave, Belle Fourche, SD	Residential - Condominium Unit(s)			Owner Occupied 100%	Existing	Greg Crews (VA)	1073 Appraisal	\$450.00	3/18/201
		17-000066-01-1	Valuation	CRE - Commercial Real Estate	\$3,000,000.00	Demobank Branch #13	100 Main St, Birmingham, AL	Retail-Commercial - Free Standing Building-Bank Branch	4500 SF	2000	Owner Occupied 100%	Existing	Greg Crews (VA)	APR	\$3,500.00	7/26/201
		16-000048-02-1	Environmental	CRE - Commercial Real Estate	\$2,000,000.00	Friday Tacos	Main St, Haines, AK	Retail-Commercial - Restaurant-Fast Food	2500 SF	2000	Owner Occupied 100%	Existing		P_1		6/23/201
		16-000069-02-1	Valuation	MTG - Mortgage	\$658,000.00	Testing Auto	1465 Winding Trail, Duncanville, TX	Residential - Detached (single-family home)		2000	Owner Occupied 100%	Existing		APR_RES	\$450.00	11/17/20
		17-000063-01-1	Valuation	CRE - Commercial Real Estate	\$7,200,000.00	Thursday Afternoon	8545 Highway 79, Pinson, AL	Retail-Commercial - Free Standing Building-Big Box	56000 SF	2000	Single Tenant Investor	Existing	Greg Crews (VA)	APR	\$3,500.00	7/3/2017
	Internal															
		6														

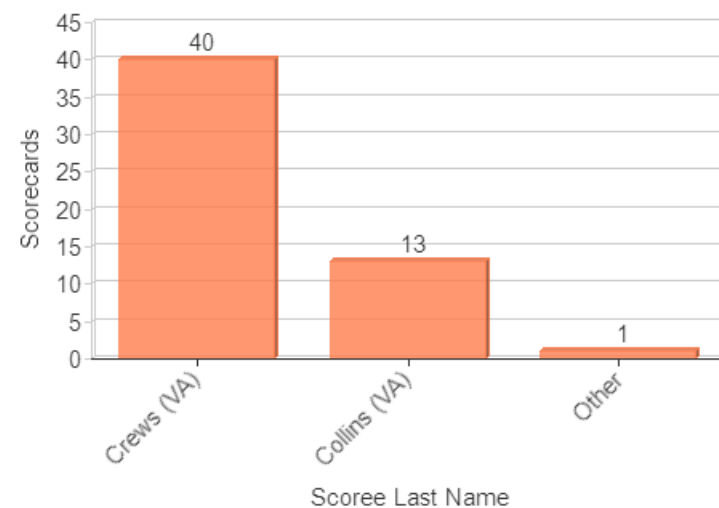
RIMS Ad Hoc Reporting

- **Ad Hoc Samples (Global)**
 - Vendors – Vendor Scorecard Summary

Vendor Scorecard Summary - Appraisal

Date: Monday, July 31, 2017
Time: 1:36:03 PM

Scorecards per Vendor (75th Percentile)



Scored Vendor	Project	Task Code	Project Name	Property Type	Address	City	State	Reviewer	Rating	Net Turn (Days)	Gross Turn (Days)	Variance (Days)	Late Report
	54								4	19	19	-6	
Carol Prohaska (V)													
	1								2	0	0	-1	
	14-000136-10	APR_R_TECH	Jojo's Convenience Mart	Retail-Commercial	121 Walnut Street	Walnut Creek	CA	Crews (JM), Greg C	2	0	0	-1	No
Greg Crews (VA)													
	40								4	8	8	-21	
	15-000048-01	APR_R_TECH	Westchester Shopping Center	Shopping Center	1753 E Main Ave	Puyallup	WA	Greg Crews (JM)	3	0	0	-19	No
	15-000077-01	APR_R_TECH	Samples, Inc.	Industrial	200 E Randolph St Chicago IL 60601 United States	Chicago	IL	Greg Crews (JM)	4	61	61	-1	No
	15-000089-				1225 Farmer City IL 61842 United								

RIMS Ad Hoc Reporting

- **Ad Hoc Samples (Global)**
 - Vendors – Vendor Utilization Summary

Vendor Utilization Summary				Date: Monday, July 31, 2017 Time: 1:37:26 PM			
Vendor	Company	Project #	RFP Date	Direct Award?	Award Date	Awarded This Vendor	Award Fee
			RFPs Received - 66		Awards Received - 18		\$52,900.00
Bernie Boise (Con-W)							
			RFPs Received - 1		Awards Received - 0		\$0.00
	Engineers R Us	17-000043-21-1	5/10/2017			No	\$0.00
Brian Birmingham							
			RFPs Received - 2		Awards Received - 0		\$0.00
		17-000043-21-1	5/10/2017			No	\$0.00
		17-000059-01-1	5/17/2017	No	5/19/2017	No	\$0.00
Carol Prohaska (V)							
			RFPs Received - 4		Awards Received - 0		\$0.00
	ExactBid Inc.	17-000045-01-1	4/11/2017	No	4/11/2017	No	\$0.00
	ExactBid Inc.	17-000049-01-1	5/1/2017	No	7/27/2017	No	\$0.00
	ExactBid Inc.	17-000050-01-1	5/5/2017	No	5/5/2017	No	\$0.00
	ExactBid Inc.	17-000054-01-1	5/11/2017	No	5/11/2017	No	\$0.00
Christopher Columbus (Con-E)							
			RFPs Received - 1		Awards Received - 0		\$0.00
	Engineers R Us	17-000043-21-1	5/10/2017			No	\$0.00
Connie Cleveland							
			RFPs Received - 4		Awards Received - 0		\$0.00
	Ohio Valuation Co	17-000043-22-1	5/23/2017			No	\$0.00
	Ohio Valuation Co	17-000050-01-1	5/5/2017	No	5/5/2017	No	\$0.00
	Ohio Valuation Co	17-000062-05-1	5/23/2017	No	5/23/2017	No	\$0.00
	Ohio Valuation Co	17-000066-01-1	6/28/2017	No	6/28/2017	No	\$0.00
Greg Crews							
			RFPs Received - 5		Awards Received - 1		\$2,200.00
		17-000043-21-1	4/18/2017	Yes	7/27/2017	No	\$0.00
		17-000043-21-1	5/10/2017			No	\$0.00
		17-000049-01-1	5/1/2017	No	7/27/2017	No	\$0.00
		17-000051-03-1	5/17/2017			No	\$0.00

RIMS Ad Hoc Reporting

- **Modifying a Global Report**
 - Copy selected report to your Personal folder
 - Copy will be the only option to you for a Global report; these reports are provided by ExactBid to assist you in building your own reports

Home > Reports > AdHoc Reporting










Reports

About | Help

Personal Reports | Shared Reports | **Global Reports**

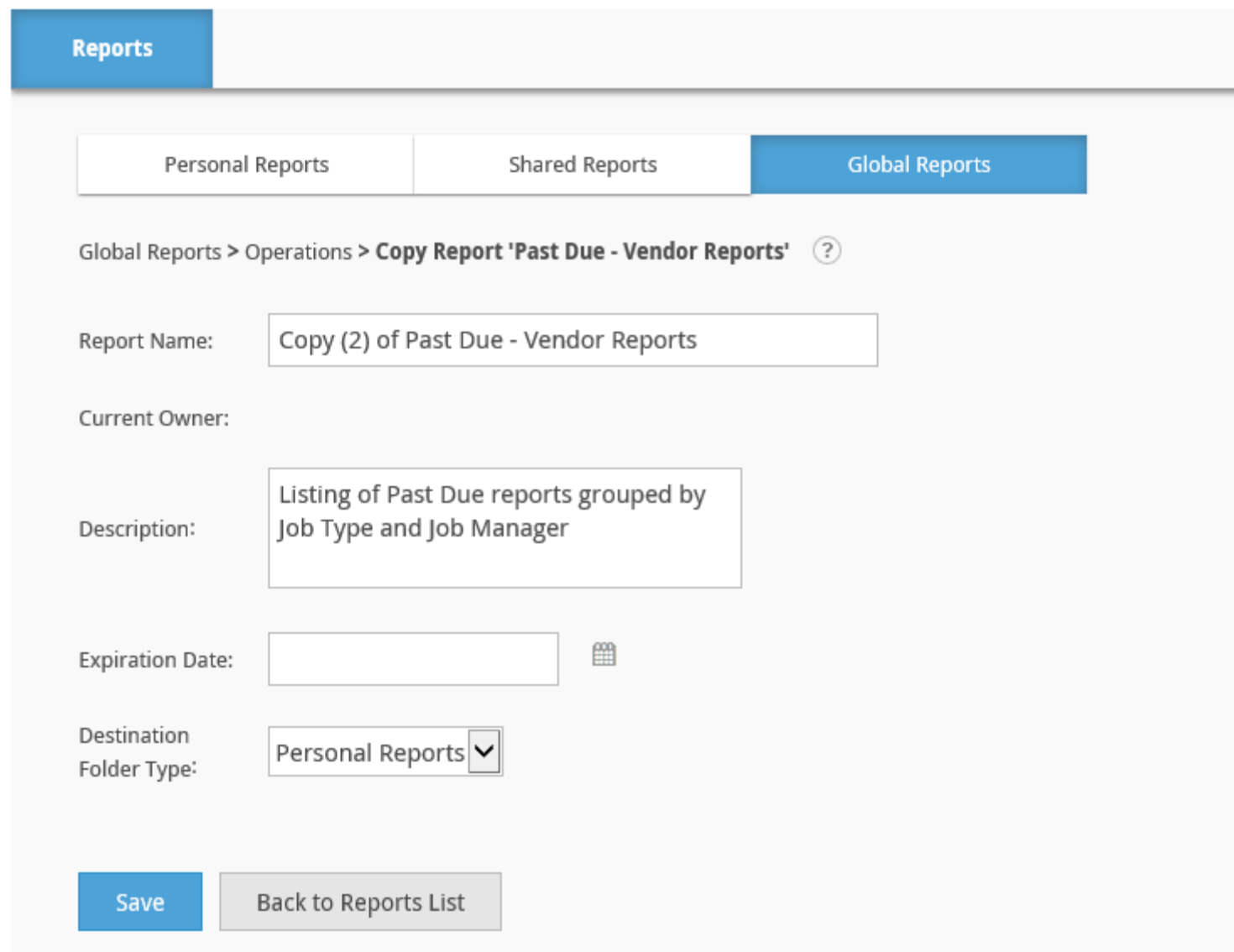
Global Reports > Operations ?

Up Copy

<input type="checkbox"/>	Name	Last Modified	Actions
<input type="checkbox"/>	 Completed Tasks Report	6/9/2017 9:11 AM	More >
<input type="checkbox"/>	 Completed Tasks Report v2	2/7/2017 1:56 PM	More >
<input type="checkbox"/>	 Invoices Processed - Exception Report Invoices processed through Batch Invoice with an apparent underpayment (Task Fee > Invoice Paid to Date)	8/8/2017 8:47 AM	More >
<input type="checkbox"/>	 Outsourced Review Fee Summary A summary of assignments completed by external Job Managers (VJMs) during the specified period. ONLY Task Codes with Enable VJM Fee = True will be included.	6/28/2017 12:26 PM	More >
<input type="checkbox"/>	 Past Due - Internal Reviews/Tasks Listing of Past Due INTERNAL Tasks grouped by Job Type and Job Manager	7/20/2017 11:15 AM	More >
<input type="checkbox"/>	 Past Due - Vendor Reports  Listing of Past Due reports grouped by Job Type and Job Manager	6/24/2017 8:21 AM	More > Copy
<input type="checkbox"/>	 Pending Orders A summary of pending orders by Job Manager	7/17/2017 12:24 PM	More >
<input type="checkbox"/>	 Pending Reviews This report summarizes all pending reviews by Job Manager.	7/17/2017 12:45 PM	More >

RIMS Ad Hoc Reporting

- **Modifying a Global Report**
 - Copy selected report to your Personal folder (continued)
 - You'll be prompted to change the name, description and destination of the report to be copied (Personal or Shared folders)
 - Make your changes / selections and click Save to copy the report



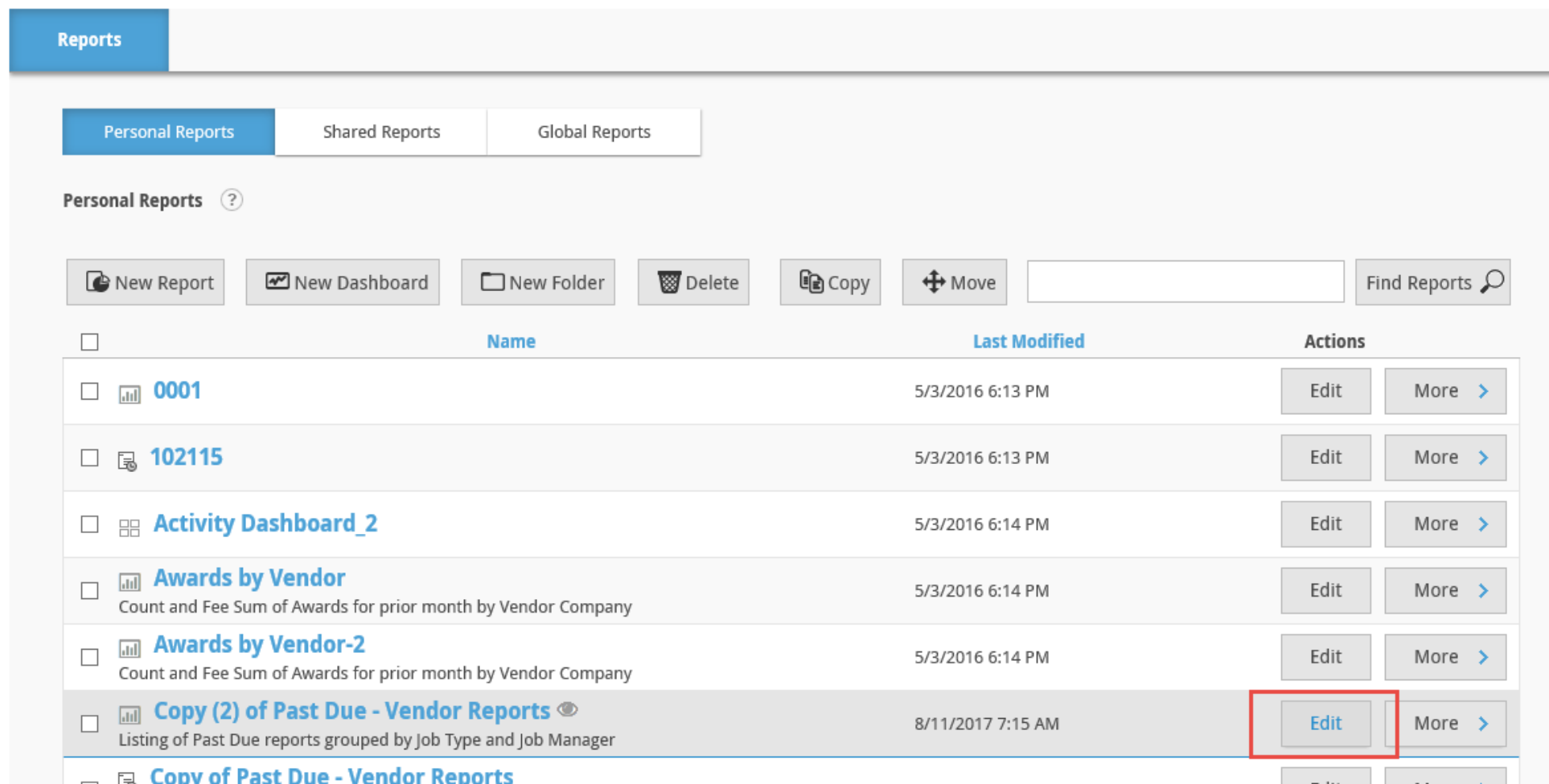
The screenshot displays the 'Reports' section of the RIMS Ad Hoc Reporting interface. It features three tabs: 'Personal Reports', 'Shared Reports', and 'Global Reports'. The 'Global Reports' tab is active, showing a breadcrumb trail: 'Global Reports > Operations > Copy Report 'Past Due - Vendor Reports'' with a help icon. The form contains the following fields:

- Report Name:** A text input field containing 'Copy (2) of Past Due - Vendor Reports'.
- Current Owner:** A label with no associated input field.
- Description:** A text input field containing 'Listing of Past Due reports grouped by Job Type and Job Manager'.
- Expiration Date:** A text input field with a calendar icon to its right.
- Destination Folder Type:** A dropdown menu currently set to 'Personal Reports'.

At the bottom of the form are two buttons: a blue 'Save' button and a grey 'Back to Reports List' button.

RIMS Ad Hoc Reporting

- **Modifying a Global Report**
 - Navigate to the folder where you copied the report and click Edit
 - The report is now in edit mode and any changes desired can be applied, including changes to data sources, filters, selected columns and formatting.
 - Save your changes when satisfied and run the report to verify your intended results.

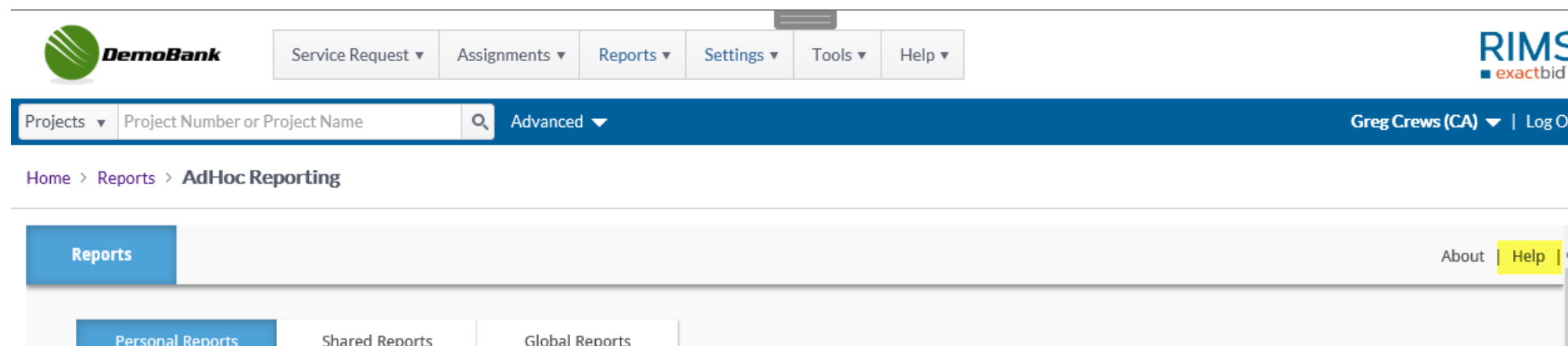


The screenshot displays the 'Reports' section of the RIMS interface. At the top, there are tabs for 'Personal Reports', 'Shared Reports', and 'Global Reports'. Below these, a toolbar contains icons for 'New Report', 'New Dashboard', 'New Folder', 'Delete', 'Copy', 'Move', and a 'Find Reports' search bar. A table lists various reports with columns for 'Name', 'Last Modified', and 'Actions'. The report 'Copy (2) of Past Due - Vendor Reports' is highlighted, and its 'Edit' button is circled in red.

	Name	Last Modified	Actions
<input type="checkbox"/>	0001	5/3/2016 6:13 PM	Edit More >
<input type="checkbox"/>	102115	5/3/2016 6:13 PM	Edit More >
<input type="checkbox"/>	Activity Dashboard_2	5/3/2016 6:14 PM	Edit More >
<input type="checkbox"/>	Awards by Vendor Count and Fee Sum of Awards for prior month by Vendor Company	5/3/2016 6:14 PM	Edit More >
<input type="checkbox"/>	Awards by Vendor-2 Count and Fee Sum of Awards for prior month by Vendor Company	5/3/2016 6:14 PM	Edit More >
<input type="checkbox"/>	Copy (2) of Past Due - Vendor Reports Listing of Past Due reports grouped by Job Type and Job Manager	8/11/2017 7:15 AM	Edit More >
<input type="checkbox"/>	Copy of Past Due - Vendor Reports		

RIMS Ad Hoc Reporting

- **Report Building Basics**
 - Ad Hoc Help (Logi)
 - This training session and additional materials will be available by clicking Help on the RIMS main menu
 - Additionally, when in the Ad Hoc reporting window, click the Help link on the 'Reports' header row for the page, highlighted in the image below



RIMS Ad Hoc Reporting

- **Report Building Basics**
 - Ad Hoc Help (Logi)
 - The Logi Ad Hoc help content will open in a new tab or window
 - The menu at the left will help you navigate through the features contained in the tool
 - Visit the 'Getting Started' section at the top of the menu for a good orientation to Ad Hoc's layout and basic terminology



The screenshot displays the Logi11 Ad Hoc Reporting interface. At the top, there is a header bar with the Logi11 logo and an 'ONLINE HELP' button. Below the header, a sidebar menu on the left lists various sections: Getting Started, Data Sources, Creating Data Columns, Tables, Crosstabs, Adding Charts & Graphs, Style & Formatting, Export Options, Running Reports, Managing Reports, Dashboards, and Multiple Data Sources. The main content area on the right is titled 'Logi 11 Ad Hoc Reporting' and contains two paragraphs of text. The first paragraph describes the tool as a web-based reporting utility designed for building, sharing, and analyzing business intelligence reports. The second paragraph highlights the user-friendly interface and full-featured reporting tools, including the ability to create interactive charts and graphs, publish reports, and use a Report Builder. A list of features follows, including selecting views and columns, building database queries, selecting graphical templates, adding parameters, including interactive paging, sharing reports, editing existing reports, creating archives, subscribing to reports via email, and exporting to various formats.

Logi11 Ad Hoc Reporting

ONLINE HELP

Logi 11 Ad Hoc Reporting

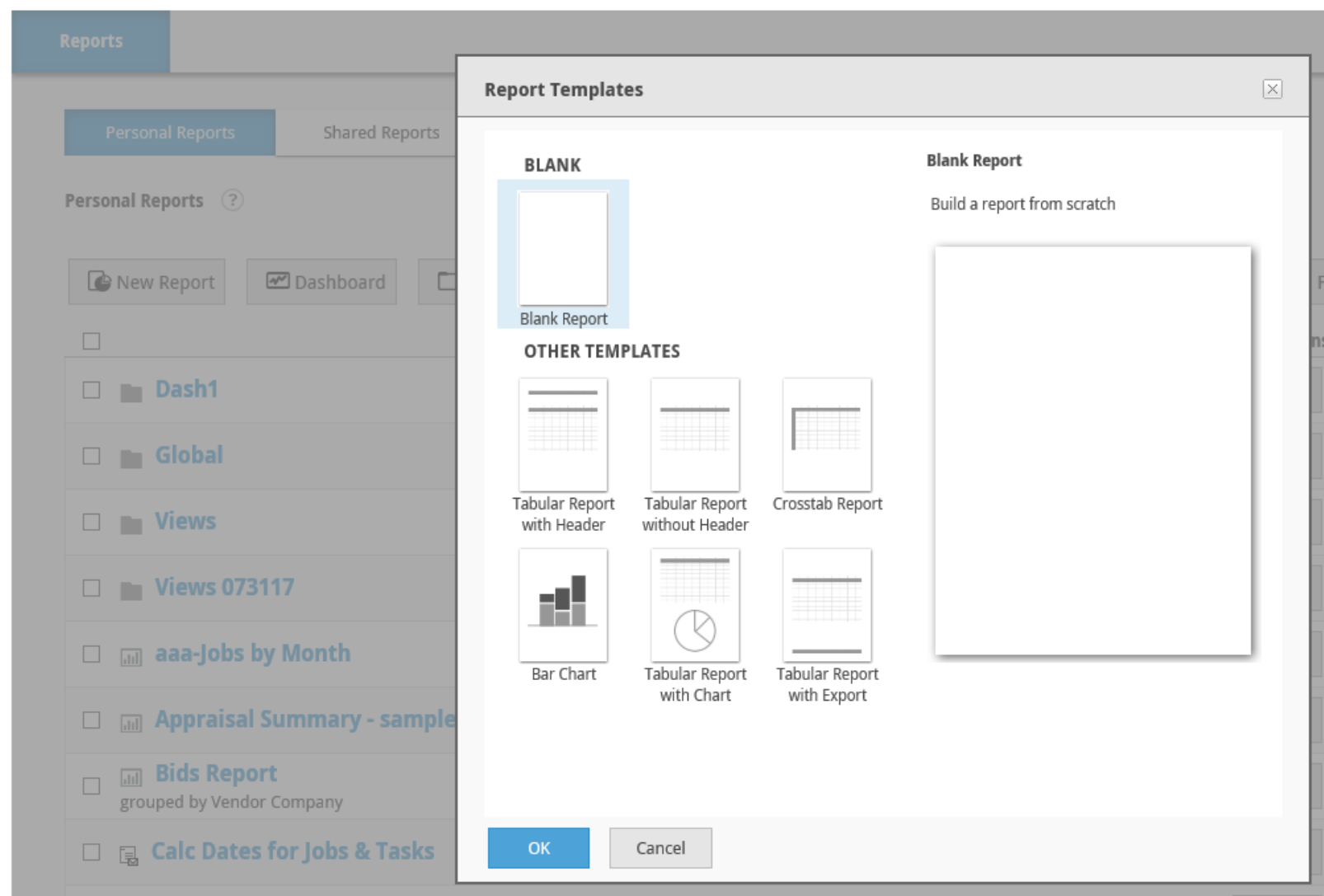
Logi Ad Hoc Reporting is a web-based reporting utility designed to make building, sharing, and analyzing business intelligence reports a quick and easy process, even for non-technical users. With Logi Ad Hoc Reporting, there is no need for downloadable report viewers, and no time or assistance is required from technical developers to easily create professional, informative reports.

Logi Ad Hoc Reporting delivers a user-friendly interface and full-featured reporting tools. Users can create interactive charts and graphs, as well as publish comprehensive reports to share with others. An easy-to-use Report Builder walks you through all the steps required to create comprehensive and interactive reports. Here are just a few of the many features that come with Logi Ad Hoc Reporting:

- * Select views and columns for reports
- * Build database queries
- * Select graphical report templates
- * Add parameters to filter report data
- * Include interactive paging, search functionality and printing options
- * Share reports with other users
- * Edit existing reports
- * Create an archive for each report
- * Subscribe to receive reports via e-mail
- * Export to Excel. PDF. Word. XML or CSV formats

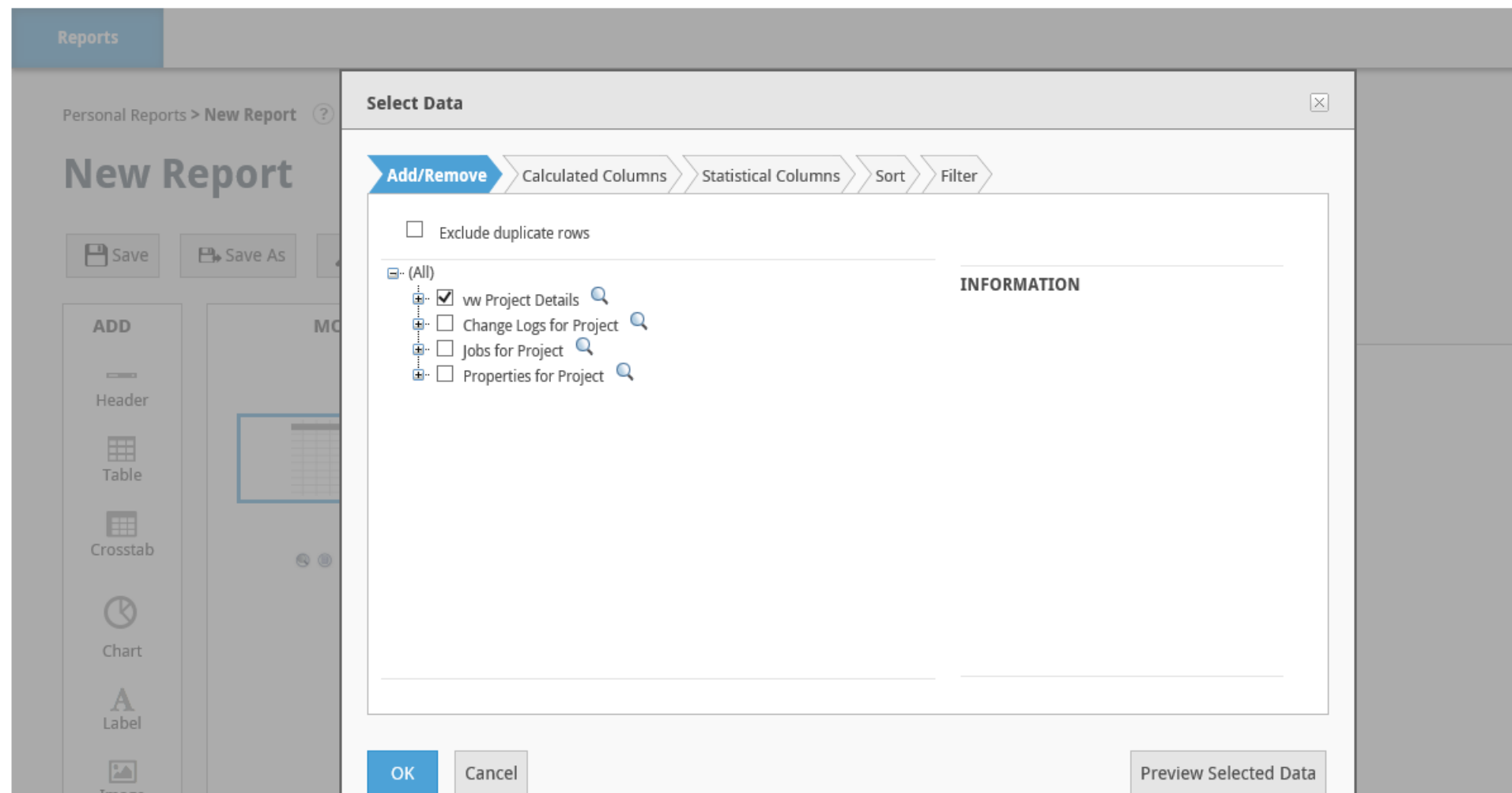
RIMS Ad Hoc Reporting

- **Report Building Basics**
 - Select Template
 - Click New Report (report will be created in the folder you've selected)
 - Choose a template; not restrictive, just a starting point



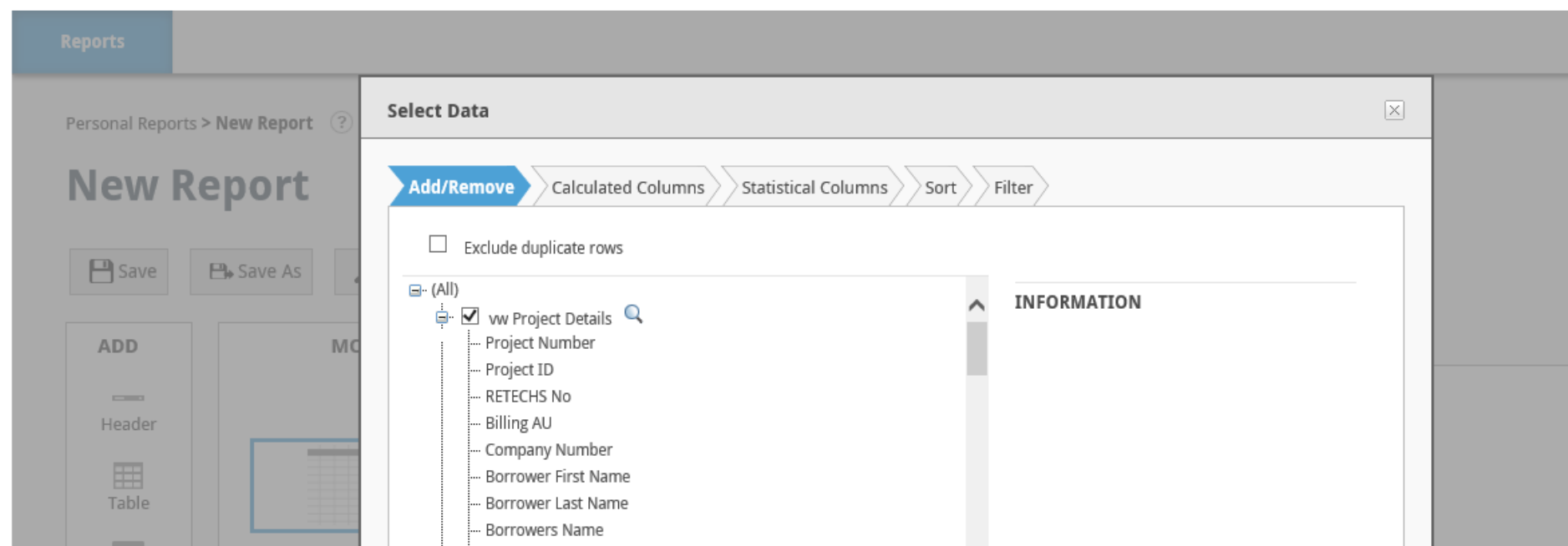
RIMS Ad Hoc Reporting

- **Report Building Basics**
 - Select Data Source(s) – hierarchical
 - First data source selection will filter available views to only those associated with that first selection. Project Details is the TOP workflow-related view; good place to start



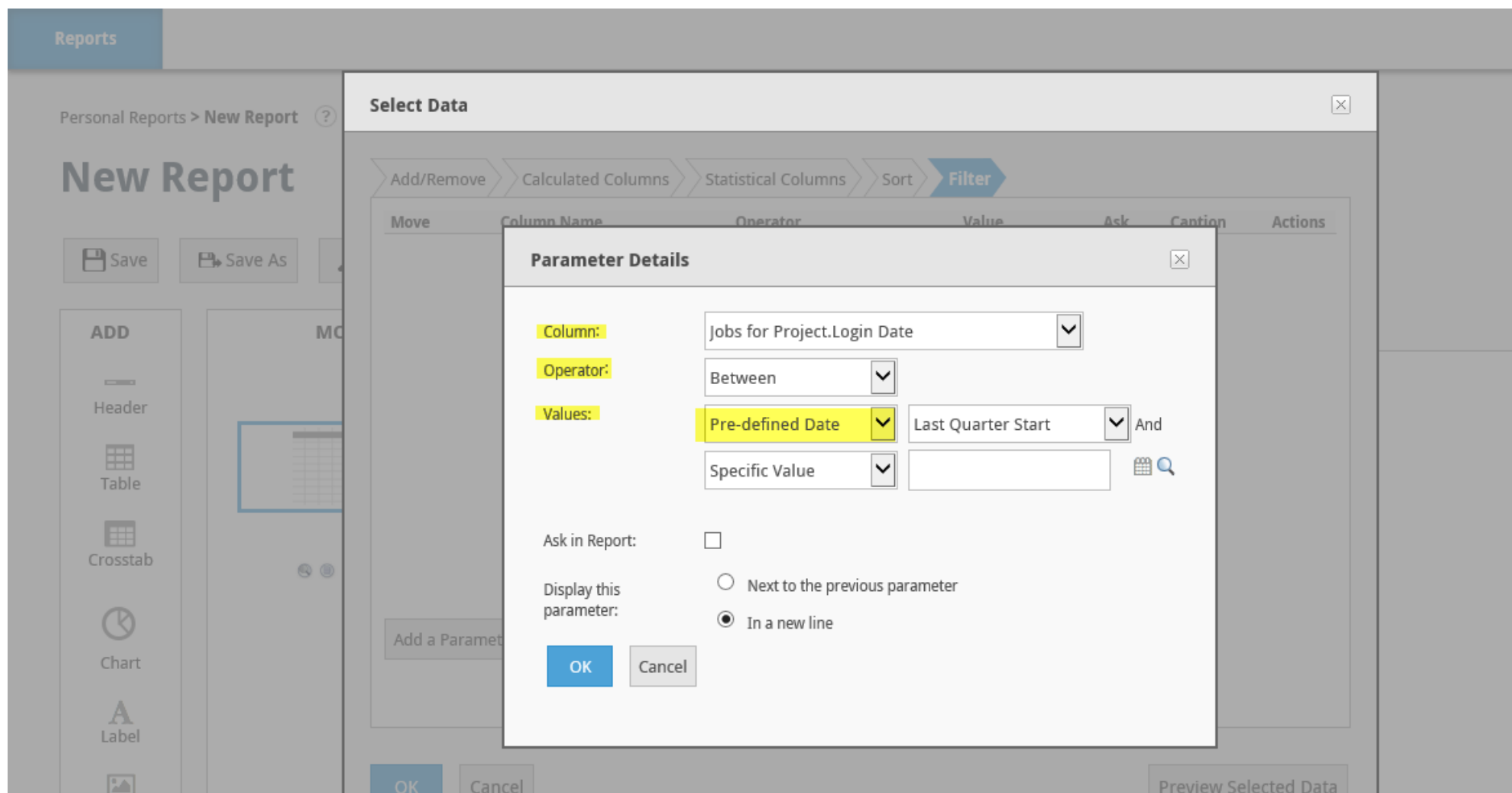
RIMS Ad Hoc Reporting

- **Report Building Basics**
 - Select Data Source(s) – hierarchical (continued)
 - Click the '+' to the left of a view to see the available fields within that collection.
 - Magnifying glass icon shows representative data for most views.



RIMS Ad Hoc Reporting

- **Report Building Basics**
 - Define Filter(s)
 - Reports will NOT run without one or more filters
 - Use filters to limit data set and focus your results
 - Filter on any field that is part of the selected views
 - Operator and value options based on selected field (Column)
 - Ask in Report – allows changes (prompt) at run-time



The screenshot displays the 'New Report' interface in the RIMS Ad Hoc Reporting tool. The main window is titled 'New Report' and includes a 'Select Data' tab. A 'Parameter Details' dialog box is open, showing the configuration for a filter. The dialog has a table with columns: Column Name, Operator, Value, Ask, and Actions. The 'Column Name' is 'Jobs for Project.Login Date', the 'Operator' is 'Between', and the 'Value' is 'Last Quarter Start'. The 'Ask' column is checked, and the 'Actions' column has a search icon. Below the table, there are options for 'Ask in Report' (checkbox) and 'Display this parameter:' (radio buttons for 'Next to the previous parameter' and 'In a new line'). The 'In a new line' option is selected. The dialog also has 'OK' and 'Cancel' buttons.

Column Name	Operator	Value	Ask	Actions
Jobs for Project.Login Date	Between	Last Quarter Start	<input checked="" type="checkbox"/>	

Ask in Report: ☐

Display this parameter:

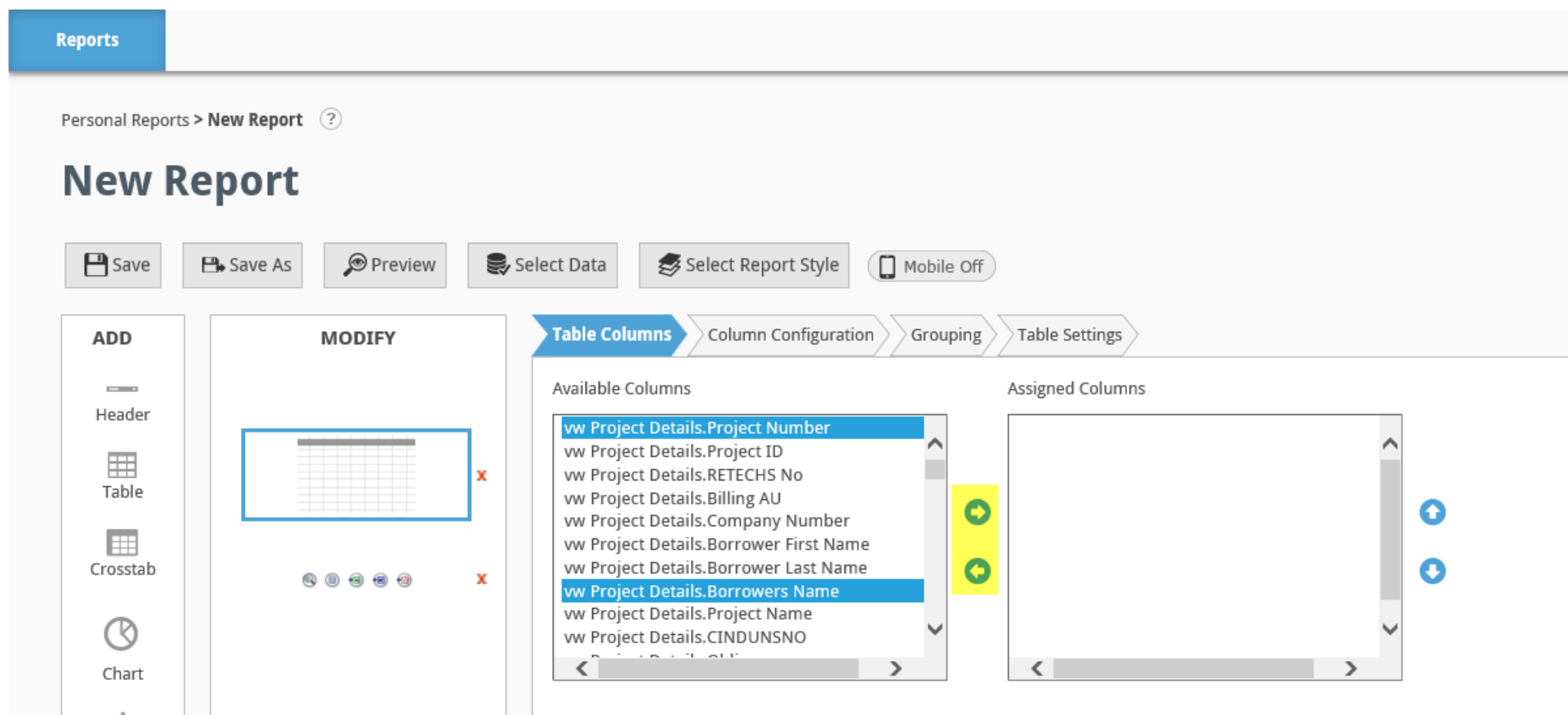
☐ Next to the previous parameter

☒ In a new line

OK Cancel

RIMS Ad Hoc Reporting

- **Report Building Basics**
 - Select Columns (typical Table example)
 - Select or multi-select fields in the first list, then move to right list with provided arrows; remove a selected column the same way in reverse



Reports

Personal Reports > **New Report** ?

New Report

Save **Save As** **Preview** **Select Data** **Select Report Style** **Mobile Off**

ADD **MODIFY**

Header
Table
Crosstab
Chart

Table Columns Column Configuration Grouping Table Settings

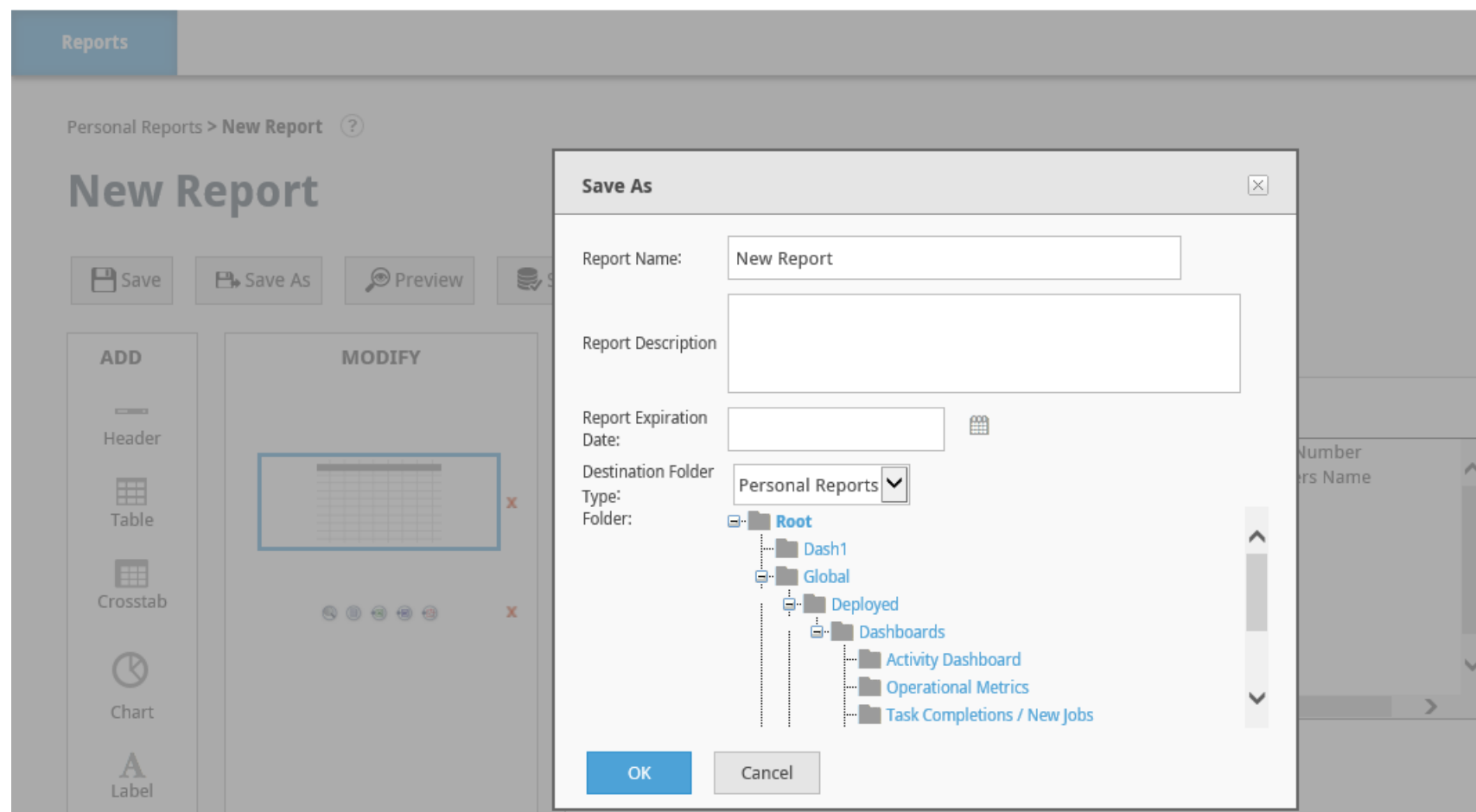
Available Columns

- vw Project Details.Project Number
- vw Project Details.Project ID
- vw Project Details.RETECHS No
- vw Project Details.Billing AU
- vw Project Details.Company Number
- vw Project Details.Borrower First Name
- vw Project Details.Borrower Last Name
- vw Project Details.Borrowers Name
- vw Project Details.Project Name
- vw Project Details.CINDUNSNO

Assigned Columns

RIMS Ad Hoc Reporting

- **Report Building Basics**
 - Save your report
 - Once at least one column has been selected you can save your report
 - Click Save or Save As from the button menu and name your report
 - You may change the destination location at this time (Personal or Shared) including any existing sub folders previously defined.



What's Next?

- Next RIMS University Session will cover Notice Management and will be held on **Tuesday, September 26th at 4pm EDT** (Invite coming soon)
- If you have a suggestion for a future training topic email adanes@exactbid.com
- Have additional questions about Sampling? Email support@exactbid.com or submit a RIMS support ticket on our website



Thank You