# SmartSimple Reports:
# Build-A-Report that's not a bear

## Webinar hosted by eTRANSERVICES

**CERTIFICATIONS:** SBA SDVOSB certified | CMMI DEV/SVC ML3 | ISO 9001/20000/27001 | CMMC | IL4 | FedRAMP Mod – In Progress

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www.udpaas.com
www.etranservices.com

**EMAIL OUR TEAM**
DigitalServicesTeam@etranservices.com
info@etranservices.com

**PRESENTERS**
Presentation: Andrew Chin
Demonstration: Daniel Mbewa

# About Us

eTRANSERVICES - enterprise TRANsformational SERVICES

## Core Competencies

| Systems Engineering | Information Technology | Cyber Security | Cloud | Business | Services and Products |
|---|---|---|---|---|---|

### Digital Services Team

Over 10 years of experience with Grants Management and SmartSimple Cloud Solutions

### Universal Design Platform as a Service (UDPaaS)

Our FedRAMP-Compliant platform powered by SmartSimple

eTRANSERVICES | smartsimple CLOUD | UDPaaS Powered by eTRANSERVICES

# Webinar Overview

**01** Introduction

**02** Alternatives to Report Builder

**03** Understanding Report Builder

**04** Planning before You Build

**05** Building Efficient Reports

**06** Common Pitfalls

**07** Live Demo

**08** Q&A

# List Views

A customizable table to view, filter, and manage records — each row is a record, each column a data field.

**Designed for day-to-day work**

## Use it to:
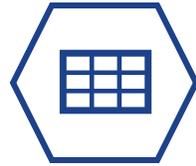
Choose Columns

Sort + Filter

Batch Update / Quick Edits

Export or Group Email

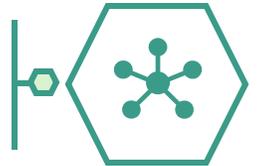## Why it matters:

Customized Data View

Organize Records Efficiently

Update Multiple Records Quickly

Easier Sharing of Information

# Report Builder
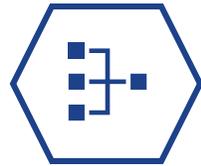
SmartSimple feature which can build tables from multiple datasets

**Best for analysis and reporting**

## Use it to:

Display data from multiple datasets

Sort + Filter

Group (aggregate) data

Export data to Excel spreadsheets

## Why it matters:

Show complex data relationships

Query specific records with criteria

Summarize data over groups of records

Share more details per record

# List Views vs Report Builder

| Use case / need | Choose List Views | Choose Report Builder |
|---|---|---|
| Day-to-Day Work | Faster record access and review | More detail for deeper analysis |
| Data layout | Up to 10 columns | >10 columns |
| Find what you need | Search + save filters | More complex filter criteria |
| Take action | Bulk updates / quick edits / group email/workflow triggers | Scheduled export or bulk actions |
| Analyze & summarize | Basic viewing | Formulas + grouping + aggregations |
| Combine data | Simple record set | Multi-level grouping + linked datasets |

# Planning Before You Build

**Identify your audience and data needs**

1

2

**Know which data sources and fields to include**

3

4

**Identify criteria**

**Choose your reporting tool**
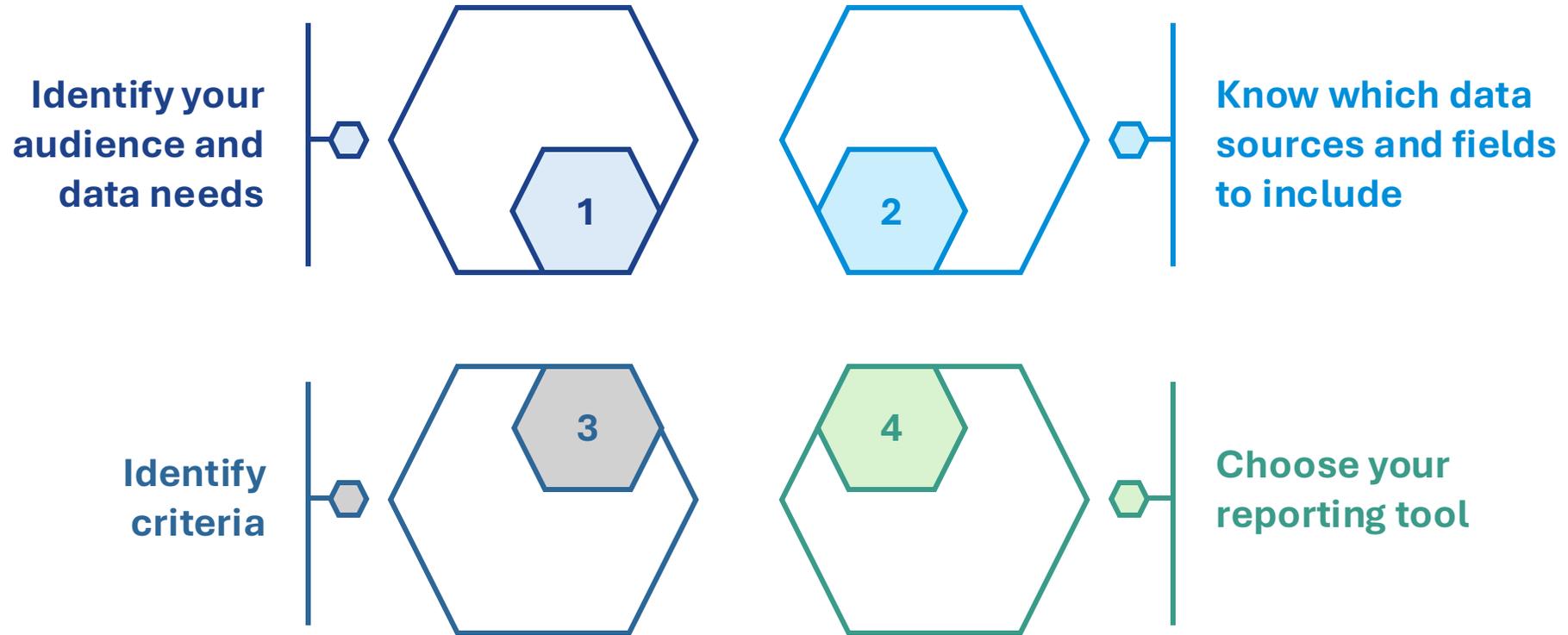
# Building Efficient Reports
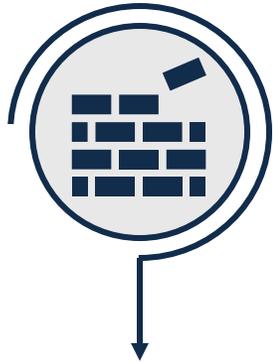
## Start Small

- ✓ Filter early to limit the dataset
- ✓ Add one data source at a time
- ✓ Preview as you build (iterate)

## Keep it Maintainable

- ✓ Use clear, consistent naming
- ✓ Add a short description stating purpose
- ✓ Use categories to group related reports

## Use Reporting Functions

- ✓ Add formulas
- ✓ Use groupings & aggregations (totals, min/max, distinct counts)
- ✓ Sorting & displaying columns

# Pitfalls / How to Avoid

## Common Pitfalls

- Overcomplicating reports

- 30+ columns (hard to read and maintain)

- Skipping validation and testing

## Validation Checklist

- Run the syntax checker (field names + values)

- Compare expected vs actual record counts

- Spot-check with List Views (counts + key fields)

- Validate with detail vs summary versions

# Demonstration

**Presented by Daniel Mbewa**

Solution Designer of

Digital Services Team at eTRANSERVICES

# Q & A: What else would you like to know?

**Thank you for your time and participation today!**

Scan the QR code to access our Linktree, where you'll find links to our company website, contact details, and social media platforms!

Please feel free to reach out with any additional questions:
DigitalServicesTeam@etranservices.com

# Accreditations



CMMI ML3 APPRAISED SVC — Appraisal # 70097 | Exp. Mar 26, 2027

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