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# DataCollection Grid Reports

Megan De Freitas - 2025-06-11 - Setup

# Overview

Grid Reports are powerful reporting tools that can be set up to display a wide range of information. Their primary purpose is to provide a mechanism to create and run simple reports based on SQL queries and user input.

Note: Grid Reports are only available in Advanced Console and Warehouse Management.

## Security

To enable Grid Reports in DataCollection, go to the Security Editor (Modules > System > Security Editor) and filter to *Grid Reports*. Make sure *Grid Reports* module is checked for the desired user group and save your changes. Log off and log back in for changes to take effect.

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convergence		Admin	Admin	V	GridReports*
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				× 🗸 S	Starts with ([Plugin Name], 'grid reports') 💌 Edit Filter
User Name convergence		ence			
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Reset Password Next Login					
Security Group	Admin	*			

## Usage

To activate Grid Reports, use the following steps:

- 1. Go to the Modules folder.
- 2. Scroll down to Reports.
- 3. Click Grid Reports.

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#### Grid Reports Screen

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Grid Report	Sales	Misc				
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**Reports Panel** 

-	port Type	Report Name	Category
	Category: Grid R	eports	
	Grid Report	Item Pricing	Grid Reports
/	Category: Misc		
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	Grid Report	Sales	Misc

**Expand All**: Expands report categories.

**Collapse All**: Collapses report categories.

Report Name - Column header that displays the given name of the reports.

Report Type - Column header that displays the type of report, such as grid or printed report.

Selected Report		
🛐 Refresh 🛛 🥖 Design 🛛 📝 Edit	t DataSet 🛛 🙀 Reset Layout 👋 Import 🛛 🕱 B	Export 🛯 🗃 Print 🔲 Autorun Report
Item_Number UofM_Schedule		
ITEMNMBR	ITMSHNAM	ITEMDESC
100XLG	Phone	Green Phone
128 SDRAM	RAM	128 meg SDRAM
24X IDE	CD ROM	24x CD-ROM
256 SDRAM	RAM	256 meg SDRAM
32 SDRAM	RAM	32 meg SDRAM
32X IDE	CD ROM	32x CD-ROM
333PROC	Processor	333 Processor
4.5HD	Drive	4.5 gig Hard Drive
400PROC	Processor	400 Processor
40X IDE	CD ROM	40x CD-ROM
450PROC	Processor	450 Processor
500PROC	Processor	500 Processor
6.5HD	Drive	6.5 gig Hard Drive
64 SDRAM	RAM	64 meg SDRAM
8.4HD	Drive	8.4 gig Hard Drive
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### Selected Report Panel

# Actions Toolbar

**Refresh** - Runs the grid report and updates any changes made to the report.

**Reset Layout** - Resets any layout changes made to the report to the default setting.

**Import** - Allows users to import an existing \*.xml or \*.sprept file to create a new report.

**Export** - Exports the report data into an Excel file.

**Print** - Opens a Print Preview window allowing users to print grid report data.

**Autorun Report** - Determines if the report will automatically update data when it is selected from the Reports Panel.

**Note:** Design and Edit DataSet functions are only available in Report Manager.

## Grid Reports Reference Guide

For a complete list of available XML attributes and tags, please refer to <u>Quick Reports</u> <u>Reference Guide</u>.