

### 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

**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

**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



By **stevewilcoxjr**

[cheatography.com/stevewilcoxjr/](https://cheatography.com/stevewilcoxjr/)

Not published yet.

Last updated 21st August, 2017.

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### Key Updates - Report Edit Screen (cont)

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

### Column Calculation Types

None

< > Average

% Percentage

# Count

<># Average Count

1# Distinct Count

Σ Sum

^ Max

V Min

### 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

### 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

### 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)*

