

INTRODUCTION

This QRC provides guidance on changing the data source of a report from one universe to another universe in ACE Reports. This allows you to use an existing report to query data from a new universe instead of recreating the report entirely. The **Change Source Wizard** guides you through selecting a new universe and mapping the report's current data objects to data objects available in the new universe.

OPEN A SAVED REPORT FROM MY DOCUMENTS

1. From the ACE Reports landing page, select the Documents tab.



2. Under My Documents or applicable shared folder, locate the saved report.



3. Open the report.

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ACE Reports – Change Data Source



Change the Data Source of Report

- 1. Navigate to and open a saved report.
- 2. Select the **Design** button to toggle from **Reading** to **Design** mode.
- 3. Select the Data Access tab.



Report Elements

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- 4. Select the **Tools** subtab.
- 5. In the **Tools** subtab, select the **Change Source** drop-down menu.

The query(s) associated with the report will display.

6. Select the query to change data source.

The Change Source Wizard dialog box displays.

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Change Source Change	Change Data Source f Select another data source - an existing da	ta source in the document or a new data source	
Details 1/14/2020	Select an option		
	Choose an existing data source from the sou	e document	
	Name	Type	
	ntry Summary [unx]	Universe	
	Specify a new data source ③ Select a data source •		
	Apply changes in all queries sharing the sa	ime data source.	

7. In the Select an option section, select the Specify a new data source radio button.

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8. In the Select a data source drop-down menu, select Universe.

The **Universe** dialog box displays.

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9. In the **Universe** dialog box, select the universe to use as the new data source.

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	Select a universe for the query.		
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	(2) Help on selected universe:		
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- 10. Select OK.
- 11. In the Change Source Wizard dialog box, select Next.

The Strategy Selection will open.

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![](_page_3_Picture_8.jpeg)

![](_page_3_Picture_11.jpeg)

![](_page_4_Picture_1.jpeg)

- 12. In the Strategy Selection section, in the Available strategies column,
  - a. Select Same name.
  - b. Select the right arrow.

Same name moves to the Selected strategy order column.

Change Source Wizard		2 ×
Strategy Selection Select the strategies to use for mapping object	ts between the source and target data	sources
Available strategies Same name Removal	Selected strategy order Same Id Same technical name Same path Closest name	L Dov

13. Select the arrow to move **Same name** to the **Selected strategy order** column.

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Strategy Selection Select the strategies to use for mapping objects b	between	the source and target data sources	Â	
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14. Use the **Up** and **Down** buttons to change the priority of methods to map data objects from the current universe to the new universe.

![](_page_4_Picture_10.jpeg)

NOTE: The recommended order is: Same Id, Same technical name, Same path, Same name, Closest name.

![](_page_4_Picture_12.jpeg)

![](_page_4_Picture_15.jpeg)

## ACE Reports – Change Data Source

![](_page_5_Picture_1.jpeg)

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![](_page_5_Picture_3.jpeg)

**IMPORTANT**: The **Object Mapping** section displays the name of each data object in the current report query and the new universe data object that will replace it.

(Finish) Cancel

If the new universe is an updated version of the current universe, the automated mapping should match all objects. If the data objects do not match, the a icon appears. Hover over this icon for additional information on the best recommended data object in the new universe.

![](_page_5_Picture_6.jpeg)

![](_page_5_Picture_9.jpeg)

## ACE Reports - Change Data Source

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16. After all data objects are mapped, select the **Finish** button.

The reports **Query Panel** displays with the new universe.

![](_page_6_Picture_4.jpeg)

- 17. In the **Close** drop-down menu, select **Apply Changes and Close.**
- 18. Save the report.

![](_page_6_Picture_7.jpeg)

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![](_page_6_Picture_8.jpeg)

![](_page_6_Picture_9.jpeg)

![](_page_6_Picture_12.jpeg)