

Glossary of terms for Reporting Tools

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Approach:

Metadata layer available/required

Does the end user creating a report connect directly to a database connection or do they connect to a set of fields that are preassembled by someone else.

GUI for end users or programmers

Is the primary interface designed for application developers or for end users.

Banded or page based

If the primary structure of the design area is made up of recurring bands that allow free form placement then the tool is 'banded'. If the design area is a free form page which can contain a table object for recurring sections then it is 'page based'. Although table objects can contain bands, table objects do not typically allow free form placement within those bands (Crystal is banded, SSRS is page based).

Has table object

Is there a table object available.

Format of template file

If the report settings are stored in an open format (such as XML) then the format is listed here. If the settings are not in an open format or are stored in a binary format, then the format is listed as proprietary. The main point being is this an open format or a proprietary binary format.

Template file extension

Report settings are stored in a file by the application. What is the file extension used by the application when saving this file (Crystal is RPT).

Design Interface:

Exposes all tables/fields for exploration

A user does not have to start with a SQL Query to generate a data set. They can select from a list of tables in the database connection and then can select any fields from those tables to be part of their data set. The point being that the tool allows the user to connect to unfamiliar data and explore the tables and fields. This does not apply to tools that require a metadata layer.

Join types available in GUI

Only applies when a user can join tables using a graphic interface (as opposed to writing SQL) and can determine what fields are used to make the join, the direction of the join and the type of join. If this is available in the GUI, what join types are available.

Join types allowed across connections

If you can join tables in the GUI, and the joined tables can come from different data connections, what join types are allowed.

User written SQL allowed

The user is allowed to generate a data set by writing their own SQL.

Preview layout changes without a requery

Can you make a layout change (move a field, resize a field, etc) and see the result in preview without the tool having to send a new query to the database.

Can make layout changes in preview

Objects can be added, deleted, moved, sized and formatted without leaving preview mode.

Open/Modify template w/o connection

You can open a report template and change settings without the database connection being available.

Save snapshots of data, work with it later

A saved report can include a snapshot of data from a specific time. This report can be modified the next day and the changes can be previewed using the previous days saved data (off line). The modified report retains the ability to connect to live data whenever it is available.

Runtime Interface:

Runtime parameters for user input

Can prompt the user for input that can be used for filtering, formatting or for calculations.

Parameters that allows multiple selections

Parameter input box can be set to allow the users to select more than one value at a time.

Runtime query for parameter values

The list of parameter values can be drawn from the database at runtime.

Drill-down from summary to details

User can select a single group of the report and expose the details of that group. There are two possible styles:

Same Tab - the group will expand / collapse within the main report preview

New Tab - the details are shown on a separate tab

Can follow a hyperlink from preview

Hyperlinks in the report can be clicked to open URLs, documents, etc.

Export to PDF/XLS/TXT/CSV

Exports to standard document formats.

Objects:**Charts (pie/bar/line)**

Supports standard chart types

Report level cross-tabs

Supports cross-tab objects

Group specific cross-tabs

Can generate a separate cross-tab for the data in each group without having to query the database separately for the data.

Subreports

Allows the insertion of one report into another

Subreports within subreports

Allows a subreport to contain it's own subreports.

Bar codes

Has a built-in barcode support for traditional linear codes

2D bar codes

Has a built-in support for the newer 2D barcodes

Integrate PDFs into report

Supports the incorporation of PDF objects into the report.

Automatic table of contents

Allows you to define the heirarchy for a TOC that can be generated automatically when the report is run.

Automatic index

Allows you to define the heirarchy for an index that can be generated automatically when the report is run.

Mailing label wizard

Has automatic wizard/templates for common mailing label sizes

Subtotals:**Can group/subtotal while keeping details**

You can show details and subtotals together, unlike a s SQL query "Group By" which eliminates the details.

Filter groups based on subtotals

Use any subtotal as a filter to eliminate groups from the report

Can rank groups based on a subtotal

Use any subtotal as a ranking value to put the groups in asc/desc order

Can show TopN groups with others

Use any subtotal to select the top N groups, lumping the rest as "Others"

Running total fields

Totals that change on each detail record.

Preprocessed totals

Totals that can show the same value in the header, on the details and in the footer.

Expressions:**Can create calculated expressions**

User can create calculated columns

Can group/summarize on expressions

Calculated columns can be used as group fields and can be totalled.

Use a named expression within another

One calculated column can be referenced within another calculation by name.

Compare values to next/previous row

Calculations can compare one detail row value in the report to the value in the next or the previous record

Supports FOR and WHILE loops

Expression language allows looping logic (Do while, for loops, etc)

Subreport values in main report calculations

Provides a method for using a subreport value in a calculation in the main report.

Format:**Text Objects can wrap to additional lines**

Text objects that vary in length can be set to automatically wrap to additional lines when they have too much text for the existing object size.

Can interpret text stored in HTML/RTF

Text objects can be set to interpret HTML and RTF formatting codes that are embedded in the text, rather than printing the codes themselves.

Keep Together for individual objects

An object that can grow can be set to split or not split across pages.

Keep Together for sections/bands

Sections can be set to split or not split across pages.

Keep Together for groups

Groups can be set to split or not split across pages.

Keep Group Header/Footer with 1 detail

Group header can be set to print on the next page, unless there is room for at least one detail that will fit on that page.

3 object colors (font/background/border)

Every character based object has 3 formatting color properties

Page breaks based on detail data

Page breaks can be set to occur based on detail row values and calculations

Section colors based on detail data

Section colors can be set to occur based on detail row values and calculations

Page N of M

Report has the ability to print the total page count on the first page.

Suppress bands based on expressions

Sections can be visible or invisible based on detail row values and calculations

Formatting properties tied to expressions

Formatting properties can occur based on detail row values and calculations

Object size/position tied to expressions

Objects can be moved vertically or horizontally based on detail row values and calculations

Evenly space object groups automatically

A group of objects can be selected and the space between them (vertical or horizontal) can be made uniform.

Images read from calculated path

An image object on the report can be updated from outside of the report based on a calculated path or URL.

Text can flow around image/table objects

Text objects that can grow can be arranged around a fixed object like an image or table, so that the text will automatically flow around the object.

Multiple columns (across and/or down)

Supports multiple column layouts which can be either newspaper style (down then across) or label style (across then down), or both.

Can split sections into subsections

A single section can be split into subsections. While the sections both occur at the same frequency, they have individual formatting properties.

Can superimpose sections (Underlay)

A section can be set to superimpose over following sections.

Deployment:**3rd-party products available**

The number of products and add-ons available that are specifically designed to work with this tool. (viewers, schedulers, utilities, etc).

Crystal Reports conversion available

Is there a tool to convert a Crystal RPT file into this format either provided by the vendor, or from a third party.