Working with the Report Manager

TEMPO 5 features a Report Manager and online Report Editor to give you complete control over creating and managing flyer-style listing reports. In addition, you have statistical reporting capabilities for analyzing market trends and determining agent and office performance.

The list of reports can be quickly and easily sorted, rearranged, and filtered with each column giving you an overview of reporting details.

▶ To access the Report Manager:

- From the main menu, click **CMA & Reports > Report Manager**.

  The Report Manager main page opens.

▶ To change the Report Manager list view:

1. From the Report Manager page, you can change the list view by clicking a column header to sort the list in ascending or descending order.

   2. Narrow the list of records displayed by applying a simple filter. Click one of the following drop-down lists:

- **Report** — choose a report category, for example, **MLS** or **Tax**.

- **Type** — select what kind of reports you want to view, for example, **All**, **Residential**, **Open House**, etc.

3. To filter the list of reports by **Owner**, click the drop-down list and choose:

- **All** — displays all reports in the system.

- **System** — displays all <u>read-only</u> reports.

- **Office** — displays all reports specific to your office.

- **Personal** — displays all <u>editable</u> reports that you have created yourself.

- **Board** — displays all reports specific to your MLS Board.

NOTE! *To view the entire list of reports, select **All** from the **Report** and **Owner** drop-down lists.*

   4. Select one or more reports, then use the action buttons to perform specific tasks:

- **New Report** — create a new report. See

- Creating a New REPORT.

- **Copy Report** — copy an existing report. See

- Copying an Existing REPORT.

- **Rename Report** — change the name of an existing report. See

- Renaming a Personal REPORT.

- **Edit Report** — modify an existing report. See

- Editing a Personal REPORT.

- **Delete Report** — delete an existing report. See

- Deleting a Personal REPORT.

NOTE! *You can only edit, rename or delete Personal reports that you created yourself. The TEMPO 5 pre-designed System reports are NOT editable.*
You must make a copy of a System report and rename it after making changes.

Creating a New Report

You can create a new report from scratch, or copy an existing report to use as a template for your new Personal report.

▶ **To create a new report:**

1. From the Report Manager page, click the **New Report** button.

    The New Report dialog box opens in conjunction with Report Editor.
    See Using the Report Editor.

2. From the **Report** drop-down list select a category, for example **MLS**.

3. From the **Type** drop-down list, select the kind of report you want to create.

    4. Click **OK**.

    The Report Editor opens with the corresponding report type data fields.

5. Use the editor's functionality to design the report. See Using the Report Editor.

6. When you are finished, click the **Save** tool bar icon.

    The Save Report dialog box opens.

7. Enter the **Report Name** and an optional **Report Description**.

8. Select the **Make this report only available for CMAs** check box to enable this function.

9. Click **OK**.

    The *"Report has been saved"* message box appears.

    10. Click **OK**.

    11. Click **Close**.

    You are returned to the Report Manager page where the new report is displayed in the list.

Copying an Existing Report

You can copy any type of report in order to create a new report with similar features.

NOTE! *You can only copy one report at a time.*

▶ **To copy an existing report:**

1. From the Report Manager page, select the report you want to copy.

    2. Click **Copy Report**.

The Report Editor opens.

3. Use the editor's functionality to re-design the selected report. See Using the Report Editor.

4. Click the **Select category** drop-down list in the upper left corner and choose the category to which the report will be saved.

5. Click the **Save As** tool bar icon.

The Save Report dialog box opens.

6. Enter a new **Report Name** and an optional **Report Description**.

> *note!* *If you accept the original report name, your new report will be saved with the same title as the original report. The difference is your new copy is a Personal report that you can edit, whereas, the original is a System report that is read-only.*

7. Select the **Make this report only available for CMAs** check box to enable this function.

8. Click **OK**.

The *"Report has been saved"* message box appears.

9. Click **OK**.

10. Click **Close**.

You are returned to the Report Manager page where the copied report is displayed in the list.

Editing a Personal Report

> **NOTE!** *You can only edit a Personal report (one that you have created). TEMPO 5's pre-designed System reports are not editable. You must make a copy to edit.*
> *See*

> **NOTE!** *Copying an Existing Report.*

▶ **To edit a Personal report:**

1. From the Report Manager page select the report you want to edit:
   - click the report line item directly; or
   - click the check box of the target report, then click the **Edit Report** button.

> *note!* *You can only edit one report at a time. If you select multiple reports, the **Edit Report** button will NOT be available.*

The Report Editor opens. See Using the Report Editor.

2. Make changes to the report. See

2. Creating a New REPORT.

3. When you have completed your modifications, click the **Save** tool bar icon.

The Save Report dialog box opens.

4. Click **OK**.

A message box appears confirming the report has been saved.

5. Click **OK**.

6. Click **Close**.

You are returned to the Report Manager page.

Renaming a Personal Report

NOTE!   *You can only rename a Personal report (one that you have created). TEMPO 5's pre-designed System reports are not editable.*

▶ To rename a Personal report:

1. From the Report Manager page, select the report you want to rename.

> *note!*   *You can only rename one report at a time. If you select multiple reports, the* **Rename Report** *button will NOT be available.*

2. Click **Rename Report**.

The Rename Report dialog box opens.

3. Change the **Report Name**.

4. Enter the **Report Description**.

5. Select the check box if you want this report to be available to CMAs.

6. Click **OK**.

A message box appears confirming the report was successfully renamed.

7. CLICK **OK**.

Deleting a Personal Report

NOTE!   *You can only delete a Personal report (one that you have created). You can NOT delete any of TEMPO 5's pre-designed System reports.*

▶ To delete a personal report:

1. From the Report Manager page, select one or more Personal reports that you want to remove permanently.

2. Click **Delete Report**.

A message box appears, prompting you to confirm the deletion.

3. Click **OK**.

A confirmation message appears.

4. Click **OK**.

The reports no longer appear in the Report Manager list.

Setting a Favorite Reports List

To make it easy to quickly view your favorite reports on the Listing Detail page, TEMPO 5 lets you maintain a list of the reports you use most often. A different list of favorite reports can be set up for each property type.

NOTE!   *You can choose up to six (6) reports for each Property Type. These appear as Favorite Quick Links on the Listing Details page and are highlighted in yellow.*
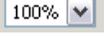
Using the Report Editor

The Report Editor enables you to design new reports or modify copies of System reports. You can apply word processing-like formatting, insert data fields, objects and more.

To access and use the Report Editor:

1. From the Report Manager page:

   • click **New** to create a new personal report; or

   • click **Edit** to modify a copy of a system report

   The online Report Editor opens.

   NOTE!   *Using the mouse, point to any tool bar icon to see a description of what it does.*

Icon	Description
	Page Setup — Select page size, orientation and set margins.
	Cut, Copy and Paste — Cut or copy selected text to the clipboard. Paste or insert the clipboard text at the cursor's insertion point.
	Bring to Front, **Send to Back**, **Delete Object** — Layer objects or groups of objects from front to back. Delete an object.
	Zoom — Change the page viewing size.
	Show/Hide Rulers/Gridlines — Turn rulers and grid lines on or off.
	Snap to Grid — Objects when dragged onto the form are aligned to the nearest grid line.
	Font and Size — Select the font name and size (in points).
	Bold, Italic, Underline, Font Color, Outside Border — Add attributes to selected text. Put a box around a selected object.
	Align Left, Center, Align Right — Aligns selected text.
	Align Tops, Align Middles, Align Bottoms — Aligns selected objects.
	Align Lefts, Align Centers, Align Rights — Aligns selected objects.
	Add/Delete Page — Append a new page to the report. Remove a selected page from the report.

Page 1 ▾	**View Page** — Select a page to view from multiple report pages.

Setting Up a Report Page

To produce a well-designed report, use the available guidance tools, like grids and rulers, to accurately line up page elements.

▶ **To set up your work space settings:**

1. Select a zoom level from the **[xxx%]** drop-down list.

   The view size is adjusted accordingly.

2. Click the **Grid** tool bar icon to show (or hide) grid lines on the page.

NOTE! *The grid lines are only a design aid; they are not part of the report and will not be displayed when viewing or printing the final report. The grid lines also indicate the usable page area as determined by the* ***Margins*** *setting under Page Setup. Objects cannot be placed or moved outside the grid area.*

3. Select **Snap to Grid** to make objects automatically line up with the grid lines when they are moved or resized.

4. Click the **Rulers** tool bar icon to display (or hide) rulers at the top and to the left of the page.

▶ **To set up the report parameters:**

1. Click the **Page Setup** icon.

   The Page Setup dialog box opens.

2. Select:

   • **Page size** — Letter or Legal.

   • **Orientation** — Portrait or Landscape.

   • **Margins** — Top, Bottom, Left and Right.

3. Click **OK**.

4. Click the **Select category** drop-down list and choose a type of report.

   The corresponding data fields are displayed in a list on the left side.

▶ **To manage report pages:**

1. Click the appropriate tool bar icon:

   • **Add Page** — a new blank page is appended to the end of the report.

   • **Delete Page** — deletes the page you are currently viewing and all of its contents.

2. To view a specific page number (other than the one you ar currently working on), select the page number from the drop-down list.

Working with Objects

Text labels and image files that can be placed on the report page are all considered "objects" and are categorized into three groups: **Data Fields**, **Images**, and **Miscellaneous**.

▶ To add Data Fields:

1. Click **Data Fields** in the category list at the bottom left corner of the page.

   The available field names are displayed in the list.

2. Select the **Include Label** check box to ensure that when you drag data fields onto the form, the names (or labels) go also.

   note! *It is recommended you select the **Include Label** check box.*

3. Click and drag one or more data field objects from the list onto the page.

   note! *This is where it's nice to have the grid lines and rulers displayed for easy line-up.*

4. Use the tool bar buttons as needed.

▶ To add Images:

1. Click **Images** in the category list at the bottom of the left column.

2. Click the **Select category** drop-down list at the top of the left column and choose an image type (for example **Agent Image**, **MLS Image**, etc.).

   note! *Select the **image slot number**, if required.*

   The corresponding image merge codes appear in the list.

3. Click and drag one or more image merge code objects from the list onto the page.

   A box representing an image appears on the form.

   • Some image categories have the **Manage images** link to help add, edit or delete images from the database. The TEMPO 5 image submission window opens.

4. Use the tool bar buttons as needed.

▶ To add Miscellaneous objects:

1. Click **Miscellaneous** in the category list at the bottom of the left column.

   A **Label Object** appears in the list. This is just an outline for a new text label.

   note! *You can also use the Label Object to add graphical elements to the report. For example, you can create a label object, delete the text, give the text object a border, and the resize it to create a large rectangle. Other fields can then be placed inside the rectangle to group them visually.*

2. Click and drag one or more Label Object(s) from the list onto the page.

   Once on the page, the object is entitled "New Label".

3. Click inside the object's parameters to display the cursor.

    4. Make modifications by typing a new label name, etc.

5. Use the tool bar buttons as needed.

▶ To select one or more objects on a page:

NOTE!   *An object must be selected before you can delete it or modify its properties.*

1. Click the object once.

   The object appears 'outlined' to indicate that it is selected.

   • to select a group of objects, hold down the **CTRL** key while clicking on additional objects.

       2. Another way to select a group of objects is to click and drag on an empty area of the page to create a "selection rectangle."

   • extend the rectangle around the objects that you want to select. When you release the mouse button, the objects within the rectangle remain selected.

NOTE!   *Selecting a group of objects is very useful when you want to apply the same changes to multiple objects at the same time. For example, you can select a group of text objects and then use the Font and Font Size controls to change these properties simultaneously on all of the selected objects.*

▶ To delete an object:

1. Select the object you want to delete.

       2. Click the **Delete** icon or press the **DELETE** key on your keyboard.

   A message box opens, prompting you to confirm the deletion.

3. Click **OK**.

▶ To change the size of an object:

1. Select the object you want to modify.

   Each side and corner of the object's selection box displays a small white square (called a 'handle').

       2. Click a handle and drag it in any direction to resize the object.

NOTE!   *Any portion of an image or text that extends beyond the object's borders will be cut off when displayed or printed. Ensure that the object is large enough to accommodate its contents.*

▶ To change the position of an object:

1. Place the cursor over an object until the mouse pointer becomes a four-way arrow.

       note!   *For a Label Object, place the cursor over the edge of the object (but NOT over a handle) to make the mouse pointer become a four-way arrow.*

       2. Click and drag the object in any direction to reposition the entire object.

3. If two or more objects overlap, specify which object is on top and which is on the bottom using the **Bring to Front** and **Send to Back** icons.

   • select the object you want to bring forward or send back and click the appropriate icon.

> *note!* *This feature can be especially useful when overlapping images to create an artistic effect.*

To align a group of objects:

1. Select the group of objects that you want to align as described above.

   2. Click one of the **Align** icons.

The selected objects are aligned according to the selected aspect. For example, if you click the **Align Lefts** icon, all of the selected objects will be moved to the left so that their left edges line up with the edge of the left-most object.

▶ To change an object's text formatting:

1. Select the text object(s) that you want to modify.

   • If you are working with a single Label Object, you can use the cursor to highlight and format just a portion of the label's text.

   2. Use the tool bar drop-down lists to select a font and point size for the text.

3. Click the **Outside Border** icon to create a black border around the text.

   • use the object handles to change the border size dimensions. Click the icon again to remove the border.

   4. Click the **Font Color** icon to change the text to the currently selected color.

   • click the drop-down list to select a new color from the Color window, then click **OK**.

5. Click the **Bold**, **Italic** and **Underline** icons to apply these effects to the text.

   • click the icons again to remove the effect.

6. Click the **Align Left**, **Center** and **Align Right** icons to change the justification of the text within the boundaries of the text object.

Printing a Draft of the Report

You can get a sense of what your report design will look like when printed, and make changes accordingly.

▶ To print the report from Report Editor:

1. From the Report Editor page, click the **Print** tool bar icon.

   A standard Windows Print dialog box opens.

   2. Choose any additional report options (e.g., number of copies, destination printer, etc.), then click **OK** to print the report.

NOTE! *Reports printed directly from the Report Editor will not show any property information, images, or other data. Merge codes and image placeholders will print exactly as shown on screen.*

▶ To complete the report:

1. When you are satisfied with the report, click the **Save** icon.

   2. Enter the **Report Name** and the optional **Report Description**.

> **note!** *If this page is just for use with CMAs, select **Make this report only available for CMAs**.*

3. Click **OK**.

    4. Click **Close** to return to the Report Manager page.

Running Business & Statistical Reports

Reports help you track clients and manage your business. Statistical reports include information such as office inventory, market share and penetration, and home sales.

▶ To run a statistical report:

1. From the main menu, click, **CMA & Reports > Business Reports**.

   The Business Reports Criteria page opens.

   While more limited in some ways, this page is similar to the listing Search Criteria page.

       2. Click the **Statistical report** drop-down list and choose the type of report to create.

3. To build a more advanced search or change the search operator(s), click the **Show Advanced Operators** button in the footer bar.

   The Boolean operator drop-down lists are displayed.

4. Build your search query by entering the appropriate criteria in the fields.

> **NOTE!** *The available search criteria fields are different for each statistical report type.*

5. Click the **Search** button.

   A dialog box is displayed, showing the number of records that match your search criteria.

> **NOTE!** *The larger the number of matching records, the longer the statistical report will take to generate.*

6. Click **OK**; or click the **Reports** tab.

   The Reports page is displayed.

7. To browse through multiple pages, click the arrow buttons at the bottom left of the scrollable portion of the window.

8. To view a printable report of the search criteria used to generate this statistical report, click the **Search Criteria Report** link.

9. To return to the Search Criteria page, click the **Back to Criteria** link.

       10. To print the statistical report, click **Print Report**.

A standard Windows Print dialog opens.