Custom Reports User guide

Version 13.01.00

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Table of Contents

Chapter 1

Custom Reports

The **Custom Reports** User Manual explains how to use I-Suite data to create reports that are not available in the standard reports.

All custom reports can be viewed and printed by other I-Suite users with the same rights.

Only the original report creator can delete or make changes to a report they created.

The basic features of the **Custom Reports** window include:

- **Report Designer** – Allows you to pick fields to use in creating custom reports. Once the report is created, you can save it to the database.

- **Advanced Designer** – Allows you to construct a valid SQL statement to create custom reports. Once the report is created, you can save it to the database.

- **Manage Saved Reports** – Allows you to preview, print, edit, delete, export and import custom reports.

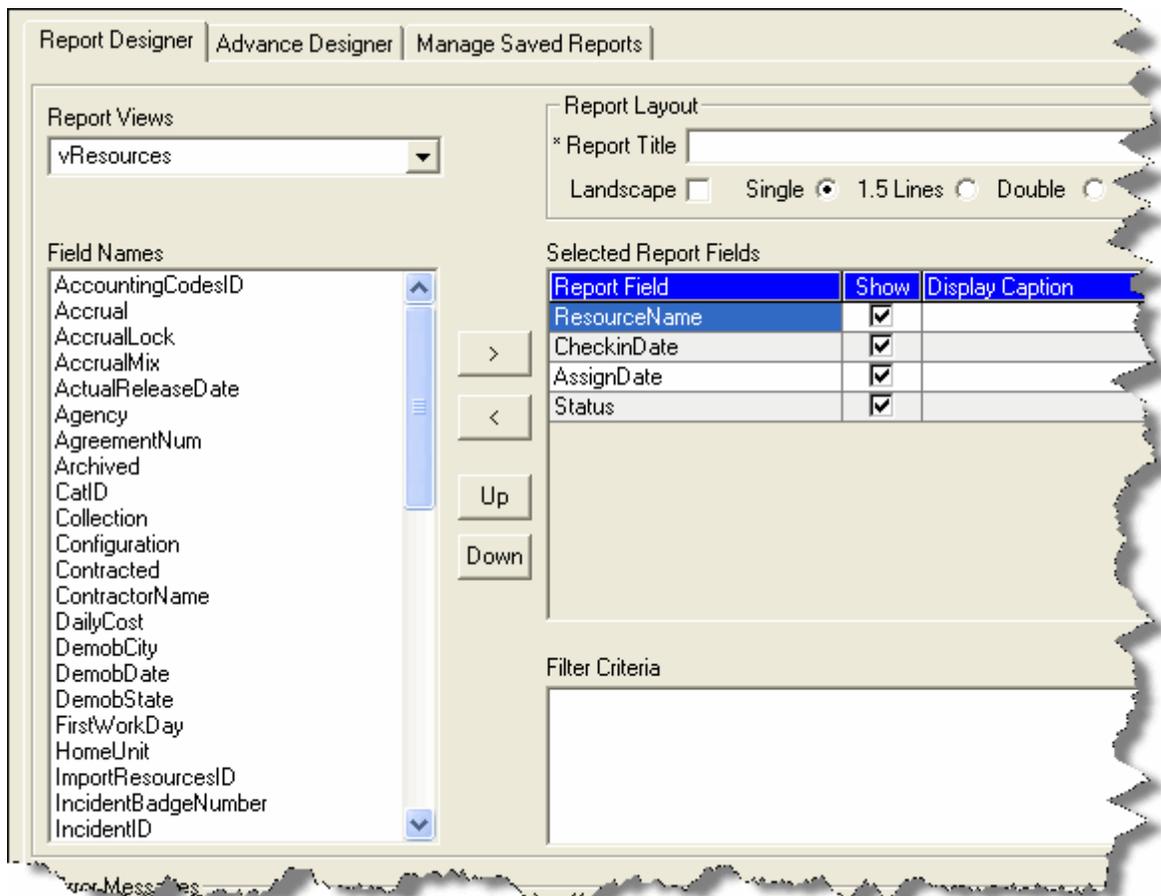Topics in this section include the following:

Chapter 2

Report Designer

Follow the steps in this section to design and print a custom report in **Report Designer**:

1. From the **Reports** menu, select **Custom Reports** to open the **Custom Reports** window.

2. From the **Report Views** drop-down list on the **Report Designer** tab, select the view to use in creating the report. The fields available for the report are based on the view that you select.

The data views that are available are based on the **Rights** associated with your **User ID**.

If a report was created for the selected **Report View**, a message displays asking

whether you want to clear the designer and create a new report. Click **Yes** to create a new report. Click **No** if you want to edit the current report, not create a new one.

3. Click one or more fields under **Field Names** to highlight them. Then click the **>>** button to move the fields under **Selected Report Fields**. The fields you select print on the custom report. Repeat this step until all of the fields you want to include in the report are listed under **Selected Report Fields**.

4. If you need to rearrange the order in which the fields print on the report, highlight the field you want to move under **Selected Report Fields**. Then click the **Up** or **Down** button to move the field.

5. To change the column heading on the report, enter the name in the **Display Caption** field.

6. To change the width of a column in the report, enter the new width in the **Width** field.

7. To change the sort order for a column to either **Ascending** or **Descending**, select either **ASC** or **DESC** from the **Sort** drop-down list.

8. To add an aggregate to a column, select the appropriate option from the **Aggregate** drop-down list.

9. Under **Report Layout**, enter a **Report Title** for the custom report.

The **Report Title** must be unique. If there is a custom report that contains the same name, a message displays indicating that a report was already created with that title when you save the report. You must then enter a different title for the report before saving it.

10. If you want the report to print in a **Landscape** format, click to check the **Landscape** checkbox. If you want the report to print in a **Portrait** format, remove the check from the **Landscape** checkbox.

11. Click the line spacing to use under **Report Layout**. You can select **Single**, **1.5**, or **Double**.

12. To save your custom report, click the **Save** button. When the message window displays, click the **OK** button to close the window.

Saved **Custom Reports** are listed under **Manage Saved Reports** from where they can be **Printed**, **Edited**, **Deleted**, **Copied**, **Exported** or **Imported** as needed.

13. To preview the report and then print it, click the **Preview** button. When the **Preview** window displays, click the **Print Report** button.

To print the report without first previewing it, click the **Print** button.

14. When the **Print** window displays, click the **Print** button

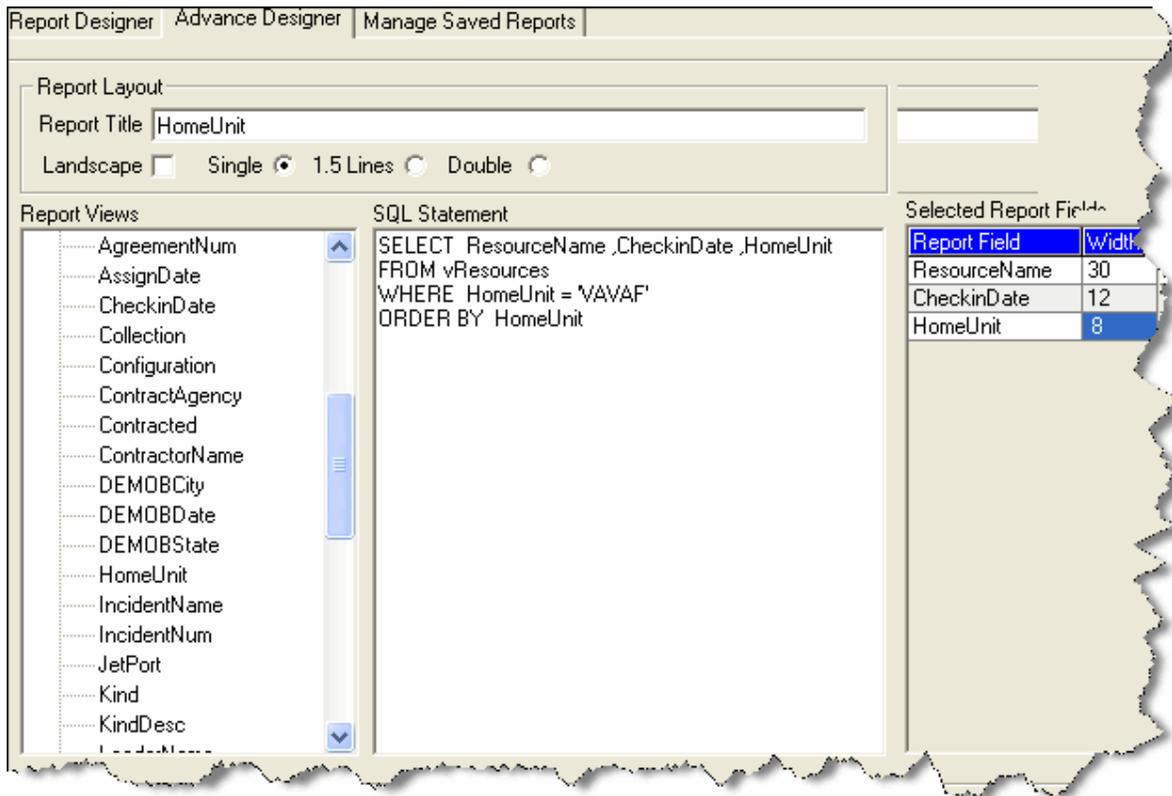You can **Preview** and **Print** your report before or after you save it. You do not have to save your report.

If you intend to save your report, it is a good practice to save it before you preview or print it.

Chapter 3

Advanced Designer

Follow the instructions in this section to create and print custom reports with the **Advanced Designer**:

1. From the **Reports** menu, select **Custom Reports** to open the **Custom Reports** window.

2. Click the **Advanced Designer** tab.

3. Under **Report Layout**, enter a **Report Title** for the custom report.

The **Report Title** must be unique. If there is a custom report that contains the same name, a message displays indicating that a report was already created with that title when you save the report. You must then enter a different title for the report before saving it.

4. If you want the report to print in a **Landscape** format, click to check the **Landscape** checkbox. If you want the report to print in a **Portrait** format, remove the check from the **Landscape** checkbox.

5. Click the line spacing to use under **Report Layout**. You can select **Single**, **1.5**, or **Double**.

6. Under **Report Views**, double-click a listed table to display a list of fields for that table. Double click a field to added it to the **SQL Statement**.

7. In the **SQL Statement** frame, construct a valid SQL statement. Then click the **Check** button to check the validity of the statement and move the **SQL Statement** to **Selected Report Fields**.

    If the **SQL Statement** is invalid, a message displays under **Error Messages**. Correct the error in the **SQL Statement** and then click the **Check** button again. For more information on writing valid SQL statements, refer to Components of a Valid SQL Statement (See Page 8).

8. To change a column width, enter the appropriate **Width** next to the **Report Field**.

9. To save your custom report, click the **Save** button.

10. When the message displays indicating that the report was saved, click the **OK** button to close the window.

Saved **Custom Reports** are listed under **Manage Saved Reports** from where they can be **Printed**, **Edited**, **Deleted**, **Copied**, **Exported** or **Imported** as needed.

11. To preview the report and then print it, click the **Preview** button. When the Preview window displays, click the **Print Report** button.

    To print the report without first previewing it, click the **Print** button.

12. When the **Print** window displays, click the **Print** button.

You can **Preview** and **Print** your report before or after you save it. You do not have to save your report.

Components of a Valid SQL Statement

Data retrieval operations (queries) search the database, retrieve information that you have requested in the most efficient way possible, and display it.

The following is a list of some of the Keywords used in SQL statements:
*   SELECT clause – identifies the data.

- FROM clause – identifies the table.

- WHERE clause – limits the data that the SELECT statement returns.

- GROUP BY – organizes data into sets.

- COUNT(*) – gives a summary value per set (e.g.: 209 Resource List).

- DISTINCT - allows you to remove duplicates from the result set.

- TOP - specifies that only the first set of rows will be returned from the query result.

- ORDER BY - sets the order for the data sets that are returned from the query result.

The following is a list of some best practices to follow when constructing SQL statements:

- KEYWORDS – in uppercase.

- All other words – in lowercase.

- Clauses – each clause on a separate line.

- Complex WHERE clause – can be separated onto multiple lines.

- Minimum requirement – a valid SQL statement must have at least a SELECT and a FROM clause.

The following diagram shows basic SQL statement formatting.

Basic SQL statement format:
SELECT *fieldname 1*, *fieldname 2*, ...*fieldname n*
FROM *tablename*
WHERE *fieldname* conditional *value* (logic_operand *fieldname* conditional *value* ...)
ORDER BY *fieldname*

conditional				logic_operand	
=	Equal To	>=	Greater Than	OR	Either conditional statement being True will

conditional			logic_operand	
		Or Equal To		
<>	Not Equal To	<	AND	Both conditional statements must be True t
>	Greater Than	<=	NOT	Reverses the conditional statement value (
		Less Than or Equal To		
LIKE	Text Comparison (use with % for wildcard values; for example: Kind LIKE 'HC%')			

SQL Statement Examples

The following are example SQL statements:

SELECT RequestNumber, ResourceName AS Crew
FROM vBasicRpts
WHERE Status <> 'D' AND ResourceName LIKE 'M%' and KindCode in ('HC1', 'HC2')

SELECT ResourceName, CheckinDate FROM vBasicRpts
WHERE KindCode = 'DIVS' and CheckinDate between '05/15/07' and '05/20/07'
ORDER BY ResourceName

SELECT Agency, COUNT(*) AS [Agency Count], SUM(NumberPersonnel) AS
NumberPersonnel
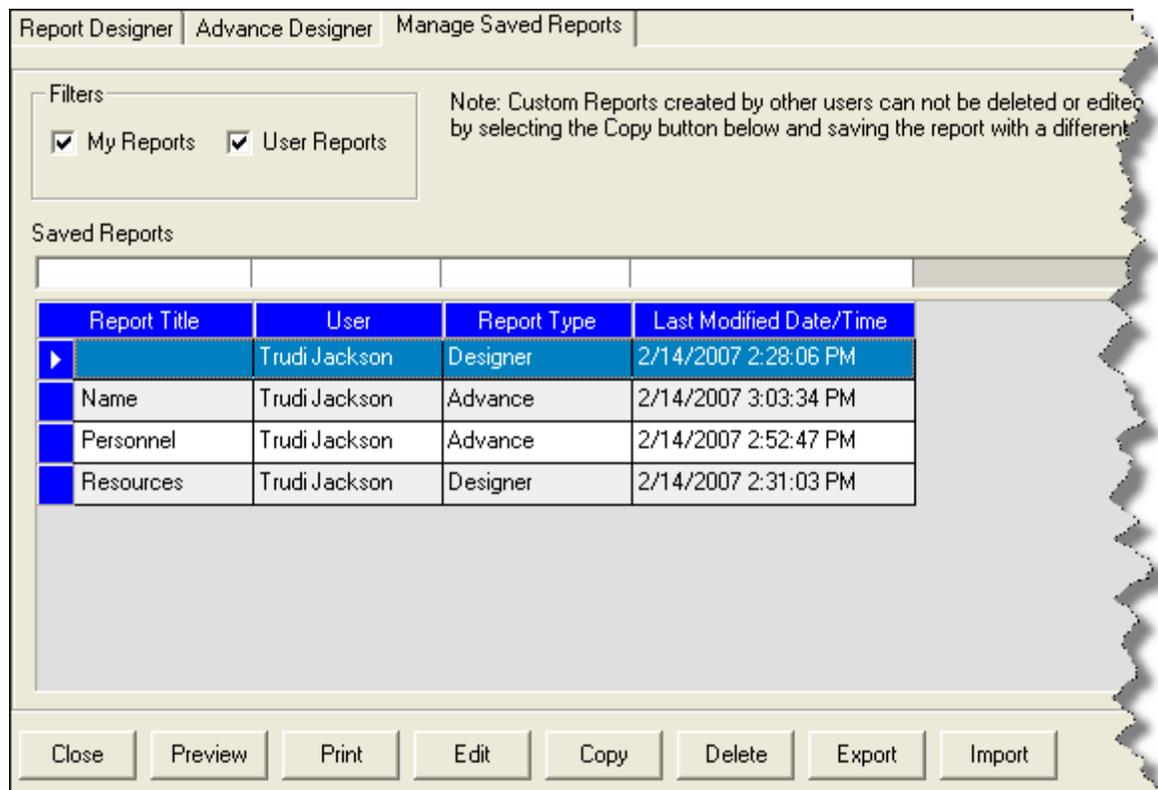FROM vBasicRpts
GROUP By Agency

Chapter 4

Manage Saved Reports

This section explains how to manage saved reports in Custom Reports.

Previewing and Printing Custom Reports

Follow the steps in this section to preview and print saved custom reports:

1. From the **Reports** menu, select **Custom Reports** to open the **Custom Reports** window.

2. Click the **Manage Saved Reports** tab.

3. Under **Filters**, click to check or uncheck the following checkboxes to identify the reports to include in the **Saved Reports** grid:

   - **My Reports** - When this checkbox is checked, the **Saved Reports** grid includes all of the custom reports that you created.

- **User Reports** - When this checkbox is checked, the **Saved Reports** grid includes all of the custom reports created by users with the same rights as you.

4. In the **Saved Reports** grid, click the report you want to preview and print.

5. To preview and then print the report, click the **Preview** button. When the Preview window opens, click the **Print Report** button.

    To print the report without first previewing it, click the **Print** button.

6. When the **Print** window displays, click the **Print** button.

Editing Custom Reports

Follow the steps in this section to edit custom reports:

Only the user who originally created the report can make changes to it.

1. From the **Reports** menu, select the **Custom Reports** option to open the **Custom Reports** window.

2. Click the **Manage Saved Reports** tab.

3. Under **Filters**, click to check or uncheck the following checkboxes to identify the reports to include in the **Saved Reports** grid:

    - **My Reports** - When this checkbox is checked, the **Saved Reports** grid includes all of the custom reports that you created.

    - **User Reports** - When this checkbox is checked, the **Saved Reports** grid includes all of the custom reports created by users with the same rights as you.

4. In the **Saved Reports** grid, click the report you want to edit.

5. Click the **Edit** button. The report opens in the appropriate designer window.

6. Make the appropriate changes to the report.

7. Click the **Save** button to save your changes

Copying Custom Reports

Follow the steps in this section to copy a custom report:

Users that did not create the original custom report can still copy it to create a new report.

1. From the **Reports** menu, select the **Custom Reports** option to open the **Custom Reports** window.

2. Click the **Manage Saved Reports** tab.

3. Under **Filters**, click to check or uncheck the following checkboxes to identify the reports to include in the **Saved Reports** grid:

   - **My Reports** - When this checkbox is checked, the **Saved Reports** grid includes all of the custom reports that you created.

   - **User Reports** - When this checkbox is checked, the **Saved Reports** grid includes all of the custom reports created by users with the same rights as you.

4. In the **Saved Reports** grid, click to select the report you want to copy.

5. Click the **Copy** button.

6. If the report was created in the **Report Designer**, that tab automatically opens. If the report was created in the **Advanced Report Designer**, that tab automatically opens.

7. Make the appropriate changes to the copied report.

8. In the **Report Title** box, enter a unique title for the report.

9. Click the **Save** button to save the report.

Deleting Custom Reports

Follow the steps in this section to delete custom reports:

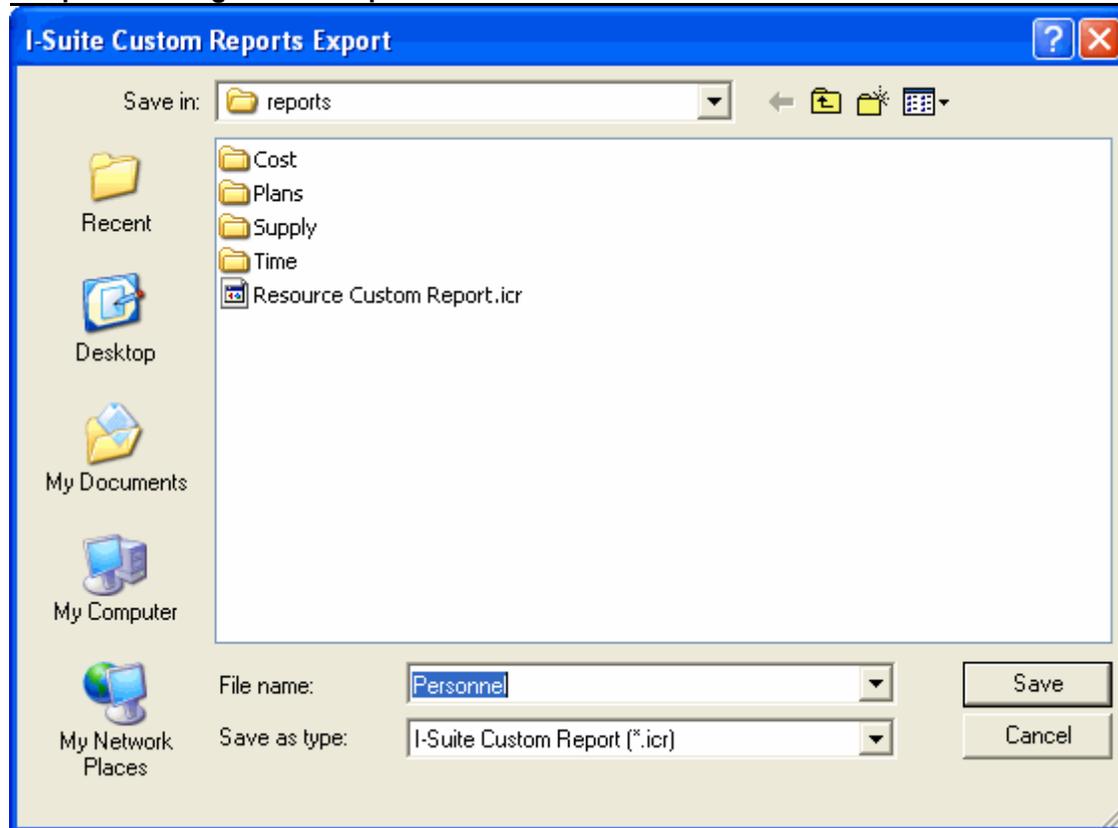Only the user who originally created the report can delete it.

1. From the **Reports** menu, select the **Custom Reports** option to open the **Custom Reports** window.

2. Click the **Manage Saved Reports** tab.

3. Under **Filters**, click to check or uncheck the following checkboxes to identify the reports to include in the **Saved Reports** grid:

   - **My Reports** - When this checkbox is checked, the **Saved Reports** grid includes all of the custom reports that you created.

- **User Reports** - When this checkbox is checked, the **Saved Reports** grid includes all of the custom reports created by users with the same rights as you.

4. In the **Saved Reports** grid, click the report you want to delete.

5. Click the **Delete** button.

6. When the message displays asking whether you want to delete the report, click the **Yes** button to remove the report from the system.

7. A message displays indicating that the saved report was deleted. Click the **OK** button to close the message window.

Exporting Custom Reports

Follow the steps in this section to export custom reports:

1. From the **Reports** menu, select **Custom Reports** to open the **Custom Reports** window.

2. Click the **Manage Saved Reports** tab.

3. Under **Filters**, click to check or uncheck the following checkboxes to identify the reports to include in the **Saved Reports** grid:

- **My Reports** - When this checkbox is checked, the **Saved Reports** grid includes all of the custom reports that you created.

- **User Reports** - When this checkbox is checked, the **Saved Reports** grid includes all of the custom reports created by users with the same rights as you.

4. In the **Saved Reports** grid, click the report you want to export.

5. Click the **Export** button. A **Custom Reports Export** window displays.
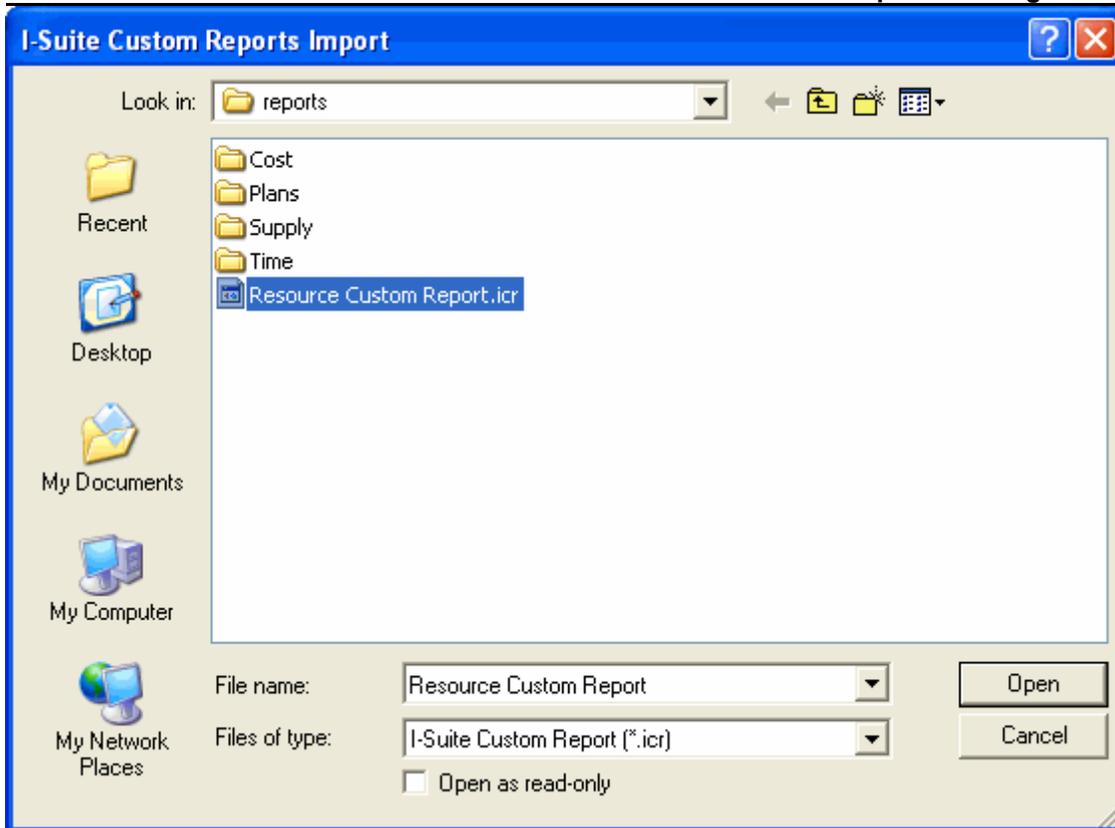
6. From the **Save in** drop-down list, select the directory where you want to save the custom report.

7. The report's name automatically displays in the **File Name** field. If you want to assign a different name to the report, enter the new name into the **File Name** field.

8. Click the **Save** button to export the custom report.

9. When the message displays indicating that the export was successful, click the **OK** button to close the window.

Importing Custom Reports

Follow the steps in this section to import custom reports into the I-Suite system:

1. From the **Reports** menu, select **Custom Reports** to open the **Custom Reports** window.

2. Click the **Manage Saved Reports** tab.

3. Click the **Import** button. A **Custom Reports Import** window displays.

4. From the **Look in** drop-down list, select the directory where the custom report is saved.

5. Click the custom report you want to import.

6. Click the **Open** button to import the report.

Appendix A

Revision History

Revision Date	Revision Summary
2010-04-27	Revised instructions for the 10.01.00 version of I-Suite.
2009-05-01	Revised instructions for the 9.01.00 version of I-Suite.
2008-04-25	Revised instructions for the 8.01.00 version of I-Suite.
2007-07-25	Revised instructions for the 7.01.05 version of I-Suite.
2007-04-20	Revised instructions for the 7.01.00 version of I-Suite.
2007-01-19	Revised instructions based on changes received for Training Manuals.
2006-12-04	Revised instructions by adding more detail and graphics.
2006-06-12	Revised instructions for the 6.02 version of I-Suite.
2006-04-12	Instructions for new module of the new I-Suite 2006 application.

Index

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ERROR: undefined
OFFENDING COMMAND:

STACK:
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