

Exercise: Display WO Costs by Job Cost Type

Suppose you need total costs by job type for each work order in a pivot table with these features:

- Prompts to run the report by any crew, building, and maintenance type (or all)
- Costs categorized by job type (labor, materials, and all other)
- Work orders grouped by building.

The crosstab report will use the Cost Recovery Star and the data elements below:

- Filters – Work Order Crew AND Maintenance Type AND Building Name
- Pivot Table Elements – building, work order, job cost type
- Fact – transaction amount.

Insert filters and elements

1. From the Insert Data menu, expand AdHoc 2.0 View > Cost Recovery Star.
2. Expand the Work Order dimension.
 - a. Right-click Work Order Crew and click *Filter for report*.
 - b. Click *Prompt every time the report runs*.
 - c. Click OK.
 - d. Right-click Maintenance Type and click *Filter for report*.
 - e. Click *Prompt every time the report runs*.
 - f. Confirm the logic is AND, and click Apply > OK.
 - g. Close the dimension.
3. Expand the Location dimension.
 - a. Double-click Building Name.
 - b. On the report canvas, right-click the Building Name column heading and click *Filter*.
 - c. Click *Prompt every time the report runs*.
 - d. Confirm the logic is AND, and click Apply > OK.
 - e. Close the dimension.
4. Expand the Work Order dimension.
 - a. Double-click the Work Order Number element.
 - b. Close the dimension.
5. Expand the Fact – Cost Recovery table.
 - a. Double-click Job Cost Type.

Insert the measure

6. Also inside the Fact – Cost Recovery table.
 - a. Double-click Transaction Amount. Note: this fact will occupy the center of the pivot table.
 - b. Close the fact table.

Add finishing touches

7. Add a sort to columns.
 - a. Select Building Name and click the sort icon.
 - b. Select Work Order Number and click the sort icon.

8. Create the pivot layout.
 - a. Select Job Cost Type. In general, the pivot should be an element with relatively few values.
 - b. Click the Pivot icon.
9. Give the report a title.
 - a. Double-click Title and Subtitle.
 - b. Type the title "WO Total Cost by Job Cost Type."
 - c. Type the subtitle "Materials, Labor, and Misc. Costs" and click OK.

Save and run the report

10. Click Save.
 - a. Give the report a file name like "WO Total Cost By Type."
 - b. Select a location in "My Folders."
 - c. Click OK.
11. Click Run.
12. Respond to the prompts you requested.
 - a. In Work Order Crew, click Select All.
 - b. In Maintenance Type, click Select All.
 - c. In Building Name, click Select All.
 - d. Click OK. Result: the report runs with all data.

Discussion Questions

- Would you prefer a report with sections? How would you do that?

- Would you like to add elements to the report? How would you do that?

- Or would you prefer to create a similar report with different elements? How would you do that?

- Where would you save this report in order to collaborate with a colleague?

- Where would you save this report in order to publish it for others to run themselves?