Pulse Connect

PULSE101 TRAINING

Ad Hoc Reporting

Step-by-step guide · Report Builder

Module	Reporting — Ad Hoc Report Builder
Audience	Accounting, Commissions, Agency Management, Operations
Length	12 steps · approximately 15 minutes
Worked example	Cases with no recorded issue age (Client Issue Age < 5)
Source	UAT PulseConnect screen captures
Companion	Interactive walkthrough — guided and practice modes

How to read this guide. Every screen shown here is a direct capture from the UAT environment — nothing has been recreated. Where a behaviour was not captured, it is marked as inferred rather than stated as fact. The full observed-versus-inferred list is on the last page, and it is worth reading before you train anyone from this document.

At a glance

What the ad hoc builder is for, and when to reach for something else.

USE AD HOC REPORTING WHEN	USE SOMETHING ELSE WHEN
You need an answer now, and no saved report covers it.	The same report is needed on a schedule — build and save it, then schedule delivery.
You are chasing an exception — missing data, unexpected status, unassigned cases.	The answer already exists in a dashboard or a saved report.
You want to test a set of columns and filters before committing to a saved report.	The question spans objects the builder cannot join in one pass.

The twelve steps

Worked end to end on the Cases object, following the captured UAT session.

1 Open the report builder

DO THIS

1. From the top navigation, open the **Reporting** menu and choose the ad hoc report builder.
2. Confirm the environment label at the top right before you start — **UAT PULSECONNECT** means you are in the test environment, not production.

WHY IT MATTERS

An ad hoc report is built and run on the spot. Nothing is scheduled, shared, or visible to anyone else until you deliberately save it.

The global navigation. The Reporting menu is the entry point.

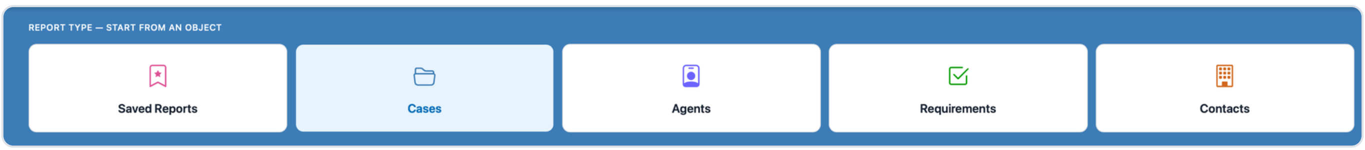
2 Choose the object you are reporting on

DO THIS

1. Under **REPORT TYPE — START FROM AN OBJECT**, select one of the five cards: Saved Reports, Cases, Agents, Requirements, or Contacts.
2. Select **Cases** to follow this guide.
3. Use **Saved Reports** when you want to re-open a report definition someone has already built.

WHY IT MATTERS

The object determines the entire field library that follows. Changing it later means rebuilding your column set, so decide first: are you answering a question about cases, about agents, about outstanding requirements, or about people?



The five starting objects. The selected card turns pale blue with blue label text.

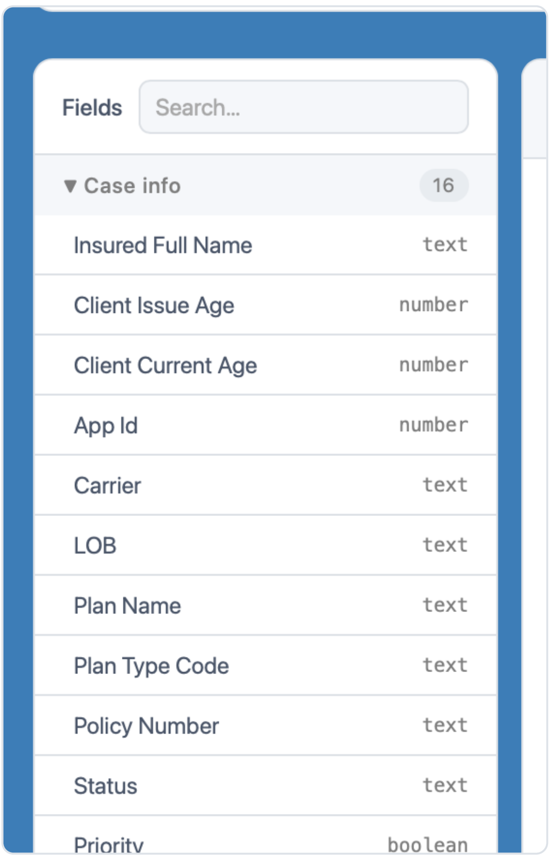
3 Read the field library

DO THIS

1. The left panel lists every field available for your object, grouped and collapsed.
2. Click a group header to expand it. The pill on the right of each header is the number of fields inside.
3. Use the **Search...** box when you already know the field name.

WHY IT MATTERS

Each field carries a type — **text**, **number**, or **boolean**. That type governs which filter operators make sense and, later, whether the field becomes a group key or a summed value. Reading the type now prevents a confusing result at the grouping step.



Case info expanded, showing field names with their type on the right.

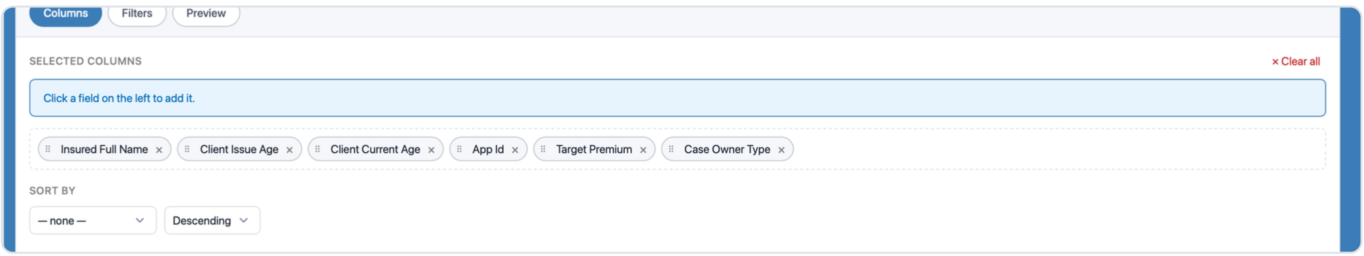
4 Add and arrange your columns

DO THIS

1. Click a field to add it. It appears as a chip under **SELECTED COLUMNS**.
2. Drag a chip by its grip handle to reorder — chip order is column order in the output.
3. Click **×** on a chip to remove one field; **× Clear all** empties the whole set.

WHY IT MATTERS

Column order is the first thing a reader notices. Lead with the identifier they recognise — insured name or policy number — then the values they came for.



Six selected columns as reorderable chips, with the Sort by controls beneath.

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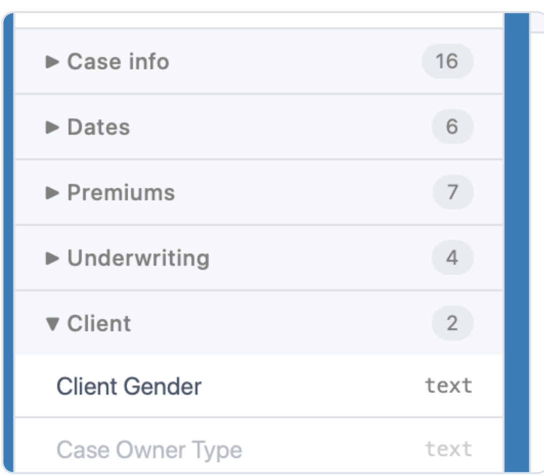
5 Expect used fields to grey out

DO THIS

1. Open a group containing a field you have already added.
2. Confirm it appears greyed and cannot be clicked again.

WHY IT MATTERS

The library mirrors your current selection, so a field cannot be added twice. If a field looks unavailable, check your chips before assuming a permission problem.



Case Owner Type greyed out in the Client group because it is already a column.

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6 Set the sort order

DO THIS

1. Under **SORT BY**, choose a field from your selected columns.
2. Choose **Descending** or **Ascending**. The default is — *none* — with *Descending*.

WHY IT MATTERS

An unsorted export of several thousand rows is far harder for a stakeholder to use than the same data sorted on the column they actually care about. Set it deliberately rather than leaving the default.

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7 Scope the report to an organization

DO THIS

1. Open the **Filters** tab.
2. Under **SCOPE TO ORGANIZATION (CONTRACTUAL HIERARCHY)**, leave **All Organizations** or narrow to a branch of the hierarchy.

WHY IT MATTERS

Scope is the population gate. Every condition you write afterwards filters within it, so setting scope first avoids tuning conditions against the wrong universe and wondering why the counts look odd.

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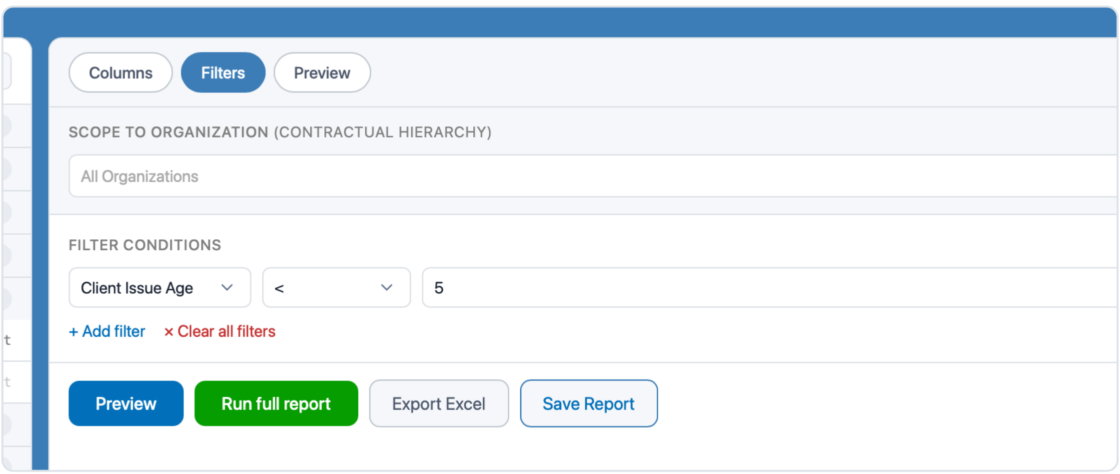
8 Add filter conditions

DO THIS

1. Under **FILTER CONDITIONS**, build a row: **field**, **operator**, **value**.
2. For this example use **Client Issue Age · < · 5**.
3. **+ Add filter** stacks another condition. **× Clear all filters** removes every row.

WHY IT MATTERS

This particular condition is a data-quality sweep: issue ages below five effectively mean the field never populated. Filters like this turn the builder into an exception-finding tool rather than just a reporting one.



The Filters tab: organization scope, one condition row, and the action bar beneath.

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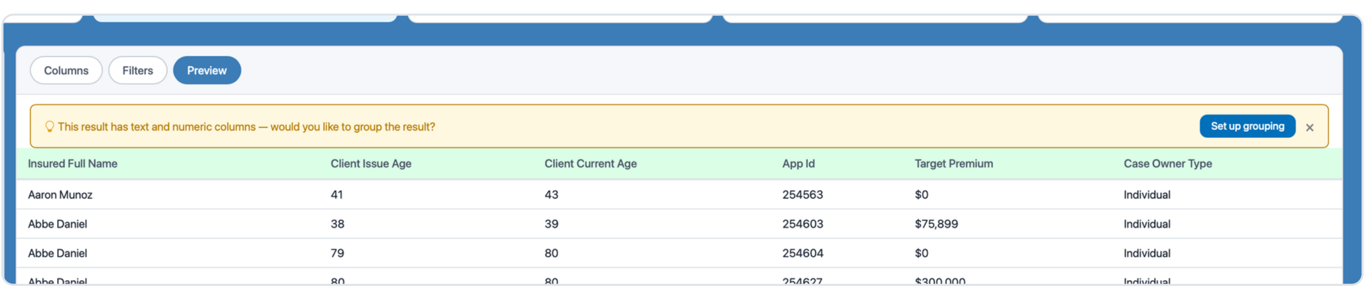
9 Preview before you run

DO THIS

1. Press **Preview**. The Preview tab returns a sample of the result.
2. Check column order, spelling, and whether any column comes back mostly blank.

WHY IT MATTERS

Preview is your proof step. Catching a wrong column here costs seconds; catching it after the file has gone to a carrier or a producer costs a great deal more.



The preview with the grouping prompt above the sampled rows.

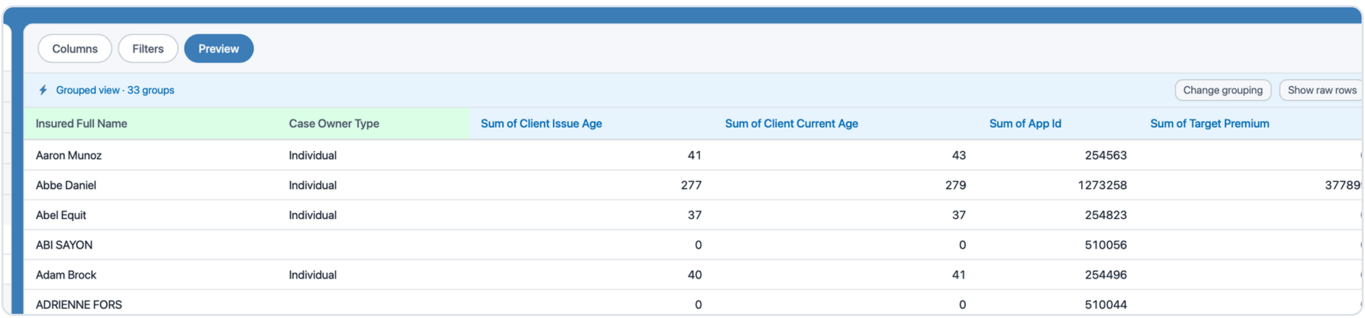
10 Group the result when prompted

DO THIS

1. When the yellow banner asks *"This result has text and numeric columns — would you like to group the result?"*, press **Set up grouping**.
2. Or dismiss the banner with **×** to keep the row-level view.
3. In the grouped view, use **Change grouping** to revise it and **Show raw rows** to drop back.

WHY IT MATTERS

Text columns become group keys and keep their green header styling; numeric columns become **Sum of...** in blue. Read those sums critically — *Sum of App Id* adds identifier numbers together, which is arithmetically valid and completely meaningless. Group only what should legitimately aggregate.



Insured Full Name	Case Owner Type	Sum of Client Issue Age	Sum of Client Current Age	Sum of App Id	Sum of Target Premium
Aaron Munoz	Individual	41	43	254563	
Abbe Daniel	Individual	277	279	1273258	37789
Abel Equit	Individual	37	37	254823	
ABI SAYON		0	0	510056	
Adam Brock	Individual	40	41	254496	
ADRIENNE FORS		0	0	510044	

Grouped view · 33 groups. Group keys on the left, blue Sum of... columns on the right.

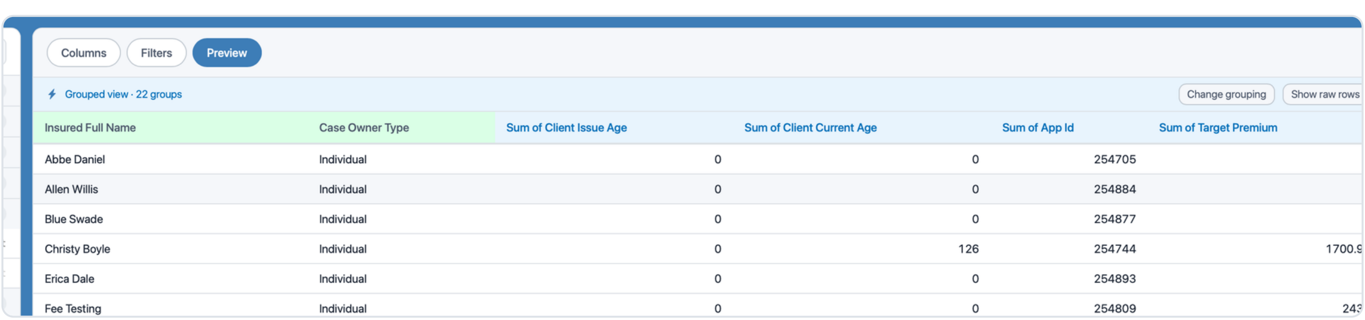
11 Confirm what the filter changed

DO THIS

1. With the filter applied, preview again.
2. Compare the group count in the header.

WHY IT MATTERS

The unfiltered report returns 33 groups; with **Client Issue Age < 5** it returns 22. That difference is the answer to the question — 22 insureds with cases carrying no recorded issue age. Always read the group count as a number that means something, not as decoration.



Insured Full Name	Case Owner Type	Sum of Client Issue Age	Sum of Client Current Age	Sum of App Id	Sum of Target Premium
Abbe Daniel	Individual	0	0	254705	
Allen Willis	Individual	0	0	254884	
Blue Swade	Individual	0	0	254877	
Christy Boyle	Individual	0	126	254744	1700.9
Erica Dale	Individual	0	0	254893	
Fee Testing	Individual	0	0	254809	243

The same report filtered: Grouped view · 22 groups.

12 Run, export, and save

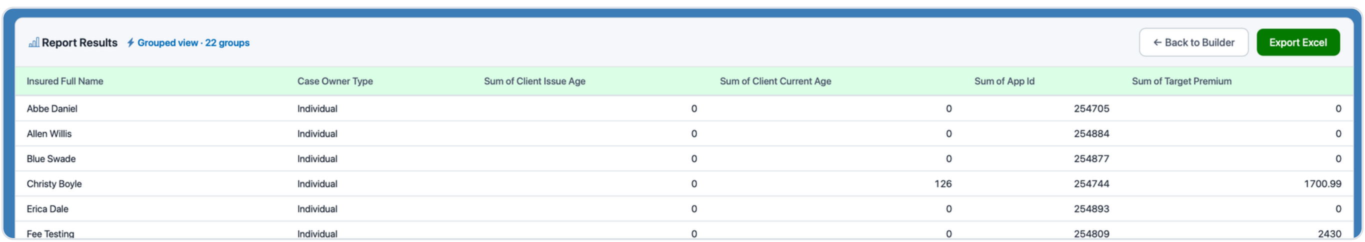
DO THIS

1. Press **Run full report** to leave the sample behind and return the complete result set on the **Report Results** screen.
2. Use **Export Excel** there to download the result.
3. Use **← Back to Builder** to return and keep editing.
4. Press **Save Report** to keep the definition for re-use.

WHY IT MATTERS

Export Excel is greyed out in the builder and live on the results screen — export what you have actually run, not what you have merely sketched. Saving is what turns a one-off answer into something the team can re-run next month.

The builder action bar. Export Excel is greyed here.



The Report Results screen, with Back to Builder and an active green Export Excel.

Button reference

What each control does and when it becomes available.

CONTROL	APPEARANCE	WHAT IT DOES
Preview	Blue, always available	Samples the result inside the builder so you can proof columns and filters.
Run full report	Green, always available	Returns the complete result set on a separate Report Results screen.
Export Excel	Greyed in the builder; green on Report Results	Downloads the result to Excel. Read as: run first, then export.
Save Report	White with a blue border	Saves the report definition so it can be re-opened later.
Set up grouping	Blue, inside the yellow prompt	Converts the row-level result into grouped totals.

CONTROL	APPEARANCE	WHAT IT DOES
Change grouping	Outline, grouped view only	Reopens the grouping choice.
Show raw rows	Outline, grouped view only	Returns the grouped result to row level.
← Back to Builder	Outline, Report Results only	Returns to the builder with your definition intact.

Field groups on the Cases object

Ten groups, 64 fields. Counts are as captured.

GROUP	FIELDS	GROUP	FIELDS
Case info	16	Agent (all agents on case)	4
Dates	6	Case Assignments	4
Premiums	7	Requirements	13
Underwriting	4	Notes	4
Client	2	Case Totals	4

Five things that go wrong

PITFALL	WHAT TO DO INSTEAD
Summing identifiers	Grouping turns every numeric column into a sum, including App Id. A nine-digit "Sum of App Id" in a stakeholder report undermines confidence in everything else on the page. Drop the column or leave the report ungrouped.
Filtering before scoping	Conditions filter within the organization scope. Set scope first, or you will tune conditions against the wrong population.
Exporting a preview	Preview is a sample. If the export button is grey, that is the system telling you the full report has not run yet.
Losing the definition	Closing the builder without pressing Save Report discards everything. If a report is worth running twice, save it.
Blank columns	A column returning mostly blanks usually means the field is not populated for the object you chose, not that the report is broken. Preview catches this.

Source fidelity

What was directly observed in the UAT captures, and what is inference.

STATUS	DETAIL
OBSERVED	Object cards, field groups and counts, the Columns / Filters / Preview tabs, chip behaviour, Sort by, organization scope, the filter row, the grouping prompt, grouped view, the action bar, and the Report Results screen.
OBSERVED	Every figure in this guide is a direct capture from the UAT session. No screen has been recreated or restyled.
INFERRED	The menu path in Step 1. The Reporting menu was never opened during capture, so no submenu item is named.
INFERRED	That Export Excel is enabled only after a full run. This is read from button styling in two screens, not from a captured click.
INFERRED	Save Report behaviour — what dialog appears and where saved reports land — was not captured.
INFERRED	The field type of Target Premium (shown as a number because it sums in the grouped view). The Premiums group was never expanded.
INFERRED	The operator list. Only **<** appears in the captures.
NOT CAPTURED	Field names inside Dates, Underwriting, Agent, Case Assignments, Requirements, Notes, Case Totals, and 5 of the 16 Case info fields.
NOT CAPTURED	The ungrouped preview after a filter is applied, and the right-most aggregate values in the 33-group view.

> Two items would close most of the remaining gaps: a capture of the **Reporting** menu open, and a capture of the **Save Report** dialog. Both are single screenshots.