

User How-to Guide

Oracle Application Express Interactive Reports (APEX IR) offer dynamic functionality with a wealth of built-in features and its enhanced toolbar. This allows you to customize these reports to specifically show the data you are interested in. The interactive reporting function is available in a number of applications used here at Valdosta State University, including but not limited to:

- **Success Portal**
- **Financials Data Warehouse**
- **Degree Works**
- **Employee Training Database**

Learn to use Interactive Reports (IR):

1. [Interactive Report \(IR\) features](#)
2. [Actions Menu tools](#)
3. [Formatting your report](#)
4. [Discarding or saving your reports](#)

For additional assistance:

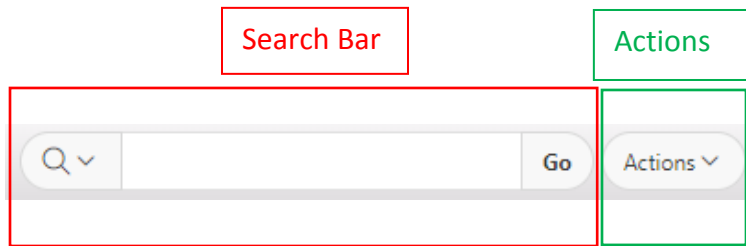
Contact VSU Solutions Center:

229-245-4357 (HELP) or solutions@valdosta.edu

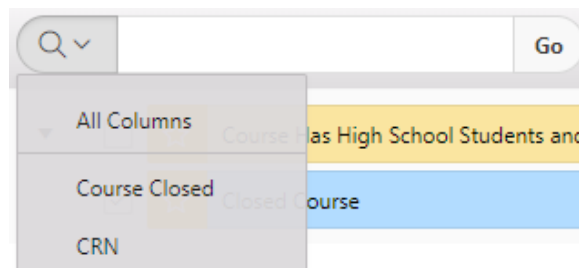


Interactive Report (IR) Features

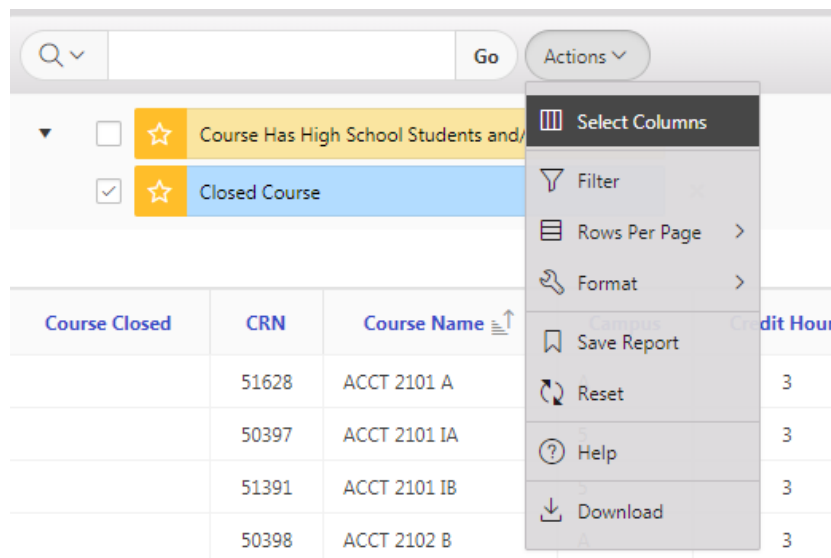
The APEX IR **Toolbar** is comprised of a Search Bar and an Action Menu.



The **Search Bar**, the left portion of the toolbar, allows you to search based on a key word that you enter. The dropdown menu (magnifier icon) allows you to select whether you search a single column or all columns for this key word.



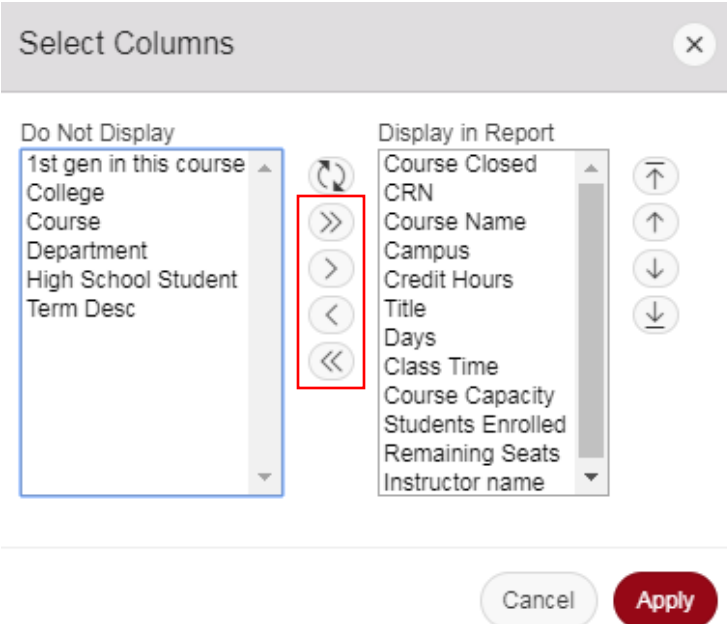
The **Actions Menu**, on the right side of the toolbar, provides a dropdown list of actions that you may perform on the data set (e.g., select columns, filter, rows per page, sort, save report, aggregate, download, etc.) We will talk more about each of these functions below.



Actions Menu Tools

Actions Menu > Select Columns Select Columns

This function allows you to select and order the displayed columns. When you click Select Columns in the Action Menu, a pop-up window will appear. Selecting a column and then clicking the left or right arrow buttons, allows you to move the column to the left or right side of the window. Only the **columns on the right** will be **visible on your report**. Clicking the double arrows (>> or <<) move all columns at the same time.



Select Columns ×

Do Not Display

- 1st gen in this course
- College
- Course
- Department
- High School Student
- Term Desc

Display in Report

- Course Closed
- CRN
- Course Name
- Campus
- Credit Hours
- Title
- Days
- Class Time
- Course Capacity
- Students Enrolled
- Remaining Seats
- Instructor name

Cancel Apply

If you select a column in the right side of the window, clicking the up or down arrow buttons will allow you to adjust the order that columns appear in your report. Columns that are closer to the top of this list will appear closer to the left side of the report. Click the Apply button when you have finished making changes.

Select Columns ×

Do Not Display

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
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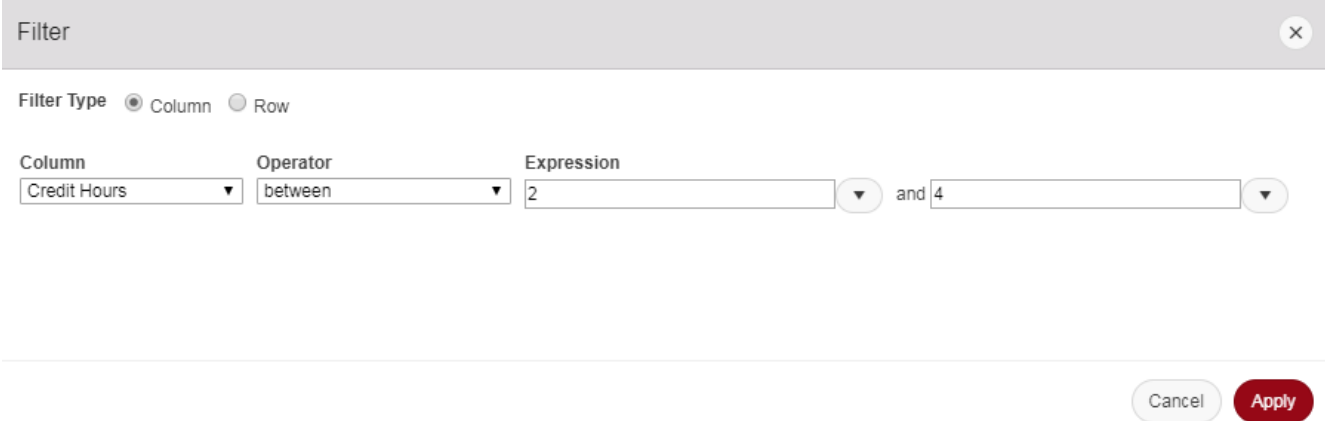
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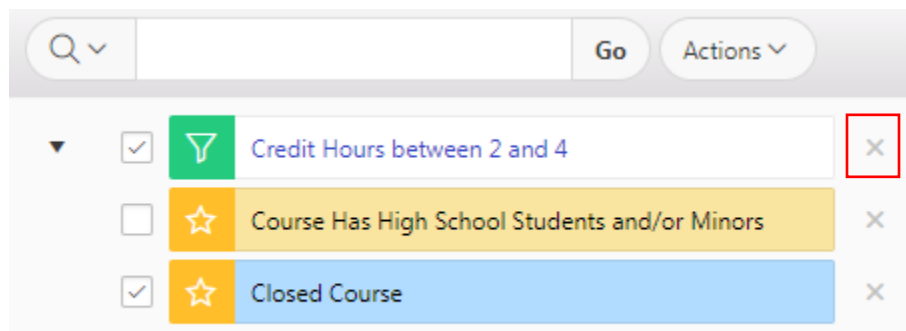
Cancel Apply

Actions Menu > Filter  Filter

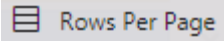
Creating a filter allows you to create simple or complex conditions to define which columns or rows that appear in your report. When you select Filter in the Actions Menu, a pop-up window will appear. Here you will be able to set the conditions for a filter that meets your individual reporting needs. Click the Apply button when you have finished making changes. More in-depth [documentation on filters can be found on Oracle's website](#).



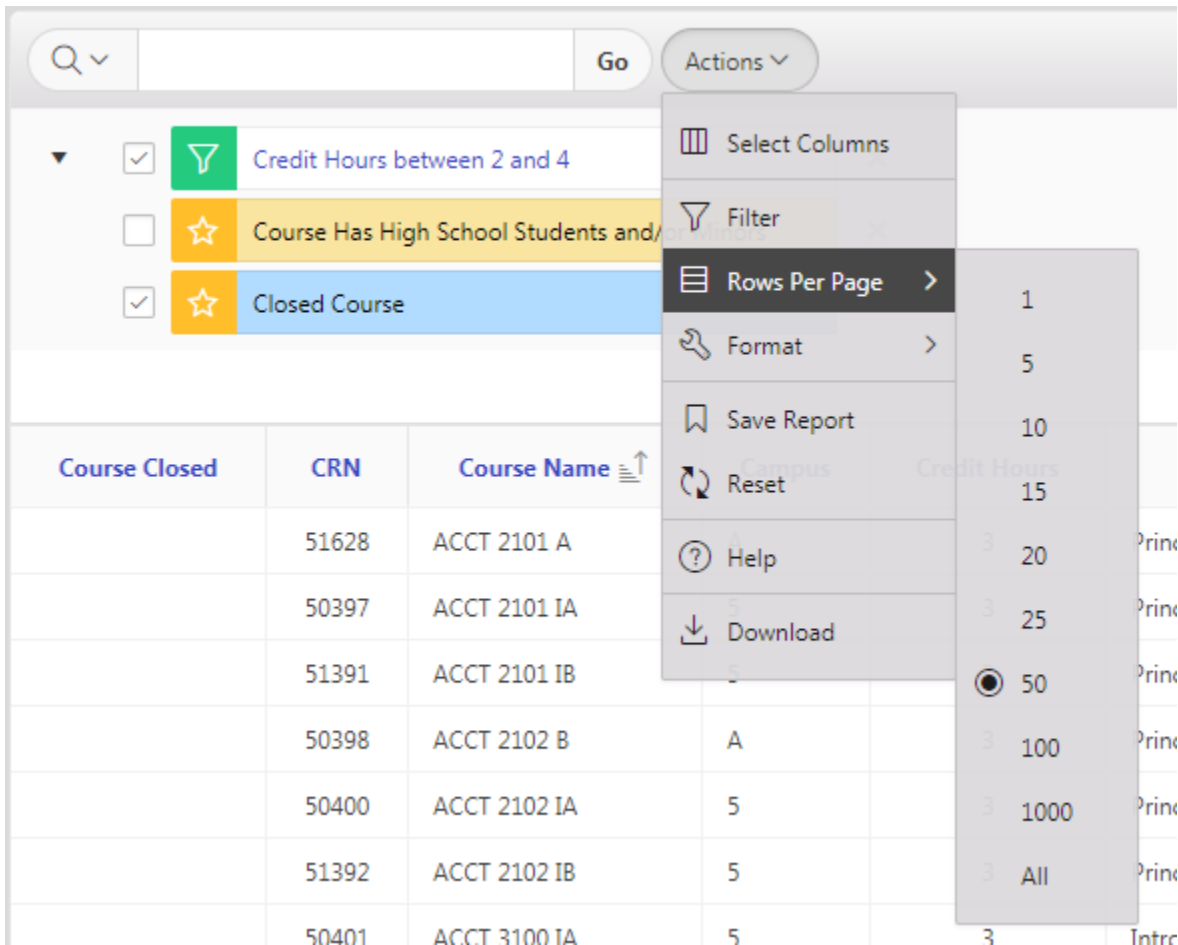
When you return to the report, you will see a list of your **filters directly below the Actions Menu**. Click the X on the right of a filter to remove it from the report.



Actions Menu > Rows Per Page



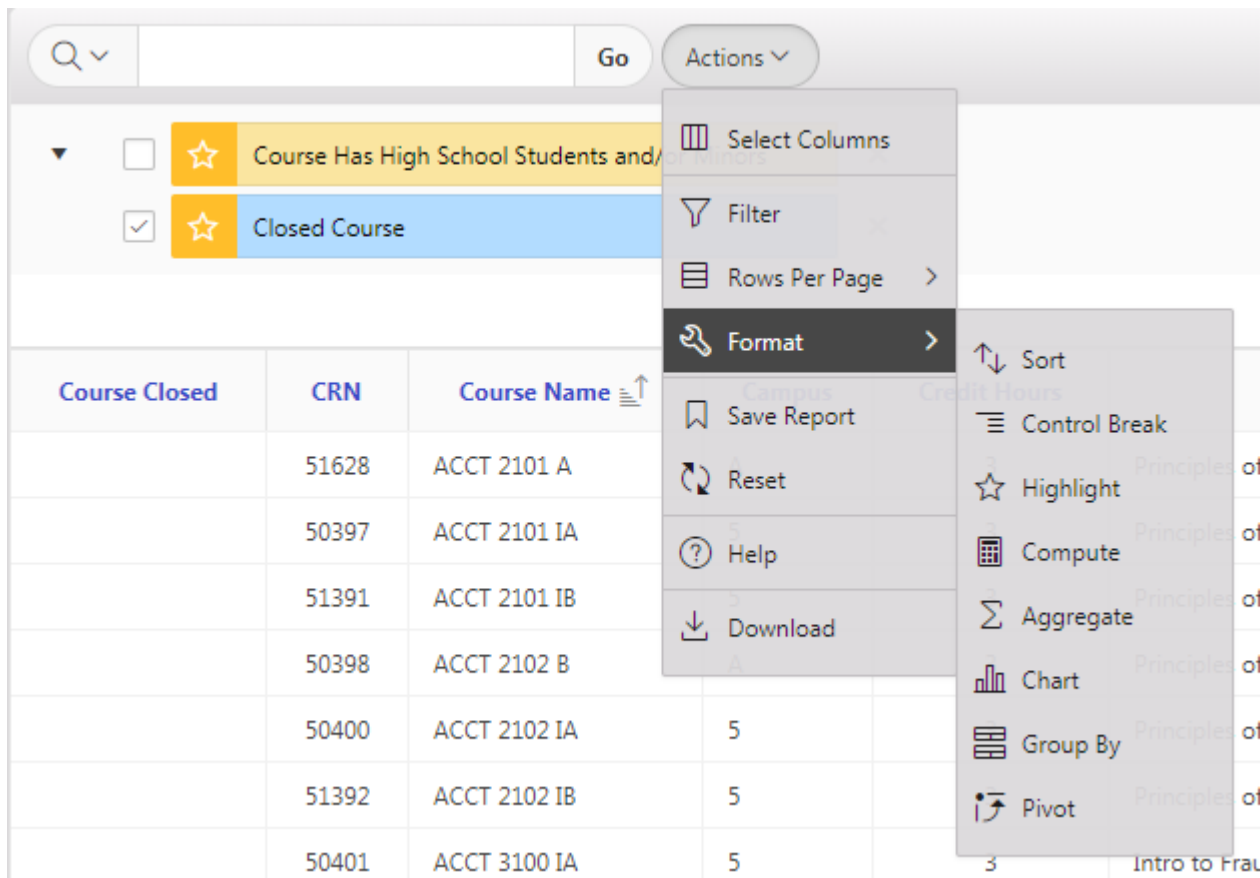
You can adjust the number of rows that are displayed on each of the pages of your report. When you click Rows Per Page in the Action Menu, a dropdown menu will appear. Select the number of rows you would like displayed. Alternatively, there is a selection listed to display all rows.



Formatting Your Reports

Actions Menu > Format  Format

When you click Format in the Actions Menu, a dropdown menu will appear. The tools in this menu will allow you to customize visual elements of how your report is displayed. Below, we will provide an overview of each of the selections in this menu, but more [in-depth documentation can be found on Oracle's website](#).








The screenshot shows an APEX Interactive Report interface. At the top, there is a search bar with a magnifying glass icon and a 'Go' button. To the right is an 'Actions' dropdown menu. Below the search bar, there are two filter items: 'Course Has High School Students and/' (with a star icon and a dropdown arrow) and 'Closed Course' (with a star icon and a checkmark). The main report area is a table with columns: 'Course Closed', 'CRN', 'Course Name', 'Campus', 'Credit Hours', and 'Principles of'. The 'Course Closed' column is highlighted in blue. The 'Format' option in the Actions menu is selected, and its dropdown menu is open, showing the following options: Select Columns, Filter, Rows Per Page, Format (selected), Save Report, Reset, Help, Download, Sort, Control Break, Highlight, Compute, Aggregate, Chart, Group By, and Pivot.

Course Closed	CRN	Course Name	Campus	Credit Hours	Principles of
	51628	ACCT 2101 A			
	50397	ACCT 2101 IA			
	51391	ACCT 2101 IB			
	50398	ACCT 2102 B			
	50400	ACCT 2102 IA		5	
	51392	ACCT 2102 IB		5	
	50401	ACCT 3100 IA		5	

Actions Menu > Format > Sort

This tool allows you to change the order in which data is displayed by sorting rows alphabetically or numerically based on one more more of the columns. You can also sort the rows by clicking on a column header and then clicking the Sort Ascending or Sort Descending icons that appear.

CRN	Course Name 	Campus	Cre
51628	 		

Actions Menu > Format > Control Break

This tool allows you to group rows of data together based on a common from one or more of the columns. Click the X on the right of a control break to remove it from the report.

Actions Menu > Format > Highlight

This tool allows you to change the text and background colors of rows or cells that meet criteria you define. Click the X on the right of a highlight to remove it from the report.

Actions Menu > Format > Compute Compute

This tool allows you to create a new column based on mathematical computations performed on data from other columns, allowing you to build calculations such as standard deviation, a percentage discount, or a salary bonus.

Actions Menu > Format > Aggregates Aggregate

This tool allows you to add a row that provides a sum, count, or average of other rows. In order to use it, you would need to begin by adding a control break. After you have done so, you can apply aggregates to each of the sections you created.

Actions Menu > Format > Chart Chart

This tool allows you to create a visual representation of your data like a bar, pie, or line chart. Once you have created your chart, you can switch between the data and the chart using the **buttons that appear between the Search Bar and Actions Menu.**



Discarding or Saving Your Reports

Actions Menu > Reset

This tool clears all action and search settings, restoring the report to its default view. When you select this tool, you will be prompted to verify that you wish to reset your report.

Reset ×

Restore report to the default settings.

Cancel Apply

Actions Menu > Save Report

This tool allows you to save your report inside of APEX IR. This way, it will be available to you on future logins. If you would like to export your report outside of APEX IR, use the download tool below instead. When you select this tool, you will be prompted to enter a name which will help you identify which saved report you are accessing later. You may also enter a brief description to help you remember what the report contains. After you have entered both, click the **Apply** button.

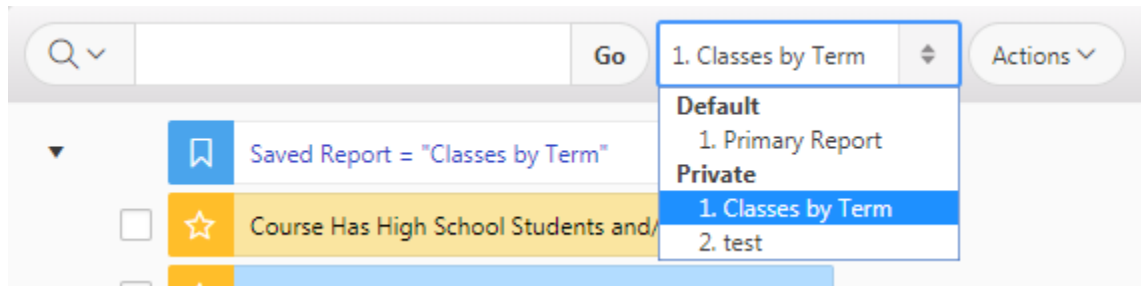
Save Report ×

Name

Description

Cancel Apply

After you have saved at least one report, a new **dropdown menu will appear between the Search Bar and Actions Menu**. There, you can click the name of your report in order to view it. Alternatively, you can click the Primary Report to return to your default view. Please note that **only you can view your saved reports**.



Actions Menu > Help

This tool allows you to access a brief overview of the features found in APEX IR, and it is great for getting quick guidance with APEX IR features without needing to refer back to this document.

Actions Menu > Download

This tool allows you to export your report in a number of formats, such as Microsoft Excel (XLS), Adobe Acrobat (PDF), or Word (RTF). When you click the format you want to use, it will automatically begin downloading the document to your computer's default download location.

