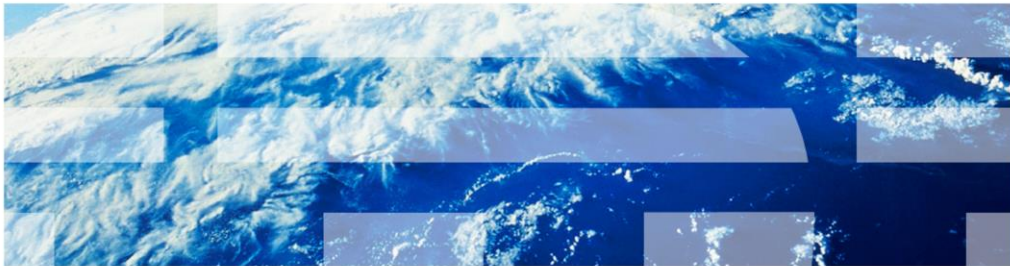


IBM Maximo Asset Management version 7.1

Creating and using a query-based report



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This training module is for Maximo Asset Management version 7.1. In this module you learn to create and run a query-based report within the Maximo user interface.

Objectives

When you complete this module, you can perform the following tasks: :

- Create a query-based report
- Run a query-based report

In this module you cover the following topics:

- Creating a query based report
- Running a query based report

Query-based reports

Features for building user reports:

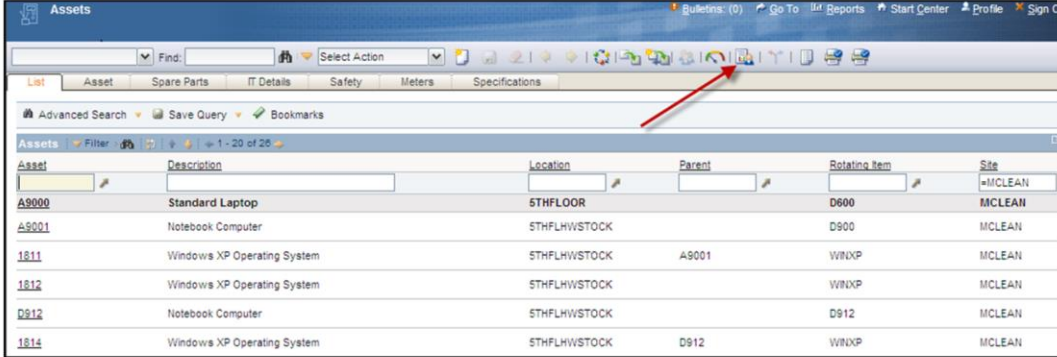
- Run the utility within the BIRT engine without needing the BIRT (Business Intelligence and Reporting Tools) Designer
- Build for a unique user or business case
- Build for limited distribution
- Create them within applications without requiring use of development skills
- Use Maximo user level security

Query-based reports are a method to build and run user reports. The reports run within the BIRT report engine but do not require use of the BIRT Designer to create them.

The reports are intended for a unique user or business case and are not intended for mass distribution. Creating these report does not require development skills. You create the reports by using Maximo applications. Maximo user level security is utilized.

Selecting a report query

1. Run a query that the report is to be based on
2. Click the **Create Report** button



Assets

Bulletins: (0) Go To Reports Start Center Profile Sign Out

Find: Select Action

List Asset Spare Parts IT Details Safety Meters Specifications

Advanced Search Save Query Bookmarks

Assets Filter 1 - 20 of 26

Asset	Description	Location	Parent	Relating Item	Site
A9000	Standard Laptop	5THFLOOR		D600	MCLEAN
A9001	Notebook Computer	5THFLHWSTOCK		D900	MCLEAN
1811	Windows XP Operating System	5THFLHWSTOCK	A9001	WINXP	MCLEAN
1812	Windows XP Operating System	5THFLHWSTOCK		WINXP	MCLEAN
D912	Notebook Computer	5THFLHWSTOCK		D912	MCLEAN
1814	Windows XP Operating System	5THFLHWSTOCK	D912	WINXP	MCLEAN

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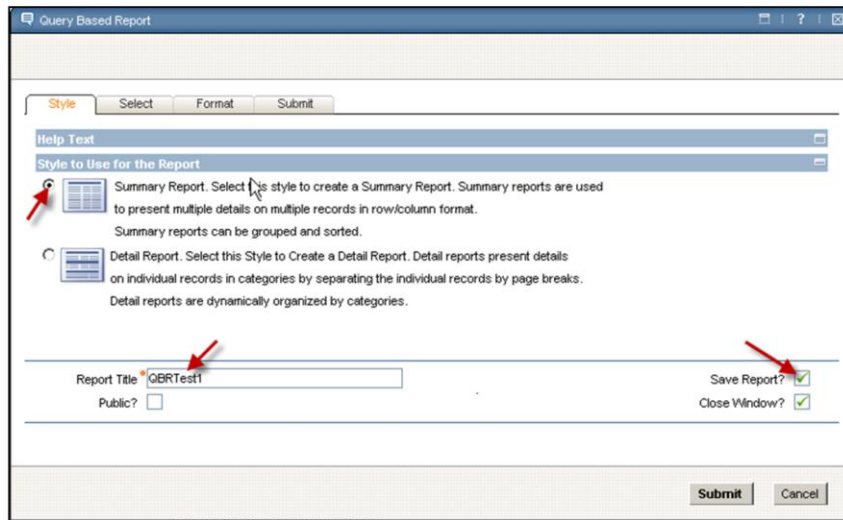
In this example, you create a new report from the asset application. You can use the same method of creation within many other Maximo applications.

Before creating the report, you can use the search fields of the application to create the query the report is to use. In this instance, base the search on SITE being equal to MCLEAN by typing the value into the SITE search field and pressing Enter.

After the query has run, click the **Create Report** button, which opens the Query Based Report window.

The report style

1. Click the report style
2. Type a report title
3. Click **Save Report**

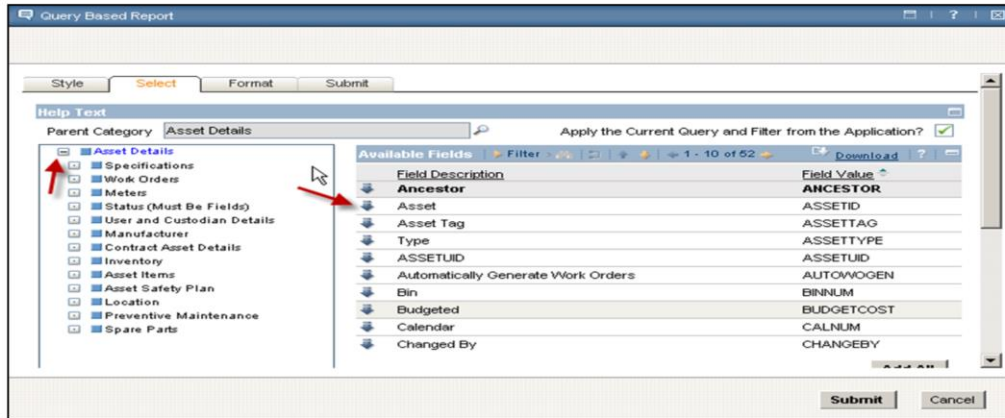


On the **Style** tab of the Query Based Report window, click the **Summary Report** option, Give the report a meaningful title, and click **Save Report**.

Click the **Select** tab.

Selecting a report category

1. Select the category from the tree on the left
2. Add fields to the report from the available list by clicking the arrows next to the fields as required
3. Ensure the check box is selected for **Apply the Current Query and Filter from the Application ?**



Creating and using a query-based report

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This slide shows the **Select** tab of the Query Based Report window.

On the left of the screen, if you click a category from the tree, the available fields for that category display on the right side of the screen.

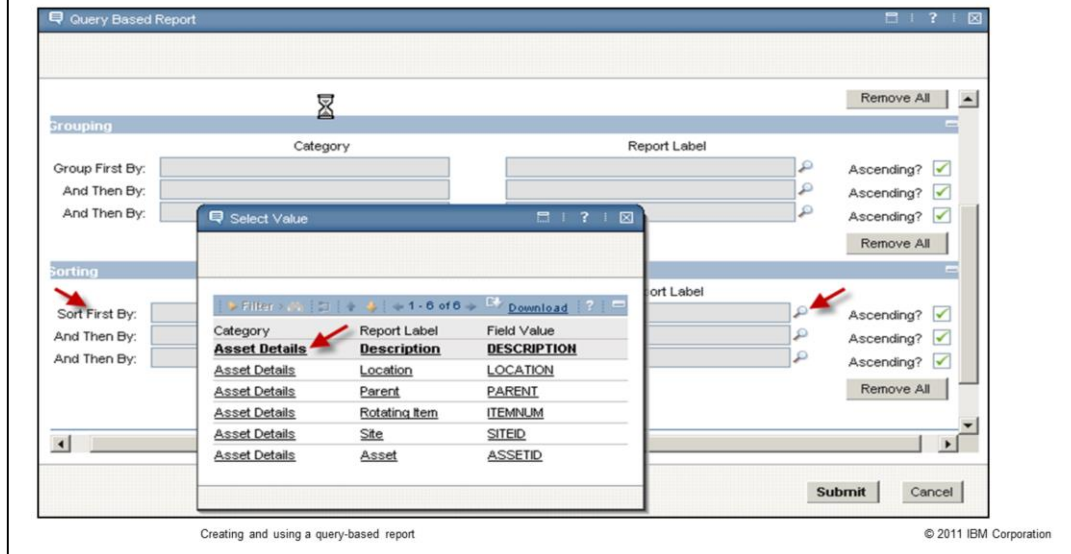
Click the arrow that is next to any available field to add it to the selected fields for the report output. You can scroll down to see the selected fields.

Select the **Apply the Current Query and Filter from the Application** option.

Click the **Format** tab.

Formatting a report

1. Add filters
2. Select output grouping
3. Select sorting criteria



Optionally, on the **Format** tab of the Query Based Report window, you can add filters, group the results, and sort them. You can use the scroll bar to view all options.

Click the appropriate magnifying glass icon to select the required values.

For this example, click the magnifying glass icon that is next to the **Sort First By** field. This action opens the Select Values window, where you can click fields to select them. Click any field to sort the output based on this field.

Click **Submit**.

Selecting a report output type

1. Click **Immediate**
2. Click **PDF**
3. Click **Submit**

The screenshot shows the 'Query Based Report' window. At the top, it says '...No rows to display...'. Below this is the 'Schedule' section with three radio button options: 'Immediate' (selected), 'At this Time' (with a date-time input field), and 'Recurring' (with a frequency input field). Below the 'Schedule' section is the 'E-mail' section with three input fields: 'To', 'Subject', and 'Comments'. At the bottom left is the 'File Type' section with two radio button options: 'PDF' (selected) and 'XLS'. At the bottom right are two buttons: 'Submit' and 'Cancel'. Red arrows point to the 'Immediate' radio button, the 'PDF' radio button, and the 'Submit' button.

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This slide shows the Query Based Report window.

Click the **Immediate** option to run the report now.

Click the **PDF** option to select the PDF output format.

Click **Submit** to submit the report.

The report output

The report output is in the browser

The screenshot shows a browser window with the title 'Reporting' and the IBM logo. The page number is 'Page 1 of 1'. The report title is 'QBRTest1'. The report content is a table with the following columns: Description, Location, Parent, Rotating Item, Site, and Asset.

Description	Location	Parent	Rotating Item	Site	Asset
COMP_EQU,COMPUTER_DESKTOP, 266.00 GHZ, 64.00 MB, 4.00 GB			D66	MCLEAN	1444
COMP_EQU,COMPUTER_DESKTOP, 4.00 GB, 266.00 MHZ, 64.00 MB			D66	MCLEAN	1445
Database software for the desktop	STHFLOOR	1999B	ACCESS 2002	MCLEAN	1485
IT (UNSPSC),Components,Media storage devices,Hard disk drive, 2.00 GB	STHFLOOR	2002	HD4532	MCLEAN	1478
IT (UNSPSC),Components,Media storage devices,Hard disk drive, 2.00 GB	STHFLOOR	2001	HD4532	MCLEAN	1479
IT (UNSPSC),Components,System cards,Memory module	STHFLOOR	2001	SDRAM	MCLEAN	1479

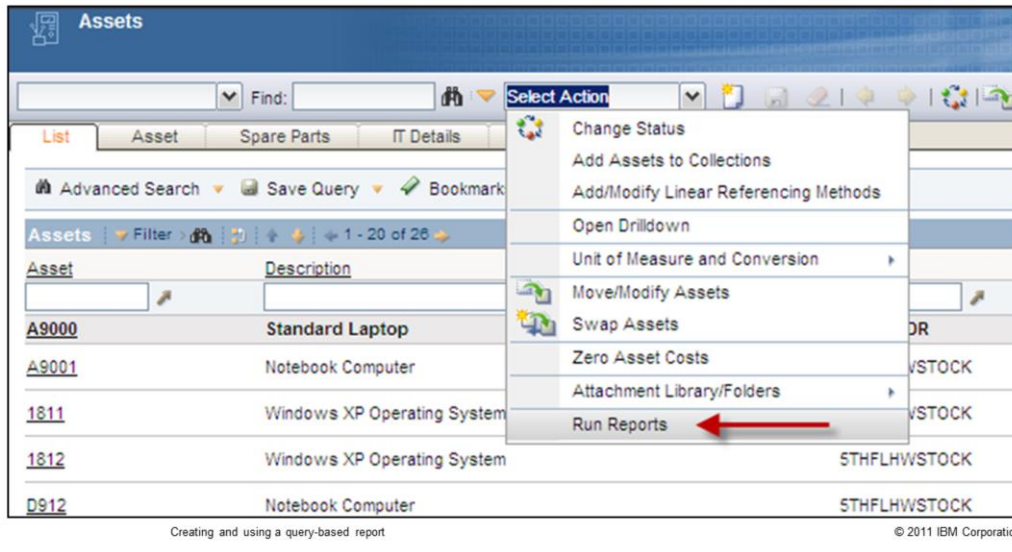
At the bottom of the browser window, it says 'Creating and using a query-based report' and '© 2011 IBM Corporation'.

The browser window shows the report output.

Running the saved report (1 of 2)

Run the report again as follows:

1. Go to the asset application
2. In the **Select Action** list menu, click **Run Reports**

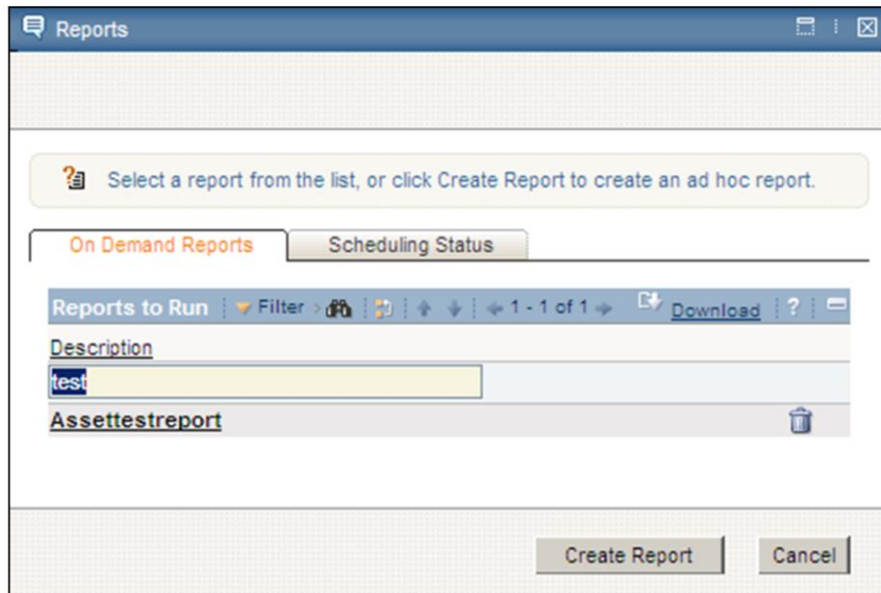


Because you saved the report you created, you can run it again at any time from the asset application where you created it.

Go to the asset application and click **Select Action > Run Reports**.

Running the saved report (2 of 2)

Click the report name to run it. If necessary, use the filter field to help locate the report



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On the Reports window, click the report name to run the report.

You can use the search field to help you find the report name.

Summary

Now that you have completed this module, you can perform the following tasks:

- Create a query-based report
- Run a query-based report

You have completed this training module. You should now be able to perform these tasks:

- Creating a query based report
- Running a query based report



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