

Updated as of
April 05, 2021



KURVE

Kurve Admin User Guide Version 1.13



Table of Contents

INTRODUCTION	3
INTRODUCTION TO THE KURVE DASHBOARD.....	3
1. Navigating to the Kurve Dashboard.....	3
2. Getting to know the Kurve Home Page	4
3. Adding and Removing Favorites from your Favorites Menu	5
GRAPHS OVERVIEW.....	10
1. Navigating the Graphs Overview Portal.....	10
2. Using Graph Action Buttons.....	11
3. Using a Specific Graph's Toolbar.....	22
4. Advanced Graph Filtering.....	25
5. Refresh Data	38
6. Showing/Hiding Series	38
7. Printing and Downloading Graphs.....	38
8. Clicking and Highlighting on Graphs to Zoom	39
9. Navigating Through Graph Data	41
REPORTS PORTAL	48
1. Navigating the Reports Portal.....	48
2. Using Report Action Buttons	49
3. Using a Specific Report's Toolbar	52
4. Edit Query Filters.....	53
5. Refresh Data	54
6. Adding Columns on Report	55
7. Personalizing Columns on the Report	65
8. Reorganizing Columns on the Report	76
9. Formatting Number Columns.....	89
CREATE A GRAPH.....	99
1. Selecting a Graph Source.....	99
2. Creating a Graph from a Query or Report	99
2.A. Creating a Graph from a Query	100
2.B. Creating a Graph from a Kurve Report.....	102
3. Create Query Filters.....	103
4. Naming the Graph and selecting the Graph Type	106

5. Filling in Query Filters	108
6. Selecting the Graph Settings.....	110
CREATE A REPORT	144
1. Selecting the Report Record Type	144
2. Creating the Report from a Query	144
3. Create Query Filters.....	146
4. Naming the Report	149
5. Click “Create Report.”	149
6. Enter Query Filter value(s)	150
7. Personalizing / Re-organizing the Columns on the Report	151
Admin Portal	152
1. Getting to know the Kurve Admin Dashboard.....	152
2. Admin Portal	153
3. Using Graph Actions.....	153
4. Delete Records:.....	155
5. Re-assign Records:	155
6. Copy, Get Portal URL, Share	158
7. Restore Deleted Graphs and Reports.....	158
8. Reattach Graphs to Reports	162
9. Manage Color Templates	166
10. Generate IDs	170
11. Find Duplicates	172
12. Manage Favorites.....	174
APPENDIX.....	177
1. Appendix A: Kurve Custom Column Functions.....	177
2. Appendix B: Custom Column Types – Color & Text.....	182

INTRODUCTION

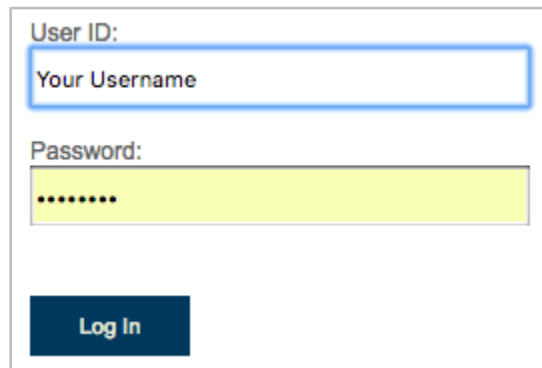
Welcome to the Kurve User Guide!

This document will guide you through the functions of Kurve and its data reporting features.

INTRODUCTION TO THE KURVE DASHBOARD

1. Navigating to the Kurve Dashboard

- a. Log in to TRIRIGA. Type in your username and password on the login page and click “Log In.”



Note: Your TRIRIGA admin will give you a Kurve URL to access the Kurve Dashboard. Generally, Kurve can be accessed through the following URL:

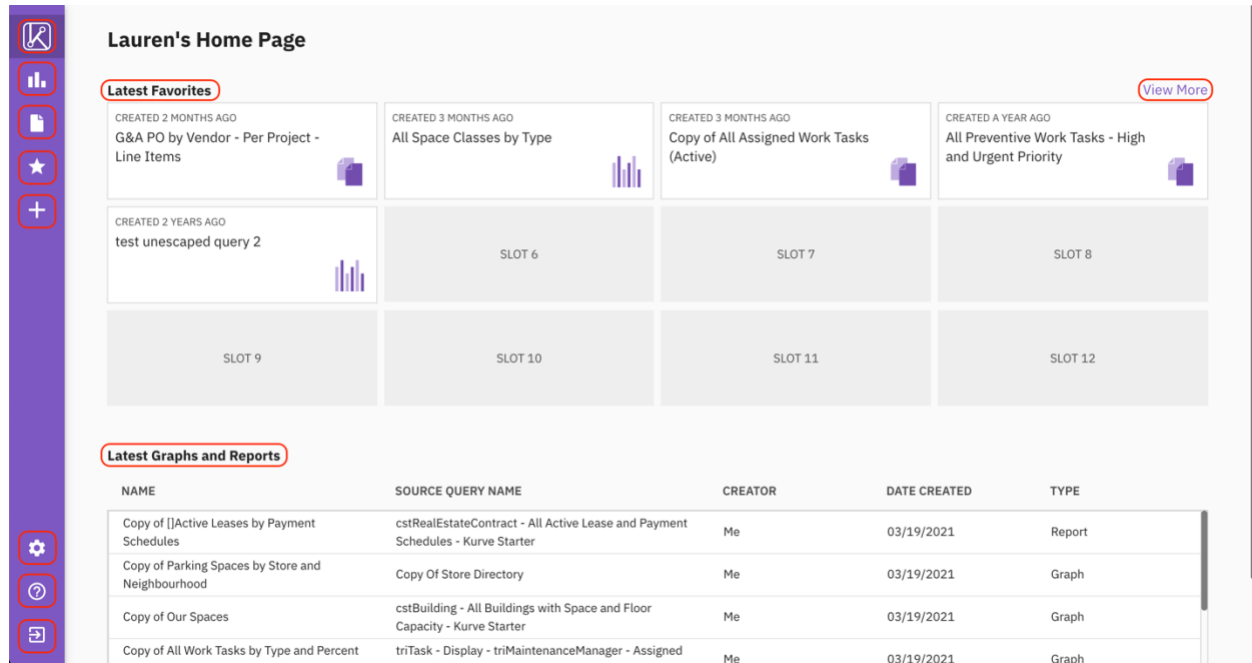
[YOUR TRIRIGA URL]/p/web/Kurve

For example, if you log in to TRIRIGA at <https://example.tririga.com>, your Kurve URL would be:

<https://example.tririga.com/p/web/Kurve>




2. Getting to know the Kurve Home Page

- a. This is your Kurve Home Page. You should see something similar upon opening the application.



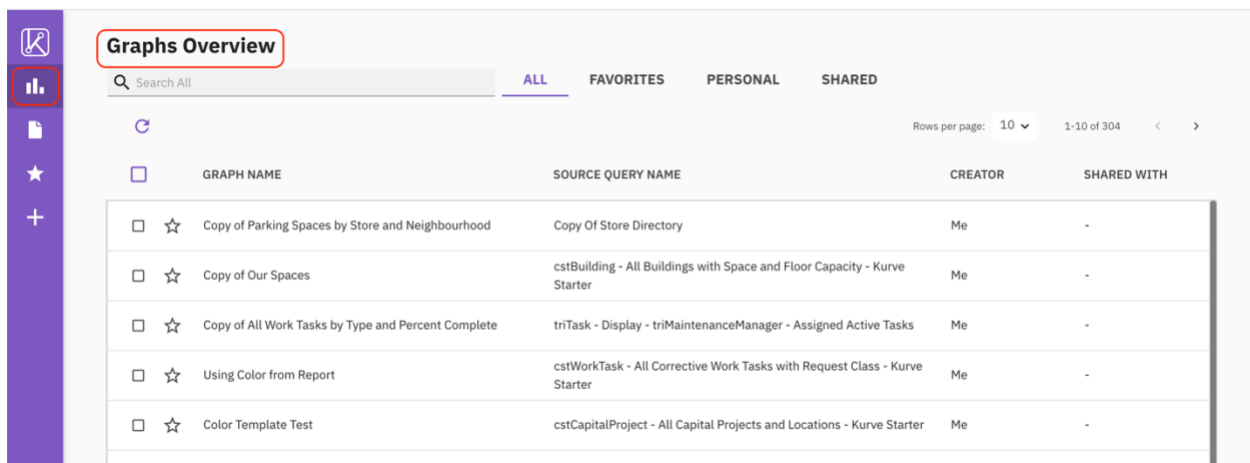
- b. Features and functions of the Kurve Dashboard:

	Home Page	Click on this icon to access your Kurve Home Page. Here you can view your latest 12 favoured graphs and reports, and the latest graphs and reports created by you or shared with you.
	Graphs Overview	Click on this icon to access your Graphs Overview - all graphs that have been created or shared with you will be stored here.
	Reports Overview	Click on this icon to access your Reports Overview - all reports that have been created or shared with you will be stored here.
	My Favourites	Click on this icon to view a list of all your favoured Kurve Graphs and Reports in list format.
	Create	Click on this icon to create a new record - decide between a graph or report and <i>let your data tell the story!</i>

-	Favorites	Pin your favorite reports and graphs for easy access.
-	Latest Graphs and Reports	The most recent graphs and reports you have created.
-	View More	Click to view a list of all of your favourites.
	Admin Portal	Easily access the admin portal by clicking here.
	Help/Support	Easily access support resources.
	Logout	Logout of TRIRIGA and Kurve

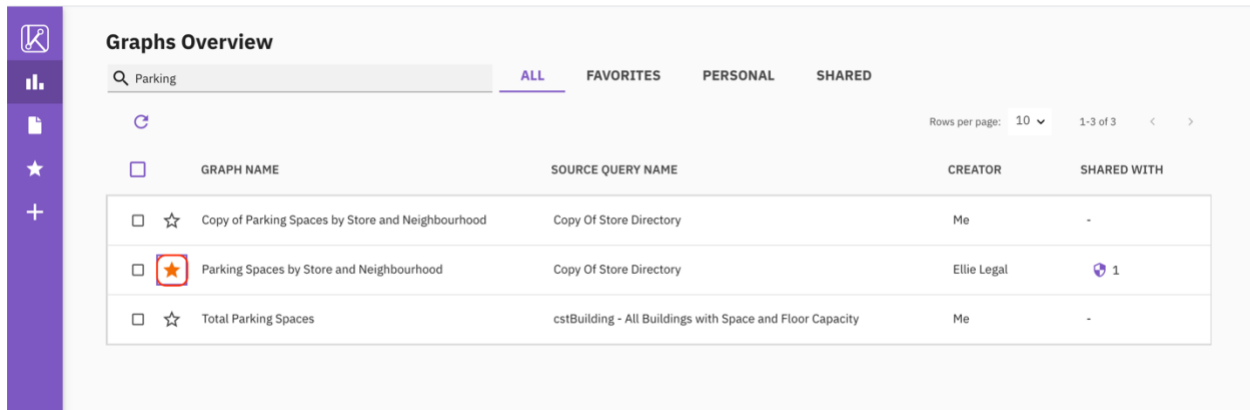
3. Adding and Removing Favorites from your Favorites Menu

- a. You are able to **favorite** graphs/reports for easy access on the Kurve dashboard. Please note, only the 12 latest created will appear on the home page. There are two methods are favouriting:
 - i. From the Overview Page:
 - Navigate to the Graphs or Reports Overview Page



The screenshot displays the 'Graphs Overview' page in the Kurve Admin interface. The page has a purple sidebar on the left with navigation icons. The main content area has a header with 'Graphs Overview' and a search bar. Below the header, there are tabs for 'ALL', 'FAVORITES', 'PERSONAL', and 'SHARED'. The 'ALL' tab is selected. A table lists the graphs with columns: GRAPH NAME, SOURCE QUERY NAME, CREATOR, and SHARED WITH. The first graph is 'Copy of Parking Spaces by Store and Neighbourhood' with source query 'Copy Of Store Directory' and creator 'Me'. The second graph is 'Copy of Our Spaces' with source query 'cstBuilding - All Buildings with Space and Floor Capacity - Kurve Starter' and creator 'Me'. The third graph is 'Copy of All Work Tasks by Type and Percent Complete' with source query 'triTask - Display - triMaintenanceManager - Assigned Active Tasks' and creator 'Me'. The fourth graph is 'Using Color from Report' with source query 'cstWorkTask - All Corrective Work Tasks with Request Class - Kurve Starter' and creator 'Me'. The fifth graph is 'Color Template Test' with source query 'cstCapitalProject - All Capital Projects and Locations - Kurve Starter' and creator 'Me'. Each graph row has a checkbox and a star icon to its left.

- Search for the graph you would like to favourite. Then find the graph row and click the Star icon. The icon will turn yellow indicating it has been starred.



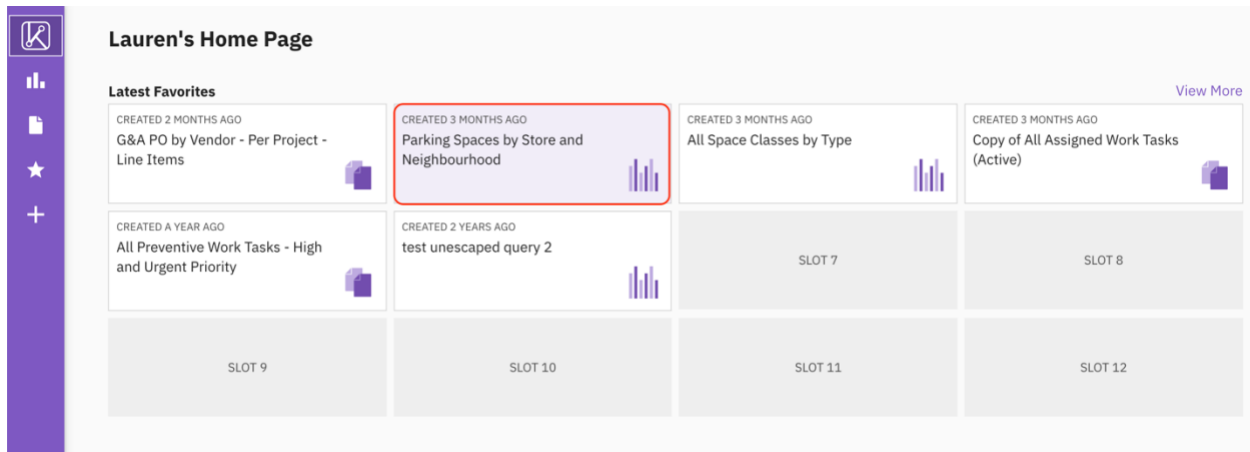
Graphs Overview

Search: Parking | **ALL** | FAVORITES | PERSONAL | SHARED

Rows per page: 10 | 1-3 of 3

GRAPH NAME	SOURCE QUERY NAME	CREATOR	SHARED WITH
Copy of Parking Spaces by Store and Neighbourhood	Copy Of Store Directory	Me	-
Parking Spaces by Store and Neighbourhood	Copy Of Store Directory	Ellie Legal	1
Total Parking Spaces	cstBuilding - All Buildings with Space and Floor Capacity	Me	-

- Navigate back to your home page to view it in your list of favourites.

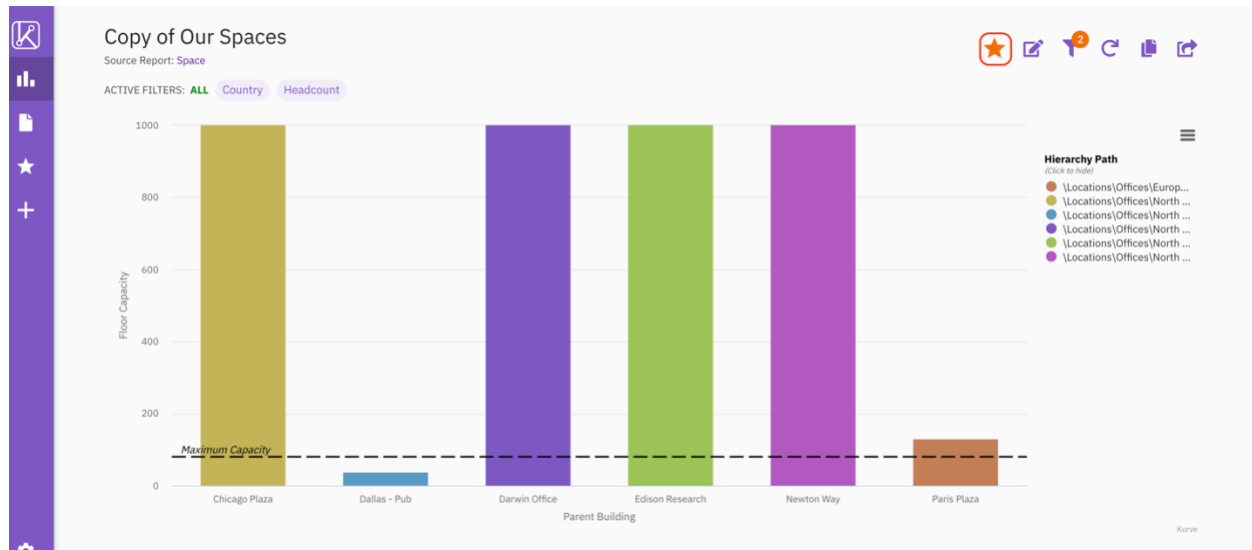


Lauren's Home Page

Latest Favorites [View More](#)

<p>CREATED 2 MONTHS AGO</p> <p>G&A PO by Vendor - Per Project - Line Items</p>	<p>CREATED 3 MONTHS AGO</p> <p>Parking Spaces by Store and Neighbourhood</p>	<p>CREATED 3 MONTHS AGO</p> <p>All Space Classes by Type</p>	<p>CREATED 3 MONTHS AGO</p> <p>Copy of All Assigned Work Tasks (Active)</p>
<p>CREATED A YEAR AGO</p> <p>All Preventive Work Tasks - High and Urgent Priority</p>	<p>CREATED 2 YEARS AGO</p> <p>test unescaped query 2</p>	SLOT 7	SLOT 8
SLOT 9	SLOT 10	SLOT 11	SLOT 12

- From within a Graph or Report: Open the graph or report you would want to favourite.
 - Within the action items, select the star icon.



- b. View Favourites: Your Home Page will only display 12 favourites based on the latest created date.
- If you are on the home page you can click View More on the top right hand corner of the Favourites cards.

Lauren's Home Page

Latest Favorites

CREATED AN HOUR AGO
Copy of Our Spaces

CREATED 2 MONTHS AGO
G&A PO by Vendor - Per Project - Line Items

CREATED 3 MONTHS AGO
Parking Spaces by Store and Neighbourhood

CREATED 3 MONTHS AGO
All Space Classes by Type

CREATED 3 MONTHS AGO
Copy of All Assigned Work Tasks (Active)

CREATED A YEAR AGO
All Preventive Work Tasks - High and Urgent Priority

CREATED 2 YEARS AGO
test unescaped query 2

SLOT 8

SLOT 9

SLOT 10

SLOT 11

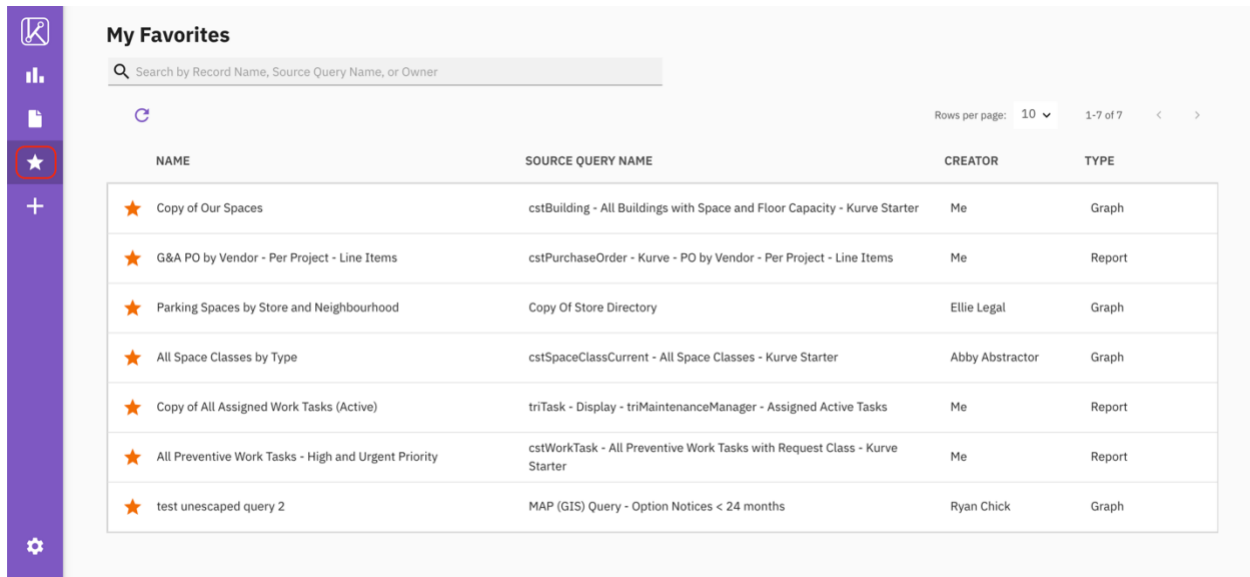
SLOT 12

[View More](#)

Latest Graphs and Reports

NAME	SOURCE QUERY NAME	CREATOR	DATE CREATED	TYPE
Copy of [Active Leases by Payment Schedules	cstRealEstateContract - All Active Lease and Payment Schedules - Kurve Starter	Me	03/19/2021	Report
Copy of Parking Spaces by Store and Neighbourhood	Copy Of Store Directory	Me	03/19/2021	Graph

- You can also use the Favourites icon on the side navigation bar to open the list of your favourites



My Favorites

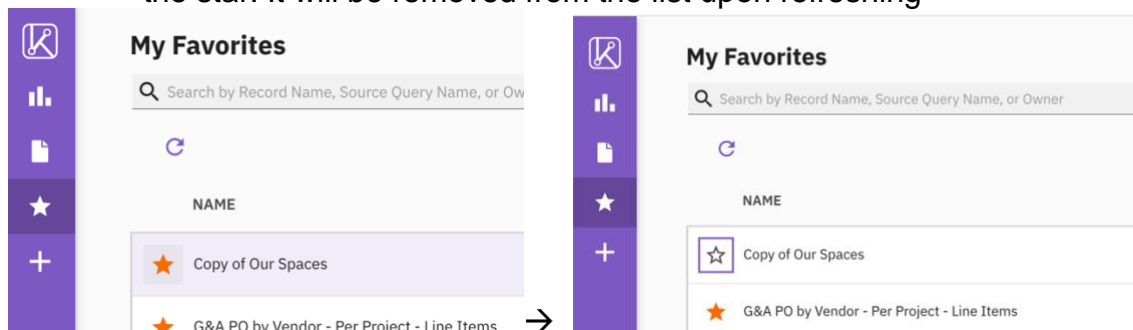
Search by Record Name, Source Query Name, or Owner

Rows per page: 10 1-7 of 7

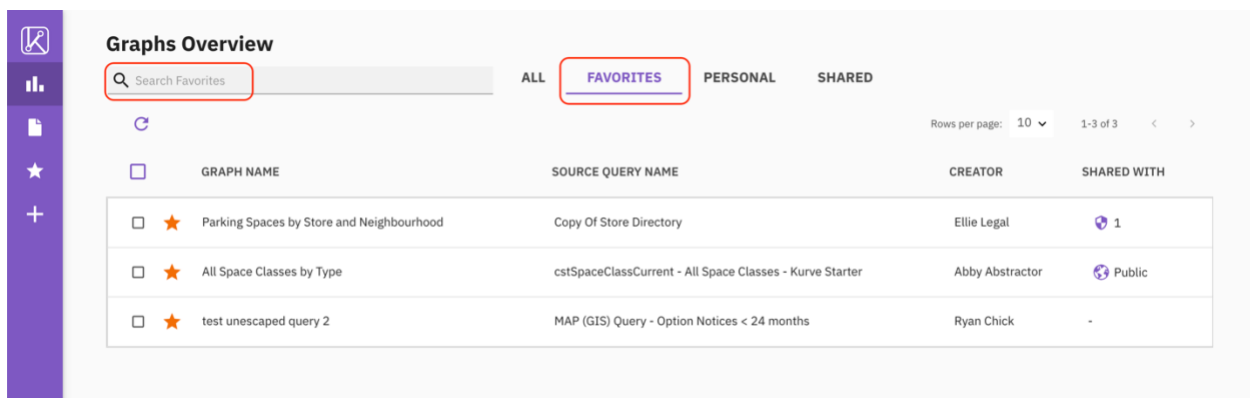
NAME	SOURCE QUERY NAME	CREATOR	TYPE
★ Copy of Our Spaces	cstBuilding - All Buildings with Space and Floor Capacity - Kurve Starter	Me	Graph
★ G&A PO by Vendor - Per Project - Line Items	cstPurchaseOrder - Kurve - PO by Vendor - Per Project - Line Items	Me	Report
★ Parking Spaces by Store and Neighbourhood	Copy Of Store Directory	Ellie Legal	Graph
★ All Space Classes by Type	cstSpaceClassCurrent - All Space Classes - Kurve Starter	Abby Abstractor	Graph
★ Copy of All Assigned Work Tasks (Active)	triTask - Display - triMaintenanceManager - Assigned Active Tasks	Me	Report
★ All Preventive Work Tasks - High and Urgent Priority	cstWorkTask - All Preventive Work Tasks with Request Class - Kurve Starter	Me	Report
★ test unescaped query 2	MAP (GIS) Query - Option Notices < 24 months	Ryan Chick	Graph

c. Removing favorites: There are a few ways to remove a favourite

i. My Favourites Page: find the record you wish to unfavourite and click in the star. It will be removed from the list upon refreshing



ii. Overview Pages: search or navigate to the favourites tab to find the record you wish to unfavourite.



Graphs Overview

Search Favorites

ALL **FAVORITES** PERSONAL SHARED

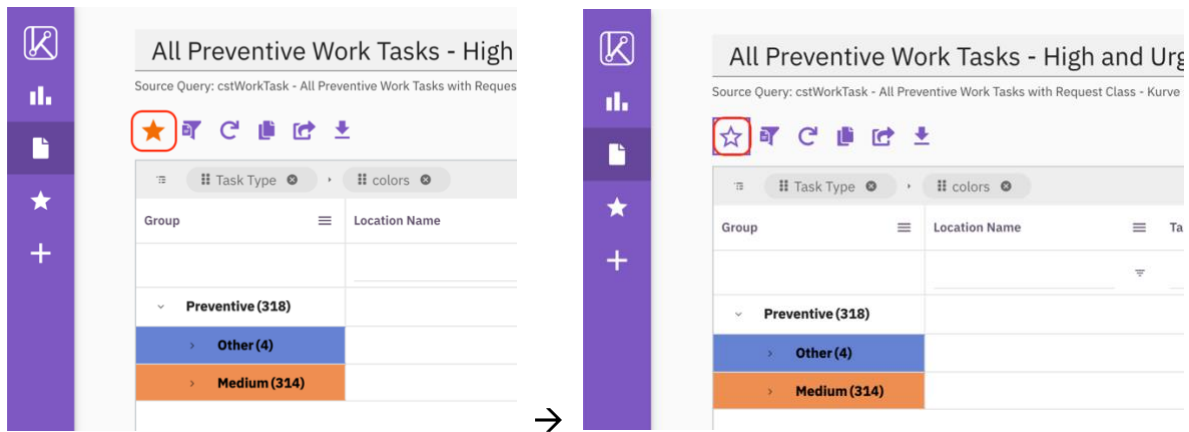
Rows per page: 10 1-3 of 3

GRAPH NAME	SOURCE QUERY NAME	CREATOR	SHARED WITH
☐ ★ Parking Spaces by Store and Neighbourhood	Copy Of Store Directory	Ellie Legal	👤 1
☐ ★ All Space Classes by Type	cstSpaceClassCurrent - All Space Classes - Kurve Starter	Abby Abstractor	🌐 Public
☐ ★ test unescaped query 2	MAP (GIS) Query - Option Notices < 24 months	Ryan Chick	-


- Click the star. It will be removed from the list upon refreshing.



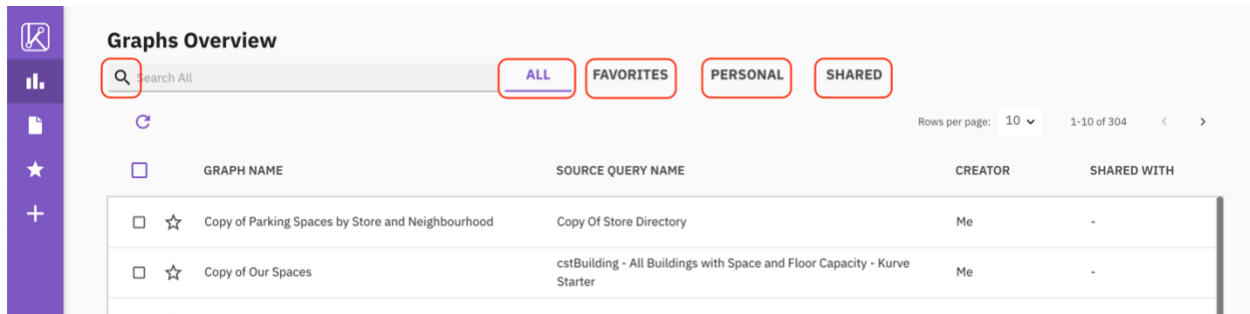
- iii. Within a graph or report: Open the record you would like to unfavourite




GRAPHS OVERVIEW

From the Kurve Dashboard, click on the Graph Icon () to access the Graphs Overview. This is where all graphs that have been created or shared with you are stored.


1. Navigating the Graphs Overview Portal

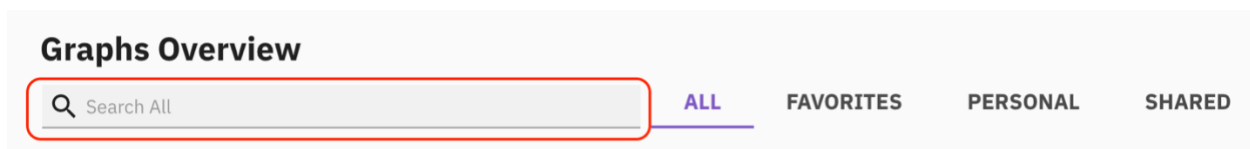


a. Features of the Graphs' menu bar:

	Search	The search function.
-	ALL	All graphs created or shared.
-	FAVORITES	All graphs you have favourited.
-	PERSONAL	Graphs personally created by you.
-	SHARED	Graphs shared to you by others.

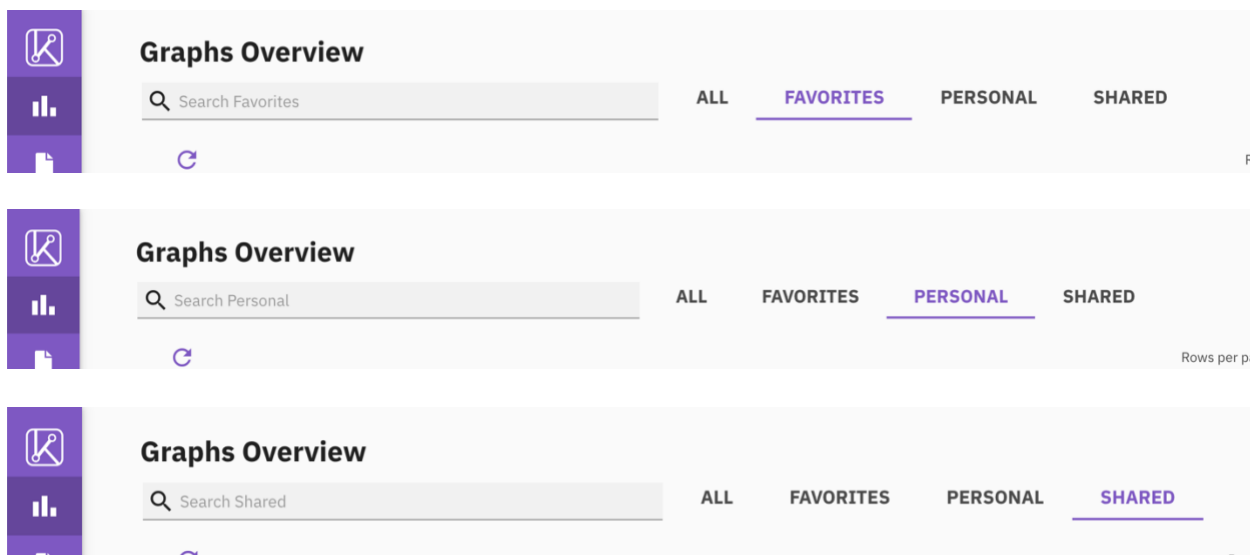
b. Functions of the Graphs' menu bar:

- Search** (): This is your search function. Click on the magnifying glass symbol to expand the search bar and type to filter through the current list of graphs.

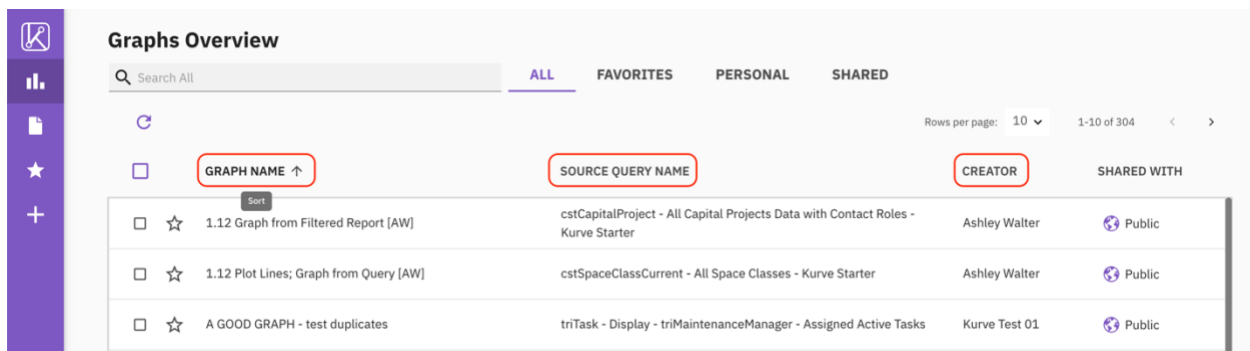


Note: By default, the list of graphs is sorted by created date, in descending order. The default search will filter through *All* Graphs in the portal.

- If you want to search within the *Personal*, *Favorites*, or *Shared* tabs, simply click on the tab and then search in the search bar.



- ii. Sort function: sort the graph results by clicking on any of the column headers. There are two sort options:
 - Arrow facing up (↑) will sort your results in alphabetical order starting from “A.”
 - Arrow facing down (↓) will sort your results in reverse alphabetical order starting from “Z.”

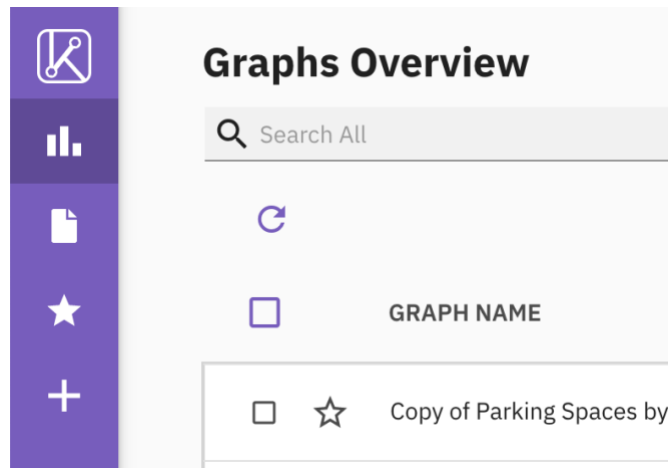


2. Using Graph Action Buttons

Personal and Shared Graphs

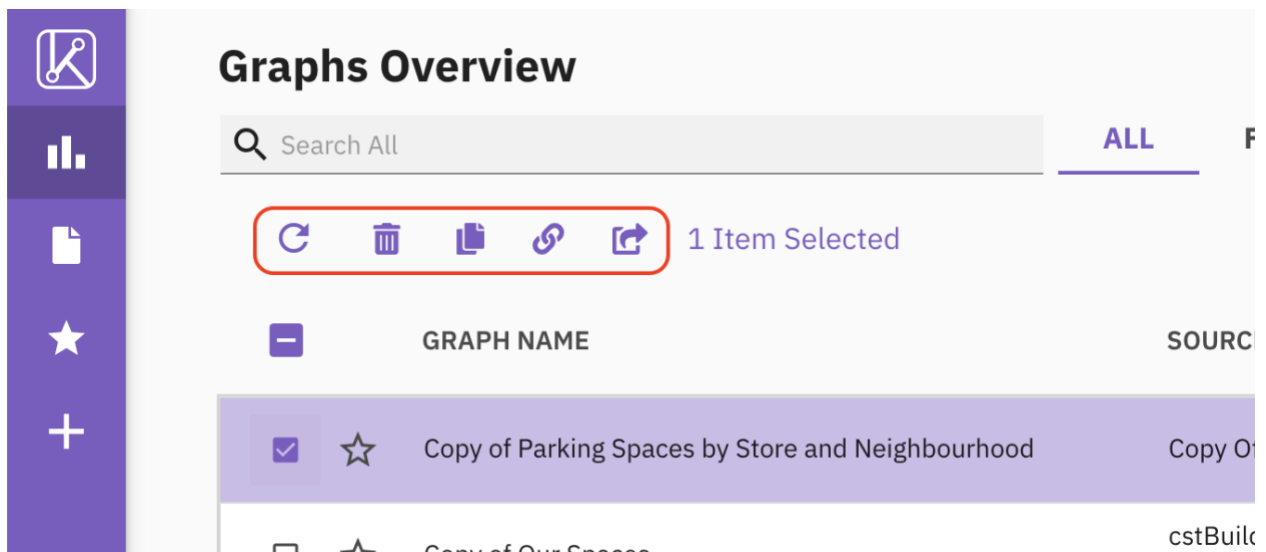
Kurve Admins have the same capabilities for their own graphs and shared graphs. Your batch action icons will change according to your current graph selections.

- a. If you have no graphs selected, your actions are as follows:






	Select All	Select all graphs on the page.
	Refresh	Refresh the page.

- b. If you have selected ONE graph, your options are:

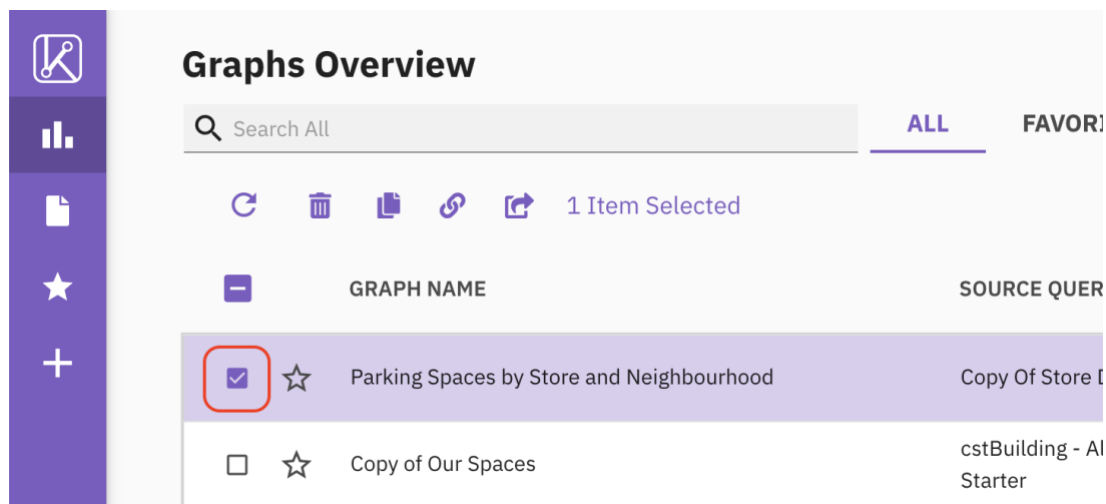



Features of the Graphs Action Toolbar:

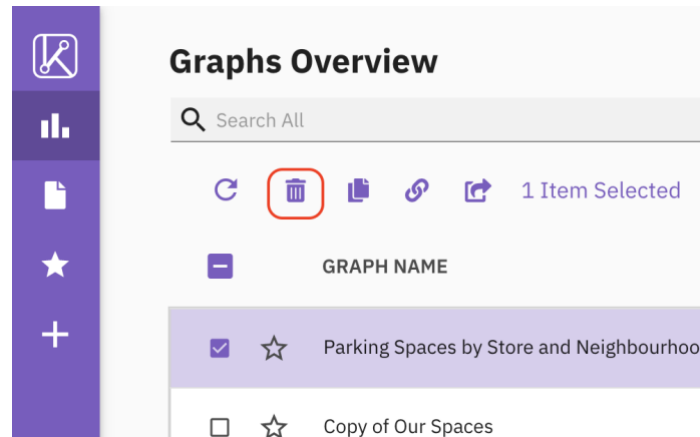
	Refresh	Refresh the page.
	Delete Graph	Delete a graph.

	Copy Graph	Copy an existing graph.
	Get Portal/Form URL	Get a Portal or Form URL to embed the graph into a portal section or form tab.
	Change Shared Settings	Make changes to whom the graph is shared with (public, private, or specific individuals).

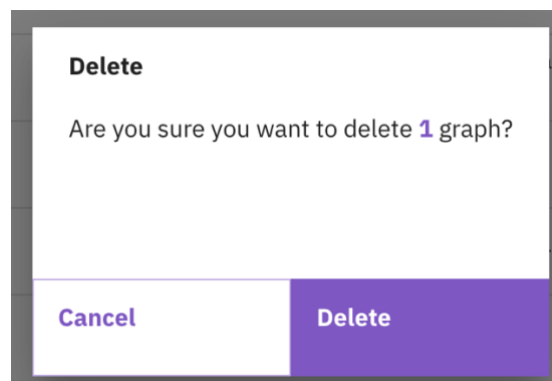
- i. **Select Graph Function:** Select the graph by clicking the white square (it will turn purple once selected).



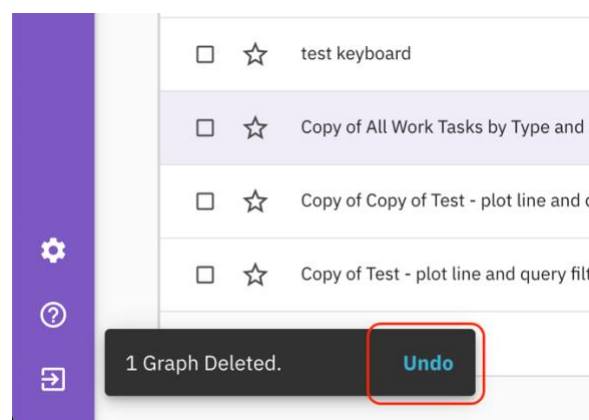
- ii. Once selected, the toolbar will update with all options.
- c. **Delete Function:** Delete any graph that has been *created*. As an admin, you can delete graphs made by you or others.
 - i. Navigate to the Graph Menu Bar and find the graph you want to delete under the Personal tab. Click the trashcan icon ().




- ii. A prompt will appear: “Are you sure you want to delete 1 graph”. Select “Delete” to delete or “Cancel” to get out of the pop up.

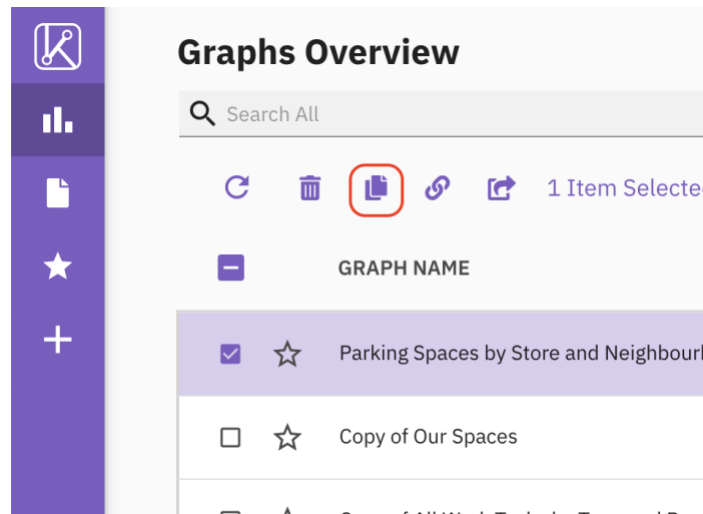


- iii. If you accidentally deleted a graph you did not mean to, you can Undo the delete and restore your graph. Once you click Delete, a pop up will appear at the bottom left of the page. To restore the graph that you deleted, click Undo.

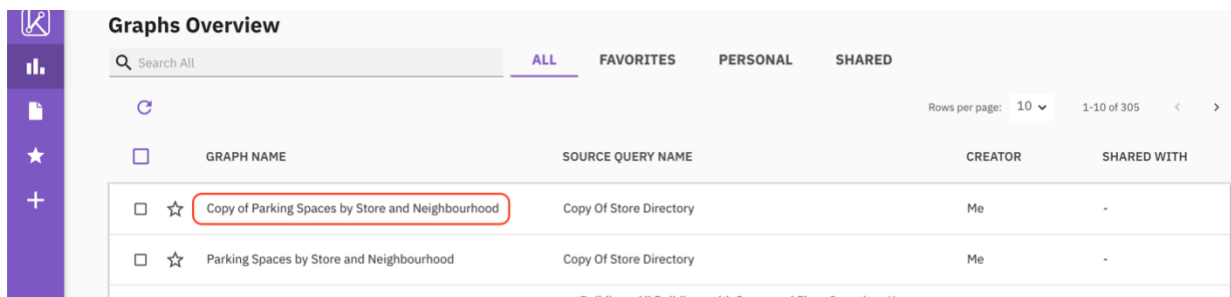



Note: The pop up will only appear for a few seconds. If it disappears and you wish to restore the graph, please go to the admin portal.

- d. **Copy Graph** Function: Click on the copy graph icon () beside the graph you want to copy.

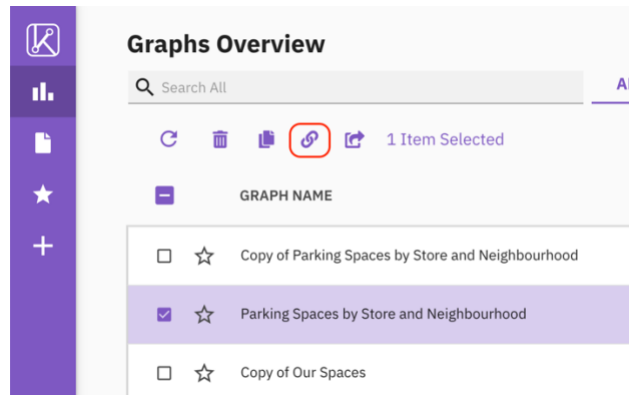


- i. A copy of the selected graph will appear in the list of graphs.

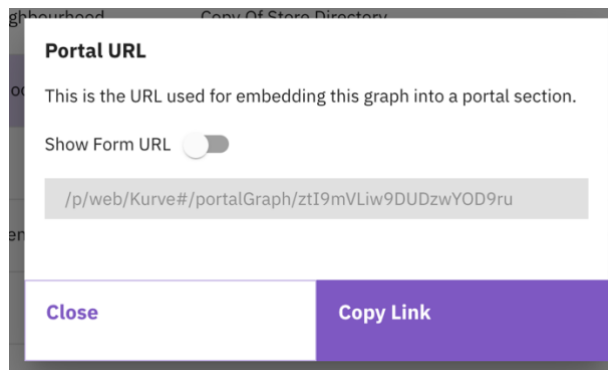


- e. **Get Portal/Form URL** Function: Click on the Get Portal URL icon () next to the graph you would like to get a portal URL for.

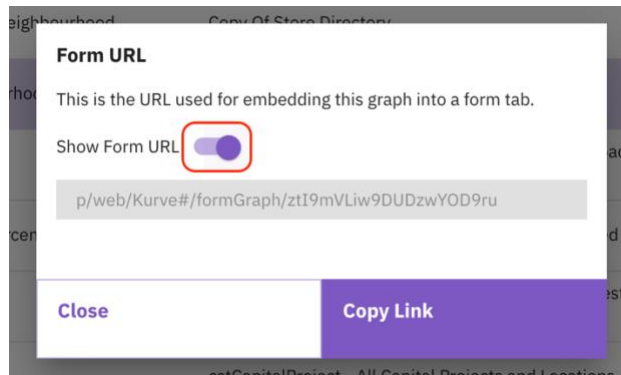
Note: this tool is only used by TRIRIGA Admins to embed graphs and reports into TRIRIGA Portals.



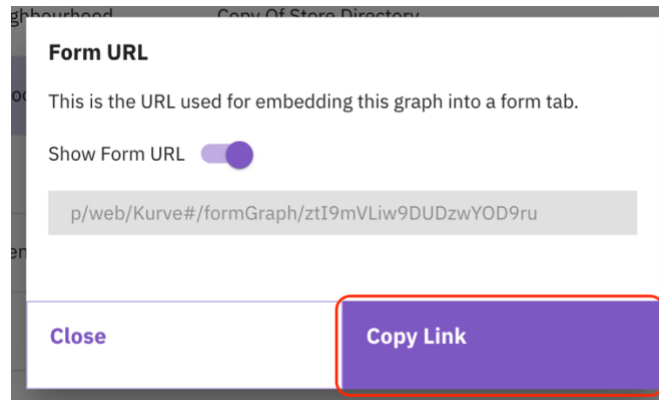
- i. A window will pop-up with the URL for the Portal section. You may use the URL to embed the graph into a portal section by clicking on the Copy Link button.



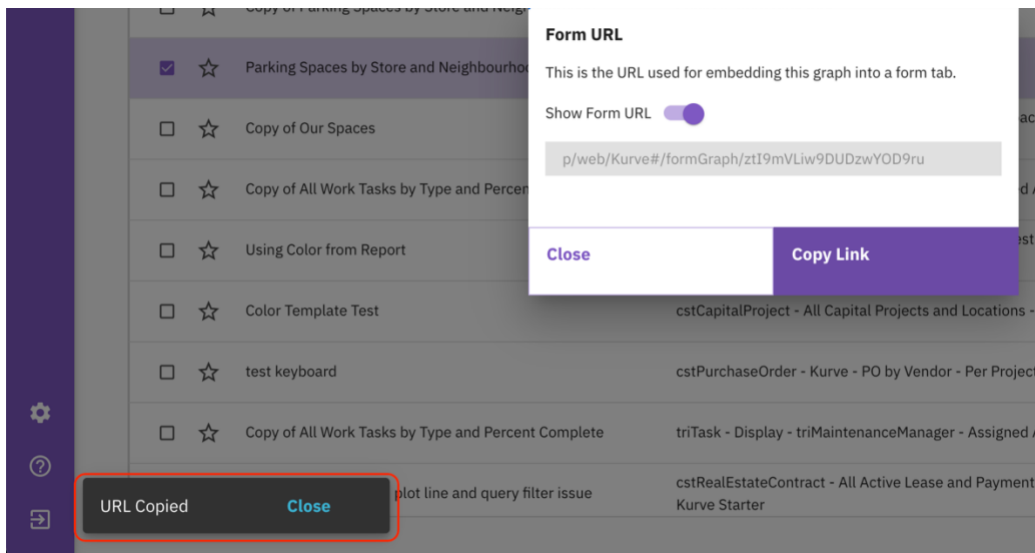
- ii. To get the link for embedding your graph or report into a form, click the Show Form URL toggle. The URL will change, and the heading will say Form URL.



- iii. Click Copy Link to copy the Form URL link to your clipboard. Paste it into any form tab using an External Tab.




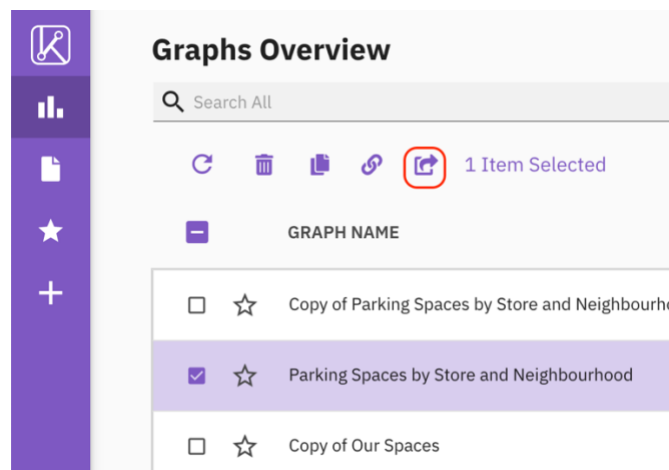
- iv. Once copied, a pop-up will appear at the bottom left indicating the URL has been copied.



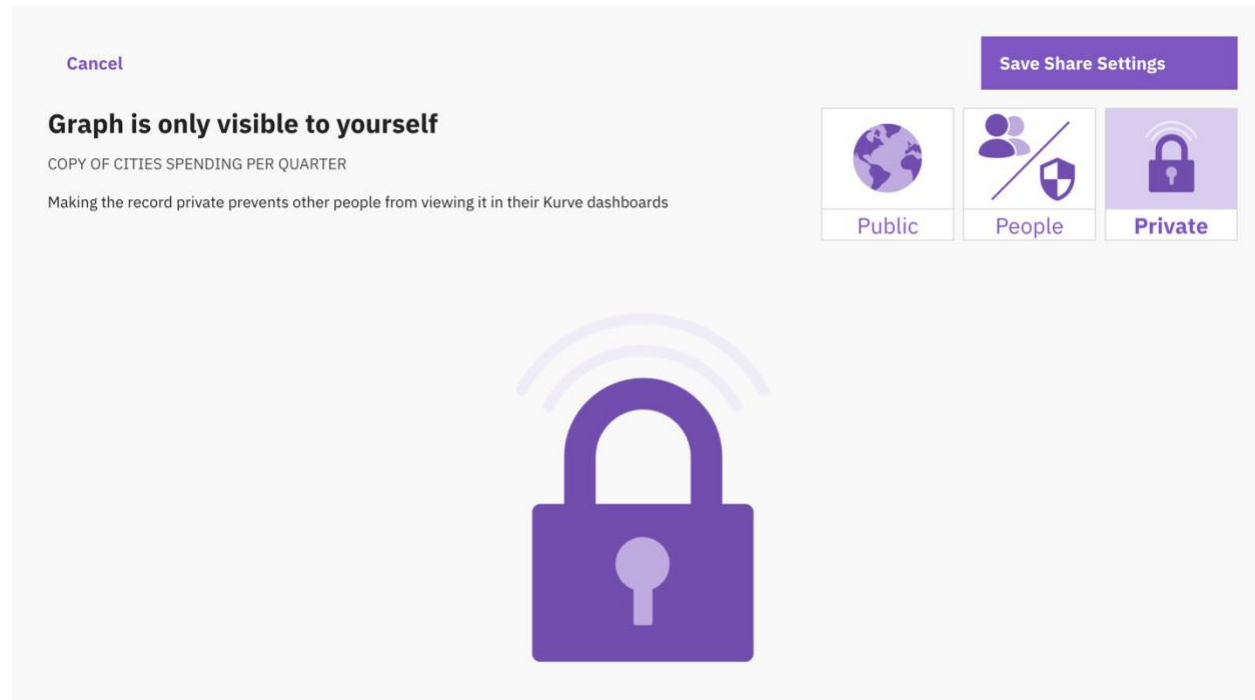
- f. **Change Share Settings** Function: You may identify each graph's share settings on the last column of the Graphs Overview labeled "Shared With."
- In the Graphs Overview, under the "Shared With" column, if "Individual" is selected for the share setting, it will appear with the symbol (👤) and the number of people the graph is shared with.
 - If "Public" is selected for the share setting, it will appear with the symbol (🌐) and "Public."
 - If "Private" is selected for the share setting, it will appear with a "-" symbol.
 - If "Group" is selected for the share setting, it will appear with the symbol (👥) and the number of security groups the graph is shared with.
 - Note: you can share with multiple people and groups at the same time.

GRAPH NAME	SOURCE QUERY NAME	CREATOR	SHARED WITH
<input type="checkbox"/> ☆ Copy of Parking Spaces by Store and Neighbourhood	Copy Of Store Directory	Me	2 1
<input type="checkbox"/> ☆ Parking Spaces by Store and Neighbourhood	Copy Of Store Directory	Me	-
<input type="checkbox"/> ☆ Copy of Our Spaces	cstBuilding - All Buildings with Space and Floor Capacity - Kurve Starter	Me	-
<input type="checkbox"/> ☆ Copy of All Work Tasks by Type and Percent Complete	triTask - Display - triMaintenanceManager - Assigned Active Tasks	Me	1 3
<input type="checkbox"/> ☆ Using Color from Report	cstWorkTask - All Corrective Work Tasks with Request Class - Kurve Starter	Me	-
<input type="checkbox"/> ☆ Color Template Test	cstCapitalProject - All Capital Projects and Locations - Kurve Starter	Me	Public

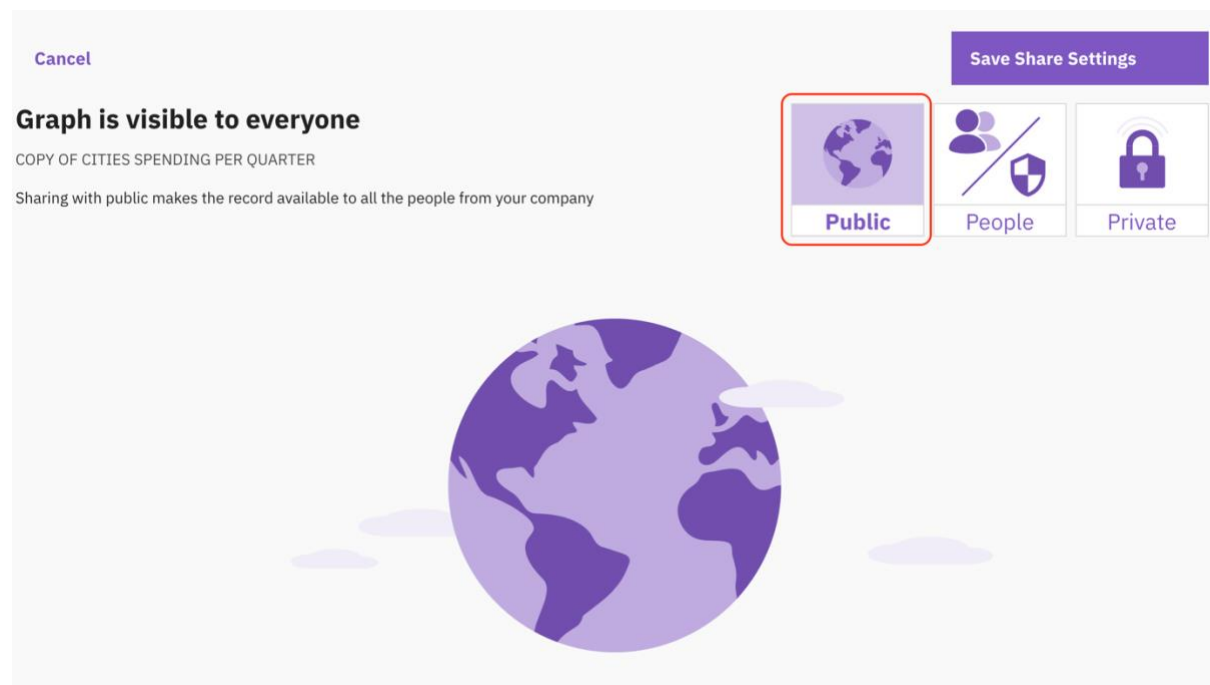
- i. Click on the Change Share Settings icon () next to the graph you would like to change the share settings for.



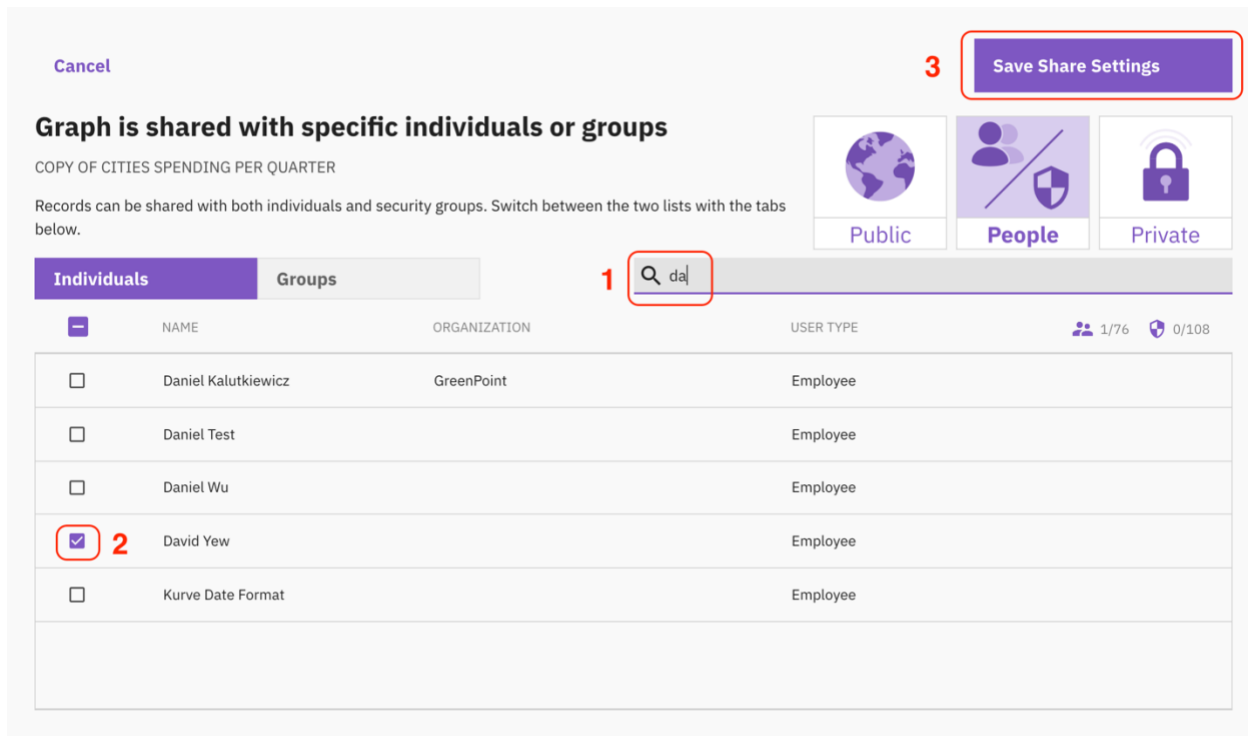
- ii. A new window will appear. Please note that all graphs will have a default share setting of “Private.”



- iii. Click on “Public” if you would want the graph to be accessible for all users in the system.



- iv. Click on “People,” if there are specific individuals or security groups to share the graph with. You will be brought to the page where you may search for the individuals.
- Type in the name
 - Select the check mark next to the name(s) of people you would like to share
 - Click “Save Share Settings”



Graph is shared with specific individuals or groups

COPY OF CITIES SPENDING PER QUARTER

Records can be shared with both individuals and security groups. Switch between the two lists with the tabs below.

Public **People** Private

Individuals Groups

1

	NAME	ORGANIZATION	USER TYPE
<input type="checkbox"/>	Daniel Kalutkiewicz	GreenPoint	Employee
<input type="checkbox"/>	Daniel Test		Employee
<input type="checkbox"/>	Daniel Wu		Employee
<input checked="" type="checkbox"/> 2	David Yew		Employee
<input type="checkbox"/>	Kurve Date Format		Employee

3 Save Share Settings

- v. To share with one or multiple security groups, click on “People” and then click on Groups This will change the list to show security groups instead of individuals.

[Cancel](#) [Save Share Settings](#)

Graph is shared with specific individuals or groups

COPY OF CITIES SPENDING PER QUARTER

Records can be shared with both individuals and security groups. Switch between the two lists with the tabs below.

Individuals

Groups

Public People Private

1/76 0/108

<input type="checkbox"/>	AAA DELETE ME GROUP
<input type="checkbox"/>	Admin Group
<input type="checkbox"/>	CDE Customer Data Security

- vi. You can share with groups and/or individuals.
- Simply search for the group you would like to share, click on the box next to it, and click Save Share Settings.

[Cancel](#) [Save Share Settings](#)

Graph is shared with specific individuals or groups

COPY OF CITIES SPENDING PER QUARTER

Records can be shared with both individuals and security groups. Switch between the two lists with the tabs below.

Individuals

Groups

Public People Private

1/76 2/108

<input type="checkbox"/>	AAA DELETE ME GROUP
--------------------------	---------------------

- You can keep track of who you have shared with

[Cancel](#) [Save Share Settings](#)

Graph is shared with specific individuals or groups

COPY OF CITIES SPENDING PER QUARTER

Records can be shared with both individuals and security groups. Switch between the two lists with the tabs below.

Individuals

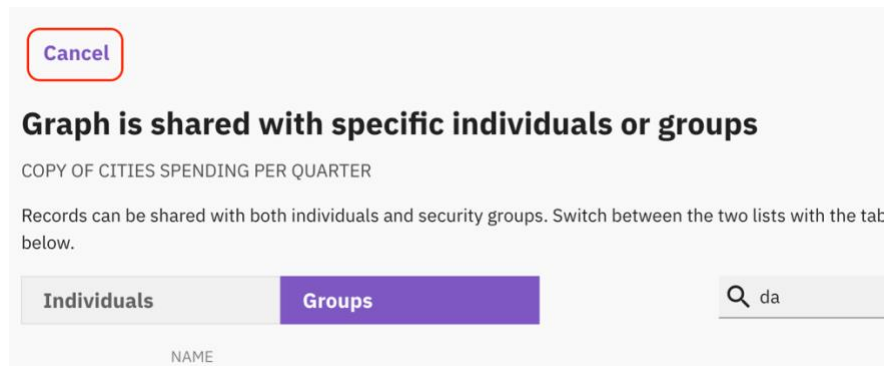
Groups

Public People Private

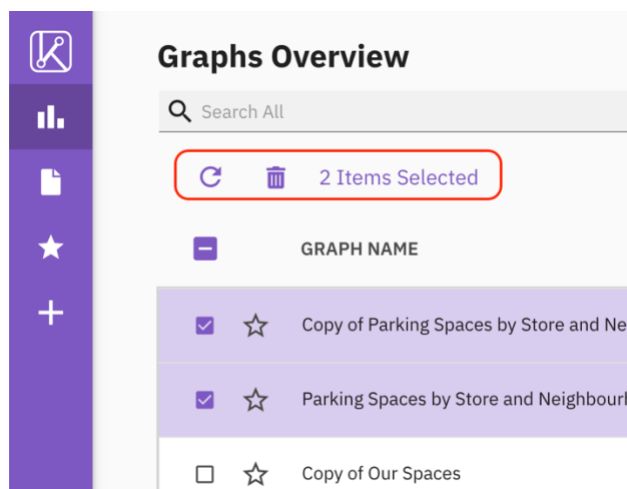
1/76 2/108

<input type="checkbox"/>	AAA DELETE ME GROUP
<input type="checkbox"/>	Admin Group
<input checked="" type="checkbox"/>	CDE Customer Data Security
<input checked="" type="checkbox"/>	Customer - ABC
<input type="checkbox"/>	FFX Requestor (NF)

- vii. If you would like to exit out of the Change Share Settings page, click the Cancel button. This will not save any of your changes made.



- g. If you have selected more than one graph, your options are:



	Select	Unselect the graphs that are currently selected.
	Refresh	Refresh the list of graphs.
	Delete	Delete the selected graphs.

3. Using a Specific Graph's Toolbar

- a. Open a graph by clicking anywhere on the graph's text link.

Graphs Overview

count of

ALL

FAVORITES

PERSONAL

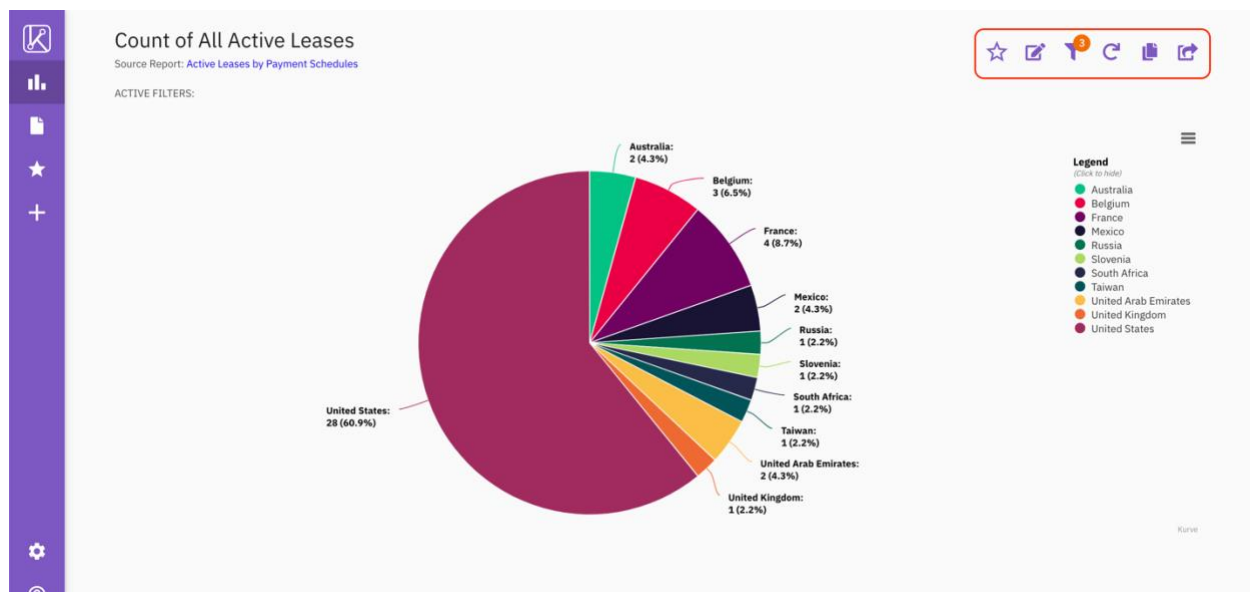
SHARED

Rows per page: 10



1-4 of 4

	GRAPH NAME	SOURCE QUERY NAME	CREATOR	SHARED WITH
	Count of Records by Date and Form	cstLocation - Kurve Test - All Locations	Me	-
	Copy of Count of All Active Leases	cstRealEstateContract - All Active Lease and Payment Schedules - Kurve Starter	Me	-
	Count of All Active Leases	cstRealEstateContract - All Active Lease and Payment Schedules - Kurve Starter	Me	-
	Count of All Active Leases	cstRealEstateContract - All Active Lease and Payment Schedules - Kurve Starter	Me	-

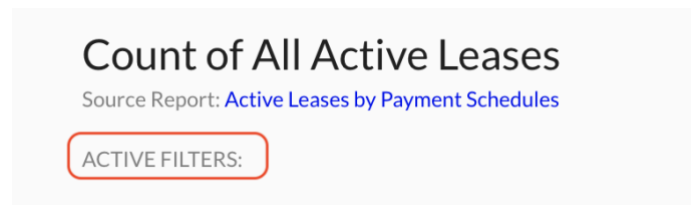
b. Features of the graph's toolbar:



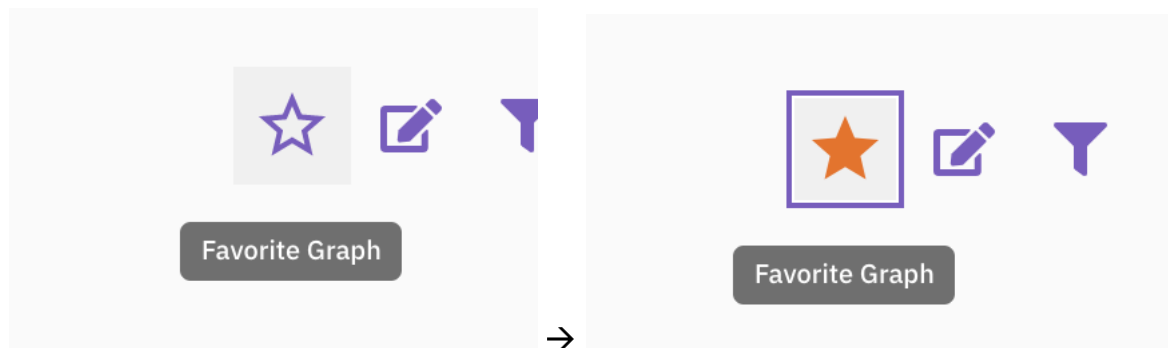
	Favourite Graph	Pin a graph to your home page or favourites page for easier access.
	Edit Graph	Make edits to the opened graph.
	Create/ Apply Filters	Filter your graph to show specific results. Filters created will be saved here. All filters created and applied by the owner will be saved.
	Refresh	Refresh the data in your graph without having to refresh the page. Also use this to refresh your query

		filters and apply new values. The query filters themselves can be edited in the edit graph window.
	Copy Graph	Copy the opened graph.
	Change Share Settings	Make changes to whom the graph is shared with (public, private, or specific individuals).

Below the title of the graph and query, there is an Active Filters section. This section will populate with filters once they are created and applied.



- c. **Favourite Graph** function: you can easily favourite a graph by clicking on the star icon. When a graph is favourited, the star will be colored orange.




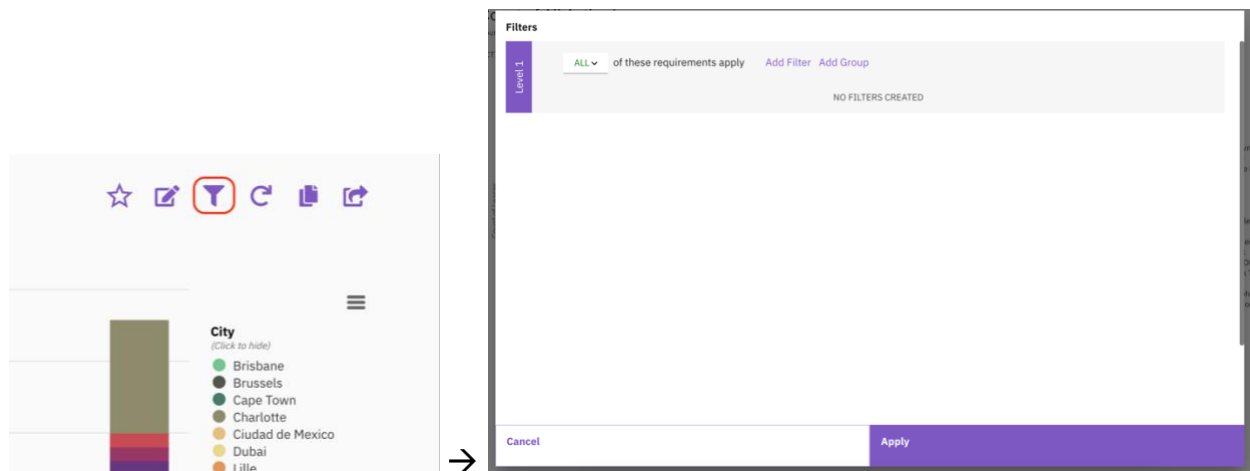
- d. **Create/ Apply Filters** Function: graph filters will be covered in Section 4.
- e. **Copy / Edit / Change Share Settings** Function: The icons have the same functions as described in *Graphs Portal - Section 2*.

4. Advanced Graph Filtering

Graph filtering in Kurve has AND/OR logic and allows for multiple levels of filtering. The following section will outline some different scenarios on how to use graph filtering.

All filters created and applied by either a Kurve Admin and/or the owner of the graph will be saved.

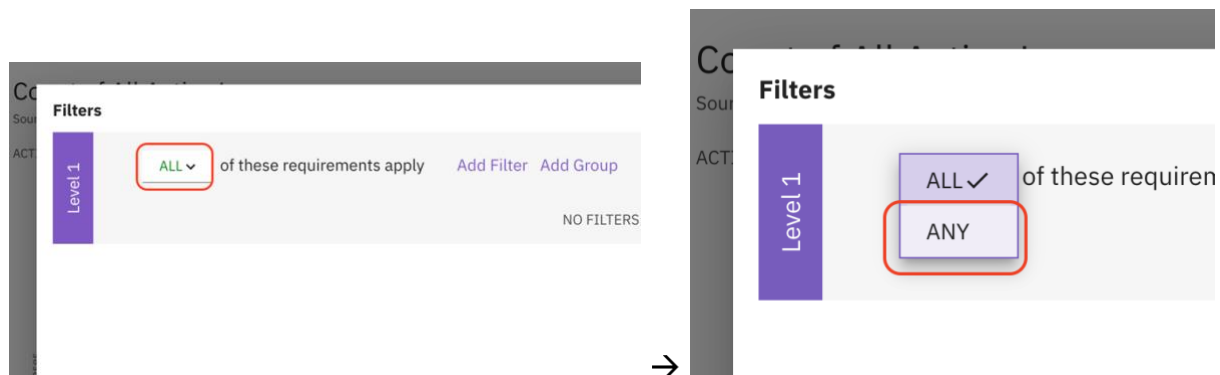
- a. To add a filter to your graph, open a graph and then select the Filter icon () in the graph toolbar.



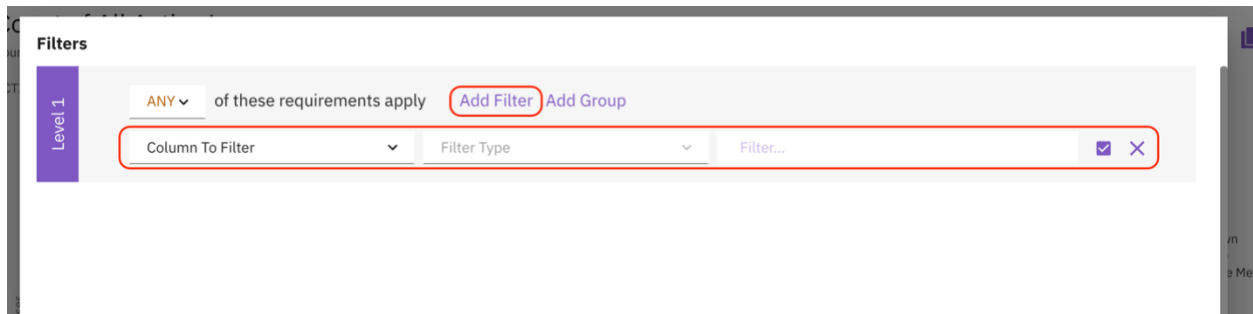
- b. When the Filter window is open, decide whether you want AND or OR logic to be applied.


NOTE: Default filtering behaviour is selected as ALL. This will automatically implement AND logic to the graph and all active filters will be applied.

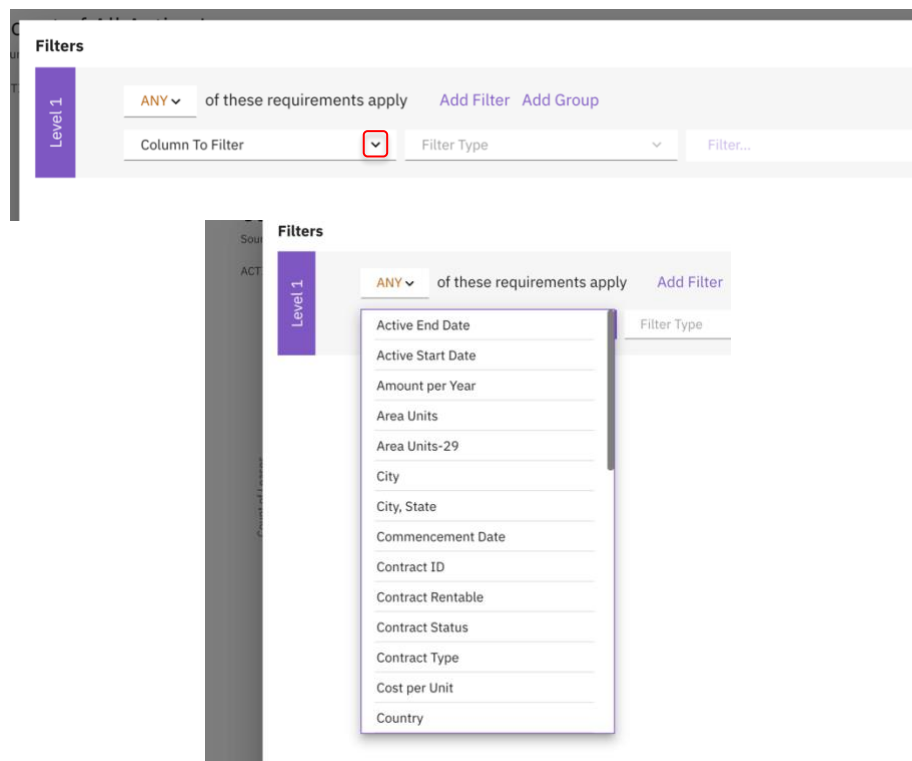
- c. If you would like to change the logic to OR, click the dropdown and select ANY. This means if a field meets ANY of the active filters it be applied to the graph.



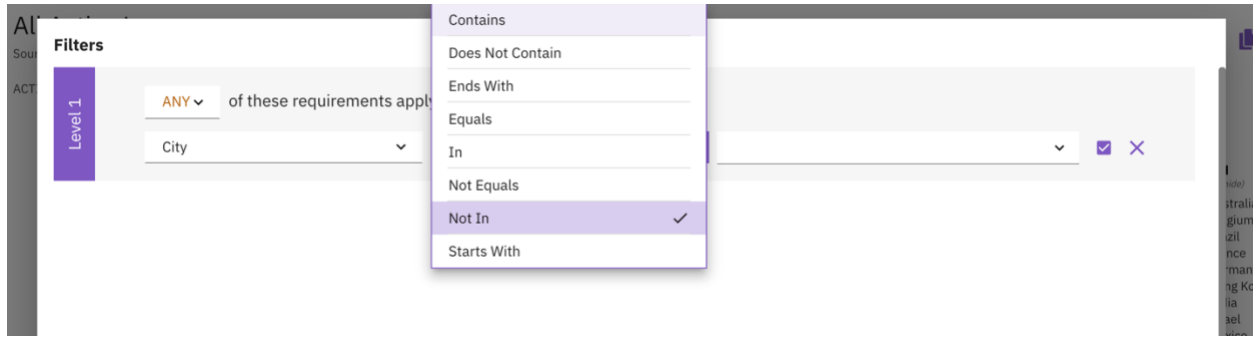
- d. Now that you have identified the logic, add a filter by clicking on the Add Filter button. A row will appear below for you to select your column to filter, filter type, and filter value(s).



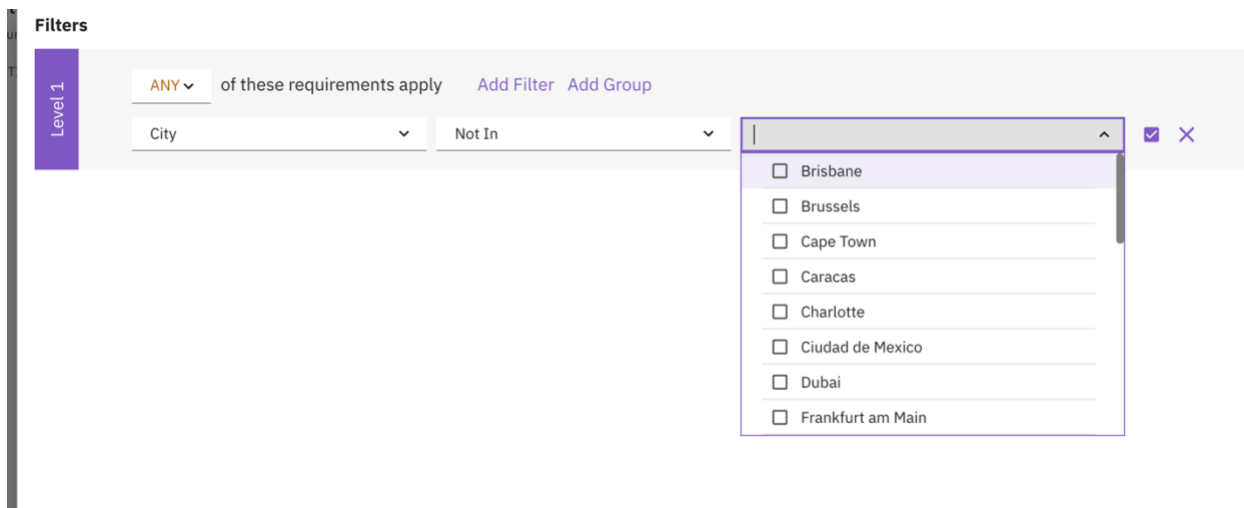
- e. Select the column you would like to filter by clicking on the drop-down arrow icon next to "Column To Filter" ().



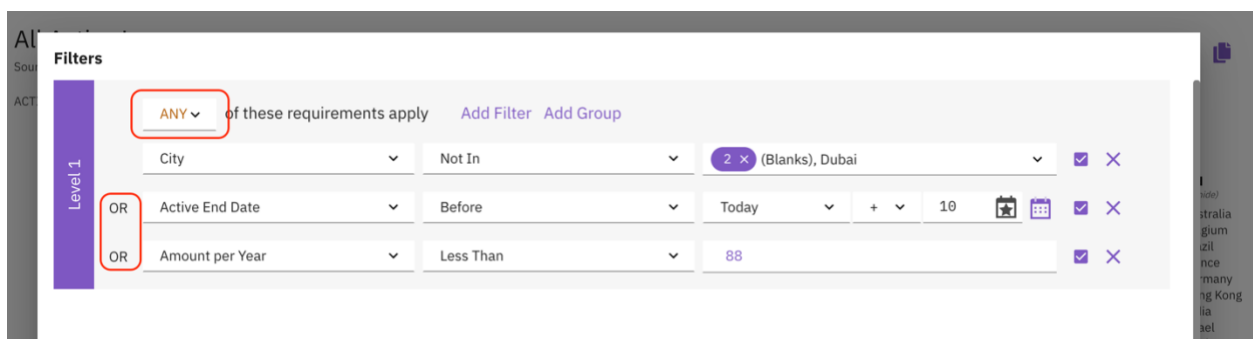
- f. Select the Filter Type by clicking on the drop-down arrow next to "Filter Type". The filter type will change depending on the field type (i.e. number, date, datetime, text).



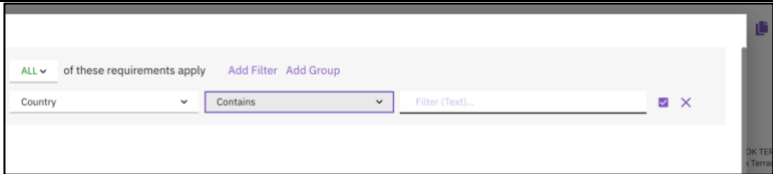
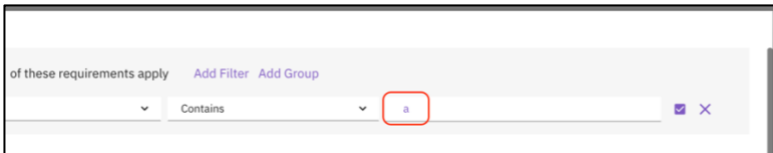
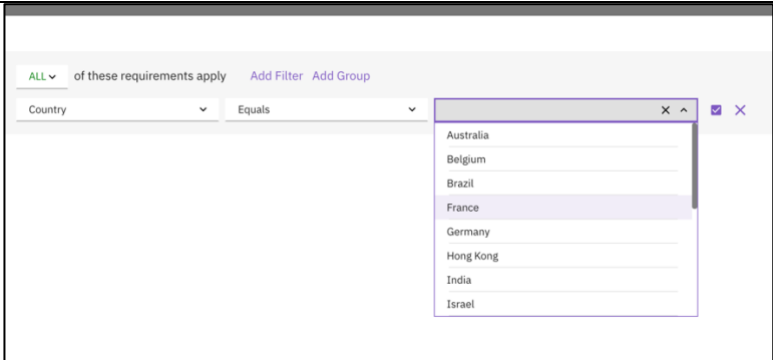
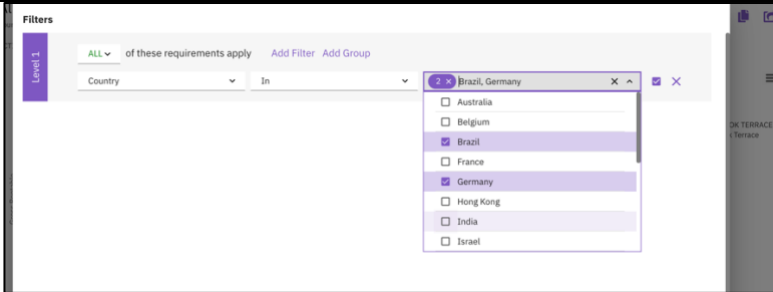
g. Input the value that you would like to filter for in the last box “Filter...”.



h. As you add additional filters, you will see “AND” or “OR” depending on your selection of ANY/ALL between each filter. This indicates how the filters are being applied to your graph.



- i. **Text Fields:** The following table indicates what the input value will be for each filter type option that is available.

Filter Type	Input Value	Example
Contains Does Not Contain Starts With Ends With	Text Input	 
Equals Not Equals	Single-select dropdown list of all unique text values available in that column	
In Not In	Multi-select dropdown list of all unique text values in that column	

- j. **Number Fields:** All fields that are set as number fields will require numerical inputs. Select: Field, Filter Type, and input the numerical value in “Filter (Number)...”

Filters

Level 1

ALL of these requirements apply Add Filter Add Group

Gross Usable More Than Filter (Number)...

Filters

Level 1

ALL of these requirements apply Add Filter Add Group

Gross Usable More Than 500

k. **Date Fields:** There are two options when filtering on date fields:

- i. **Static** (Standard Date Filters are used to filter on a specific date)
 - Select a date field and then a filter type

Filters

Level 1

ALL of these requirements apply Add Filter Add Group

Active Start Date Before yyyy-MM-dd

- Input the date you would like to filter, click into the box to either type the date or pick from the calendar display.

Filters

Level 1

ALL of these requirements apply Add Filter Add Group

Active Start Date Before yyyy-MM-dd

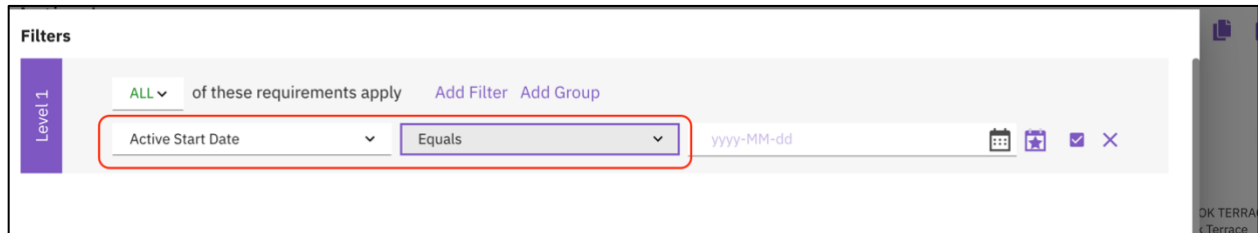
March 2021

Su	Mo	Tu	We	Th	Fr	Sa
28	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

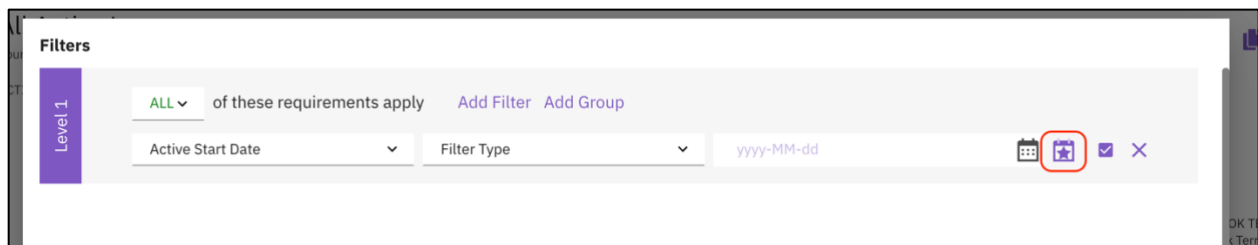
- ii. **Dynamic** (Token Date Filters are used to dynamically filter dates; compare the date you choose to a date that automatically adjusts according to the current date. This means you do not have to identify a

specific date to use the filter. For example, you can filter for the Token Date “yesterday” to display only the previous day's data.)

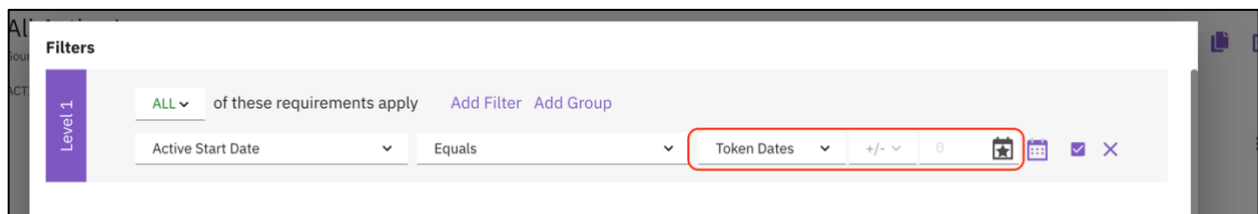
- Select a field and a filter type.



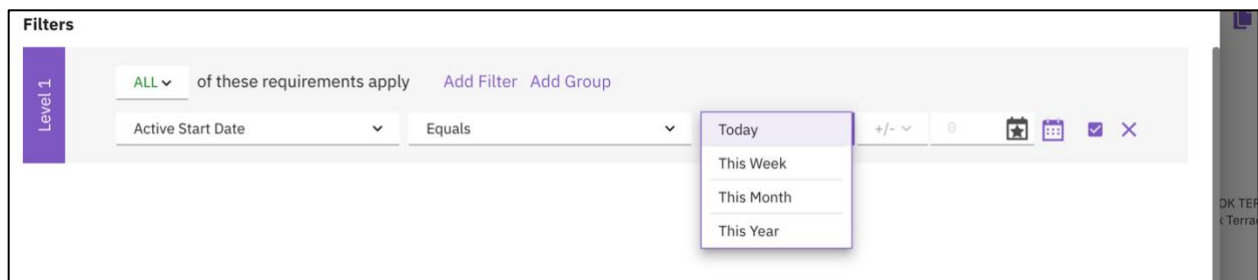
- Click the Token View icon (📅) located at the end of the filter row.

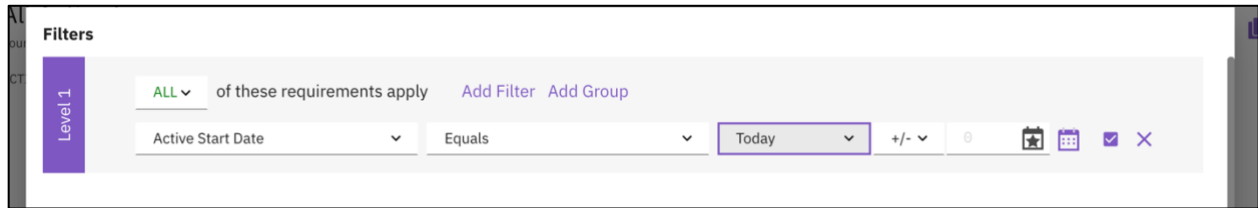


- The row will change to show three new inputs.



- Select a token by clicking into the Token Date dropdown. Your options include 'Today', 'This Week', 'This Month', and 'This Year.'



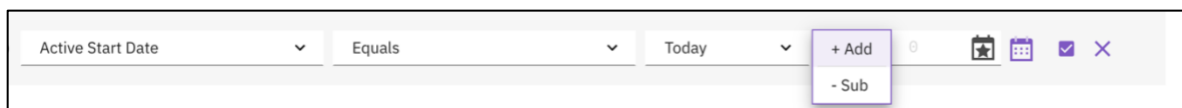


- iii. [Optional] Offsetting the Token Date: You have the option to offset the time (+/-) of your current token selection by days (Today), *weeks (This week), months (This month), or years (This year).

***NOTE:** Offsetting the Token Date by **weeks** follows calendar weeks (with the start of the week being a Sunday).

NOTE: Be careful of your Filter Type and Date Token selections as your outcome will change (see the two tables below for examples).

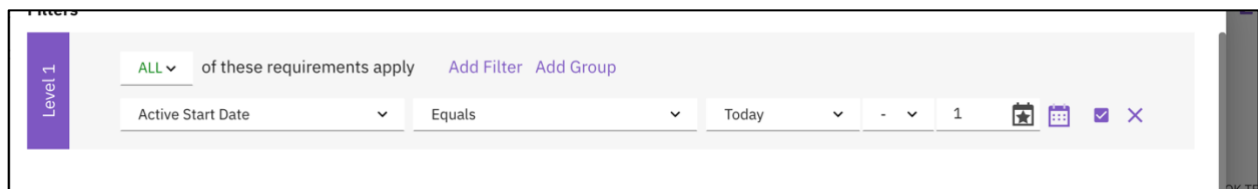
- Select Plus or Minus from the dropdown.



- Type the offset value in the last box.



For example, if you want to filter the graph for an Active Start equal to Yesterday, select Today sub (-) 1:



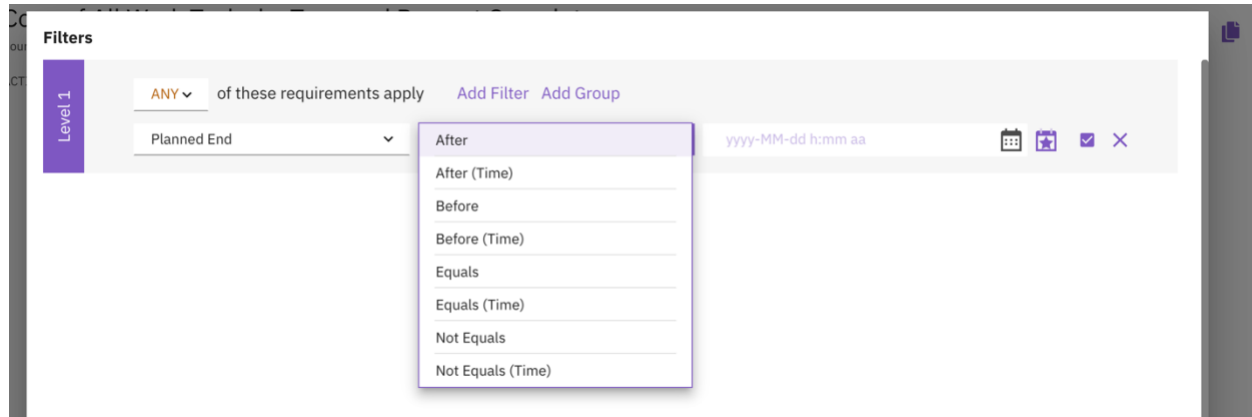
In the table below, we will use a real-life example of how to apply different token filters using Today's date. In this example, we are filtering on the Active Start Date and assuming "today's date" is January 1, 2021:

Filter Type	Token Date	Time Offset	Example	Outcome
Equals	Today	By Day(s)	Today + 5	Shows all data with an Active Start Date OF January 6, 2021.
Before	Today	By Days(s)	Today + 5	Shows all data with an Active Start Date BEFORE January 6, 2021.
After	Today	By Day(s)	Today + 5	Shows all data with an Active Start Date AFTER January 6, 2021.

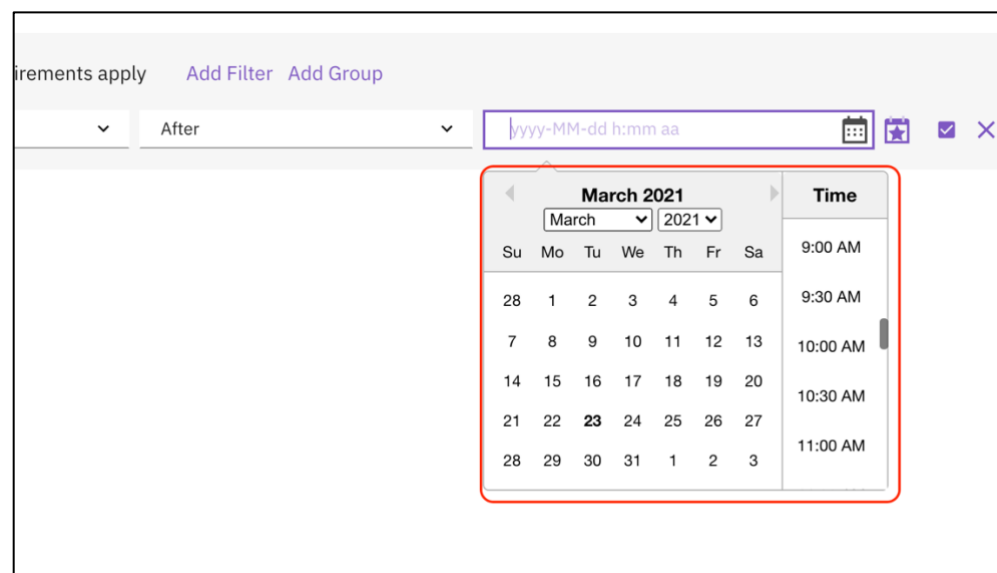
In the table below, we will use a real-life example of how to apply different token filters using This Month. In this example, we are filtering on the Active Start Date and assuming "today's date" is January 1, 2021:

Filter Type	Token Date	Time Offset	Example	Outcome
Equals	This Month	By Month(s)	This Month + 1	Shows all data with an Active Start Date BETWEEN February 1-28, 2021.
Before	This Month	By Month(s)	This Month + 1	Shows all data with an Active Start Date BEFORE February 1, 2021.
After	This Month	By Month(s)	This Month + 1	Shows all data with an Active Start Date AFTER February 28, 2021.

- I. **Date/Time Fields:** There are filters for the Date AND Time portion of the field (e.g., After) and there are filters just for the Time portion of the field (e.g., After (Time)):
 - i. Select a 'Column to Filter'
 - ii. Select the 'Filter Type'



- iii. Click into the input box 'Filter...' to select a date and/or time from the calendar pop-up.

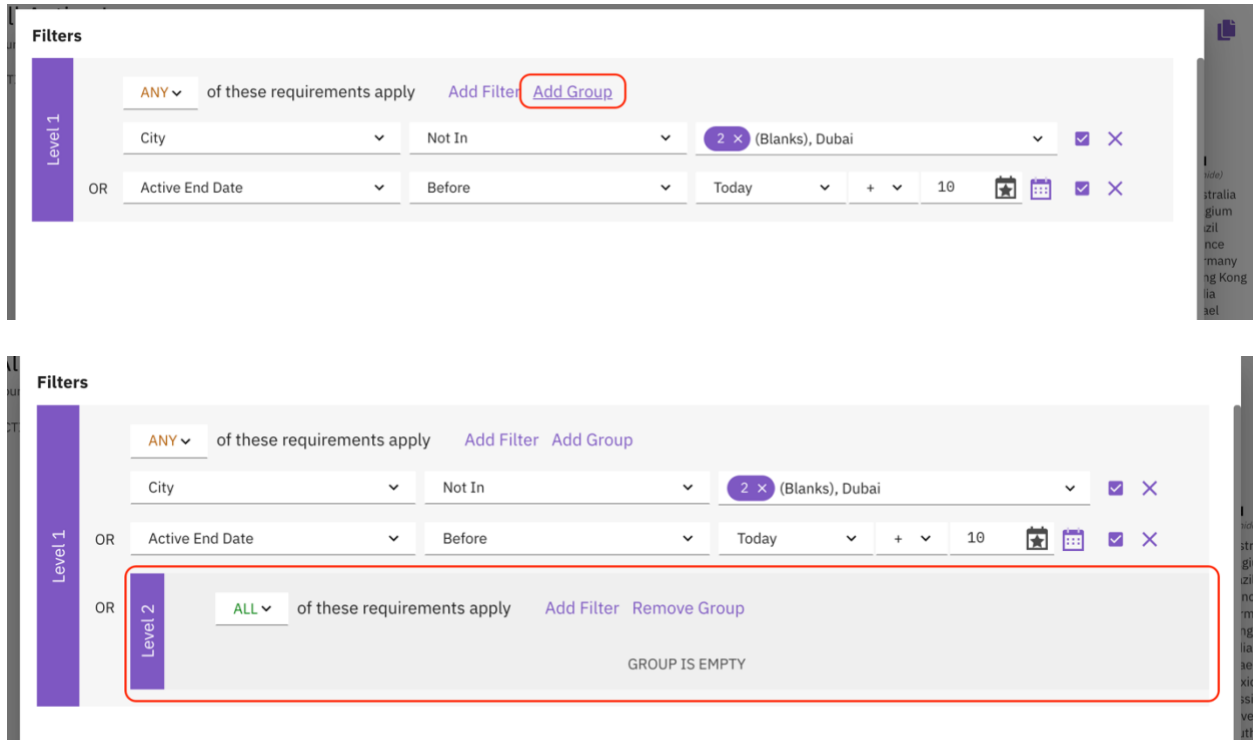


- m. **Adding Group Filters:** Groups lets you combine different types of logic in the filters, so you can have multiple sets of ANY filters, or look for ANY of several sets of more complex conditions.

NOTE: Many people are familiar with AND/OR logic. The same principals apply here with Kurve, but to make the context easier to understand, please note that:

- **ALL** is associated with **AND**
- **ANY** is associated with **OR**

- i. Click 'Add Group' in your filter window to add another level to your filter.



- ii. Add filters to your newly established Level 2 Group. Filters are added in the same way as described above.

Let's walk through an example of when and how to use multi-group filtering. Suppose you wanted to apply the following filters to a graph dedicated to Work Tasks:

- WHERE {Priority Level} is High
- OR {Work Task Type} is Corrective
- AND {Due Date} is Today

In this case, it's unclear whether you want to see:

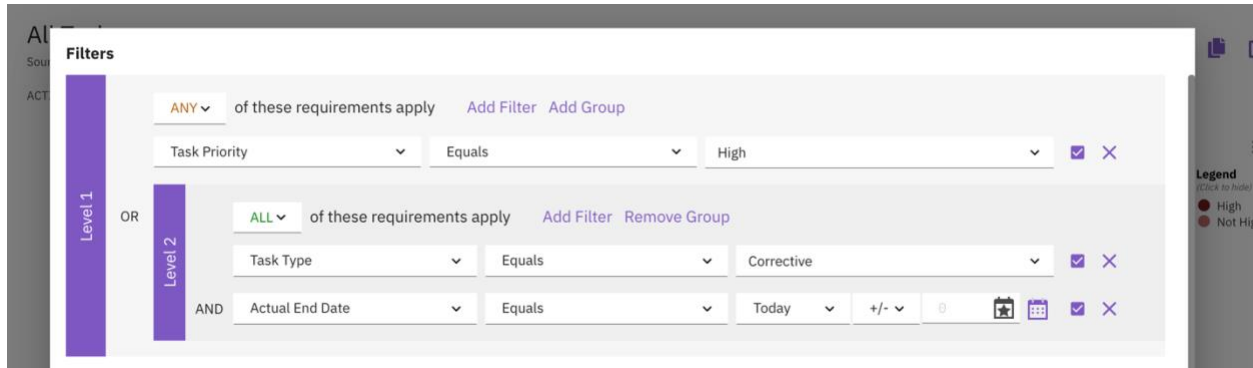
- (High OR Corrective) AND Today
- High OR (Corrective AND Today)

These have different meanings but we want to filter for the second scenario—let's use groups to make this more clear.

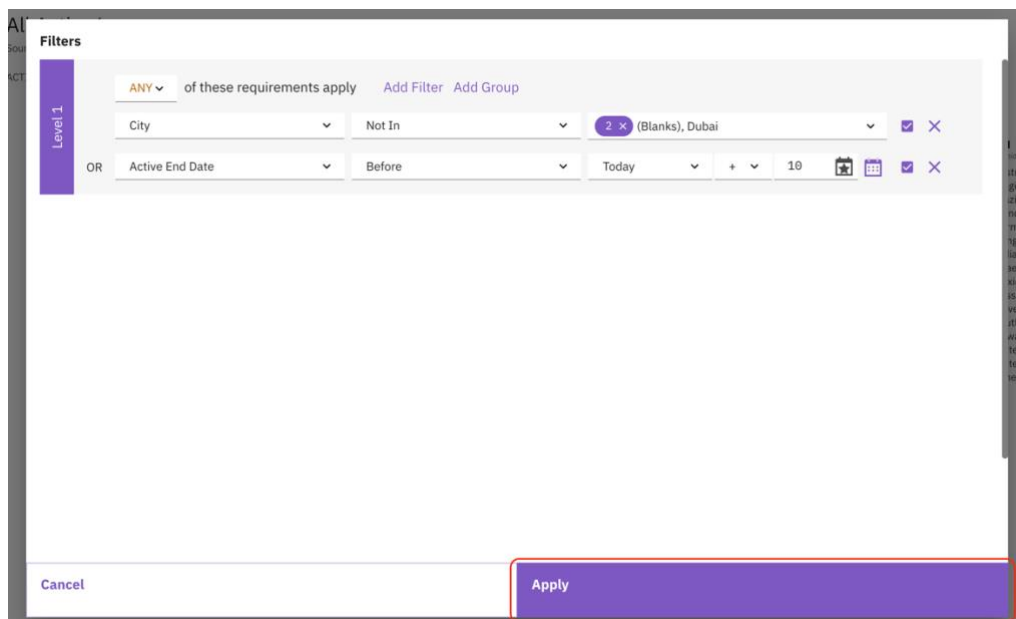
- Level 1: ANY
Priority Level Equals High
- Level 2: ALL
Task Type Equals Corrective

AND
Due Date (Token Date) Equals TODAY

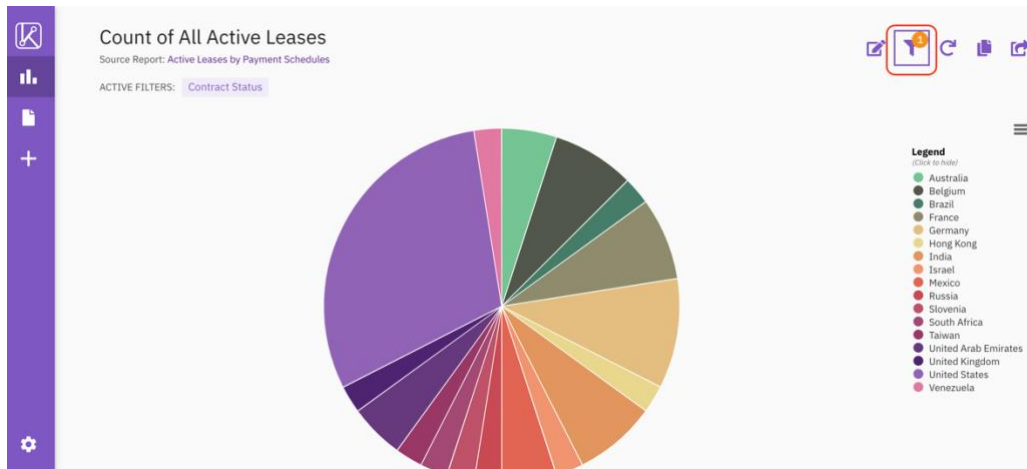
In a Kurve graph the filters would look like this:



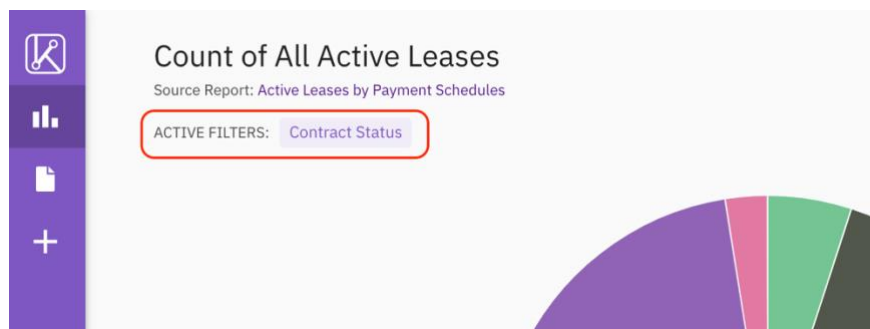
- n. When ready to apply your filter selections to your graph, click 'Apply' at the bottom right of the pop-up window.



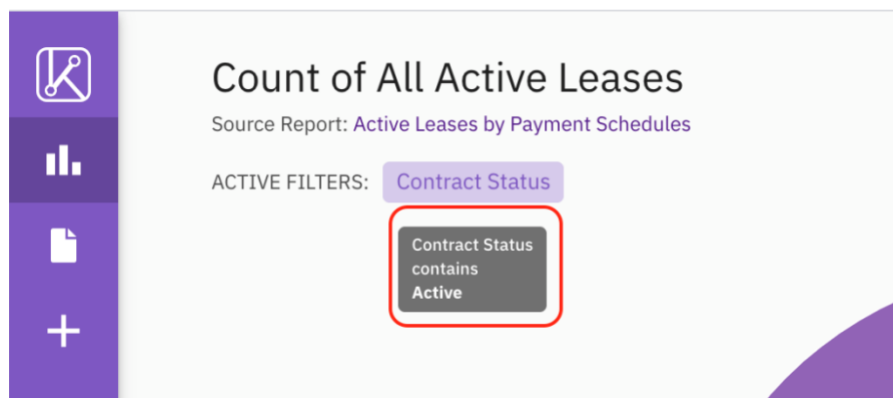
- o. When a new filter is added, the filter icon will display an orange circle with a number inside of it. This identifies the number of created filters (not necessarily all the active/applied filters).



- p. Below the title of the graph, the 'Active Filters' ribbon will display the applied filters to that graph. For example, see the screenshot below to see the 'Contract Status' filter in the ribbon.



- q. Take your mouse and hover over the active filters to view details about that specific filter, including the filter type and value(s) being filtered for.



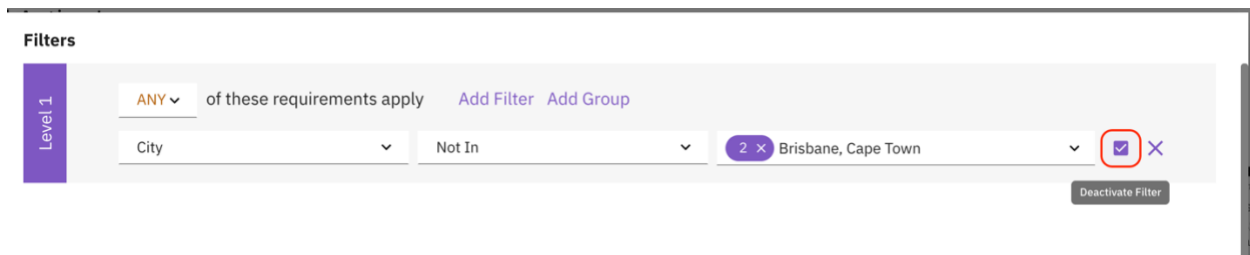
- r. If you have added a Group to your Filters, the 'Active Filters' ribbon will display as "2 Level Group - Click to View". Click to open the Filter window and view the details about the filters.

All Active Leases

Source Report: [Active Leases by Payment Schedules](#)

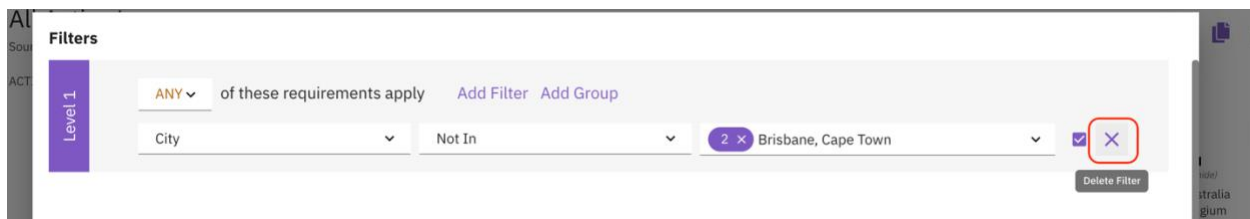
ACTIVE FILTERS: [2 Level Filter. Click to View](#)

- s. If you would like to change what is being filtered, re-open the filter page by clicking the filter icon (🔍) and make your adjustments. You can add more filters by clicking on the New Filter button.
- t. Activate/Deactivate Filters: By default, any newly created filter is assumed to be activated. Click the purple checkbox next to any filter to “deactivate” it from the graph without deleting the filter altogether.



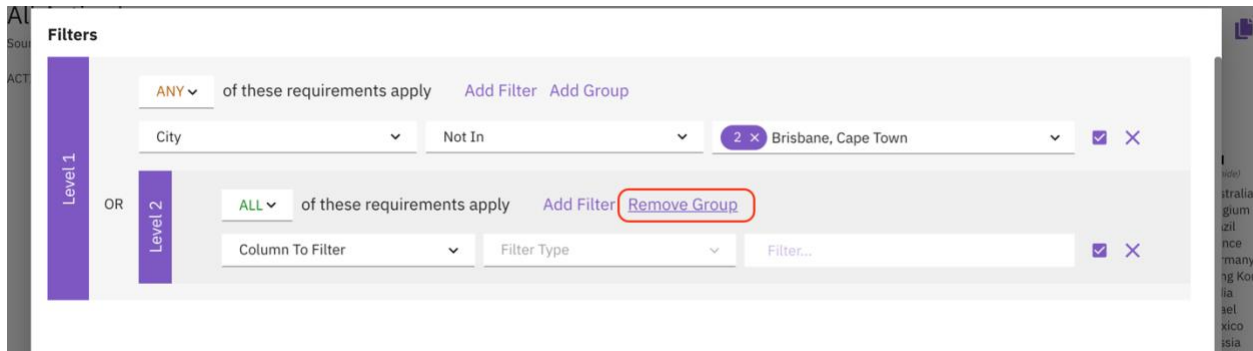
- u. Delete Filter: Click the delete icon (✕) at the end of the filter row to delete a filter.

NOTE: Once a filter is deleted, there is no way to recover the filter.



- v. Remove Group: Click 'Remove Group' if you would like to delete your Level 2 filter group.


NOTE: This will remove the group AND any filters within that group.

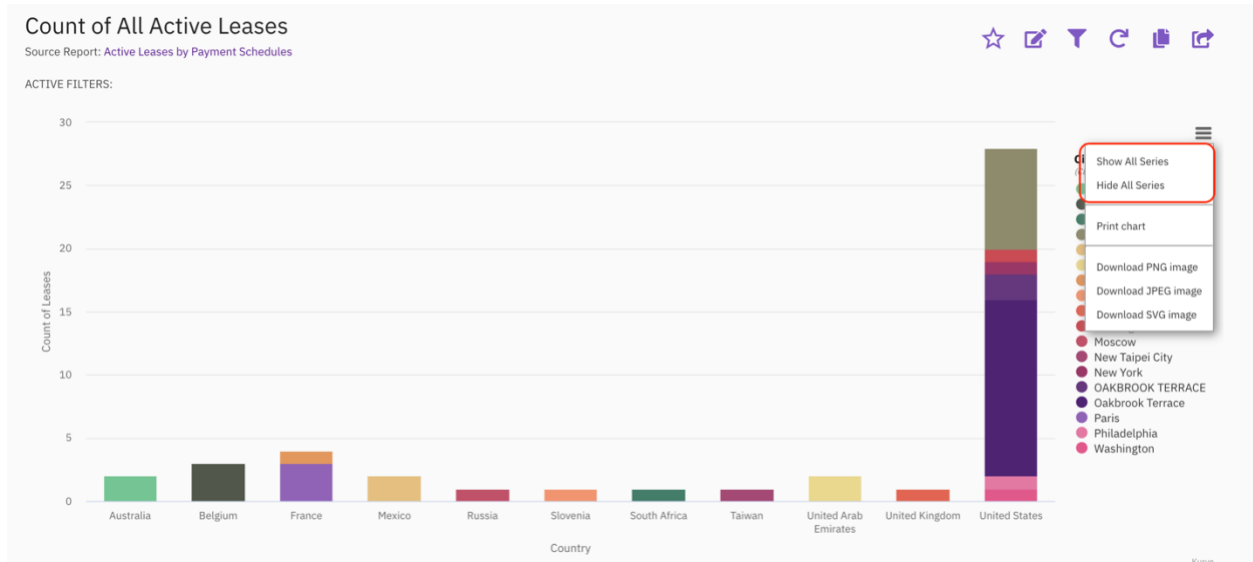


5. Refresh Data

Refreshing your data allows you to refresh to pull in the most up to date information without reloading the whole page. Or if you have filtered for a value with query filters, it allows you to change these values.

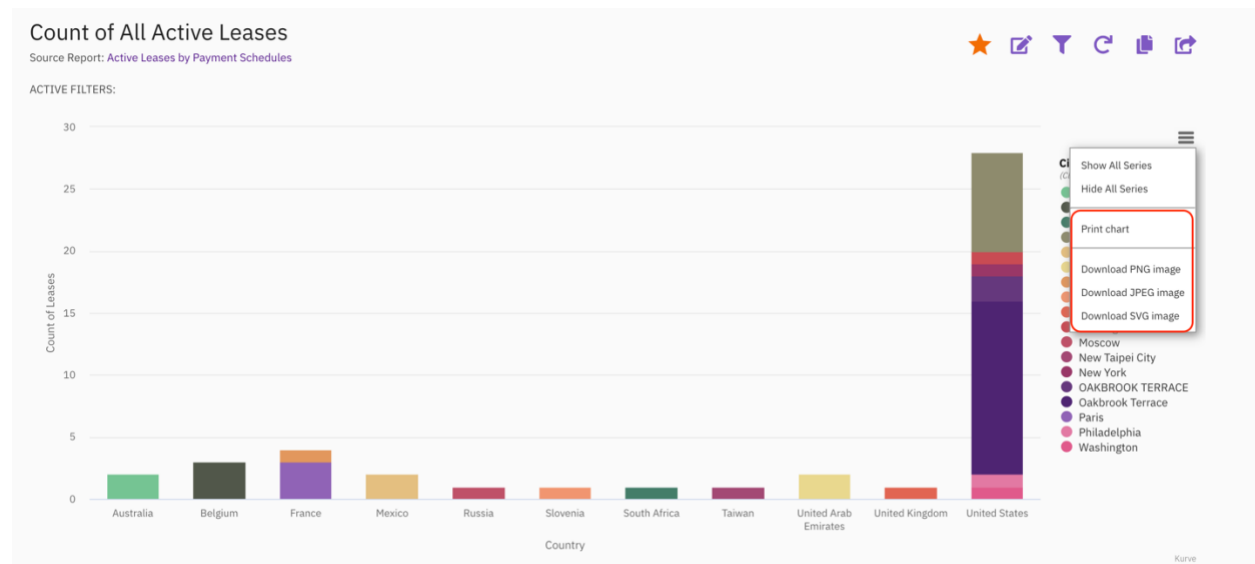
6. Showing/Hiding Series

To Show or Hide All Series on a graph, click on the menu icon () located on the right side of the webpage. A list will pop-up, select “Show All Series” to show all the data in the graph, select “Hide All Series” to hide all of the data.



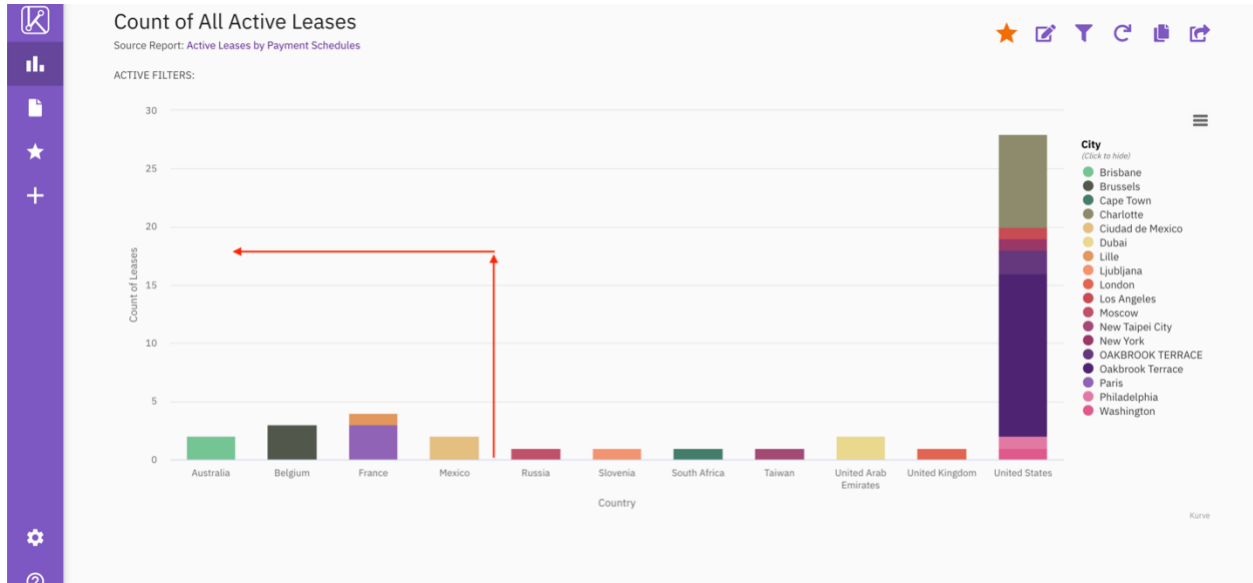
7. Printing and Downloading Graphs

Print / Download Graph Function: Click on the menu icon (☰) located on the right side of the webpage. A list will pop-up for your choice to print or download the graph in various formats.

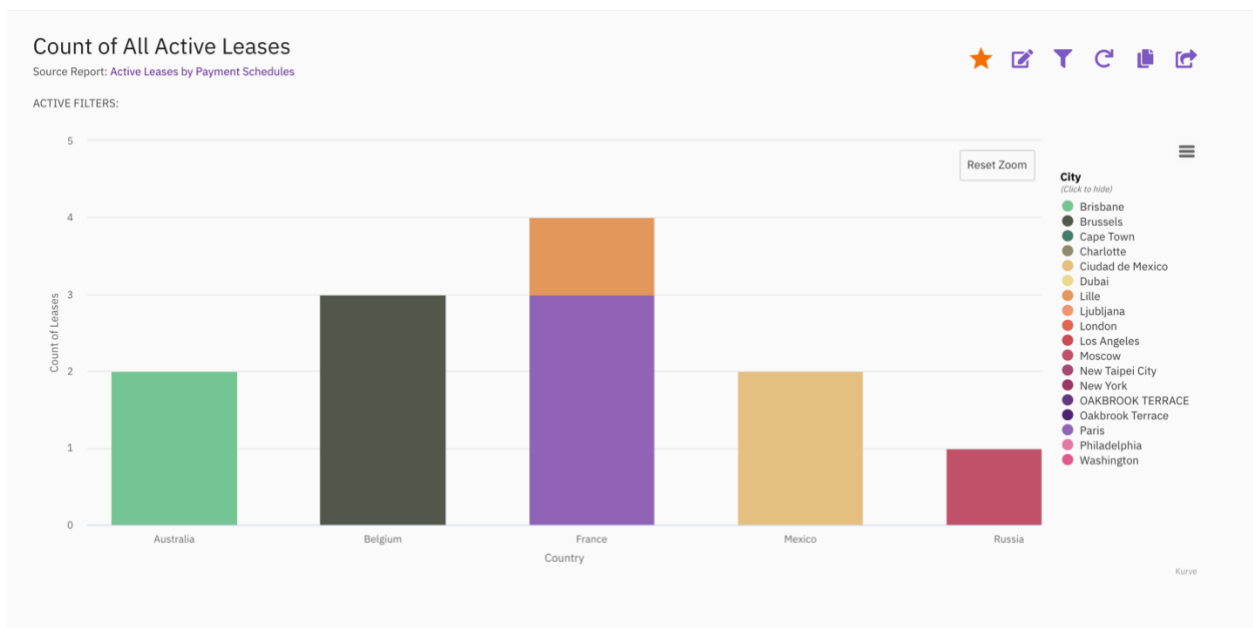


8. Clicking and Highlighting on Graphs to Zoom

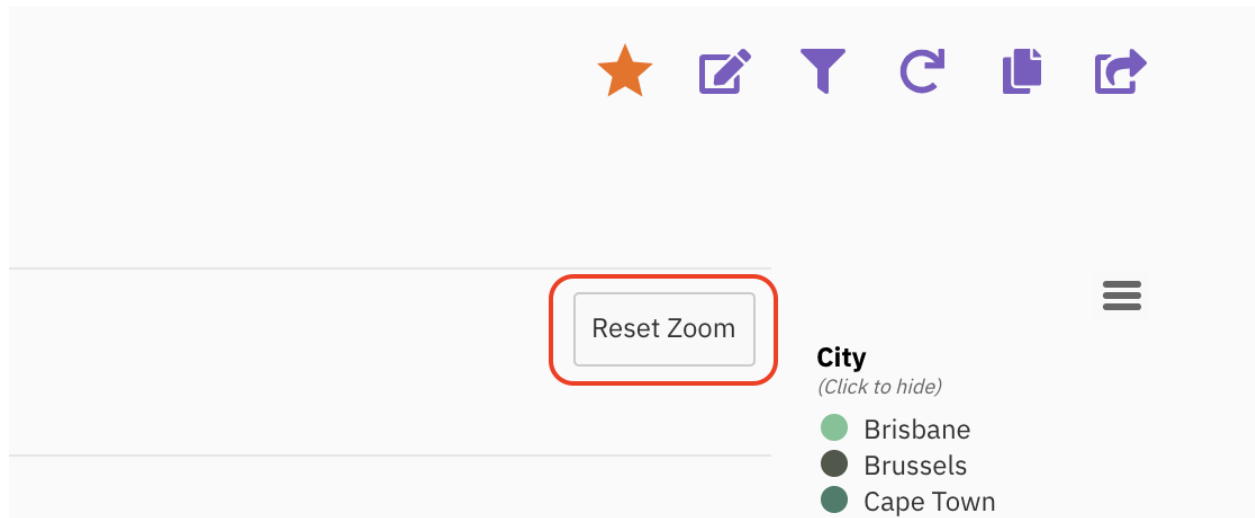
- Click and Highlight** Function: hover over the graph, then click and drag to highlight the part of the graph you would like to zoom into. You may highlight vertically or horizontally to click and drag on the graph to zoom.



b. The graph will zoom to what you highlighted:

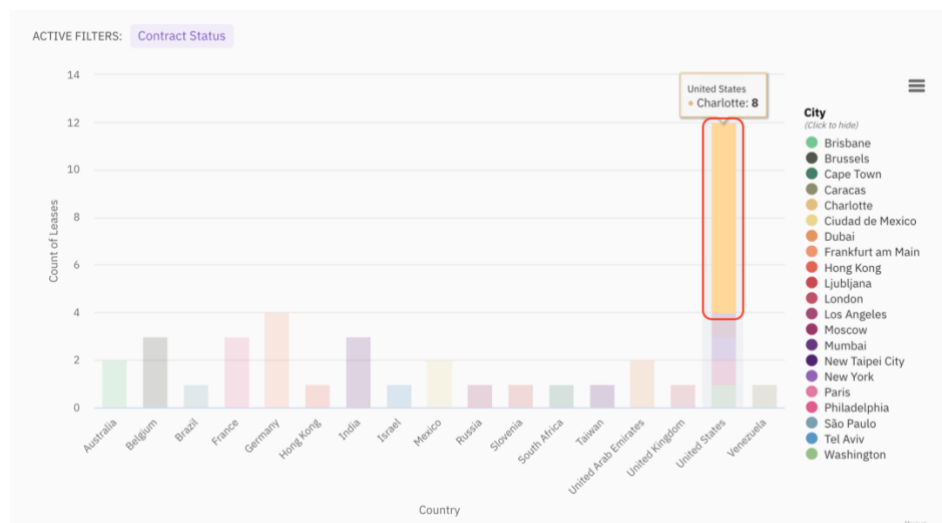


c. **Reset Zoom** Function: when you want the graph to reset to view all results of the graph, click “Reset Zoom.”



9. Navigating Through Graph Data

- a. A **tooltip** will appear as your mouse hovers over a column or point on the graph; information regarding the record will appear in the tooltip. It will also highlight that segment and any others that may have the same Color By value.



- b. **Click on the column** or segment on the graph to open the graph table associated with that record.



c. **Scroll** left or right to view the columns associated with the graph table.

Selected Records

Contract ID	Payment Schedule ID	Amount per Year	Contract Rentable	Cost per Unit	Payment Name	Payment Type
GPNA-US-IL-OP-001f	1007916	\$0.00	5800	\$0.00	Rent	Rent
GPNA-US-IL-OP-001f	1007906	\$120,000.00	5800	\$20.69	Rent	Rent
GPNA-US-IL-OP-001f	1007915	\$143,411.16	5800	\$24.73	Rent	Rent
GPNA-US-IL-OP-001f	1007914	\$140,599.13	5800	\$24.24	Rent	Rent
GPNA-US-IL-OP-001f	1007913	\$137,842.28	5800	\$23.77	Rent	Rent
GPNA-US-IL-OP-001f	1007912	\$135,139.49	5800	\$23.30	Rent	Rent
GPNA-US-IL-OP-001f	1007911	\$132,489.70	5800	\$22.84	Rent	Rent
GPNA-US-IL-OP-001f	1007910	\$129,891.86	5800	\$22.40	Rent	Rent
GPNA-US-IL-OP-001f	1007909	\$127,344.96	5800	\$21.96	Rent	Rent
GPNA-US-IL-OP-001f	1007908	\$124,848.00	5800	\$21.53	Rent	Rent
GPNA-US-IL-OP-001f	1007907	\$122,400.00	5800	\$21.10	Rent	Rent
GPNA-US-IL-OP-001e	1007938	\$0.00	5800	\$0.00	Rent	Rent
GPNA-US-IL-OP-001e	1007936	\$140,599.13	5800	\$24.24	Rent	Rent
GPNA-US-IL-OP-001e	1007935	\$137,842.28	5800	\$23.77	Rent	Rent
GPNA-US-IL-OP-001e	1007934	\$135,139.49	5800	\$23.30	Rent	Rent

1 to 100 of 149 Page 1 of 2

d. **Reorganize the columns** - click and drag the Column headers to where you would like to place the column on the table.


Selected Records

Name	Contract Status	Contract Type	Active Start Date	Active End Date	tb	City
Oakbrook Terrace Office B...		Real Estate Lease	01/01/2017	03/31/2027	3,741	Oakbrook Terrace
Oakbrook Terrace Office B...		Real Estate Lease	01/01/2017	03/31/2027	3,741	Oakbrook Terrace
Oakbrook Terrace Office B...		Real Estate Lease	01/01/2017	03/31/2027	3,741	Oakbrook Terrace
Oakbrook Terrace Office B...		Real Estate Lease	01/01/2017	03/31/2027	3,741	Oakbrook Terrace
Oakbrook Terrace Office B...		Real Estate Lease	01/01/2017	03/31/2027	3,741	Oakbrook Terrace
Oakbrook Terrace Office B...		Real Estate Lease	01/01/2017	03/31/2027	3,741	Oakbrook Terrace
Oakbrook Terrace Office B...		Real Estate Lease	01/01/2017	03/31/2027	3,741	Oakbrook Terrace
Oakbrook Terrace Office B...		Real Estate Lease	01/01/2017	03/31/2027	3,741	Oakbrook Terrace
Oakbrook Terrace Office B...		Real Estate Lease	01/01/2017	03/31/2027	3,741	Oakbrook Terrace
Oakbrook Terrace Office B...		Real Estate Lease	01/01/2017	03/31/2027	3,741	Oakbrook Terrace
Oakbrook Terrace Office B...		Real Estate Lease	01/01/2017	03/31/2027	3,741	Oakbrook Terrace
Oakbrook Terrace Office B...		Real Estate Lease	01/01/2017	03/31/2027	3,741	Oakbrook Terrace
Oakbrook Terrace Office B...		Real Estate Lease	01/01/2017	03/31/2027	3,741	Oakbrook Terrace
Oakbrook Terrace Office B...		Real Estate Lease	01/01/2017	03/31/2027	3,741	Oakbrook Terrace

1 to 100 of 149 Page 1 of 2

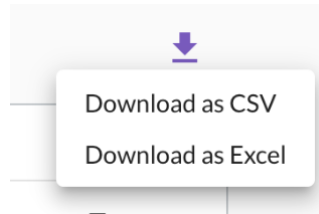
Selected Records

Name	Active Start Date	Contract Status	Contract Type	Active End Date	tb	City
Oakbrook Terrace Office B...	01/01/2017		Real Estate Lease	03/31/2027	3,741	Oakbrook Terrace
Oakbrook Terrace Office B...	01/01/2017		Real Estate Lease	03/31/2027	3,741	Oakbrook Terrace
Oakbrook Terrace Office B...	01/01/2017		Real Estate Lease	03/31/2027	3,741	Oakbrook Terrace
Oakbrook Terrace Office B...	01/01/2017		Real Estate Lease	03/31/2027	3,741	Oakbrook Terrace
Oakbrook Terrace Office B...	01/01/2017		Real Estate Lease	03/31/2027	3,741	Oakbrook Terrace

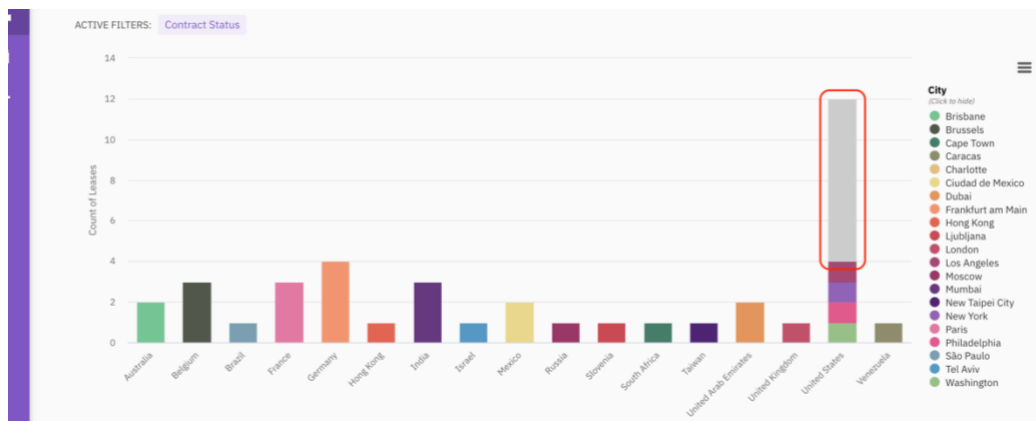
e. **Download Table of Records:** at the top right-hand corner above the table of records, there is a download icon (). Click to download as Excel or CSV.

Selected Records

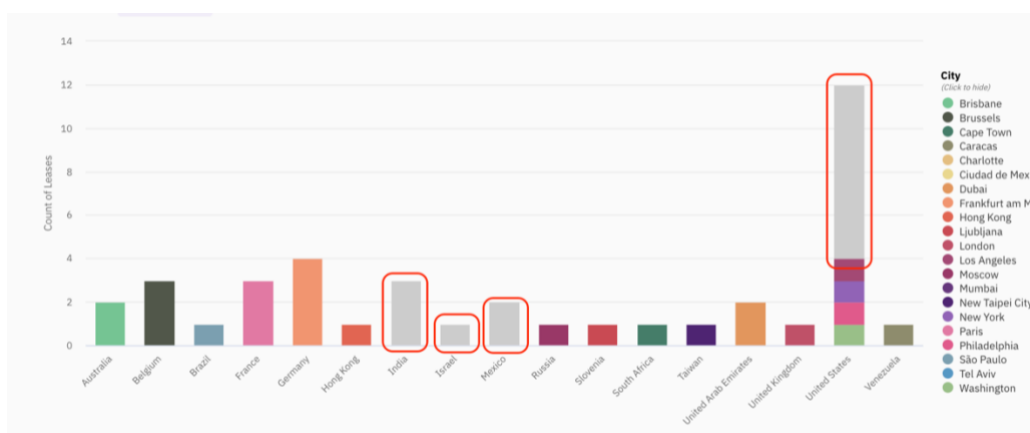
Name	Contract ID	Payment Schedule ID	Contract Status	Contract Type	Active End Date	Active S
Oakbrook Terrace Office B...	GPNA-US-IL-OP-001	1007796		Real Estate Lease	12/31/2026	01/0
Oakbrook Terrace Office B...	GPNA-US-IL-OP-001	1007814		Real Estate Lease	12/31/2026	01/0
Oakbrook Terrace Office B...	GPNA-US-IL-OP-001	1007813		Real Estate Lease	12/31/2026	01/0
Oakbrook Terrace Office B...	GPNA-US-IL-OP-001	1007812		Real Estate Lease	12/31/2026	01/0
Oakbrook Terrace Office B...	GPNA-US-IL-OP-001	1007811		Real Estate Lease	12/31/2026	01/0
Oakbrook Terrace Office B...	GPNA-US-IL-OP-001	1007810		Real Estate Lease	12/31/2026	01/0
Oakbrook Terrace Office B...	GPNA-US-IL-OP-001	1007809		Real Estate Lease	12/31/2026	01/0
Oakbrook Terrace Office B...	GPNA-US-IL-OP-001	1007808		Real Estate Lease	12/31/2026	01/0



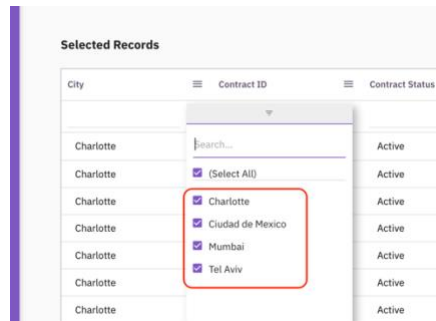
- f. **Multi-select** graph segments – select multiple sections of the graph to display in the table of records below the graph.
 - i. Navigate to your graph
 - ii. Select one segment of the graph



- iii. Hold *shift* on your keyboard and continue to select the segments you want to display. In the example below, I have selected Mumbai, Tel Aviv, Ciudad de Mexico, and Charlotte.

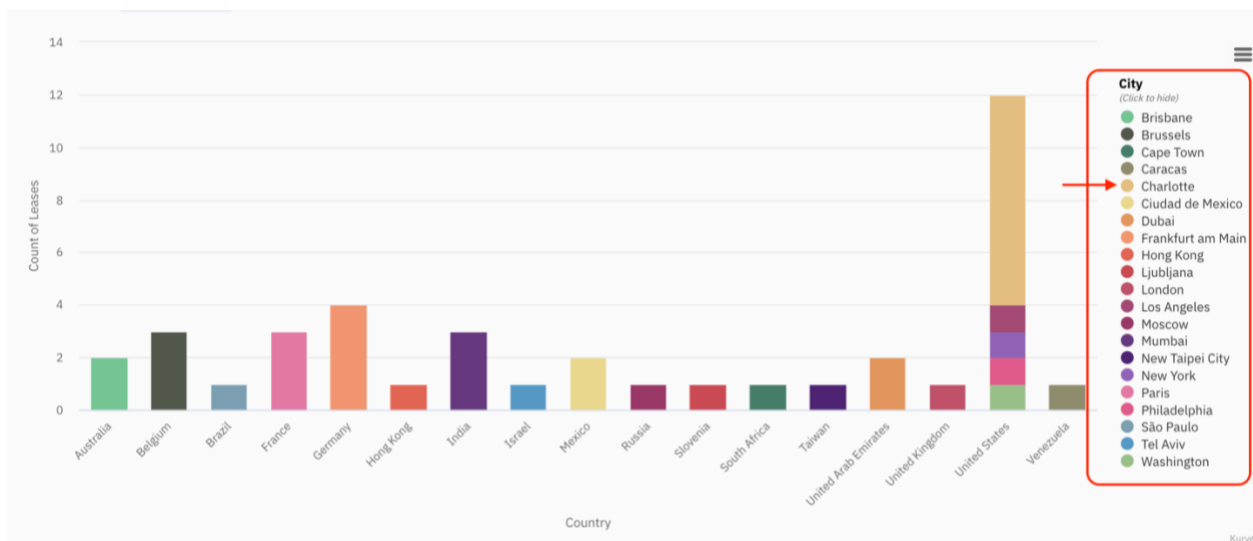


- iv. Now when I scroll to see my table of records, it will display all three cities rather than just one.

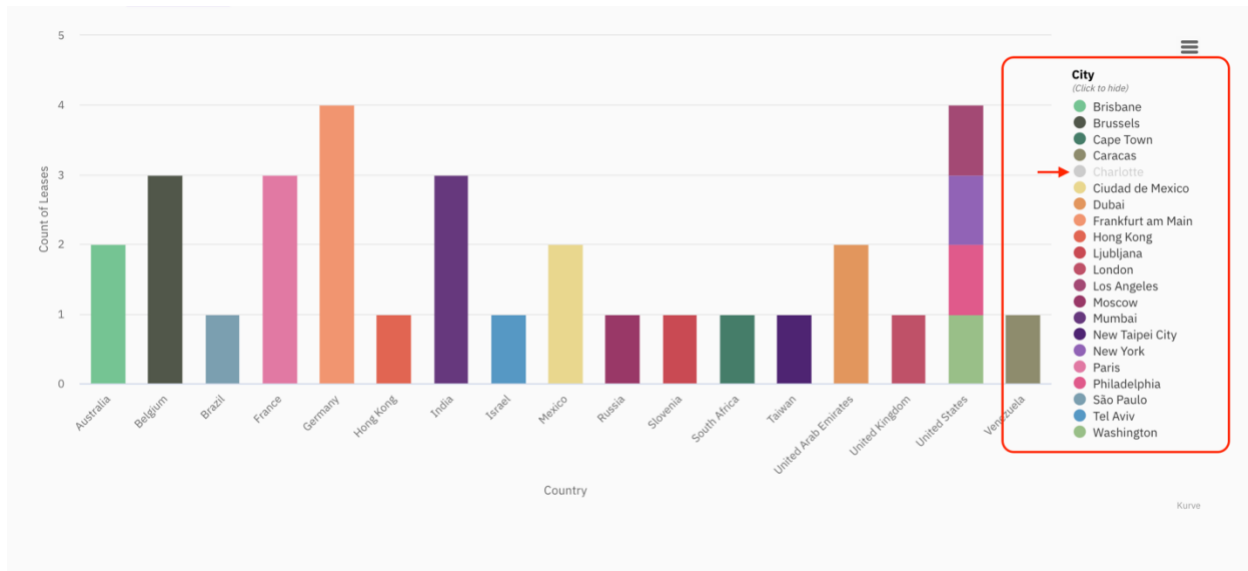


- g. **Hide variables from the graph** - from the colour legend located at the top right corner, click on the coloured dot of the property you would like to temporarily hide from the graph to view specific data.

Example: In this graph, if I click on the dot next to Charlotte, it will temporarily hide it from the graph.



Now the graph will only show all other lease data.

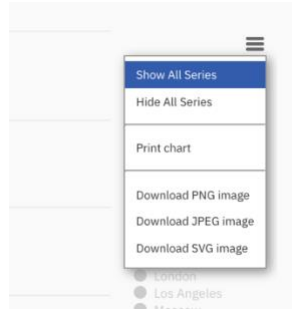


Note: The selected dot will turn light grey.


- Unhide variables** from the graph - Click the same coloured dot to unhide the property.
- Isolate one variable** from the graph – hold down shift on your keyboard and then select the variable you would like to isolate. For example, in the example below, I selected “Charlotte” which will isolate only that in my graph.



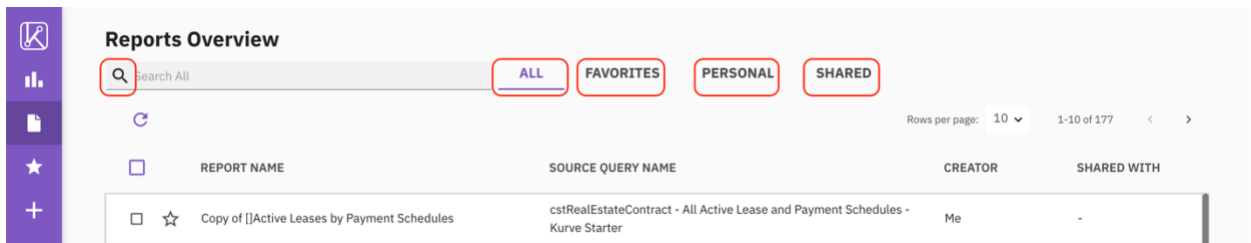
- To show all variables you can either re-click the circles or use the Show All Series button located in the menu (☰).




REPORTS PORTAL

From the Kurve Dashboard, click on the Reports Icon () to access the Reports Portal. This is where all created or shared reports can be accessed.


1. Navigating the Reports Portal



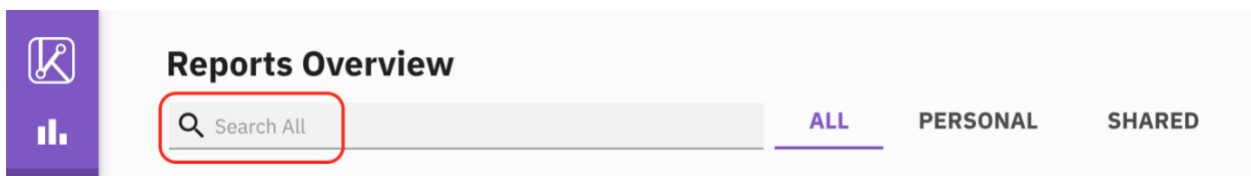
a. Features of the Reports' menu bar:

	Search	The search function.
-	ALL	All reports created or shared.
-	FAVOURITE	All of your favoured reports.
-	PERSONAL	Reports personally created by you.
-	SHARED	Reports shared to you by others.

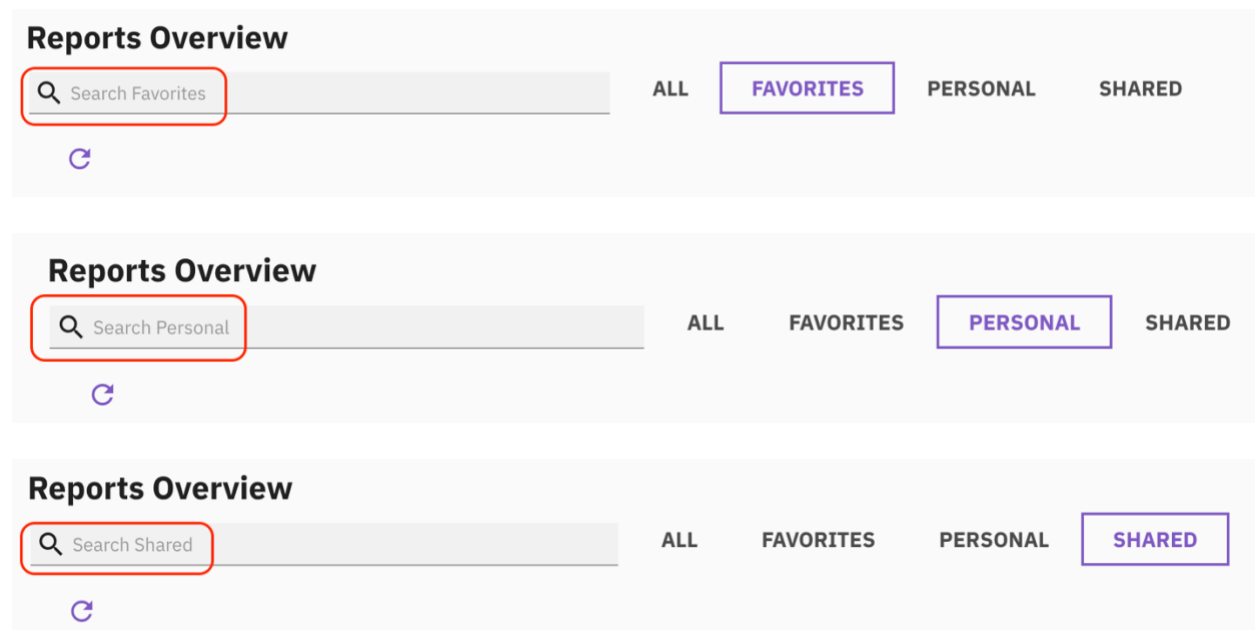
b. Functions of the Reports' menu bar:

- Search** (): This is your search function. Click on the magnifying glass symbol to expand the search bar and type to filter through the current list of reports.

Note: By default, the list of reports is sorted by created date, in descending order. The default search will filter through *All* Reports in the portal.



- If you want to search within the *Personal*, *Favorites*, or *Shared* tabs, simply click on either tab and click on the magnifying glass.



- c. **Sort** function: sort the graph results by clicking on one of the column headers. There are two sort options:
- Arrow facing up (↑) will sort your results in alphabetical order starting from “A.”
 - Arrow facing down (↓) will sort your results in reverse alphabetical order starting from “Z.”

The screenshot shows the 'Reports Overview' page with a table of reports. The table has four columns: REPORT NAME, SOURCE QUERY NAME, CREATOR, and SHARED WITH. The 'REPORT NAME' column header has an upward arrow icon and a 'Sort' button. The table contains three rows of report data.

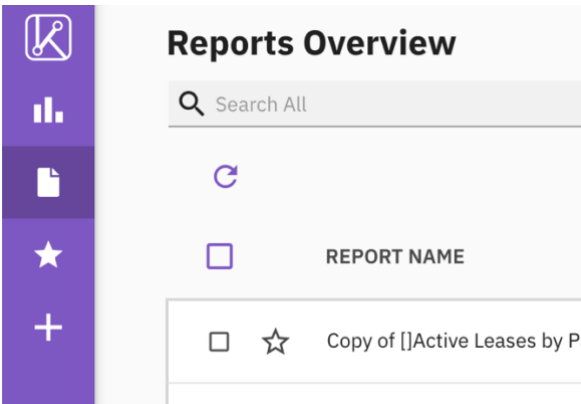
	REPORT NAME ↑	SOURCE QUERY NAME	CREATOR	SHARED WITH
<input type="checkbox"/> ☆	1.12 Capital Projects [AW]	cstCapitalProject - All Capital Projects Data with Contact Roles - Kurve Starter	Ashley Walter	1
<input type="checkbox"/> ☆	1.13 Test Report #1 Lauren	cstRealEstateContract - All Active Lease Data - Kurve Starter	Me	Public
<input type="checkbox"/> ☆	1.13 Test Report [AW]	cstRealEstateContract - All Active Lease Data - Kurve Starter	Ashley Walter	Public

2. Using Report Action Buttons

Personal and Shared Reports

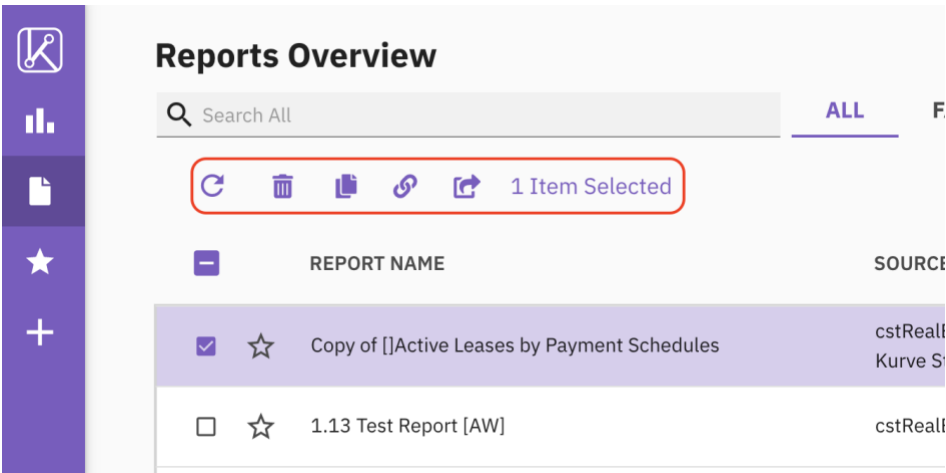
Kurve Admins have the same capabilities for their own reports and shared reports. Your batch action icons will change according to your current graph selections.

a. If you have no reports selected, your actions are as follows:





<input type="checkbox"/>	Select All	Select all reports on the page.
	Refresh	Refresh the page.

b. If you have selected ONE report, your options are:



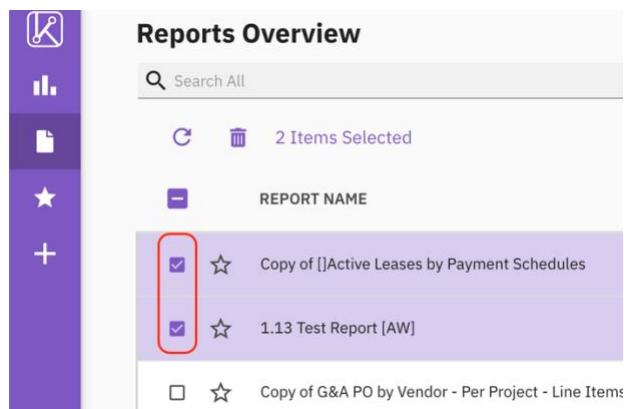
Features of the Report Actions Toolbar:

	Refresh	Refresh the page.
	Delete Report	Delete a report.
	Copy Report	Copy an existing report.

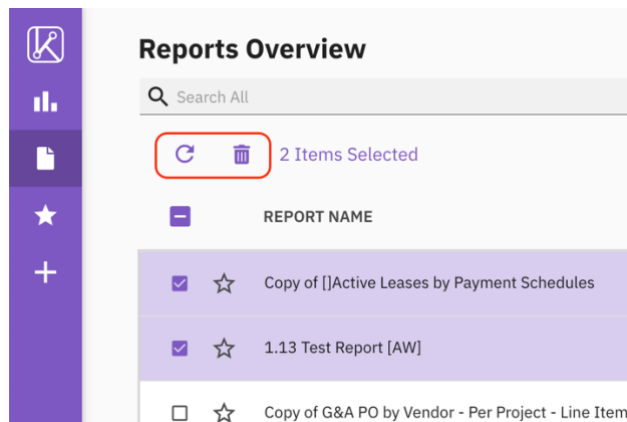
	Get Portal/Form URL	Get a Portal or Form URL to embed the report into a portal section or form tab.
	Change Shared Settings	Make changes to whom the report is shared with (public, private, or specific individuals).




c. More than one selected:

- i. **Select Report** Function: Select the report by clicking the white square (the selected square will be highlighted in purple as seen below). You are able to select one report or multiple reports.



d. Once selected, the toolbar will update with new icons.

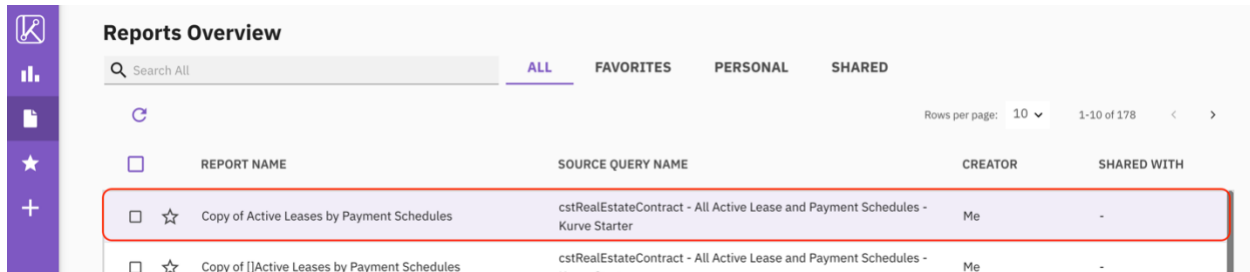


	Refresh	Refresh the page.
	Select	Unselect the reports that are currently selected.
	Delete	Delete the selected reports.

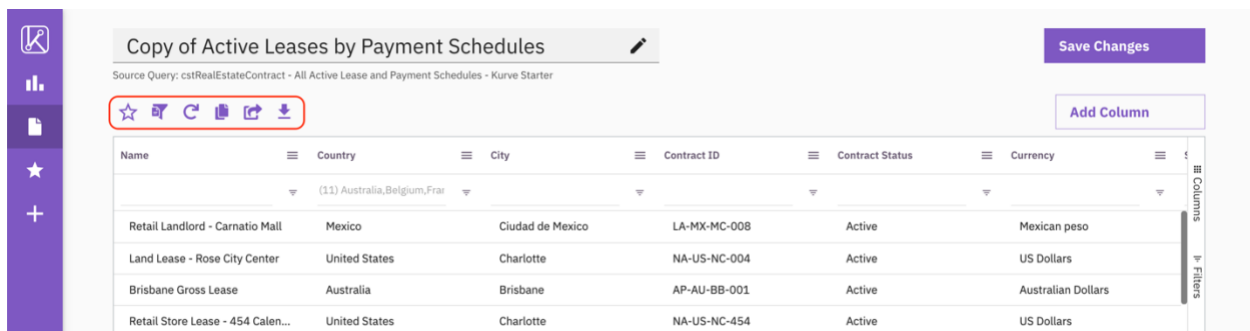
Note: Each feature listed above for the Reports Portal will function the same way as described under the Graphs Portal Section 2.

3. Using a Specific Report's Toolbar






- a. Open a report by clicking on the text link of the report.




- b. The Report will open with column headings and data.




- c. Features of the Report's toolbar:

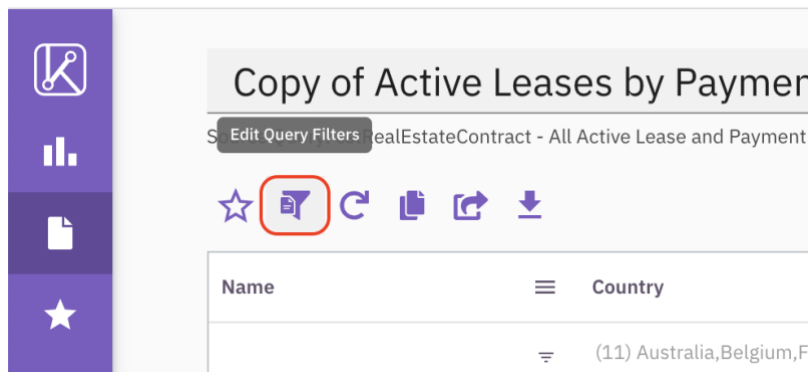
	Favorite Report	Favorite a report for easy access on your home page or the favorites page.
	Edit Query Filters	Create and apply filters before loading your report.
	Refresh Data	Refresh the data in your report without having to refresh and reload the whole page. Or refresh the query filter values currently being applied.
	Copy Report	Click to copy the opened report.
	Change Share Settings	Click to edit who the report is shared with (public, private, or specific individuals or security groups).

	Download as CSV	Click to download a CSV or Excel copy of the opened report.
-----------------------------------------------------------------------------------	-----------------	-------------------------------------------------------------

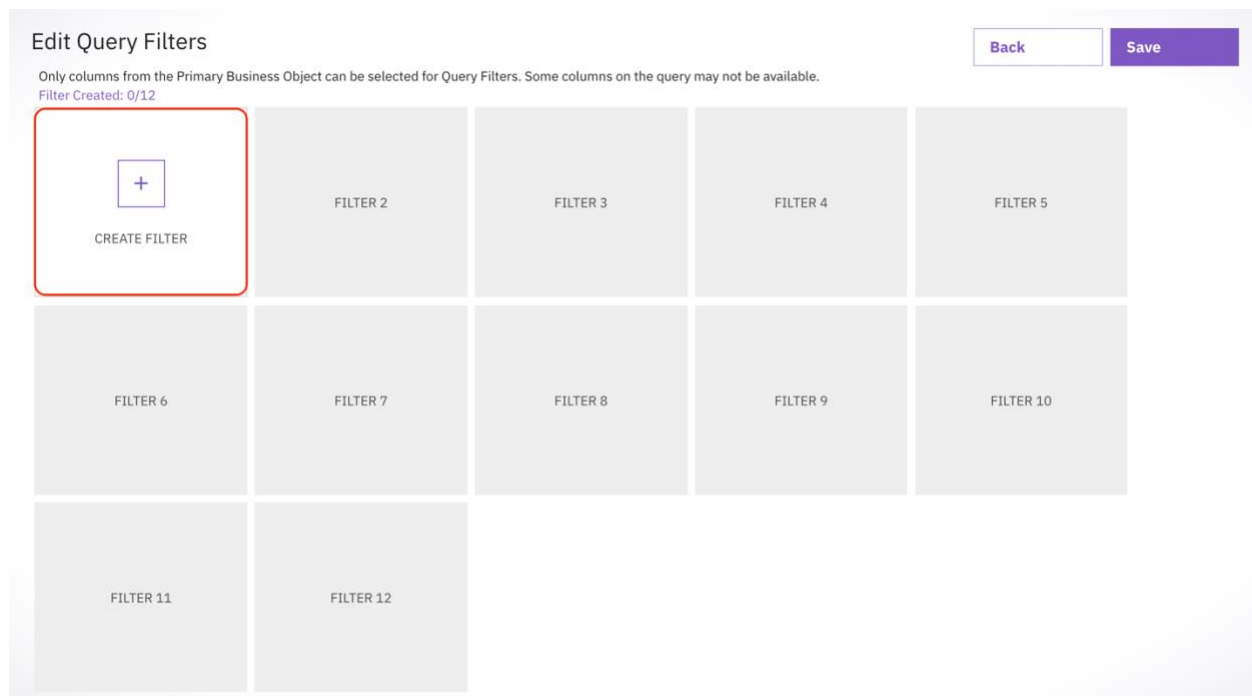
4. Edit Query Filters

You will see in Section 3 how to create query filters upon creating the initial graph. After the graph has been created, you can click the edit query filter button () to edit them.

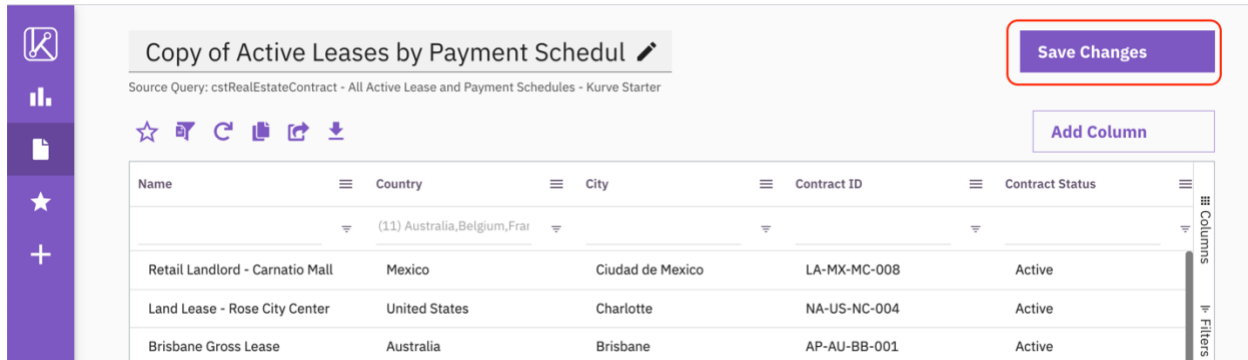
- Click the Edit Query Filters button from the toolbar



- Create or Edit your query filters and press Save.



- c. To save changes made in the Edit Query Filter page, you must click Save Changes in your report.



Copy of Active Leases by Payment Schedule

Source Query: cstRealEstateContract - All Active Lease and Payment Schedules - Kurve Starter

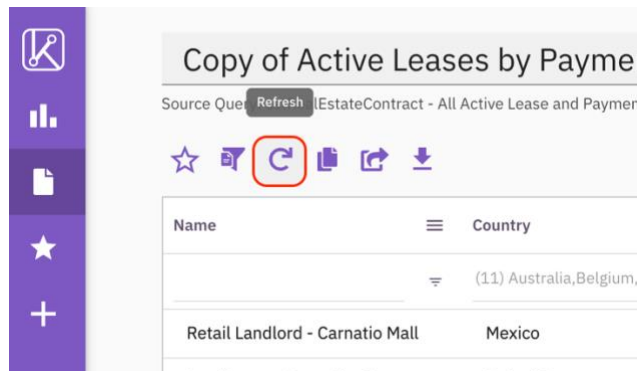
Save Changes

Add Column

Name	Country	City	Contract ID	Contract Status
	(11) Australia,Belgium,Fra			
Retail Landlord - Carnatio Mall	Mexico	Ciudad de Mexico	LA-MX-MC-008	Active
Land Lease - Rose City Center	United States	Charlotte	NA-US-NC-004	Active
Brisbane Gross Lease	Australia	Brisbane	AP-AU-BB-001	Active

5. Refresh Data

You can click this button to refresh all data in your report without losing any filters applied and/or change the query filter value being applied to the report.



Copy of Active Leases by Payment Schedule

Source Query: **Refresh** cstRealEstateContract - All Active Lease and Payment Schedules - Kurve Starter

Refresh

Name	Country
	(11) Australia,Belgium,Fra
Retail Landlord - Carnatio Mall	Mexico

- If you do not have query filters created: the report will refresh with the most up-to-date information
- If you have report filters created: you can edit the values or click Skip if you simply want to refresh the data

Enter Query Filter value(s)
Values are case-sensitive

State/Province

Equals

Cancel

Skip

6. Adding Columns on Report

- a. Click “Add Columns” to add a custom column with the existing data to the report.

Payment Schedules

Save Changes

Add Column

	Payment Schedule ID	Name	Contract Status
llars		New York Office Landlord ...	Active
		Paris Lease (Finance Leas...	Active

- b. The first window that will open will ask you to select a data type for the new column. This selection will set the filter type for this column and how the values are presented.

Select Data Type for New Column

abc


A Text Column uses a Set filter, allowing users to select specific values to show or hide

Text

123


A Number Column allows for numerical filters such as Greater/Less Than, and is the required type for most aggregations

Number




A Date Column allows the use of Before/After or Range filters to isolate desired date ranges

Date



A Date Time Column allows the use of Before/After or Range filters to isolate desired date time ranges

DateTime



A Color Column will convert color names or hex color codes and display a cell filled with the given color

Color

Close

Continue

- c. Once selected, press Continue. Or if you would like to exit out of the window, click Close.

Select Data Type for New Column

Close **Continue**

A Text Column uses a Set filter, allowing users to select specific values to show or hide

Text

A Number Column allows for numerical filters such as Greater/Less Than, and is the required type for most aggregations

Number

A Date Column allows the use of Before/After or Range filters to isolate desired date ranges

Date

A Date Time Column allows the use of Before/After or Range filters to isolate desired date time ranges

DateTime

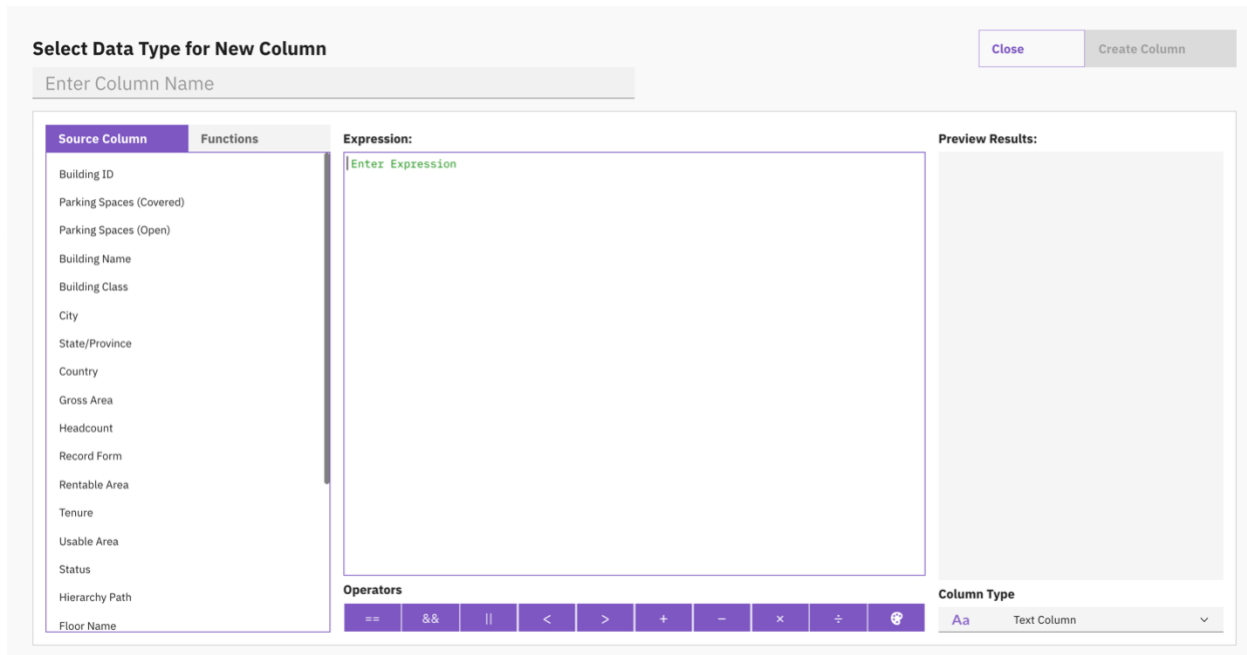
A Color Column will convert color names or hex color codes and display a cell filled with the given color

Color

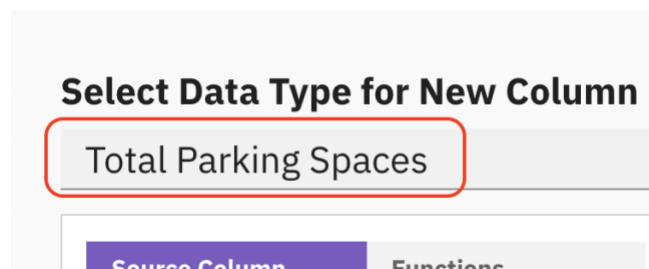
Note: Kurve will automatically change the display type and filters for the column according to the data type selected.

Column Type	Description
Text Column	Text columns should be used for alphabetic characters. For example, if you are creating a column to display months, it would be a text column displaying months January through December based on the source column. A text column will filter for unique values.
Number Column	A number column would be used for columns that will result in numeric characters. For example, if you are calculating a percentage you would use a number column. Using a number column will allow you to filter by greater than, less than, equal to, not equal to, etc.
Date Column	A date column will be used for all custom columns involving dates. For example, if you are adding a column to show Today's Date, the column type would be Date. A date column filter will provide a calendar for you to choose what you would like to filter for.
Date/Time Column	A date/time column will be used for all custom columns involving dates in which the source column has the time of day as well. For example, 10/09/2018 12:01:47. A date/time column filter will provide a calendar and time selection for you to choose what you would like to filter for.
Colour Column	Colour columns are used for colour coding specific columns. Any new column can be colored. For guidance on Custom Colours please view Appendix B.

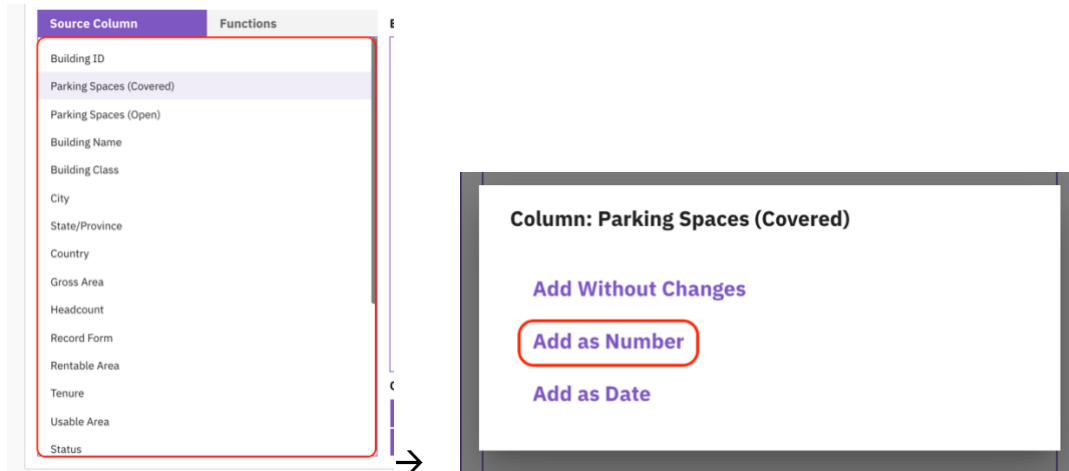
- d. Once you press Continue, the Create Custom Column window will open.



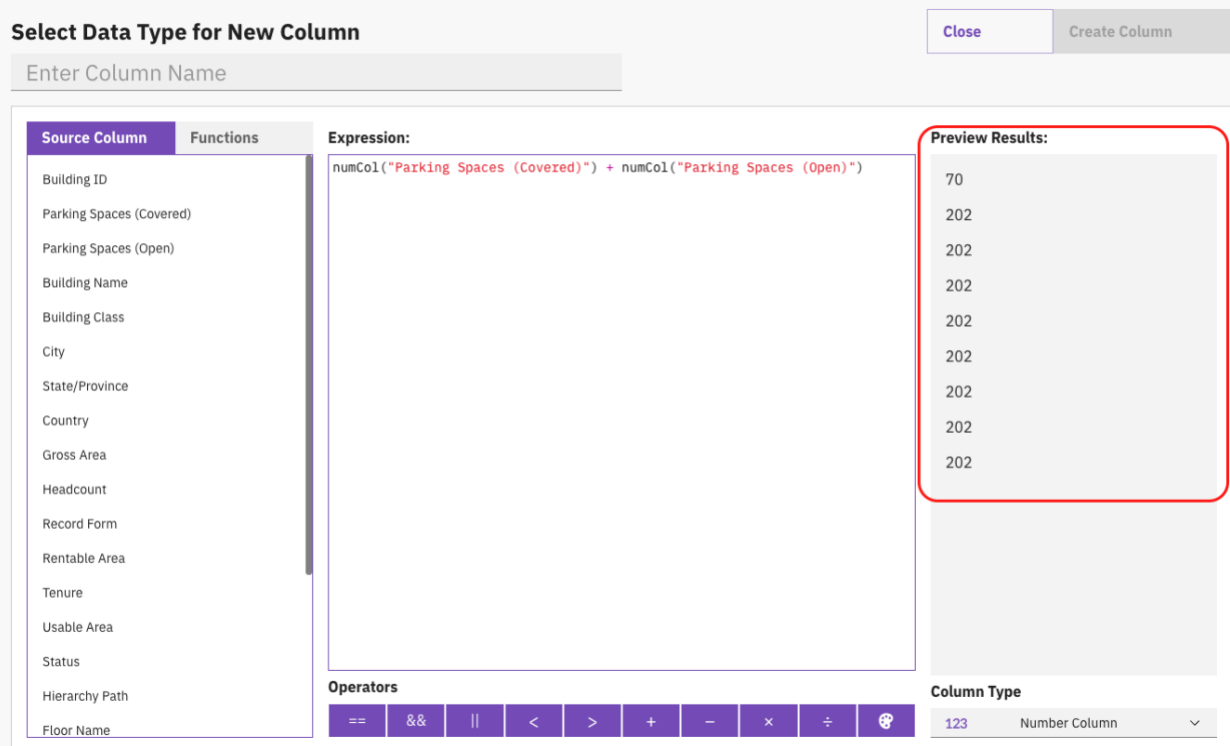
- e. Type the name of the custom column under “Enter Column Name.” Once the column is created this column name cannot be changed. In this example, we will calculate the number of parking spaces.



- f. Under the Source Column section, select the column(s) you would like to use for the custom column. A pop-up will open to select how you would like the item to appear (Add without changes, Add as number, Add as date). Select the column type. In our example, we select Add as Number.



g. The data in the selected column will now show in the “Preview Results” .













- h. The selected column will appear as an expression under the “Expression” section. You can then continue your expression.

The screenshot shows the Kurve Admin interface for creating a custom column. On the left, a list of 'Source Column' options includes 'Building ID', 'Parking Spaces (Covered)', 'Parking Spaces (Open)', 'Building Name', 'Building Class', 'City', 'State/Province', 'Country', 'Gross Area', 'Headcount', 'Record Form', 'Rentable Area', and 'Tenure'. The 'Expression' field is populated with the formula: `numCol("Parking Spaces (Covered)") + numCol("Parking Spaces (Open)")`. The 'Preview Results' column displays a list of values: 70, 202, 202, 202, 202, 202, 202, 202, 202, 202. The 'Operators' section at the bottom provides a palette of mathematical and logical symbols: `==`, `&&`, `||`, `<`, `>`, `+`, `-`, `x`, `÷`, and a color picker icon. The 'Column Type' is set to 'Number Column' with a value of 123.

Example: In this case, the “Parking Spaces (Open)” column is being added to the “Parking Spaces (Closed)” column, therefore the “Expression” is “*numCol('Parking Spaces (Open)')+numCol('Parking Spaces (Covered)')*”. This adds our two columns together thus calculating total parking spaces.

Note: We have helper **Operators** to assist with any calculations you would like to do. Click any to add it into the expression in the correct format for the custom column.

	Equals
	And
	Or
	Less Than
	Greater Than
	Add
	Subtract
	Multiply
	Divide
	Color Picker: helpful tool to choose colors when doing color columns

- i. Once you are happy with your expression, click “Create Column”. The window will close and your custom column will appear as a new column on the report.

Select Data Type for New Column

Total Parking Spaces

Source Column

- Building ID
- Parking Spaces (Covered)
- Parking Spaces (Open)
- Building Name
- Building Class
- City
- State/Province
- Country
- Gross Area
- Headcount
- Record Form
- Rentable Area
- Tenure
- Usable Area
- Status
- Hierarchy Path
- Floor Name

Functions

Expression:

```
numCol("Parking Spaces (Covered)") + numCol("Parking Spaces (Open)")
```

Operators

== && || < > + - × ÷

Preview Results:

70
202
202
202
202
202
202
202
202
202

Column Type

123 Number Column

Close Create Column

- j. At any time, you may also exit out of the “Create Custom Column” page by clicking on the Close icon.

Select Data Type for New Column

Total Parking Spaces

Source Column

- Building ID
- Parking Spaces (Covered)
- Parking Spaces (Open)

Functions

Expression:


```
numCol("Parking Spaces (Covered)") + numCol("Parking Spaces (Open)")
```

Preview Results:





70
202
202

Close Create Column

- k. Once you click Create Column, the column will appear at the very end of your report (scroll to the right). Custom columns will be coloured purple to indicate that it's custom.

All Buildings 

Query: cstBuilding - All Buildings with Space and Floor Capacity


Add Column

Save Changes





Space Capacity	System Full Path	Area Units	Total Parking Spaces
0	\Locations\Offices\Asia ...	square-meters	32
1	\Locations\Offices\Asia ...	square-meters	32
1	\Locations\Offices\Asia ...	square-meters	32
0	\Locations\Offices\Middl...	square-meters	32
1	\Locations\Offices\Middl...	square-meters	32
1	\Locations\Offices\Middl...	square-meters	32
0	\Locations\Offices\North...	square-feet	28
0	\Locations\Offices\North...	square-feet	28
0	\Locations\Offices\North...	square-feet	28
1	\Locations\Offices\Centr...	square-meters	50

1 to 47 of 47 < > Page 1 of 1

Changes to the report (including new custom columns) will not be saved until you have clicked “Save Changes.”

All Buildings 

Query: cstBuilding - All Buildings with Space and Floor Capacity

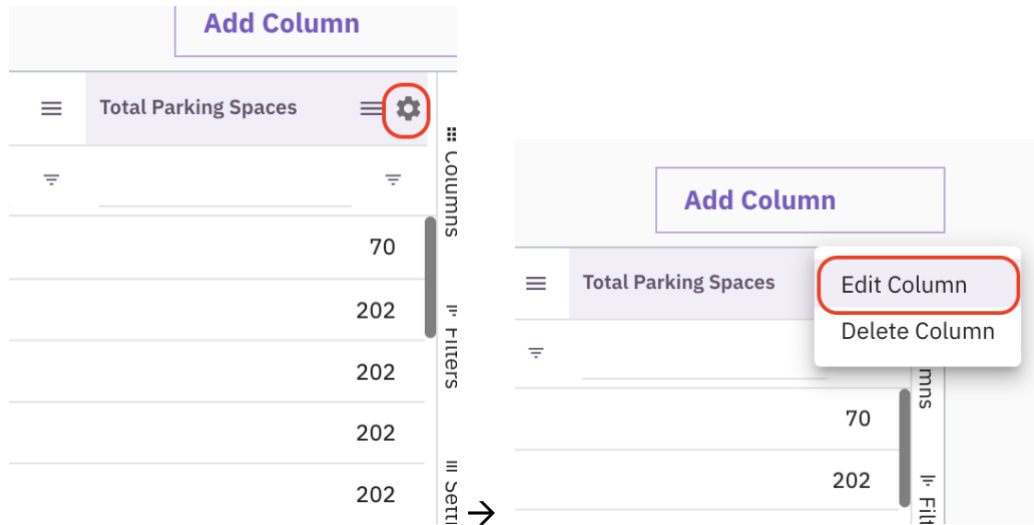
   

Add Column

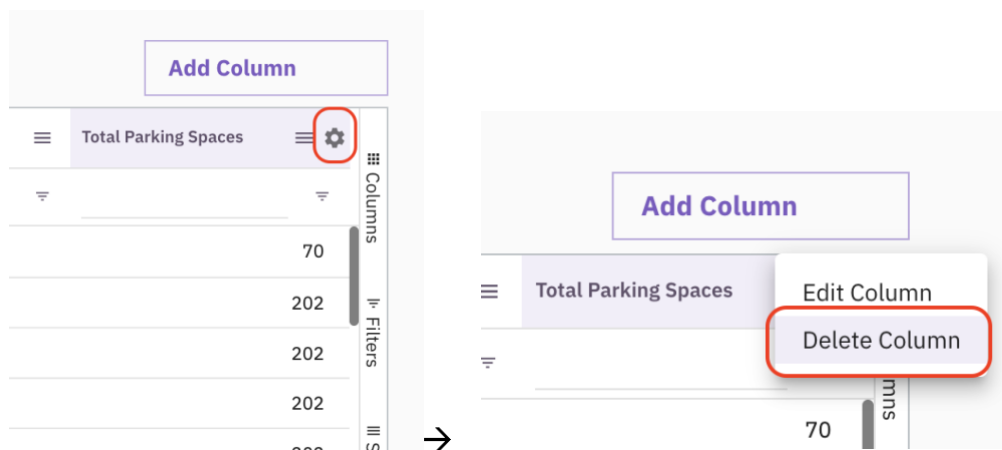
Save Changes

Space Capacity	System Full Path	Area Units	Total Parking Spaces
0	\Locations\Offices\Asia ...	square-meters	32
1	\Locations\Offices\Asia ...	square-meters	32
1	\Locations\Offices\Asia ...	square-meters	32
0	\Locations\Offices\Middl...	square-meters	32
1	\Locations\Offices\Middl...	square-meters	32

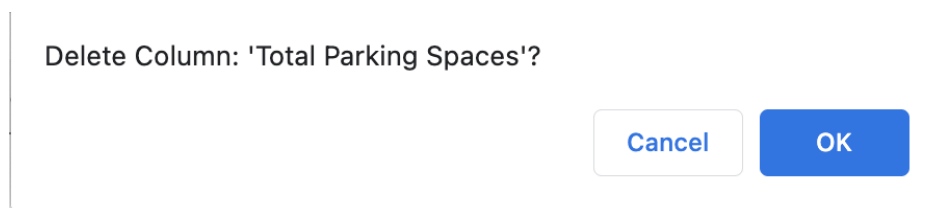
- I. To edit the custom column, click the gear icon next to the hamburger menu of the custom column. A secondary menu will appear, click Edit Column.



- m. Delete Custom Column: To delete a custom column, click into the gear icon in the custom column you would like to delete. Then select Delete Column.



- i. A pop-up will appear to confirm you would like to delete the column. Click OK to delete, or cancel to keep.



- ii. Save Changes to save any adjustments that were made.

- n. For more complex expressions, Kurve comes with many helper functions that can be viewed by clicking on the “Functions” tab. A detailed list of functions can also be found in the Appendix.

Create Custom Column Close Create Column

Enter Column Name

Source Column **Functions**

Expression:

Enter Expression

Preview Results:

Operators

Column Type

Aa Text Column

Example: To calculate the number of days between two dates use the DaysBetween function. To select the function, hover over the title and click it.

Source Column **Functions**

days between

Date Functions

DaysBetween(date1, date2)
Returns # of days between two given dates.

The expression will be added to the Expression tab.

Expression:

```
DaysBetween(date1, date2)
```

Now you can select your variables. When selecting them from the source column, ensure you add the field as a date.

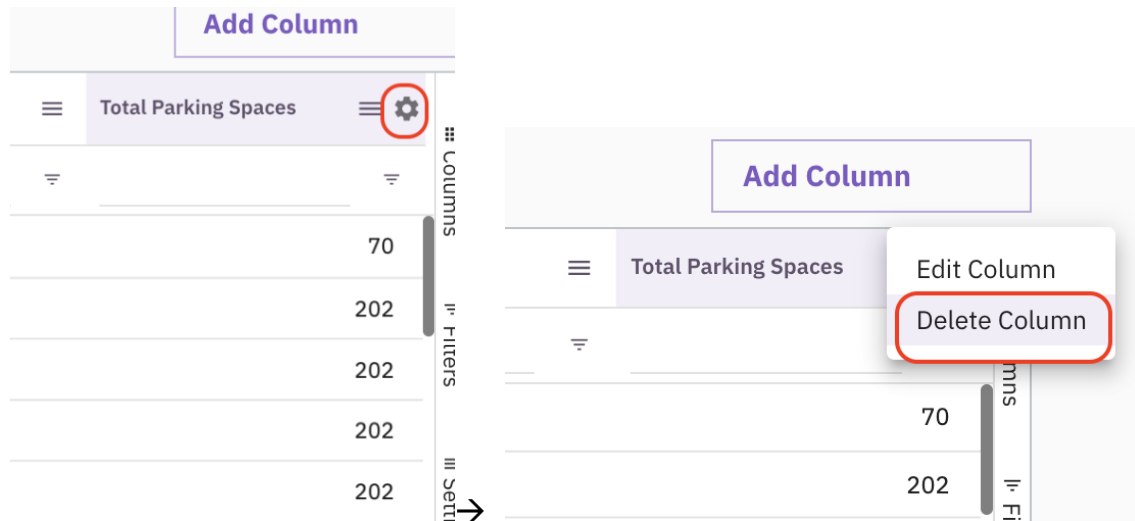
Replace the “date 1” with the first date field. For Date 2, select the other date. You could use functions within functions. For example, if we choose Today() as Date 1, this will calculate the days between Today and the project end date.

Expression:

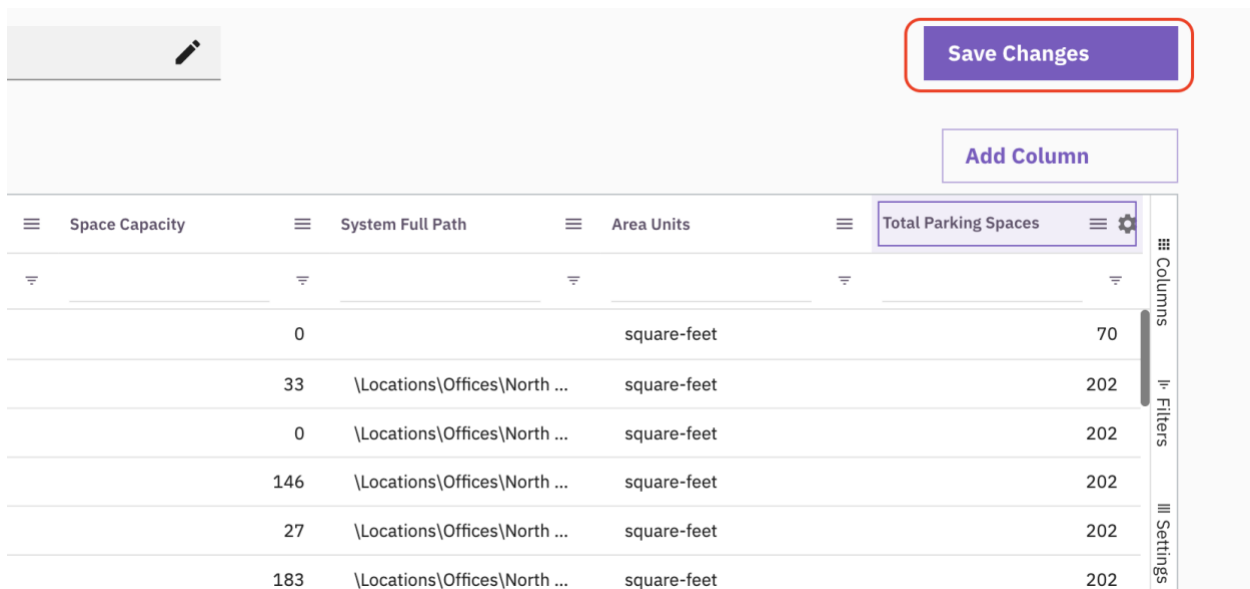
```
DaysBetween(Today(), dateCol("Project Plan End"))
```

o. Delete Custom Column

- i. To delete a custom column, click the gear icon and then click Delete Column.



- p. Save: Click Save Changes to ensure anything you have done to the report gets saved.



7. Personalizing Columns on the Report

- a. On the right side of the webpage, click on the “Columns” bar. Here you can select what columns to show on the report.

Active Leases by Payment Schedules

Query: cstRealEstateContract - All Active Lease and Payment Schedules - Kurve Starter

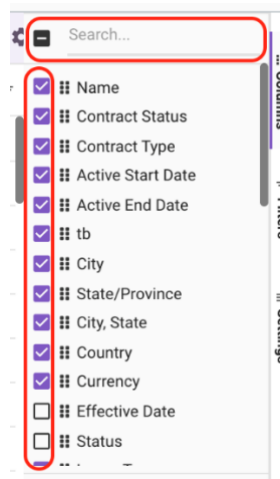
Save Changes

Add Column

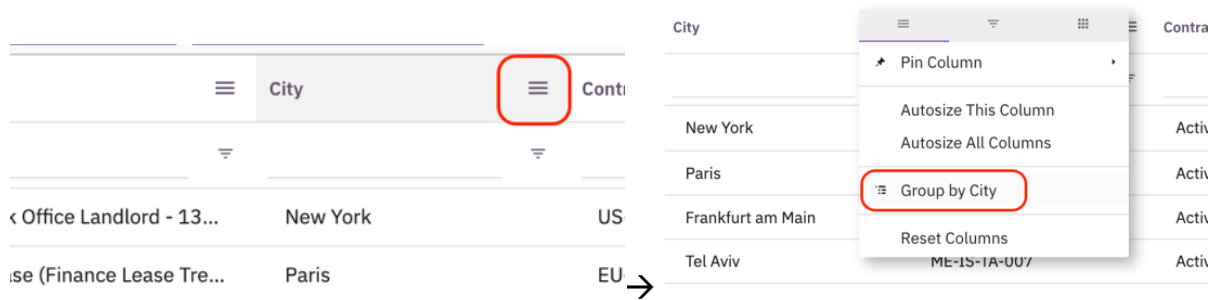
act ID	Currency	Payment Schedule ID	Name	Contract Status	Contract Type	Active
NY-NY-002	US Dollars		New York Office Landlord ...	Active	Owned Property	
FR-PR-006	Euro		Paris Lease (Finance Leas...	Active	Real Estate Lease	12
DE-FR-001	Euro		Watson Centre - Frankfurt	Active	Real Estate Lease	01
IS-TA-007	US Dollars		Tel Aviv Gross Lease	Active	Real Estate Lease	05
BR-SP-001	Brazilian real		Watson Center - Sao Paulo	Active	Real Estate Lease	01
CH-HK-001	Hong Kong Dollar		Watson Center - Hong Ko...	Active	Real Estate Lease	01
SA-CT-002	South African Rand		Cape Town Office Landlor...	Active	Owned Property	
AU-BR-002	Australian Dollars		Brisbane Office Landlord -...	Active	Owned Property	
SL-LJ-002	Euro		Ljubljana Office Landlord -...	Active	Owned Property	
IN-MB-003	Indian Rupees		Mumbai Owned Land Parc...	Active	Owned Property	
VZ-CA-002	Venezuelan bolivar		Caracas Office Landlord - ...	Active	Owned Property	
BG-BR-003	Euro		Brussels Land Parcel - Re...	Active	Owned Property	

1 to 58 of 58 Page 1 of 1

- b. A side panel will open beside the “Columns” bar. Type into “Search...” text box or select/deselect columns to keep/hide from the report.




- c. **Row Groups** function: There are two methods of grouping data.
- Option 1:** Click on the menu icon located next to the column you would like to group. Click on the “Group by City” button.



- d. The report will group by the column you have selected and automatically pin that column left.

Group	Active End Date	Active Start Date	City
New York (1)		03/14/2013	New York
Paris (3)	12/31/2018	01/01/2014	Paris
		03/14/2013	Paris
		03/14/2013	Paris
Frankfurt am Main (4)	01/31/2021	02/01/2012	Frankfurt am Main

Note: In this example, each item from “City” is grouped and beside each item, there is a number to show how many items are in that one group. (Example: for “New Work (1)” this shows that there is 1 record with the city New York.

- e. **Option 2:** Click and drag the column header into the “Row Groups” section on the side panel. There are two options to drag the column header from:
- Option 1: From the report (see image below)
 - Option 2: From the Columns side panel, click and drag the icon () from the Columns section (see image below).

Option 1

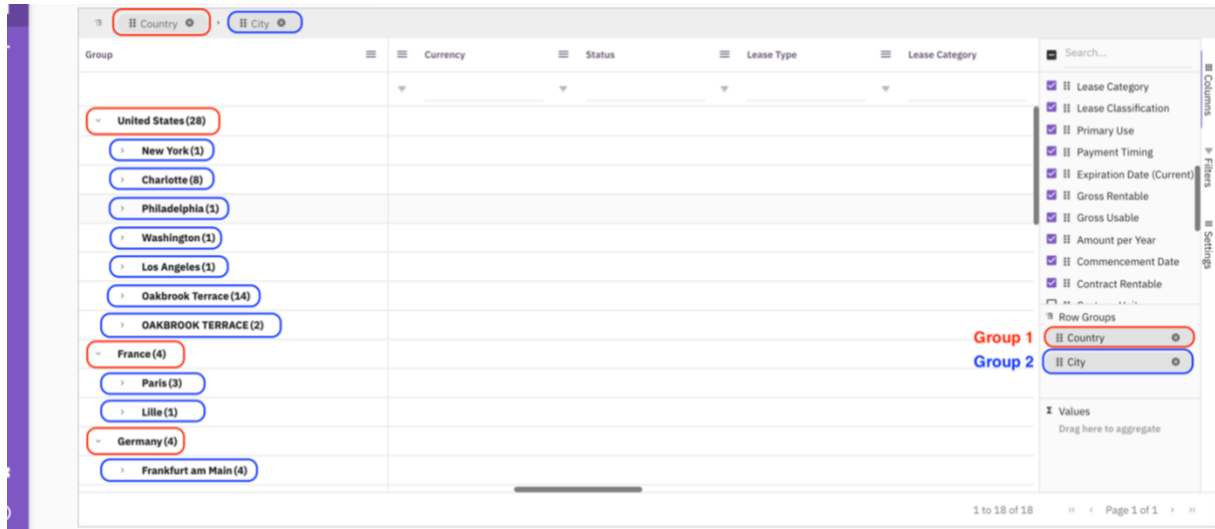
Active End Date	Active Start Date	City	State/Province	Country
	03/14/2013	New York	New York	United States
12/31/2018	01/01/2014	Paris	Paris	France
01/31/2021	02/01/2012	Frankfurt am Main	Hesse	Germany
05/13/2016	05/14/2011	Tel Aviv	Tel Aviv	Israel
01/31/2017	02/01/2012	São Paulo	São Paulo	Brazil
01/31/2017	02/01/2012	Hong Kong	Hong Kong Island	Hong Kong
	03/14/2013	Cape Town	Western Cape	South Africa
	03/14/2013	Brisbane	Queensland	Australia
	03/14/2013	Ljubljana	Central Slovenia	Slovenia
	03/14/2013	Mumbai	Maharashtra	India
	03/14/2013	Caracas	Capital District	Venezuela
	03/14/2013	Brussels	Brussels	Belgium



1 to 58 of 58 Page 1 of 1

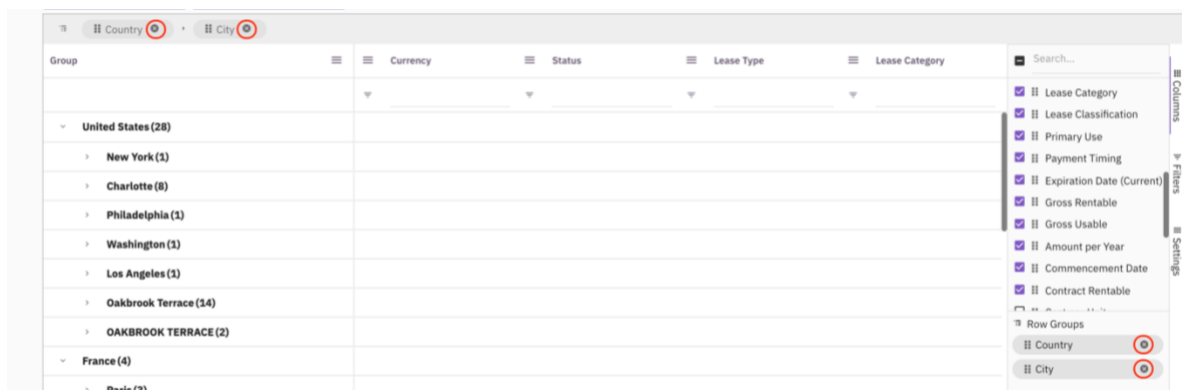
Group	Active End Date	Active Start Date	City	State/Province
New York (1)		03/14/2013	New York	New York
Paris (3)	12/31/2018	01/01/2014	Paris	Paris
		03/14/2013	Paris	Paris
		03/14/2013	Paris	Paris
Frankfurt am Main (4)	01/31/2021	02/01/2012	Frankfurt am Main	Hesse
	01/31/2017	02/01/2012	Frankfurt am Main	Hesse

- f. **Row Groups Hierarchy** function: When you have more than one column in the “Row Groups” section, the order of columns in the section determines the order in which the rows are grouped.

Example: In this case, “Country” is the first column in the section, and “City” is next. In the report, items will first be grouped by the “Country” and then within each name, it will group by the “City.”



- i. **Reorder Hierarchy of Row Groups** function: Click on the reorder icon () and drag the column header up or down to change the order of the hierarchy for the grouping on the report.
- g. **Delete Row Groups** function: Click on one of the exit icon () to delete the row group from the section.



Note about Blanks: When you group by a column, for example “Primary Use”, some records do not have a Primary Use, those records will group together.

Group	Contract ID	Payment Schedule ID	Name
▼ (13)	NA-US-NC-TERM-01	1007755	Storag
	GP-EU-FR-PA-OP-001	1008003	Lille Oi
	GP-EU-FR-PA-OP-001	1008002	Lille Oi

If your blanks do not get grouped together like the above, you may need to use a custom column to ensure the blanks can be grouped together. Use the Function “GroupNulls” and then group your report by this column.

For example, when I group my report by Payment Description, my top rows don’t have any grouping, this may be because the records are being treated as null rather than empty strings. I will create a custom column with the function GroupNulls(col(“Payment Description”)) as the expression.

EDIT CUSTOM COLUMN

Payment Desc.

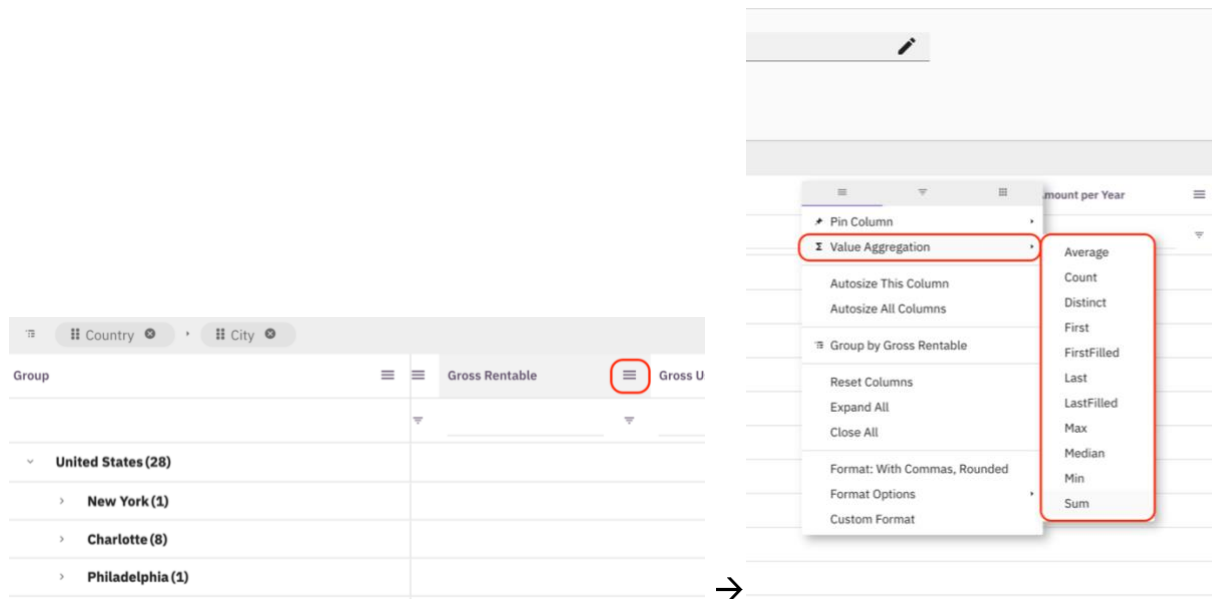
Expression: Preview

Now the report can be grouped by the custom column and all blanks will be grouped together.

Group	Contract ID	Payment Schedule ID
▼ (56)	EU-FR-PR-006	
	EU-DE-FR-001	1002193
	EU-DE-FR-001	1002194
	EU-DE-FR-001	1002196
	EU-DE-FR-001	1002195
	EU-DE-FR-001	1002197

- h. Value Aggregation** function: There are two options to aggregate your data. You can aggregate your data based on what you have grouped your data by:

- i. Option 1: click the hamburger menu of the column you would like aggregate. Hover over Value Aggregation, then click to select which aggregation you would like to use.

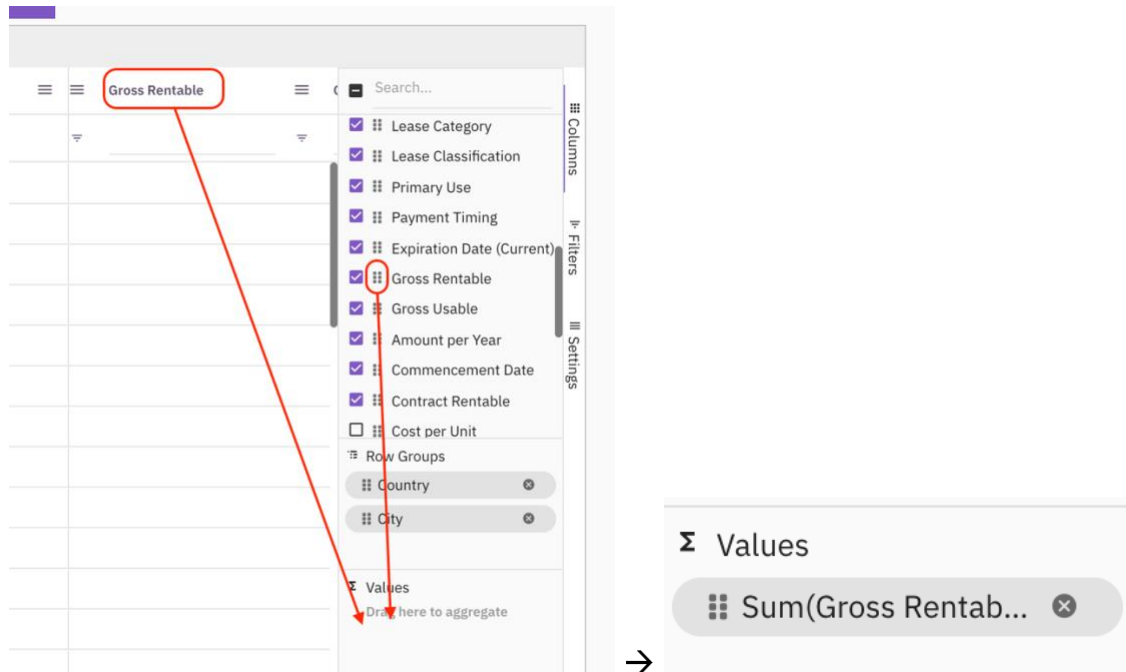


Your column will change according to your selection.

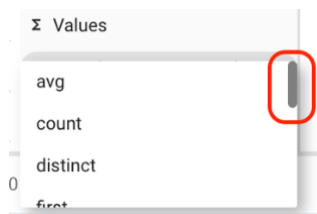
The image shows the same table after the aggregation. The 'Gross U' column has been replaced by 'Sum(Gross Rentable)'. The values in this column are highlighted with a red box. A purple vertical bar is visible on the left side of the table.

Group	Sum(Gross Rentable)
United States (28)	3786806.2
New York (1)	200000
Charlotte (8)	3187030
Philadelphia (1)	102325.4
Washington (1)	102325.4
Los Angeles (1)	102325.4
Oakbrook Terrace (14)	81200
OAKBROOK TERRACE (2)	11600
France (4)	198550
Paris (3)	198010

- j. Option 2: Open up the Columns tab along the side. Click and drag on any of the Column Headers that you would like to aggregate.



- Click anywhere in the bubble to select what type of aggregation you would like to perform on the selected column, scroll for all options (see below for the options).



k. Manage headers for aggregated columns

i. Navigate to the “Settings” Window

ivg(Base Lease Rate)	Payment Timing	Expiration Date (Current)	Gross Rentable	Gross Usable	sur
40		yyyy-mm-dd			
€40	Payment in Arrears	2018.12.31	3,010	2,890	
16					
€16	Payment in Advance	2021.01.31	13,651	12,719	
46					
\$46	Payment in Advance	2016.05.13	2,209	2,209	
-46					
CNY-46	Payment in Advance	2016.05.13	2,209	2,209	

- ii. If you would like to remove the aggregation name in the header of your columns:
- iii. Click the box beside “Show Aggregation Name in Header”

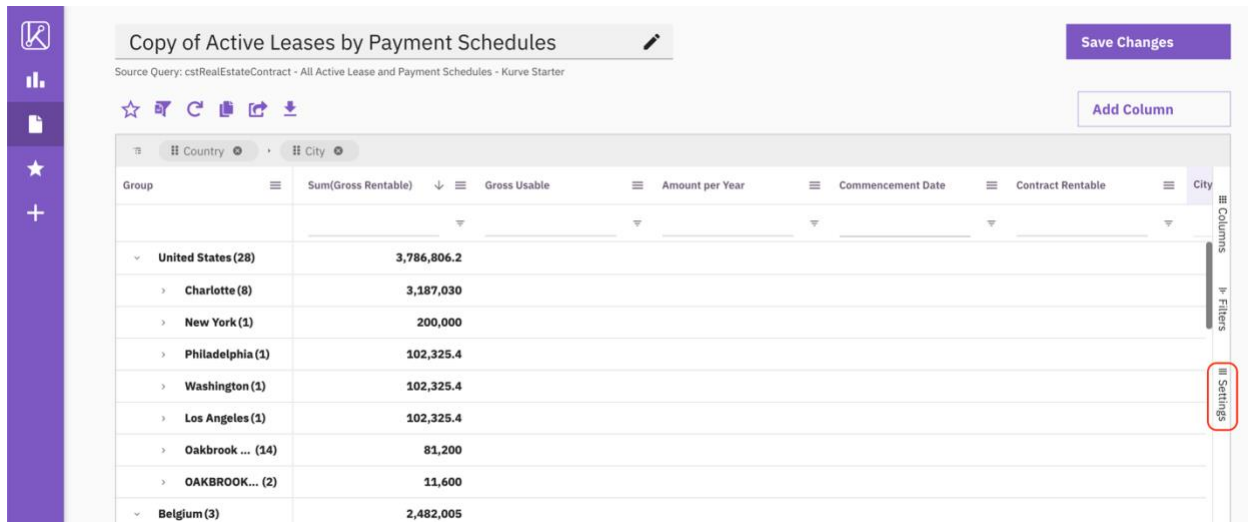
Settings
Rows per Page
100
Levels to Auto-Expand
1
☒ Show Aggregation Name in Header
Clear All Filters

Columns
Filters
Settings

For example, if we’ve aggregated Gross Rentable by Sum, the header will change to Sum(Gross Rentable). You can keep the aggregation, but remove the header for easy reading.

Sum(Gross Rentable)	Gross Rentable
3786806.2	3786806.2
200000	200000
3187030	3187030

- I. Manage levels of grouping to display upon loading your report.
 - i. Click into Settings



Copy of Active Leases by Payment Schedules

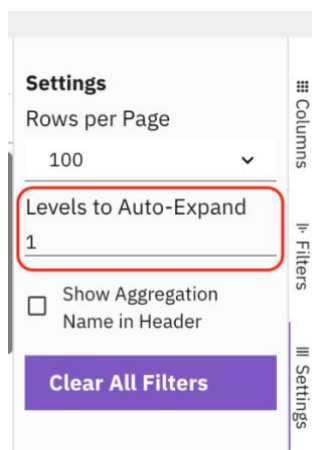
Source Query: cstRealEstateContract - All Active Lease and Payment Schedules - Kurve Starter

Save Changes

Add Column

Group	Sum(Gross Rentable)	Gross Usable	Amount per Year	Commencement Date	Contract Rentable	City
United States (28)	3,786,806.2					
Charlotte (8)	3,187,030					
New York (1)	200,000					
Philadelphia (1)	102,325.4					
Washington (1)	102,325.4					
Los Angeles (1)	102,325.4					
Oakbrook ... (14)	81,200					
OAKBROOK... (2)	11,600					
Belgium (3)	2,482,005					

- ii. Navigate to Levels to Auto-Expand, either use the error to increase/decrease the number or input the number.



Settings

Rows per Page

100

Levels to Auto-Expand

1

☐ Show Aggregation Name in Header

Clear All Filters

For example, if I have 3 levels of grouping in my report and only want to expand the first two groupings, I would set my levels to auto-expand to 2:

Copy of Active Leases by Payment Schedules

Source Query: cstRealEstateContract - All Active Lease and Payment Schedules - Kurve Starter

Level 1: Country, Level 2: State/Province, Level 3: City

Group: United States (28), North Carolina (8), Charlotte (8), New York (1), New York (1), Pennsylvania (1), Philadelphia (1), District of Columbia (1), Washington (1), California (1), Los Angeles (1)

Commencement Date, Contract Rentable, City, State

Settings: Rows per Page (100), Levels to Auto-Expand (2), Show Aggregation Name in Header (checked), Clear All Filters

1 to 18 of 18, Page 1 of 1

m. Value Aggregation Options

avg	Returns the average value for the group
count	Count the number of items in the group
distinct	Counts the number unique values in the group
first	Returns the first value in the group
firstFilled	Returns the first non-empty value in the group
last	Returns the last value in the group
lastFilled	Returns the last non-empty value in the group
max	Returns the maximum value
median	Returns the middle number when sorted from min to max
maxDate	Returns the last date
min	Returns the minimum value
minDate	Returns the earliest date
sum	Returns the sum of values for the group

8. Reorganizing Columns on the Report

a. **Sort List Alphabetically** function: Reorder the report list by clicking on the column headers. The list will reorder by alphabetical order:

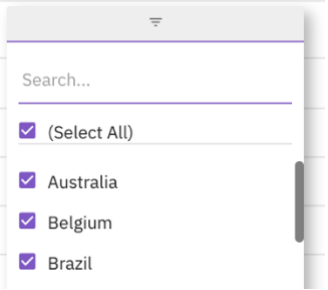
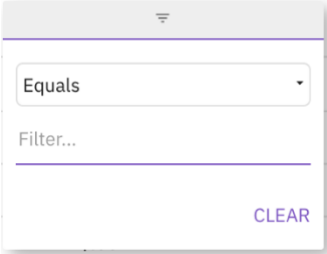
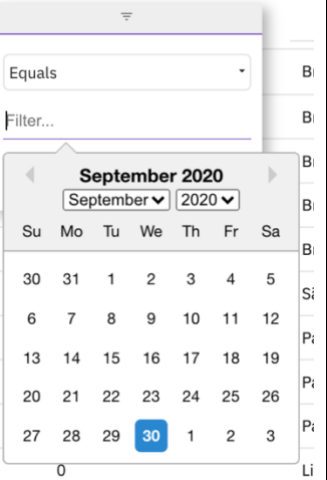
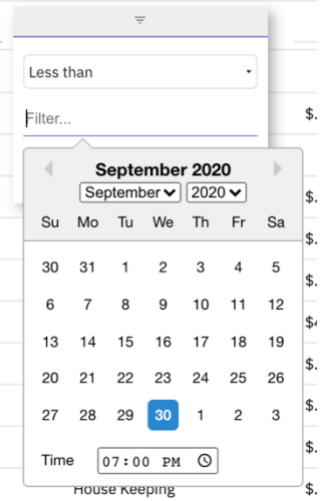
- Arrow facing up (↑) will sort your results in alphabetical order starting from “A.”
- Arrow facing down (↓) will sort your results in reverse alphabetical order starting from “Z.”

Name	Country	City	Contract ID
Brisbane Office Landlord - 333...	Australia	Brisbane	AP-AU-BR-002
Brisbane Gross Lease	Australia	Brisbane	AP-AU-BB-001
Brussels Land Parcel - Red Po...	Belgium	Brussels	EU-BG-BR-003
Retail Landlord - Red Poppy Mall	Belgium	Brussels	EU-BG-BR-005
Airport Landlord - Brussels Ke...	Belgium	Brussels	EU-BG-BR-009
Watson Center - Sao Paulo	Brazil	São Paulo	LA-BR-SP-001
Paris Lease (Finance Lease Tre...	France	Paris	EU-FR-PR-006

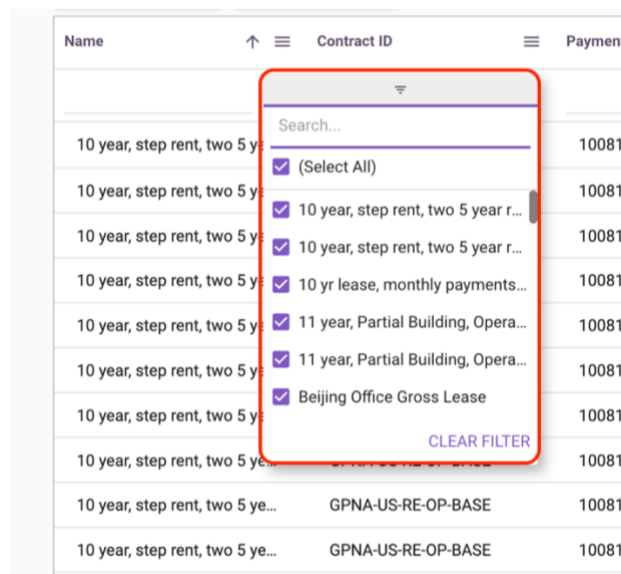
b. **Filter List** function: Click on the filter icon (≡) and a pop up will open to select what you would to filter out. You can also use the Filters tab that is located along the side.

Name	Country	City	Contract ID	Contract Status	Currency	Status
Brisbane Office Landlord - 333...	Australia	Brisbane	AP-AU-BR-002	Active	Australian Dollars	Active
Brisbane Gross Lease	Australia	Brisbane	AP-AU-BB-001	Active	Australian Dollars	Active
Brussels Land Parcel - Red Po...	Belgium	Brussels	EU-BG-BR-003	Active	Euro	Active
Retail Landlord - Red Poppy Mall	Belgium	Brussels	EU-BG-BR-005	Active	Euro	Active
Airport Landlord - Brussels Ke...	Belgium	Brussels	EU-BG-BR-009	Active	Euro	Active
Watson Center - Sao Paulo	Brazil	São Paulo	LA-BR-SP-001	Active	Brazilian real	Active
Paris Lease (Finance Lease Tre...	France	Paris	EU-FR-PR-006	Active	Euro	Active
Paris Office Landlord - Lillie Of...	France	Paris	EU-FR-PA-002	Active	Euro	Active
Paris Plaza Landlord - 17 aven...	France	Paris	EU-FR-PA-005	Active	Euro	Active
Lille Office Building, local repo...	France	Lille	GP-EU-FR-PA-OP-001		Euro	Active

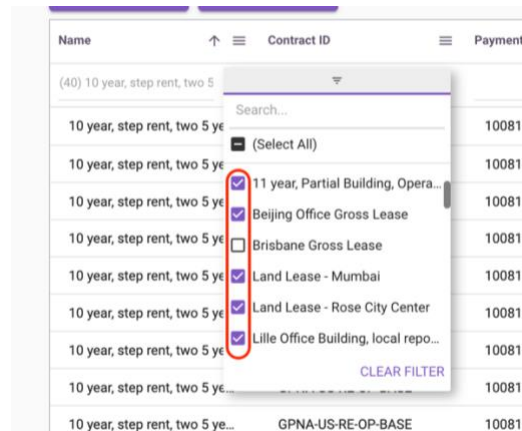
Note: Dependent on the column you filter, there are three different filter options:

Text Filters	Number Filters	Date Filters	Date/Time Filters
			

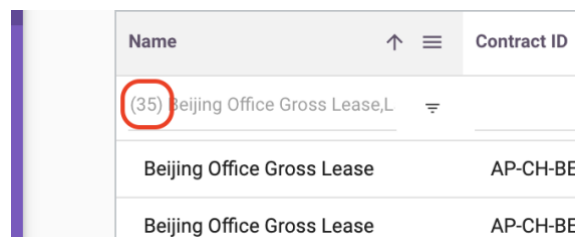
- i. **Text Filters** Function: Select or deselect what you would like to filter. You may also type into the “Search...” box to quickly find specific items to filter.



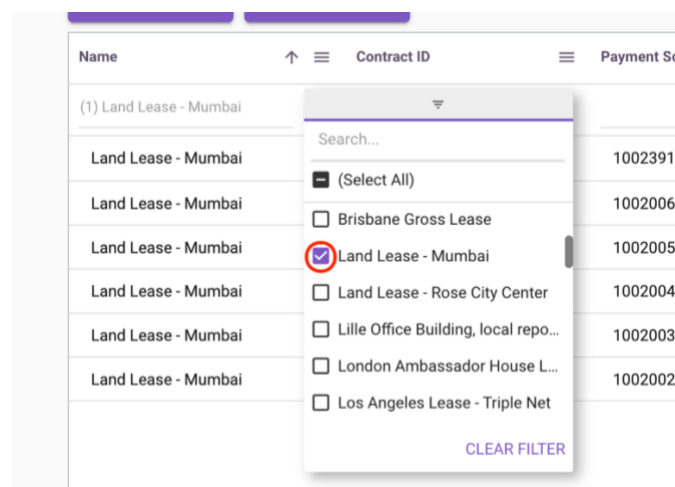
Example: In this case, we want to filter the “Name” column. We deselected “Brisbane Gross Lease” to filter for all other request classes.



- After selecting items to filter, the number of records filtered will show under the column header along with the item names.



- We can also filter for only one or a few options. To do this we deselect “Select All” and then select which options you would like to see. In this example we selected “Land Lease – Mumbai”. You can select as many options as you would like to display.



- c. **Number Filters** Function: Click on the drop-down icon (·) to select the range you would like to filter.

	Gross Rentable	Gross Usable	Co
	2000		C
	30		C
	13650.		C
	2208.504	2208.504	C
	13650.65	12719.35	C

- i. Select the filter option from the drop down list and then fill in the number you would like to set the range under the “Filter...” text box.

Active Leases by Payment Schedules				
Source Query: cstRealEstateContract - All Active Lease and Payment Schedules - Kurve Starter				
Expiration Date (Current)	Gross Rentable	Gross Usable	Commencement	
02/28/2018	2000		03/14/201	
12/31/2018	30		01/01/201	
01/31/2021	13650.		02/01/201	
05/13/2016	2208.50		05/14/201	
01/31/2017	13650.		02/01/201	
01/31/2017	13650.0		02/01/201	
02/28/2018	65000	64500	03/14/201	

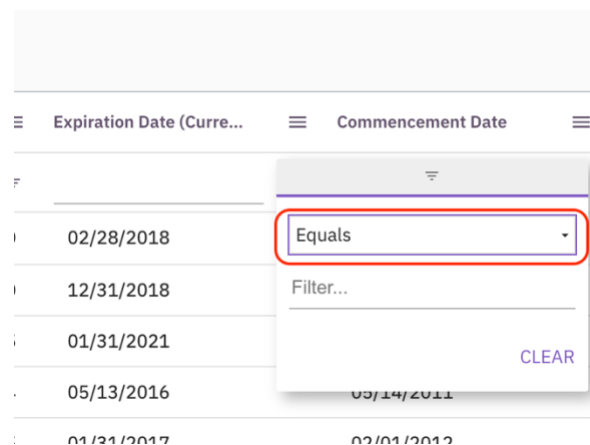
	Gross Rentable	Gross Usable	Comm
	2000		03/
	30		01/
	13650.		02/
	2208.504	2208.504	05/
	13650.65	12719.35	02/
	13650.65	12719.35	02/

- d. To create a range or set a criteria for the filter, fill in the secondary filter.

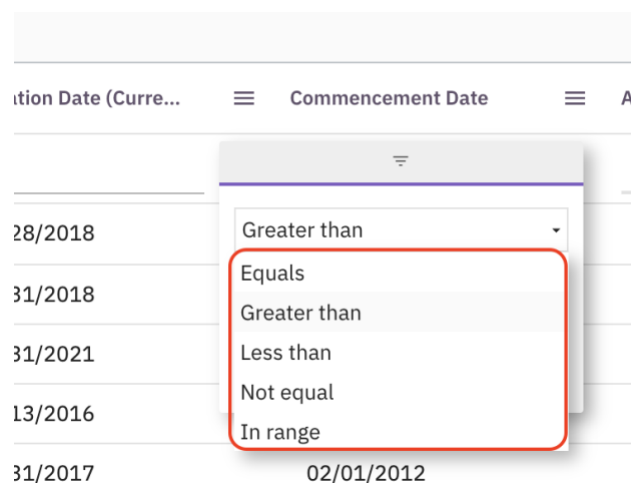
	Gross Rentable	Gross Usable	Comr
	5000		
	2000		03/
	13650.	5000	02/
	13650.		02/
	13650.		02/
	650		03/
	1300		03/
	65000	64500	03/

- e. To easily exit the filter window and keep the filter applied, select the filter bar

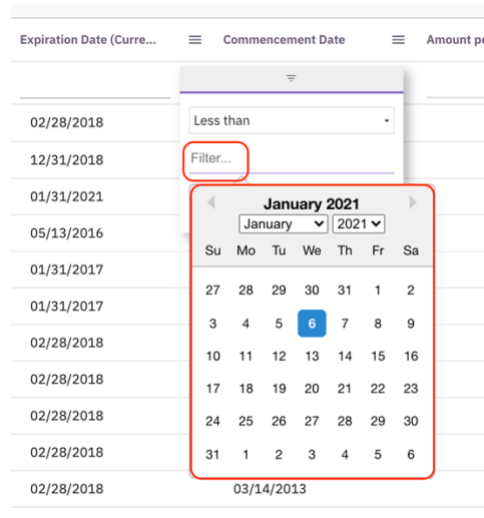
- f. **Date Filters** Function: Click on the drop down icon (▾) to select the date range you would like to filter.



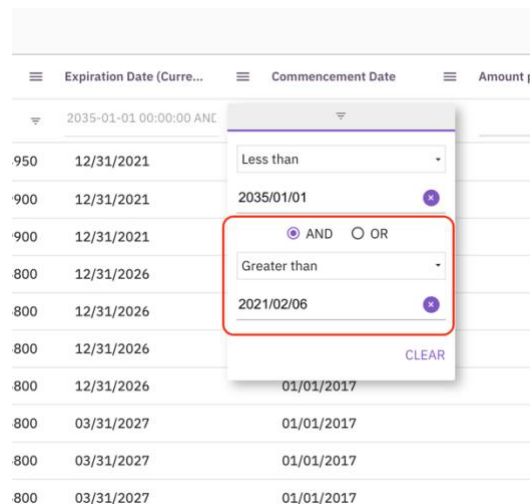
- i. Select the filter option.



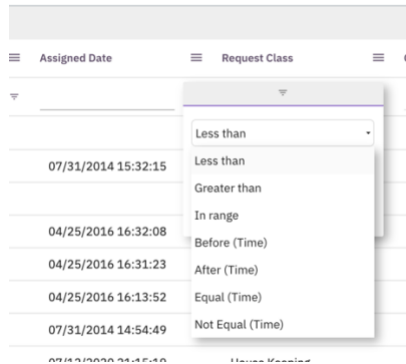
- g. Select the date with the date picker:
i. Click into the Filter... text box and a calendar will pop up.



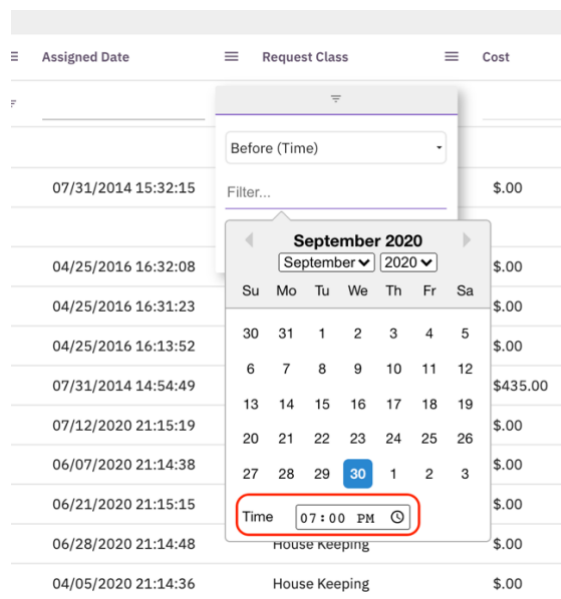
h. To create a date range or set a criterion for the filter, fill in the secondary filter.



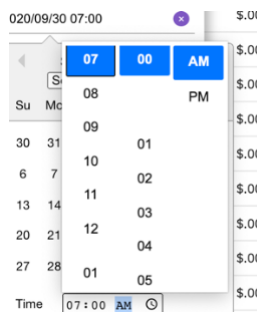
- i. **Date/Time Filters:** With Date Time fields, all the filters for Date fields are available. Additionally, there are also a set of filter options that filter on the time portion of the field.
 - i. Click on the drop down icon (▾) to select the date range you would like to filter.
 - ii. Select the filter option. The Time specific filter types are available at the bottom of the list.



- iii. To filter for a time, click into the Time section at the bottom.



- iv. Select the time you want to filter on – please note, when you choose a filter type with Time in it, it will ignore the date selected.



- j. **Clear Filters:** you can easily clear the filter for one column or all columns:

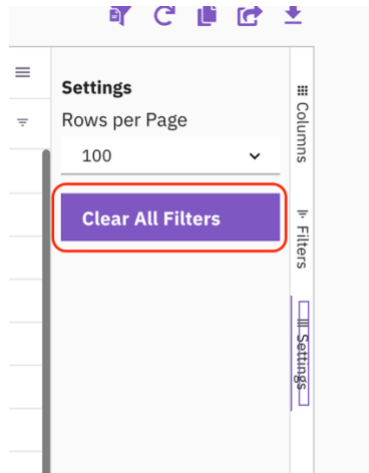
- i. One Column: Navigate to the column you would like to clear the filter for. Select the filter icon and then select Clear.

The screenshot shows a dropdown menu for the 'Gross Usable' column. The menu has a header with a filter icon. Below the header, there are two main sections: 'Greater than' and 'Less than', each with a corresponding input field. The 'Greater than' section is currently active, showing the value '5000'. Below this, there are radio buttons for 'AND' (selected) and 'OR'. The 'Less than' section is also visible with an input field containing '100000'. At the bottom right of the dropdown, there is a red-outlined button labeled 'CLEAR'.

- ii. All Filters: Navigate to the Settings window along the left side of the screen.

ng	Gross Rentable	Gross Usable	Expiration Date (Curre...	Commencement Date	Amount per Year	Contract Rentable
▼	5000	▼	2015-01-01 00:00:00 ANC	▼	▼	▼
Advance	10000	9900	12/31/2021	01/01/2012		\$0.00
Advance	10000	9900	12/31/2021	01/01/2012		\$0.00
Advance	5800	5800	12/31/2026	01/01/2017		\$0.00
Advance	5800	5800	12/31/2026	01/01/2017		\$0.00
Advance	5800	5800	12/31/2026	01/01/2017		\$0.00
Advance	5800	5800	12/31/2026	01/01/2017		\$0.00
Advance	5800	5800	03/31/2027	01/01/2017		\$0.00
Advance	5800	5800	03/31/2027	01/01/2017		\$0.00
Advance	5800	5800	03/31/2027	01/01/2017		\$0.00
Advance	5800	5800	12/31/2026	01/01/2017		\$0.00
Advance	5800	5800	12/31/2026	01/01/2017		\$0.00
Advance	5800	5800	12/31/2026	01/01/2017		\$0.00

- iii. Click **Clear All Filters** to remove all filters currently applied in the report.



- k. **Reorder Columns** function: In personalizing a report, you can click any column header to drag and drop it to the right or left to reorder what columns you would like to be seen beside each other.

Copy of Active Leases by Payment Schedules

Source Query: cstRealEstateContract - All Active Lease and Payment Schedules - Kurve Starter

Name	Country	City	Contract ID	Contra
Airport Landlord - Charlotte Bald Eagle Airport A...	United States	Charlotte	NA-UA-NC-009	Activ
Airport Landlord - Brussels Kestrel Airport Autho...	Belgium	Brussels	EU-BG-BR-009	Activ
Airport Landlord - Moscow Tundra Swan Airport ...	Russia	Moscow	CE-CR-PR-009	Activ
Retail Landlord - Carnatio Mall	Mexico	Ciudad de Mexico	LA-MX-MC-008	Activ
Retail Landlord - Rose Mall	United States	Charlotte	NA-US-NC-008	Activ
Apartment Landlord - Lotus Apartments	United Arab Emirates	Dubai	EM-UA-DB-009	Activ
Apartment Landlord - Carnatio Apartments	Mexico	Ciudad de Mexico	LA-MX-MC-009	Activ

Copy of Active Leases by Payment Schedules

Source Query: cstRealEstateContract - All Active Lease and Payment Schedules - Kurve Starter

Country	City	Name	Contract ID
United States	Charlotte	Airport Landlord - Charlotte Bald Eagle Airport A...	NA-UA-NC-009
Belgium	Brussels	Airport Landlord - Brussels Kestrel Airport Autho...	EU-BG-BR-009
Russia	Moscow	Airport Landlord - Moscow Tundra Swan Airport ...	CE-CR-PR-009
Mexico	Ciudad de Mexico	Retail Landlord - Carnatio Mall	LA-MX-MC-008

l. **Pin Columns** function: There are two ways to pin a column.

- i. **Option 1:** Click on the menu icon (≡) located next to the column you would like to pin. Click on the Pin Column icon. Choose if you would like to pin the column to the left or the right.

Name	Contract ID
New York Office Landlord - 13...	US-NY-NY-00
Paris Lease (Finance Lease Tre...	EU-FR-PR-00
Watson Centre - Frankfurt	EU-DE-FR-00
Tel Aviv Gross Lease	ME-IS-TA-00

Name	Contract Status
New York Office Landlord - 1...	Active
Paris Lease (Finance Lease T...	Active
Watson Centre - Frankfurt	Active
Tel Aviv Gross Lease	Active
Watson Center - Sao Paulo	Active
Watson Center - Hong Kong - L...	Active
Cape Town Office Landlord - 1...	Active

- m. **Option 2:** Click on the column header you wish to pin and drag the column all the way left side of all columns until the pin icon appears on the left side of the column. The pin icon will only appear when you click and drag the column header. Once you drop the column header the pin icon will disappear

Country	City	Name	Contract ID
United States	New York	New York Office Landlord - 13...	US-NY-NY-002
France	Paris	Paris Lease (Finance Lease Tre...	EU-FR-PR-006
Germany	Frankfurt am Main	Watson Centre - Frankfurt	EU-DE-FR-001
Israel	Tel Aviv	Tel Aviv Gross Lease	ME-IS-TA-007
Brazil	São Paulo	Watson Center - Sao Paulo	LA-BR-SP-001

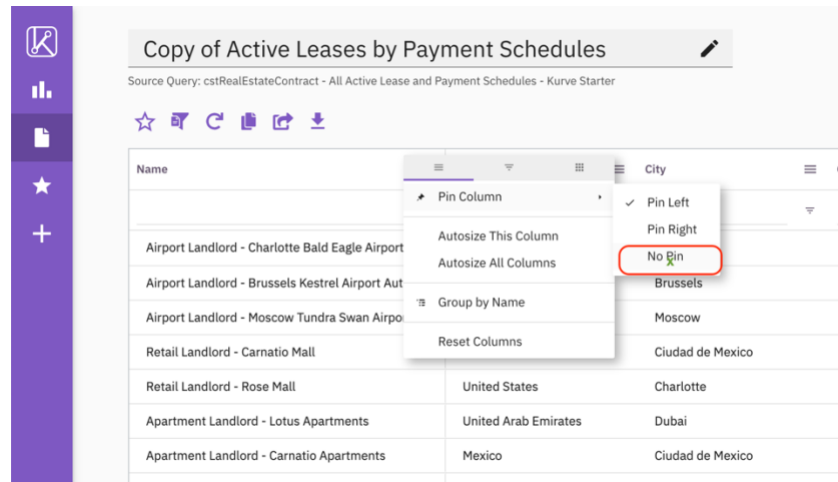


Name	Country
New York Office Landlord - 13...	United S...
Paris Lease (Finance Lease Tre...	France

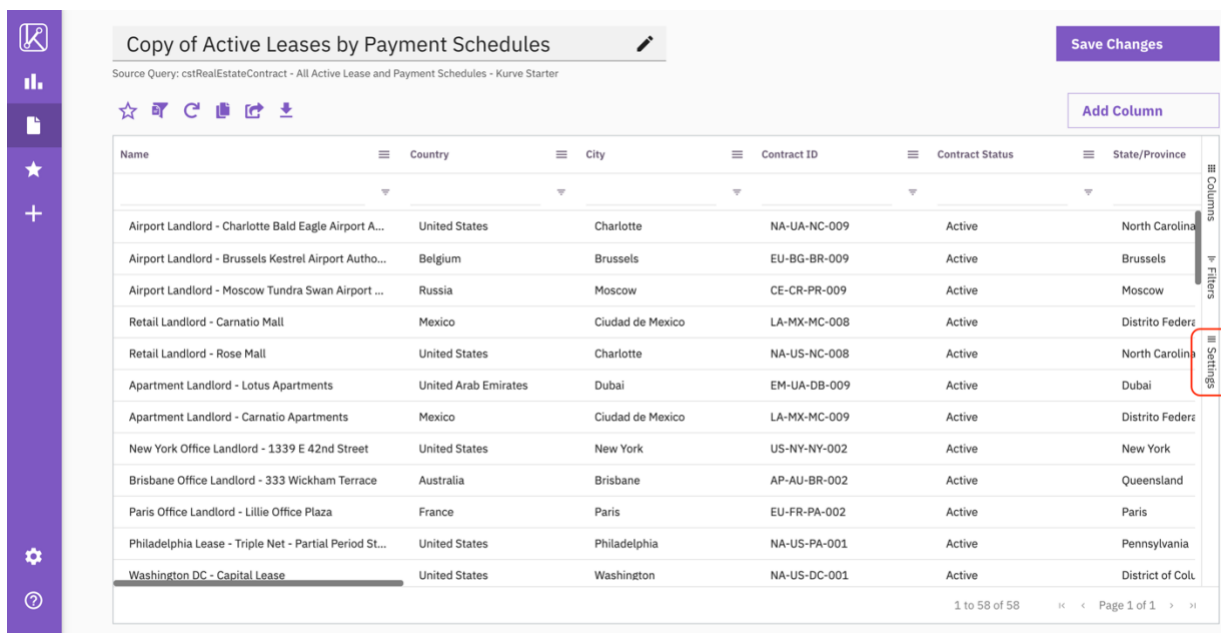


Copy of Active Leases by Payment S	
Source Query: cstRealEstateContract - All Active Lease and Payment Sched	
Name	Country
Airport Landlord - Charlotte Bald Eagle Airport A...	United S
Airport Landlord - Brussels Kestrel Airport Autho...	Belgium
Airport Landlord - Moscow Tundra Swan Airport ...	Russia

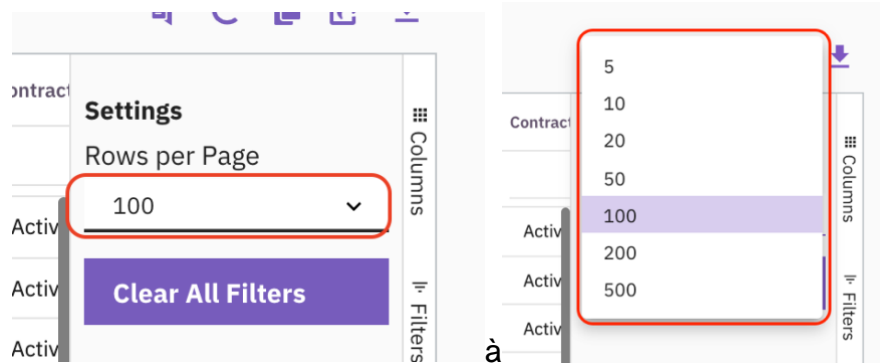
- n. **Removing a pin.** To remove the pin click on the menu icon (≡), click on the Pin Column icon and select No Pin.



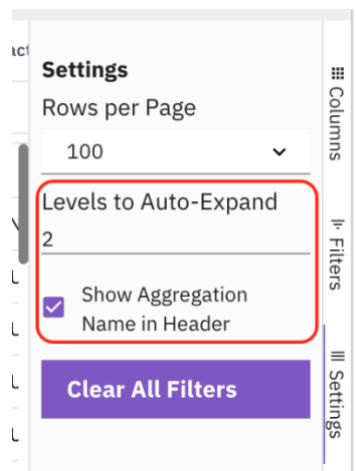
- o. Manage the number of **Rows per Page**. You can easily control how many rows displayed in one page of the report. Navigate to the Settings window along the left side of the report.



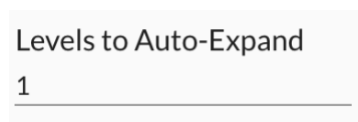
- Click into the drop-down and select the number of rows you want to display. Your report will update automatically once you have selected.



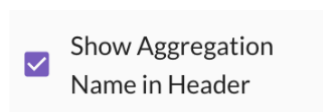
- p. Formatting Grouping and Aggregations: Upon grouping and aggregating your report, two more setting configurations will appear



- i. Manage number of levels to show in report: Increase or decrease the number of grouping levels to load



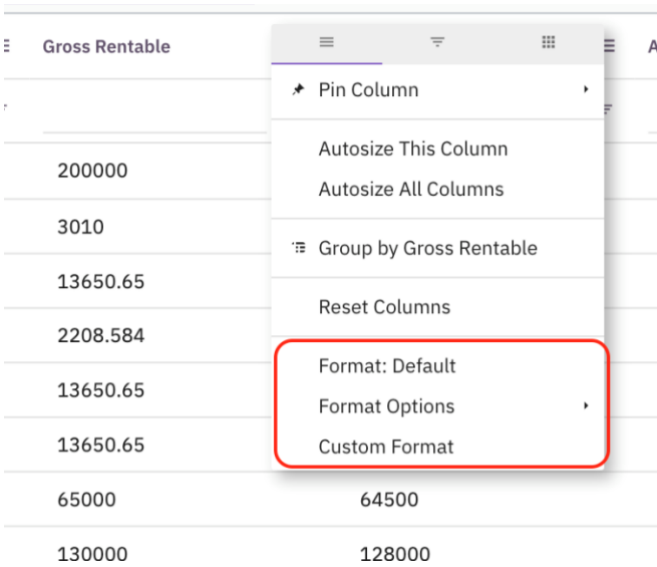
- ii. Remove aggregation title in the name: Click the checkbox beside “Show Aggregation Name in Header”



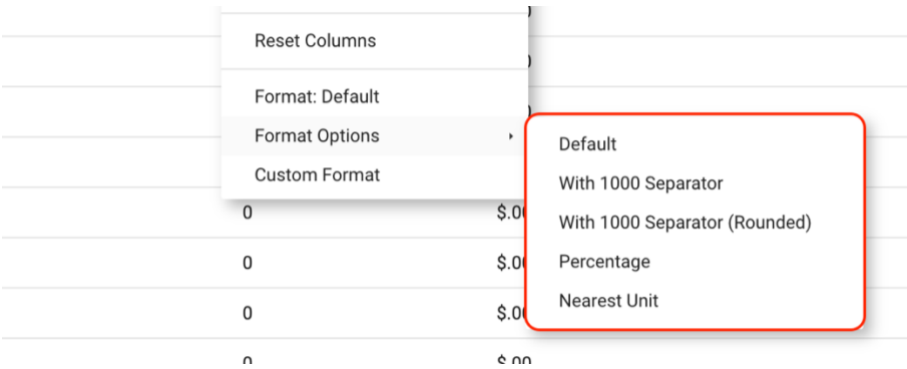
9. Formatting Number Columns

There are multiple types of formats you can use for number columns. These formats can be used on existing number columns or custom columns.

- a. To change the format of the column, navigate to the column and click the menu icon (≡). The formatting options appear at the bottom of the list.



- b. You can either use a pre-set format or create a custom format.
- c. **Pre-set Format Options:** Hover over “Format Options” to view the format options. Click a format to change the column.



Format	Input	Output
Default	10000.56	10000.56
With 1000 Separator	10000.56	10,000.56

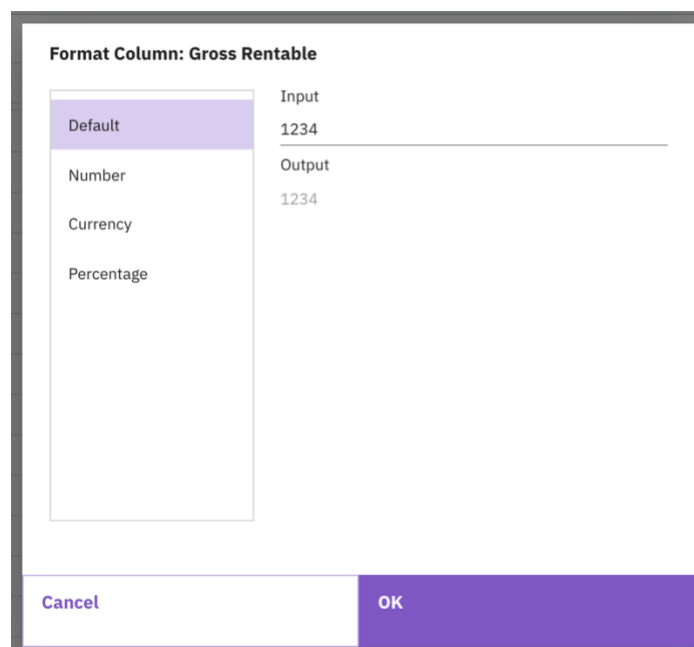
With 1000 Separator (Rounded)	10000.56	10,001
Percentage	1	100%
Nearest Unit	10000.56	10k

d. Custom Format:

i. Select “Custom Format”



- ii. A pop-up will appear showing what the current format is. At any time you can click Cancel to get out of the custom format window, or OK to save your format selection.



- iii. The first step is to decide whether you want to reformat the column as a Number, Currency, or Percentage. Select either Number, Currency or Percentage along the left-hand side. The formats outlined below work the same for each of them.

Format Column: Gross Rentable

Default	Input	1234
Number	Output	1234.00
Currency	Decimal Places	2
Percentage	<input type="checkbox"/> Trim Decimals	
	<input type="checkbox"/> Use Separators	
	<input type="checkbox"/> Negatives in Brackets	
	<input type="checkbox"/> Show in Nearest Unit	

Cancel OK

5 \$ 00 05/13/2013

- **Input:** Sample Number
- **Output:** Formatted Number

Input
1234

Output
1,234

- **Decimal Places:** Specify how many decimal places you would like shown on each of the rows. To do this you can either type the number of decimals you want shown or use the arrows at the end of the row

Number

Input: 1234

Output: 1234.00

Decimal Places: 2

☐ Trim Decimals

- **Trim Decimals:** removes unnecessary decimals, i.e. removes trailing 0s.
To add it into your format, click the check box beside.

The screenshot shows the 'Number' format configuration in the Kurve Admin settings. On the left, a sidebar lists 'Default', 'Number' (selected), 'Currency', and 'Percentage'. On the right, the configuration fields are: 'Input' (1234), 'Output' (1234), 'Decimal Places' (2), 'Trim Decimals' (checked, highlighted with a red circle), and 'Use Separators' (unchecked).

Next, specify the number of decimals you want to trim down to in the “Decimal Places” section above. By selecting 2 decimals, the maximum number of decimal places that will remain is 2. If any of the numbers have less than 2 decimals, they will remain the same.

For example:
Input: 10,000.22000
Output: 10,000.22

Input: 10,000.2
Output: 10,000.2

- **Use Separators:** add commas to segment numbers
Select the box beside this if you would like to segment large numbers with commas.

For example:
Input: 100000
Output: 100,000

This screenshot shows the 'Number' format configuration with 'Use Separators' checked. The sidebar on the left is the same. The configuration fields on the right are: 'Input' (1234), 'Output' (1,234.00), 'Decimal Places' (2), 'Trim Decimals' (unchecked), 'Use Separators' (checked, highlighted with a red circle), and 'Negatives in Brackets' (unchecked).

- **Negative in brackets:** Adds brackets to any negative number. Select the check box beside this option to apply it.

For example:

Input: -10,000

Output: (10,000)

The screenshot shows the 'Number' tab selected in the left sidebar. The main panel displays the following settings:

- Input: 1234.00
- Decimal Places: 2
- ☐ Trim Decimals
- ☐ Use Separators
- ☒ Negatives in Brackets (highlighted with a red circle)
- ☐ Show in Nearest Unit

- **Show in Nearest Unit:** trims the number to its nearest unit. Select the checkbox beside this option to apply it in the format.

For example:

Input: 1230

Output: 1.23k

The screenshot shows the 'Number' tab selected in the left sidebar. The main panel displays the following settings:

- Input: 1234
- Output: 1.23k
- Decimal Places: 2
- ☐ Trim Decimals
- ☐ Use Separators
- ☐ Negatives in Brackets
- ☒ Show in Nearest Unit (highlighted with a red circle)

- e. You can combine any of the formatting options together to get your desired output. For example, my selections below:

Format Column: Contract Rentable

Default	Input 1234
Number	Output 1,234
Currency	Decimal Places 2
Percentage	<input checked="" type="checkbox"/> Trim Decimals
	<input checked="" type="checkbox"/> Use Separators
	<input type="checkbox"/> Negatives in Brackets
	<input type="checkbox"/> Show in Nearest Unit

- f. Once you're happy with your format selection, click OK.

The screenshot shows a dialog box titled "Format Column: Gross Rentable". It has a sidebar on the left with options: Default, Number (selected), Currency, and Percentage. The main area on the right shows the "Input" as 1234 and the "Output" as 1,234. Below this, "Decimal Places" is set to 2. There are four checkboxes: "Trim Decimals" (checked), "Use Separators" (checked), "Negatives in Brackets" (unchecked), and "Show in Nearest Unit" (unchecked). At the bottom, there are "Cancel" and "OK" buttons. The "OK" button is highlighted with a red rectangle. The background shows a table with columns for "5", "\$.00", and "05/13/2013".

- g. Your column will format accordingly (see below).

Gross Rentable		Gross Rentable	
200000		200,000	
3010		3,010	
13650.65		13,650.65	
2208.584		2,208.58	
13650.65		13,650.65	
13650.65		13,650.65	
65000		65,000	
	→	130,000	

- i. Custom Currency Format: You can re-format your numbers to a specific currency (please note, this function does not auto calculate the currency conversion). If you want to convert the currency you should use a custom column.
- Select Currency

Format Column: Amount per Year

Default
Number
Currency
Percentage

Input
1234

Output
\$1,234.00

Currency
USD US Dollar

Decimal Places
2

☐ Negatives in Brackets

Cancel OK

5 \$0.00 05/13/2013

- h. Using the drop down, either scroll to select the currency or type the currency/country you are looking for

Format Column: Amount per Year

Default
Number
Currency
Percentage

Input
1234

Output
\$1,234.00

Currency
swis
CHF Swiss Franc

☐ Negatives in Brackets

- i. Select the currency to re-format the number to

Currency
swis
CHF Swiss Franc

☐ Negatives in Brackets

- o The Output will update

Format Column: Amount per Year

Default
Number
Currency
Percentage

Input
1234

Output
CHF 1,234.00

Currency
CHF Swiss Franc

Decimal Places
2

☐ Negatives in Brackets

Cancel OK

- o Click OK to apply to re-formatted number

Format Column: Amount per Year

Default	Input 1234
Number	Output CHF 1,234.00
Currency	Currency CHF Swiss Franc
Percentage	Decimal Places 2

☐ Negatives in Brackets

Cancel OK

j. Formatting for TRIRIGA Currency Fields

- i. If you would like to keep the currency symbol specified in TRIRIGA, reformat your column with the “Number” option. You can use default or custom formatting
- ii.
- iii. For example, for the Base Lease Rate column (below), we have currency symbols dollars and euros. If we want to keep those currency symbols but remove the decimals:

The sequence of screenshots illustrates the formatting process for the 'Base Lease Rate' column. The first screenshot shows the column with values like \$10,000.00 and €26.00. The second screenshot shows the context menu open with 'Format: With 1000 Separator (Rounded)' selected. The third screenshot shows the column with values formatted to \$10,000 and €26.

k. OR: you can custom format as you wish using the Number window

Format Column: Base Lease Rate

Default	Input 1234
Number	Output 1234
Currency	Decimal Places 0
Percentage	<input type="checkbox"/> Trim Decimals
	<input type="checkbox"/> Use Separators
	<input type="checkbox"/> Negatives in Brackets
	<input type="checkbox"/> Show in Nearest Unit

OK **Cancel**

CREATE A GRAPH


1. *Selecting a Graph Source*


- a. From the Kurve Dashboard, click on the Create Icon (+) to create a new record;
- b. Select 'Graph' as your record type (options being Graph or Report);

Cancel

Please select a record type

☒ Select Record Type ☐ Select Data Source ☐ Create Query Filters ☐ Name Graph/Report


Graph


Report

2. *Creating a Graph from a Query or Report*

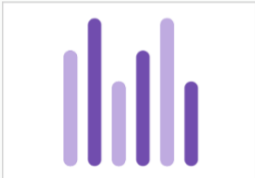
Select the source of your graph data. There are two options to select from:

- a. Query (Section 2.a.)
- b. An Existing Report (Section 2.b.)

[Cancel](#)

Choose a graph source

☒ Select Record Type
 ☐ Select Data Source
 ☐ Create Query Filters



Graph

Create from Report

Create from Query

2.A. Creating a Graph from a Query

- Click “Create from Query,” and a new page will open. The list will show 10 of Kurve’s pre-set starter queries to choose from.

[Cancel](#) [Back a step](#)


Select a source query

☐ Select Record Type
 ☒ Select Data Source
 ☐ Create Query Filters
 ☐ Name Graph/Report

Rows per page: 10 1-10 of 10

QUERY TITLE	QUERY NAME	MODULE	BO	TAGS	TYPE
Contains	Contains	Contains	Contains	Contains	
All Active Leases	cstRealEstateContract - All Active Lease Data - Kurve Starter	triContract	triRealEstateContract	Kurve Starter Queries	Query
All Active Leases and Payment Schedules	cstRealEstateContract - All Active Lease and Payment Schedules - Kurve Starter	triContract	triRealEstateContract	Kurve Starter Queries	Query
All Buildings with Space and Floor Capacity	cstBuilding - All Buildings with Space and Floor Capacity - Kurve Starter	Location	triBuilding	Kurve Starter Queries	Query
All Capital Projects	cstCapitalProject - All Capital Projects - Kurve Starter	triProject	triCapitalProject	Kurve Starter Queries	Query
All Capital Projects and Locations	cstCapitalProject - All Capital Projects and Locations - Kurve Starter	triProject	triCapitalProject	Kurve Starter Queries	Query
All Capital Projects with Contact Roles	cstCapitalProject - All Capital Projects Data with Contact Roles - Kurve Starter	triProject	triCapitalProject	Kurve Starter Queries	Query
All Corrective Work Tasks with Request Class	cstWorkTask - All Corrective Work Tasks with Request Class - Kurve Starter	triTask	triWorkTask	Kurve Starter Queries	Query
All Preventive Work Tasks with Request Class	cstWorkTask - All Preventive Work Tasks with Request Class - Kurve Starter	triTask	triWorkTask	Kurve Starter Queries	Query
All Space Classes	cstSpaceClassCurrent - All Space Classes - Kurve Starter	Classification	triSpaceClassCurrent	Kurve Starter Queries	Query

- Select the query you would like to use as your graph’s data source:
 - Columns are organized in a table by *Query Title*, *Query Name*, *Module*, *BO* and *Tags*.

Back a step	(Top right of screen) Click to back to the previous page to choose a graph source
Cancel	(Top left of screen) Click to cancel making a graph and go back to the Kurve Dashboard
Stepper	 <p>The Stepper is also clickable if you need to go back a step once you've completed it</p>

- c. If you want to use another query in the system, you can search using one or more of the options *Title*, *Name*, *Module*, *BO*, or *Tag*:

- d.
- e. Click into the search field and type the word or phrase. Click the enter on your keyboard to initiate the search. In the below example, we are searching “Active” under the Query Name and “triContract” as the Module.

- f. Scroll through the list (scroll bar on the righthand side of the table) and click on the query you would like to use to make a graph;


QUERY TITLE	QUERY NAME	MODULE	BO	TAGS	TYPE
Contains	Active	triContract	Contains	Contains	
Active Transaction Plans	triRealEstateContract - BIRT- Active Transaction Plans	triContract		Real Estate	External
All Active Lease Data and Fiscal Line Item	cstRealEstateContract - All Active Lease Data and Fiscal Line Item - Kurve Module	triContract	triRealEstateContract	Kurve Module Queries	Query
All Active Leases	cstRealEstateContract - All Active Lease Data - Kurve Starter	triContract	triRealEstateContract	Kurve Starter Queries	Query
All Active Leases	cstRealEstateContract - All Active Lease Data - Reporting Starter	triContract	triRealEstateContract	Reporting Starter Queries	Query
All Active Leases and Payment Schedules	cstRealEstateContract - All Active Lease and Payment Schedules - Reporting Starter	triContract	triRealEstateContract	Reporting Starter Queries	Query

2.B. Creating a Graph from a Kurve Report

a. Select Create from Report

Choose a graph source

☒ Select Record Type
 ☐ Select Data Source
 ☐ Create Query Filters



Graph

Create from Report

Create from Query

b. Search for the Report you would like to use as your graph's data source. Columns are organized in a table by *Report Name*, *Query Title* and *Creator*.

Cancel

Back a step

Select a source report

Select Record Type

Select Data Source

Create Query Filters


Name Graph/Report

Search for Reports

Rows per page: 101-10 of 135

REPORT NAME	QUERY NAME	CREATOR	CREATED DATE
Capital Projects - Vendor Comparison	cstCapitalProject - All Capital Projects - Kurve Starter	Lauren Rochon	09/28/2020
PO by Vendor - Per Project - Line Items	cstPurchaseOrder - Kurve - PO by Vendor - Per Project - Line Items	Lauren Rochon	09/28/2020
PO by Vendor - Per Project	cstPurchaseOrder - Kurve - PO by Vendor - Per Project - Line Items	Kurve Test 01	09/25/2020

c. Click on any of the headers to sort them. Click once for ascending, twice for descending, and a third time to clear the sort.

REPORT NAME 	QUERY NAME	CREATOR	CREATED DATE
10. Myself as owner, grouped & Aggregated	cstRealEstateContract - All Active Lease Data - Kurve Starter	Lauren Rochon	07/24/2020
3. Create Report (AW 1.11)	Copy Of cstRealEstateContract - All Active Lease and Payment Schedules - Kurve Starter	Ashley Walter	09/14/2020
4. Shared with security group and individual	cstBuilding - All Buildings with Space and Floor Capacity	Lauren Rochon	07/06/2020
8. Kurve Test Owner, shared with 12 individuals	cstCapitalProject - All Capital Projects - Kurve Starter	Kurve Test 01	06/26/2020

d. Select the Kurve Report you would like to use as your data source.

<input type="radio"/> Select Record Type	<input checked="" type="radio"/> Select Data Source	<input type="radio"/> Create Query Filters	<input type="radio"/> Name Graph/Report
------------------------------------------	-----------------------------------------------------	--------------------------------------------	-----------------------------------------

Search for Reports

Rows per page: 10 1-10 of 135

REPORT NAME	QUERY NAME	CREATOR	CREATED DATE
Capital Projects - Vendor Comparison	cstCapitalProject - All Capital Projects - Kurve Starter	Lauren Rochon	09/28/2020
PO by Vendor - Per Project - Line Items	cstPurchaseOrder - Kurve - PO by Vendor - Per Project - Line Items	Lauren Rochon	09/28/2020
PO by Vendor - Per Project	cstPurchaseOrder - Kurve - PO by Vendor - Per Project - Line Items	Kurve Test 01	09/25/2020
David's Test Report	cstPurchaseOrder - Kurve - PO by Vendor - Per Project - Line Items	David Yew	09/24/2020

3. Create Query Filters

With Kurve Query Filters you can create and apply filters before loading your graph. This will help to improve load times and see only the data that is relevant to you. Query Filters can be added to any column from the Primary Business Object.

Cancel
Back a step
Skip

Create query filters

☒ Select Record Type
☒ Select Data Source
☒ Create Query Filters
☐ Name Graph/Report

Only columns from the Primary Business Object can be selected for Query Filters. Some columns on the query may not be available.
Filter Created: 0/12

 CREATE FILTER	FILTER 2	FILTER 3	FILTER 4	FILTER 5	FILTER 6
FILTER 7	FILTER 8	FILTER 9	FILTER 10	FILTER 11	FILTER 12

a. Create a new filter by clicking on the first open box “Create Filter”

Cancel

Create query filters

☒ Select Record Type ☒ Select Data Source

Only columns from the Primary Business Object can be selected for Que
Filter Created: 0/12

CREATE FILTER

FILTER 2

b. Next, select the column from the query that you would like to have a filter

Filter Created: 1/12

Column:

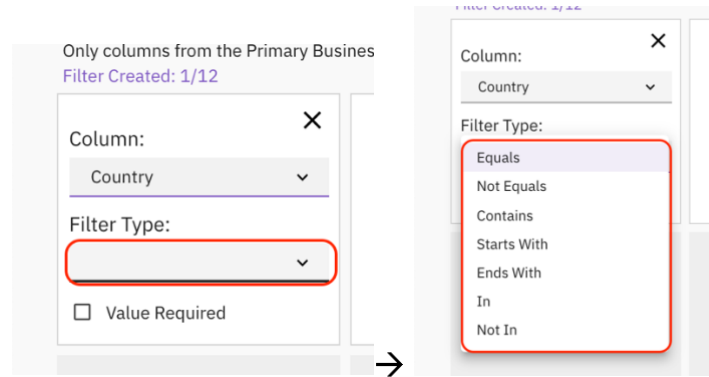
Filter Type:

☐ Value Required

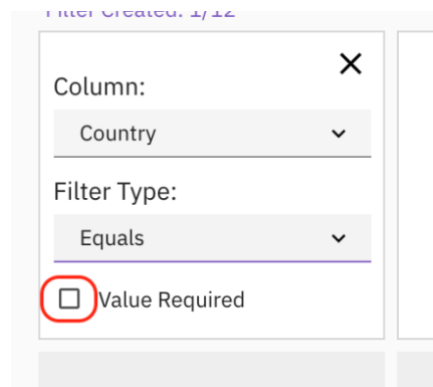
Column:

- Contract ID
- Currency
- Name
- Contract Status
- Contract Type
- Active End Date
- Active Start Date
- City
- State/Province
- Country

c. Now, select the filter type:



- d. Select whether the filter will be required or not upon loading the graph by selecting the check box next to “Value Required”. By making the filter required, the user will not be able to load the graph unless they provide a value.



- e. You can continue making more filters using the same process. Once done creating them, click Continue.

Cancel Back a step **Continue**

Create query filters

Select Record Type Select Data Source **Create Query Filters** Name Graph/Report

Only columns from the Primary Business Object can be selected for Query Filters. Some columns on the query may not be available.
Filter Created: 3/12

Column: Country	Column: Gross Rentable	Column: Primary Use	<div>+ CREATE FILTER</div>	FILTER 5	FILTER 6
Filter Type: Equals	Filter Type: More Than	Filter Type: Contains			
<input type="checkbox"/> Value Required	<input type="checkbox"/> Value Required	<input type="checkbox"/> Value Required			
FILTER 7	FILTER 8	FILTER 9	FILTER 10	FILTER 11	FILTER 12

4. Naming the Graph and selecting the Graph Type

- a. The next step will let you name your graph and select the graph type you'd like to portray your data.

Cancel Back a step Create Graph

Name and select a graph type


☒ Select Record Type ☒ Select Data Source ☒ Create Query Filters ☒ Name Graph/Report


Review your selections and create your graph


Record Type: Graph
Data Source: Active Leases by Payment Schedules
Query Filters: [Column: Country, Filter Type: Equals] [Column: Gross Rentable, Filter Type: More Than] [Column: Primary Use, Filter Type: Contains]


Graph Name


Select Graph Type:



Column



Stacked Column



Bar


Stacked Bar


Line


Pie


Scatter


Area


- b. Input your graph name


Query Filters: [Column: Country, Filter Type: Equals] [Column: Gross Rentable, Filter Type: More Than] [Column: Primary Use, Filter Type: Contains]


Graph Name


- c. Select your Graph Type. Your selected graph type will be highlighted in purple.


Select Graph Type:



Column



Stacked Column



Bar


Stacked Bar


Line


Pie


Scatter


Area

d. Select “Create Graph” to make your graph selections.

Cancel
Back a step
Create Graph

Name and select a graph type

Select Record Type
Select Data Source
Create Query Filters
Name Graph/Report

Review your selections and create your graph

Record Type: Graph
Data Source: Active Leases by Payment Schedules
Query Filters: [Column: Country, Filter Type: Equals] [Column: Gross Rentable, Filter Type: More Than] [Column: Primary Use, Filter Type: Contains]

Graph Name
All Active Leases

Select Graph Type:

Column

Stacked Column

Bar

Stacked Bar





Line





Pie

Scatter

Area

The types of graphs are described below:

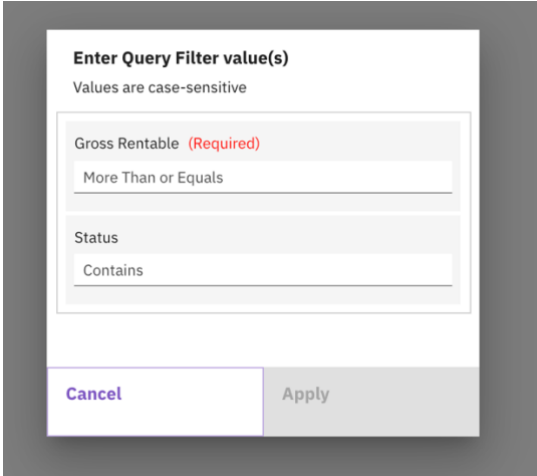
	Column	Used to compare different groups and their quantitative values (e.g Total Cost of Rent by Building). Each column can be colored by a different dimension. You could also use count of records as your quantitative value or measure.
	Stacked Column	Used to compare different groups and their quantitative values (e.g Total Cost of Rent by Building). Each column can be split by a selected “Color By” property. You could also use count of records as your quantitative value or measure.
	Bar	Same as Column Graph, except the columns are horizontal.
	Stacked Bar	Same as Stacked Column Graph, except the columns are horizontal.

	Line	Used to show trends of values over a numerical dimension, such as Cost over Time, Cost per Sq-Ft over Total Square Footage etc.
	Pie	Used when you are trying to compare parts of a whole. They do not show changes over time.
	Scatter	Used to show correlations between two properties. In scatter graphs, look for trends and clusters of occurrences.
	Area	Used to show trends of values over a numerical dimension, such as Cost over Time, Cost per Sq-Ft over Total Square Footage etc. Area graphs are good to use when comparing the changes in two or more related groups that make up one whole category.

5. Filling in Query Filters

a. Required Filters:

- i. Before creating the graph, if you have selected Required on any of your query filters on the graph, you will need to input values. The Apply button will be greyed out until providing a value for the required field.



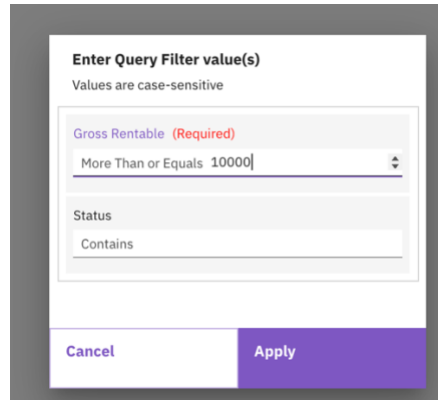
Enter Query Filter value(s)
Values are case-sensitive

Gross Rentable (Required)
More Than or Equals

Status
Contains

Cancel Apply

- ii. Input a value in the white box next to the filter type. Below we have inputted 10,000. You will notice the apply button turns purple upon providing a value. (Please note, text values are case sensitive)



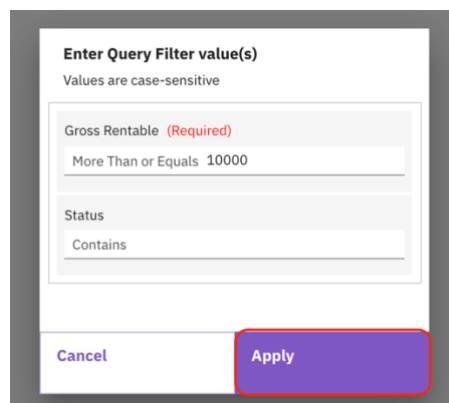
Enter Query Filter value(s)
Values are case-sensitive

Gross Rentable (Required)
More Than or Equals 10000

Status
Contains

Cancel Apply

- iii. Click Apply.



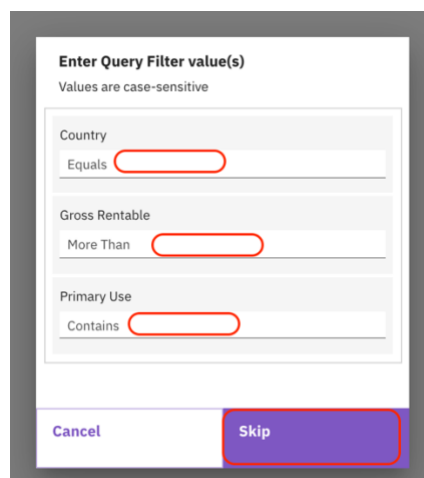
Enter Query Filter value(s)
Values are case-sensitive

Gross Rentable (Required)
More Than or Equals 10000

Status
Contains

Cancel Apply

- iv. Non-required filters: you are not required to input a value for filters that aren't specified as required. Either enter a value and click Apply, or simply click Skip to load all query results.



Enter Query Filter value(s)
Values are case-sensitive

Country
Equals

Gross Rentable
More Than

Primary Use
Contains

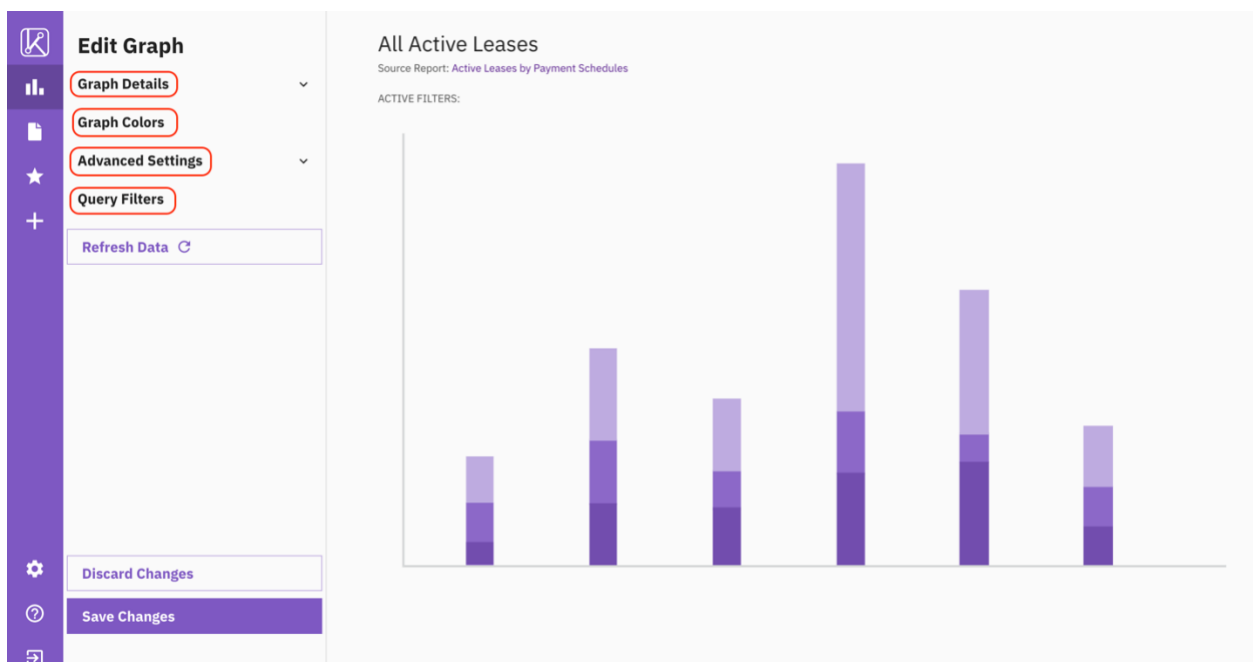
Cancel Skip

- b. Cancel: clicking cancel will return you back to the list of graphs and lose any of your selections from previous pages.

6. Selecting the Graph Settings

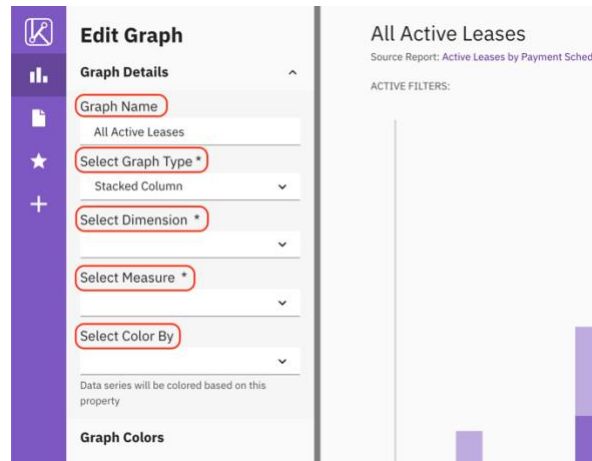
Once the graph has been created, you will be navigated to edit your graph. The following section is divided according to the four drawers visible in the graph customization panel (Graph Details, Graph Colors, Advanced Settings, Query Filters).

Open a drawer by clicking on the header.

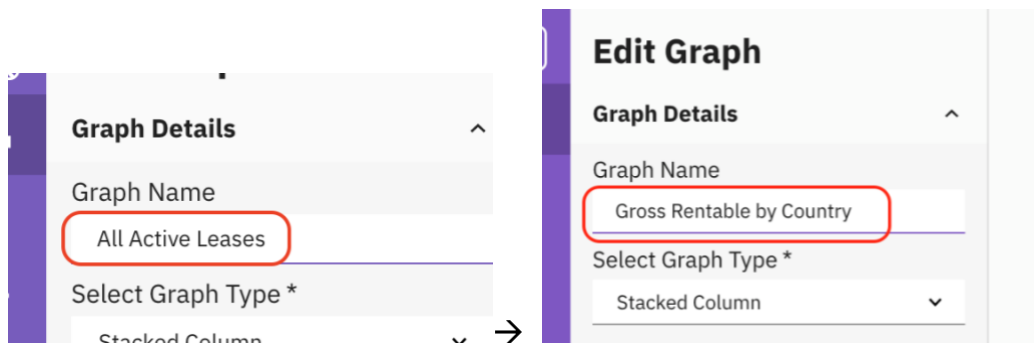


a. Graph Details

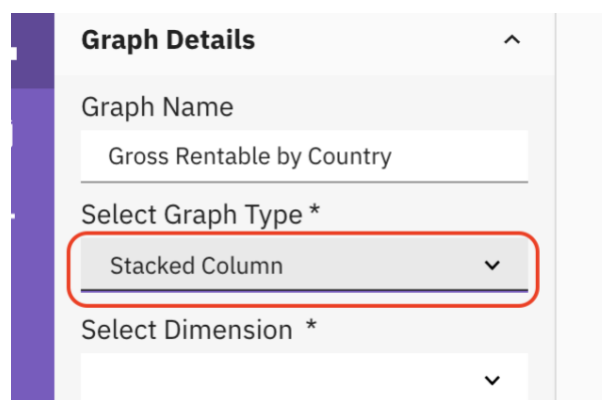
Note: The Graph Name and Graph Type have been pre-populated based on your earlier selections, but they can still be changed. When creating a graph, the Graph Details drawer will auto open.



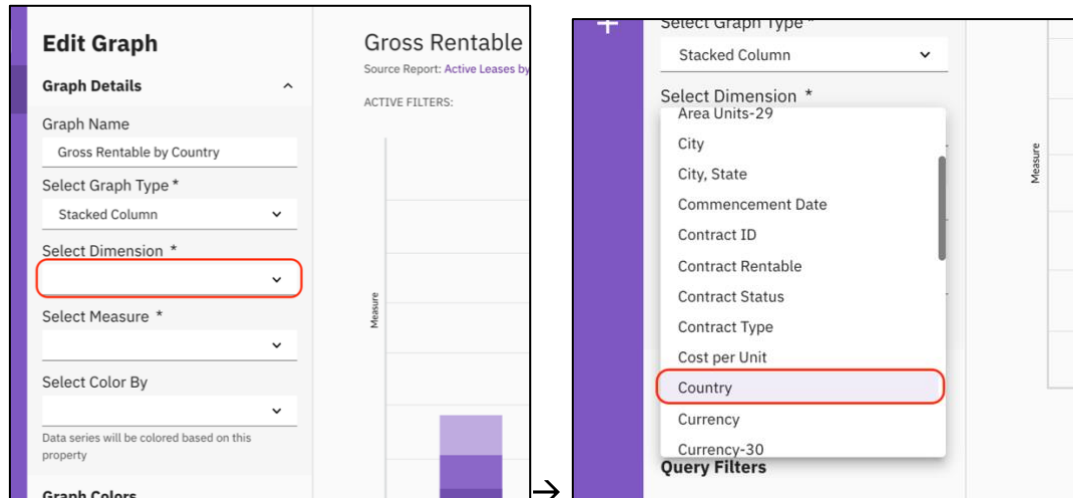
- i. **Graph Name:** to rename your graph, click into the white box under Graph Name and type your desired name.



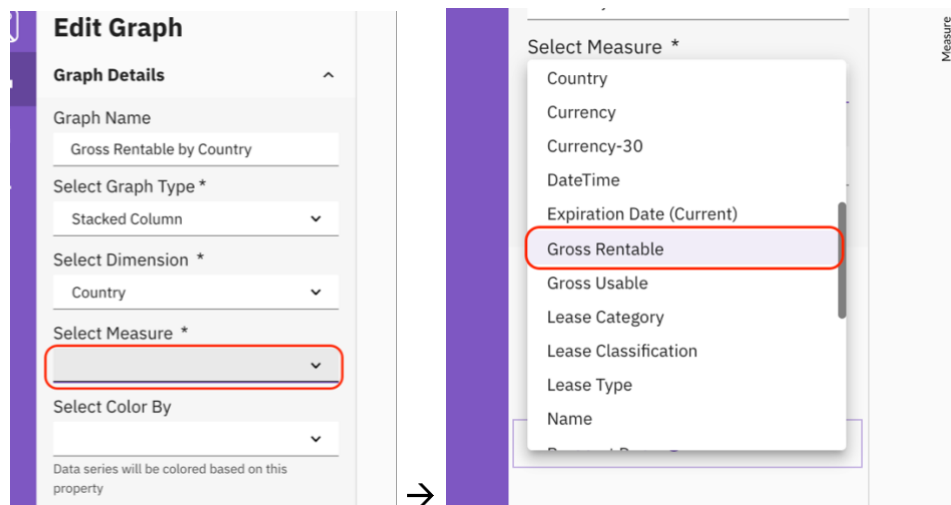
- ii. **Select Graph Type:** Click the drop-down menu (▼) to change the type of graph being used to portray the data



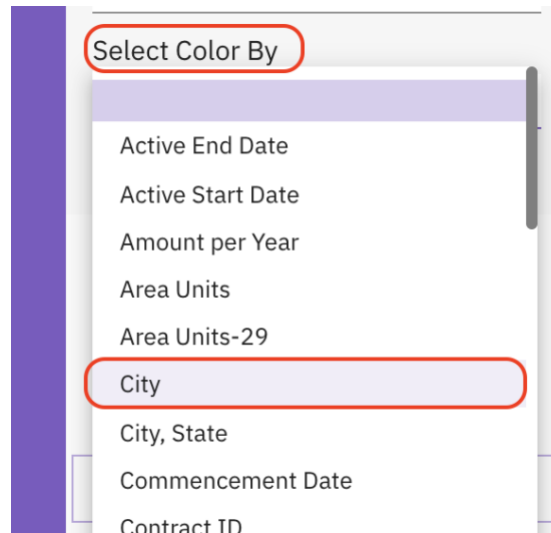
- iii. **Select Dimension:** Click the drop-down menu (▼) to select the Dimension field from the fields within the query/report



- iv. **Select Measure:** Click the drop-down menu (▼) to select the Measure field from the fields within the query/report



- v. **Select Color By:** Click the drop-down menu (▼) to select a field that will colour the data set

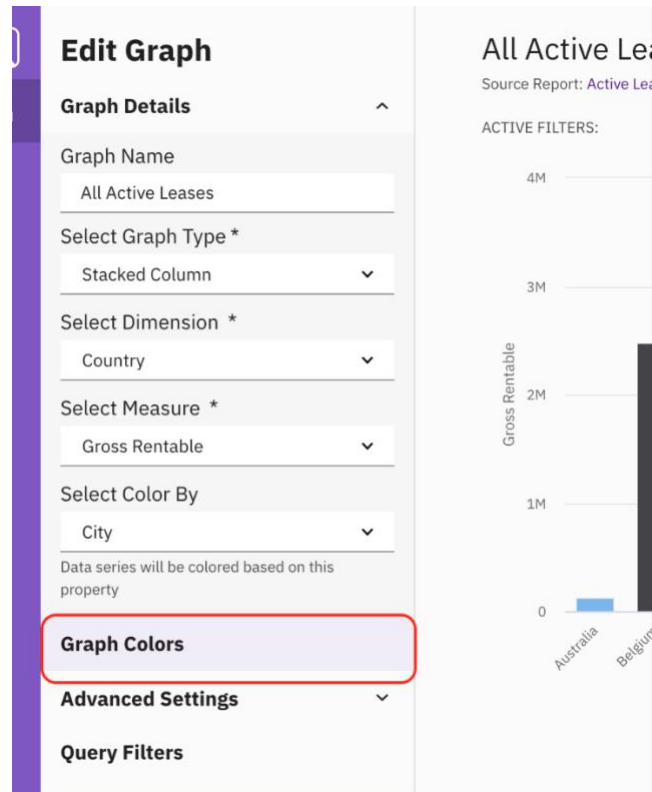


- vi. **Graph Preview:** As you make your selections, you can see the preview of the graph to the right

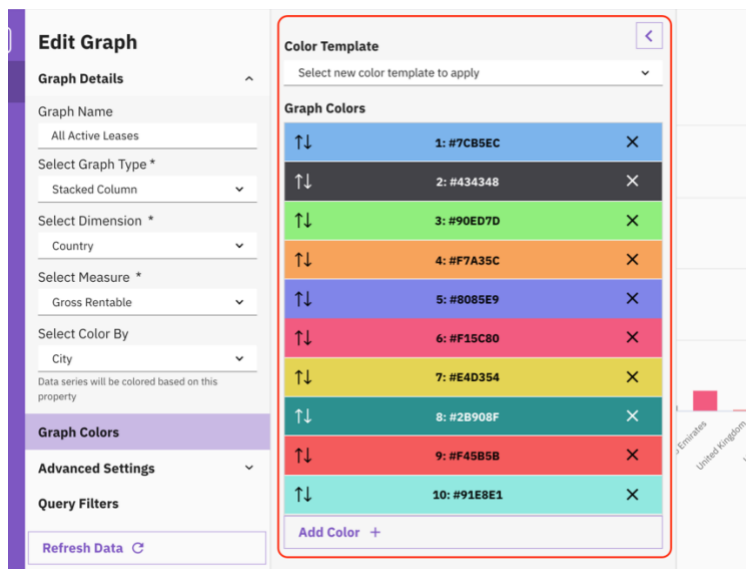


- b. **Graph Colors:** You can easily adjust the colors used in your graph.

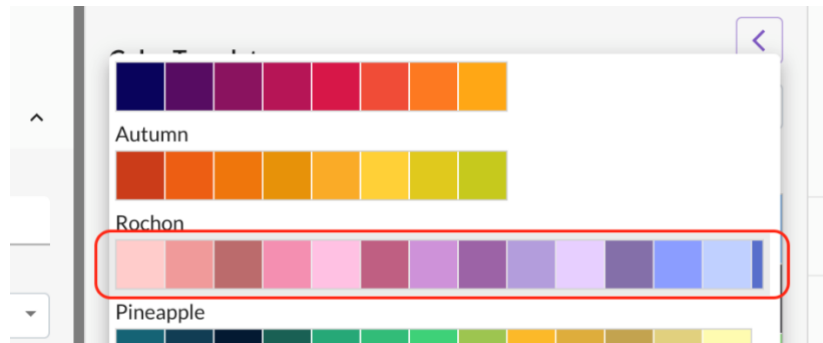
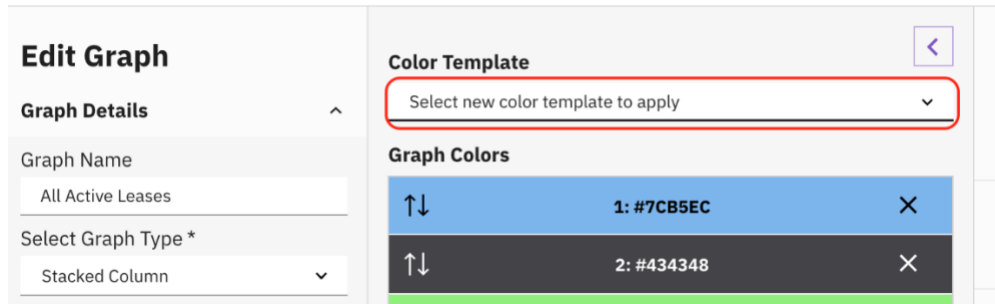
- i. Select the Graph Colors drawer.



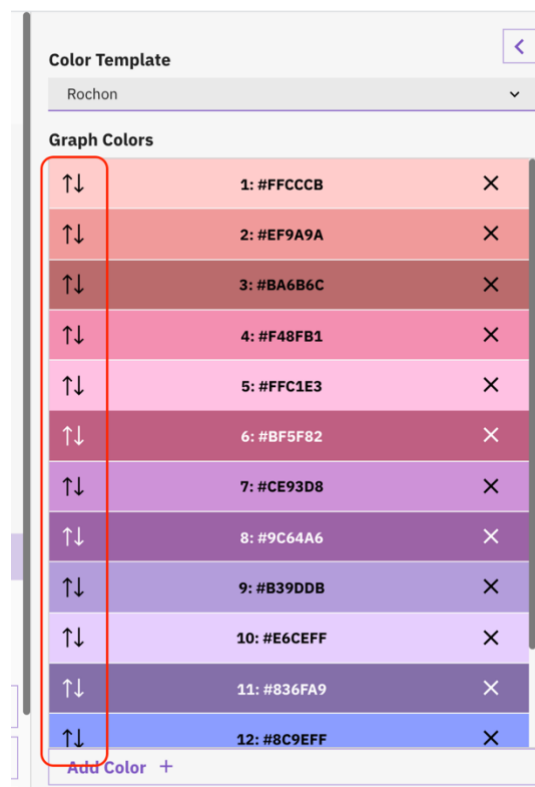
- ii. A panel will pop up to the right.



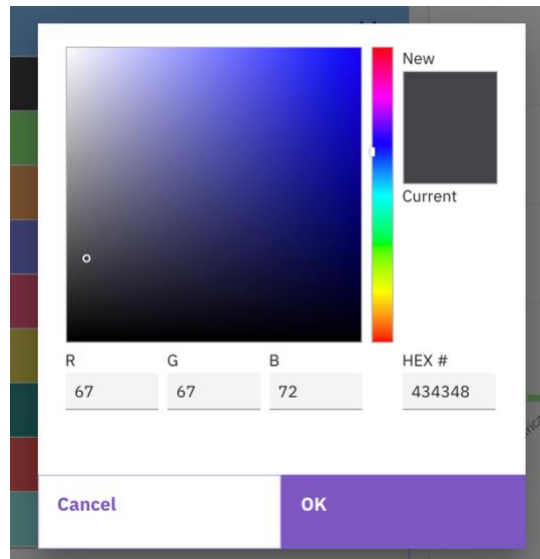
- iii. Select a color template by clicking the drop-down menu (▼) under Color Template. Then select a color template from a the list of color templates.



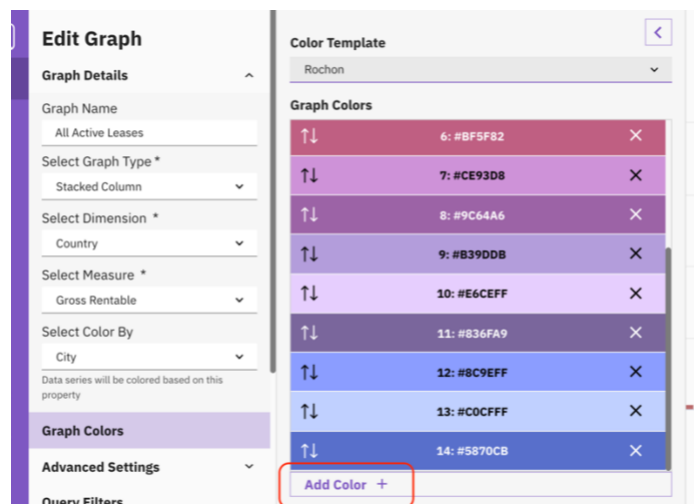
- i. Drag and drop colors to change the order of the colors

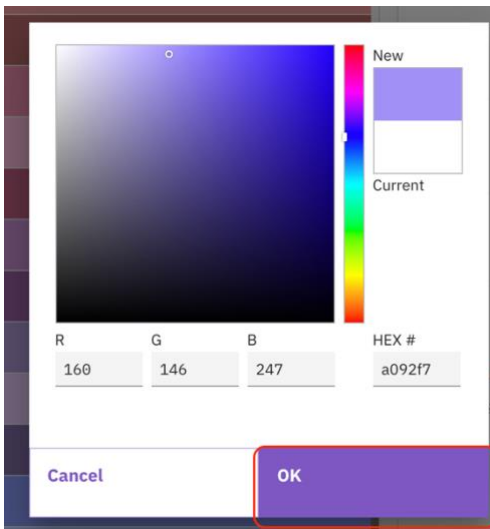



- ii. Select a color to change the color using the Color Picker, or input an RGB or Hex Code (#) in the appropriate boxes

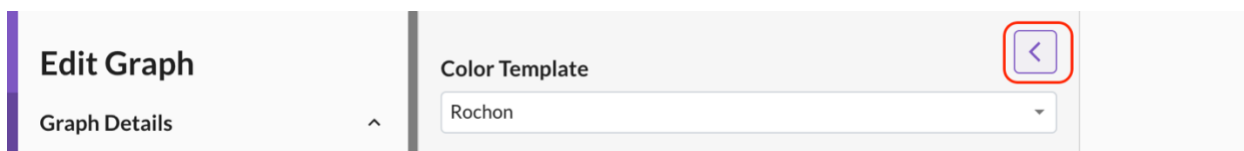


- c. Add a color by clicking the Add Color button, choose your color, and then click 'OK'.





- d. To close the Graph Colors side panel, click on the back icon (). It will auto close if you select other drawers



e. Advanced Settings: Graph Settings

- i. Click 'Advanced Settings' to open the drawer, and then click 'Graph Settings' to open the panel to the right

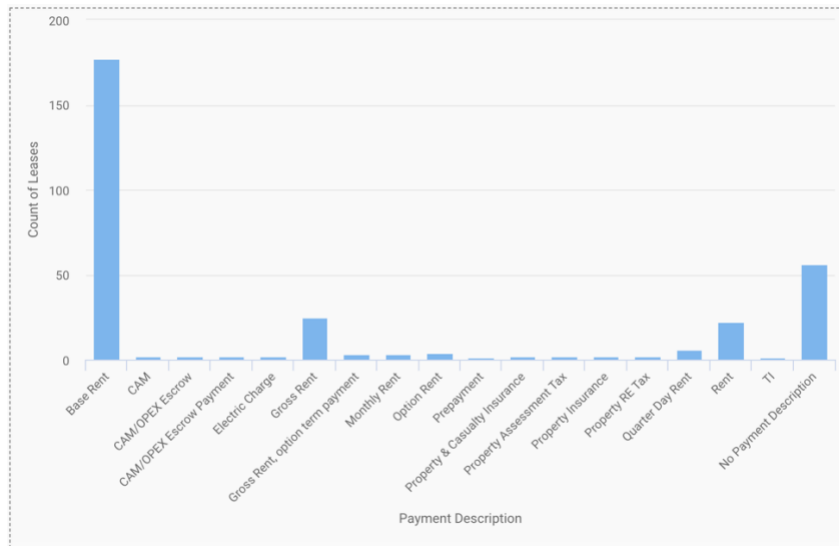
The screenshot shows the 'Edit Graph' interface. On the left, under 'Graph Details', 'Total Parking Spaces' is entered in the 'Graph Name' field. 'Stacked Column' is selected for 'Select Graph Type'. 'Country' is selected for 'Select Dimension'. 'Gross Area' is selected for 'Select Measure'. 'Parent Building' is selected for 'Select Color By'. Under 'Graph Colors', 'Advanced Settings' is expanded, and 'Graph Settings' is highlighted with a red box. On the right, the 'Advanced Graph Settings' panel is open. It contains three sections: 'Axis Settings', 'Legend Settings', and 'Stacking Settings'. In 'Axis Settings', 'Sort Dimension by Value' has radio buttons for 'Default' (selected), 'Ascending', and 'Descending'. Below it, 'Measure Axis Range' has two input fields for 'Min Value' and 'Max Value'. In 'Legend Settings', 'Show Legend' is checked. 'Floating Legend' is unchecked. 'Item Layout' has radio buttons for 'Vertical' (selected), 'Horizontal', and 'Proximate'. 'Horizontal Alignment' has radio buttons for 'Left', 'Center', and 'Right' (selected). 'Vertical Alignment' has radio buttons for 'Top' (selected), 'Middle', and 'Bottom'. In 'Stacking Settings', 'Reverse Stacking Order' and 'Percentage Stacking' are both unchecked.

ii. Axis Settings

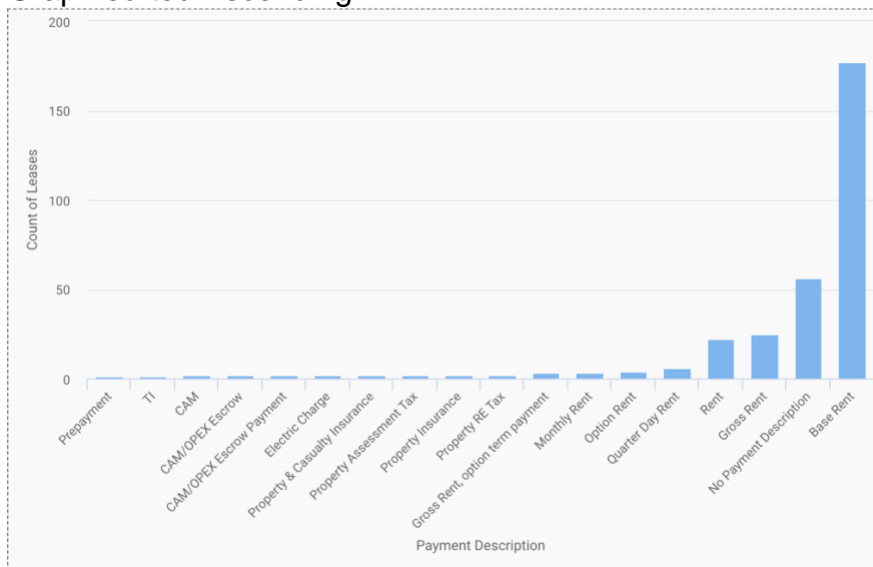
This is a close-up of the 'Axis Settings' section within the 'Advanced Graph Settings' panel. It shows the 'Sort Dimension by Value' section with three radio buttons: 'Default' (selected), 'Ascending', and 'Descending'. Below this is the 'Measure Axis Range' section, which consists of two input fields labeled 'Min Value' and 'Max Value' separated by a minus sign.

- **Sort Dimension by Value:** sort your graph according to the total measure value of each Dimension. You can sort by ascending or descending.

Unsorted Graph:



Graph sorted Ascending:

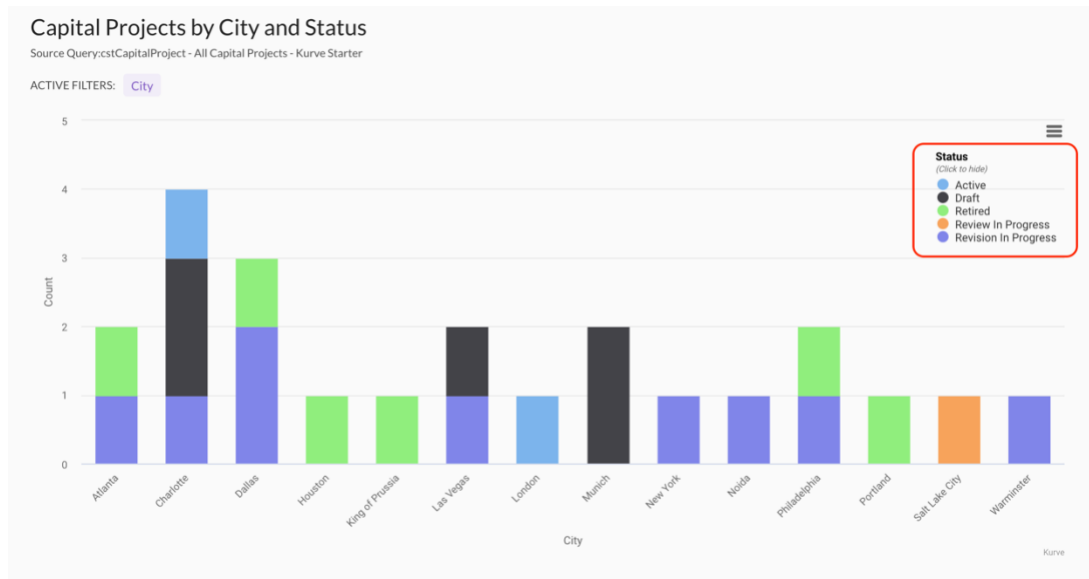


- **Measure Axis Range:** Set the minimum and maximum of the measure's axis.

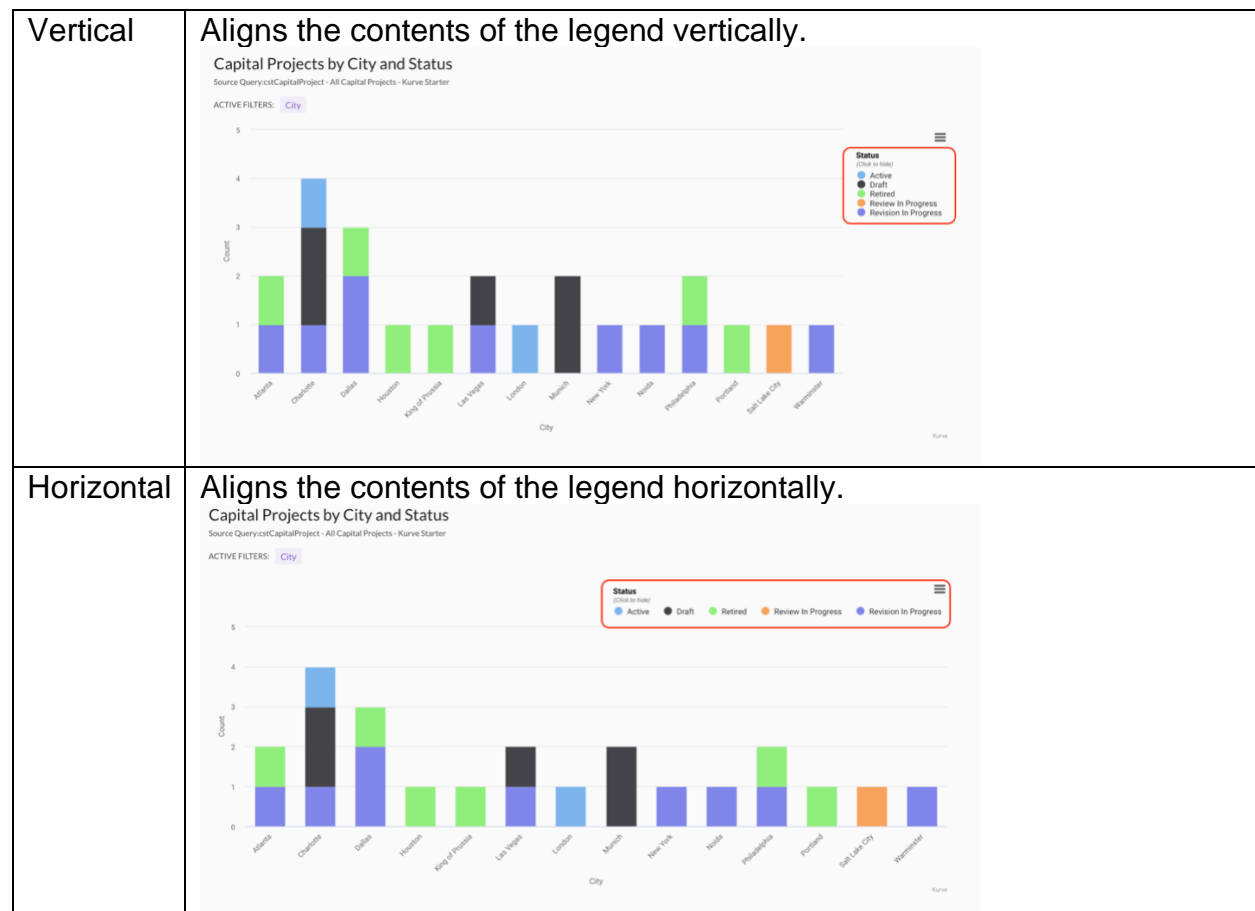
iii. Legend Settings

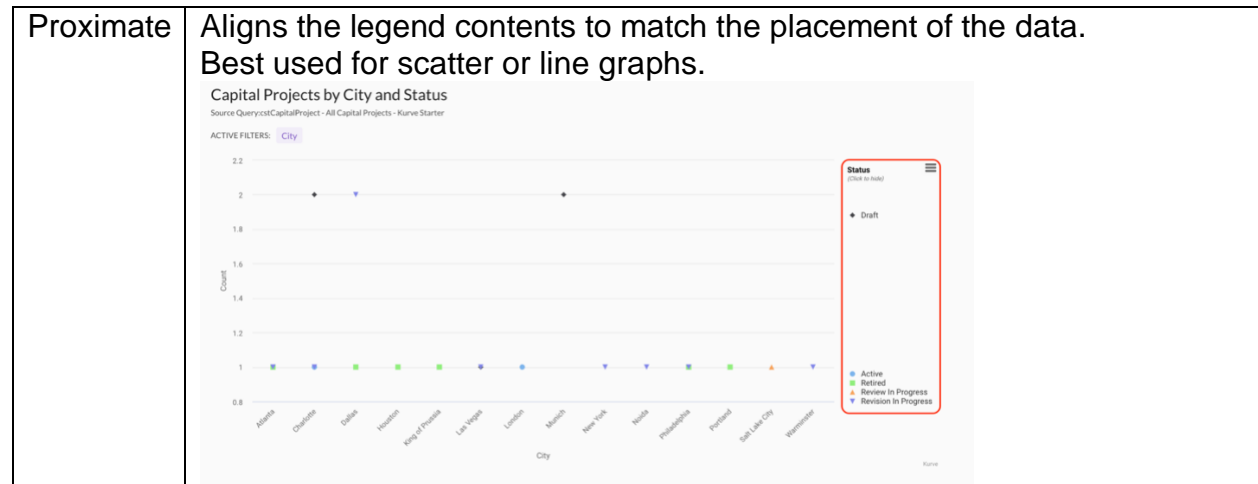
- **Show Legend:** Checked by default, uncheck to hide legend

Floating Legend: Check to put the legend location within the confines of the graph.
Note: this option could cause your legend to overlay on top of graph segments

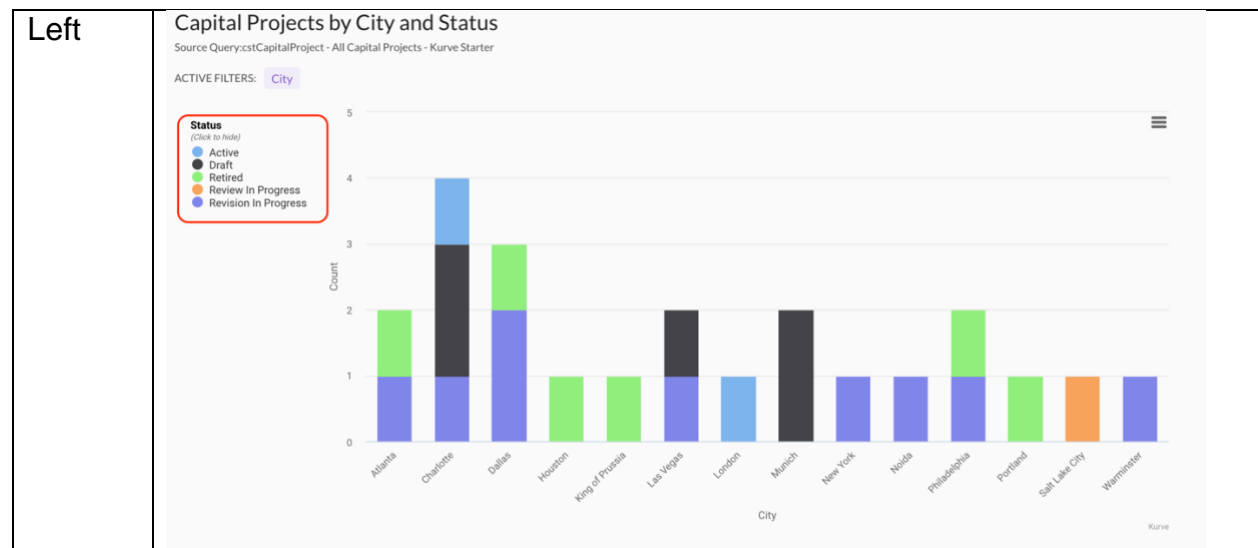


Item Layout: the following shows adjusting the item layout placement while keeping the other legend options default (Right, Top)



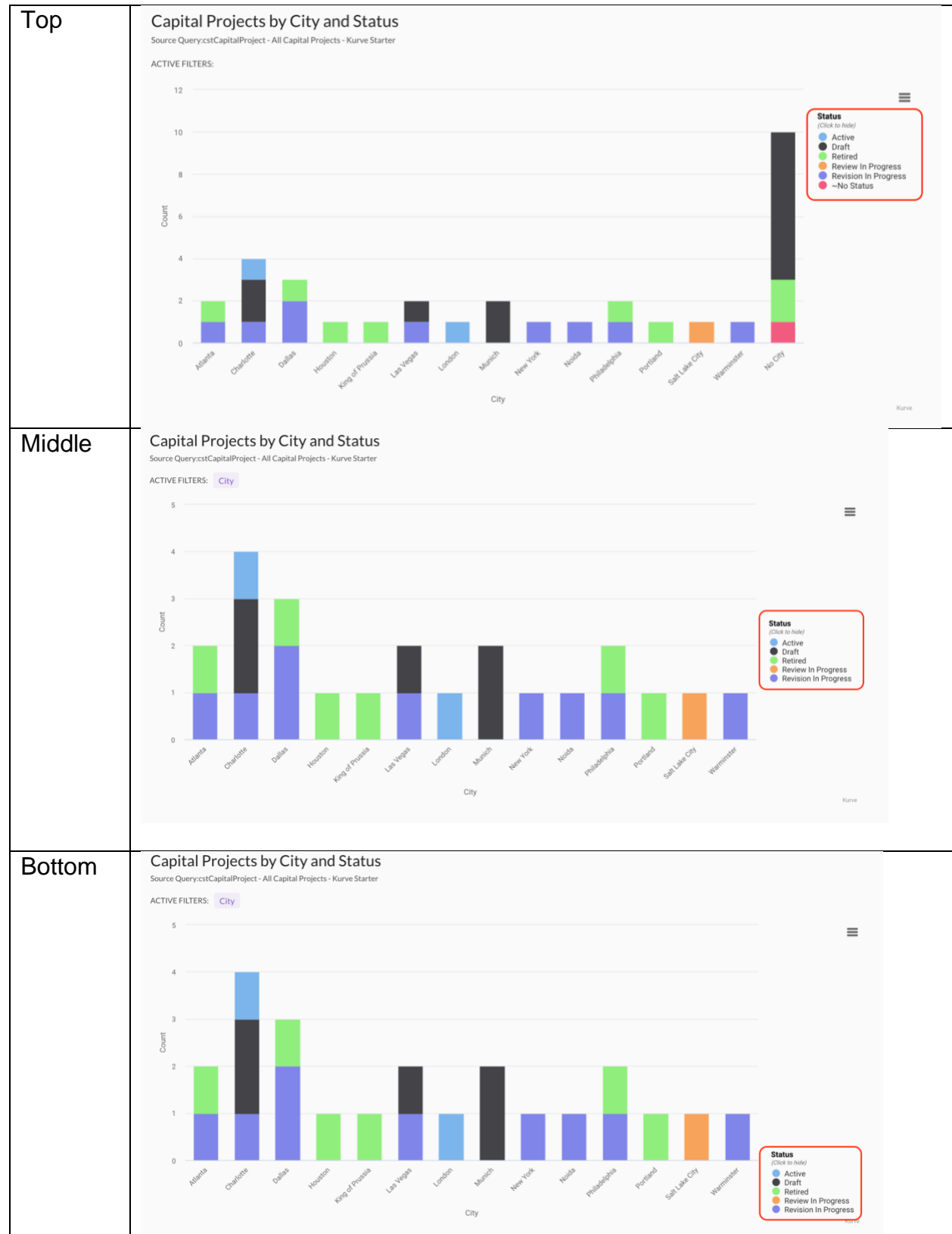


Horizontal Alignment: the following shows what the legend placement will look like adjusting horizontally while keeping the other options default (Vertical, Top)



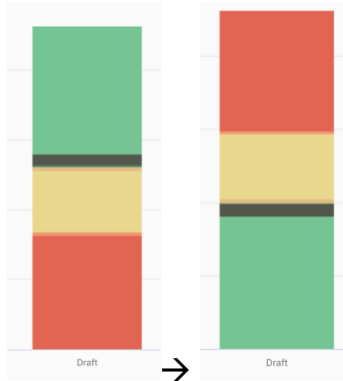


Vertical Alignment: the following show what the legend placement will look like adjusting vertically while keeping the other options default (Vertical, Right)



iv. Stacking Settings

- *Reverse Stacking Order*: click this setting to stack your graph in the opposite order



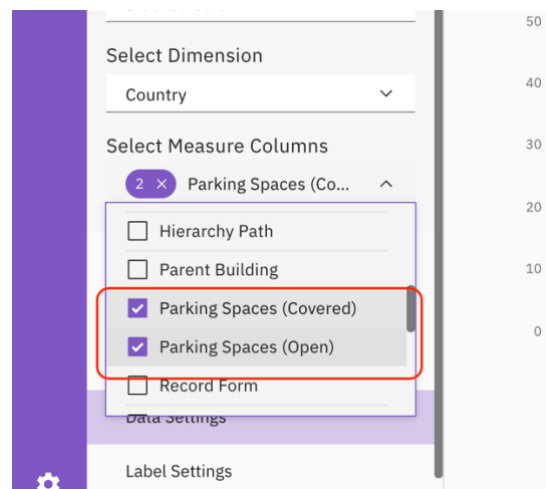
- *Percentage Stacking*: expands each bar/column to fill the entire range of the graph. This type of graph shows the relative contribution of each part to the whole, rather than the raw numerical values.

f. Advanced Settings: Data Settings

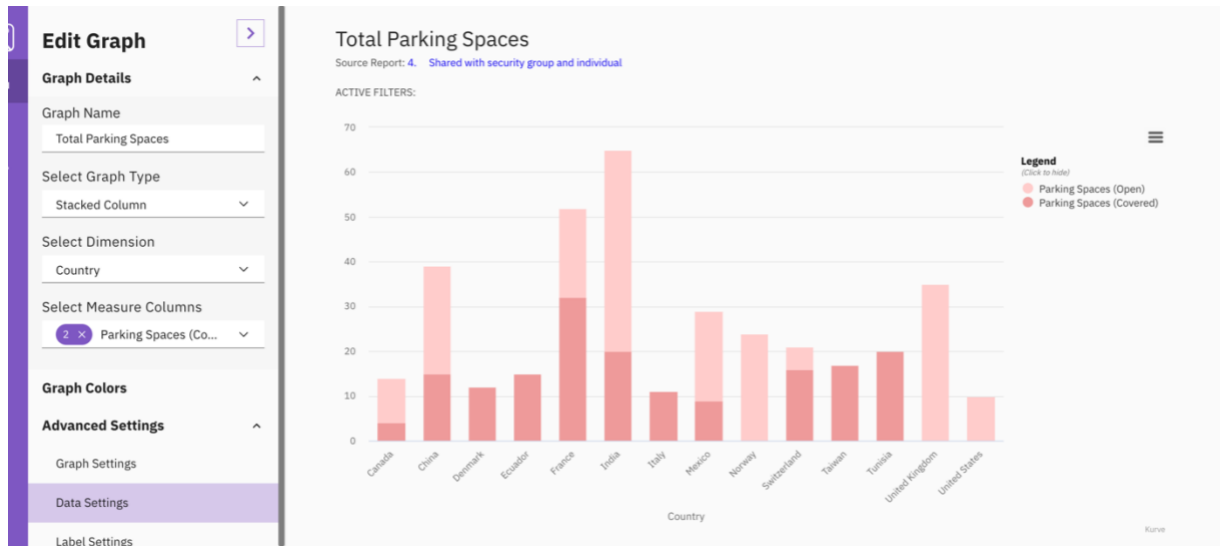
- Click Advanced Settings and then Data Settings:

The screenshot shows the Kurve Admin interface. On the left, the 'Advanced Settings' section is expanded, and the 'Data Settings' option is highlighted with a red box. On the right, the 'Data Settings' panel is displayed, showing a warning message and three checkboxes: 'Use Distinct Count of Measure values', 'Use Average of Measure values', and 'Define Multiple Series'. The 'Apply Report Filters' checkbox is checked.

- *Use Distinct Count of Measure values: use a distinct count of measure values. This will change the values to count the measure value rather than show a sum.*
- *Use Average of Measure values: calculate the average of the measure value. This will change the values graphed to the average measure value rather than a sum or count.*
- *Define Multiple Series: create a graph with multiple measure values from the same record.*
 - I. Select “Define Multiple Series”. This will auto option Graph Details, if it does not, simply click Graph Details to open it up. (Note: You will need to reselect your measure values!)
 - II. Select your Dimension (x-axis).
 - III. Select your Measure Columns – you can select up to 10. In this example I have selected Parking Spaces (Covered) and Parking Spaces (Open).



- IV. Preview the graph results. Click ‘Save Changes’ once you are ready to publish the graph.

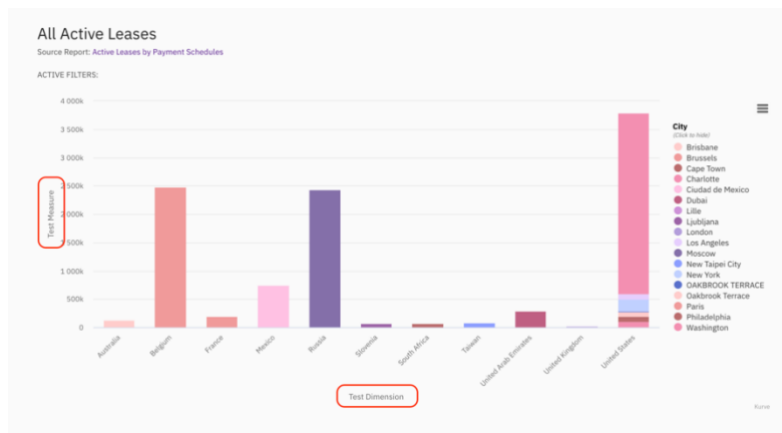


- *Apply Report Filters (Report Graphs Only):* Checked by default, uncheck to ignore the filters on the source report
- *Use Aggregation Data (Aggregation Report Graphs Only):* Checked by default, uncheck to use non-aggregated data from the source report

g. Advanced Settings: Label Settings

- Click Advanced Settings and then Label Settings:

- ii. **Axis Labels:** Adjust your Dimension and/or Measure labels displayed on the graph.



- iii. Data Labels: enable a label option by clicking on the box next to it.

Data Labels

☐ Show Data Labels

☐ Show Stack Labels

☐ Show Graph Total

- *Show Data Labels*: Select if you want to show the value of each segment overlaid onto the graph.

Data Labels

☒ Show Data Labels

Data Label Prefix

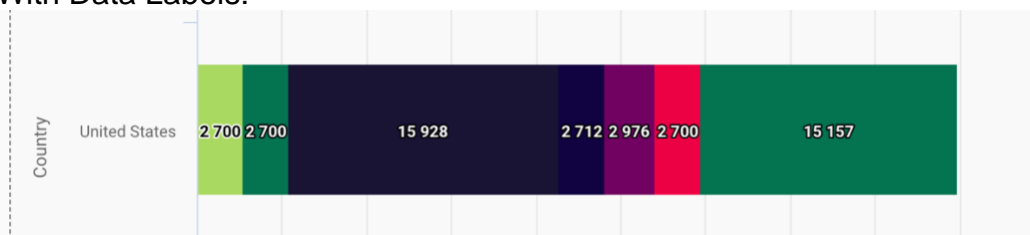
Data Label Decimals

☐ Show Stack Labels

Without Data Labels:



With Data Labels:



Data Label Prefix: input a symbol to add it to the beginning of your data label (e.g. \$)

Data Label Decimals: input the number of decimals you want displayed in your data label (e.g. 2)

Data Labels

☒ Show Data Labels

Data Label Prefix

\$

Data Label Decimals

0|

- *Show Stack Labels*: Select to show the sum of the entire segment at the end of each bar.

Data Labels

☐ Show Data Labels

☒ Show Stack Labels

Stack Label Prefix

Stack Label Decimals

☐ Show Graph Total

Without Stack Labels:



With Stack Labels:

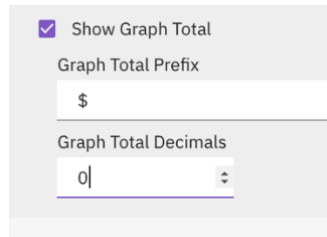


Stack Label Prefix: input a symbol to add it to the beginning of your stack label (e.g. \$)

Stack Label Decimals: input the number of decimals you want displayed in your stack label (e.g. 2)

- *Show Graph Total*: enable this option to display the total of all of your measure values.

Example:



iv. *Tooltip Labels*: Format your tooltip labels here:

- *Tooltip Prefix*: input a symbol to add it to the beginning of your tooltip label
- *Tooltip Decimal*: this will round your number according to how many decimals you input

v. *Thousands Separator*: if you would like to use a symbol other than a space to format your larger numbers, you can input any symbol in this box to add it. This will format both data, stack, and tooltip labels.

For example, let's add a comma as the Thousand Separator:

Thousands Separator

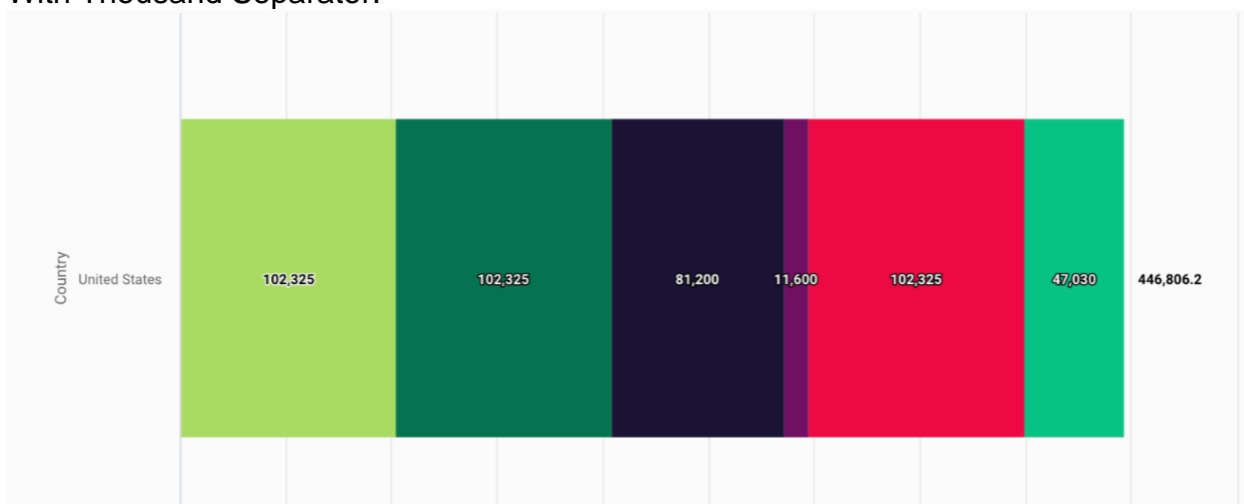
,

This changes the label format.

Without Thousand Separator:

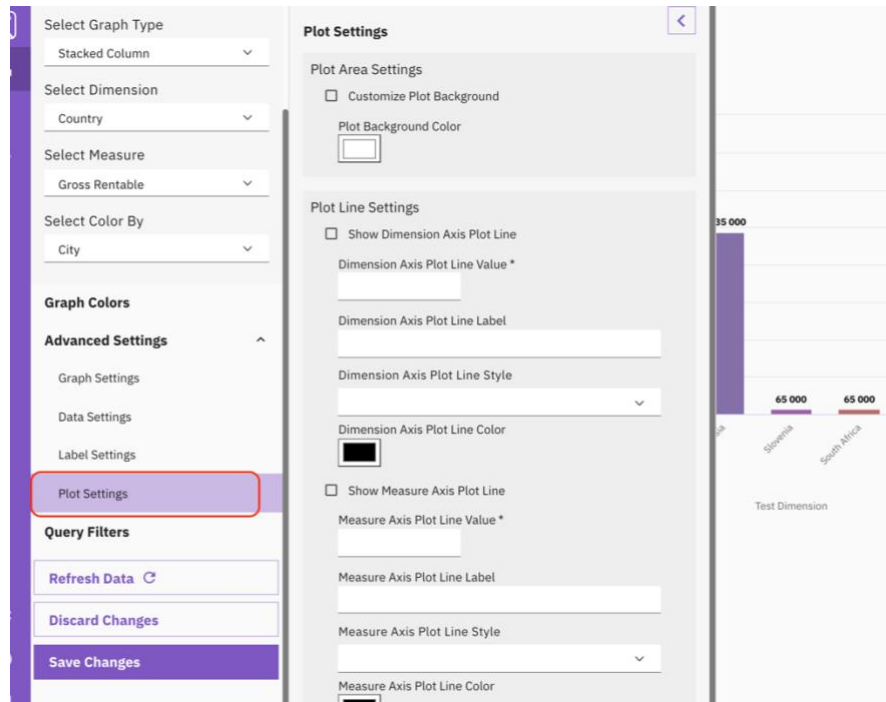


With Thousand Separator:

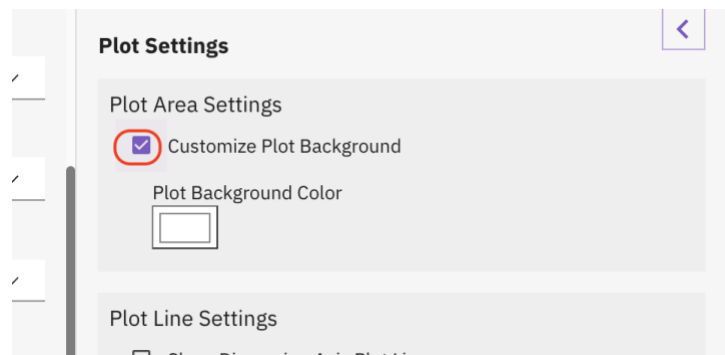


h. Plot Settings: Adjust Plot Background Color and Add Plot Lines

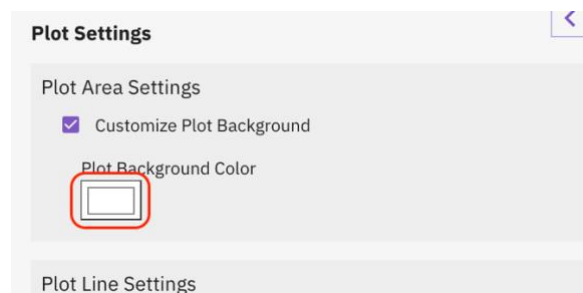
Select Plot Settings under Advanced Settings to open the drawer.



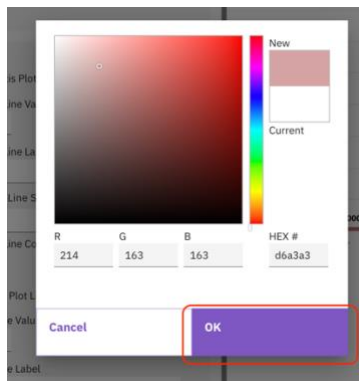
- i. Plot Area Settings: Plot Background Color
- To customize the plot background, select the “Customize Plot Background” box.



- Under Plot Background Color, select the color box to open the color picker.



- Edit the color then click Ok.

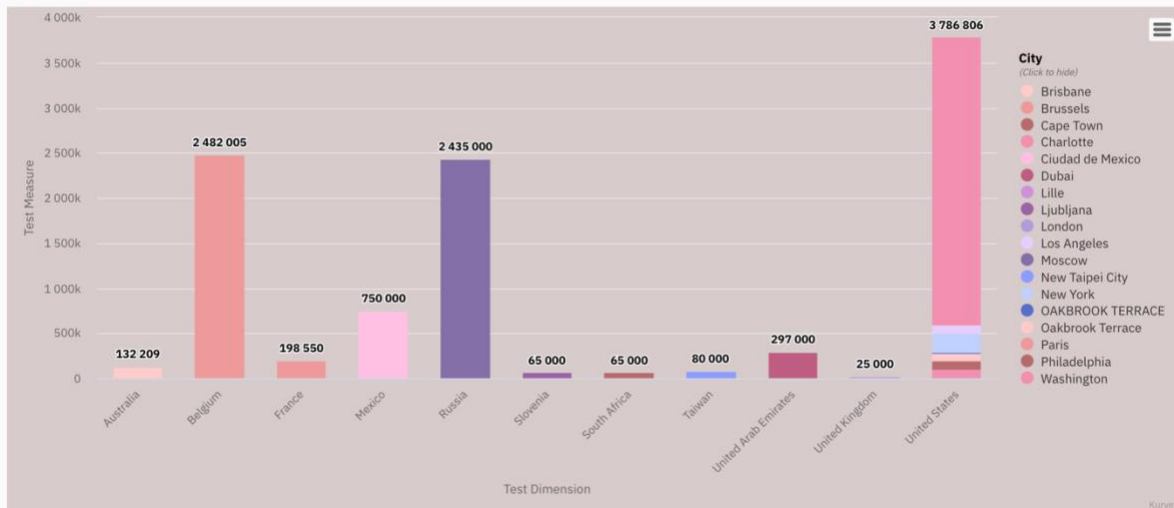


- The Plot Background color will update

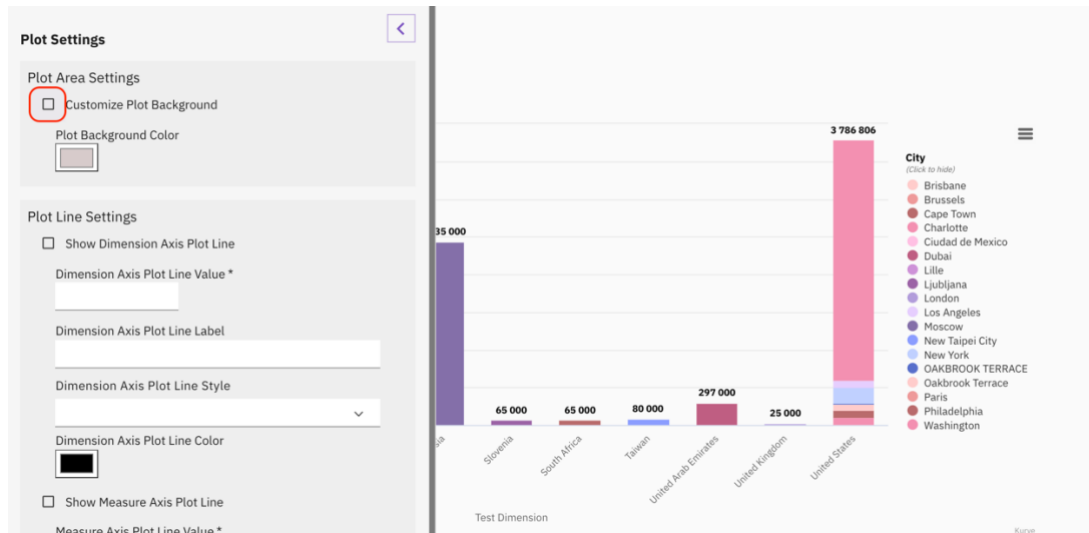
All Active Leases

Source Report: [Active Leases by Payment Schedules](#)

ACTIVE FILTERS:



- To reset the background to default, deselect Customize Plot Background checkbox.



ii. Plot Line Settings: Add static plots lines along the x- and y-axis to mark a threshold on a graph.

- Select “Show Dimension Axis Plot Line” to enable the line. The Dimension plot line refers to the number of data points on the dimension.

This image is a close-up of the 'Plot Line Settings' panel. The checkbox for 'Show Dimension Axis Plot Line' is highlighted with a red circle. Below the checkbox are input fields for 'Dimension Axis Plot Line Value *', 'Dimension Axis Plot Line Label', and a dropdown for 'Dimension Axis Plot Line Style'.

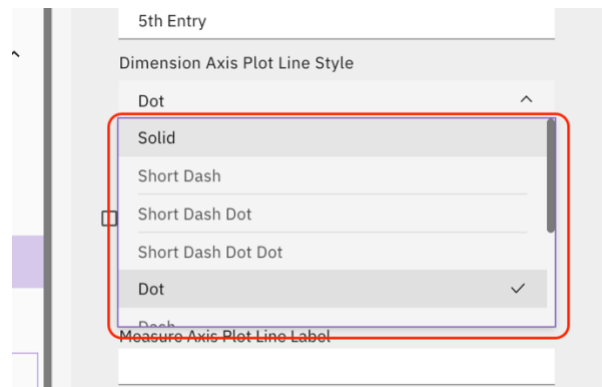
- Dimension Axis Plot Line Value: this controls where the line is placed. Enter a numerical value.

This image is a close-up of the 'Dimension Axis Plot Line Value' input field in the 'Plot Line Settings' panel. The input field contains the number '4' and is highlighted with a red circle. Below the input field are fields for 'Dimension Axis Plot Line Label' and 'Dimension Axis Plot Line Style'.

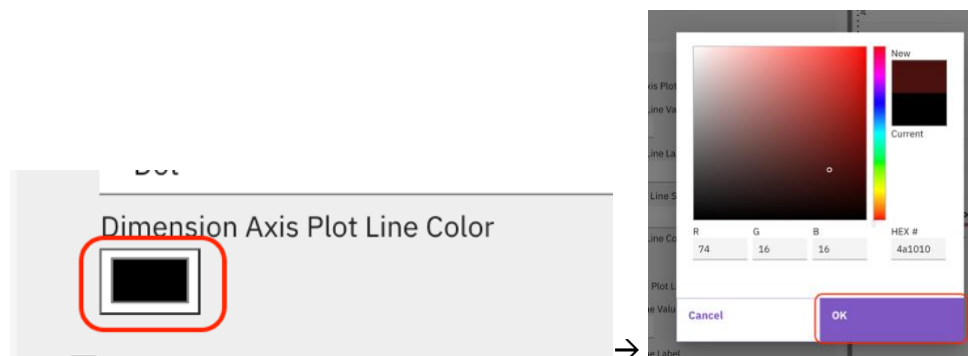
- Dimension Axis Plot Line Label: title the plot line within the graph



- Dimension Axis Plot Line Style: control the type of line used in the plot area



- Dimension Axis Plot Line Color: adjust the color of the plot line. Click into the color box to open the color picker. Click Ok once you have your desired color.



- Disable the plot line at any point by de-selecting the “Show Dimension Axis Plot Line” check box.



Plot Line Settings

☒ Show Dimension Axis Plot Line

Dimension Axis Plot Line Value *

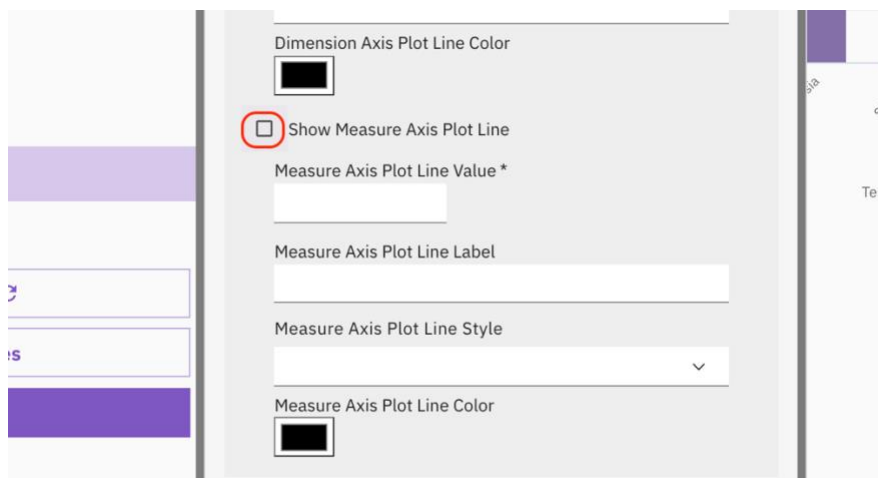
4

Dimension Axis Plot Line Label

Plot

Note: Plot lines on the dimension axis will be most useful for Scatter graphs, or graphs where the dimension is numerical. For graphs where the dimension is separated into categories, the plot line will be placed at the n-th category on the axis, starting at 0. For example, a dimension plot line with a value of 3 will appear on the 4th category on the axis.

- Select “Show Measure Axis Plot Line” to enable the plot line along the measure axis.



Dimension Axis Plot Line Color

☐ Show Measure Axis Plot Line

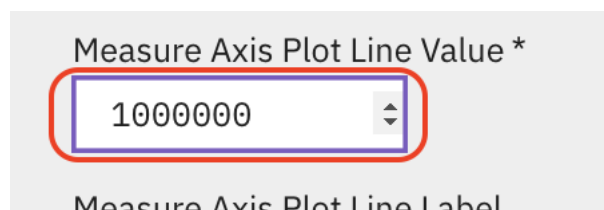
Measure Axis Plot Line Value *

Measure Axis Plot Line Label

Measure Axis Plot Line Style

Measure Axis Plot Line Color

- Measure Axis Plot Line Value: this controls where the line is placed. Enter a numerical value.

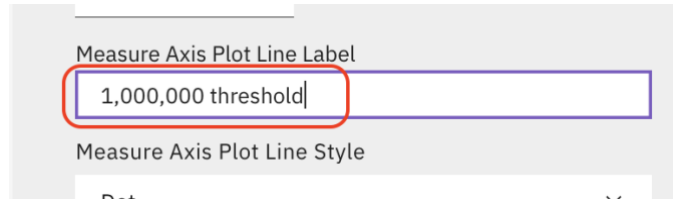


Measure Axis Plot Line Value *

1000000

Measure Axis Plot Line Label

- Measure Axis Plot Line Label: title the plot line within the graph



Measure Axis Plot Line Label

1,000,000 threshold

Measure Axis Plot Line Style

- Measure Axis Plot Line Style: control the type of line used in the plot area



Measure Axis Plot Line Style

Dot

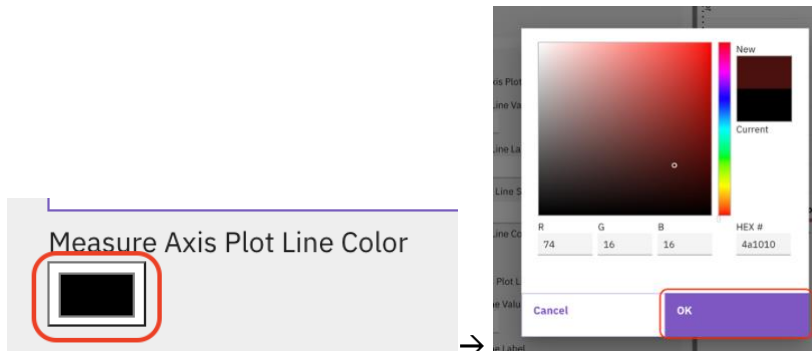
Solid

Short Dash

Short Dash Dot

Short Dash Dot Dot

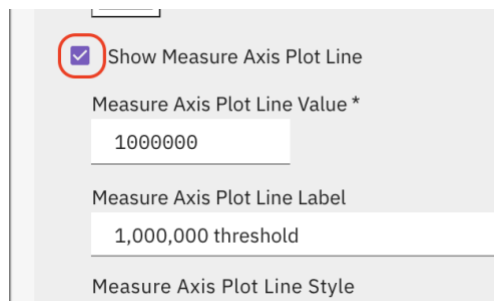
- Measure Axis Plot Line Color: adjust the color of the plot line. Click into the color box to open the color picker. Click Ok once you have your desired color.



Measure Axis Plot Line Color

Color picker dialog box showing a color gradient and the 'OK' button.

- Disable the plot line at any point by de-selecting the “Show Measure Axis Plot Line” check box.



☒ Show Measure Axis Plot Line

Measure Axis Plot Line Value *

1000000

Measure Axis Plot Line Label

1,000,000 threshold

Measure Axis Plot Line Style

Note: plot lines on the measure axis will be useful to indicate easy to read thresholds.

- View your plot lines in the graph preview



- Query Filters:** Easily add or edit query filters by clicking on the Query Filter button. Query Filters can be added to any field on the Primary BO. Query Filters will prompt before loading the report to reduce the results you would like to load from the query.

Select Graph Type

Stacked Column

Select Dimension

Country

Select Measure

Total Parking Spaces

Select Color By

Parent Building

Graph Colors

Advanced Settings

Graph Settings

Data Settings

Label Settings

Plot Settings

Query Filters

Refresh Data

Query Filters 1/12

Only columns from the Primary Business Object can be selected for Query Filters. Some columns on the query may not be available.

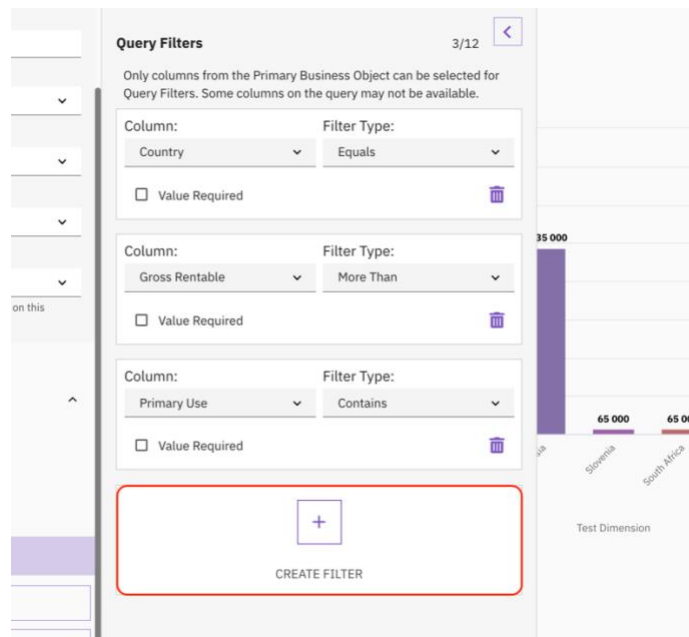
Column: City Filter Type: In

☐ Value Required

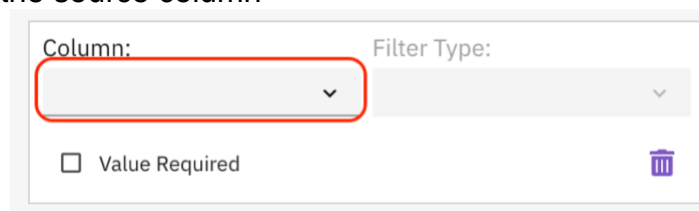
+

CREATE FILTER

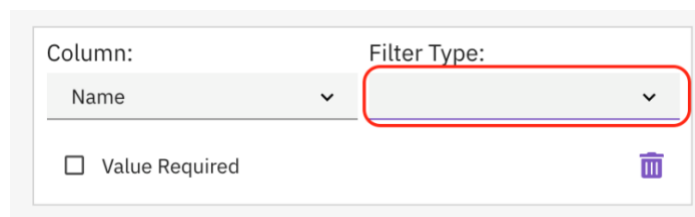
- i. A panel will appear to the right. It will be pre-populated with any you made during the creation of your graph. To add a new one, click 'Create Filter.'



- ii. Select the source column



- iii. Select your Filter Type. The options will change depending on the field type (i.e. Text, Number or Date)



- iv. Select whether you would like to make this value required before loading the graph. This means the user will need to input a filter value before they can load the graph. If it is not required, they have the choice to fill it in or skip it.

Column:

Filter Type:

Name

In

☐ Value Required

- v. To remove a query filter, click on the trash icon on the bottom left of the box.

Column:

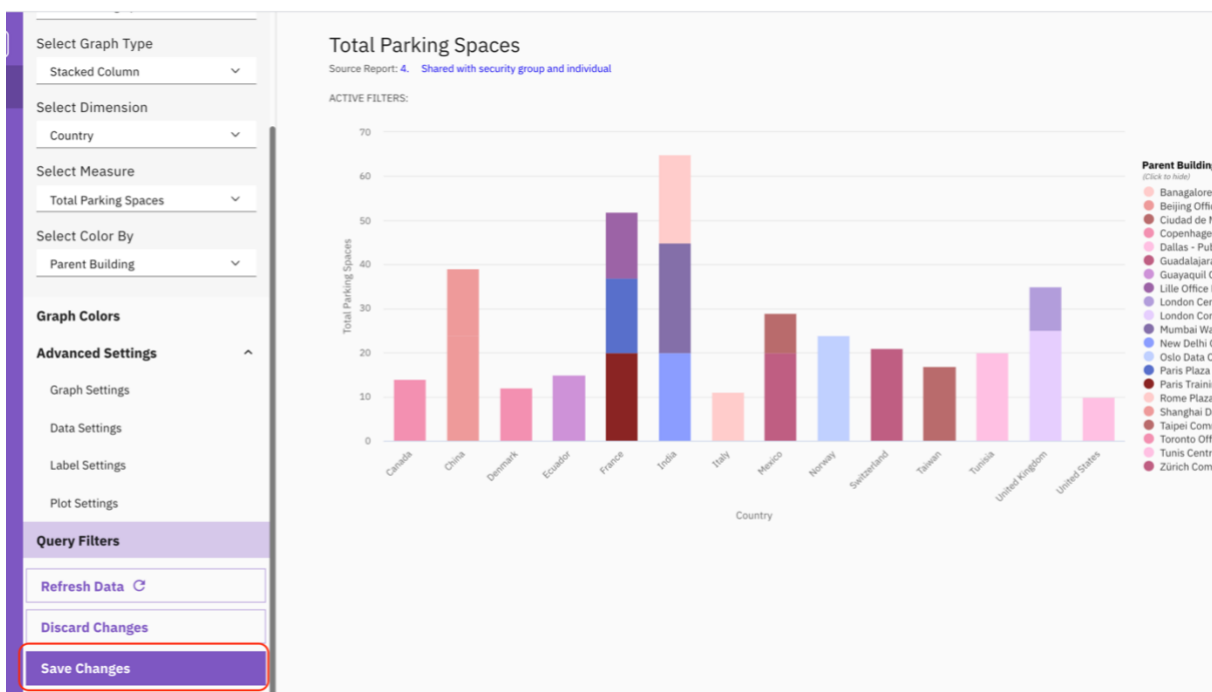
Filter Type:

Name

In

☐ Value Required

- vi. You can add up to 12 query filters by clicking 'Create Filter'. Once you are happy with your selections you can 'Save Changes' or continue editing your graph.



- vii. Upon clicking 'Save and Close', your query filter will prompt before viewing the graph. The 'In' filter allows you to filter for multiple text values. For example, let's load this graph for United Kingdom, Canada, and France.

Enter Query Filter value(s)
Values are case-sensitive

Country
In Canada,France,United Kingdom

Gross Rentable
More Than

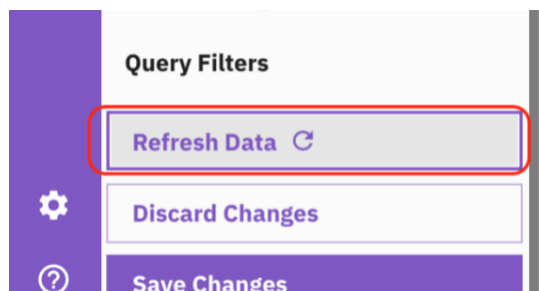
Primary Use
Contains

Cancel Apply

viii. Click 'Apply' and view your graph results.



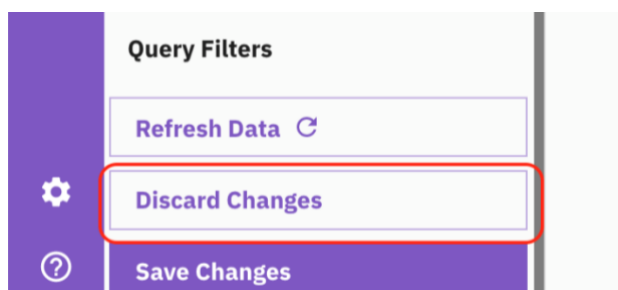
- j. **Refresh Data:** This allows you to edit the values you are filtering or view the most update to date version of your data.
- i. Click the Refresh Data button (🔄)



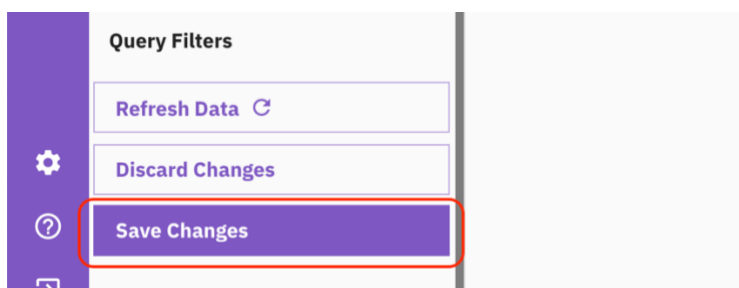
- ii. Input new values for your query filters.

Note: You can do this from this window to see how your graph will change or in the graph view page.

- k. **Discard Changes:** if you do not wish to Save any change you have made while in the edit graph panel, click Discard Changes. This will revert your graph back to what it was before opening the edit graph panel.



- l. **Save:** When you are satisfied with your graph, click 'Save Changes.' The final, publishable graph will be displayed.




Note: For further information regarding a published graph's toolbar (i.e. using Graph Filters, Copy, Edit, etc.) please refer to the **Graphs Portal, Section 3. Using a Specific Graph's Toolbar.**

For further information regarding the navigating through the graph, please refer to **Graphs Portal, Section 6. Navigating Through Graph Data.**

CREATE A REPORT


1. Selecting the Report Record Type

- a. From the Kurve Dashboard, click on the Create Icon () to create a new record;
- b. Select 'Report' as your record type (options being Graph or Report);


[Cancel](#)

Please select a record type

☒ Select Record Type ☐ Select Data Source ☐ Create Query Filters ☐ Name Graph/Report



Graph



Report

2. Creating the Report from a Query

- a. Select the query you would like to use to make your graph:
Columns are organized in a table by Query Title, Query Name, Module, BO and Tags.

[Cancel](#) [Back a step](#)

Select a query

☐ Select Record Type ☒ Select Data Source ☐ Create Query Filters ☐ Name Graph/Report

Rows per page: 10 1-10 of 10

QUERY TITLE	QUERY NAME	MODULE	BO	TAGS	TYPE
Contains	Contains	Contains	Contains	Contains	
All Active Leases	cstRealEstateContract - All Active Lease Data - Kurve Starter	triContract	triRealEstateContract	Kurve Starter Queries	Query
All Active Leases and Payment Schedules	cstRealEstateContract - All Active Lease and Payment Schedules - Kurve Starter	triContract	triRealEstateContract	Kurve Starter Queries	Query
All Buildings with Space and Floor Capacity	cstBuilding - All Buildings with Space and Floor Capacity - Kurve Starter	Location	triBuilding	Kurve Starter Queries	Query
All Capital Projects	cstCapitalProject - All Capital Projects - Kurve Starter	triProject	triCapitalProject	Kurve Starter Queries	Query
All Capital Projects and Locations	cstCapitalProject - All Capital Projects and Locations - Kurve Starter	triProject	triCapitalProject	Kurve Starter Queries	Query
All Capital Projects with Contact Roles	cstCapitalProject - All Capital Projects Data with Contact Roles - Kurve Starter	triProject	triCapitalProject	Kurve Starter Queries	Query
All Corrective Work Tasks with Request Class	cstWorkTask - All Corrective Work Tasks with Request Class - Kurve Starter	triTask	triWorkTask	Kurve Starter Queries	Query
All Preventive Work Tasks with Request Class	cstWorkTask - All Preventive Work Tasks with Request Class - Kurve Starter	triTask	triWorkTask	Kurve Starter Queries	Query
All Space Classes	cstSpaceClassCurrent - All Space Classes - Kurve Starter	Classification	triSpaceClassCurrent	Kurve Starter Queries	Query

Back a step	(Top right of screen) Click to back to the previous step to choose a report source
Cancel	(Top left of screen) Click to cancel making a report and go back to the Kurve Dashboard
Search	Click enter in any of the “Contains” boxes to search for your query once filling in your search criteria.

- b. You can search for the query by one or more of the following options: Query Title, Query Name, Module, BO, Tags;

QUERY TITLE	QUERY NAME	MODULE	BO	TAGS	TYPE
Contains	Contains	Contains	Contains	Contains	
All Active Leases	cstRealEstateContract - All Active Lease Data - Kurve Starter	triContract	triRealEstateContract	Kurve Starter Queries	Query
All Active Leases and Payment Schedules	cstRealEstateContract - All Active Lease and Payment Schedules - Kurve Starter	triContract	triRealEstateContract	Kurve Starter Queries	Query

- c. Input your search parameters underneath any of the search options, for example, let's search “Active” under Query Name and “Maintenance” under Tags;

QUERY TITLE	QUERY NAME	MODULE	BO	TAGS	TYPE
Contains	Contains	Contains	Contains	Contains	
	Active			Maintenance	

- d. Click enter or return on your keyboard to initiate the search. Your Results will update with the number of queries matching your search criteria. If the query is

greyed out, you cannot use it in a Kurve Report. Only queries with Type “Query” or “Report” can be pulled into Kurve.

Cancel Back a step

Select a query

☐ Select Record Type ☒ Select Data Source ☐ Create Query Filters ☐ Name Graph/Report

Rows per page: 10 1-2 of 2 < >

QUERY TITLE	QUERY NAME	MODULE	BO	TAGS	TYPE
Contains	Work Tasks	Contains	Contains	Kurve	
All Corrective Work Tasks with Request Class	cstWorkTask - All Corrective Work Tasks with Request Class - Kurve Starter	triTask	triWorkTask	Kurve Starter Queries	Query
All Preventive Work Tasks with Request Class	cstWorkTask - All Preventive Work Tasks with Request Class - Kurve Starter	triTask	triWorkTask	Kurve Starter Queries	Query

- e. Scroll through the list (scroll bar on the right-hand side of the table) and click on the query you would like to use to make a graph;

Cancel Back a step

Select a query

☐ Select Record Type ☒ Select Data Source ☐ Create Query Filters ☐ Name Graph/Report

Rows per page: 10 1-2 of 2 < >

QUERY TITLE	QUERY NAME	MODULE	BO	TAGS	TYPE
Contains	Work Tasks	Contains	Contains	Kurve	
All Corrective Work Tasks with Request Class	cstWorkTask - All Corrective Work Tasks with Request Class - Kurve Starter	triTask	triWorkTask	Kurve Starter Queries	Query
All Preventive Work Tasks with Request Class	cstWorkTask - All Preventive Work Tasks with Request Class - Kurve Starter	triTask	triWorkTask	Kurve Starter Queries	Query

3. Create Query Filters

With Kurve Query Filters you can create an apply filters before loading your report. This will help to improve load times and see only the data that is relevant to you.

- a. A new screen will open allowing you to create up to 12 query filters on your report. You can either create them here, or skip to continue to your report.

Cancel

Back a step Skip

Create query filters

☒ Select Record Type ☐ Select Data Source ☒ Create Query Filters ☐ Name Graph/Report

Only columns from the Primary Business Object can be selected for Query Filters. Some columns on the query may not be available.

Filter Created: 0/12

CREATE FILTER

FILTER 2 FILTER 3 FILTER 4 FILTER 5 FILTER 6

FILTER 7 FILTER 8 FILTER 9 FILTER 10 FILTER 11 FILTER 12

b. Create a new filter by clicking on the first open box “Create Filter”

Cancel

Create query filters

☒ Select Record Type ☐ Select Data Source ☒ Create

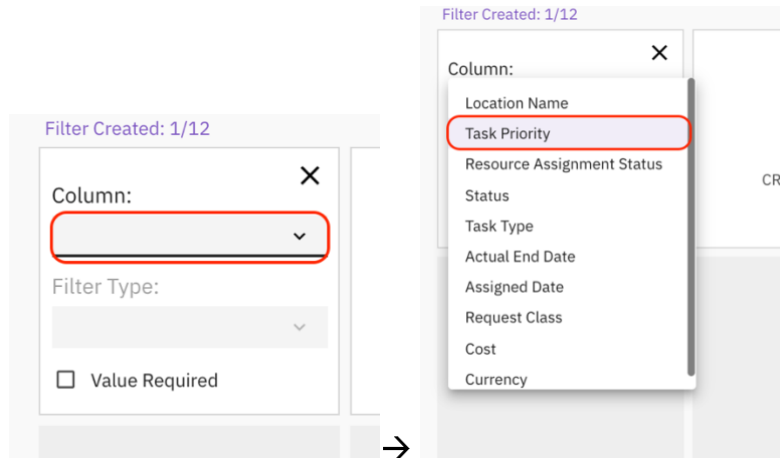
Only columns from the Primary Business Object can be selected for Query Filters. Some columns on t

Filter Created: 0/12

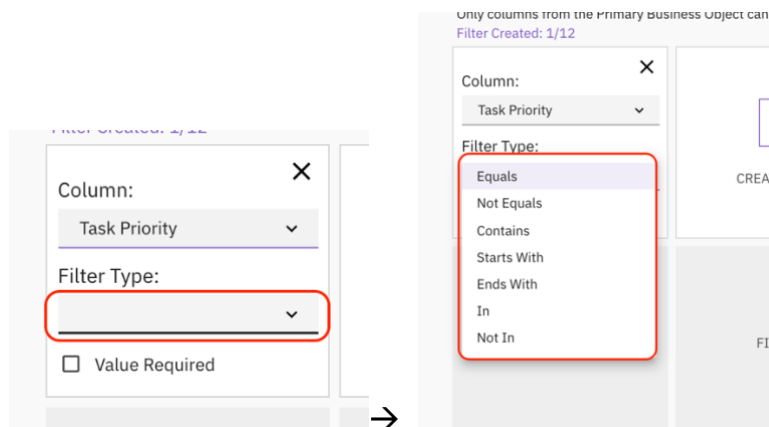
CREATE FILTER

FILTER 2 FILTER 3

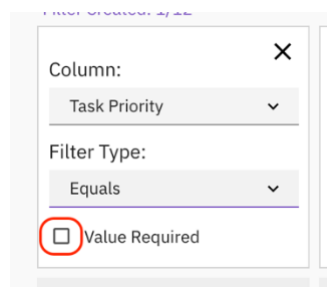
c. Next, select the column from the query that you would like to have a filter



d. Now, select the filter type:



e. Select whether the filter will be required or not upon loading the report by selecting the check box next to "Value Required". By making the filter required, the user will not be able to load the report unless they provide a value.



f. You can continue making more filters using the same process. Once done creating them, click Continue.

This screenshot shows the 'Create query filters' step of the report creation process. At the top, there are buttons for 'Cancel', 'Back a step', and 'Continue' (highlighted with a red border). Below the buttons is a progress bar with four steps: 'Select Record Type', 'Select Data Source', 'Create Query Filters' (the current step), and 'Name Graph/Report'. A note states: 'Only columns from the Primary Business Object can be selected for Query Filters. Some columns on the query may not be available. Filter Created: 2/12'. The main area contains two filter configuration panels. The first panel shows 'Column: Task Priority', 'Filter Type: Equals', and a checked 'Value Required' checkbox. The second panel shows 'Column: Cost', 'Filter Type: More Than', and an unchecked 'Value Required' checkbox. To the right of these panels is a 'CREATE FILTER' button with a plus icon. Below these elements is a grid of 12 filter slots, labeled FILTER 4 through FILTER 12. FILTER 9 is currently empty, while the others contain placeholder text.

4. Naming the Report

- Once a query is selected, a new page will open. Click on “Name Report” and type in the name of the report you would like to create.

Note: Once the name of the report is typed into the space, the “Create Report” button will be enabled and will turn purple.

This screenshot shows the 'Name Report' step. At the top, there are buttons for 'Cancel', 'Back a step', and 'Create Report' (disabled). The progress bar shows the current step is 'Name Graph/Report'. A note says: 'Review your selections and name your report'. Below this, the following information is displayed: 'Record Type: Report', 'Data Source: cstWorkTask - All Preventive Work Tasks with Request Class - Kurve Starter', and 'Query Filters: [Column: Task Priority, Filter Type: Equals] [Column: Cost, Filter Type: More Than]'. At the bottom, there is a text input field labeled 'Report Name' which is currently empty and highlighted with a red border.

5. Click “Create Report.”

This screenshot shows the 'Name Report' step with the report name entered. The 'Create Report' button is now enabled and highlighted with a red border. The text input field for 'Report Name' now contains the text 'All Preventive Work Tasks'.

6. Enter Query Filter value(s)

If you have created query filters, you can now enter the values you would like the report to load.

- a. Required Filters: you will be required to input a value before you can load your report. In the case below, Task Priority is required (as indicated by the red Required mark beside the field name), therefore, the “Apply” field is greyed out.

Enter Query Filter value(s)
Values are case-sensitive

Task Priority (Required)
Equals

Cost
More Than

Cancel Apply

- b. Enter a value in the box, and then click Apply. Query filters act as And filters. Therefore, in our example below, if we inputted a value into cost as well, it would load results that satisfy both conditions.

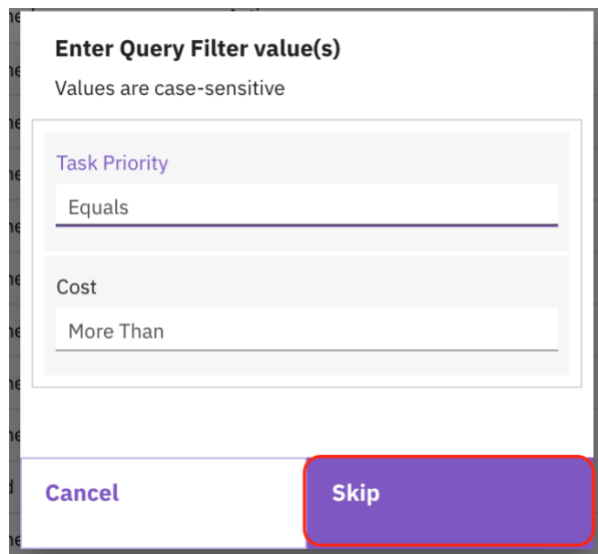
Enter Query Filter value(s)
Values are case-sensitive

Task Priority (Required)
Equals Medium

Cost
More Than

Cancel Apply

- c. Non-required query filters: for filters that you have not checked the Required box for, you have the option to enter a value or skip it to load all results.



Enter Query Filter value(s)
Values are case-sensitive

Task Priority
Equals

Cost
More Than

Cancel Skip

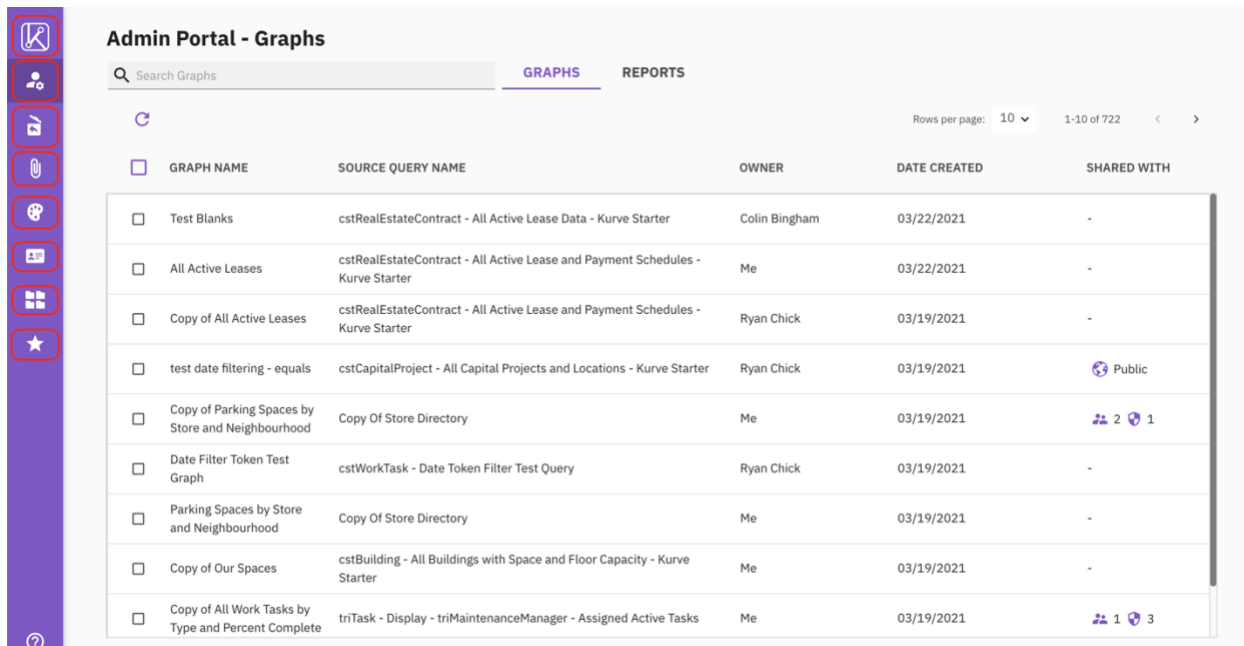
7. Personalizing / Re-organizing the Columns on the Report

- The created report will now open in a page where you can personalize and reorganize the report.

Note: Please refer to the Reports Portal, *Section 3 to 6*.

Admin Portal

1. Getting to know the Kurve Admin Dashboard












Admin Portal - Graphs

Search Graphs **GRAPHS** **REPORTS**

Rows per page: 10 1-10 of 722

GRAPH NAME	SOURCE QUERY NAME	OWNER	DATE CREATED	SHARED WITH
<input type="checkbox"/> Test Blanks	cstRealEstateContract - All Active Lease Data - Kurve Starter	Colin Bingham	03/22/2021	-
<input type="checkbox"/> All Active Leases	cstRealEstateContract - All Active Lease and Payment Schedules - Kurve Starter	Me	03/22/2021	-
<input type="checkbox"/> Copy of All Active Leases	cstRealEstateContract - All Active Lease and Payment Schedules - Kurve Starter	Ryan Chick	03/19/2021	-
<input type="checkbox"/> test date filtering - equals	cstCapitalProject - All Capital Projects and Locations - Kurve Starter	Ryan Chick	03/19/2021	Public
<input type="checkbox"/> Copy of Parking Spaces by Store and Neighbourhood	Copy Of Store Directory	Me	03/19/2021	2 1
<input type="checkbox"/> Date Filter Token Test Graph	cstWorkTask - Date Token Filter Test Query	Ryan Chick	03/19/2021	-
<input type="checkbox"/> Parking Spaces by Store and Neighbourhood	Copy Of Store Directory	Me	03/19/2021	-
<input type="checkbox"/> Copy of Our Spaces	cstBuilding - All Buildings with Space and Floor Capacity - Kurve Starter	Me	03/19/2021	-
<input type="checkbox"/> Copy of All Work Tasks by Type and Percent Complete	triTask - Display - triMaintenanceManager - Assigned Active Tasks	Me	03/19/2021	1 3

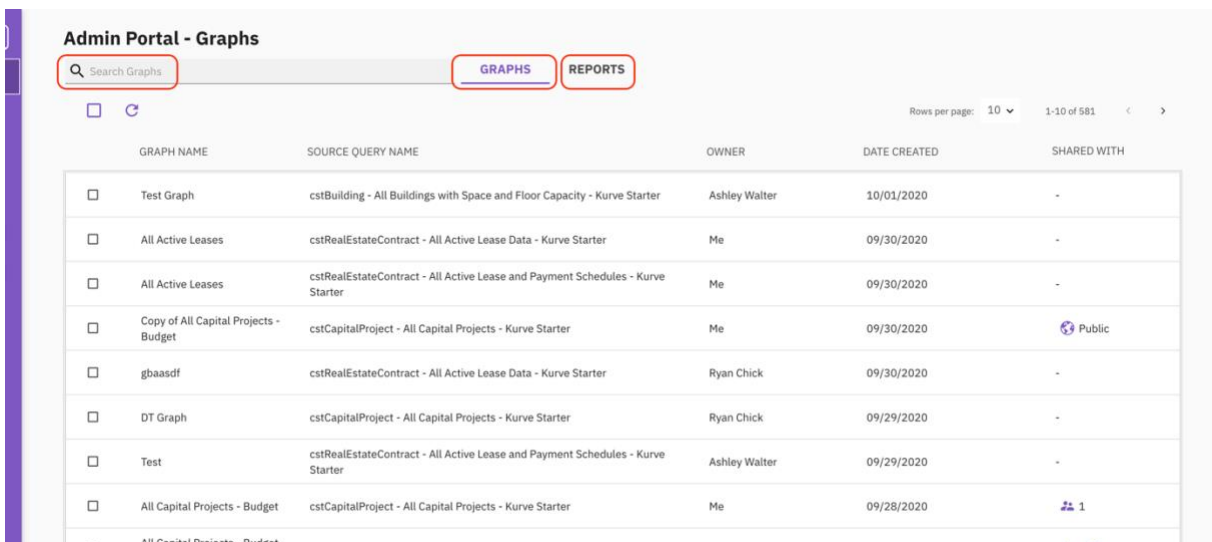
	Kurve Dashboard	Click here to return to the Kurve dashboard.
	Admin Portal	Click here to see all graphs and reports with no restrictions. You can reassign graphs/reports to different users, change the share settings, delete, copy or get the portal URL.
	Restore/Permanent Delete Graphs and Reports	Click here to view all deleted graphs and reports by all users. You can easily restore them in this view or permanently delete records from Kurve.
	Reattach Graphs to Reports	Legacy tools for versions pre 1.7.0.
	Manage Color Templates for Kurve Users	Click here to add, delete, modify, or copy color templates for all Kurve users.
	Generate IDs	Legacy tool for generating IDs pre 1.7.0.
	Find Duplicates	Easily find and delete records that have duplicate IDs post om-ing.
	Manage Users Favorites	Click here to manage your users favorites, including setting and deleting favourites on behalf of any user.

	Help	Click here to easily access resources for Kurve.
-----------------------------------------------------------------------------------	------	--------------------------------------------------

2. Admin Portal

The admin portal hosts all graphs and reports created by Kurve users in your company. You will have complete control of all graphs and reports in this portal.

- Search** for graph/report.
- To search for a Kurve creation, select whether you would like to search for a graph or report by clicking either Graph or Report along the top. To search, click into the Search icon and start typing. Your results will update as you search. Note: You can search by the graph/report name, query name, or the owner.

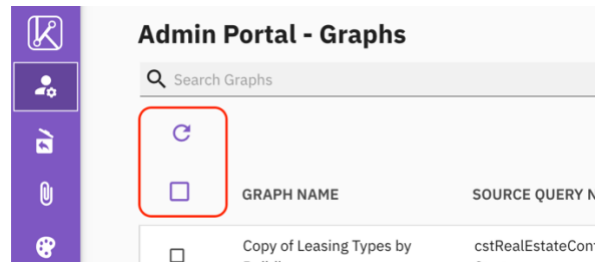


Search Graphs		GRAPHS	REPORTS	Rows per page: 10 1-10 of 581	
GRAPH NAME	SOURCE QUERY NAME	OWNER	DATE CREATED	SHARED WITH	
<input type="checkbox"/> Test Graph	cstBuilding - All Buildings with Space and Floor Capacity - Kurve Starter	Ashley Walter	10/01/2020	-	
<input type="checkbox"/> All Active Leases	cstRealEstateContract - All Active Lease Data - Kurve Starter	Me	09/30/2020	-	
<input type="checkbox"/> All Active Leases	cstRealEstateContract - All Active Lease and Payment Schedules - Kurve Starter	Me	09/30/2020	-	
<input type="checkbox"/> Copy of All Capital Projects - Budget	cstCapitalProject - All Capital Projects - Kurve Starter	Me	09/30/2020	Public	
<input type="checkbox"/> gbaasdf	cstRealEstateContract - All Active Lease Data - Kurve Starter	Ryan Chick	09/30/2020	-	
<input type="checkbox"/> DT Graph	cstCapitalProject - All Capital Projects - Kurve Starter	Ryan Chick	09/29/2020	-	
<input type="checkbox"/> Test	cstRealEstateContract - All Active Lease and Payment Schedules - Kurve Starter	Ashley Walter	09/29/2020	-	
<input type="checkbox"/> All Capital Projects - Budget	cstCapitalProject - All Capital Projects - Kurve Starter	Me	09/28/2020	1	
<input type="checkbox"/> All Capital Projects - Budget					

3. Using Graph Actions

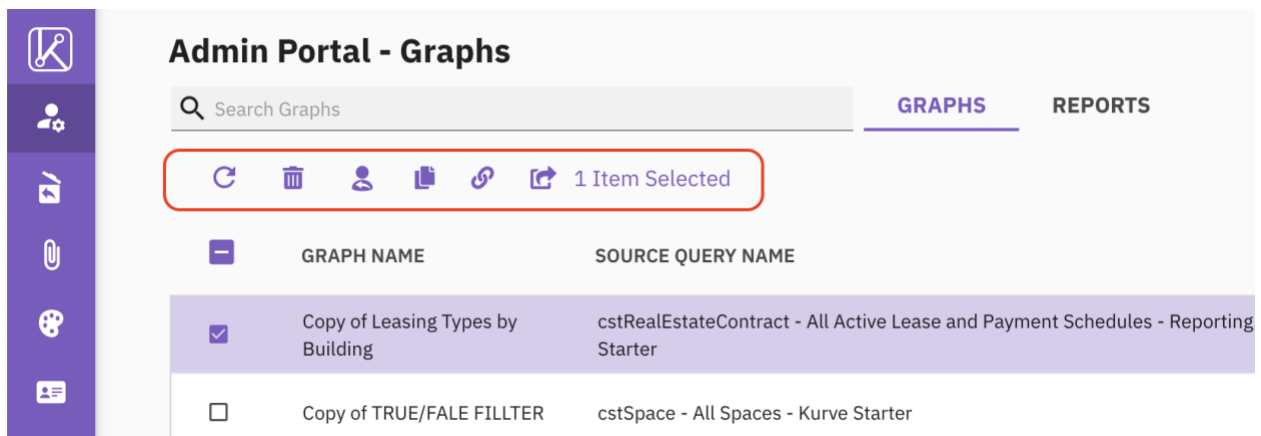
As an admin, you have unrestricted access to graphs and reports. Note: Each feature listed below for the Admin Portal will function the same way as described under the Graphs Portal Section 2.

- No rows selected:



	Select All	Select all graphs on the page.
	Refresh	Refresh the page.

ii. One row selected:




	Select	Unselect the graph/report(s) that are currently selected.
	Refresh	Refresh the page.
	Delete	Delete the selected graph/report(s).
	Reassign	Change the owner of any report or graph – see below

iii. Two or more selected: the options differ but function the same as above.

The screenshot shows the 'Admin Portal - Graphs' interface. On the left is a purple sidebar with icons for navigation. The main area has a search bar labeled 'Search Graphs' and a 'GRAPHS' tab. Below the search bar, a toolbar contains icons for refresh, delete, and user selection, followed by the text '2 Items Selected'. A table below lists three graphs. The first two rows are highlighted in light purple, indicating they are selected. The first row is 'Copy of Leasing Types by Building' with source query 'cstRealEstateContract - All Active Lease and Payr Starter'. The second row is 'Copy of TRUE/FALE FILLTER' with source query 'cstSpace - All Spaces - Kurve Starter'. The third row is 'Leasing Types by Building' with source query 'cstRealEstateContract - All Active Lease and Payr Starter' and is not selected.

	GRAPH NAME	SOURCE QUERY NAME
<input checked="" type="checkbox"/>	Copy of Leasing Types by Building	cstRealEstateContract - All Active Lease and Payr Starter
<input checked="" type="checkbox"/>	Copy of TRUE/FALE FILLTER	cstSpace - All Spaces - Kurve Starter
<input type="checkbox"/>	Leasing Types by Building	cstRealEstateContract - All Active Lease and Payr Starter

4. Delete Records:

As an admin you have the ability to delete records on behalf of other users. Once a row is selected a delete icon () will appear along the top. Click it to delete it for the user.

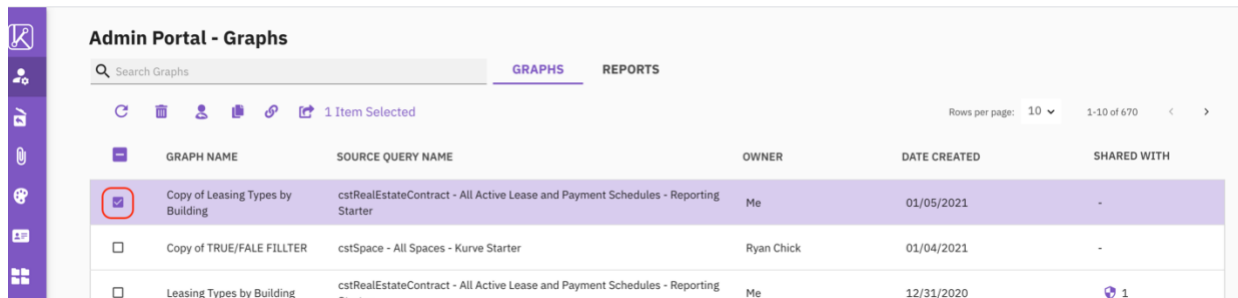
This screenshot shows the 'Admin Portal - Graphs' interface with the '1 Item Selected' state. The toolbar now includes a delete icon (trash) which is highlighted with a red box. A tooltip 'Delete Selected' is visible over the delete icon. The table below shows two rows. The first row, 'Copy of Leasing Types by Building', is selected and highlighted in light purple. The second row, 'Copy of TRUE/FALE FILLTER', is not selected.

	GRAPH NAME	SOURCE QUERY NAME
<input checked="" type="checkbox"/>	Copy of Leasing Types by Building	cstRealEstateContract - All Active Lease and Payr Starter
<input type="checkbox"/>	Copy of TRUE/FALE FILLTER	cstSpace - All Spaces - Kurve Starter

5. Re-assign Records:

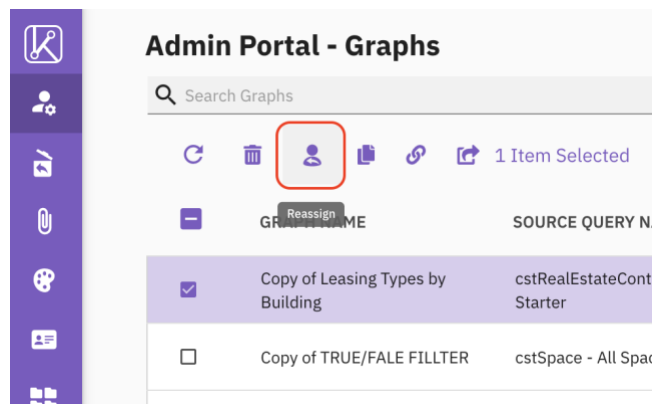
Kurve Admins can change the owner of any report or graph (functionality works the same for both).

- c. Select the record(s) you would like to re-assign by checking the box on the left of the row. You can select one or multiple records to re-assign.

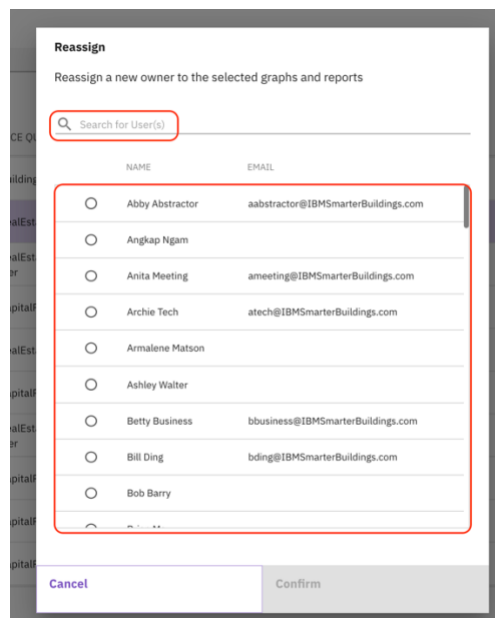


GRAPH NAME	SOURCE QUERY NAME	OWNER	DATE CREATED	SHARED WITH
<input checked="" type="checkbox"/> Copy of Leasing Types by Building	cstRealEstateContract - All Active Lease and Payment Schedules - Reporting Starter	Me	01/05/2021	-
<input type="checkbox"/> Copy of TRUE/FALE FILLTER	cstSpace - All Spaces - Kurve Starter	Ryan Chick	01/04/2021	-
<input type="checkbox"/> Leasing Types by Building	cstRealEstateContract - All Active Lease and Payment Schedules - Reporting Starter	Me	12/31/2020	1

d. Click on the reassign icon



e. A pop-up will appear. Search or scroll to find the user you would like to re-assign the record to.

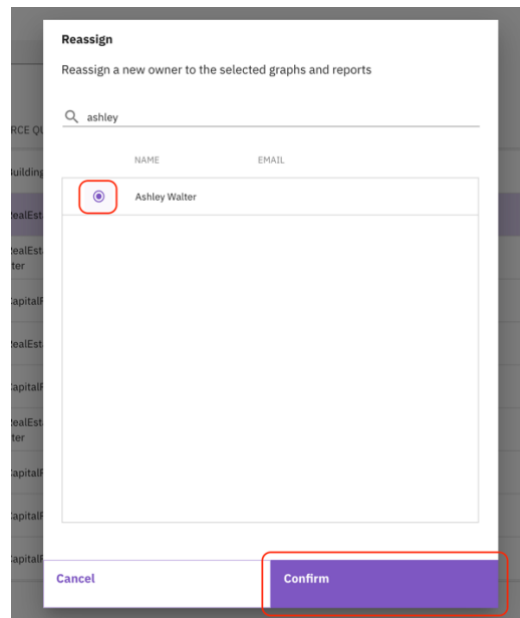


Reassign

Reassign a new owner to the selected graphs and reports

NAME	EMAIL
<input type="radio"/> Abby Abstractor	aabstractor@IBMSmarterBuildings.com
<input type="radio"/> Angkap Ngam	
<input type="radio"/> Anita Meeting	ameeting@IBMSmarterBuildings.com
<input type="radio"/> Archie Tech	atech@IBMSmarterBuildings.com
<input type="radio"/> Armalene Matson	
<input type="radio"/> Ashley Walter	
<input type="radio"/> Betty Business	bbusiness@IBMSmarterBuildings.com
<input type="radio"/> Bill Ding	bding@IBMSmarterBuildings.com
<input type="radio"/> Bob Barry	

- f. Select the circle beside the user you are re-assigning the record to and then click Confirm



- g. The owner of the record will update accordingly.

Admin Portal - Graphs

Search Graphs

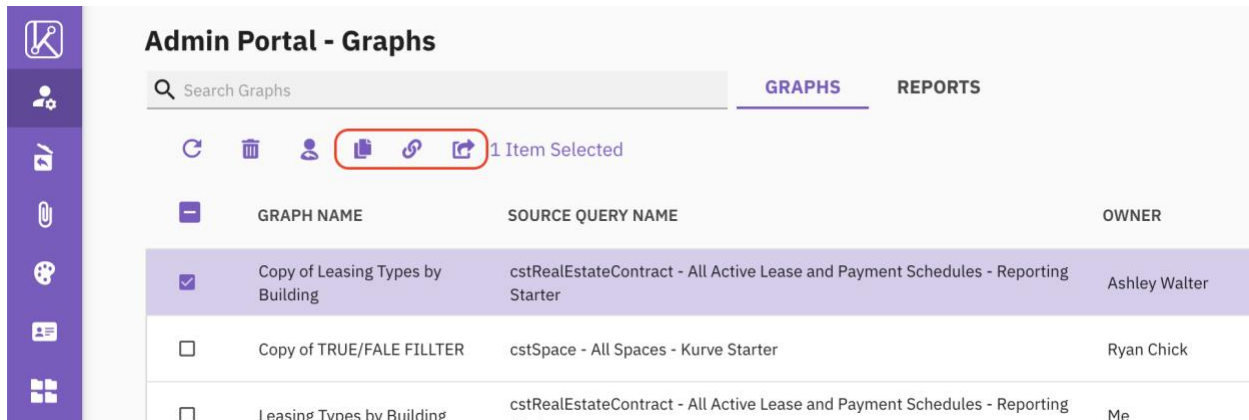
GRAPHS REPORTS

1 Item Selected

Rows per page: 10 1-10 of 670

	GRAPH NAME	SOURCE QUERY NAME	OWNER	DATE CREATED	SHARED WITH
<input checked="" type="checkbox"/>	Copy of Leasing Types by Building	cstRealEstateContract - All Active Lease and Payment Schedules - Reporting Starter	Ashley Walter	01/05/2021	-
<input type="checkbox"/>	Copy of TRUE/FALE FILLTER	cstSpace - All Spaces - Kurve Starter	Ryan Chick	01/04/2021	-
<input type="checkbox"/>	Leasing Tyoes by Building	cstRealEstateContract - All Active Lease and Payment Schedules - Reporting	Me	12/31/2020	1

6. Copy, Get Portal URL, Share






Admin Portal - Graphs

Search Graphs

GRAPHS REPORTS


1 Item Selected

	GRAPH NAME	SOURCE QUERY NAME	OWNER
<input checked="" type="checkbox"/>	Copy of Leasing Types by Building	cstRealEstateContract - All Active Lease and Payment Schedules - Reporting Starter	Ashley Walter
<input type="checkbox"/>	Copy of TRUE/FALE FILTER	cstSpace - All Spaces - Kurve Starter	Ryan Chick
<input type="checkbox"/>	Leasing Types by Building	cstRealEstateContract - All Active Lease and Payment Schedules - Reporting Starter	Me

	Copy Graph	Copy an existing graph.
	Get Portal/Form URL	Get a portal URL or form URL to embed the graph into a portal section or form tab.
	Change Shared Settings	Make changes to whom the graph is shared with (public, private, or specific individuals).

7. Restore Deleted Graphs and Reports

Admins have the ability to restore deleted records for other users. They can also permanently delete records from the system.

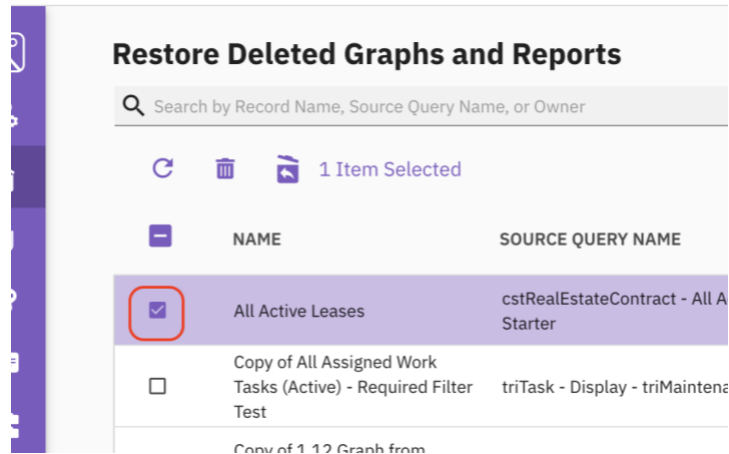
- Navigate to this page by clicking on the bin icon ()



Restore Deleted Graphs and Reports					
<input type="text"/> Search by Record Name, Source Query Name, or Owner					
<div> <div>↺</div> <div>Rows per page: 10</div> <div>1-10 of 649</div> <div>↻</div> </div>					
<input type="checkbox"/>	NAME	SOURCE QUERY NAME	OWNER	DATE CREATED	TYPE
<input type="checkbox"/>	Test Blanks 2	cstRealEstateContract - All Active Lease Data - Kurve Starter	Colin Bingham	03/22/2021	Graph
<input type="checkbox"/>	Test Blanks	cstRealEstateContract - All Active Lease Data - Kurve Starter	Colin Bingham	03/17/2021	Graph
<input type="checkbox"/>	1.13 Test Report [AW]	cstCapitalProject - All Capital Projects and Locations - Kurve Starter	Ashley Walter	03/16/2021	Report
<input type="checkbox"/>	1.13 Test Report AW	cstSpaceClassCurrent - All Space Classes - Kurve Starter	Ashley Walter	03/16/2021	Report
<input type="checkbox"/>	Copy of G&A PO by Vendor - Per Project - Line Items	cstPurchaseOrder - Kurve - PO by Vendor - Per Project - Line Items	Ryan Chick	03/15/2021	Report
<input type="checkbox"/>	Copy of G&A PO by Vendor - Per Project - Line Items	cstPurchaseOrder - Kurve - PO by Vendor - Per Project - Line Items	Ryan Chick	03/15/2021	Report
<input type="checkbox"/>	Copy of G&A PO by Vendor - Per Project - Line Items	cstPurchaseOrder - Kurve - PO by Vendor - Per Project - Line Items	Ryan Chick	03/15/2021	Report
<input type="checkbox"/>	Copy of G&A PO by Vendor - Per Project - Line Items	cstPurchaseOrder - Kurve - PO by Vendor - Per Project - Line Items	Ryan Chick	03/15/2021	Report
<input type="checkbox"/>	Copy of G&A PO by Vendor - Per Project - Line Items	cstPurchaseOrder - Kurve - PO by Vendor - Per Project - Line Items	Ryan Chick	03/15/2021	Report

- b. To restore/delete a graph or report, search for the record or find the record in the list

Restore Deleted Graphs and Reports					
<input type="text"/> Search by Record Name, Source Query Name, or Owner					
<div> <div>↺</div> <div>Rows per page: 10</div> <div>1-10 of 649</div> <div>↻</div> </div>					
<input type="checkbox"/>	NAME	SOURCE QUERY NAME	OWNER	DATE CREATED	TYPE
<input type="checkbox"/>	Test Blanks 2	cstRealEstateContract - All Active Lease Data - Kurve Starter	Colin Bingham	03/22/2021	Graph
<input type="checkbox"/>	Test Blanks	cstRealEstateContract - All Active Lease Data - Kurve Starter	Colin Bingham	03/17/2021	Graph
<input type="checkbox"/>	1.13 Test Report [AW]	cstCapitalProject - All Capital Projects and Locations - Kurve Starter	Ashley Walter	03/16/2021	Report
<input type="checkbox"/>	1.13 Test Report AW	cstSpaceClassCurrent - All Space Classes - Kurve Starter	Ashley Walter	03/16/2021	Report
<input type="checkbox"/>	Copy of G&A PO by Vendor - Per Project - Line Items	cstPurchaseOrder - Kurve - PO by Vendor - Per Project - Line Items	Ryan Chick	03/15/2021	Report
<input type="checkbox"/>	Copy of G&A PO by Vendor - Per Project - Line Items	cstPurchaseOrder - Kurve - PO by Vendor - Per Project - Line Items	Ryan Chick	03/15/2021	Report
<input type="checkbox"/>	Copy of G&A PO by Vendor - Per Project - Line Items	cstPurchaseOrder - Kurve - PO by Vendor - Per Project - Line Items	Ryan Chick	03/15/2021	Report
<input type="checkbox"/>	Copy of G&A PO by Vendor - Per Project - Line Items	cstPurchaseOrder - Kurve - PO by Vendor - Per Project - Line Items	Ryan Chick	03/15/2021	Report
<input type="checkbox"/>	Copy of G&A PO by Vendor - Per Project - Line Items	cstPurchaseOrder - Kurve - PO by Vendor - Per Project - Line Items	Ryan Chick	03/15/2021	Report

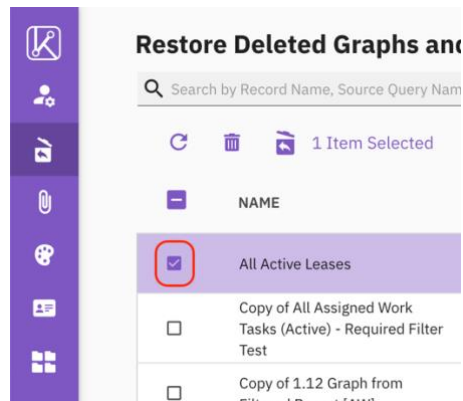
- c. Select the record you would like to restore/permanently delete by clicking the square icon of the row.



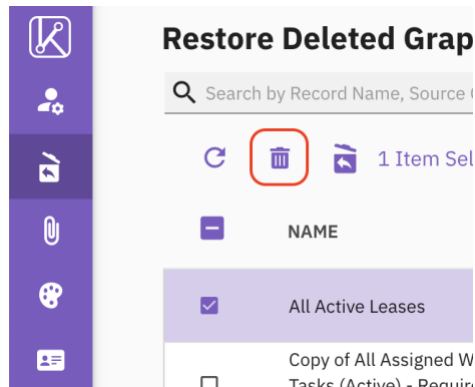
	Permanent Delete	By deleting on this page, the report or graph will be permanently deleted
	Restore Records	Restore records for any user

d. Permanently Delete Records:

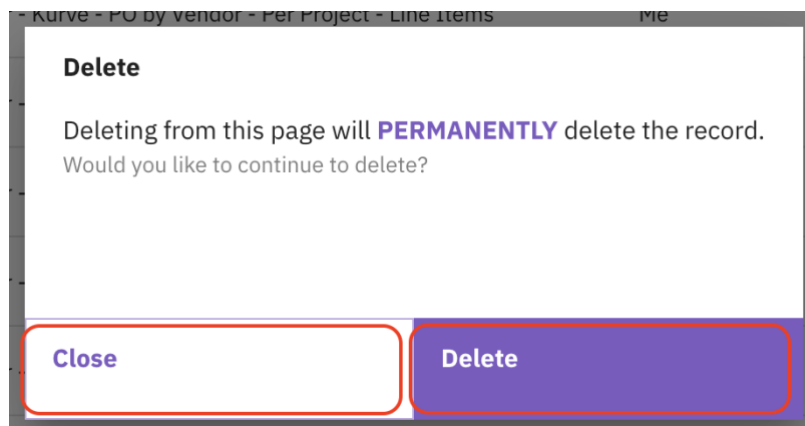
- i. Select the record(s) you would like to remove.



- i. Select the trash can icon at the top of the page




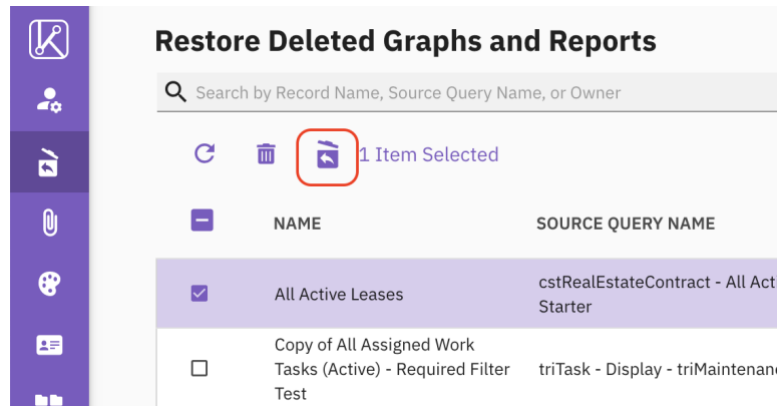
- ii. A pop up will appear warning you that the deletion will be **permanent**. If you would like to continue with deleting the record, click Delete. If you would like to keep the record in the restore page, click Close.



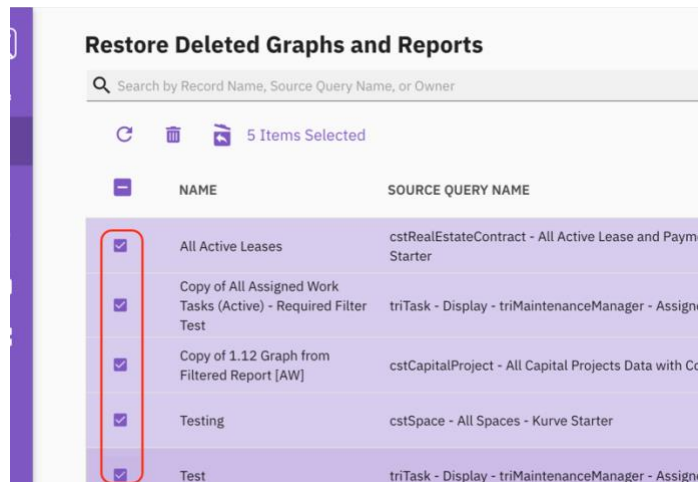
Note: If you delete a record from this page, the record cannot be restored.

e. **Restore Records:**

- iii. Click the box icon () at the top. The record will be immediately restore upon clicking the button.



- iv. Multi-select to restore multiple records at once



8. Reattach Graphs to Reports

This tool is only used for versions 1.6.0 and earlier. Please disregard if you are on Versions 1.7.0 or 1.8.0.

Upon migrating graphs made from reports between environments, the link between the graph and report will break. Instead of going through the process of recreating the graph, the admin can relink your graph to the respective report.

- a. Navigate to this portal section by clicking on the clip icon ()

Reattach Graph to Report
This page is a legacy tool, only needed for migrating records created before installing Kurve 1.7 or a later version.

Graph
Search ID, Graph Name, Report Name, or Owner


Report
Search ID, Report Name, or Owner

Graph is not linked to a Report

ID	GRAPH NAME	REPORT NAME	OWNER
<input type="checkbox"/> 14967873	Budget - Project Specific	My Capital Project Data	Lauren Rochon
<input type="checkbox"/> 15400354	Copy of Copy of Copy of test fil...	qsqw	Matthew Hyeun
<input type="checkbox"/> 15394886	testreportintograph	testreport	Matthew Hyeun
<input type="checkbox"/> 15391393	TK-765	Copy of 1E - Rep 1.8	Charlie Westaway
<input type="checkbox"/> 14775168	Edge - Old CP - Graph	Edge - Old Cp	Kurve Test 01
<input type="checkbox"/> 14771951	Copy of Copy of Copy of Copy of...	test share report	Daniel Wu
<input type="checkbox"/> 14771951	Copy of Copy of Copy of Copy of...	test share report	Daniel Wu
<input type="checkbox"/> 14771951	Copy of Copy of Copy of Copy of...	test share report	Daniel Wu
<input type="checkbox"/> 14771951	Copy of Copy of Copy of Copy of...	test share report	Daniel Wu
<input type="checkbox"/> 14771951	Copy of Copy of Copy of Copy of...	test share report	Daniel Wu
<input type="checkbox"/> 14771951	Copy of Copy of Copy of Copy of...	test share report	Daniel Wu
<input type="checkbox"/> 14771951	Copy of Copy of Copy of Copy of...	test share report	Daniel Wu

ID	REPORT NAME	OWNER
<input type="radio"/> 15457752	All Preventive Work Tasks	Lauren Rochon
<input type="radio"/> 15457656	Copy of OM Test ONE MORE TIMEEEEEEE	Colin Bingham
<input type="radio"/> 15457374	Capital Projects - Vendor Comparison	Lauren Rochon
<input type="radio"/> 15457363	PO by Vendor - Per Project - Line Items	Lauren Rochon
<input type="radio"/> 15457096	Copy of Copy of David's Test Report	Justin Lee
<input type="radio"/> 15457094	Copy of David's Test Report	Justin Lee
<input type="radio"/> 15457050	PO by Vendor - Per Project	Kurve Test 01
<input type="radio"/> 15457049	Test - Shared with OOB Person	Kurve Test 01
<input type="radio"/> 15457048	Copy of David's Test Report	Colin Bingham
<input type="radio"/> 15456974	David's Test Report	David Yew
<input type="radio"/> 15456969	AW Test this now!	Ashley Walter

Reattach

- b. In this view, the left side of the page shows all graphs in the system. The right side shows all reports in the system. The crossed-out clip () icon identifies graphs that are not linked to a report. In the image below, we can see here that all of these graphs are not linked to a report.

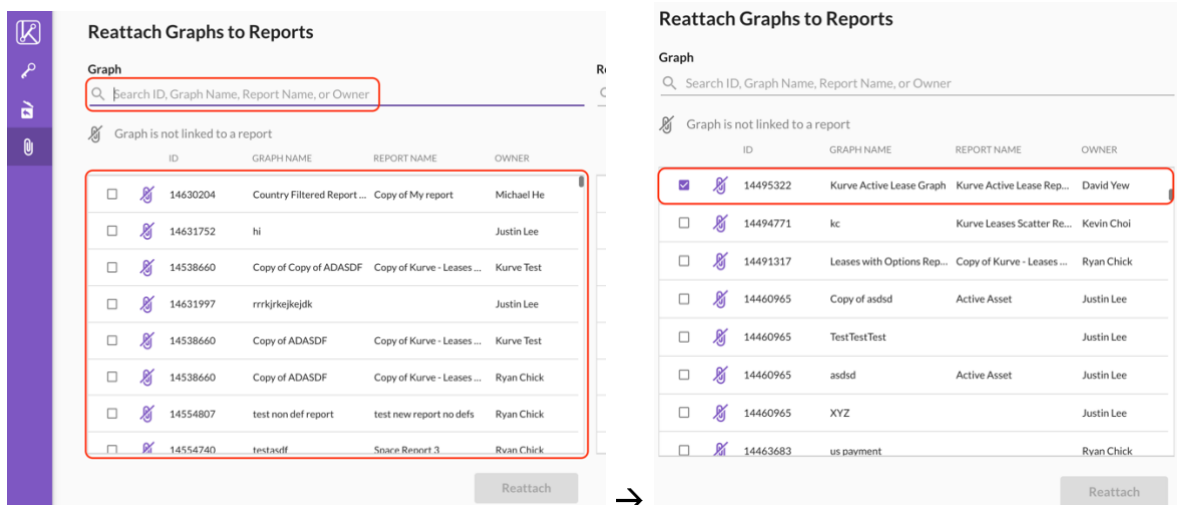
Reattach Graph to Report
This page is a legacy tool, only needed for migrating records created before installing

Graph
Search ID, Graph Name, Report Name, or Owner

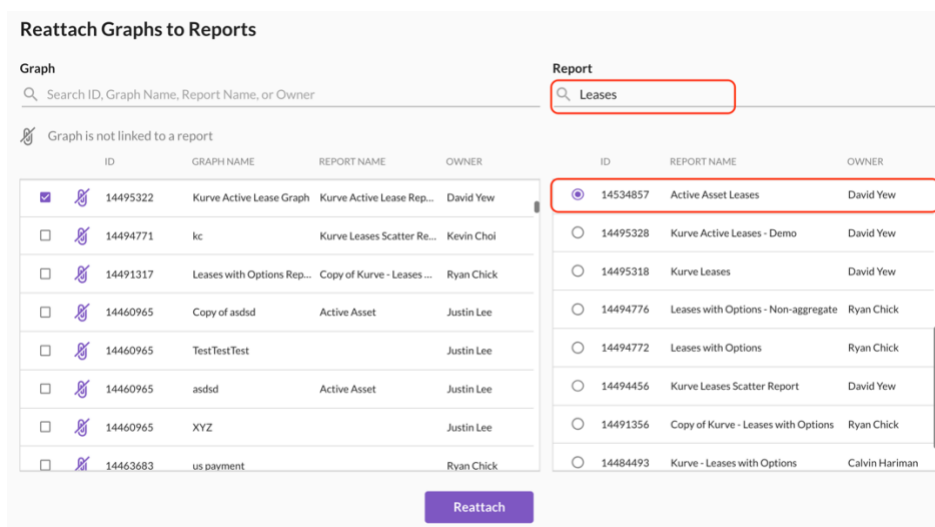
☒ Graph is not linked to a Report

ID	GRAPH NAME	REPORT NAME
<input type="checkbox"/> 14967873	Budget - Project Specific	My Capital F
<input type="checkbox"/> 15400354	Copy of Copy of Copy of test fil...	qsqw
<input type="checkbox"/> 15394886	testreportintograph	testreport
<input type="checkbox"/> 15391393	TK-765	Copy of 1E -
<input type="checkbox"/> 14775168	Edge - Old CP - Graph	Edge - Old C









- c. Select the graph you would like to relink by clicking the checkbox next to the record. You can find it by either searching for it or scrolling through the records



- d. Find the report you would like to relink the graph to. Select it by clicking the circle icon next to the report you would like to relink. You can find it by either searching for it or scrolling through the records.



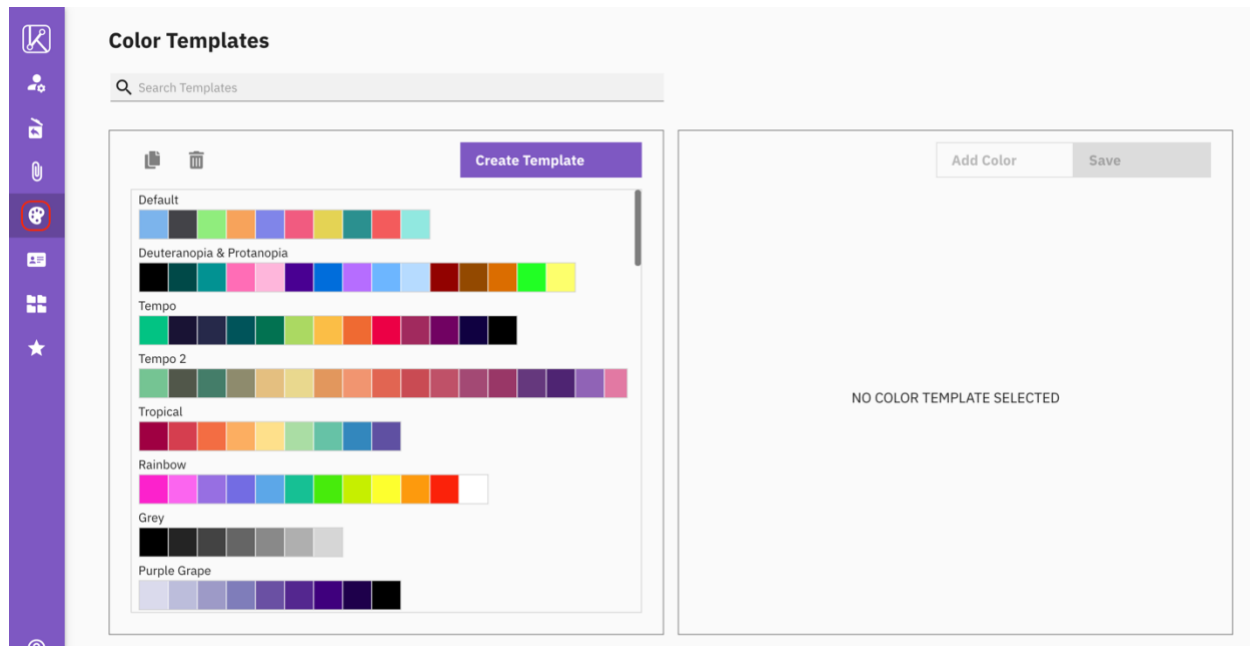
- e. Once you have selected the graph and the report, the Reattach icon at the bottom of the page will turn purple. Click Reattach. Upon selecting reattach they will be linked and the user will be able to load the graph in their Kurve dashboard.

<input checked="" type="checkbox"/>		14495322	Kurve Active Lease Graph	Kurve Active Lease Rep...	David Yew
<input type="checkbox"/>		14494771	kc	Kurve Leases Scatter Re...	Kevin Choi
<input type="checkbox"/>		14491317	Leases with Options Rep...	Copy of Kurve - Leases ...	Ryan Chick
<input type="checkbox"/>		14460965	Copy of asdsd	Active Asset	Justin Lee
<input type="checkbox"/>		14460965	TestTestTest		Justin Lee
<input type="checkbox"/>		14460965	asdsd	Active Asset	Justin Lee
<input type="checkbox"/>		14460965	XYZ		Justin Lee
<input type="checkbox"/>		14463683	us payment		Ryan Chick

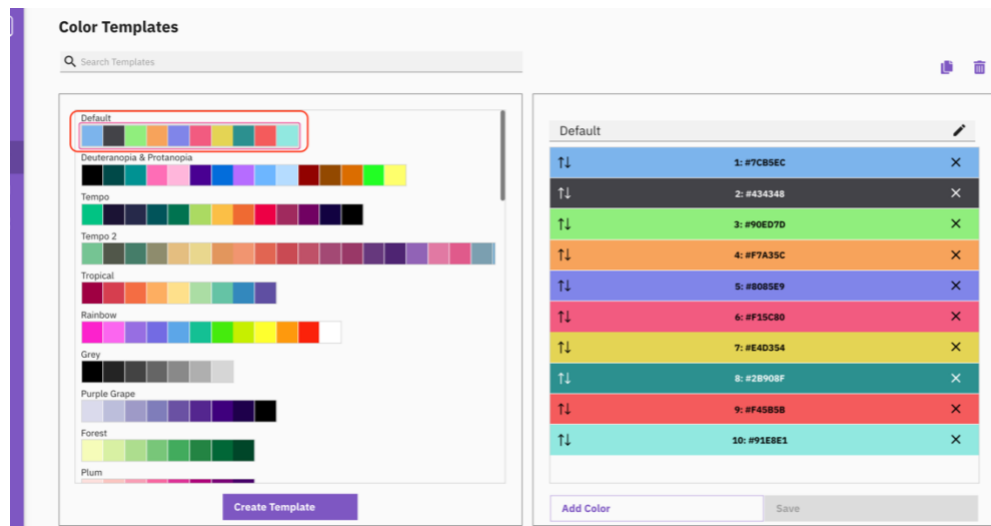
Reattach

<input checked="" type="radio"/>	14534857	Active Asset Leases	David Yew
<input type="radio"/>	14495328	Kurve Active Leases - Demo	David Yew
<input type="radio"/>	14495318	Kurve Leases	David Yew
<input type="radio"/>	14494776	Leases with Options - Non-aggregate	Ryan Chick
<input type="radio"/>	14494772	Leases with Options	Ryan Chick
<input type="radio"/>	14494456	Kurve Leases Scatter Report	David Yew
<input type="radio"/>	14491356	Copy of Kurve - Leases with Options	Ryan Chick
<input type="radio"/>	14484493	Kurve - Leases with Options	Calvin Hariman

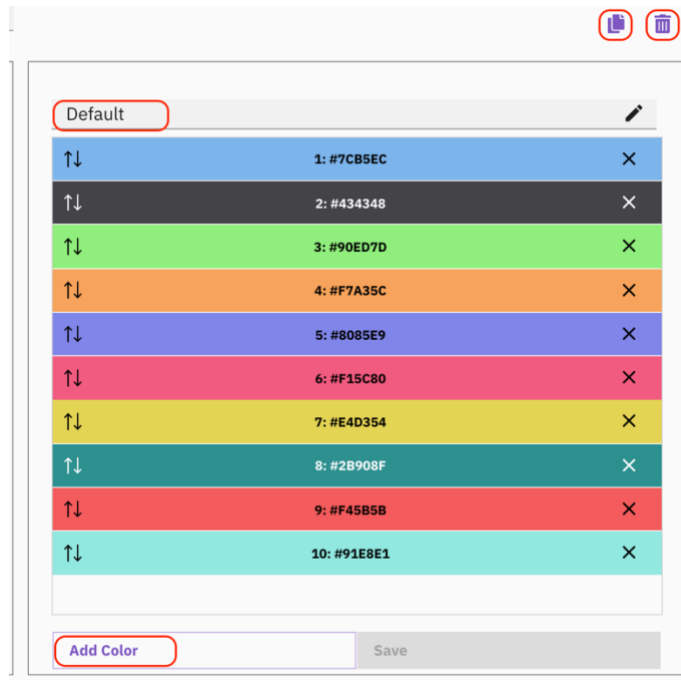
9. Manage Color Templates



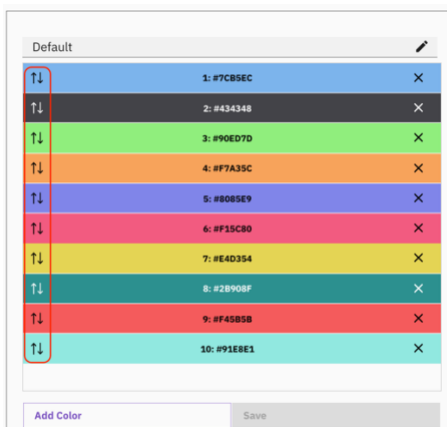
- a. To edit a color template, select it by clicking on any of the colors within the template.



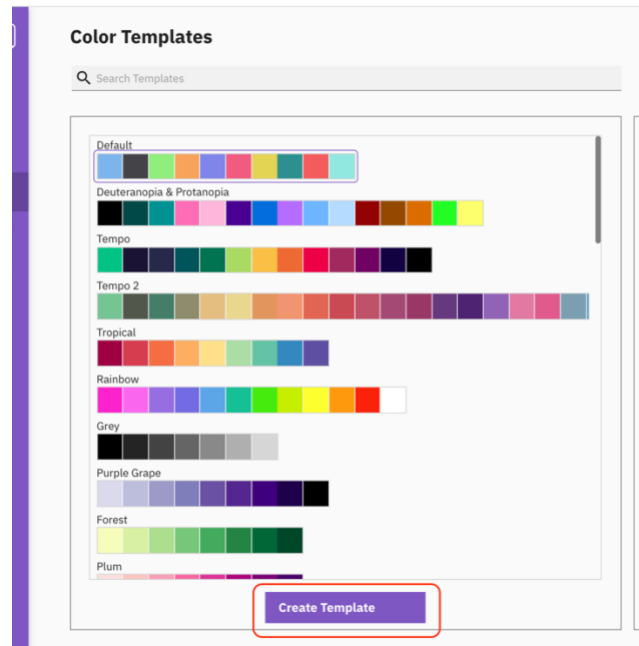
- b. Copy or delete the color template by clicking on the copy icon or trash can. Change the title of the color template by editing along the top. Or Add a new color by clicking the add color button.



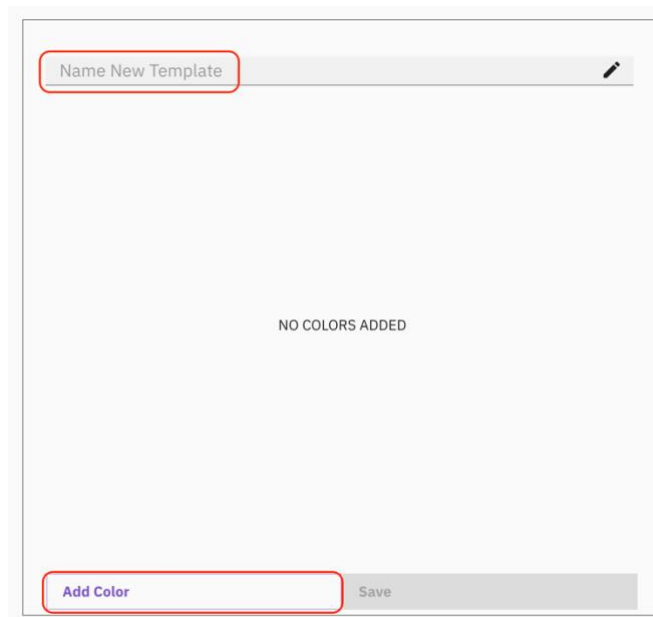
- c. You can re-arrange the colors, change existing colors or remove a color from any template. This works the same as customizing in the color settings of the graph. Any changes you make to a template can be saved by clicking on the Save button.



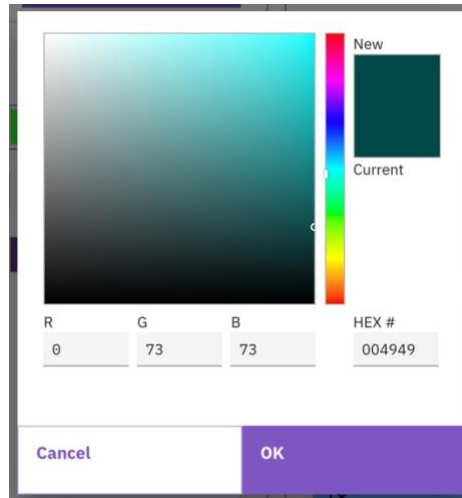
- d. To create a new template, click Create Template.



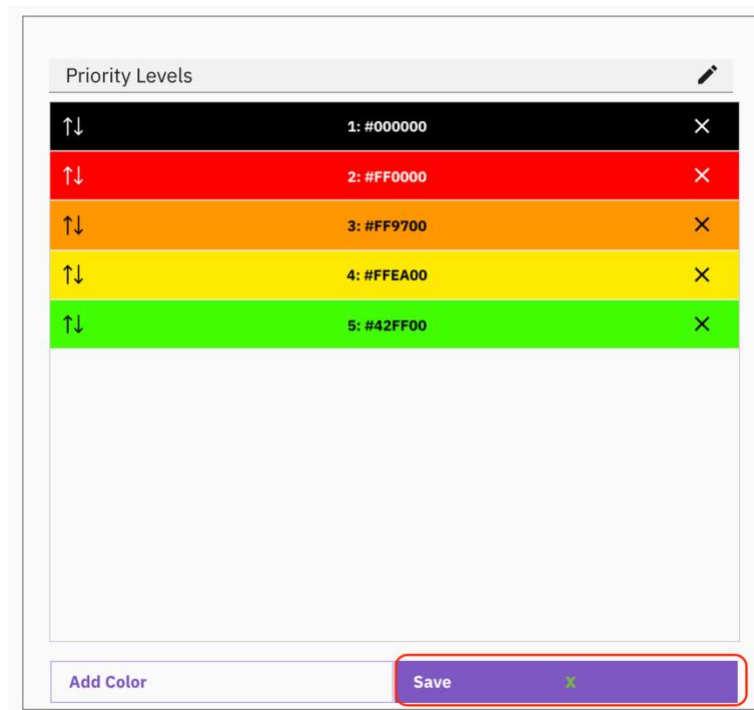
e. Name the template and then select your colors by clicking Add Color.



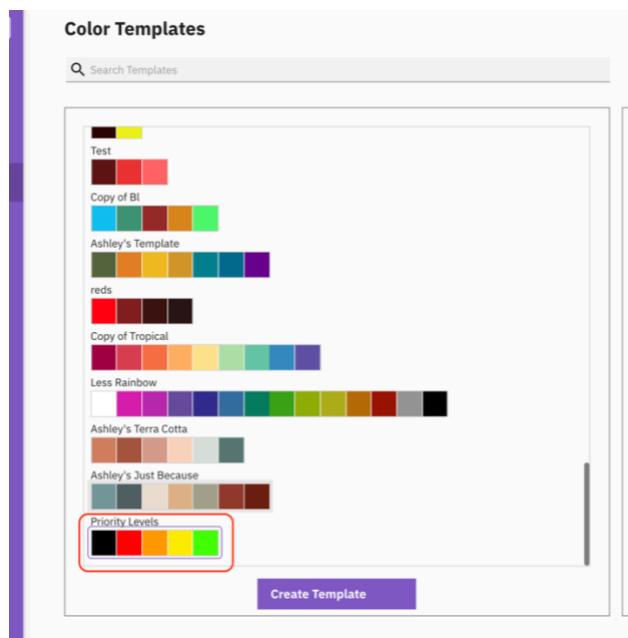
f. Select your colors using the color picker and click OK.



g. Once you've added all the colors you want, click Save.



h. Your new template will appear at the bottom of the list of templates



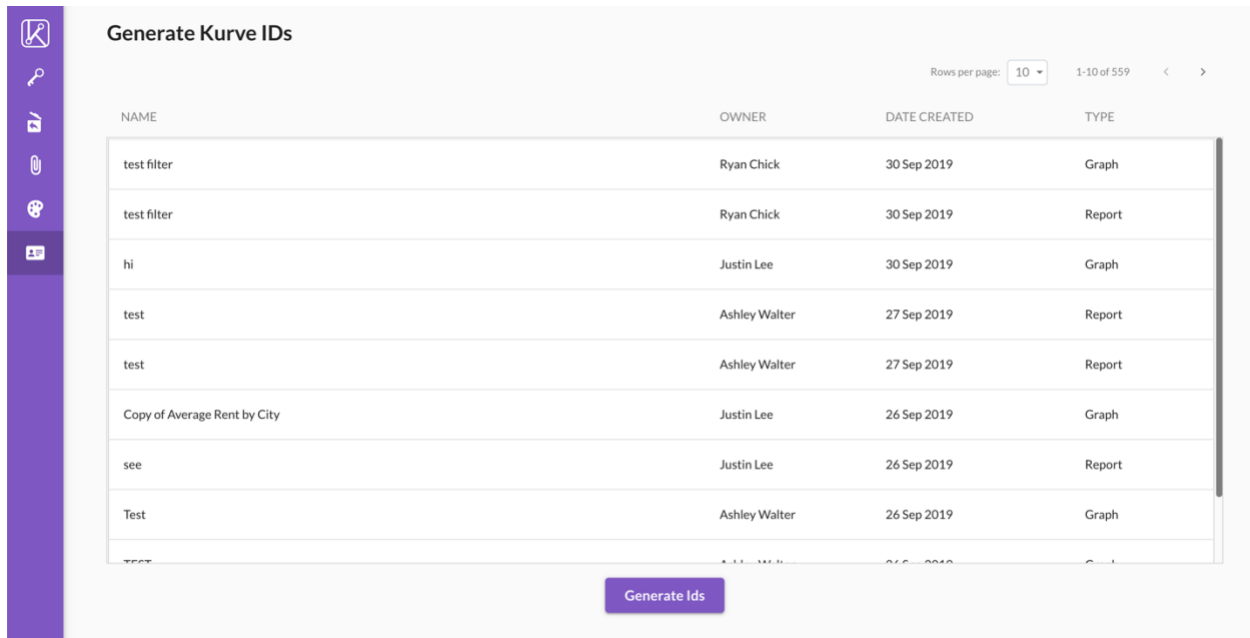
10. **Generate IDs**

This tool was made to make pre 1.7.0 versions of Kurve compatible with Version 1.7.0. If you are on Version 1.8.0 and later, please disregard.

This page should appear blank, if it isn't, please contact Support immediately.

In version 1.7.0 of Kurve Core, we changed the way Kurve graphs and reports are stored within TRIRIGA. This will ease the process of OMing between environments. In order to ensure all graphs and reports made in previous versions of Kurve are compatible with 1.7.0, the Kurve Admin must navigate to this page and generate IDs for all records in the system.

- a. Navigate to the Generate Kurve IDs portal on the Kurve Admin site.



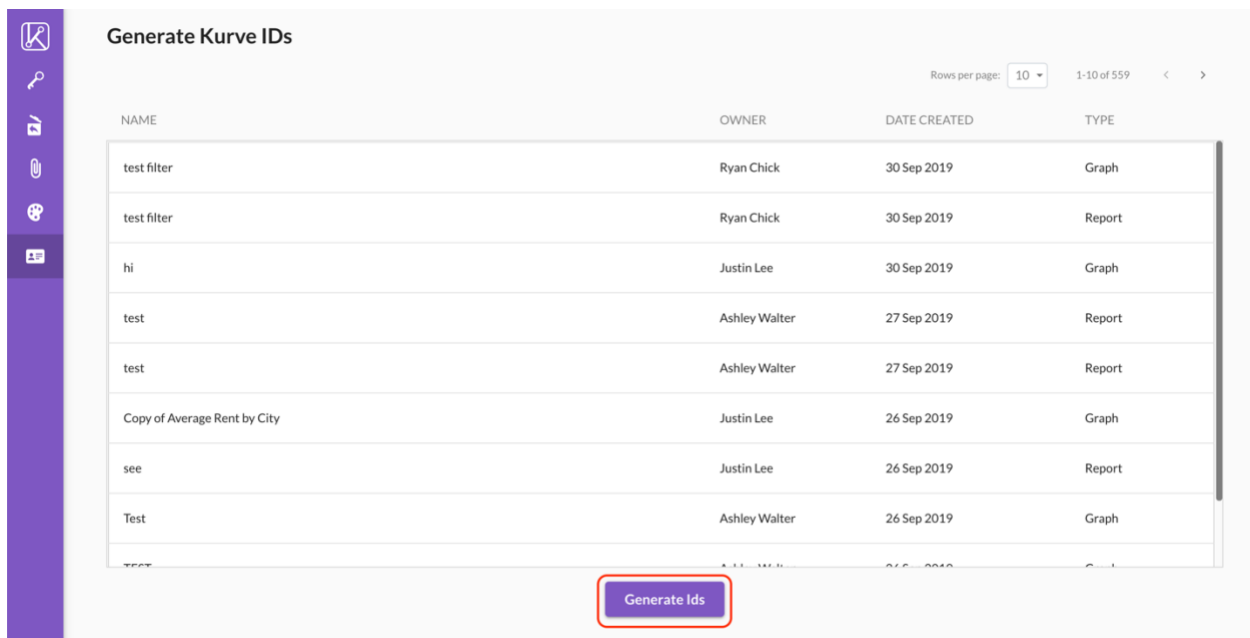
Generate Kurve IDs

Rows per page: 10 1-10 of 559 < >

NAME	OWNER	DATE CREATED	TYPE
test filter	Ryan Chick	30 Sep 2019	Graph
test filter	Ryan Chick	30 Sep 2019	Report
hi	Justin Lee	30 Sep 2019	Graph
test	Ashley Walter	27 Sep 2019	Report
test	Ashley Walter	27 Sep 2019	Report
Copy of Average Rent by City	Justin Lee	26 Sep 2019	Graph
see	Justin Lee	26 Sep 2019	Report
Test	Ashley Walter	26 Sep 2019	Graph

Generate Ids

b. Press Generate IDs – this will generate for all records in Kurve



Generate Kurve IDs

Rows per page: 10 1-10 of 559 < >

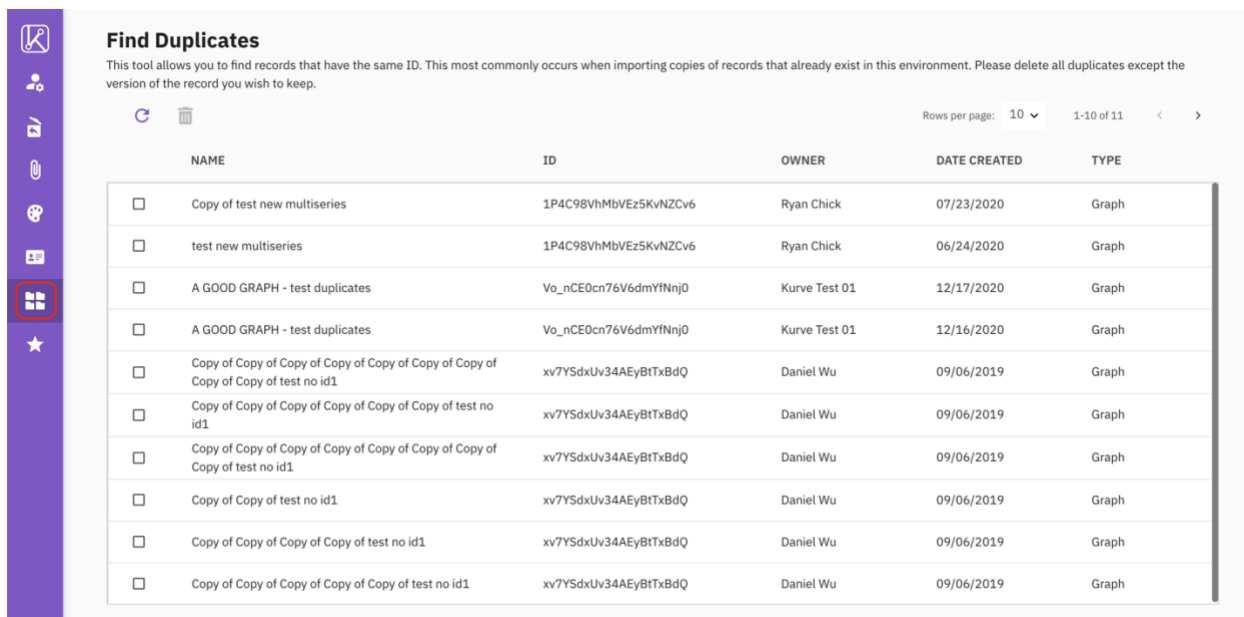
NAME	OWNER	DATE CREATED	TYPE
test filter	Ryan Chick	30 Sep 2019	Graph
test filter	Ryan Chick	30 Sep 2019	Report
hi	Justin Lee	30 Sep 2019	Graph
test	Ashley Walter	27 Sep 2019	Report
test	Ashley Walter	27 Sep 2019	Report
Copy of Average Rent by City	Justin Lee	26 Sep 2019	Graph
see	Justin Lee	26 Sep 2019	Report
Test	Ashley Walter	26 Sep 2019	Graph

Generate Ids

This page should now be blank.

11. Find Duplicates

This tool allows you to find records that have the same ID. This most commonly occurs when importing copies of records that already exist in this environment. Please delete all duplicates except the version of the record you wish to keep.



Find Duplicates
This tool allows you to find records that have the same ID. This most commonly occurs when importing copies of records that already exist in this environment. Please delete all duplicates except the version of the record you wish to keep.

Rows per page: 10 1-10 of 11

	NAME	ID	OWNER	DATE CREATED	TYPE
<input type="checkbox"/>	Copy of test new multiseries	1P4C98VhMbVEz5KvNZCv6	Ryan Chick	07/23/2020	Graph
<input type="checkbox"/>	test new multiseries	1P4C98VhMbVEz5KvNZCv6	Ryan Chick	06/24/2020	Graph
<input type="checkbox"/>	A GOOD GRAPH - test duplicates	Vo_nCE0cn76V6dmYfNnj0	Kurve Test 01	12/17/2020	Graph
<input type="checkbox"/>	A GOOD GRAPH - test duplicates	Vo_nCE0cn76V6dmYfNnj0	Kurve Test 01	12/16/2020	Graph
<input type="checkbox"/>	Copy of Copy of Copy of Copy of Copy of Copy of Copy of Copy of Copy of test no id1	xv7YSdxUv34AEyBTxBdQ	Daniel Wu	09/06/2019	Graph
<input type="checkbox"/>	Copy of Copy of Copy of Copy of Copy of Copy of test no id1	xv7YSdxUv34AEyBTxBdQ	Daniel Wu	09/06/2019	Graph
<input type="checkbox"/>	Copy of Copy of Copy of Copy of Copy of Copy of Copy of Copy of Copy of test no id1	xv7YSdxUv34AEyBTxBdQ	Daniel Wu	09/06/2019	Graph
<input type="checkbox"/>	Copy of Copy of test no id1	xv7YSdxUv34AEyBTxBdQ	Daniel Wu	09/06/2019	Graph
<input type="checkbox"/>	Copy of Copy of Copy of Copy of test no id1	xv7YSdxUv34AEyBTxBdQ	Daniel Wu	09/06/2019	Graph
<input type="checkbox"/>	Copy of Copy of Copy of Copy of Copy of test no id1	xv7YSdxUv34AEyBTxBdQ	Daniel Wu	09/06/2019	Graph

- After you have OM'd your graphs or reports to a new environment, you can easily check if the record already exists. If two IDs exist for the same record, you will be unable to open either of them.
- If you try to access a graph or report and the following error pops up, you will need to use the Find Duplicates.

Error: "Multiple records with this ID exist. Please contact your administrator"

Multiple records with this ID exist. Please contact your administrator.

OK

- c. Navigate to the Find Duplicates Page
- d. Look for your graph name or report name that you are trying to access. The records are organized by Name, ID, Owner, Date Created, and Type. Please note, this page is sorted according to the ID of each record.

Find Duplicates
This tool allows you to find records that have the same ID. This most commonly occurs when importing copies of records that already exist in this environment. Please delete all duplicates except the version of the record you wish to keep.

Rows per page: 10 1-10 of 10

	NAME	ID	OWNER	DATE CREATED	TYPE
<input type="checkbox"/>	Copy of test new multiseries	1P4C98VhMbVEz5KvNZCv6	Ryan Chick	07/23/2020	Graph
<input type="checkbox"/>	test new multiseries	1P4C98VhMbVEz5KvNZCv6	Ryan Chick	06/24/2020	Graph
<input type="checkbox"/>	Copy of Copy of Copy of Copy of Copy of test no id1	xv7YSdxUv34AEyBTxBdQ	Daniel Wu	09/06/2019	Graph
<input type="checkbox"/>	Copy of Copy of Copy of Copy of Copy of Copy of Copy of test no id1	xv7YSdxUv34AEyBTxBdQ	Daniel Wu	09/06/2019	Graph
<input type="checkbox"/>	Copy of Copy of Copy of Copy of Copy of Copy of Copy of Copy of test no id1	xv7YSdxUv34AEyBTxBdQ	Daniel Wu	09/06/2019	Graph
<input type="checkbox"/>	Copy of Copy of Copy of Copy of test no id1	xv7YSdxUv34AEyBTxBdQ	Daniel Wu	09/06/2019	Graph
<input type="checkbox"/>	Copy of Copy of Copy of Copy of Copy of Copy of Copy of Copy of Copy of test no id1	xv7YSdxUv34AEyBTxBdQ	Daniel Wu	09/06/2019	Graph
<input type="checkbox"/>	Copy of Copy of Copy of test no id1	xv7YSdxUv34AEyBTxBdQ	Daniel Wu	09/06/2019	Graph
<input type="checkbox"/>	Copy of Copy of test no id1	xv7YSdxUv34AEyBTxBdQ	Daniel Wu	09/06/2019	Graph
<input type="checkbox"/>	Copy of Copy of Copy of Copy of Copy of Copy of test no id1	xv7YSdxUv34AEyBTxBdQ	Daniel Wu	09/06/2019	Graph

- e. Once you have found the graph or report that is causing an error, compare the ID of the records around. If they match up, you will need to delete all duplicates except the version of the record you wish to keep.

Find Duplicates
This tool allows you to find records that have the same ID. This most commonly occurs when importing copies of records that already exist in this environment. Please delete all duplicates except the version of the record you wish to keep.

Rows per page: 10 1-10 of 10

	NAME	ID	OWNER	DATE CREATED	TYPE
<input type="checkbox"/>	Copy of test new multiseries	1P4C98VhMbVEz5KvNZCv6	Ryan Chick	07/23/2020	Graph
<input type="checkbox"/>	test new multiseries	1P4C98VhMbVEz5KvNZCv6	Ryan Chick	06/24/2020	Graph

- f. In this example, I have two records with the same ID. Choose the one you wish to keep, **and** delete the other. To delete, select the record and then click the trash icon.

Find Duplicates

This tool allows you to find records that have the same ID. This most commonly occurs when importing copies of records that already exist in the system to keep.

NAME ID OWN

<input checked="" type="checkbox"/> Copy of test new multiseries	1P4C98VhMbVEz5KvNZCv6	Ryan
<input type="checkbox"/> test new multiseries	1P4C98VhMbVEz5KvNZCv6	Ryan
<input type="checkbox"/> Copy of Copy of Copy of Copy of Copy of test no id1	xv7YSdxUv34AEyBtTxBdQ	Dani

- g. After deleting the duplicate, the other record will no longer appear on this list. The user will be able to access it as normal.

12. Manage Favorites

This tool allows Kurve Admins to manage their Kurve users' favorites.

- a. In the admin portal, click on the Star icon to access this page

Manage Favorites

Select a user to manage their favorites

User

Search by Name, Email

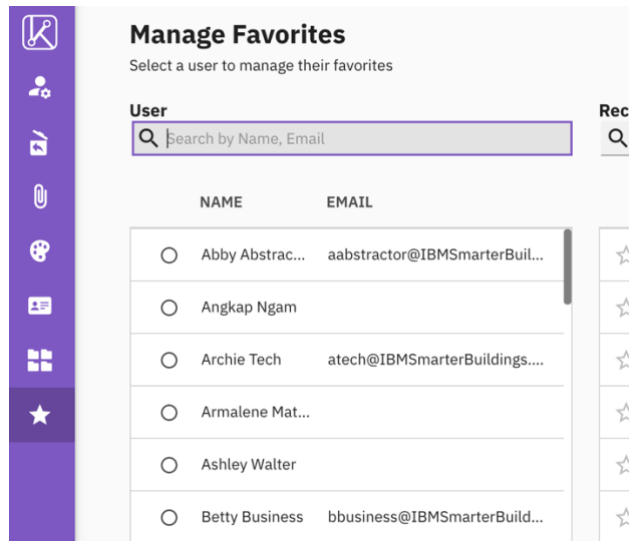
NAME	EMAIL
<input type="radio"/> Abby Abstrac...	aabstractor@IBMSmarterBuil...
<input type="radio"/> Angkap Ngam	
<input type="radio"/> Archie Tech	atech@IBMSmarterBuildings....
<input type="radio"/> Armalene Mat...	
<input type="radio"/> Ashley Walter	
<input type="radio"/> Betty Business	bbusiness@IBMSmarterBuild...
<input type="radio"/> Bill Ding	bding@IBMSmarterBuildings....
<input type="radio"/> Bob Barry	
<input type="radio"/> Brian Ma	
<input type="radio"/> Buster Rock	brock@IBMSmarterBuildings....
<input type="radio"/> Casey Cantwell	

Record

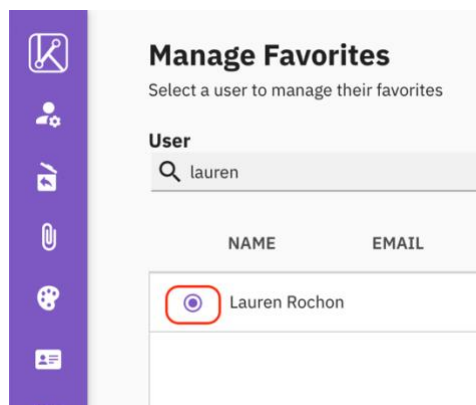
Search by Record Name, Source Query Name, or Owner

NAME	SOURCE QUERY NAME	CREATOR	CREATED	T...
☆ Test Blanks	cstRealEstateContract - All Active Lease ...	Colin Bingham	03/22/2021	G...
☆ All Active Leases	cstRealEstateContract - All Active Lease ...	Lauren Roch...	03/22/2021	G...
☆ Copy of Active Leases by Payment ...	cstRealEstateContract - All Active Lease ...	Lauren Roch...	03/22/2021	R...
☆ Copy of All Active Leases	cstRealEstateContract - All Active Lease ...	Ryan Chick	03/19/2021	G...
☆ test date filtering - equals	cstCapitalProject - All Capital Projects an...	Ryan Chick	03/19/2021	G...
☆ Copy of Parking Spaces by Store an...	Copy Of Store Directory	Lauren Roch...	03/19/2021	G...
☆ Date Filter Token Test Graph	cstWorkTask - Date Token Filter Test Query	Ryan Chick	03/19/2021	G...
☆ Copy of [I]Active Leases by Payment...	cstRealEstateContract - All Active Lease ...	Lauren Roch...	03/19/2021	R...
☆ Parking Spaces by Store and Neigh...	Copy Of Store Directory	Lauren Roch...	03/19/2021	G...
☆ Copy of Our Spaces	cstBuilding - All Buildings with Space an...	Lauren Roch...	03/19/2021	G...
☆ Copy of All Work Tasks by Type and...	triTask - Display - triMaintenanceManage...	Lauren Roch...	03/19/2021	G...

- b. Search for a user by Name or Email.



- c. Select the user by clicking the radio button next to their name.



- d. Once you select a user, you will be able to manage their favorites in the table on the right. If the user has any records already favorited, they will show up at the top of the list.

Manage Favorites
Select a user to manage their favorites

User
Q lauren

Lauren Rochon's Favorites
Q Search by Record Name, Source Query Name, or Owner

NAME	EMAIL	NAME	SOURCE QUERY NAME	CREATOR	CREATED	T...
Lauren Rochon		G&A PO by Vendor - Per Project - Li...	cstPurchaseOrder - Kurve - PO by Vendor...	Lauren Roch...	01/06/2021	R...
		Parking Spaces by Store and Neigh...	Copy Of Store Directory	Ellie Legal	12/31/2020	G...
		All Space Classes by Type	cstSpaceClassCurrent - All Space Classe...	Abby Abstra...	12/31/2020	G...
		Copy of All Assigned Work Tasks (A...	triTask - Display - triMaintenanceManage...	Lauren Roch...	12/14/2020	R...
		Count of All Active Leases	cstRealEstateContract - All Active Lease ...	Lauren Roch...	07/06/2020	G...
		test unescaped query 2	MAP (GIS) Query - Option Notices < 24 m...	Ryan Chick	08/26/2019	G...
		Test Blanks	cstRealEstateContract - All Active Lease ...	Colin Bingham	03/22/2021	G...
		All Active Leases	cstRealEstateContract - All Active Lease ...	Lauren Roch...	03/22/2021	G...
		Copy of Active Leases by Payment ...	cstRealEstateContract - All Active Lease ...	Lauren Roch...	03/22/2021	R...

- e. To favorite new: search for the record by name, query name or owner and then click the star next to the record to favorite it.

Manage Favorites
Select a user to manage their favorites

User
Q lauren

Lauren Rochon's Favorites
Q total

NAME	EMAIL	NAME	SOURCE QUERY NAME	CREATOR	CREATED	T...
Lauren Rochon		ALL CP BUDGET TOTAL	cstCapitalProject - All Capital Projects an...	Lauren Rochon	12/31/2020	G...
		Total Parking Spaces	cstBuilding - All Buildings with Space and...	Lauren Rochon	07/06/2020	G...

Lauren Rochon's Favorites
Q total

NAME	STATUS
ALL CP BUDGET TOTAL	CS
Total Parking Spaces	CS

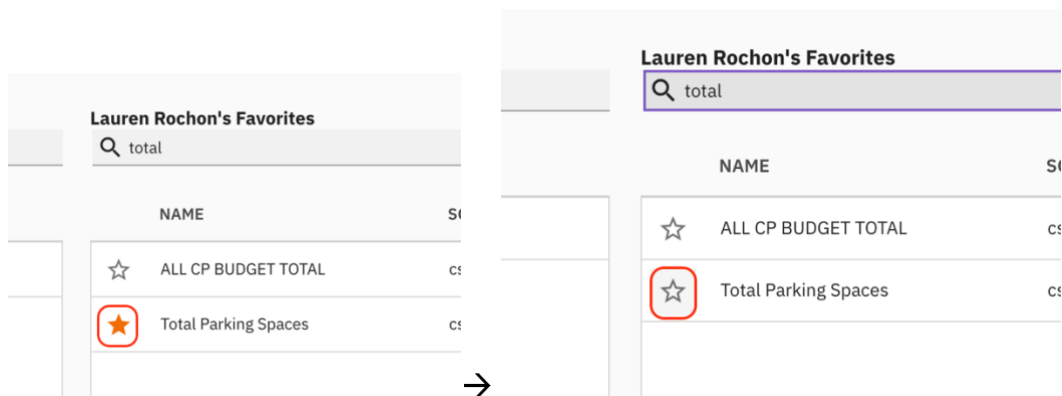
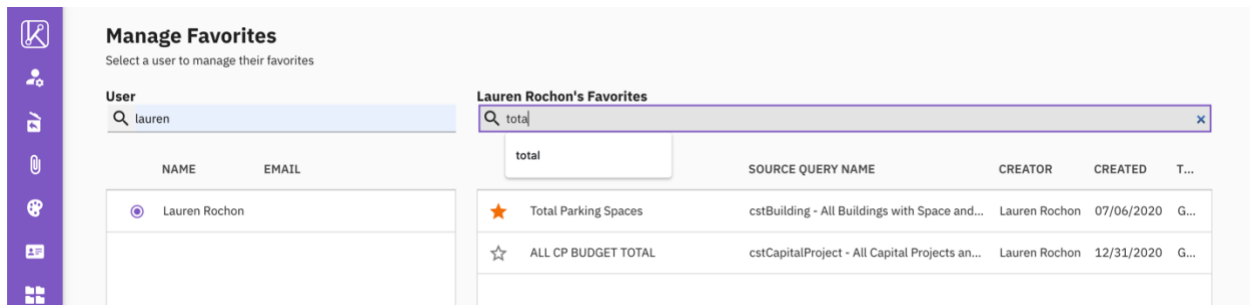
→

Lauren Rochon's Favorites
Q total

NAME	STATUS
ALL CP BUDGET TOTAL	CS
Total Parking Spaces	CS

The user will now see this in their list of favorites.

- f. To delete a favorite: find the record you would like to unfavorite and deselect the star icon so that it is no longer filled in.



APPENDIX

1. Appendix A: Kurve Custom Column Functions

For custom columns, Kurve allows the use of all standard JavaScript functions and objects, such as Math and Date. Additionally, a set of Kurve custom functions is provided:

Function Name	Description	Result Type
TRIRIGA Functions		
GetPathLevel(path,level)	Retrieves a specific level from a TRIRIGA hierarchy path field.	String
IsBlank(value)	Returns true if the given value is either null or an empty space, otherwise returns false.	Boolean
Date Functions		

AddDays(date, numberToAdd)	Adds a specified number of days to the given date. Can also be used to subtract days.	Date
AddTime(date, numberToAdd, unit)	Adds a specified number of a given unit of time to the given date. Supports milliseconds, seconds, minutes, hours, days, weeks, months, and years.	Date
AddTRIDuration(date, duration)	Adds a TRIRIGA duration to a given date and returns the resulting date.	Date
ConvertDuration(duration, input, output)	Converts a given duration from one unit of time to another. Supports milliseconds, seconds, minutes, hours, days, weeks, months, and years.	Number
ConvertMilliseconds(duration, output)	Converts a given duration in milliseconds into another specified unit of time. Supports milliseconds, seconds, minutes, hours, days, weeks, months, and years.	Number
ConvertTRIDuration(duration)	Converts a duration from TRIRIGA into a duration in milliseconds.	Number
DaysBetween(date1, date2, showNegative)	Returns the number of calendar days between two given dates. The showNegative option will control whether or not negative days will be displayed or shown as a 0. The default is true, which will show the negative numbers.	Number
FilterDay(date, range)	Returns true if the date entered is within the range of days in relation to the current date. If not specified, default range is 30 days.	Boolean
FilterMonth(date, range)	Returns true if the date entered is within the range of months in relation to the current date. If not specified, default range is 3 months.	Boolean
FilterYear(date, range)	Returns true if the date entered is within the range of year(s) in relation to the current date. If not specified, default range is 1 year.	Boolean
FormatDate(date,format)	Returns a date String in the specified format.	String

	<p>Example formats: “MM/DD/YYYY”, “YYYY-MM-DD hh:mm:ss”</p> <p>For a list of supported date formats see here.</p>	
GetDay(date, addZeroes)	Returns the day number of the given date. Can optionally return days as a 2 digit number (e.g. 01, 02) if addZeroes is true.	Number
GetDayOfWeek(date)	Returns the day name (e.g. “Monday”) of a given date	String
GetDayOfYear(date, addZeroes)	Returns the day of year number of the given date. Can optionally return days as a 3 digit number (e.g. 001, 002) if addZeroes is true.	Number
GetEndOfMonth(date)	Returns the date at the last day of the given date's month. The time is set to 1 millisecond before midnight. This can be used to group dates on a monthly basis.	Date
GetEndOfYear(date)	Returns the date at the last day of the given date's year. The time is set to 1 millisecond before midnight. This can be used to group dates on a yearly basis.	Date
GetFirstOfMonth(date)	Returns the date at the first day of the given date's month. This can be used to group dates on a monthly basis.	Date
GetFirstOfYear(date)	Returns the date at the first day of the given date's year. This can be used to group dates on a yearly basis.	Date
GetMonth(date), addZeroes)	Returns the month number of the given date. Can optionally return months as a 2 digit number (e.g. 01, 02) if addZeroes is true.	Number
GetMonthName(date)	Returns the full month name (e.g. “January”) of a given date	String
GetQuarter(date)	Returns the year quarter of the given date.	Number
GetWeek(date, addZeroes)	Returns the week number of the given date. Can optionally return weeks as a 2 digit number (e.g. 01, 02) if addZeroes is true.	Number

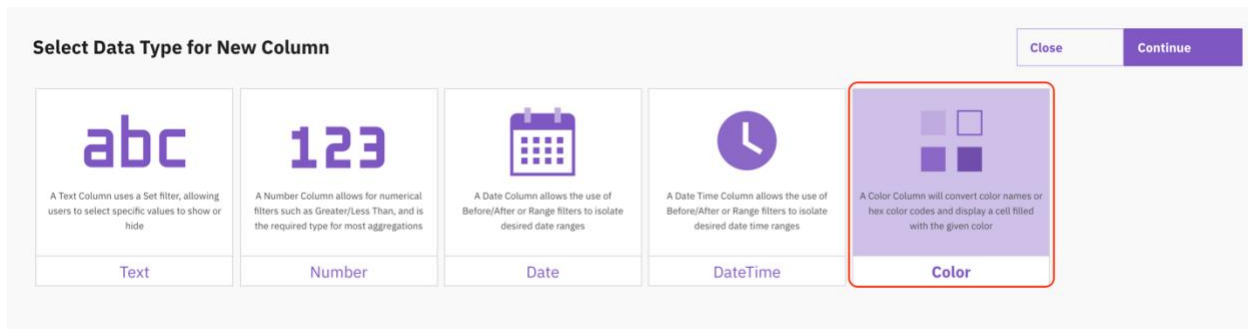
GetWeeksInMonth(date, weekStartDate)	Returns the number of calendar weeks in the given date's month. The first day of the week can be optionally specified with a number from 0-6, the default is 0, for Sunday.	Number
GetYear(date)	Returns the year number of the given date.	Number
IsDateAfter(date, dateToCompare)	Returns true if the given date occurs after the date to compare. Returns N/A if dates are missing or invalid.	Boolean
IsDateBefore(date, dateToCompare)	Returns true if the given date occurs before the date to compare. Returns N/A if dates are missing or invalid.	Boolean
IsDateBetween(date, start, end)	Returns true if the given date occurs between the start and end dates. Returns N/A if dates are missing or invalid.	Boolean
Now()	Returns the current time	Date
SubtractTRIDuration(date, duration)	Subtracts a TRIRIGA duration from a given date and returns the resulting date.	Date
TimeBetween(date1,date2, units)	Returns the amount of time between two given dates in the specified unit of measure. Supports years, months, weeks, days, hours, minutes, and seconds.	Number
Today()	Returns the current date at 00:00	Date
Number Functions		
FormatCurrency(number, symbol, thousandSeparator, decimalSeparator, precision)	Formatting numbers as money values rounded to the specified level of precision. If not specified, default precision is 2.	Number
Math.max(num1, num2, ...)	Returns the maximum of 2 or more numbers.	Number
Math.min(num1, num2, ...)	Returns the minimum of 2 or more numbers.	Number
RoundNumber(number, precision)	Returns a number rounded to the specified level of precision. If not specified, the default level of precision is 0.	Number
Text Functions		

Delimiter(input, inputSplit, outputSplit)	Converts a string delimited by a specified input character and replaces the input delimiter with the chosen output character.	Any
GroupNulls(column)	Converts null values to empty strings. Can be used to force blank values to be grouped together.	String
PadEnd(input, length, fill)	Pads an input string up to the specified length with the given fill character. Fill characters are inserted at the end of the input string.	Any
PadStart(input, length, fill)	Pads an input string up to the specified length with the given fill character. Fill characters are inserted at the start of the input string.	Any
Truncate(input, start, length)	Extracts a given number of characters from a text input, starting at the specified character. The first character is counted as 0. If length is not provided, will extract from start to the end.	Any
Helper/JS Functions		
Color Column Snippet	An example of a conditional color column with text. Replace content in [] with your own conditions, text, colors.	Color & Text
IF(condition, valueIfTrue, valueIfFalse)	Excel style IF function. Evaluates a condition, and returns a value depending on if the condition is true or false. JavaScript IF conditions also supported.	Any

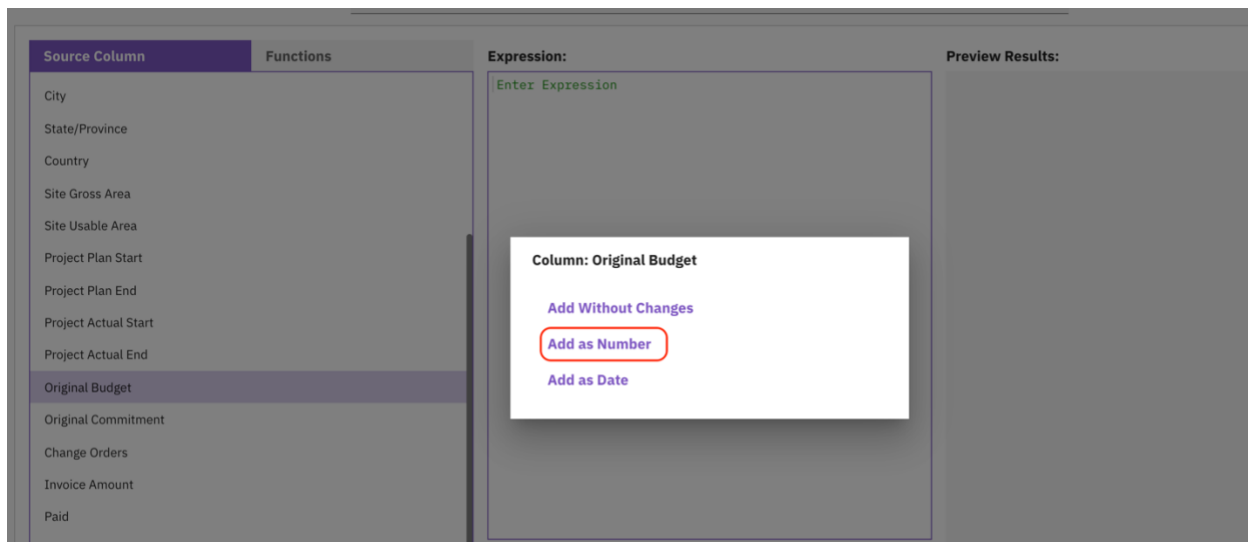
2. Appendix B: Custom Column Types – Color & Text

When creating a color column, the name of the color or the hex code can be used to define the colors you want to display.

- a. Select Column Type: Color Column



- b. Select the column you would like to use as your Source Column. If you need to do calculations or numerical comparisons with this column's data, it should be added as a number; otherwise you can add it without changes.



- c. In the expression you can:
 - i. Input one colour or hex code that you would like the column to be. Ensure you put it in quotations. You can also use the color picker in the operators!

Expression:

"pink"

OR

Expression:

"#00b4f5"

- ii. Use a formula. For example, to color all projects that have a Budget Original greater than 10,000 red and all others blue, use the following formula:

```
if(numCol('Budget Original') > 100000){ "red" } else { "blue" }
```

If you would like the words to display your parameters, before the color (within the quotes), input the word and &&.::

```
if(numCol('Budget Original') > 100000){ ">100,000 && red" } else { "<100,000 && blue" }
```

Expression:

```
if(numCol('Budget Original') > 100000){  
  ">100,000 && red" } else { "<100,000  
  && blue" }
```

If you use a Hex Code, it would look something like this:

```
if(numCol('Budget Original') > 10000){ "#D32C09" } else { "#0962D3" }
```


If you want to add text within the color column, it would look like this:

```
if(numCol('Budget Original') > 100000){ ">100,000 && #D32C09" } else { "<100,000 && #0962D3" }
```

Expression:

```
if(numCol('Budget Original') > 100000){  
  ">100,000 && #D32C09" } else { "<100  
  ,000 && #0962D3" }
```

d. The column preview will show as the color chosen.



The screenshot displays the 'Create Column' interface with four main sections:

- Source Column:** A list of columns including 'Project Plan Start', 'Project Plan End', 'Project Actual Start', 'Project Actual End', 'Original Budget', 'Original Commitment', 'Change Orders', 'Invoice Amount', 'Paid', and 'Currency'.
- Functions:** A section for selecting functions.
- Expression:** A text area containing the following code:

```
if(numCol('Budget Original') > 100000){  
  ">100,000 && #D32C09" } else { "<100,000 && #0962D3" }
```
- Preview Results:** A table showing the results of the expression. It lists ten values, all of which are less than 100,000, and the entire table has a blue background color.

e. Click Create Column at the bottom center of the screen.



f. View the colour results

Original Budget	Budget Parameters
\$0.00	<100,000
\$41,000.00	<100,000
\$63,000.00	<100,000
\$47,600.00	<100,000
\$0.00	<100,000
\$0.00	<100,000
\$0.00	<100,000
\$1,185,922.53	>100,000
\$1,554,285.47	>100,000
\$0.00	<100,000
\$0.00	<100,000
\$234,819.13	>100,000

Another way to use a color column is to show a different color depending on if it matches a specific value. For this, I would follow the same steps as above but instead of adding the source column as a number, I would leave it unchanged. Then for the expression, if I want all the records that are in the Development Phase to show as pink and all others to appear blue I would input:

```
if(col('Country') == "United States"){ "blue" } else { "yellow" }
```

Country		Country Color Code	
Canada			
Russia			
United States			
United States			
Belgium			
United States			
United States			
Belgium			
Brazil			