Fine Tuning GL Query Builder Reports

Fine Tuning Reports

If the data returned is not exactly what was expected, additional fields may be added or removed, additional filters and groups may be created until the report returns the desired results. Each time a change is made to the report the User may click the Refresh Results to view the report query results.

Once a report is completed and the User is satisfied with the report query design, it may be saved for future use if needed. Report query designs may be saved to a local hard drive or in a public folder on a file server. If other Users will be allowed to generate the report whenever needed, it will typically be saved on a file server in a folder to which the intended Users have access. Just keep in mind if another User is granted access to generate a report they are also able to modify the report query design. If the report query design needs to be preserved, a second Master copy of the report query should be saved in a secure location.

Advanced GL Query Builder Features

The information contained in the section Designing a Report Query describes the basic functionality of the GL Query Builder. There are advanced features available which allow a User to create more complex queries using the Filters and Sort functions. Internet based classes are available for SedonaOffice Users desiring training using these advanced features. Please contact the BoldGroup sales office for more information.