

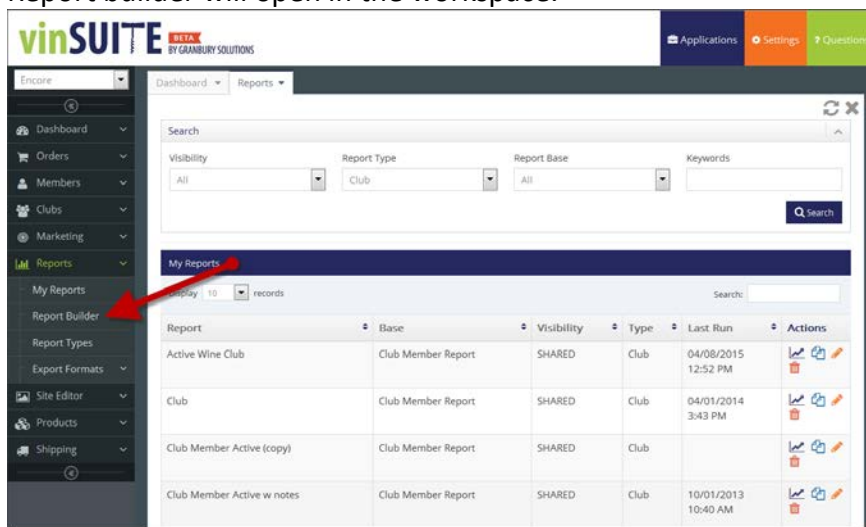
Report Builder: Adding a New Report

What is the Report Builder?

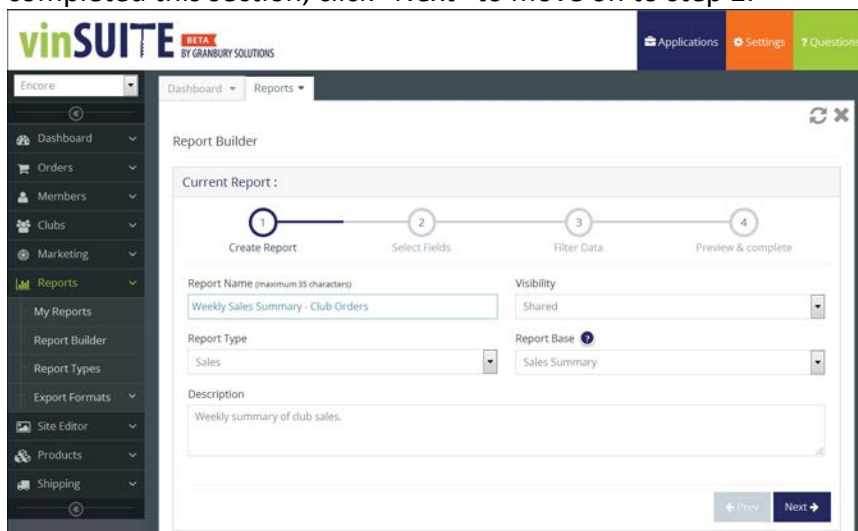
Use the Report Builder to create your own customized reports. Add and arrange the fields any way you would like to include in your report and filter your results any way you would like. In addition to creating new reports, the Report Builder is also used when you choose to edit any of your existing reports.

Adding a New Report

1. In vinSUITE, go to the 'Reports' section of the left hand navigation then choose 'Report Builder'. The Report builder will open in the workspace.



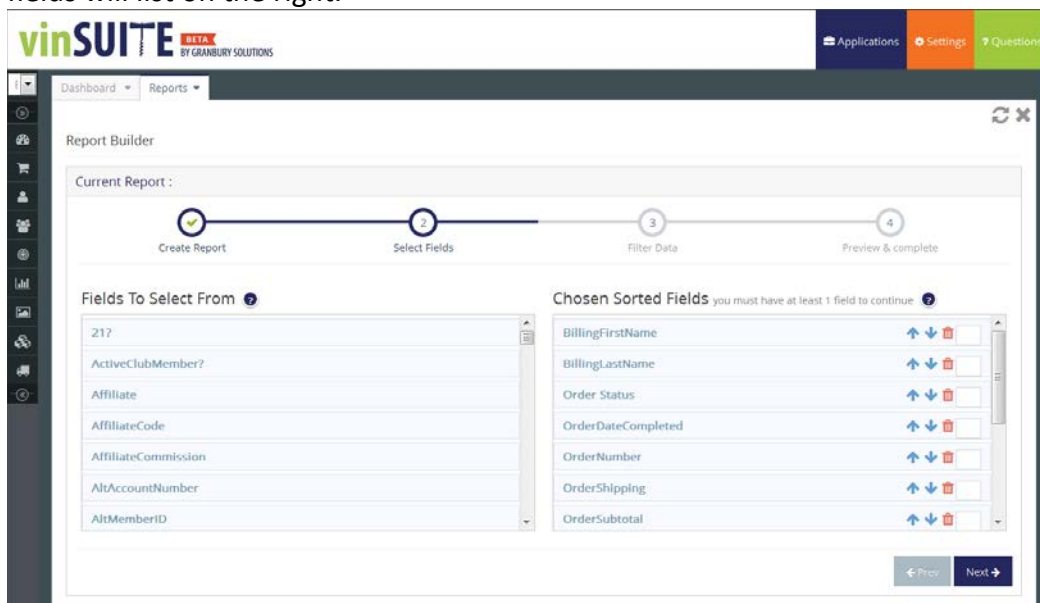
2. Start in the first step of the Report Builder, fill in the fields to create your report. Once you have completed this section, click "Next" to move on to step 2.



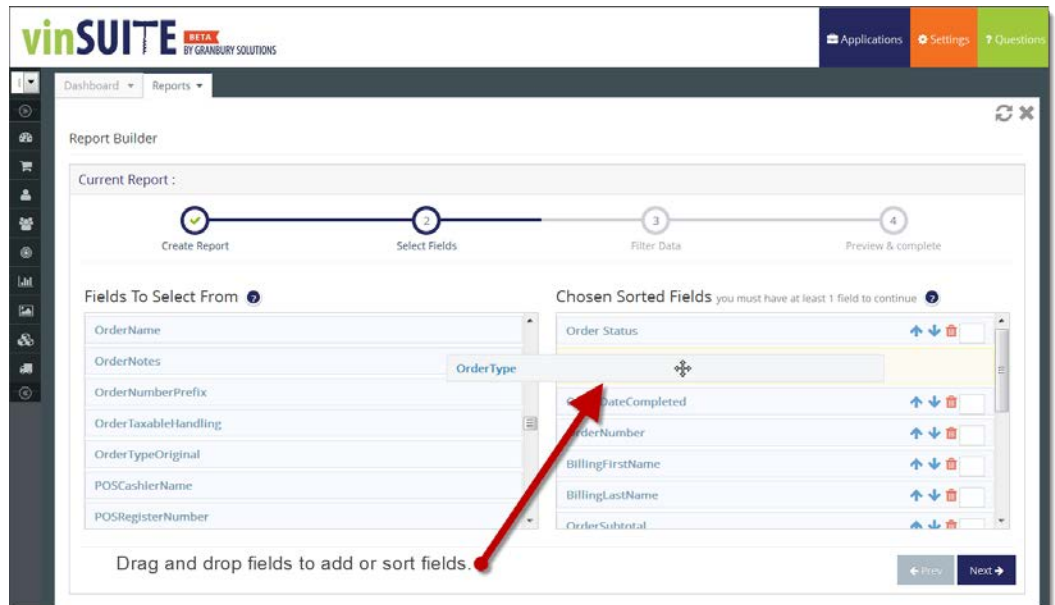
Report Name: Give your report a name, this can be anything you want.

- **Visibility:** This setting defines whether your report can be seen either only by you (private) or by anyone who has access to your admin panel (shared).
 - **Report Type:** Assign your Report Type here. Report types are winery defined you may must have the Report Types table filled out to have anything show in this drop down.
 - **Report Base:** Choose a base for the report you are writing. The report base defines the base structure for your report and defines the fields available. [see also, Report Base Definitions](#)
 - **Description:** Make any notes you would like about your report here. If the report is shared, these notes may help other users know what this report should be used for.
3. In the second step of the Report Builder you will define the fields you want to include in your report. This step will display the fields available for your report. Which fields are made available will vary depending on which base report you choose in step 1. For a full description of the fields in each base report please refer to the eWinery Data Dictionary.

Available fields (not yet included in your report) for the report will show in a list on the left. Selected fields will list on the right.



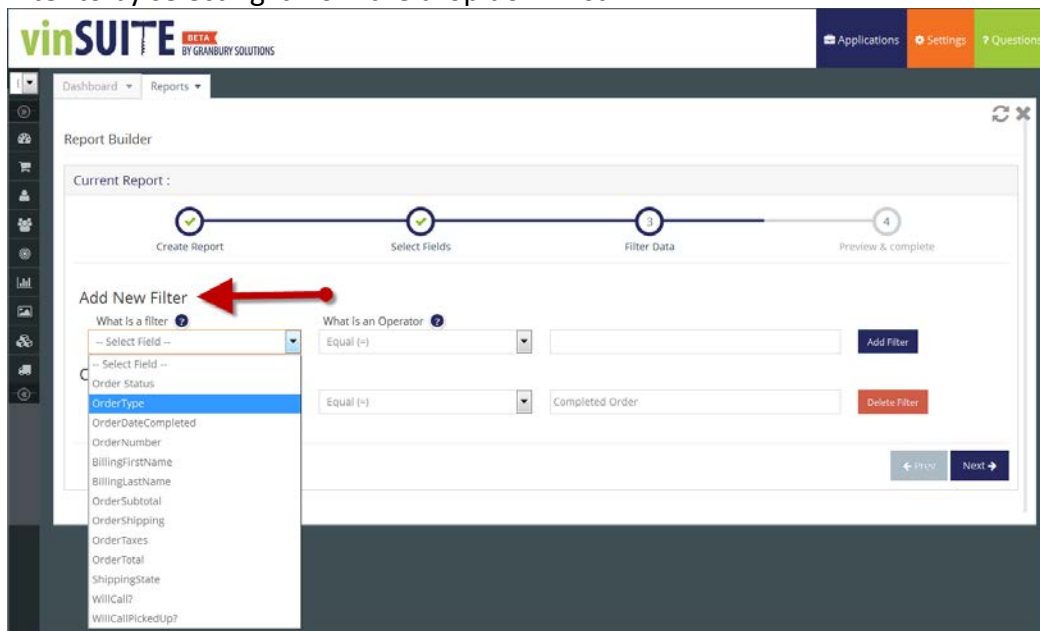
You may organize the fields on your report by dragging and dropping fields from side to side to add or subtract fields or up and down to rearrange the order of selected fields.



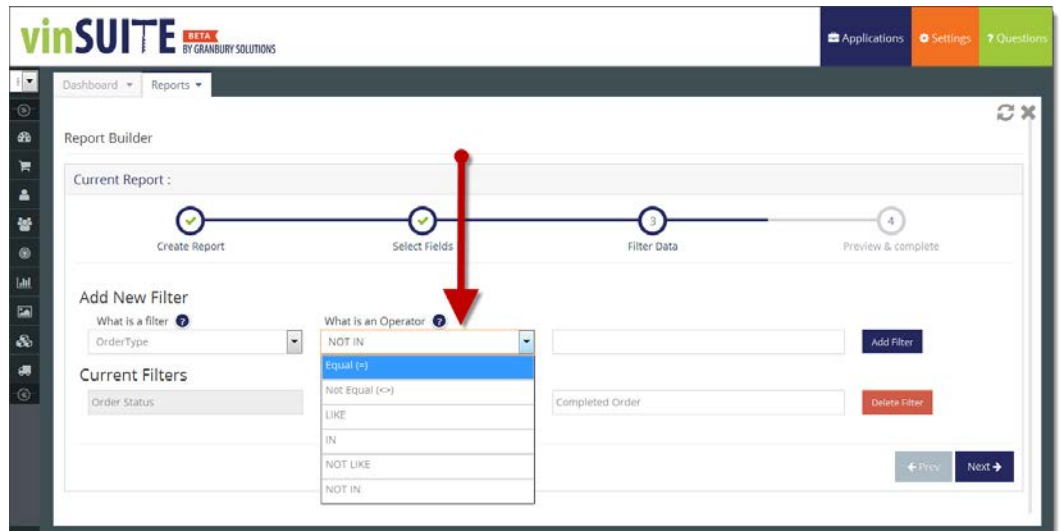
When you are done adding and rearranging your selected fields, click 'Next' to go to Step 3.

- In Step 3, you will apply any filters you need to your report. Filters can be applied to any field that you have included in your report, the type of filter you can apply will vary depending on the type of data you are trying to filter. Learn more about the different kinds of filters in this article about [Filter Operators](#).

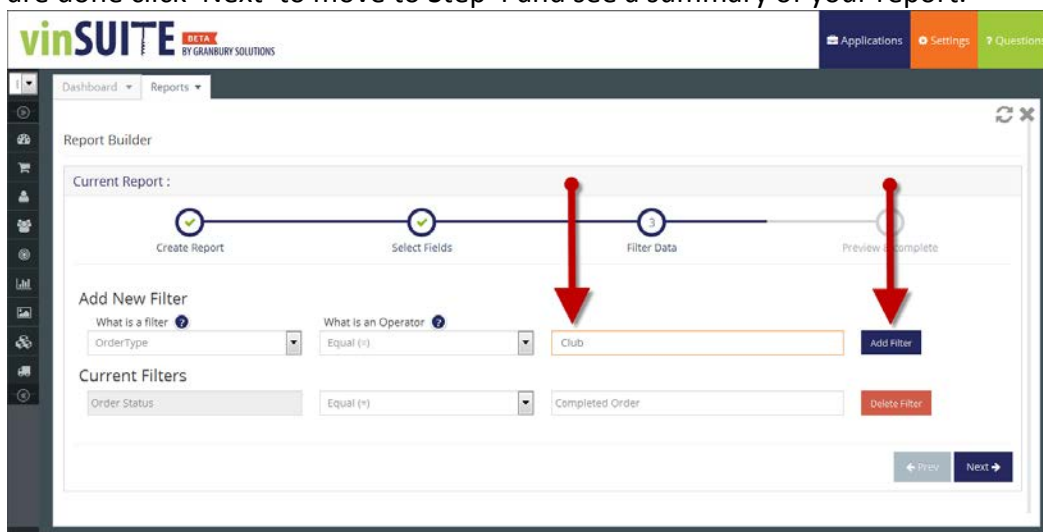
To add your filter in the 'Add New Filter' section, first choose the field that you would like to apply a filter to by selecting it from the drop down list.



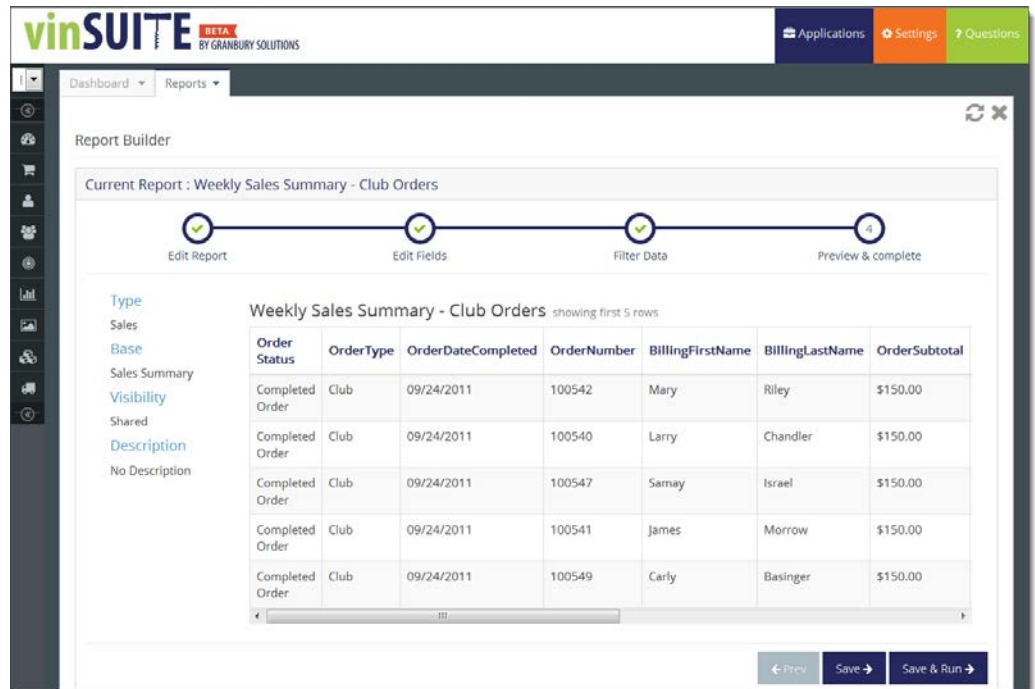
Next choose an operator for your filter



Enter the filter criteria in the box on the far right. Click 'Add Filter' when you are done, this will add your new filter to the list of "Current Filters". You may add as many filters as you would like, when you are done click 'Next' to move to Step 4 and see a summary of your report.



- Step 4 will allow you to see a preview of your report and will give you some different options for saving and running your report. This screen will also feature a summary of your report that includes the first 5 lines of the report.



- o Click 'Save' to save a copy of this report to the 'My Reports' section.
- o Clicking 'Save & Run' will export a current version of this report to Excel for you as well as save a copy of the report to your 'My Reports' section.

When this action is complete it will be confirmed in a green bar across the top of the page and your report will open in Excel. *(How the report opens will depend on your browser settings.)*

