



How to use Qdabra's Report Builder

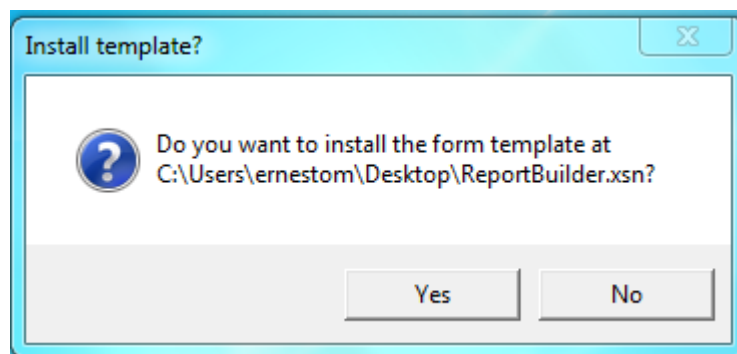
This document will guide you through the installation and usage of Qdabra's Report Builder.

INSTALL REPORT BUILDER

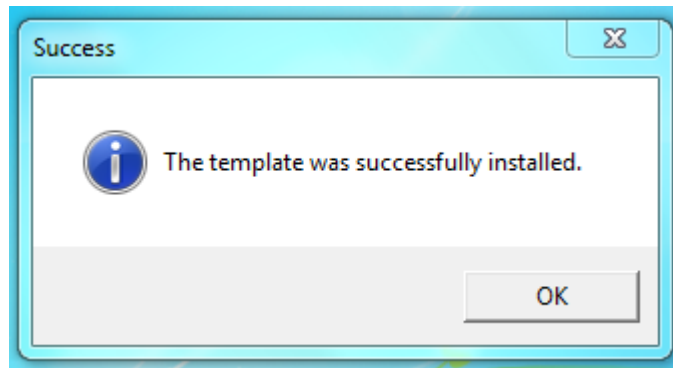
1. Use Internet Explorer to navigate to <http://servername/qdabrawebservice/>.
2. Click the first link, labeled **DBXL Administration Tool**. The DBXL Admin Tool (DAT) will open in InfoPath.
3. Click New Configuration and create a new document type called ReportBuilder_QDABRA. In the General tab, there's a checkbox for URN solutions. Please check this before saving.
4. Attach the Report Builder XSN and save the Document Type.
5. Download the XSN back into your local drive.
6. Make sure that InfoPath is not running (close all active InfoPath windows).

Note that sometimes, even after closing InfoPath, a process will remain active in the background. You can check this via the Task Manager.

7. Drag the **ReportBuilder** XSN (the one you downloaded from DAT) onto the **FormInstaller** icon. Click **Yes** when prompted.



8. **FormInstaller** will install the **ReportBuilder** form via a dialog. Click **OK** when done.

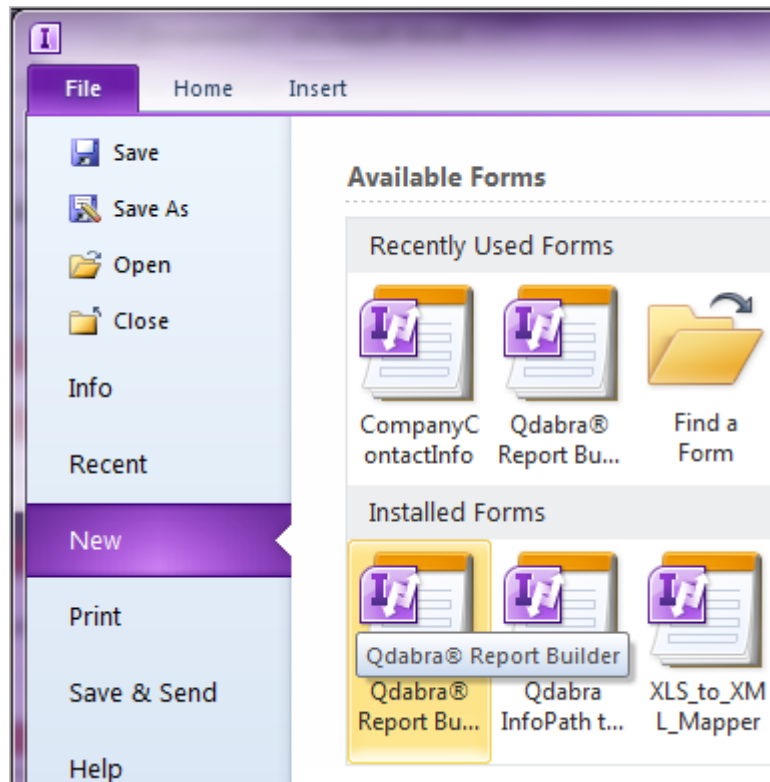


CREATE A NEW REPORT

The following steps will show you how to create a brand new report.

9. Open InfoPath Filler.
10. Click **New**.
11. Select **Qdabra Report Builder** listed under the **Installed Forms** section.





12. Under Report Name, provide a name or title for this report. If you'd like, provide a Description as well.
13. In the **General** section of the Report Builder tool, enter the Web Service URL Prefix.
14. Enter **QdabraWebService** as the Web Service Name and then click **Connect**.

Qdabra FormsBoard

Qdabra Report Builder

Report Name:

My report

[Save Changes](#)

Report Description:

My report description

General

Query All

Connection Information

Query Target	Web Service URL Prefix (scheme://host-name:port)	Web Service Name (i.e. QdabraWebService)	
☒ DBXL ☐ SharePoint	http://servername	/ QdabraWebService	Connect

15. Click **Add Query > Create** in the *Queries* table.


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Queries

Document Type

Create

☐ Add Query

16. Select the desired document type from the dropdown.

General Query All

Query Information

Document Type

LCS_Reviews

17. Under **Fields to Retrieve**, click on the Schema icon (). This will display the custom task pane at the right.

18. Double-click on the root node (for example, my:myFields).

19. Under **Field**, click **Insert Item** and start adding the fields you wish to retrieve. If desired, give each field an alias, which will become the label/title in the Excel report for that particular field/column. Note that we can't use spaces in aliases.

Fields to Retrieve

Base Path

/my:expenseReport

Field	Alias
my:employee/my:name	
my:manager/my:managerName	
my:reportDate	
my:items/my:total	

☐ Insert item

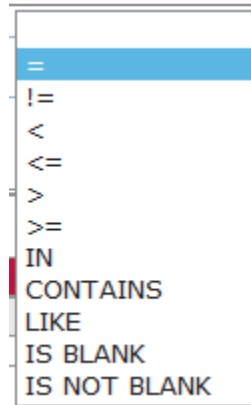
20. If you have a large number of records in the document type, adding a filter is highly recommended. In the **Filter** section, make a selection in the dropdown:

- **Simple Comparison:** For this type of filter, you'll compare ONE form field against ONE value.
- **Complex Filter:** For this type of filter, you'll compare two or more fields.

21. Select **Simple Comparison** from the dropdown.



22. Click on the Schema selector icon () to load the InfoPath form schema in the taskpane. Double click on the field you wish to use for your filter. In the middle dropdown select the desired comparison type. In the third column, enter the value for your filter.



23. Click **Perform Query** – you'll be taken to the *Query All* tab.
24. Click on the left arrow key () to expand and see the query result. If the results look OK, continue with the steps below. If you need to change the columns returned or the filter, click **Edit Query**, and return to previous steps to edit the query.

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Qdabra FormsBoard
Qdabra Report Builder

Report Name:
My report

Report Description:
My report description

Save Changes

General Query All

Returned Query Data

Documents [Specify Export Workbook](#) [Export All Queries to Excel](#)

Document Type: MUTCD_Codes [Edit Query](#) ▼

docId	Code	Description
238	CD-1	Evacuation Route
239	CD-2	Area Closed
240	CD-3	One Traffic Regulation Post

25. Click **Export All Queries to Excel**. In Excel save the spreadsheet to a desired location and with a desired name.

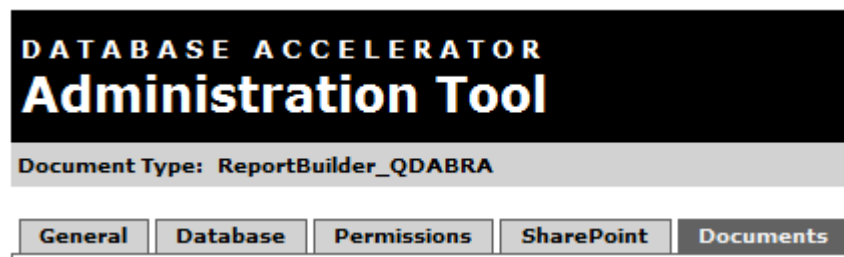


26. In Excel, you can create a **New Sheet** to perform calculations or use Pivot tables. However, you must leave the tab original sheet (created by Report Builder) intact.
27. Close Excel and return to Report Builder.
28. Modify your query, for example, by adding a filter. Click **Perform Query** again.
29. Click **Specify Export Workbook**, and enter the full file path to the spreadsheet saved above.
30. Click **Insert Item**, and match the **Sheet Name** (on the left) to the **Query Name** (to the right). This allows Report Builder to update the data on the existing Excel sheet without altering any other sheets you may have added.
31. Click **Export All Queries to Excel**. You'll notice that the original sheet will still be there, though refreshed with the data from the new filter. The sheet we added earlier is also still there, and updated with the new calculations.
32. When finished, click **Save Changes** to store this report in DBXL.

OPEN THE EXISTING REPORT

The following steps will show you how to update an existing report.

33. Use Internet Explorer to navigate to <http://servername/qdabrawebservice/>.
34. Click the first link, labeled **DBXL Administration Tool**. The DBXL Admin Tool (DAT) will open in InfoPath.
35. Click **Edit** on the Report Builder document type.
36. Click on the **Documents** tab.



37. In the **Document** table, click on **Open** for the Report. This will open the Report Builder form and the report you saved earlier in this document.
38. You can now edit the query and then click the **Query All** tab.



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39. Check that the **Workbook location** is still correct for your computer.

40. Click **Export All Queries to Excel**. This will open Excel and load the latest data into the existing sheet.

If you have another sheet with calculations or Pivot tables, Report Builder updates the sheet that contains the raw data, allowing you to simply refresh the pivot table data and obtain an updated set of calculations.

If you have questions about the information in this document, please contact us via Support@Qdabra.com for assistance.

