AssetW**O**RKS

Ad Hoc Reporting

User Interface Guide

Version 24.x Last Modified: 24.0 | March 2024 © 2024 AssetWorks Inc., its subsidiaries and affiliates. All rights reserved.

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Technical Support

AssetWorks provides several ways to connect with the Customer Support team. Be prepared to provide detailed information to the representative. If you are reporting an issue by email, include screen shots of your problem. This will provide the Customer Support representative with the information needed to respond quickly and effectively.

Customer Support is available Monday through Friday, 7:00 a.m. to 7:00 p.m., Eastern Time.

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Website: <u>Community.AssetWorks.com</u>

The support website can be used to open issues, subscribe to user groups, and download documentation, as well as to access the latest AssetWorks news. For secure access to the website, contact Customer Support by calling the number above.

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Contents

Ov	verview	4
Se	tup and Configuration:	5
	Settings tab	
Re	port Designer	8
1.	Data Sources	9
	Multiple Data Sources	
2.	Design	15
	View Data Source Fields	
	Add Report Filters	16
	Building Complex Filter Logic	17
	Apply Cross Filtering	17
	Manage Report Parts	18
	Field Properties	19
	Data Source	20
	Data Formatting	20
	Header Formatting	23
3.	Format	25
4.	Exporting	26
5.	Access	26
6.	Report Viewer	27
7.	Grid – Report Part	28
8.	Chart – Report Part	29
9.	Form – Report Part	
10.	. Gauge – Report Part	31
Da	shboard Designer	32
	Edit Dashboard	35
	Presentation Mode	

Configure Sharing/Access	
Subscriptions/Scheduling	
Other Options	37
M5 Application Frames	
Role Maintenance	
Application User Maintenance	
Ad Hoc Group Maintenance	
Ad Hoc Query Admin	41
Additional Resources	43
Updates	44

Overview

The Ad Hoc Reporting tool allows users to create and execute their own customized reports within the M5 application. It is available as an add-on license.

The Ad Hoc Reporting tool must be licensed and installed as part of the M5 application. There is specific Ad Hoc Reporting application user security that must be configured prior to using this feature.

Ad Hoc enables you to access views of the M5 data to quickly transform raw data into useful and readily understood information.

You can:

- Extract the information you need from one or more related views.
- Format data into reports, charts, pivots, and gauges.
- View the resulting report and then print it.
- Export reports in several formats, including Microsoft Word, Microsoft Excel, and Adobe PDF.
- Implement custom layout reports through Forms.

Setup and Configuration:

Please see the *M5* Ad Hoc Izenda Install Guide for more information regarding setup and configuration for the Ad Hoc module.

If this is your first time using Ad Hoc after the install OR you have just installed a new M5 patch update, please see the <u>Ad Hoc Query Admin</u> section of this document for synchronization instructions.

Ad Hoc permissions and access levels are configured using the following frames within the application:

- Role Maintenance
- Application User Maintenance
- Ad Hoc Group Maintenance

Ad Hoc maintenance and upkeep (system admin level) activities are carried out on the following frames within the application:

- Ad Hoc Object Maintenance
- Ad Hoc Query Admin
- Legacy Ad Hoc Query

Settings tab

■ Reports +	+ Settings		- 4 9
X Others			Save Cancel
	Name	Value	
	Sort Column Name		C
	Trim Time In Joins		C
	Timezone for Data Offset	0	C
	Timezone for Timestamp Offset 0	0	C
	Convert Null to Empty String		C
	Show Schema Name	0	C
	Show Introduction Text	0	C
	Send to Disk Path		C
		 Same field of the same data object from the same DB schema 	C
		 Same field name regardless of DB schema or connection string 	
		O Same alias name regardless of DB schema or connection string	
	Hide report header and footer by default	0	C

Field	Description
Sort Column Name	If true (selected), then sort by position in database. If false (cleared), then sort in alphabetical order.
Trim Time in Joins	Sets whether joins using Date Time fields will use the time portion of the field.
Time Zone for Data Offset	Set the value indicating time zone offset for database data in Report Designer/viewer/dashboard for hours entered.
Convert Null to Empty String	If selected, system displays blank for any field containing NULL and blank for any field containing blank.
Show Schema Name	Select to show schema name together with data source name.
Show Introduction Text	Select to show introduction text in Report Designer on data source tab.

Field	Description
Send to Disk Path	Sets the path where files will be saved for any scheduled instances with a Send to Disk location specified.
Determine common filter for the same field based on	Choose how the system should consider whether different filters are to filter the same field or not so that they are eligible to be considered a common filter on the Dashboard tab.
Hide report header and footer by default	Select to hide report header and footer by default in Report Designer and Report Viewer.

Report Designer

The Ad Hoc Report Designer tab is accessed by searching for the *Ad Hoc Query* frame in M5 and navigating to that frame. Select the **Reports** tab to access the designer.

The report designer allows you to create, modify reports, and preview reports.

- There are two tabs at the top of the Ad Hoc Query page: **Reports** and **Dashboards**.
- To view a list of available, previously created reports, select the **Reports** tab.
- To create a new report, select the + icon on the **Reports** tab.

	🗷 Reports 💽 💭 Dashboards 🕂		- 4 0
«	All v Search Q	Sort by Report Name	
REPORTS TEMPLATES	LOCAL CATEGORIES		•
ALL REPORTS	SHARON		
Local Categories 👻	Sharon Test 1 Trying out Adhoo 7	Created By: Sharon Henry Last Edited: 12/23/2019	C
Sharon d	sgh - test 2	Created By: Sharon Henry Last Edited: 10/16/2019	0
Uncategorized	TEST REP 987 - TEST SUB 987		
	Mac tester 2	Created By: Mac Breuer Last Edited: 09/17/2019	0
	PETES REPORT	Created By: Peter Corbett Last Edited: 09/12/2019	c
	PETES REPORT	Created By: Peter Corbett Last Edited: 09/12/2019	0
	PETES REPORT	Created By: Peter Corbett Last Edited: 09/12/2019	c
	tester mac report	Created By: Mac Breuer Last Edited: 09/17/2019	c
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1. Data Sources

The Report Designer/Data Source page allows you to:

- Search for, view, and select data sources for your report.
- Set up and validates relationships between your data sources.

	🖩 Reports 🕂 🖳 🖳 Das	shboards		
«	Distinct			
Data Source	Search		Example Report Name & Preview Records	
🕑 Design	AVAILABILITY	•	Q	
	BILLING	• 0		
	BILL_CODES	• •	✓ Filter	
Exporting	BILL_LEAS_SUMM	• •		
	BILL_NLEA_SUMM	• •	Please select a data source from the middle panel to begin creating your report	
	CATEGORY_TREND_C	• •		
	COMP_MAIN	• •		
	COMP_STATUS_HIST	• • •		
	DASHPAGE	•	Join Alias Join Type Operator Data Object Join Field Foreign Data Object	Field
	DEPT_MAIN	• •	No record found.	
	DEPT_MAIN_2	• •		
	FFX_VIEW_BILLSUM	• •		
	FFX_VIEW_UNIT_VOC2	• •		
	FFX_VIEW_VOC2	•		
	FFX_VIEW_VOC2_DISP1	• •		
	FFX_VIEW_VOC2_DISP2	•		
	FFX VIEW VOC2 JOB	• •		

- Available tables and views display in the middle panel next to the left side menu.
- You can use the search box to quickly filter results.



- To select a data source, select the green checkbox.
 - Existing relationships between selected data sources are automatically added to the relationship list in the Content Panel.
- To unselect a data source, clear the green checkbox.
 - Relationships between unselected data sources are automatically removed from the relationship list in the Content Panel.

	Reports	+
«	Distinct	
Data Source	unit_no Q	Example Report Name 🖉
🗹 Design	🗊 AVAILABILITY 🔹 🗹	Q
ត្រ) Format	I <u>UNIT_NO</u> ∎ BILLING ▼ ♥	▼ Filter
Exporting	I UNIT_NO	
Access	BILL_LEAS_SUMM	
	I <u>UNIT_NO</u> ■ BILL_NLEA_SUMM ▼ □	All v Search Q
	I UNIT_NO	Join Alias Join Type Operator Data Object Join Field
	FFX_VIEW_UNIT_VOC2	No record found.
	⊥ <mark>UNIT_NO</mark>	
	FFX_VIEW_VOC2 •	
	I UNIT_NO	
	FFX_VIEW_VOC2_JOB •	

• You can choose to set the report as **Distinct** by selecting the checkbox on top of the middle panel. If selected, this will force the report to return unique values only.

• If you want the report to return duplicate values,	leave it clear.
--	-----------------

	🖩 Reports 🕂 🖳 Dash	boards	+
«	Distinct		
Data Source	unit_no	Q	Example Report Name 🖉
🗹 Design		• 🗹	Q
p Format	⊥ <mark>UNIT_NO</mark> ∎ BILLING	• 🕑	✓ Filter
Exporting	I UNIT_NO		
F. Access	BILL_LEAS_SUMM	• 0	
	I UNIT_NO	• 0	All V Search Q
	I UNIT_NO		Join Alias Join Type Operator Data Object Join Field
	FFX_VIEW_UNIT_VOC2	• 🗆	No record found.
	⊥ <mark>UNIT_NO</mark>		
	FFX_VIEW_VOC2	• □	
	I UNIT_NO		
	FFX_VIEW_VOC2_JOB	• 🗆	
Copyright 2016 - 2020 Izenda, Inc.			

• Select the amount of preview records from the dropdown at the top of the screen.

		Export -	pdate Result Save C	Cancel Report Viewer
Example Report Name 🖉		Preview Records	10	- <
Ŷ			10 1 10	Filter P
✓ Filter			1000 10000 All	Filter Properties
All - Search	2		Add Relationship	Validate Syntax
Join Alias Join Type Op	erator Data Object Join Field	Foreign Data Objec	t Field	Action
No record found.				

• To save the report, select the **Save** button at the top of the screen.

If the report has more than one table or views, you will have to first edit and define the relationships to join them together. See the following page for information on join relationships for reports with more than one table or view.

						Export •	Jpdate Result	Save	Cancel	Report V	iewer
Example Report Name 🖉				Save				×		•	<
0				Template Name	Report 01						Filter Properties
✓ Filter				Save As	Templates			*			pertie
				Category	Select			-			ŵ
				Sub-category	Select			*			
All 👻 Search							ОК	Cancel	Validat		
Join Alias Jo	oin Type	Operator	Data Object	Join Field		Foreign Data Obje	ct Field		Ac	tion	
No record found.											
No record found.											

- Give the report a unique name. The report is saved as a **Template** initially. After you define any field on the **Design Page**, the **Report** option is then available.
- Select a Category and Sub-Category if necessary. You can also create new categories and sub-categories on the fly by entering new values in the fields.

The report name must be unique. You cannot save the report with a duplicate name.

						Export - Updat	e Result Save	Cancel Report	View
Example Report Name	Ø					Preview Records 10		•	
0									
∨ Filter									
									0
All 🔻 Search		Q		000			Add Relationship	Validate Syntax	Ĺ.
Join Alias	Join Type	Operator	Data Object	Join Field		Foreign Data Object	Field	Action	
	Inner	•	•	•	= (Field) 📼	•	-	+ 🗆 ×	
	Inner Left			•	= (Field) -	•	•	+ 🗆 ×	
	Right								
	Cross								
	Full								

Multiple Data Sources

- When selecting multiple data sources, you must define their relationships to join them together.
- The options are:
 - Inner (Direct) Join: Selects rows from two tables such that the value in one column of the first table also appears in a column of the second table.
 - Left (First Exists) Join: The Left Outer Join known also as Left Join returns all rows from the left table in the Left Outer Join clause, no matter if the joined columns match. A field in a result row will be null if the corresponding input table did not contain a matching row.
 - **Right Join:** The Right Outer Join known also as Right Join returns all rows from the right table in the Right Outer Join clause, no matter if the joined columns match. A field in a result row will be null if the corresponding input table did not contain a matching row.
 - **Cross Join:** A cross join will return a result table where each row from the first table is combined with each row from the second table.
 - **Full Join:** The Full Outer Join known also as Full Join returns all rows from Both the Right Outer Join & Left Outer Join. A field in a result row will be null if the corresponding input table did not contain a matching row.
 - You can use the **Validate Syntax** button to make sure you have constructed a valid SQL statement before proceeding with the report.

						Export - Update	e Result Save	Cancel Report Vie
Example Report Name 🖉	>					Preview Records 10		•
Q								
✓ Filter								
				0 0 0				
All 🔻 Search		Q					Add Relationship	Validate Syntax
Join Alias	Join Type	Operator	Data Object	Join Field		Foreign Data Object	Field	Action
I VIEW_ALL_UNITS	Inner 👻		VIEW_ALL_U 👻	UNITID -	= (Field) -	VIEW_ALL_UNI	UnitID	- + 🛚 ×

- Action buttons:
 - The + icon is for adding **Key Joins**.
 - The **Copy** icon allows you to copy a relationship.
 - The **X** icon allows you to delete a relationship.
 - More information about the Report Designer/Data Sources can be found <u>here</u>.

2. Design

The Report Designer/Design page allows you to:

- View field properties.
- Add or edit calculated fields.
- Add or edit report parts.
- Add or edit data source fields.
- Define report filters.

View Data Source Fields

≡	+ Add Calculated Field		Export - Update Result Add Repo	ort Part Save - Cancel Report Viewer
=	unit Q	REPORT 01A	Preview Records 10 v	FIELD PROPERTIES
ß	🖨 Selected Data Source	✓ Filter □ Show Filters Under Report Description Cross Filtering ©	a Add Filter	
	🗊 Alias 1 🔹			Type View
6	I AlternateUnitNumber			Name Alias 1
Œ	DateUnitRequested			Field Name AlternateUnitNumber
5	# Replaces <mark>Unit</mark> ID	Filter Logic Example (1 OR 2) AND (3 OR 4)	Validate Syntax	Data Type Text P
	I Replaces <mark>Unit</mark> Number			operti
	# UNITID	• VReport Body Snap to Grid		
	I Unit Number			Repor
	# UnitRequestID			t Part
	⊥ <mark>Unit</mark> Status	latt Chart		Proper
	I UnitWONotes	TO CREATE A REPORT PART B Form		ties
	D VIEW_ALL_UNIT_HI •	SELECT A TYPE: On Gauge		
	≠ Unit ID	■ Grid		
Сору	right 2016 - 2020 Izenda, Inc.		l	

- Data sources display in the middle panel under Selected Data Source group.
- To expand a source's fields, select it. The fields display icons representing their data type.
- You can also search for fields in the **Search** box at the top of the panel.
- Selecting a field displays the Field Properties panel on the right side of the screen.

Add Report Filters

Plea	se press Update Result button after adjusting filt	er configurations to avoid data inc	onsistency. 😢		Export	Update Resu	It Add Report Part	Save 🕶	Cancel	Report V	Viewer
REPO	RT 01A 🖉					Preview Records	10			-	۲
1	ter Show Filters Under Report Description	Cross Filtering 🌣							A	ld Filter	Filter Properties
Filte	AccessoryCost AccessoryCostManual AcquisitionDate AcquisitionPrepCost AcquisitionPrep_CostManual AcquisitionSecondaryMeter AcquisitionMeter1			0.0.0					Validate	Syntax	Field Properties Report
		TO CREATE A REPORT PART SELECT A TYPE:	Lut Chart ≧ Form ♂ Gauge III Grid								Part Properties

- Select the Add Filter button.
- Select a field from the **Filter** dropdown menu.
 - Selected filters can be dragged and dropped in the *Filter* section to arrange them as needed.

Please press Update Result button after adjusting filter configurations to avoid data in	consistency. 🔇		Export - Upda	nte Result 🛛 Add Rep	ort Part Save	Cancel Rep	ort Viewer
REPORT 01A		Preview Records	10	-	FILTER PROPE	RTIES L	.ess ゝ
✓ Filter Show Filters Under Report Description Cross Filtering ✿				Add Filter	[1] InServiceD	ate	▼ Filte
1 InServiceDate					- Source		Filter Properties
					Туре	View	erties
					Name	Alias 1	Fie
Filter Logic Example (1 OR 2) AND (3 OR 4)				Validate Syntax	Filter Name	InServiceDate	▼ Id Pro
✓ Report Body	0 0 0				✓ Filter Operat	or	pertie
					Date & Time		•
					Equals (Date 8	& Time)	• leport
						(1)	Part P
	🔟 Chart					js	operti
TO CREATE A REPORT PART SELECT A TYPE:	E Form				Filter Alias	InServiceDate	
SELECI A HYPE:	∽ Gauge ⊞ Grid				Visible		
			_		Required		

- You can configure the **Filter Properties** in the panel on the right side of the screen by selecting the < icon and selecting the **Filter Properties** tab.
- You can define the Source, Operator, Settings, and Formatting.
- In the **Settings** section you can define the alias, visibility, and requirement settings for the filter.

Building Complex Filter Logic

In cases where a simple match-all condition is not enough, you can construct complex filter logic if necessary.

For example, you may have three filters:

- 1. MCC
- 2. Billing Code
- 3. Maintenance Location

And you want to return all units with an MCC of 01, a Billing Code of 12, and a Maintenance Location of FM.

You can enter those values and you will get all units that match the 01, 12, AND FM values.

But what if you want to view all units that have an MCC of 01 AND a Billing Code of 12 OR a Maintenance Location of FM?

You can use the complex filter logic to accomplish this task.

REPORT 01A	Preview Records
✓ Filter □ Show Filters Under Report Description Cross Filtering ♥	
1 MCC X 2 BillingCode X 3 MaintenanceLocation	- ×
Filter Logic 1 AND (2 or 3)	

• In the **Filter Logic** field, enter 1 AND (2 or 3). This will display results that match both the value in filter 1 AND that match either value in filters 2 or 3.

Apply Cross Filtering

Select the **Cross Filtering** button to apply cross filtering. This allows you to drill up and down in multiple report parts. For each action, the report filters related parts automatically.

This functionality is only available on charts or gauges that have more than one x-axis field defined or when you have multiple report parts.

Manage Report Parts

			Export -	Ipdate Result Add Re	port Part Save	e 🕶 🛛 Cancel 🛛 Rep	port Viewer
Image: Mode Report Description Crose Filtering (2) MaintenanceLocation MaintenanceLocatin MaintenanceLoca	REPORT 01A Ø	Preview Records	10	•	FIELD PROPER	TIES	>
1 MCC 2 BillingCode 3 MaintenanceLocation MaintenanceLocatin MaintenanceLocatin	✓ Filter Show Filters Under Report Description Cross Filtering			Add Filter			Filter
Name Alias 1 Filder Logic 1 AND (2 or 3) Validate Syntax Data Type Numeric	1 MCC V × 2 BillingCode V × 3 MaintenanceLocation	¥ ×			Туре	View	r Prope
Filter Logic 1 AND (2 or 3) Validate Syntax Validate Syntax VReport Body Snap to Grid					Name	Alias 1	arties
LML Chart TO CREATE A REPORT PART SELECT A TYPE: Gauge					Field Name	UNITID	Fie
LML Chart TO CREATE A REPORT PART SELECT A TYPE: Gauge	Filter Logic 1 AND (2 or 3)			Validate Syntax	Data Type	Numeric	ld Prop
	✓ Report Body Snap to Grid Mit Chart TO CREATE A REPORT PART B Form SELECT A TYPE: crA Gauge						rties Report Part Properties

- Built-in report parts include:
 - Chart
 - Form
 - Gauge
 - Grid
- You can add a new report part by selecting the type you want or selecting the + icon anywhere else in the report grid section.
- You can copy, delete and resize report parts using the report grid.

A more in-depth review of each report part is available through <u>Izenda's user documentation</u>.

Field Properties

REPORT 01A				Preview Recor	rds 10	•
✓ Filter 📄 Show Filte	ers Under Report Description	Cross Filtering 🌣				Add Filter
1 MCC	▼ × 2	Field Selection		×		
Filter Logic 1 AND (2	2 or 3)	Alias 1				Validate Syntax
∨ Report Body Sr	ap to Grid	 AccessoryCostManual AcquisitionDate AcquisitionPrep_CostManual 				
Description	Configuration	AcquisitionPrep_costManual AcquisitionPrepCost AcquisitionSecondaryMeter			review	
Columns	Test BillingCode × Mainte	 AcquistionMeter1 Act_Code_Description 				
Separators	Meter1Type X Meter	Active/DisposalStatus	0	K Cancel	. МСС Т02	Meter1Type M
	Dre		4000 011		T02	M

After a report part has been added to the grid (report body), you can edit your data source fields.

- Select a data source field inside the report body or you can expand the right-side panel and select the **Field Properties** tab and select *Grid* from the dropdown.
- A list of available fields displays in the dropdown next to it. The available fields display based on the values entered in the *Columns* box in the *Configuration* panel.

					Export -	Update Result Add Re	port Part Save ▼	Cancel Report	
REPORT 01A 🖉				Preview Records	3 10	•	FIELD PROPERTIES	Less	<u>s</u>
Filter 📄 Show Fi	Iters Under Report Description Cross Filtering 🌣					Add Filter	Grid 👻		
1 MCC	✓ × 2 BillingCode	₩ ×	3 MaintenanceLocatio	on 👻 X			▼ Data Source	BillingCode	
							▼ Data Formatting	MaintenanceLoc	
							◄ Header Formatting	MCC	
Filter Logic 1 AND	(2 or 3)					Validate Syntax	▼ Drill Down	Meter1Type	
❤ Report Body	Snap to Grid	0	0 0					Meter2Type OwnerDepartme	
	Configuration	Ð	C	Pre	view				
Description	Test	•	Grid						
Columns	BillingCode X MaintenanceLoca X MCC X		Test						
	Meter1Type X Meter2Type X OwnerDepartment X	+	BillingCode	MaintenanceLocat	MCC	Meter1Type			
Separators			AP99	CLKS	T02	М			
	Drag or Add a field	+	AP99	CLKS	T02	м			
		12	1000	01.100	Too	••			

- There are four sections in this panel
 - 1. Data Source
 - 2. Data Formatting
 - 3. Header Formatting
 - 4. Drill Down

Data Source

REPORT 01A					Export •		Report Part Save		ort Viewer
REPORT UTA				Preview Records	10	-	FIELD PROPER	TIES L	255
✓ Filter 📄 Show Filters	s Under Report Description Cross Filtering 🌣					Add Filter	Grid	▼ BillingCode	▼ Filter
									· Prop
							Туре		erties
							Name	Alias 1	7
Filter Logic Example (1 OR 2) AND (3 OR 4)					Validate Syntax	Field Name	BillingCode	ald Pro
✓ Report Body	o to Grid	0.0	0				Field Name Alia	s BillingCode	Field Properties
	Configuration	2	G	Previe	w		Data Type	Text	-
Title	-						Visible		Report
Description	Grid	*	Grid				► Data Format	ing	rt Part Propertie
· ·	Grid 1	\$	Grid 1 BillingCode				Header Form	atting	operti
Columns	BillingCode X	+	AP99				Drill Down		es .
		10	AP99						
Separators	Drag or Add a field	+	1000						

- In this section you can edit two fields:
 - 1. Field Name Alias
 - 2. Visibility check box

Data Formatting

					Export •	Update Result	Add Rep	oort Part Save	Cancel	Report V	/iev
REPORT 01A				Preview Records	10		-	FIELD PROPERT	TIES	Less	
✓ Filter 📄 Show Filters U	Jnder Report Description Cross Filtering 🌣					a Ad	dd Filter	Grid	▼ Count (Billin	ng 💌]
								▼ Data Formatti	ng		L
								Function	Count	~	L
								Format	Count		ŀ
Filter Logic Example (1 0	DR 2) AND (3 OR 4)					Validate	Syntax	Width	Count Distinct		
✓ Report Body		0.0	9 0					Font	Group		L
• Report Body Shap t	o Gria								Maximum		L
	Configuration	Ð	•	Previe	N				Minimum		l
Title	Grid	\$						Alignment		•	L
	Grid 1	•	Grid Grid 1								L
Columns		_ *	Count (BillingCode)					Word Wrap	2 2		Ľ
Columns	Count (BillingCode)	+	416986					Sort	41		L
		18	410500					Color	A 🜢		L
Separators	Drag or Add a field	+						Alternative Text	¢		

- In this section you can:
 - Apply a function to the field.
 - Format the display.
 - Choose font size, text effects, text color.
 - Set alignment.
 - Sort (sorting).
 - Subtotal and grand total settings.

Functions:

Name	Description
	No function used.
Average	Averages the values in a column.
Count	Counts the number of values in a column.
Count Distinct	Counts the number of distinct values in a column.
Maximum	Takes Maximum value of a field.
Minimum	Takes Minimum value of a field.
Sum	Sums the values in a column.
Sum Distinct	Sums the rows with distinct values in a column.
Group	Groups field values together for aggregating.
Group (Day)	23; day of month .
Group (Month)	3; instead of March.
Group (Year)	2019
Group (Month Name)	July
Group (Date)	7/4/2019
Group (Day of Week)	Sun or Mon
Group (Year & Month)	2019 -07
Group (Year & MN)	2019 - Jul

Name	Description
Group (Week)	Jul 01 – Jul 07 (Sunday to Saturday of Week).
Group (Year & Quarter)	2019–Q3
Days Old	342 (Number of Days from Today's Date).
Sum (Days Old)	782 (Sums the Number of Days from Todays Date).

Numeric Formats

Name	Description
	Displays the number as it is stored in the database.
0,000	Displays as a whole number.
0,000.00	Displays with two decimal places.
\$0.00	Displays as currency with two decimal place.
\$/100	Displays the Number / 100 In currency format.
0.0	Displays with one decimal place.
0.00	Displays with two decimal places.
0.000	Displays with three decimal places.
0%	Displays the number as a percentage.
% of Group (with rounding)	Same as % of Group but rounds to closest tenth (ex. 1.11547% would be 1.1%).
% of Group	Calculates the percentage of the row value to the entire group of values.
Gauge	Shows value in a Linear Gauge instead of a numerical value.
Gauge (variable)	Shows values in a Linear Gauge which changes format due to values.
Dash Gauge	Shows values in a Linear Gauge which changes format due to values.

Date/Time Formats

Name	Description
	Displays the date as it exists in the database.
Short Date	Displays date using the mm/dd/yyyy format.
Long Date	Displays the day of the week, month, numeric day, and the year.
Short Time	Displays time as hh:mm AM/PM.
Long Time	Displays time as hh:mm:ss AM/PM.
Full (short)	Displays the Long Date format, followed by the Short Time format.
Full (long)	Displays the Long Date format, followed by the Long Time format.
D&T (short)	Displays the Short Date format, followed by the Short Time format.
D&T (long)	Displays the Short Date format, followed by the Long Time format.

Header Formatting

					Export - Up	odate Result 📃 Add Rep	ort Part Save	Cancel Report	Viewer
REPORT 01A				Preview Rec	ords 10	•	FIELD PROPERT	TIES Les	<u>s</u> >
✓ Filter	s Under Report Description Cross Filtering 🌣					Add Filter	Grid	▼ ChangeDate ▼	Filte
							Data Source		r Prop
							Data Formatting	ng	erties
								atting	7
Filter Logic Example (1 OR 2) AND (3 OR 4)					Validate Syntax	Font	· · · · · · · ·	Field Properties
✓ Report Body Snap	- t- C-id	0 (0 0					B / U	pertie
	p to Ghd						Alignment	****	ö
Grid				N	umber of Records	23 9 ×			Repo
Title	Grid	\$					Color	A 🜢	nt Part
Description	Grid 1	۵	Grid Grid 1				Word Wrap		Prop
Columns	BillingCode × BookValue × ChangeDate ×		BillingCode	BookValue	ChangeDate		Column Group		rties
		+	AP99	0	2019-09-09T12:31:		· · ·		
Separators			AP99	0	2019-09-09T12:31:		 Drill Down 		
	Drag or Add a field	+	*000	^	0010 00 00710 01				

• You can format header settings, such as font, font size, alignment, color, word wrap, and column group.

Drill Down

leports 🕂 🖳 Dashboards 🕂					
	Subreport Settings		×	Update Result Add Rep	oort Part Save Cancel Report Viewer
REPORT 01A 🖉	Reports		۹×	-	FIELD PROPERTIES
V Filter 📋 Show Filters Under Report Description Cross Filtering 🕻	Subreport's filters inh	erit filters from current report		Add Filter	Grid
	Field in Current Report	Field in Subreport			Data Source
	No record found.				Data Formatting
					Header Formatting
Filter Logic Example (1 OR 2) AND (3 OR 4)				Validate Syntax	✓ Drill Down Properties Sub Report ✿
					Sub Report 🌣
• V Report Body Snap to Grid					33
Grid				2 S S X	Rep
Title Grid	Style Link (New Window)		•		ort Part
Description Grid 1	You would like to view this setting as:				Prop
Columns BillingCode × BookValue × ChangeD	®Link ©Icon ଡि. ▼			e :31:	rtios
Separators Drag or Add a field		Add Field Mapping OK C	ancel	:31:	

• The *Drill Down* section allows you to configure sub reports.

More information on the Report Designer/Designer section can be found here.

3. Format

≡	Report Formatting -		Export - Update Result Save -	Cancel Report	Viewer
≡ ■	Report Header & Footer • Image	REPORT 01A	Preview Records 10	•	<
	Text Date Time Page Number Horizontal Rule Vertical Rule	Filter Show Filters Under Report Description Cross Filtering		Add Filter	Filter Properties
•	Report Title & Description	Filter Logic Example (1 OR 2) AND (3 OR 4)		Validate Syntax	Field Prope
		✓ Report Header		Add Item	rties
		× Loop Image	Report Name	×	Report Part Prop
			Report Generated × Current Date Time	×	rties
			User X Current User Name	×	Forma
			Tenant × Tenant Name	×	It Prope
Сору	ight 2016 - 2020 Izenda, Inc.				

The <u>Report Designer/Format</u> page allows you to:

- Format the layout for the report's header and footer.
- Enter a title and description.
- Enter additional report items:
 - Image (URL-based only)
 - Text
 - Date/Time
 - Page Number
 - Horizontal Rule
 - Vertical Rule

4. Exporting

The Exporting page allows you to view a generated preview of the report as well as export the query execution SQL to a .txt file.

5. Access

		Export + S	ave 🕶	Cancel	Repo	rt Viewe
REPO	ORT 01A Ø	Owner Thomas Belakie ×				+
All	✓ Search Q			Add S	haring	8
	Share With	v	Access	a Rights		Action
	User 👻	test90 TEST90 × +	View	Only	*	×
•	Role 👻	RJTEST × RALL2 ×	Full A	Access	¥	×
	2 of2 Items per page 10 ¥ H ≪ 1 /1 ≻ H					
	z o z I menia per page 10 - + 1 - 4 - 1 - 4 - 4					

The Report Designer/Access page allows you to:

- View and edit report owner.
- View list of sharing's.
- View, edit, or remove who the report is shared with.
- To add a sharing, select the **Add Sharing** button, select **Everyone**, **User**, **or Role**, select the appropriate entities to share with, then set **Access Rights**.
- You can delete/revoke access by selecting the X icon.

6. Report Viewer

🔳 Reports 🔸 💭 Dashboards 🔶	
REPORT 01A	Add Subscription x Subscribe Print Email Export - Edit - Update Result
✓ Filters	Schedule Delivery
	Subscription Type Subscribed Reporting Item * Time Zone (UTC-12:00) International Date Line West * Start Date 03/06/2020 🗎 Start Time 💿
All - Search Q	Recurrence Every Day -
Instance Name Sch	n Delivery Type Delivery Method
	OK Cancel
Copyright 2020 AssetWorks, LLC	Unicel

The <u>Report Viewer</u> option allows you to:

- View report output.
- Schedule the report by using the **Subscription** functionality.
- Export to a variety of file formats.
- Print the report.
- Hide header and footer.
- Email a report.

7. Grid – Report Part

				Export -	Updat	te Result Save	- Cancel	Report V
EPORT 01A 🖉			Preview Records	10	•	REPORT PART	PROPERTIES	Less
🗸 Report Body 📄 Sna	ap to Grid					Grid		Ŧ
Grid Grid 1						Grid Style	Vertical	•
BillingCode	BookValue	ChangeDate				Separator Style	Comma	•
AP99	0	2019-09-09T12:31:				▼ Table		
AP99	0	2019-09-09T12:31:				Border	¢	
AP99	0	2019-09-09T12:31:				Background	٥	
AP99	0	2019-09-09T12:31:				Color		
AP99	0	2019-09-09T12:31:				Alternative Background	None	*
AP99	0	2019-09-09T12:31:				- Columns		
AP99	0	2019-09-09T12:31:				Width	150	Pixel
AP99	0	2019-09-09T12:31:				Alignment	≞ ± ±	=
AP99	0	2019-09-09T12:31:						
AP99	0	2019-09-09T12:31:				Word Wrap	_ 2	

The <u>Report Designer/Grid</u> page is a report type available for use on the report grid or report body section. It supports four different styles: vertical, horizontal, pivot, and drill-down.

8. Chart – Report Part

EPORT 01A 🖉	Preview Records 10	•	REPORT PART	PROPERTIES	<u>Less</u>	>
Report Body Snap to Grid			Chart		-	
L Chart 🖉	Number of Records	□ ※ ₽ ×	▼ General Info)
hart 1			Chart Type	Pie	•	
			✓ Chart			
			Border	¢		
			Background Color	٥		
			Color Theme	No Theme (defa	¢	
			Multi-Color 👩			
			Data Labels	ab,		
			Hover Labels			
			✓ Legends			

The <u>Report Designer/Chart</u> page is a report type available for use on the report grid or report body section. It displays data using graphical symbols, options include pie charts, line charts, and bar charts.

9. Form – Report Part

		Export 🗸	Update Result Save - Cancel Report	ort Viewer
REPORT 01A	Preview Records	10	▼ REPORT PART PROPERTIES	>
✓ Filter		Add Filt	Form	- Filte
			▶ Form	Filter Properties
			➤ Edit	erties
			➤ Tool	
Filter Logic Example (1 OR 2) AND (3 OR 4)		Validate Synta	→ HTML	eld Pro
✓ Report Body □ Snap to Grid	0 0 0		Wrap Text 🖉	Field Properties
			Highlight Code 🕑	
Form			Reformat 🖄	Repor
Visual HTML			View	t Part
1 <01V> 01V				Report Part Properties
				ties

The <u>Report Designer/Form</u> page is a report type available for use on the report grid/report body section.

10. Gauge – Report Part

PORT 01A 🖉				Preview Records	10	•	FIELD PROPER	RTIES Less
Report Body 📄 Snap to	Grid						Gauge	▼ Count (Arriva ▼
	Configuration	Ð	G	Preview				
ïtle							Туре	
Gauge		\$	Gauge				Name	Alias 1
escription			Guage 1				Field Name	ArrivalDate
Guage 1 abels (X-axis)		\$	0	0.03			Field Name Alia	Count (ArrivalDate)
DepreciationCost ×		٦.					Data Type	Datetime
		+					Visible	V
/alues (Y-axis)	×		0 378375	278275 0	153 378		▼ Data Format	ting
✓Metric 1			· · · · · · · · · · · · · · · · · · ·	6/46/2 U	.53 570		Function	Count -
Value	(ArrivalDate) ×	-					Format	
Scale From	То						Sort	11
				5 v k (1 /1)			Color	Α

The <u>Report Designer/Gauge</u> page is a report type available for use on the report grid or report body section. This type of report displays data using a speedometer-like graphic.

Dashboard Designer

Dashboards are collections of report parts. You can pull one or more parts of one or more lzenda reports into a dashboard and arrange them in a custom manner.

The Dashboard Designer page allows you to:

- Use preset layouts or customize layout.
- Add report parts.
- Edit description and background.
- Copy and move dashboards.
- Use presentation mode.
- Configure sharing access.
- Manage subscriptions and schedules.
- Print, e-mail dashboards.
- Manage filters.

	Reports + Dashboards +										
«	All V Search Q										
ALL DASHBOARDS	LOCAL CATEGORIES										
Local Categories 👻	DASHBOARD										
Dashboard 🥜	Dashboard Demo 1										
PETE CAT 🕨 💉	PETE CAT - PETE SUBCAT										
Uncategorized	Pete's Dashboard										
	UNCATEGORIZED										
	Trang										
Copyright 2016 - 2020 Izenda, Inc.											

- To create a new dashboard select the + icon.
- You can select a blank layout or one of the preset options from the popup.

RESYNC ROLES	Dashboard Preset Layout ×
Example Dashboard Name 🖉	Select the preset layout that you want to use for your dashboard.
✓ Filters	
Copyright 2020 AssetWorks, LLC	

- You can also rename the dashboard by selecting the **pencil** icon next to the dashboard name.
- You can add additional tiles by selecting the **Add Dashboard Tile** button to the left of the **Save** button.
- Each dashboard tile has two options for type:
 - 1. Report Part
 - 2. Text

		Access	Subscribe	Edit +	Print	Email	Update Results	Add Dashboard Tile	Save	Cancel	Close
Dashboard01 🖉											
✓ Filters											Freeze
	000										
Title	Text Tile Example										•
Description	This is an example of what you can do with a text tile										٥
Body Text	Roboto		∞ 14							Ť	
Conversion 2016 - 2020 Image In											

					Access	Subscribe	Edit +	Print	Email	Update Results	Add Dashboa
										<u> </u>	
											_
Report Part Selection	on										×
Search Criteria											
Save Into	Local Categories	-									
Category	TEST REP 987	-	Sub Category	All			-				
Report Name											
Created By			Created Date	From			#	То			•
Last Edited By			Last Edited Date	From				То			
										Search Res	set
	_										

- To add a report part, select the **Report Part** option in the tile.
- The **Report Part Selection** pop-up displays, you can search through available parts here. Enter criteria and select **Search**.
- A list of available reports displays.

	Report Part Selection										
🗏 Reports 🕂 💭 Dashboards 🕂	Search Result Select a report, then select the	report part you would like to d	isplay on your dashbo	oard tile							
	Report Name	✓ Save Into	Category	Sub Category	Created By	Created Date	Last Edited By	Last Edited Date			
	🔵 tester mac report	Local Categories	TEST REP 987	TEST SUB 987	Mac Breuer	09/17/2019	Mac Breuer	09/17/2019			
	sgh - test 2	Local Categories	Sharon		Sharon Henry	10/16/2019	Sharon Henry	10/16/2019			
	Units View Demo	Local Categories			Thomas Belskie	12/23/2019	Thomas Belskie	02/28/2020			
	Units Active	Local Categories			Percy Rucker	01/08/2020	Percy Rucker	01/08/2020			
	Sharon Test 1	Local Categories	Sharon		Sharon Henry	10/09/2019	Thomas Belskie	12/23/2019			
	SHARON TEST 1	Local Categories			Sharon Henry	02/26/2020	Sharon Henry	02/26/2020			
	REPORT 01A	Local Categories			Thomas Belskie	01/17/2020	Thomas Belskie	01/17/2020			
	Paul Chart1	Local Categories			Paul Kinkel	02/24/2020	Paul Kinkel	02/24/2020			
	🔘 РК1	Local Categories			Paul Kinkel	01/22/2020	Paul Kinkel	01/22/2020			
	PK WO BASIC 1 to 10 of 17 Items per page 10	Local Categories			Paul Kinkel	02/21/2020	Paul Kinkel	02/26/2020			
	Report Part Title			✓ Re	eport Part Type						
	Grid				I Grid						
	Gauge			7h Gauge							
	Chart			Lab	L Chart						

- Select the radio button next to the report from which you want to add a report part.
- A list of available report parts displays below the report list.
- Select the radio button next to the report part you want to add.

You can only add one report part per tile. If you want to add multiple parts from the same report, you will have to add a tile to the dashboard for each one.

• Select **Ok** to add the part to your dashboard.

Edit Dashboard

	D Access Subscribe	Edit • Print Email Upda Results Add Dashboard Tile Save • Cancel Close
		Dashboard Description Set Background Color
Gauge Guage 1		Set Background Image Copy
0	0.03	Move Show fitte descriptions on tile
0 378962 578962	0 153 578962	0 88 578952
0.25 	0.33	
Copyright 2016 - 2020 Izenda, Inc.		

The Edit dashboard menu allows you to:

- Edit the description.
- Set a background color and image.
- Copy or move the dashboard.
- Show or hide filter descriptions.

Presentation Mode

Dashboard01 🖉		
✓ Filters		
Grid 1		
BillingCode	BookValue	ChangeDate
AP99	0	2019-09-09T12:31:
Copyright 2016 - 2020 Izeno	da, Inc.	

- Select the play icon to enter Presentation Mode.
- This mode allows each dashboard tile to take a turn being displayed for a set amount of time.

Dashboard01 🖉			
	Ducategorized/REP.		
	Grid Grid 1		
	BillingCode	BookValue	ChangeDate
	AP99	0	2019-09-09T12:31:
Copyright 2016 - 2020 Izenda, Inc.			

- Use the < and > arrow buttons to switch between tiles or enter a time interval in the section highlighted in the above screen shot.
- Select the **Full Screen** button to start the presentation.

Configure Sharing/Access

	Access Subscribe Edit - Print Email Update Results Add Dashboard Tile Save - Cancel Close
Dashboard01 🖉	Owner T ×
All v Search Q	Add Sharing
Share With Veryone Role User	Access Rights Action
1 to 1 of 1 Rems per page 10 • K < 1 / / 1 × K	

- Select the Access button to open the Sharing screen.
- Select the Add Sharing button to add a new sharing setting for the dashboard.
- Select who to share with (Everyone, Role, User).
- Set Access Rights for the sharing.
- User the **X** button to delete or remove a sharing.
- Select **Save** when finished.

Subscriptions/Scheduling

		Add Subscription				×			
Dashboard01 🖉									
All 👻 Search		Instance Name	Schedule 1						Add Subscription
Instance Name	✓ Schedule	Sch	edule				on	Delivery Type	Delivery Method Action
No record found.		Subscription Type	Subscribed Repor	ting Item		-			
		Time Zone	(UTC-12:00) Inter	national Date Line V	Vest	-			
		Start Date	01/17/2020 🗎	Start Time	09:38:01	0			
		Recurrence	Every Day			Ŧ			
			Every Day						
			Every Weekday						
			Every Week						
			Every Two Weeks						
			Every Month						
		·	Every Quarter						
			Custom Recurren	ce					
					UK	Cancel			

- Select the **Subscribe** button at the top of the screen to open the **Subscriptions** page.
- This functionality is like report subscription/scheduling functionality.
- Select the Add Subscription button to launch the Scheduling/Delivery pop-up.
- After entering **Schedule** and **Delivery** information, select **OK** to proceed add subscription.

Other Options

- You can also **Print** dashboards by selecting the **Print** button.
- You can Email dashboard by selecting the Email button
- Select the **Update Results** button to refresh the dashboard and display the most current version/information.
- The **Cancel** button allows you to cancel any current editing action on the dashboard that has not yet been saved.
- Select **Close** to exit the Dashboard Designer and return to the Dashboard List.

Please consult Izenda's user documentation for more information on Dashboards.

M5 Application Frames

Role Maintenance

SA	/E UNDO	DEE	RESH	DELETE	FIND	RELATED V					
						KELAILD ¥					
Role	Mainten	ance									
- Role Inform											
Role:	Description:										
	Π.	Ĩ				Ϋ́	1				
🛨 Gene	al Locations/ Oper Entities	Menus/ KPI	Privileges	Reporting	Application Users	Departments/ Chat Groups	Vendor Gateway	Indirect Accounts			
Printer	Groups										
	Unauthorized Pri	nter Groups		Autho	rized Printer Gro						
			^			^					
			>>								
			<								
			T			-					
Report	Groups										
	Unauthorized Re	port Groups		Autho	rized Report Gro	oups					
			^			^					
			-			-	-				
Default I	teport Group:										

• You can configure **Ad Hoc Access Group** settings on the **Reporting** tab of the *Role Maintenance* frame. Groups are set up and configured using the *Ad Hoc Group Maintenance* frame. **Application User Maintenance**

SAVE UNDO REFRESH DELETE	FIND MORE ~ RELATED ~
Application User Maintenance	
Application User Information Application User: Allow Web Access: Password: Password Expire (days): User can change password:	Disabled: No T
Force password change next login: Allow Mobile Access: Password:	
Adhoc Access: Adhoc Starting Folder: Account Expiration Date:	
User Role: User Based Dashboard: Idle Timeout Minutes: Crystal Enterprise User: Pooled:	

- Ad Hoc Access settings for individual users are set on the *Application User Maintenance* frame.
- **Options:** None, Run Reports, Create Reports, or Report Admin.

Ad Hoc Group Maintenance



- The *Ad Hoc Group Maintenance* frame allows you to create and configure access settings for your ad hoc groups.
- This frame also defines which views the users can use for reporting.
- The data sources for the ad hoc reports are views of the M5 data and display on the **Objects** tab.
- These data views allow you to manipulate and customize the data for reporting purposes without modifying the actual data.

Adhoc Query Admin

Adhoc Query Admin		
(Re)Syncronize Company (Tenant) information with Izenda Configuration DB.		
(Re)Syncronize M5 DB Connection/Data Sources with Izenda Configuration DB. This should be done anytime a new adhoc object has been added. Warning: ReSyncing data source could take several minutes.		
(Re)Syncronize all roles. Warning: ReSyncing all roles could take several minutes.		
(Re)Syncronize all Users. Warning: ReSyncing all users could take several minutes.		

- The Adhoc Query Admin screen helps facilitate synchronizing data between M5 and the Izenda configuration database.
 - Men Ad Hoc is initially installed or setup, an ad hoc admin user should go to the Adhoc Query Admin screen and select the buttons in the order they are on the frame (top to bottom). If the client is multi company, this will need to be done for each company.
- When a user navigates to the Ad Hoc Query frame, the tenant, data sources, roles (for that user only), and user information (for that user only) are synchronized if they haven't already been synchronized.
 - Because the Data Source synchronization can take several minutes, it is best for an Ad hoc Admin to synchronize from the Adhoc Query Admin screen before any users navigate to the Ad Hoc Query frame.
- Each button calls a custom webservice endpoint:
 - **Sync Tenant** - Creates or updates a tenant in the Izenda Database. The tenant is used for the same purpose as M5 uses company. The tenant name or id is equal to the M5 company code. This typically only needs to be done when Ad Hoc is initially installed/setup. Running it more than once won't hurt but is not necessary. There is an M5 Param called: M5 PARAM 'ADHOCBI TENANT ID'. The default value for this parameter is the company code.

- **Sync Data Sources** Creates or updates the connection string to the M5 database, the M5 database schema, the M5 views that can be used in a report.
 - This should be done when Ad Hoc is initially installed or set up. It should also be done anytime an M5 patch is installed (to ensure any changes to the M5 database schema are reflected in the Izenda database) or anytime a new object is added to the Ad Hoc Objects screen (so that object will be marked as usable on a report).
 - This can take several minutes. For best results, an admin should run it here on this frame rather than let the token webservice endpoint create the data source.
- Sync All Roles Creates or updates all roles in Izenda as defined on the M5 Adhoc Group Maintenance frame. Can be optionally run to create Roles in Izenda based on Ad Hoc Groups. Three Roles will be created in Izenda per Ad Hoc Group. One starting with A-, one starting with C-, one starting with R-.
 - For example, C-All. This should be run anytime Ad Hoc Objects are added to or removed from an Ad Hoc Group. The A-, C-, R- equate to the Ad Hoc access granted to a user on the Application User frame. It determines whether a user can create a report, or only view a report (A- = Report Admin, C- = Create Reports, R- = Run Reports).
 - ▲ If this is not run, the Roles that are assigned to a user will be synchronized the first time they navigate to the *Ad Hoc Query* frame. Is this why we see the gears running every time we enter this frame? The user can also re-synchronize their roles by selecting the 'ReSync Roles' button on that frame.
- Sync All Users Creates or updates all users in Izenda as defined on the M5 Application User Maintenance frame. The user's information will be synchronized when they visit the Ad Hoc Query frame. An Admin may want to run this button when there are users that have been disabled. Those users will not be able to log in because they are disabled, but another user may be able to see the disabled user in the Ad hoc UI when doing things such as sharing a report with another user.

Additional Resources

- Calculated Field Expressions
- Grand Total and Subtotal
- Filter Operators
- Izenda Training Walkthroughs:
 - Creating Your First Report <u>Click Here</u>
 - Adding to Your Report <u>Click Here</u>
 - Styling Your Report <u>Click Here</u>
 - Creating Your First Dashboard <u>Click Here</u>

Updates

Release	Section	Description
23.2	All sections	Applied miscellaneous writing style updates throughout the document.
24.0	Setup and Configuration	Updated the reference to the M5 Ad Hoc Izenda Install Guide.