

AMS Reports Module



The Reports Tab opens to the View Reports screen. The user can search for reports alphabetically or can use the Categories tab to limit the number of available reports. These reports are the most commonly used reports and cannot be edited by the user.

The screenshot shows a web browser window displaying the In Circuit Reports module. The page title is "Reports - Windows Internet Explorer". The browser address bar shows a URL starting with "http://demo2.incircuit.com". The page header includes the In Circuit logo and navigation links: Home, Help, Support, Sign Out. Below the header is a navigation menu with tabs: Home, Assets, Contacts, Transfers, Disposals, Counter Sales, Federal Receipts, Federal Donations, Live Auction, Approvals, Users, Admin, Reports. The "Reports" tab is active. The main content area displays a table of reports with columns: Run, Edit, Report Name, Report Desc, and Report Type. A left sidebar contains a "Categories" menu with various report categories like ADAM, Asset Reports, Auction Reports, etc. The table lists 20 different report types, such as "00 - State Active Assets", "ADEM Accounting", "ADEM Scan", etc., each with a "Run" button and a "Report Type" (Native, Extension, or Miscellaneous).

Run	Edit	Report Name	Report Desc	Report Type
▶	✗	00 - State Active Assets	00 - State Active Assets	Native
▶	✗	ADEM Accounting	ADEM Accounting Report	Native
▶	✗	ADEM Scan	ADEM (John - Scan) Report	Native
▶	✗	Account Eligibility	List of donee customers requiring re-certification	Extension
▶	✗	Account Report	List of donees and their suspension statuses	Extension
▶	✗	Accounts by County	List of donees in a specific county	Extension
▶	✗	Asset Report (by Asset Number)	Standard Asset Report sorted by Asset Number	Native
▶	✗	Asset Report (by Bar Code)	Assets sorted by Bar Code	Native
▶	✗	Asset Report (by Location)	Assets sorted by County, Building, Room	Native
▶	✗	Asset Report (by Serial Number)	List of assets sorted by serial number	Native
▶	✗	Asset Report with Bar Code, Make, Model	List of assets with Bar Code, Make, Model	Native
▶	✗	Asset Report with County, Building, Room	List of assets with County, Building, Room	Native
▶	✗	Asset Report with Make and Model	List of assets with Make and Model fields	Native
▶	✗	Asset Report with Make, Model, PersRep	List of assets with Make, Model, and Person Responsible (Landscape)	Native
▶	✗	Assets by Agency Fund	List of assets sorted by Agency Fund	Native
▶	✗	BS Account Report	List of assets with BS Account information	Native
▶	✗	Bar Code Search	Bar Code Search	Native
▶	✗	Comptroller Summary	List of total assets, by department, that are missing State Fund or Activity	Extension
▶	✗	Comptroller Summary \$5000	List of total assets \$5000 and over, by department, missing State Fund or Activity	Extension
▶	✗	Comptroller's Activity List	List of valid Activity codes from Comptroller's office	Extension
▶	✗	Comptroller's Class Report	List of all your assets that are missing a class	Extension
▶	✗	Comptroller's Class Report - \$5000	List of all your assets \$5000 and over that are missing a class	Extension
▶	✗	Comptroller's State Fund & Activity Report	List of all your assets that are missing a State Fund or Activity	Extension

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The second option is "Create New Report". With so many searchable fields of information in AMS, creating a report can be done in numerous ways by using all types of information. One of the easiest ways to create a new report is by copying an existing report by changing the name, then click Copy Report, then Save Report after you have inserted the Filter Operators that are needed. However, there are too many different reports to be covered by this guide.

Filter Columns

The filter column will list all of the fields on an Asset Record, Equipment Record, or a Vehicle Record. The filter column allows you to choose the field on which the filter will be applied.

Filter Operators

Equal: This will match assets where the field value is exactly equal to the value you specify in the Filter Expression field. For example, if you choose the Status field and enter Active in the filter expression, then only active assets will be included.

Does not equal: This will match assets where the field value is not equal to the value you specify in the Filter Expression field. For example, if you choose the Status field and enter Active in the filter expression, then active assets will be excluded from your report.

Is blank: This will match assets where the field value has no value and is blank. For example, if you choose the Serial Number field, then your report would include all assets that have no serial number.

Is not blank: This will match assets where the field value has a value. For example, if you were to choose the Serial Number field, then your report would include all assets that have a serial number, but exclude assets that do not have a serial number.

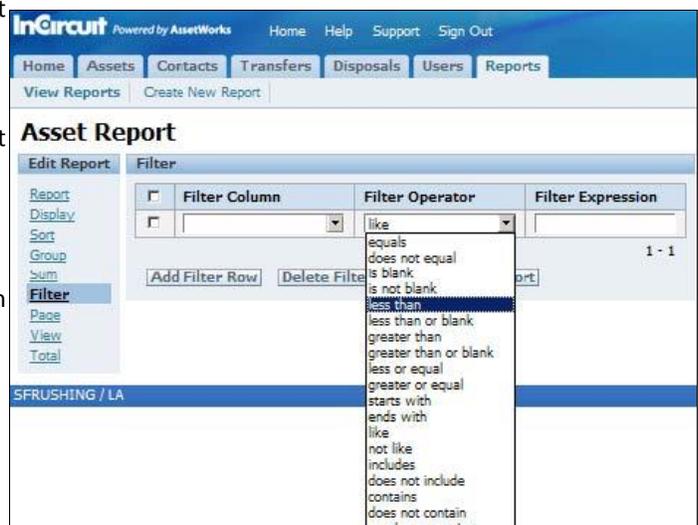
Less Than, Greater Than, less or equal, greater or equal: These operators are used for comparing numeric values. For example, if you want to include only assets that have an Acquisition Cost of \$5,000 or more, then you would choose "Greater Than" and enter 5000.00 under the filter expression.

Starts with / Ends with: These operators allow you to match based on the beginning value of a field. For example, if you want to include assets whose description begins with "computer", you would select Description under the Filter Column, choose "starts with" under the Filter Operator, and enter "computer" in the Filter Expression.

Like / not like: These operators allow you to perform more advanced searching for partial matches. A percent sign is used as a wildcard value and an underscore is used as a single character wildcard value. For example, suppose you wanted to find all assets that contain the word "computer" followed by "laptop" in their description. In this case, you would specify a filter expression of: computer%laptop.

Includes / does not include: These operators allow you to specify a list of values to match. Separate the matching values with commas, and if the field value matches any of the values in your comma-separated list, then the asset will be included on the report. For example, if you want to include all assets that are in either Department A, J, or Z, you would specify the following filter expression: A,J,Z.

Contains / does not contain: These operators allow you to include assets based on partial matching of field values. For example, if you want to include all assets that contain the word "computer" in the description, you would choose a Filter Column of Description and specify a Filter Operator of Contains, and Filter Expression of computer. This option is helpful when searching for items assigned to a specific person, but you aren't sure how the name is under Person Responsible.



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Filter Expression

Filter Expression is the specific criteria for the filter. The entry has to relate to the filter column, for example, if the filter column is "location" and the filter operator is equals, then the filter expression has to be one of your locations for the report to run successfully.

Standard Filter Rows

We suggest all reports start with these two standard rows.

These two criteria create a report showing the all assets the agency has to account for in its inventory.

The screenshot shows the 'Filter' section of the 'Edit Report' interface. It features a table with three columns: 'Filter Column', 'Filter Operator', and 'Filter Expression'. Each row has a checkbox in the first column. The first row has 'Status' in the 'Filter Column', 'does not equal' in the 'Filter Operator', and 'inactive' in the 'Filter Expression'. The second row has 'Agency Number' in the 'Filter Column', 'equals' in the 'Filter Operator', and 'your agency" number' in the 'Filter Expression'. Below the table are three buttons: 'Add Filter Row', 'Delete Filter Row(s)', and 'Run Report'. The page number '1 - 2' is visible in the bottom right corner of the table area.

<input type="checkbox"/>	Filter Column	Filter Operator	Filter Expression
<input type="checkbox"/>	Status	does not equal	inactive
<input type="checkbox"/>	Agency Number	equals	your agency" number

1 - 2

[Add Filter Row](#) [Delete Filter Row\(s\)](#) [Run Report](#)

Remember, Filter Column and Filter Operator are drop down menus. You have to input a good value in Filter Expression to have the report run correctly

Edit Report

There are nine sections under Edit Report.

Display

This section allows you to choose which fields you want to display on the report. The box on the right lists all of the fields included on the report. The order in which they are listed is the order in which they will appear on the report. You can adjust the order of the fields by highlighting a field and clicking the up or down arrow to the right of the box to move the field up or down. The box on the left displays additional fields not currently included on the report. You can move fields between the "included" and "not included" boxes by double-clicking on the field (or by highlighting a field and clicking the left or right arrows displayed between the two boxes).

The list of available fields is the same as the Filter Column, which includes all the asset, equipment, and vehicle records.

Page

This section allows you to specify how many records you want to display at a time in the results grid. For example, if you enter 15, then the results grid will only show the first 15 matching records of your report. However, you can view the additional records by clicking the Next link under the grid, which will then display the next 15 matching records.

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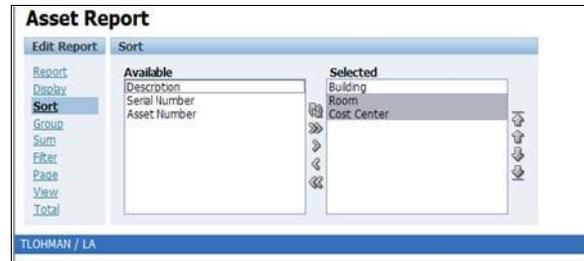
Sort

This section allows you to specify how you want the report to be sorted. The box on the right lists the fields on which the report will be sorted. The order in which the report is sorted is based on the order in which they appear in the box. For example, if

Building appears first, followed by Room, then

the report will sort by Building then by Room. You can adjust

the order of the fields by highlighting a field and clicking the up or down arrow to the right of the box to move the field up or down. The box on the left displays additional fields not currently included in the sort order. You can move fields between the "included" and "not included" boxes by double-clicking on the field (or by highlighting a field and clicking the left or right arrows displayed between the two boxes). The boxes will only contain the fields you chose to display in the Display section above.



Group

This section allows you to specify how you want the report to be grouped. For example, you may want the report divided up based on the building to which assets belong. In this case, you would group on the Building field. The report would then display each building, followed by the assets contained in each building. The box on the right lists the fields on which the report will be grouped. The order in which the report is grouped is based on the order in which they appear in the box. You can adjust the order of the fields by highlighting a field and clicking the up or down arrow to the right of the box to move the field up or down. The box on the left displays additional fields not currently included in the grouping. You can move fields between the "included" and "not included" boxes by double-clicking on the field (or by highlighting a field and clicking the left or right arrows displayed between the two boxes). The boxes will only contain the fields you chose to display in the Display section above.

Sum

This section allows you to choose which fields you want to sum (total). Fields listed in the box on the right will be summed; fields listed in the box on the left will not be summed. The boxes will only contain the fields you chose to display in the Display section above and that are numeric.

Filter

This section allows you to specify the filter criteria to use for your report. Only records that match the criteria you specify here will be included on the report. The filter criteria grid can contain multiple lines, in which case all filter criteria listed in the grid is applied to the report. To add additional filter criteria, click the "Add Filter Row" button. To remove existing filter criteria, place a checkmark in the box next to it and click the "Delete Filter Row(s)" button. Each filter criteria row contains 3 columns:

Filter Column - Choose the column on which the filter will be applied. **Filter Operator** - Choose the type of filter operation (see Filter Operators below) **Filter Expression** - Enter the specific criteria for the filter.

Report

This section allows you to assign a name to your report and save it. You can specify a Report Name and a Report Description. The Report Orientation determines if the report will print out in Portrait (vertically) or Landscape (horizontally). You can also choose to make each group begin on a new page by choosing Yes in the Break on Groups field (if you're using the Groups feature listed above). To save all changes you've made to the report, click the Save button. To completely delete the report so it no longer appears in the list of reports, click the Delete button. To create a new report based on this report, click the Copy Report button.

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With searches unlimited, for the purpose of this guide, here is a listing of the most popular searches.

Searching for computers over \$2,000.

Filter			
<input type="checkbox"/>	Filter Column	Filter Operator	Filter Expression
<input type="checkbox"/>	Description	contains	computer
<input type="checkbox"/>	Accounting Cost	greater than	2000

Searching laptops unlocated in 2009.

Filter			
<input type="checkbox"/>	Filter Column	Filter Operator	Filter Expression
<input type="checkbox"/>	Description	contains	laptop
<input type="checkbox"/>	Unlocated Year	equals	2009

Searching items in a particular location.

Filter			
<input type="checkbox"/>	Filter Column	Filter Operator	Filter Expression
<input type="checkbox"/>	Asset Number	is not blank	
<input type="checkbox"/>	Location	contains	0C245
<input type="checkbox"/>	Building	equals	CLAIBORNE

Searching equipment currently in transfer.

Filter			
<input type="checkbox"/>	Filter Column	Filter Operator	Filter Expression
<input type="checkbox"/>	Asset Type	equals	EQUIPMENT
<input type="checkbox"/>	Status	equals	IN TRANSFER

Searching items scrapped on transfer 14256.

Filter			
<input type="checkbox"/>	Filter Column	Filter Operator	Filter Expression
<input type="checkbox"/>	Status	equals	inactive
<input type="checkbox"/>	Disposition Method	contains	scrap
<input type="checkbox"/>	Disposition Remarks	includes	14256

Searching computers from a specific manufacturer.

Filter			
<input type="checkbox"/>	Filter Column	Filter Operator	Filter Expression
<input type="checkbox"/>	Make	like	dell
<input type="checkbox"/>	Class Code	equals	computer

Searching a partial VIN number (4596).

Filter			
<input type="checkbox"/>	Filter Column	Filter Operator	Filter Expression
<input type="checkbox"/>	Asset Type	equals	vehicle
<input type="checkbox"/>	Serial Number	ends with	4596

Searching person responsible for laptops in a location.

Filter			
<input type="checkbox"/>	Filter Column	Filter Operator	Filter Expression
<input type="checkbox"/>	Description	includes	laptop
<input type="checkbox"/>	Person Responsible	is not blank	
<input type="checkbox"/>	Location	contains	clerical

Searching a Ford vehicle license plate.

Filter			
<input type="checkbox"/>	Filter Column	Filter Operator	Filter Expression
<input type="checkbox"/>	Make	contains	FORD
<input type="checkbox"/>	Asset Type	equals	vehicle
<input type="checkbox"/>	License Plate	does not include	temp

Searching equipment for federal funding over 25%.

Filter			
<input type="checkbox"/>	Filter Column	Filter Operator	Filter Expression
<input type="checkbox"/>	Fund	equals	federal
<input type="checkbox"/>	Percent	greater than	25
<input type="checkbox"/>	Asset Type	contains	equipment

To really get used to the searches, pick one item out of your inventory and drill down a search for it with as many fields as you can. Here is an example of one:

Keep in mind, if you can search it you can run a report on it.

Filter			
<input type="checkbox"/>	Filter Column	Filter Operator	Filter Expression
<input type="checkbox"/>	Description	contains	computer
<input type="checkbox"/>	Make	equals	dell
<input type="checkbox"/>	Serial Number	is not blank	
<input type="checkbox"/>	Accounting Cost	greater than	999.99
<input type="checkbox"/>	Acquisition Date	ends with	2010
<input type="checkbox"/>	Person Responsible	like	Rebecca