

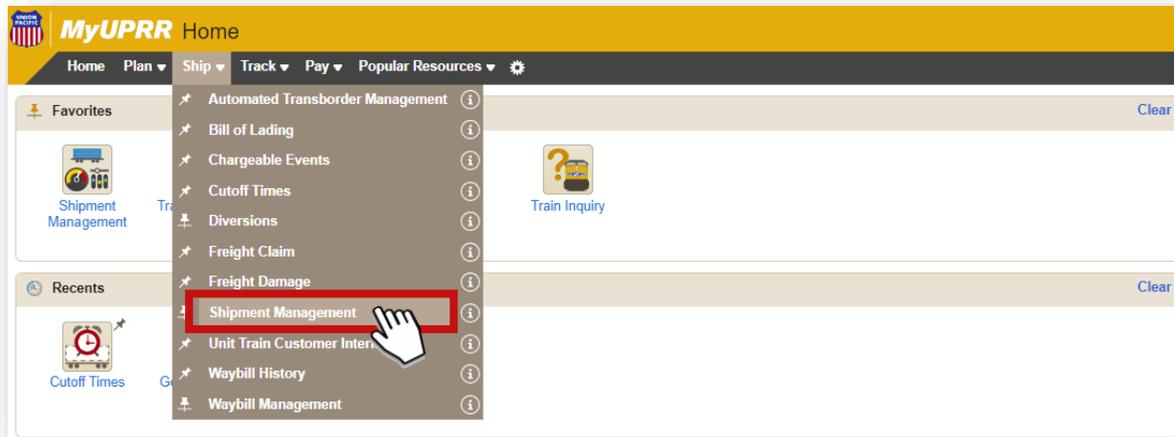


CREATING A CUSTOM REPORT FROM SCRATCH

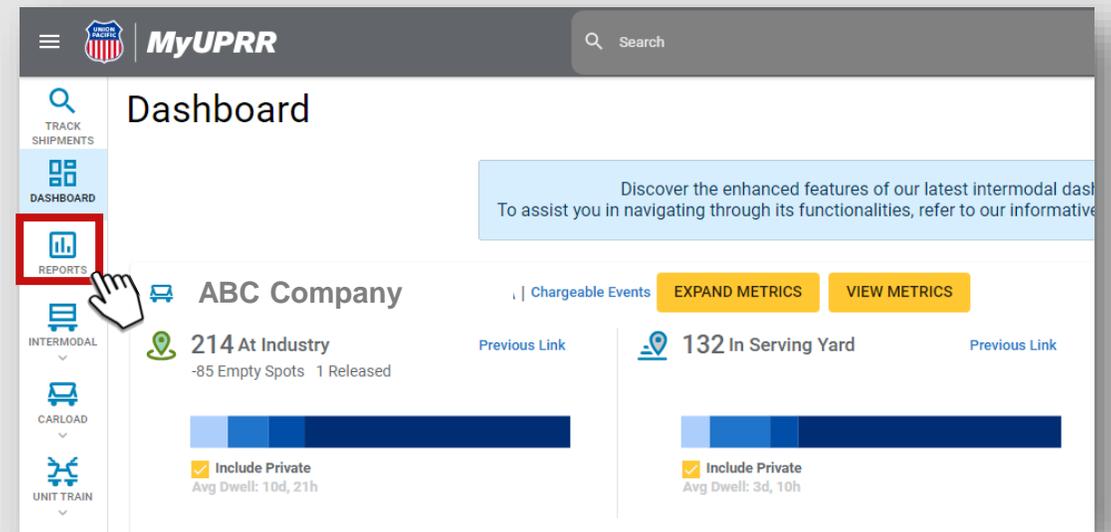
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Access Reports with Ease



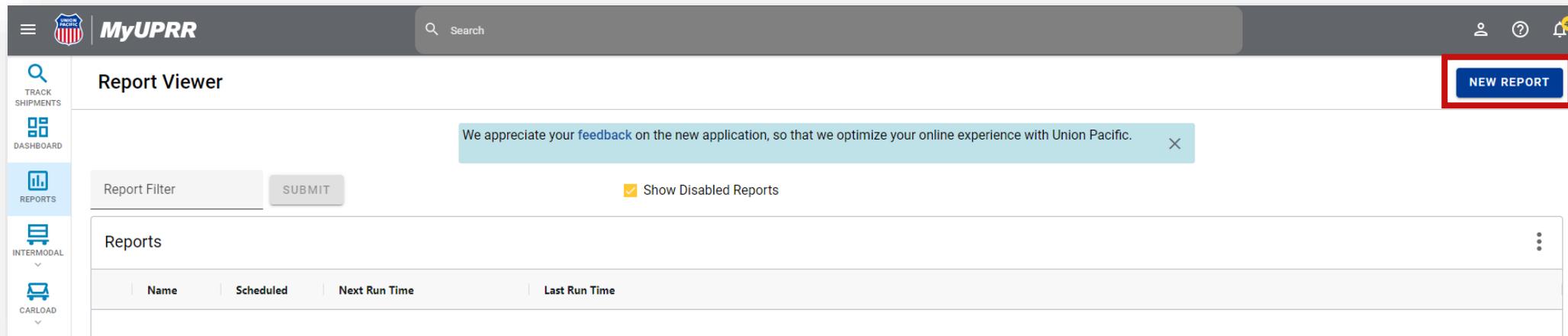
To access Reports, select **Shipment Management** on the Ship dropdown menu.



After accessing Shipment Management, navigate to **Reports** on the menu and click on it.

Creating a Custom Report

To streamline the process of creating a report, we have developed report templates that simplify the task at hand. If you can not find a template that meets your specific needs, you have the option to create a custom report from scratch.



Getting started is as easy as clicking on the **New Report** button located in the right-hand corner.

Creating a Custom Report

MyUPRR Search

Report Builder

Shipments En Route
Equipment enroute by shipper and origin.
INTERMODAL

Containers Notified <24 Hours includes Pick-up Number
Van Notified equipment dwelling less than 24 hours.
INTERMODAL

Containers Notified > 24 Hours includes Pick-up Number
Van Notified equipment dwelling more than 24 hours.
INTERMODAL

Outbound Holds
Equipment not moving due to a hold condition.
CARLOAD

Custom report
Create a report to fit your needs.

Build your own report
Get information that matters most by selecting data and display options from a menu.
DIY

- Report Builder offers the flexibility to create a custom report.
- Access the **Build Your Own Report** option located after the report templates.

Creating a Custom Report

MyUPRR

Report Builder

Report name will be:
OCSM298 - 03/18/24 08:46

Columns will be:
No columns selected

Is filtered by:
No filter fields selected

Is grouped by:
No grouping fields selected

- Experience a guided process where you will be prompted with questions to determine the data and presentation of your report.
- Select the **Edit** button next to the first question to begin creating your report.



Please note that not all steps are mandatory, but narrowing down your data can significantly enhance your data consumption process.

Report Title

Report name will be:
My Personalized Report EDIT

Report Name
My Personalized Report ×

22 of 128 Characters

Enter a name for your new report.

NEXT

➔ Click **NEXT** to move on to the next item.

Column Selection

Unlock a wealth of options with over 200 available columns!

The screenshot displays a user interface for column selection. On the left, a panel titled "Columns will be:" shows "No columns selected" and a "Categories" dropdown menu set to "All". Below it is a "Search available fields" input box. A large grey arrow points from this panel towards the main interface. The main interface is divided into two columns: "Available Columns" and "Selected Columns". The "Available Columns" list includes: AAR Car Kind, AAR Pool Number, Account of (Destination) City, Account of (Destination) City-State, Account of (Destination) Firm Number, Account of (Destination) Party Name, Account of (Destination) State, Account of (Origin) City, Account of (Origin) City-State, and Account of (Origin) Firm Number. Between the two columns are two arrows: a right-pointing arrow (highlighted with a yellow box) and a left-pointing arrow (highlighted with a blue box). The "Selected Columns" section is currently empty. At the top right of the interface is an "EDIT" button. At the bottom right are "PREVIOUS" and "NEXT" buttons, with "NEXT" highlighted by a red box.

- Narrow down the available columns by utilizing the **Categories** list for filtering.
- Quickly find specific columns by typing in the **Search** box.

Select the desired column name under **Available Columns** and move it to the **Selected Columns** section by clicking this arrow.

Remove unwanted columns by selecting the name you no longer want under **Selected Columns** and click the arrow to move it back to the **Available Columns** list.

➔ Click **NEXT** to move on to the next item.



Report Filters

Filtering data allows you to focus on specific subsets of information that are relevant to your analysis.

- Select a category to help quickly narrow down your options.
- Click into the filter field to view the options for the chosen category.
- Enter your desired filter criteria in the free form fields. Utilize the “includes”, “excludes”, “contains”, etc. to refine the report results.

In the example: We want to see shipments consigned to ABC Company in Omaha, NE.

Click **NEXT** to move on to the next item.

Is filtered by:

- Destination City-State is Omaha-NE [Includes]
- Consignee Name is ABC COMPANY [Includes]

Categories
Parties

Filter

Consignee Name

Includes
 Excludes
 Contains
 Not Contains

ABC Company
Filter by free form text

Destination City-State

Includes
 Excludes
 Contains
 Not Contains

Omaha, NE
Enter a city name, a state abbreviation, or a "city name, state abbreviation" combination

Report Grouping

When creating a report, grouping data allows you to organize and summarize information based on common characteristics or attributes.

Is grouped by:
Beneficial Owner Name
Last Accomplished Event

Categories
All

Columns

Click on column selections and drag to change order.

Beneficial Owner Name

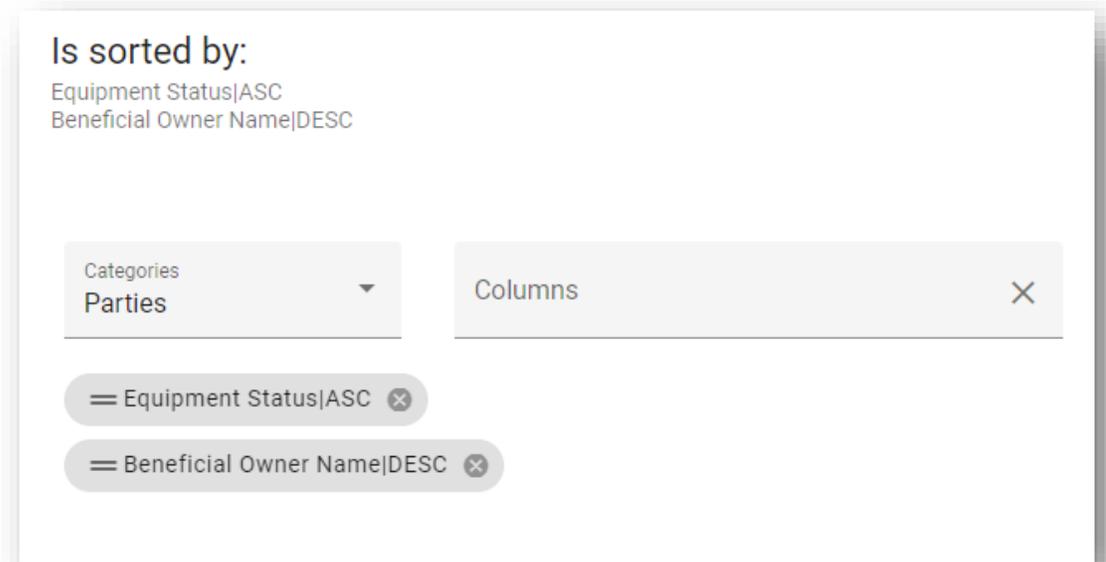
Last Accomplished Event

- Select a category to help quickly narrow down your options.
- Click into the columns field to view the options for the chosen category.
- Arrange the grouping hierarchy by clicking on your selection and drag to change the order.
- Click **NEXT** to move onto the next item.

Report Sorting

Sorting data allows you to arrange the information in a specific order based on one or more criteria.

- Select a category to help quickly narrow down your options.
- Click into the columns field to view the options for the chosen category.
- Choose the sort order, either ascending (ASC) or descending (DESC).
- Arrange the grouping hierarchy by clicking on your selection and drag to change the order.
- Click **NEXT** to move onto the next item.



Scheduling Your Report

The screenshot shows the 'Report Builder' interface for 'Inbound to Industry Standard Report'. It includes a sidebar with navigation icons for TRACK SHIPMENTS, DASHBOARD, REPORTS, INTERMODAL, CARLOAD, UNIT TRAIN, and EN ROUTE TO INTERCHANGE. The main content area has a search bar and a progress indicator with three steps: 'Who is the receiver?', 'What would you like to name your report?' (Optional), and 'Would you like to schedule your report?' (Optional). The scheduling section is titled 'Select Days' and features a 'Days of Week' row with buttons for SUN, MON, TUE, WED, THU, FRI, and SAT. A dropdown menu is open, showing 'Weekdays', 'Everyday', and 'Custom' options. A red box highlights the 'Weekdays' option, and a red arrow points from it to the 'MON' button. Below the days are fields for 'Send Every' (a dropdown), 'End Time' (a dropdown), 'User Id' (with 'Your User ID' as a placeholder), and 'Email' (with 'Your Email Address' as a placeholder). A 'SUBMIT' button is at the bottom.

Here are some useful tips to consider when scheduling your report:

- When selecting the days of the week, you have three options to choose from:
 - Weekdays
 - Everyday
 - Custom
- Selecting weekdays or everyday will automatically check the corresponding days.
- If you opt for the custom option, you will need to manually select the specific days of the week.

Scheduling Your Report

The screenshot shows the 'MyUPRR' web application interface. The main heading is 'Report Builder' for an 'Inbound to Industry Standard Report'. The user is prompted to answer questions to build the report. The third question, 'Would you like to schedule your report?', is selected. Below this question, there are several configuration options: 'Select Days' is set to 'Weekdays'; 'Days of Week' has checkboxes for MON, TUE, WED, THU, and FRI checked, while SUN and SAT are not; 'Start Time', 'Send Every', and 'End Time' are highlighted with a red box; 'Format' is set to 'CSV'; 'User Id' is 'Your User ID'; and 'Email' is 'Your Email Address'. A 'SUBMIT' button is at the bottom.

- Select the desired time for receiving your report. The following are two common scenarios:

1. To receive the report once a day:

- Start Time = the time you want to receive the report (e.g., 8:00 AM)
- Send Every = 24 hours
- End Time = the time you want to receive the report (e.g., 8:00 AM)

2. To receive the report multiple times a day:

- Start Time = the time you want to start receiving reports (e.g., 8:00 AM)
- Send Every = the hours between reports (e.g., 4 hours)
- End Time = the time you want to stop receiving reports (e.g., 5:00 PM)

Scheduling Your Report

The screenshot shows the 'Report Builder' interface for 'MyUPRR'. The main heading is 'Inbound to Industry Standard Report'. Below this, it says 'Please answer some questions to help build your report.' There are three numbered steps: 1. 'Who is the receiver?' (completed), 2. 'What would you like to name your report?' (Optional, completed), and 3. 'Would you like to schedule your report?' (Optional, current step). Under step 3, there are several input fields: 'Select Days' (set to 'Weekdays'), 'Days of Week' (radio buttons for SUN, MON, TUE, WED, THU, FRI, SAT, with MON-FRI selected), 'Start Time', 'Send Every', 'End Time', 'Format' (set to 'CSV'), 'User Id' (placeholder 'Your User ID'), and 'Email' (placeholder 'Your Email Address'). A 'SUBMIT' button is located at the bottom of the form. The 'Format' dropdown and the 'SUBMIT' button are highlighted with red boxes.

- Choose the desired format for receiving the report:
- CSV
- HTML
- EXCEL

- Your user ID and email address will automatically populate in the corresponding fields.

- Once you have made your selection, click on the **SUBMIT** button to proceed.

Reviewing Your Report Selections

If you wish to make any changes, select the **EDIT** option in the corresponding section.

The screenshot displays the 'Report Builder' interface in the MyUPRR system. The top navigation bar includes the MyUPRR logo, a search bar, and user profile icons. The left sidebar contains navigation options: TRACK SHIPMENTS, DASHBOARD, REPORTS (highlighted), INTERMODAL, CARLOAD, UNIT TRAIN, and EN ROUTE TO INTERCHANGE. The main content area is divided into four sections, each with an 'EDIT' button:

- Report name will be:** Inbound to Industry
- Columns will be:** Equipment ID, Load/Empty, System Car Kind, Commodity Description, Shipper Name, Origin City-State, Equipment Status, Last Accomplished Event, Train ID, Last Accomplished Event Road, Last Accomplished Event City-State, Last Accomplished Event Date/Time, Estimated Time of Arrival Date/Time
- Is filtered by:** Status is Inactive [Excludes], Last Accomplished Event Date/Time is 8760 hours [Less than]
- Is grouped by:** Consignee Name

At the bottom of the interface, there are four buttons: BACK, PREVIEW, SAVE, and SAVE AND CLOSE. A red arrow points from the text above to the 'EDIT' button in the 'Report name will be:' section. Another red arrow points from the text above to the 'EDIT' button in the 'Columns will be:' section. A third red arrow points from the text above to the 'EDIT' button in the 'Is filtered by:' section. A fourth red arrow points from the text above to the 'SAVE AND CLOSE' button.

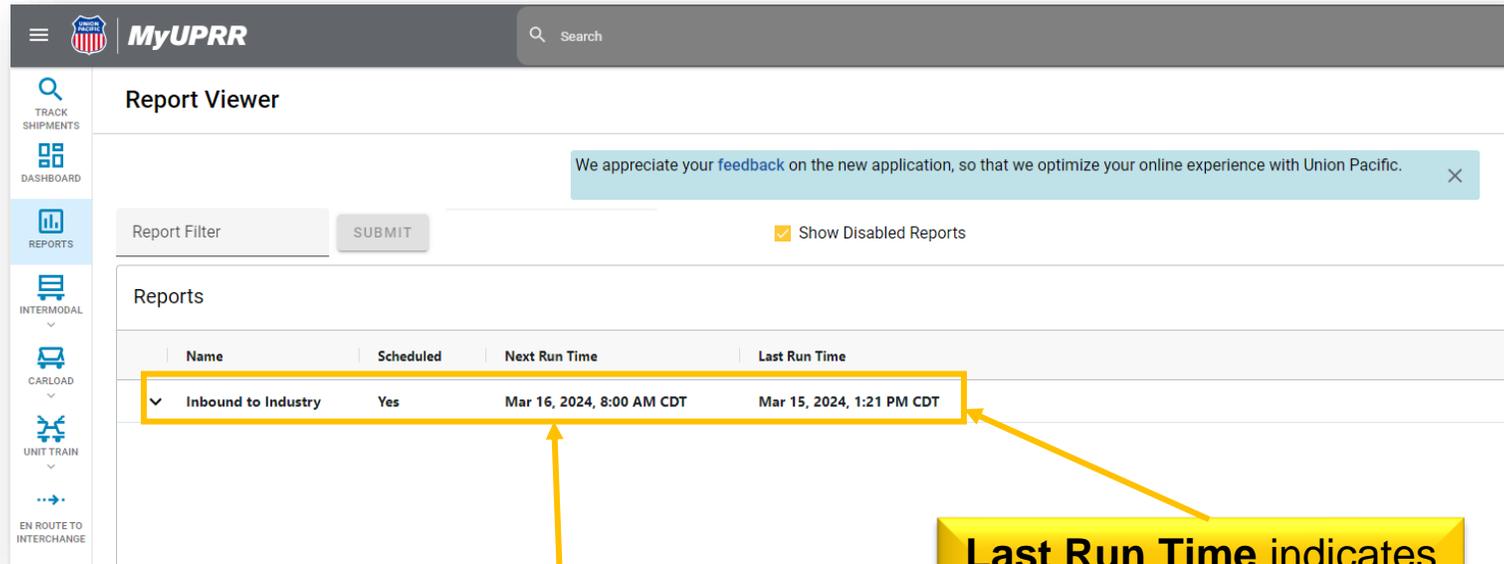
Click the **BACK** button to navigate to the previous page.

Click on the **PREVIEW** button to display a preview of the report before running or generating it. This allows you to preview the layout, formatting, and data to ensure it meets your expectations.

Click the **SAVE** button to save your report, preserving all the selected settings and configurations.

Click on the **SAVE AND CLOSE** button to save your report and close the editing interface. You will be directed back to the main Reports page.

Report Creation Success!



Next Run Time shows the date and time when the next scheduled run of the report will occur.

Last Run Time indicates the date and time when the report was last generated.

Congratulations on successfully creating your report!

You can now find your report conveniently listed on the Report Viewer page.

This page serves as a central hub where you can easily access and manage your reports.

Understanding the Report Viewer

The screenshot shows the MyUPRR Report Viewer interface. A blue callout box points to the 'Report Filter' input field, stating: 'Find reports easily by entering characters from the report name and submit.' A green callout box points to the 'Show Disabled Reports' checkbox, stating: 'Uncheck box to remove the disabled reports from your view.' A red callout box highlights the action menu for the 'Inbound to Industry' report, listing: RUN, CLONE, EDIT, PREVIEW, DISABLE, and DELETE.

Report Viewer

Report Filter [SUBMIT]

Show Disabled Reports

Name	Scheduled	Next Run Time	Last Run Time
▼ Inbound to Industry	Yes	Mar 16, 2024, 8:00 AM CDT	Mar 15, 2024, 1:21 PM CDT

- RUN
- CLONE
- EDIT
- PREVIEW
- DISABLE
- DELETE

By clicking the dropdown arrow next to the report name, a list of actions will appear. Here's a breakdown of the actions you can perform:

Run: Manually execute the report, and the results will be delivered directly to your email.

Clone: Share a copy of the report with your co-workers.

Edit: Make changes to your existing report.

Preview: display a preview of the report before running or generating it.

Disable/Enable: If you no longer wish to receive automated delivery of the report, you can choose to disable it. Conversely, selecting enable will resume the automated delivery.

Delete: If you no longer require the report, you have the option to permanently delete it. Please exercise caution when using this action, as it cannot be undone.