



Release notes

Micad Reports

16/10/2024

Document Version 1.3



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Introduction to Micad Reports

This guide is specific to Micad Reports and provides an overview of its key features. As the application evolves, this document will be updated accordingly. Details on new features and fixes will be listed in the final pages with each subsequent release.

What are Micad Reports

Reports serves as a central platform for accessing data from Micad Applications and professional modules. It provides a single point of access via the Micad HUB, allowing users to collaborate and share information with partners and service providers in a read-only format. Reports and data are accessible from both desktop PCs and mobile devices.

Reports can be run on demand or scheduled to run automatically. Users can easily select their topic from the left-hand menu or by using the keyword search feature. They can choose from a variety of pre-existing reports or create custom reports using the 'Create with Designer' option.

The 'Designer' tool, available as an additional feature with an extra purchase, guides users through a step-by-step process to create either private or public reports, depending on their permissions. Only report admin users have the ability to create public custom reports, which are shared with all clients within their organization. Users can save, copy, and share their 'Designer' reports with others. Once a report is saved, it can be run ad hoc or scheduled like any other report.

What's new in Micad Reports

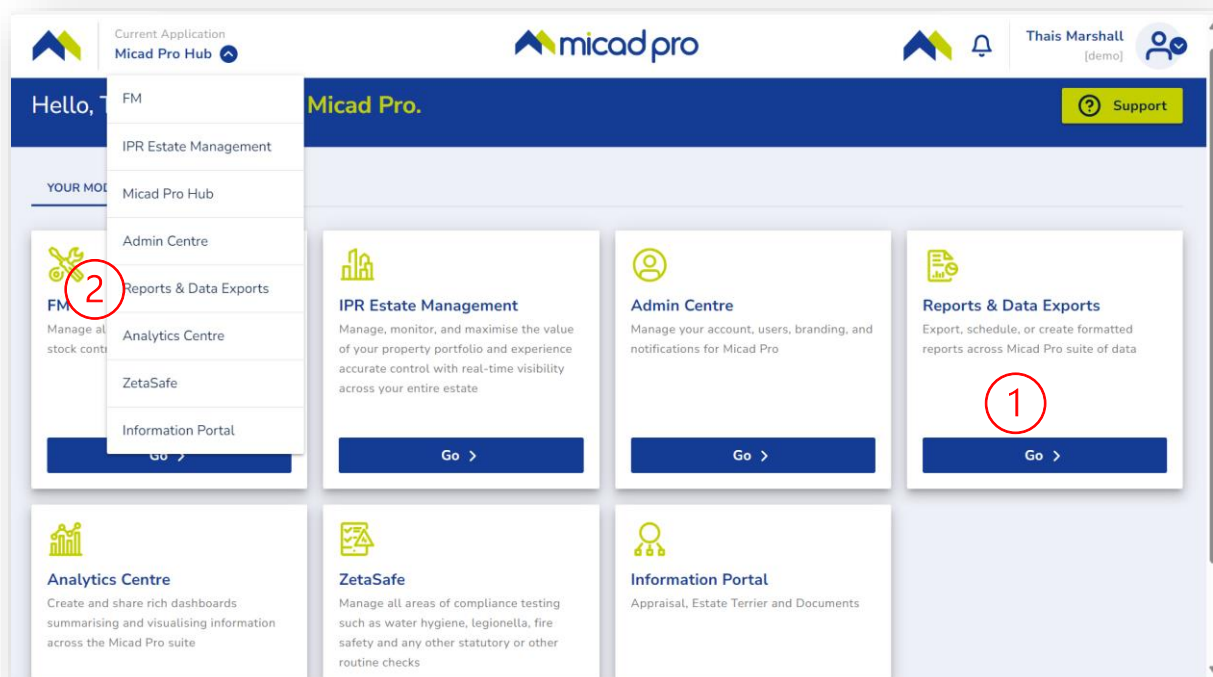
1. New technology many legacy limitations are removed
2. Unified 3rd generation UI
3. Unified centralised security 'Single Micad' login and SSO
4. The data displayed is live immediately
5. System load impact is moved away from the application module
6. Scheduler wizard
7. Mobile support with responsive design
8. Multi tenancy architecture
9. New flexible URL structures facilitate sharing and integration with third parties
10. Superior and more durable backend infrastructure
11. Ability for the user to create custom reports with **Designer**

Micad Reports

Accessing the Micad Reports service

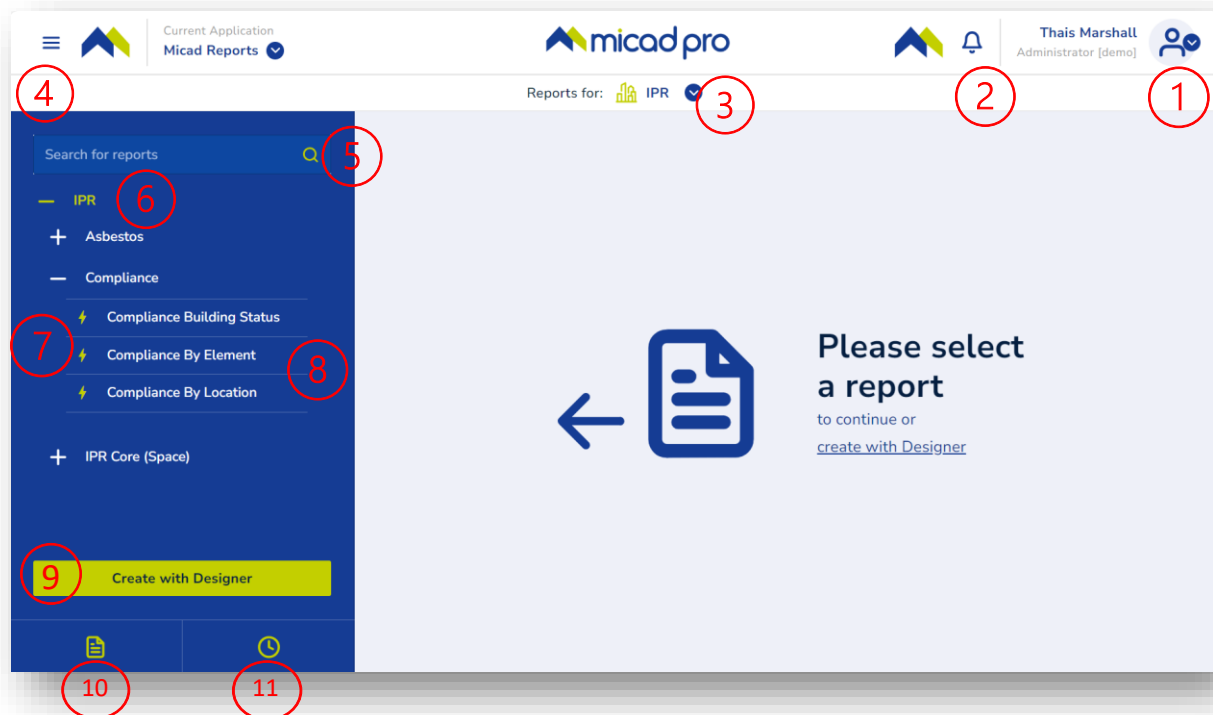
Access through Micad HUB by:

1. Selecting Reports & Data Exports tile,
2. or changing the current application to 'Reports & Data Exports'



Reports service homepage

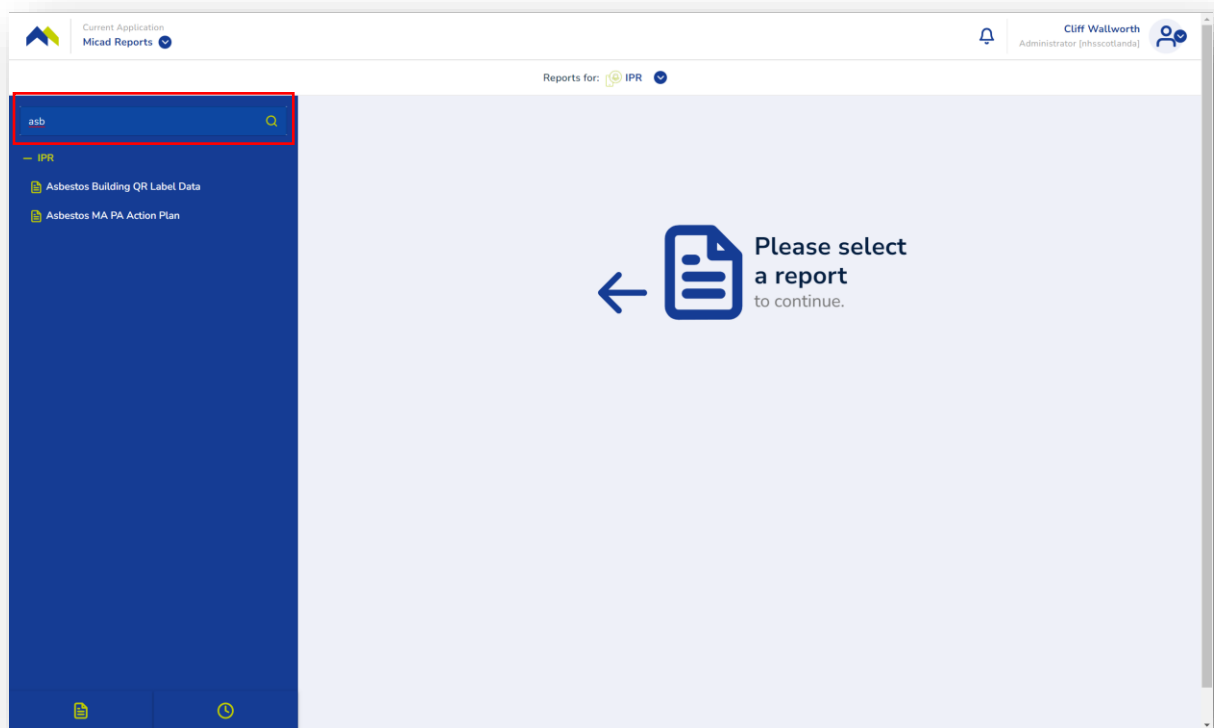
Once you enter the Reports service the homepage layout will appear.



1. Current user account login, access to user details and to 'About' page with release date and product version.
2. Reports notification feature.
3. Application selector.
4. Show/hide left-hand side menu.
5. Report search feature.
6. Tree view control (*showing – represents expanded, + represents collapsed*).
7. Reports icons (*lighting bolt represents pre-existing report, star represents custom reports created with 'Designer'*)
8. Reports list.
9. Access to 'Designer' feature.
10. Reports Activity, shows all reports (in your current user profile) already delivered.
11. Report Schedules, shows all reports (in your current user profile) already configured.

Search for a report

Use the search feature to track a keyword related to your report subject.



Click in the "Search for reports" text box and begin typing your keyword. As you type, the list will filter to display reports that match your search criteria. If no matches are found, the pane will appear blank.

Run a report ad hoc

Once the reports is visible in the left menu, you can request it to be run ah-hoc

The screenshot displays the Micad Reports application interface. On the left, a blue sidebar menu shows the 'asb' section with two items: 'Asbestos Building QR Label Data' and 'Asbestos MA PA Action Plan'. The main panel is titled 'Asbestos MA PA Action Plan' and 'Micad Asbestos Register Building Level Report'. It features a 'GENERATE' tab and a 'SELECT PARAMETERS' section with a 'GENERAL' sub-tab. The 'SELECT PARAMETERS' section includes dropdown menus for 'Region' (set to 'Queen Margaret Locality, QMH') and 'Site' (set to 'que', with 'Queen Margaret Hospital, F805H' visible below). A 'Generate Report' section on the right contains a 'Report Name' field (filled with 'Asbestos MA PA Action Plan'), a 'Format' dropdown (set to 'PDF'), a 'Save Parameters' toggle, and a 'Generate Ad-Hoc Report' button. Below this is a 'Share Report' section with an 'Input email recipients' field and a 'Share Report' button. The top of the interface shows the user 'Cliff Wallworth' and 'Administrator [rhscotlanda]'.

The report generator requires parameters, this asbestos report must be executed from building level

Generate tab

Click on the name of the report you wish to run. The report generator will appear in the central panel, where you can define the parameters for the specific report. Under the General tab, select the desired locations for the report. Each level features a dropdown menu displaying locations from the IPR system. The available selections are determined by the report's specifications.

Note. Report parameters are defined by each report, maybe a location-based report might require to be run at site level. The concept of location-based reports is common throughout the IPR and its professional module. When a report is designed, a description and level narrative will be provided by the developer or party that specified it.

1. The red star (Buildings) indicates this is a mandatory level by design

Each of the levels requires a location selection, working from the top (Region) each level will progressively disclose the property hierarchy.

You can scroll through the lists or if you know the name or code, just type in the text to speed up the selection process.

2. If you make a mistake, you can quickly clear all selections, Click the Clear All icon in the top right of the Generate tab.
3. You can edit the title of the report at this point.
4. Choose the format of your report.
5. You can execute the report with this minimum of information. Click 'Generate Ad Hoc Report' to execute the report.

Save and reuse the report data and format

To get more value form the report, save the parameters, detail it or email it out.

The screenshot displays the 'Asbestos MA PA Action Plan' web interface. The top navigation bar includes 'GENERATE', 'REPORT ACTIVITY', 'SCHEDULES', and 'SAVED PARAMETERS'. The main content area is divided into two panels. The left panel, titled 'Select Parameters', has a 'Clear All' button and a link to 'Import Saved Parameters'. It contains three sections: 'GENERAL', 'Region' (set to 'Queen Margaret Locality, QMH'), 'Site' (set to 'Queen Margaret Hospital, F805H'), and 'Buildings' (set to 'Energy Centre, Workshops, Laundry, Medical Records Storage, AH'). The right panel, titled 'Generate Report', includes a 'Report Name' field (set to 'QMH Energy Centre Asbestos'), a 'Format' dropdown (set to 'PDF'), a 'Save Parameters' toggle (checked), and a 'Name' field (set to 'Block AH Asbestos in PDF'). Below these is a 'Generate Ad-Hoc Report' button. The 'Share Report' section below it has an 'Input email recipients' field and a 'Share Report' button.

Names and parameters are helpful with repeating tasks

In the section Generate Report:

Use **Report Name** so that when the file is created it appears in the Report Activity list and each occurrence can be differentiated for the data it represented.

Name the **Save Parameters** appropriate to the location data the report file will use.

In the section Share Report:

Carefully add each valid emails address in the **Input email recipients** field. Press enter after each one and the system will capture each as you go forming a list. If you make a mistake, click the X to remove it.

The Ad Hoc feature, used to its full potential.

The screenshot displays the Micad Reports web application interface. The top navigation bar includes the Micad logo, 'Current Application Micad Reports', a notification bell, and the user profile 'Cliff Wallworth Administrator [rhscotlanda]'. The main header shows 'Reports for: IPR'. The left sidebar contains a search bar and a list of reports: 'Asbestos Building QR Label Data' and 'Asbestos MA PA Action Plan'. The main content area is titled 'Asbestos MA PA Action Plan' with the subtitle 'Micad Asbestos Register Building Level Report'. Below the title are tabs for 'GENERATE', 'REPORT ACTIVITY', 'SCHEDULES', and 'SAVED PARAMETERS'. The 'GENERATE' tab is active, showing a 'Select Parameters' section with a search bar, a 'Clear All' button, and a list of parameters: 'Region' (Queen Margaret Locality, QMH), 'Site' (Queen Margaret Hospital, FB05H), and 'Buildings' (Energy Centre, Workshops, Laundry, Medical Records Storage, AH). To the right of the parameters is a 'Generate Report' section with a 'Report Name' field (Asbestos report for QMH block AH), a 'Format' dropdown (PDF), a 'Save Parameters' toggle, and a 'Name' field (QMH asbestos reports). Below this is a 'Share Report' section with an 'Input email recipients' field containing two email addresses: 'cliffw@micad.co.uk' and 'amalviswanath@micad.co.uk'. At the bottom of the 'Generate Report' section is a 'Generate Ad-Hoc Report' button, and at the bottom of the 'Share Report' section is a 'Share Report' button.

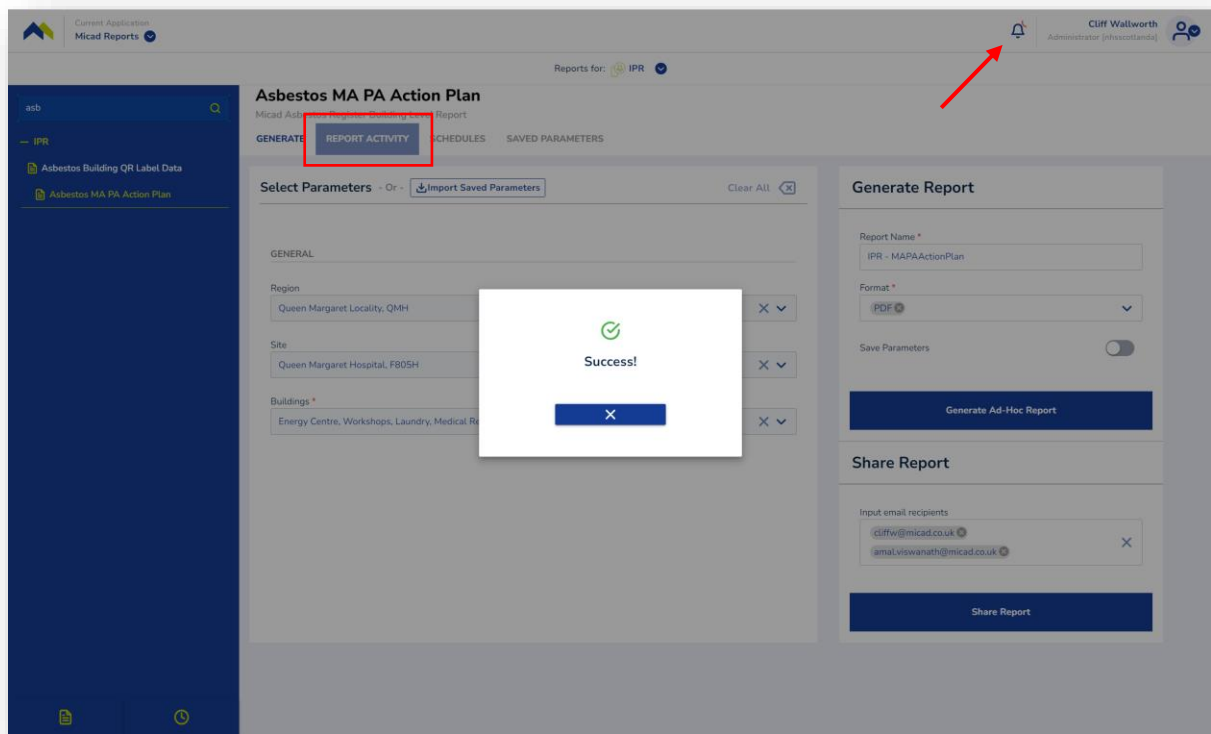
Example shows how the name parameters and email might be used

To execute the report and save it in a specific name and/or save its parameters. Click Generate Ad Hoc Report.

To execute the report and send copies in email to the named recipients, Click Share Report.

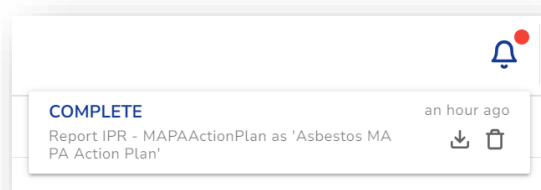
Report delivery

Soon after the report is executed, a confirmation will be visible on the Report Activity tab. If the report was sent by email, it will arrive shortly after.



Observe the Report Activity tab flashing briefly. The notification bell will show a red spinner

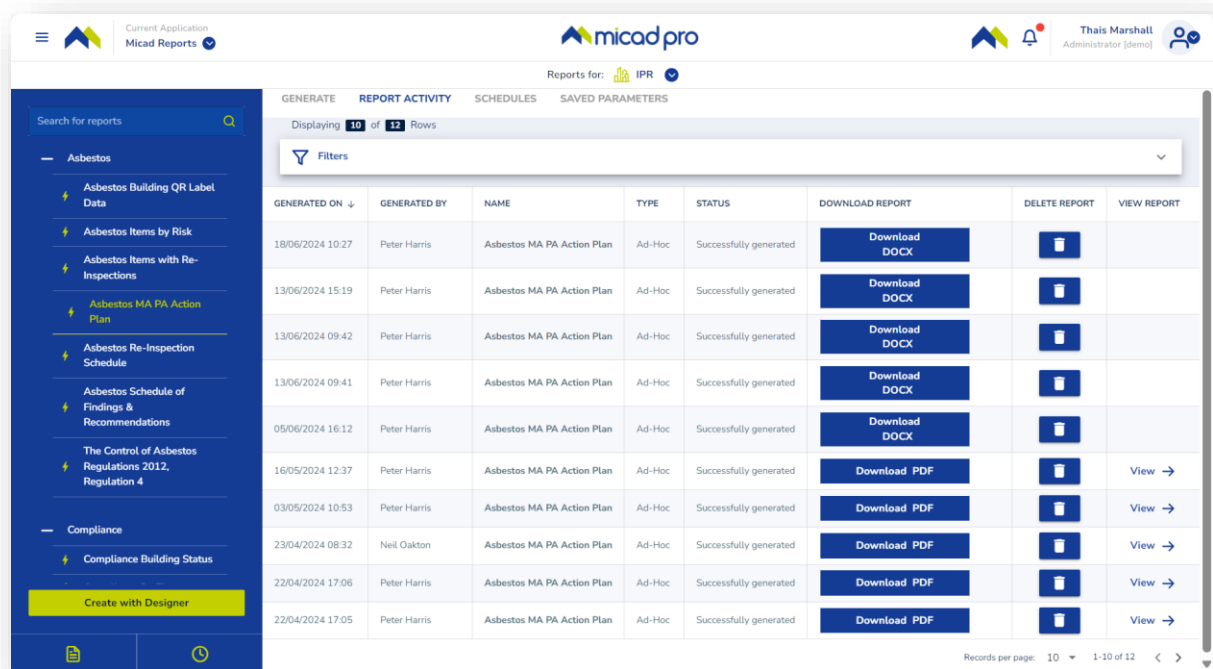
The report is now being generated in the background.



Once you see notification marked with a solid red icon, you can then click to download the report. Use this feature to develop or check your report is correct, this means you do not have to leave the screen where you are setting and naming your parameters. You can delete the report until the correct data is achieved.

Report Activity tab

Use the report activity tab to access all the reports that you have previously executed.



The screenshot shows the 'REPORT ACTIVITY' tab in the Micad Pro interface. The left sidebar contains a search bar and a list of report categories: Asbestos (with sub-items like 'Asbestos Building QR Label Data', 'Asbestos Items by Risk', etc.), Compliance, and a 'Create with Designer' button. The main area displays a table of generated reports. The table has columns for 'GENERATED ON', 'GENERATED BY', 'NAME', 'TYPE', 'STATUS', 'DOWNLOAD REPORT', 'DELETE REPORT', and 'VIEW REPORT'. The 'DOWNLOAD REPORT' column contains buttons for 'Download DOCX' or 'Download PDF'. The 'DELETE REPORT' column contains trash icons. The 'VIEW REPORT' column contains 'View' links for PDF reports. The table shows 10 rows of data, all for 'Asbestos MA PA Action Plan' reports generated by 'Peter Harris' on various dates in 2024. The status for all reports is 'Successfully generated'.

GENERATED ON	GENERATED BY	NAME	TYPE	STATUS	DOWNLOAD REPORT	DELETE REPORT	VIEW REPORT
18/06/2024 10:27	Peter Harris	Asbestos MA PA Action Plan	Ad-Hoc	Successfully generated	Download DOCX		
13/06/2024 15:19	Peter Harris	Asbestos MA PA Action Plan	Ad-Hoc	Successfully generated	Download DOCX		
13/06/2024 09:42	Peter Harris	Asbestos MA PA Action Plan	Ad-Hoc	Successfully generated	Download DOCX		
13/06/2024 09:41	Peter Harris	Asbestos MA PA Action Plan	Ad-Hoc	Successfully generated	Download DOCX		
05/06/2024 16:12	Peter Harris	Asbestos MA PA Action Plan	Ad-Hoc	Successfully generated	Download DOCX		
16/05/2024 12:37	Peter Harris	Asbestos MA PA Action Plan	Ad-Hoc	Successfully generated	Download PDF		View →
03/05/2024 10:53	Peter Harris	Asbestos MA PA Action Plan	Ad-Hoc	Successfully generated	Download PDF		View →
23/04/2024 08:32	Neil Oakton	Asbestos MA PA Action Plan	Ad-Hoc	Successfully generated	Download PDF		View →
22/04/2024 17:06	Peter Harris	Asbestos MA PA Action Plan	Ad-Hoc	Successfully generated	Download PDF		View →
22/04/2024 17:05	Peter Harris	Asbestos MA PA Action Plan	Ad-Hoc	Successfully generated	Download PDF		View →

A history of output files generated by Micad reports

You can navigate through the files, sort the table by columns, and download any historical report. Use the page breaks for easier viewing.

This page displays key information about each report, including the date it was generated, the user who generated it, the report title, type (ad hoc or scheduled), status (Successfully Generated, Queued, or Failed), as well as buttons for downloading, deleting, or viewing PDF reports directly on the page without needing to download them.

To download a report, click the **Download** button, which retrieves the stored version generated on the specified date. This copy reflects the data from the system at that time.

To delete a report, simply click the **Delete** icon to remove the stored copy.

Note: In this example, the selected report is an asbestos report titled *Asbestos MA PA Action Plan*. The Report Activity section only shows the history of running this specific report. To view the history of all reports you've executed, use the icon located at the bottom left of the menu, which will display all previously run reports.

View the report

Use the View button to quickly preview the report output if report was run as pdf. The visual format of the report varies between file technologies.

The screenshot displays the Micad Reports application interface. On the left is a sidebar with a search bar and a list of report categories under 'IPR'. The main area shows a PDF report titled 'Energy Centre, Workshops, Laundry, Medical Records Storage AH'. The report includes a header with 'Generated On' and 'Generated By' information, and buttons for 'Copy URL', 'Send Email', and 'Download PDF'. The report content includes a table with inspection details, a 'Comments' section, and two assessment tables: 'Material Assessment' and 'Priority Assessment'. The 'Material Assessment' table shows a total of 2 for 'D' (Dangerous). The 'Priority Assessment' table shows a total of 3 for 'Sound'. At the bottom, there are tables for 'Actions Arising' and 'Re-Inspection Schedule'.

Inspection Date	Component	Sample No.	Survey Type	Assessor Type	Quantity of Material
8/2/2021	Mastic - Sealant	CB003688	Management	Chrysotile, Chrysotile	11m

Material	1	Extent of Damage	0
Surface Treatment	0	Asbestos Type	1
MATERIAL ASSESSMENT TOTAL		2	D

Main Type of Activity	0	Extent of Material	0
Maintenance Activity	0	Location	2
Accessibility	0	Number of Occupants	1
Frequency of Use	0	Average Time is in Use	0
Frequency of Maintenance Activity	0	Risk Assessment Total	1
PRIORITY ASSESSMENT TOTAL		3	Sound

Actions Arising	Due Date	Estimated Cost
	8/2/2021	

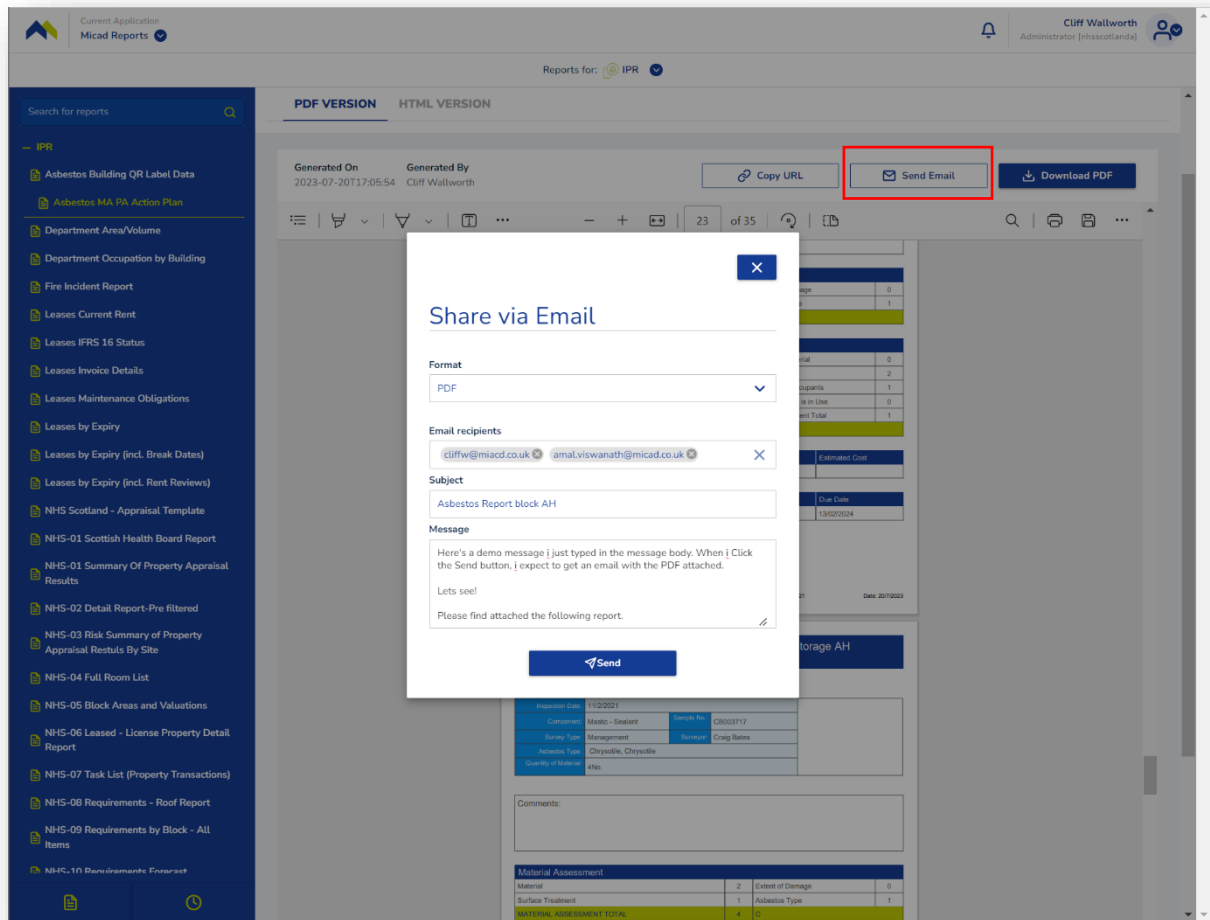
Re-Inspection Schedule	Status	Due Date
	Past The Due Date	08/02/2023

Example show a PDF and uses the embedded web browser's PDF technologies and feature to preview

Use the **Copy URL** button to share a direct link to the report data file (PDF in this example).

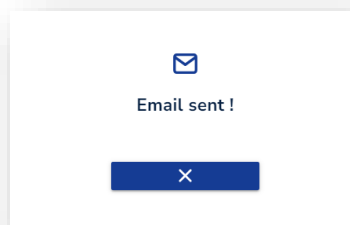
Use the **Download** button to take a copy of the report data file from the system.

Use the **Send Email** button to share a copy of the report data file from the system.



Share the report data file direct from the preview screen

Fill out the **Share via Email** fields, click **Send** when done.



An email will arrive in the inbox of recipients. Look for a sender no-reply@micadnotifications.co.uk

Note. You must make sure that the email address you type is valid. The system assumes that email addresses can be used from any domain, not necessarily valid system users. In the test above, there's a typo in a domain name, only one recipient received the email message. You will not be alerted of non-delivery.

Schedules tab

To add a recurring schedule to an existing report format, in the **Report Activity** tab, Click the **Schedules** tab.

The screenshot shows the 'Asbestos MA PA Action Plan' report in the 'REPORT ACTIVITY' tab. The 'SCHEDULES' tab is highlighted with a red box. The report displays a table of generated reports with columns: GENERATED ON, GENERATED BY, NAME, TYPE, STATUS, DOWNLOAD REPORT, and VIEW REPORT. The table contains 10 rows of data, all showing 'Successfully generated' status. A 'Download PDF' button is available for each row. The 'VIEW REPORT' column contains a 'View' link with a right arrow. The 'GENERATE' tab is also visible, and the 'REPORT ACTIVITY' tab is selected. The 'SCHEDULES' tab is highlighted with a red box.

GENERATED ON	GENERATED BY	NAME	TYPE	STATUS	DOWNLOAD REPORT	VIEW REPORT
20/07/2023 17:05	Cliff Wallworth	IPR - MAPAActionPlan	Ad-Hoc	Successfully generated	Download PDF	View →
20/07/2023 17:05	Cliff Wallworth	Asbestos MA PA Action Plan	Ad-Hoc	Successfully generated	Download PDF	View →
20/07/2023 16:55	Cliff Wallworth	Asbestos report for QMH block AH	Ad-Hoc	Successfully generated	Download PDF	View →
20/07/2023 16:49	Cliff Wallworth	Asbestos MA PA Action Plan	Ad-Hoc	Successfully generated	Download PDF	View →
20/07/2023 16:05	Cliff Wallworth	IPR - MAPAActionPlan	Ad-Hoc	Successfully generated	Download PDF	View →
20/07/2023 16:01	Cliff Wallworth	Asbestos report for QMH block AH	Ad-Hoc	Successfully generated	Download PDF	View →
20/07/2023 14:14	Cliff Wallworth	Asbestos MA PA block AH	Ad-Hoc	Successfully generated	Download PDF	View →
20/07/2023 14:00	Cliff Wallworth	QMH Energy Centre Asbestos	Ad-Hoc	Successfully generated	Download PDF	View →
12/07/2023 14:58	??	MA PA Action Plan	Ad-Hoc	Successfully generated	Download PDF	View →
12/07/2023 08:21	??	MA PA Action Plan	Ad-Hoc	Successfully generated	Download PDF	View →

The screenshot shows the 'Asbestos MA PA Action Plan' report in the 'SCHEDULES' tab. The 'Add Schedule' button is highlighted with a red box. The report displays a table with columns: NEXT RUN, SCHEDULE NAME, OWNER, FREQUENCY, RECIPIENT, and LAST SUCCESSFUL RUN. The table is currently empty, showing 'No data available'.

NEXT RUN	SCHEDULE NAME	OWNER	FREQUENCY	RECIPIENT	LAST SUCCESSFUL RUN
No data available					

Click the Add Schedules button to start the schedule wizard process

Add schedule wizard

Fill out the 3 stages of the wizard.

Add Schedule for: Asbestos MA PA Action Plan

1 Schedule Settings 2 Report Parameters 3 Output Settings

Clear All

Schedule Name*
The name of the schedule

Schedule Description
The description of the schedule

Start Job On*
2023-07-21T15:45:58

Time Zone*
Select an option

Recurrence* ☒ Simple ☐ Advanced

Indefinitely ☒

Frequency*
Repeat at frequency

Frequency Unit*
Repeat every unit

Cancel Next Step

Fill out a **Schedule Name**

Schedule Description is optional but think of using consistent terminology

The specific date and time is need for the schedule, **Start Job On**

A **Time Zone** must be specified

You can choose to express your scheduler setting in **Simple** or by using **Advanced** options.

Schedule settings

Carefully fill out the settings. To exit the wizard click anywhere outside the popover window.

The screenshot shows a web application interface with a sidebar on the left containing a search bar and a list of categories like 'Asbestos', 'Fire Incidents', 'IPR Core (Space)', 'Land and Property Barrier', 'Leases', and 'NHS Scotland'. The main content area displays a wizard titled 'Add Schedule for: Asbestos MA PA Action Plan'. The wizard has three tabs: 'Schedule Settings', 'Report Parameters', and 'Output Settings'. The 'Schedule Settings' tab is selected and contains the following fields:

- Schedule Name***: Asbestos weekly report for Block AH
- Schedule Description**: Asbestos Weekly - Mondays
- Start Job On***: 2023-07-23T16:00:00
- Time Zone***: Greenwich Mean Time
- Recurrence ***: Simple (selected), Advanced
- Days**: Mon
- Month Days**: Select option
- Months**: Select option
- Recur until**: 2024-07-31T16:45:58

At the bottom of the wizard are two buttons: 'Cancel' and 'Next Step'.

Click the **Next Step** button to continue.

Note. Make sure you don't inadvertently click outside the popover window by mistake, this aborts the wizard immediately and any input is lost.

Schedule parameters

Check or set the parameters. Parameter for this report are its property location, these will vary or there could be none depending on the specific report

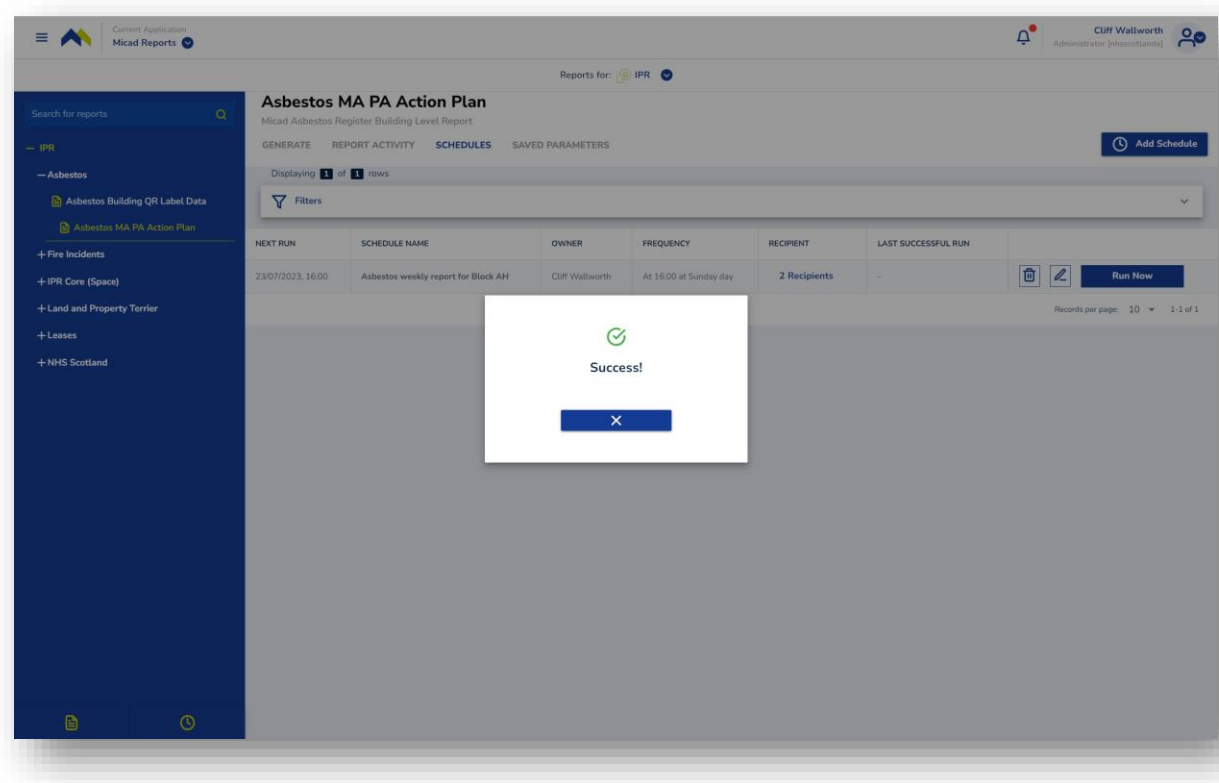
The screenshot shows the 'Add Schedule for: Asbestos MA PA Action Plan' form. The 'Report Parameters' tab is active. The 'GENERAL' section contains three dropdown menus: 'Region' (Queen Margaret Locality, QMH), 'Site' (Queen Margaret Hospital, F80SH), and 'Buildings' (Energy Centrs, Workshops, Laundry, Medical Records Storage, AH). The 'Next Step' button is highlighted in blue.

Click **Next Step**

The screenshot shows the 'Add Schedule for: Asbestos MA PA Action Plan' form. The 'Output Settings' tab is active. The 'Format' dropdown is set to 'PDF'. The 'Base Output File Name' is 'Block AH'. The 'Prefix output with UTC date/time' toggle is turned on. The 'Output Description' is 'Block AH Asbestos MA PA Action Plan report'. The 'Input e-mail recipients' section shows two email addresses: 'cliffw@micad.co.uk' and 'amal.vivianath@micad.co.uk'. The 'Subject' is 'Weekly QMH Block AH Asbestos MA PA Action Plan'. The 'Message' field contains the text: 'Automatic report on schedule from Micad Asbestos Register module. Please see attached PDF.' The 'Skip Empty Reports' toggle is turned on. The 'Save Schedule' button is highlighted in blue.

Choose Format and fill out the email settings. Click the **Save Schedule** button

Success, the schedule was completed and saved.



Example shows a schedule plan that will first execute on 23/07/2023

The schedule is now programmed to be delivered by email.

Schedules list

Use the **Schedules** list to review and edit your report schedule plans

Can also access the Schedules list direct via the **Clock icon** in the footer of the left menu.

The screenshot shows the 'Asbestos MA PA Action Plan' Schedules list in the Micad Reports application. The interface includes a top navigation bar with the Micad Reports logo, a search bar, and a user profile for Cliff Wallworth. The left sidebar contains a search bar and a list of report categories, including 'Asbestos MA PA Action Plan'. The main content area displays the 'SCHEDULES' tab for the 'Asbestos MA PA Action Plan'. It shows a table with one row of schedule data. The table has columns for 'NEXT RUN', 'SCHEDULE NAME', 'OWNER', 'FREQUENCY', 'RECIPIENT', and 'LAST SUCCESSFUL RUN'. The row shows a next run on 30/07/2023 at 16:00, for the 'Asbestos weekly report for Block AH', owned by 'Cliff Wallworth', with a frequency of 'At 16:00 at Sunday day', and 2 recipients. The last successful run was on 23/07/2023 at 16:00. There are icons for 'Add Schedule', 'Filters', 'Run Now', and 'Edit' (pencil icon) next to the row. The bottom of the table shows 'Records per page: 10' and '1-1 of 1'.

NEXT RUN	SCHEDULE NAME	OWNER	FREQUENCY	RECIPIENT	LAST SUCCESSFUL RUN
30/07/2023, 16:00	Asbestos weekly report for Block AH	Cliff Wallworth	At 16:00 at Sunday day	2 Recipients	23/07/2023, 16:00

Click on the **Edit** icon to change the schedule plan details.

Click on the **Delete** icon to remove a schedule

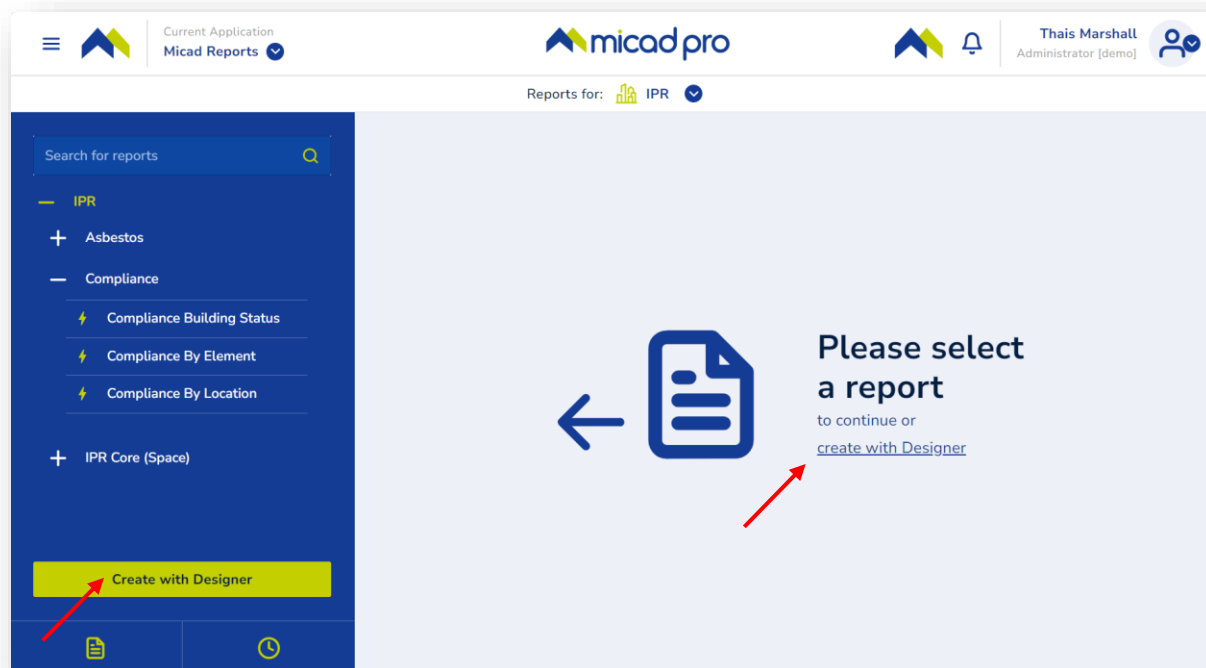
Click the **Run Now** button to test your schedule plan will deliver emails

Designer

'Designer'* is a powerful reporting tool which provides users the ability to create their own custom report by choosing fields and parameters within a topic of their choice. Users can also create custom fields with calculations of existing fields.

Limitation: custom reports are limited to 10,000 rows.

To create a custom report, select 'Create with Designer' button at the bottom of the left-hand side menu, or in the centre of the page.



You'll be prompted to follow a step-by-step guide to create your custom report.

This feature is only available to the following report user profile/roles: report **admin and **user**; report **viewer** can only see public 'Designer' reports created/shared by admins, they cannot create a custom report themselves.*

Create a custom report using 'Designer'

The screenshot shows the 'Create' step of a five-step process to create a custom report. The steps are: 1. Create, 2. Configure Data, 3. Order Data, 4. Configure Filters, and 5. Preview & Publish. The 'Create' step is currently active. It offers two options: 'Create New' (Start a new blank design) and 'Clone Existing' (Clone an existing design). Below these are input fields for 'Report Name' (containing 'Room area report') and 'Report Description' (containing 'This report displays total room area for each building,'). A 'Topic' dropdown menu is set to 'Space Usage'. Under 'Permissions', three options are listed: 'Private' (selected, 'Only you can see this report'), 'Public' (radio button, 'Everyone in your organisation can see this report'), and 'Shared' (radio button, 'Specific people can see this report'). A 'Next Step' button with a right arrow is at the bottom right.

Reports for: IPR

1 Create 2 Configure Data 3 Order Data 4 Configure Filters 5 Preview & Publish

Create New
Start a new blank design

Clone Existing
Clone an existing design

Report Name
Room area report

Report Description
This report displays total room area for each building,

Topic
Space Usage

Permissions

☒ **Private**
Only you can see this report

☐ **Public**
Everyone in your organisation can see this report

☐ **Shared**
Specific people can see this report

Next Step

In the first step, you can define details of your custom report such as if you'd like to start a new report or clone an existing custom report (also created via 'Designer'), report title, description, topic and permissions.

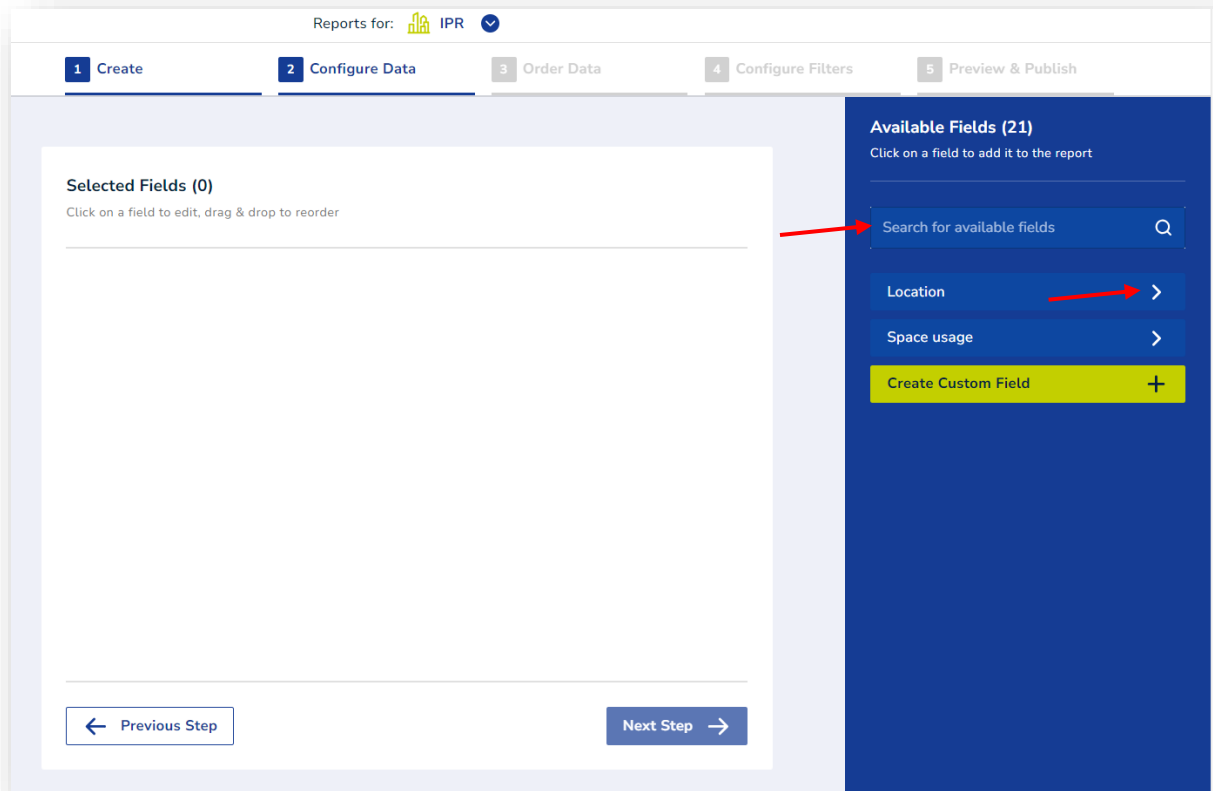
Permissions are as follows:

1. Private: only you can see the report, this option is available for report admin and user.
2. Public: everyone in your organisation can see this report, this option is available for report admin only.
3. Shared: only specific people can see this report, this feature enables a report user to share a custom report they created with an admin and request the admin to consider making their report public.

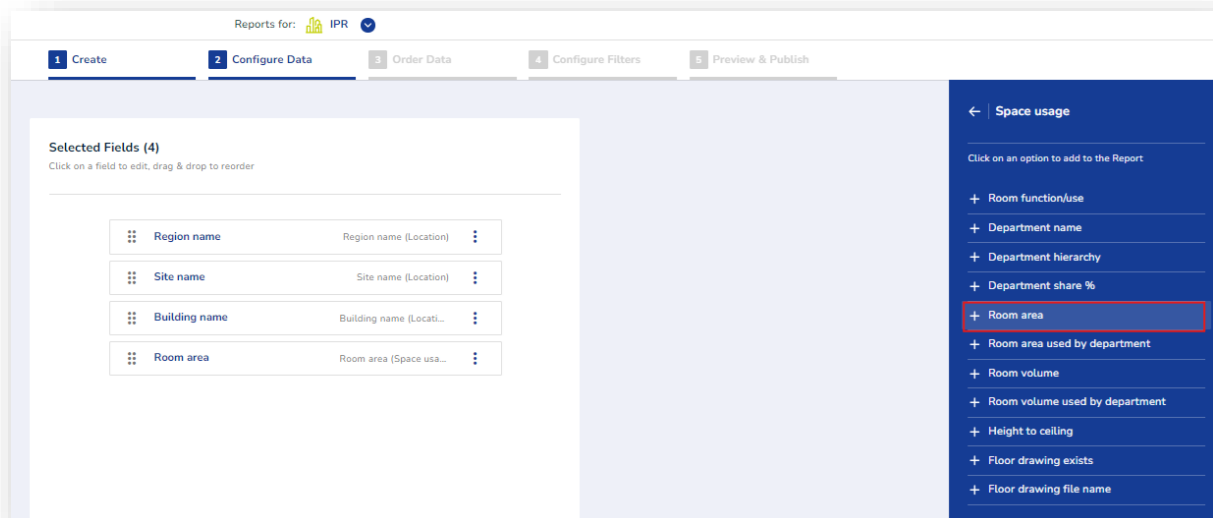
Once you have defined the title, topic and permission of your Designer report, select '**Next step**' button.

Configure data

In this step, you can choose the **columns** you want to see in your report. All **columns** available are shown on the right-hand side menu, you can choose the columns by expanding the folders or using the search bar.



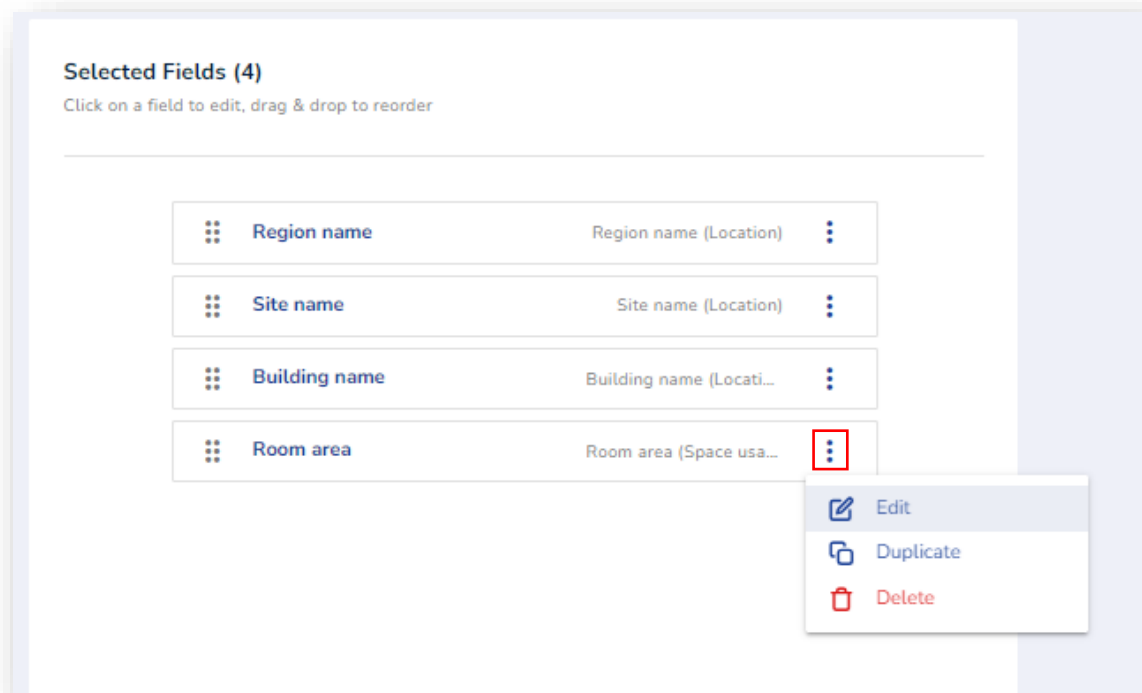
Once you found the column that you want, add it to your report by clicking on it. You'll see all the selected fields at the centre of the page. At this stage, you can change the order of the columns by dragging and dropping the selected fields.



Editing a field

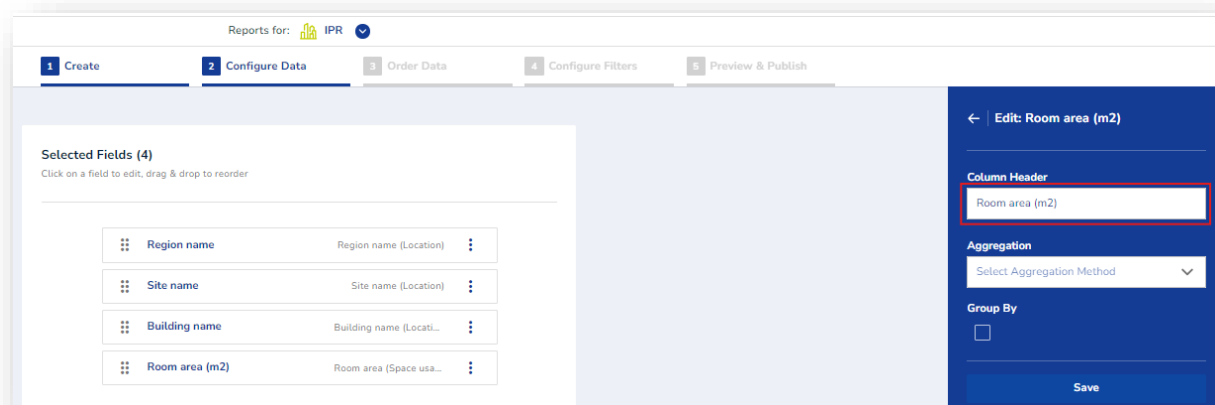
The three dots next to the column names contains configuration options such as **Edit**, **Duplicate** and **Delete**.

To change the name of the column, click on the **three dots** next to the desired field and select '**Edit**'.



This will take you to the right-hand side menu, where you can edit the **column header**.

Once you are happy with the column name, click **Save** and the column name will update in the selected fields section.



Aggregating a field

While editing the field, you can also apply an aggregation to it depending on the type of the field. The rules are as follows:

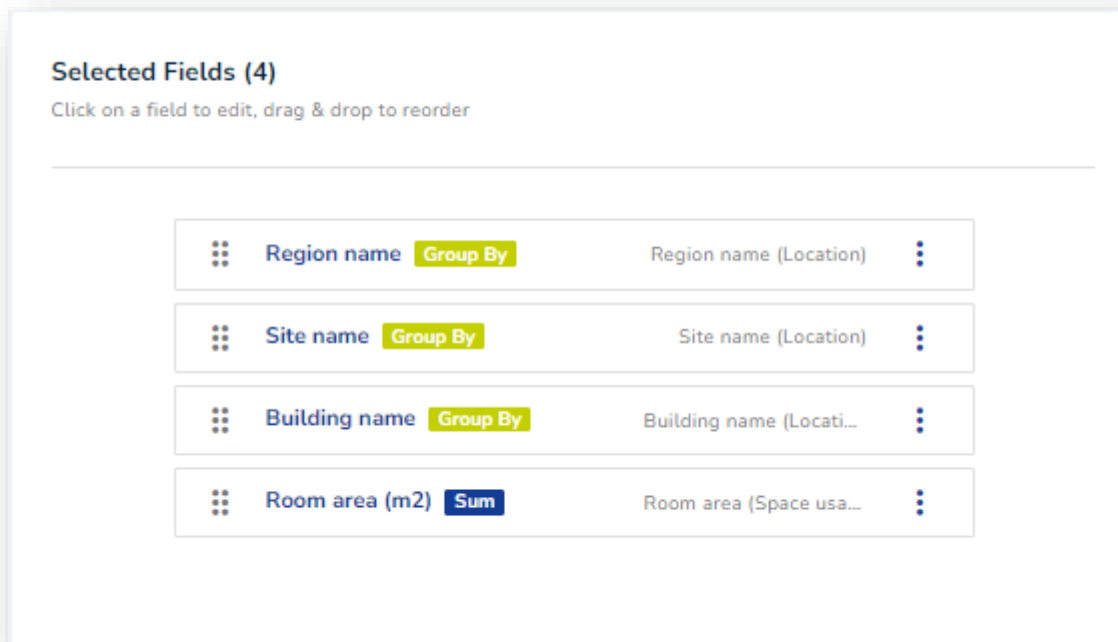
Aggregation types available for **number** type fields:

- Count
- Count distinct
- Average
- Minimum
- Maximum
- Sum

For **text** and **date** fields:

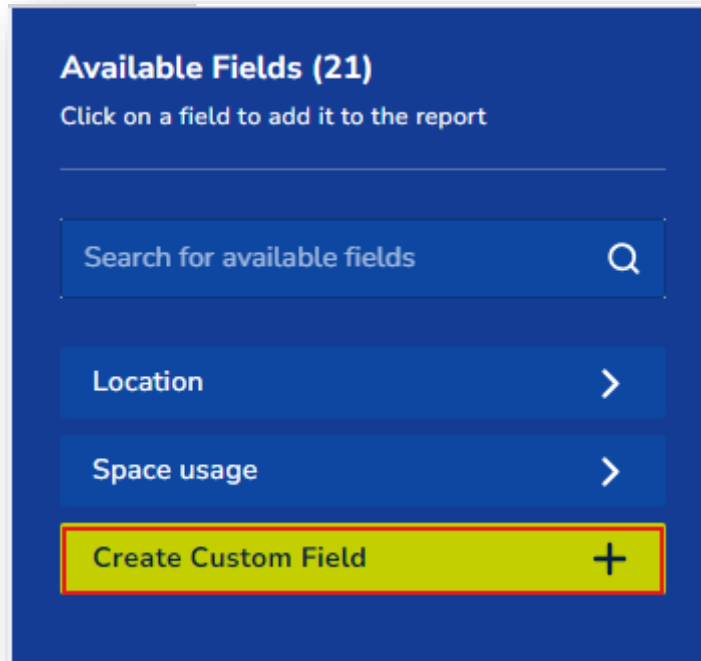
- Count
- Count distinct
- Minimum
- Maximum

When applying an aggregation to a field, all the other fields will automatically be **grouped**. This is shown by the **Group by** tag.



Creating a custom field

On the right-hand side menu, you can opt to create a custom field by clicking '**Create custom field**'. This will bring a popover window up.



On the popover window, **add** the **field name** and the **formula**, then click **Save**.

Note. Make sure you don't inadvertently click outside the popover window by mistake, this aborts the wizard immediately and any input is lost.

Formulas can be:

Static text

A white form titled 'Create Custom Field'. It has two input fields. The first is labeled 'Field Name' and contains the text 'Organisation'. The second is labeled 'Formula' and contains the text '"Airedale"'. At the bottom right, there are two buttons: 'Close' and 'Save'.

Note: use quotation marks when adding text to the custom field.

Calculation

Use numbers or pre-existing fields. Operations available are **addition** (+), **subtraction** (-) , **multiplication** (*) and **division** (/).

Create Custom Field

Field Name

Formula

[Close](#) [Save](#)

Formula

There is a set of pre-defined formulas, they will come up as you start typing. In this example, we'll use *CONCAT()* to display two fields in the same column, separated by a comma.



Create Custom Field

Field Name

Building name and code

Formula

CONCAT(Build)

Building name

Building code



Create Custom Field

Field Name

Building name and code

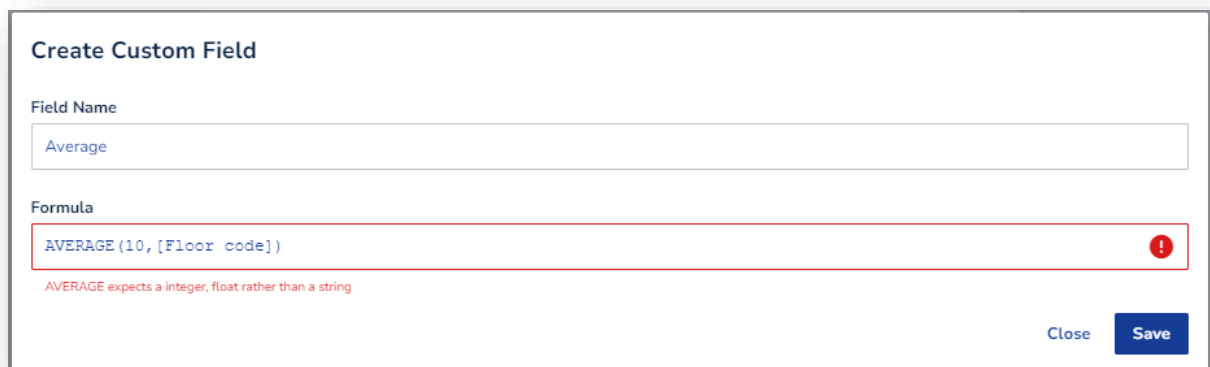
Formula

CONCAT([Building name],", ",[Building code])

Close Save

Note: The formula used in this example: *CONCAT([Building name],", ",[Building code])*

If there are any typos or the data type used in the formula is not correct, a message error will come up and you won't be able to save the custom field until the issue is fixed.



Create Custom Field

Field Name

Average

Formula

AVERAGE(10,[Floor code])

AVERAGE expects a integer, float rather than a string

Close Save

Create Custom Field

Field Name

Organisation

Formula

Airedale

Invalid syntax

Close

Save

The available formulas are:

For data type **number**:

ABS: Returns the absolute value of a number, example: `'ABS(-5)' = 5`

FLOOR: Rounds a number down to the nearest whole number, example: `'FLOOR(10.4)' = 10`

ROUND: Rounds a number to the nearest given number of decimal places or to the nearest whole number if a precision is not specified, example: `'ROUND(4.63, 1)' = 4.6`

CEILING: Rounds a number up to the nearest whole number, example: `'CEILING(54.1)' = 55`

MIN: Returns the minimum value in a set, example: `'MIN([Temperature], 20)'`

MAX: Returns the largest value in a set, example: `'MAX([Number of floors], 2)'`

AVERAGE: Returns the average of a set, example: `'AVERAGE(3.9, 5.47)' = 4.685`

POWER: Raises a base by an exponent, example: `'POWER(3, 2)' = 9`

Date: (example `[Scheduled Date] = 31/01/2024`)

YEAR: Returns the year component of a date, example: `'YEAR([Scheduled Date])' = 2024`

MONTH: Returns the month component of a date, example: `'MONTH([Scheduled Date])' = 1`

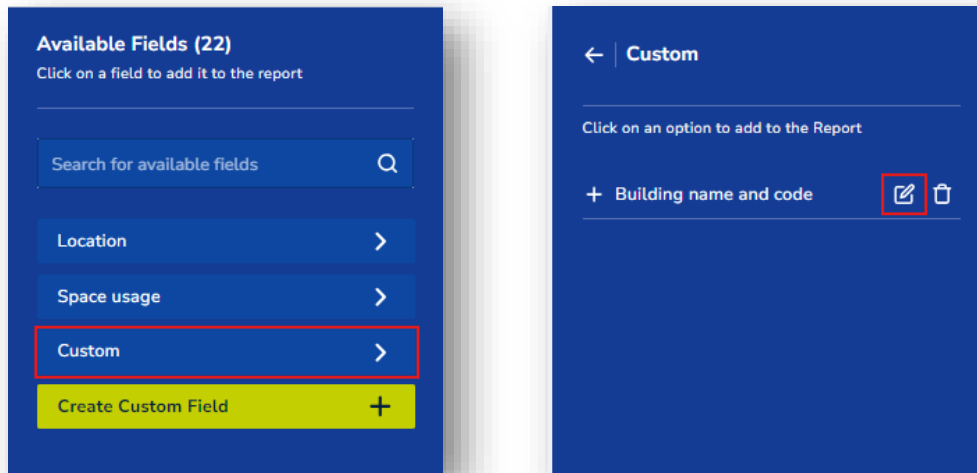
DAY: Returns the day component of a date, example: `'DAY([Scheduled Date])' = 31`

Text

CONCAT: Joins multiple values together into a single string, example: `'CONCAT("Hello ", [Username])'`

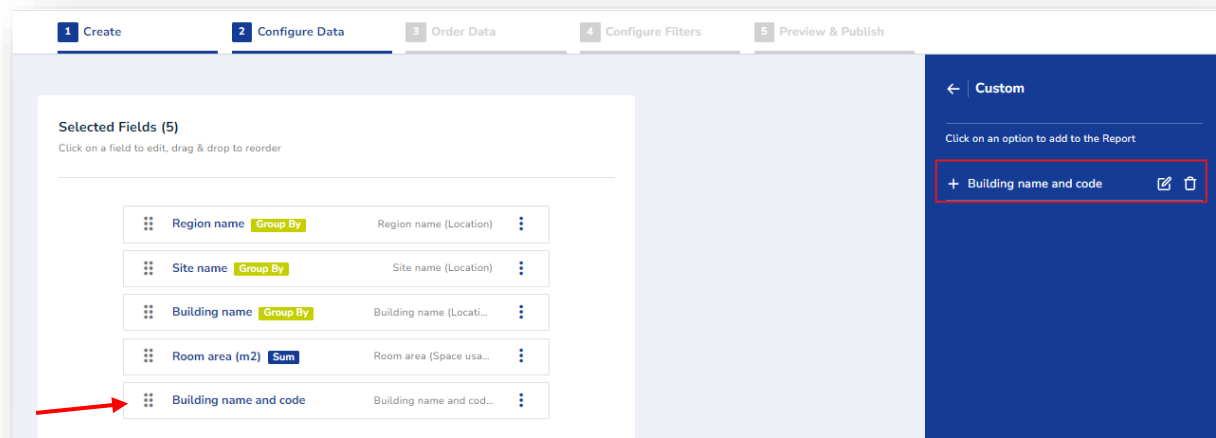
Editing a custom field

To edit your custom field, select the **Custom** folder on the right-hand side menu and click on the **Edit** button, this will bring up the popover window. Edit your field and click **Save**.



Using a custom field

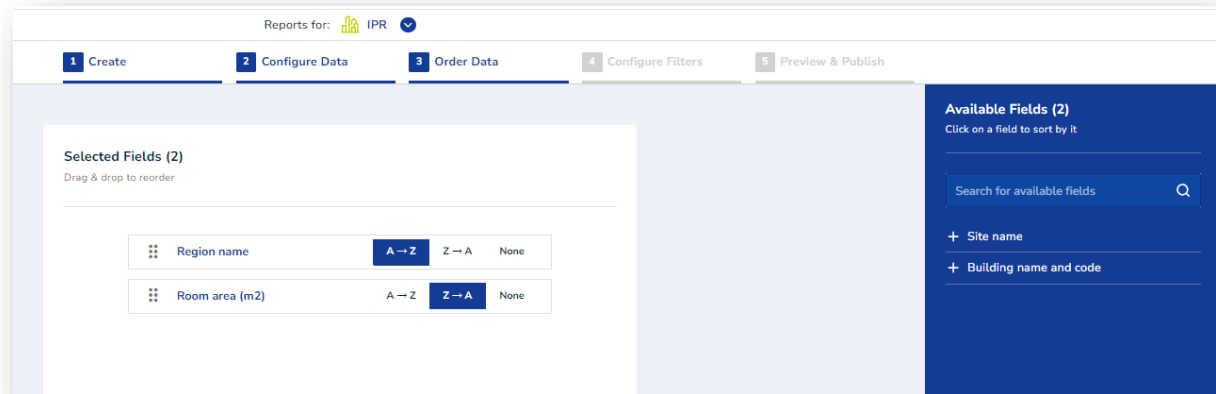
Add your custom field to your report by clicking on it on the right-hand side menu.



Rearrange fields if necessary and click **Next step**.

Order data

Select the fields on the right-hand side menu and the **order** they should follow in the report. Then click **Next step**.



Configure filters

In this step you can select fields that will be the parameters of your custom report. These can be filled when running the report later on.

Select the fields from the menu on the right-hand side, then arrange them in your desired order on the report page by dragging and dropping the selected fields.

Once done, click **Next Step**.

1 Create

2 Configure Data

3 Order Data

4 Configure Filters

5 Preview & Publish

Selected Fields (4)

Click on a filter to edit, drag & drop to reorder

Region name

Region name (Location)

Site name

Site name (Location)

Building name

Building name (Locati...

Room function/use

Room function/use (Sp...

← Previous Step

Next Step →

Available Fields (17)

Click on a field to add it to the report


Search for available fields

Location

Space usage

This is what these parameters will look like on the report page:

Select Parameters - Or - [Import Saved Parameters](#)

Clear All 

GENERAL

Region name

Site name


Building name

Room function/use

Preview & publish

In this final step of creating your custom report, you'll see a preview of the report. If any changes are needed, you can click **Previous Step** to go back and adjust the report configuration.

Once you're satisfied with the preview, click **Save** to finalize the report.

Reports for:  IPR

1 Create

2 Configure Data

3 Order Data

4 Configure Filters

5 Preview & Publish

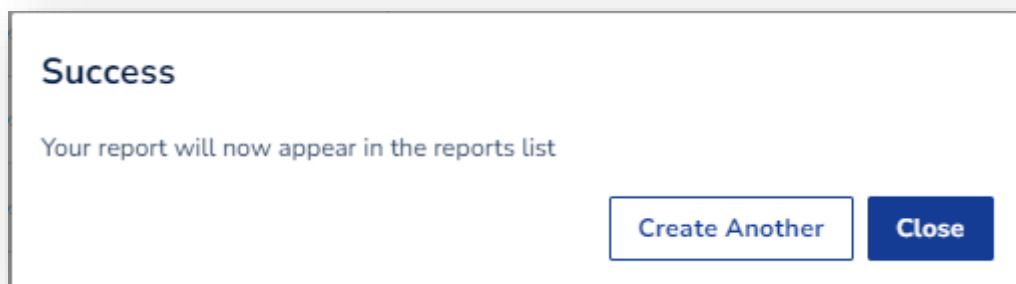
REGION NAME	SITE NAME	BUILDING NAME AND CODE	ROOM AREA (M2)
Airedale NHS Trust	Airedale General Hospital	Theatres (B035), Zone B-5 (B035)	24275.93
Airedale NHS Trust	Airedale General Hospital	Estates Boiler, Wkshops, Spec Nurses, Building 8	20192.76
Airedale NHS Trust	Airedale General Hospital	Radiology, HODU & Richardson, Zone A-14, A-18	20076.6
Airedale NHS Trust	Airedale General Hospital	Day Hospital - Zone D, Zone D	13357.44
Airedale NHS Trust	Airedale General Hospital	Emergency Department (ED) (A&E), ED	13175.35
Airedale NHS Trust	Airedale General Hospital	Labour Ward, Maternity Assessment Centre, Building 001, Zone B-17	9173.01
Airedale NHS Trust	Airedale General Hospital	Outpatients Department - Zone A, Zone A-01	8400.92
Airedale NHS Trust	Airedale General Hospital	Ward 020 - Surgical Day Unit, Zone B-16	7076.16
Airedale NHS Trust	Airedale General Hospital	Estates & Facilities, IT, Laundry, Building 5 (B019-L1)	6686.36
Airedale NHS Trust	Airedale General Hospital	Admin East, IT Dept, Med Records, Zone C-C48	6350.28

Records per page: 10 1-10 of 10

← Previous Step

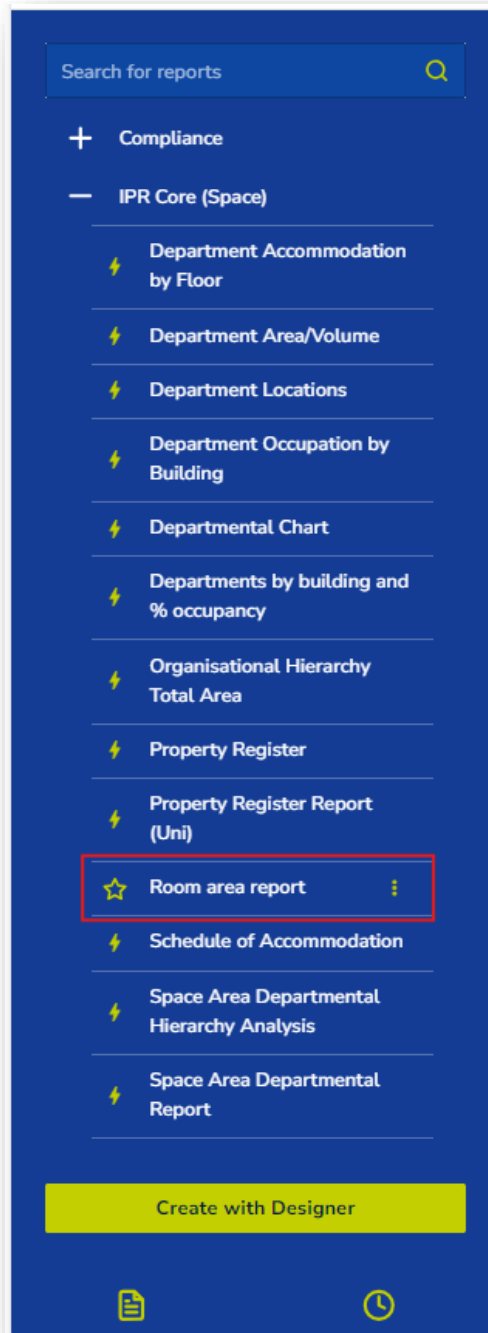
Save →

A success message will appear, allowing you to either close the Designer wizard or proceed to create another report.



Generate your Designer report

The custom report you created will appear in the report tree on the left-hand side menu, under the topic you selected. Custom reports are marked with a star icon for easy identification.



This custom report can now be run on demand or scheduled like any other report.

Reports for: IPR

Room area report

This report is limited to 10,000 rows
This report displays total room area for each building.

GENERATE REPORT ACTIVITY SCHEDULES SAVED PARAMETERS

Select Parameters - Or - [Import Saved Parameters](#) [Clear All](#)

GENERAL

Region name

Site name

Building name

Room function/use

Generate Report

Report Name *
Room area report

Format *
PDF

Save Parameters

Generate Ad Hoc Report

Share Report

Add email recipients

Share Report

Available topics on the 'Designer'

These are the topics currently available on the 'Designer':

- Asbestos
 - Asbestos Location Status
 - Asbestos Survey Item Status
 - Asbestos Current Inspection
 - Asbestos Events
 - Asbestos Remedial Actions
- Leases
- Terrier
- Compliance
- IPR Core
 - Documents
 - Space Usage
- Fire Incidents
 - Incidents
 - Action Points
- Fire Risk Assessment
 - Open Action Points

Release notes

04/10/2024 PRO

API version **1.0.22485** to **1.0.22918**

- 12774** FM report: Resource Timesheet Enhanced feedback
- 13373** SFM report: Add 'Custom Form Output' report to micadpro
- 13418** Terrier 'Designer' topic bug fix
- 13392** Use default parameter value provided in yml
- 12257** Make CSV An Option for Export (non-default)

16/10/2024 SAMS

UI version **1.0.22037** to **1.0.22476**
API version **1.0.22258** to **1.0.22961**

- 13168** Micad Reports: Licence permission
- 13030** Designer: ability to turn on/off for non-micad users
- 12864** Populate date parameters from selected date range
- 13063** Add Fire Risk Assessment tile
- 13233** Designer permission at module level
- 13232** Designer permission at client level
- 13042** NR2 Phase 1 update
- 12257** Make CSV An Option for Export (non-default)
- 13287** Make TR1 visible to all users
- 13287** Update 'Division' field in LE1
- 13392** Use default parameter value provided in yml
- 13418** Terrier Designer topic bug fix
- 13454** Add new 'Subelement ID' column on NHSS Appraisal template
- 13520** Designer: correct spelling of Terrier topic field labels
- 13524** Designer: Terrier topic preview error

END