Testing Cheat Sheet Cheat Sheet

by stevewilcoxjr via cheatography.com/27903/cs/9087/

Grid Reports

Grid Reports are flexible, versatile tools for displaying response data. Grid Reports are the most frequently used reporting solution in the InMoment platform.

Grid Report Types

Detail Reports

Display one response per row and allow you to drill into the Survey Detail Window
Examples: Comments, Raw Data, etc.
Show Line Item Details = Never

Summary Report

Display calculated results from multiple responses per row
Examples: Crosstab, Counts, Comparisons
Show Line Item Details = Always

Summary with Details (Combo)

Runs as a Detail at the Location Level and as a Summary above
Examples: Summary, Rescue Summary, Alert Summary
Show Line Item Details = Locations Only

Grid Report Build Screen Sections

Report Title

Give the report a name and description

Report Columns

Used to format and display a reportable dataset after runtime

Report Criteria

Report filters applied before runtime and used to query a reportable dataset

Report Options

Configure reporting options including:
- Show Line Item Details
- Web Access Rights
- Folder
- Default Runtime Format

Criteria Section

Report Filters used to query a dataset.

Criteria Requirements

1. Date Component

The system requires every grid report to have a date component in the criteria.
Example: Date of Survey

2. Hierarchy Component

The system requires every grid report to have a hierarchy component in the criteria.
Example: Dynamic Hierarchy

Criteria Inclusion Types

Required	Visible, adjustable, and not dismissable. Applied at runtime.
Hidden	Not visible nor adjustable, but applied at runtime
Included	Visible, adjustable, and dismissable. Applied at runtime unless dismissed.
Available	Available to be added (found within the Add Criterion drawer). Not applied at runtime, unless added.

Content Section

The main contents of a report that display after a report has been run.

Key Types of Columns

Standard	Org Fields
	System Fields
Calculated	Column A **+** Column B
	Column A **-** Column B
	Column A ***** Column B
	Column A **/** Column B
	Column A **/** Column B
	(Column B **-** Column A) **/** Col. B

Key Types of Columns (cont)

Static	Date
	Whole Number
	Decimal Number
	Text

Key Features - Summary Columns

Grouping	Dynamic Hierarchy Level(s)
	Static Hierarchy Level
	Answer Selection (Segment)
Totaling	Average (<>)
	Count (#)
	Percentage (%)
Precision	Whole Number (0)
	Decimal (0.0, 0.00, etc.)
Column Filters	Calculating Percentage (%)
	Calculating Count (#)
Linked Reports	Hyperlinks allowing drill down navigation

Key Features - Detail Columns

Coloring	Default Palette
	Custom HEX Code
Format	Default
	Integer, No Separators
	Money, Two Decimals
Default Sort	Ascending
	Descending

Adding Report Columns

New Fields	Add Multiple Fields
	Advanced Add & Configure *(Single Field Only)*
Filter Fields	Data Field Name
	Data Field Type
	Survey Association
	Display All or Unused Fields

By **stevewilcoxjr**

cheatography.com/stevewilcoxjr/

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Adding Report Columns (cont)

Copy Column	From same report
	From another report

Key Updates - Report Edit Screen

Bulk Updates	Delete Columns
	Set Background Color *(Default Palette Only)*
	Adjust Column Visibility
	Adjust Column Totaling
	Adjust Totaling Precision
Column Updates	Move, Edit, Copy, Delete
	Adjust Labels
	Adjust Visibility
	Adjust Totaling
	Adjust Totaling Precision
	Group/Ungroup
	Adjust Width

Key Updates - Column Edit Screen

Sorting	Descending (z-a)
	Ascending (a-z)
Background Color	Custom HEX
	Conditional Formatting
Format	Default numeric
	Integer, No Separators
Column Filters	Total Percent (%)
	Total Count (#) Subsets
	Total by Adjusted Date
Totaling Options	Multi-level Grouping
	Dynamic Hierarchy Only
Alignment	Left
	Center
	Right
Goals	Applied to a column

Column Visibility Types

Always	Always display column
Hidden	Never display column
Summary Only	Display column if report is run above Location Level. *(Combo Grid Report Only)*
Detail Only	Display column if report is run at the Location Level. *(Combo Grid Report Only)*

Column Calculation Types

None	
< >	Average
%	Percentage
#	Count
<>#	Average Count
1#	Distinct Count
∑	Sum
^	Max
V	Min

Report Options Section

Options and defaults applied to the report

Key Configurations - Report Options

Show Line Item Details	Never
	Always
	Locations Only
Folder	Assign to a folder
Web Access Policy	By Level
	All Users
Output Format	Default to HTML
	Default to CSV
	Default to PDF
Benchmarking	Static Level
	Dynamic Level
Hide Information	Empty columns
	Test Data
	Hyperlinks in PDF

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