



StateFleet
Government Services

StateFleet Online

Advanced Features

User Guide

Cathy Moore | Client Liaison and Marketing
StateFleet
NSW Department of **Finance & Services**
T 02 9372 7749
F 02 9372 7722
E cathy.moore@services.nsw.gov.au



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Advanced Report Features

In addition to the report features included in the Fleet Officer and Fleet Manager User Guides, there are a large number of customisation features available in the new StateFleet Online system.

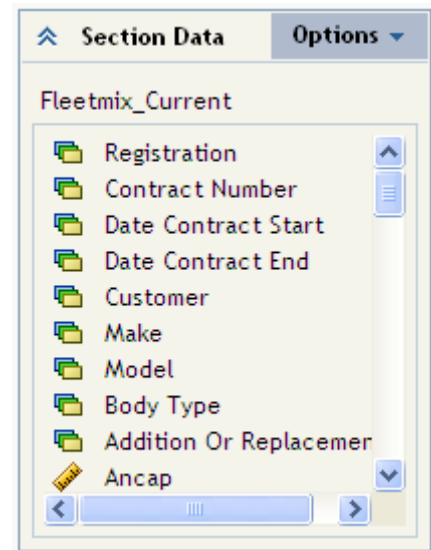
Adding Additional Fields

If a field you require is not in the available fields under Section Data, you can search for additional fields from the base table using the Select Data option.

To access this area

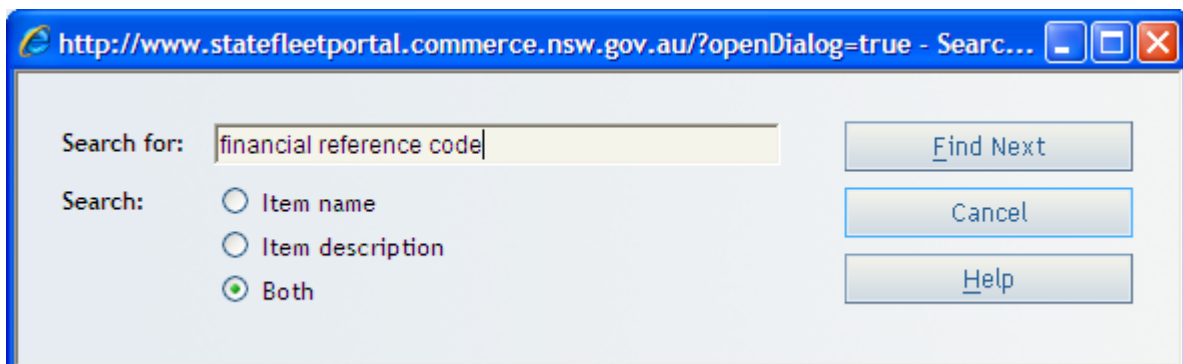
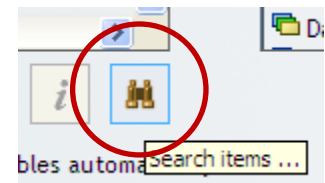
1. In the Section Data box, click Options
2. From the dropdown that appears click Select Data

This will bring up a separate window where additional fields can be found. You can either expand the folders and look through the list of fields to find the field you require or use the search function at the bottom of the screen.



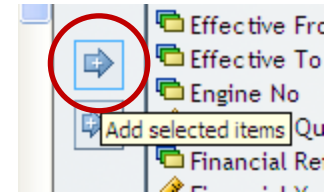
To Search for an additional field

1. Click on the binoculars icon at the bottom of the screen.
2. Type the keywords you would like to look for in the box that appears, for example “financial reference code”. You can also choose to search Item Name, Item Description or Both.
3. Press Find Next.
4. Close the search dialogue box by using the red X in the corner or pressing cancel.





Once you have found the field/s you would like to add, and they are highlighted press the Add Selected Items button between the Available data items box and the Selected data items box.



The field should now appear in the Selected data items box on the right.

If you would like the field to appear in the Section Data box and not in the report, untick the “Add new data items to existing tables automatically” check box at the bottom of the screen. This will add the report to the Section Data box and not as a column in the report.

When you are satisfied with your field selection Press OK.

Report Edit Screen

When viewing a report online, as well as the standard view functions available such as adding and removing columns, exporting etc. you have the ability to manipulate how a report is displayed, filtered and broken up when you access the report Edit screen. This is the same area that you can access to add or remove group breaks.



To access the edit screen, select the Edit Tab at the top of the report

Removing Report Sections

If you are editing a grouped report and saving for future use in My Folder, you can remove the additional reports from the group, so that your saved version will only have the section you require. Remember, this will not affect the default report accessed from the other sections of the portal.

To Remove a Report Section

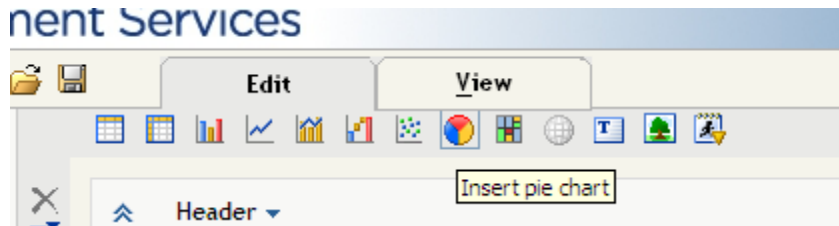
1. From the edit screen, select the section you would like to remove from the Table of Contents dropdown box
2. Click the Table of Contents Options
3. Select Delete Section



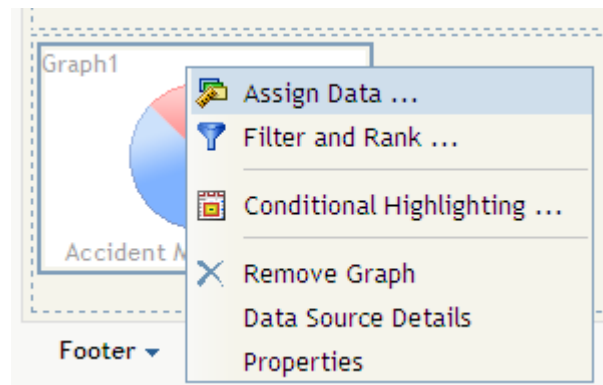
Adding Graphs

If you would like to have a summary graph in your report one can be added. As an example we will create a pie chart on a Fleet List of vehicles by Category Group.

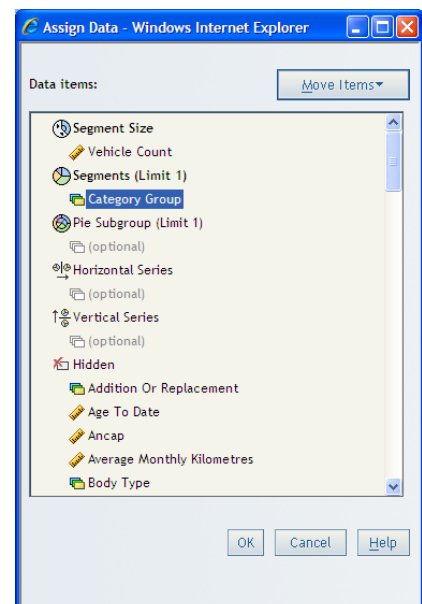
1. Open the Select Data screen in Section Data
2. Add the field Vehicle Count field (if you are unsure on how to do this, please see [adding additional fields](#))
3. Open the Edit screen. You will notice at the top of the report area below the edit and view tabs is a line of icons for the different objects that can be inserted into a report. These options can also be accessed via the Insert menu option



4. Click on the Pie Chart. A new row in the report area and a pie chart object should now appear in the report section
5. Now right click the graph and select Assign Data



6. Drag the Vehicle Count field to Segment Size and remove Age to Date
7. Drag Category Group into Segments
8. Press Ok





Note: You will note each field has an icon before the field name. This indicates the field type.



<< This indicates a measure



<< This indicates a category

Only certain field types can be used in some areas of a graph, for example the segment size can only be a measure and the segment can only be a category. The allowable field type is shown when the section is empty.

If you go back to the view screen, you will now have a pie chart displaying vehicles by Category Group.

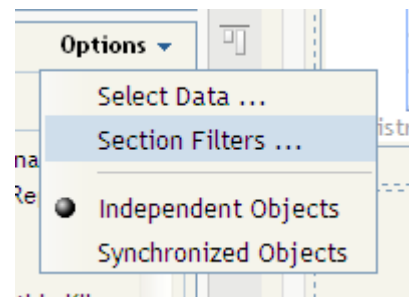
You can insert different graph types or have them display differently by using the subgroups, horizontal series or vertical series sections of the assign data options.

Report Filters

In the Edit screen, you can also remove, manage and create your own filters.

To add or remove a Report Filter

1. From the edit screen, click options in Section Data
2. Select Section Filters
3. In the window that appears, untick the filter you do not want applied or tick the filter you would like applied
4. Click OK

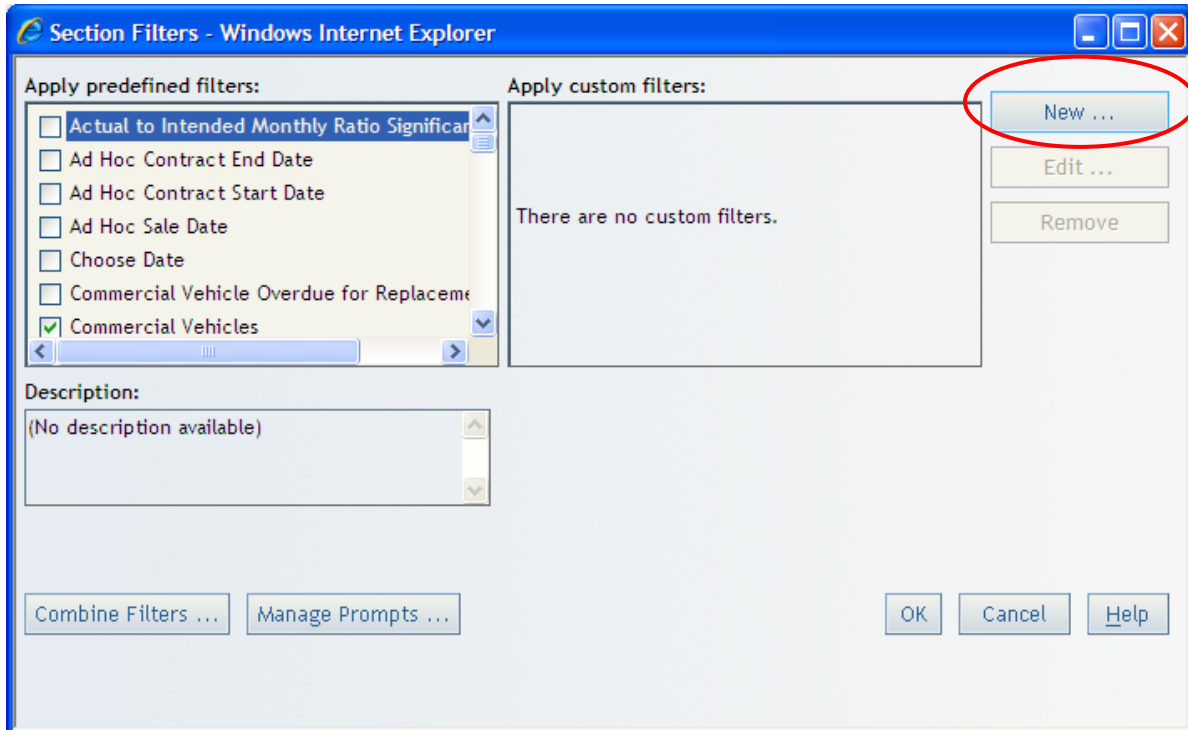


To Create or Edit a Report Filter

You can create your own custom filters if the filters in the report you are working on do not meet your needs. In the example below we will add a user prompt filter for category group.



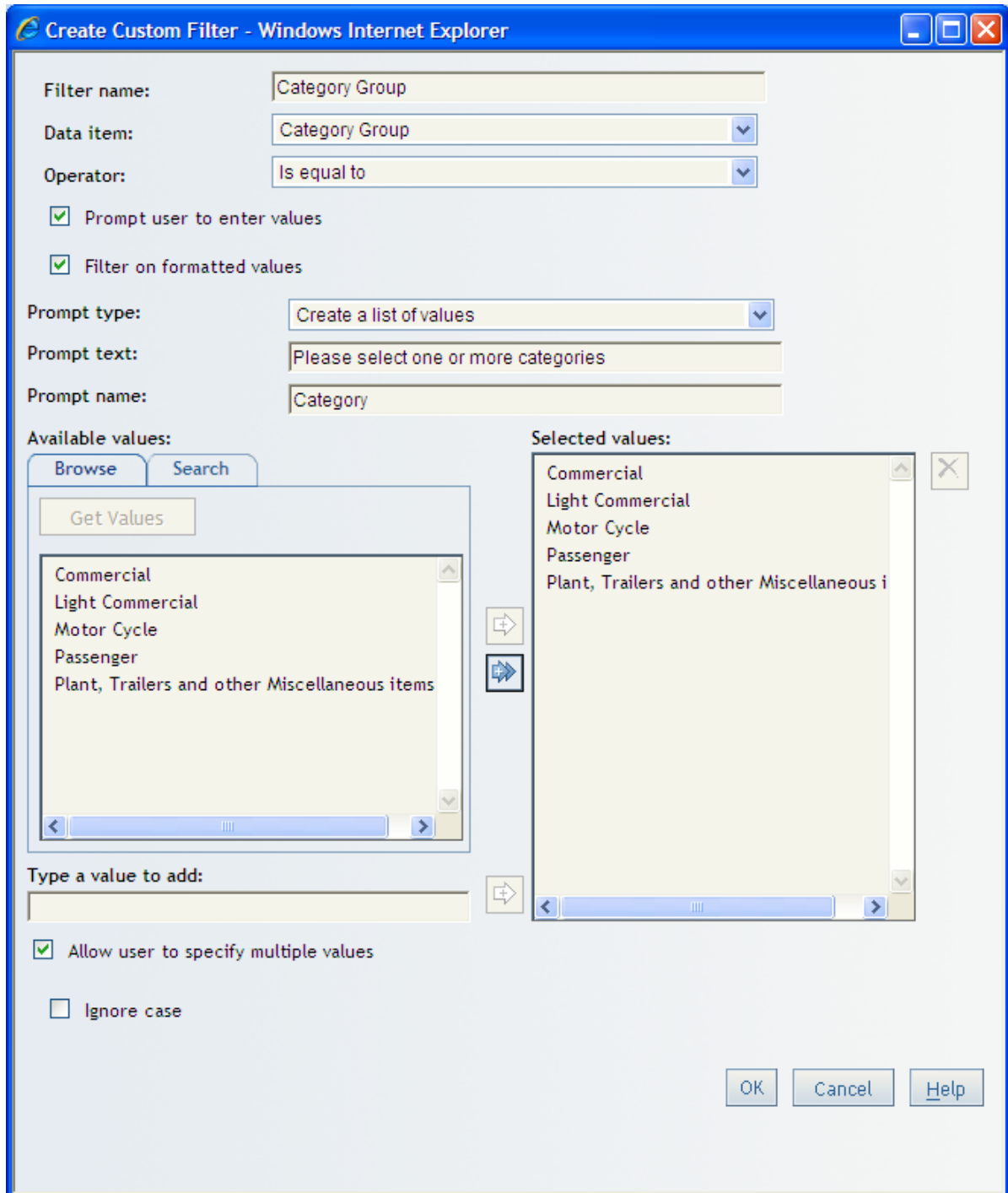
1. In the Section Filters dialog box (Edit Screen > Section Data Options > Section Filters) click New



2. Name your Filter something that you will recognise should you wish to remove it in the future.
3. From the Data Item dropdown, select Category Group and in this case leave the Operator as 'Equal To' (for a date filter, you may want to use "is between values", for a number filter you may want to use "is greater than" or "is less than" etc.)
4. If you would like to be prompted to select a category when the report opens, tick 'Prompt user to enter values'. If you would like to create a list of values to choose from tick 'Filter on formatted values' (note this option is not available on all fields). For this example we will use both of these options
5. As we are creating a list of values, leave Prompt Type as Create a List of Values
6. In Prompt text, enter something meaningful, such as "Please select Category"
7. In Prompt name, enter a name for the prompt such as "Category"
8. Click Get Values
9. Add the items you would like to appear in the list by selecting them and using the arrow to add them to the Selected Values box (similar to how you would add and additional field)



10. If you only want the prompt to allow you to select one value from the list, untick Allow user to specify multiple values
11. Press OK. The filter you created will now appear in the Section Filters window under custom filters.



12. If you are satisfied with the filters press OK



If you go back to the view screen, you will now see a prompt asking you to select a category

Please answer the prompts below and click the View Report button to continue.

Fleet List

* Category
Please select one or more categories

Available:

- Commercial
- Light Commercial
- Motor Cycle
- Passenger
- Plant, Trailers and other Miscellan

Selected:

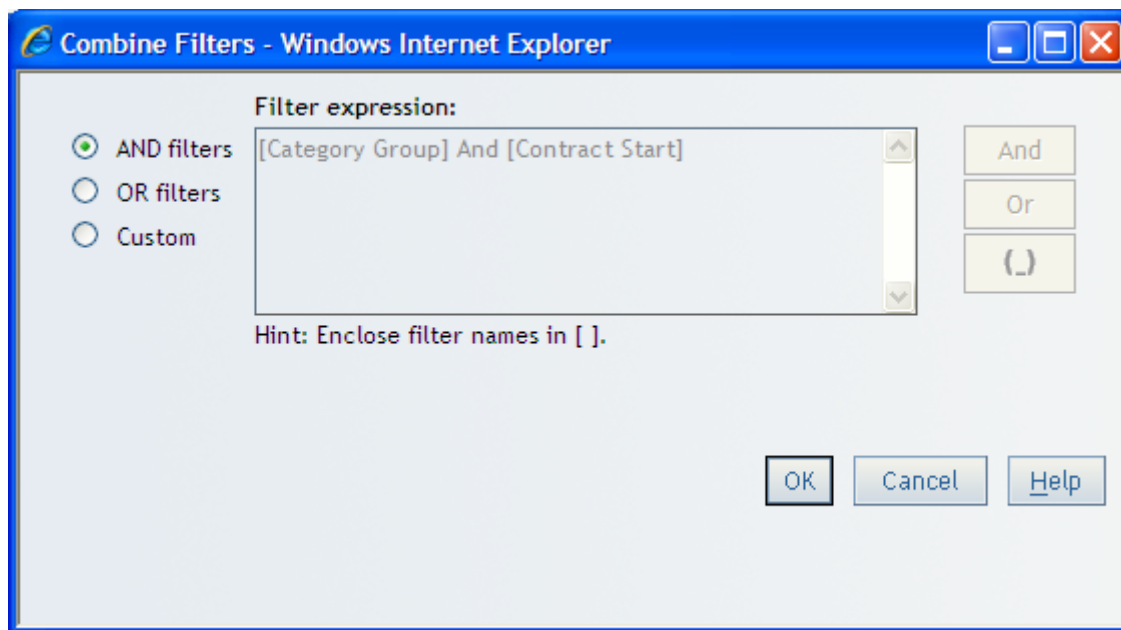
- Commercial

Combined Filters

If you have more than one filter applied to a report, you need to make sure you have them working in the right way.

For example, if you are filtering to passenger vehicles and filtering for vehicles with a contract start after 1/04/2011, you should be using the AND operator to tell the system you want both of these filters applied simultaneously.

If you were filtering for vehicles sold after 31/03/2011 or active you can filter Date Sold is greater than 31/03/2011 or Date Sold is missing. This will tell the system you want vehicles sold after the 31/03/2011 or not yet sold (date sold is missing).



To Combine Filters

1. In the Section Filters window (Edit Screen > Section Data Options > Section Filters) press Combine Filters.
2. Select the type of operator you would like to use. The default is AND. If you would like to use a combination of ANDS and ORS select custom and in the filter expression box insert the AND and OR where you would like them and brackets if required.
3. Press OK



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StateFleet
McKell Building
2-24 Rawson Place
Sydney NSW 2000
T: 02 9372 7711
F: 02 9372 7772
www.statefleet.nsw.gov.au