



UNIT 9

I-Suite Custom Reports

11/11/2008

TOTAL SUGGESTED TIME: 1 hour 30 minutes

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I-Suite Custom Reports

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DETAILED LESSON OUTLINE

COURSE:	I-Suite
UNIT:	9.0 – Custom Reports: Overview.
SUGGESTED TIME:	10 minutes
TRAINING AIDS:	Computer projector, screen, computer (one for instructor and one per trainee).
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Identify the purpose of Custom Reports.2. Identify the basic features of the Custom Reports screen.

OUTLINE	AIDS & CUES
INTRODUCE THE UNIT.	← Instructor Comments
PRESENT UNIT OBJECTIVES.	
I. CUSTOM REPORTS	9.0-01-ISUITE-EP
A. Identify the purpose of Custom Reports.	9.0-02-ISUITE-EP
1. The purpose of Custom Reports is to use I-Suite data to create reports that are not available in the Standard Reports.	
NOTE: All custom reports can be viewed and printed by other I-Suite users with the same rights.	← Read Note
NOTE: Only the original report creator can make changes to a report they created. Only the original report creator or an administrator can delete saved reports.	← Read Note
II. BASIC FEATURES	
A. Identify the basic features of the Custom Reports window.	
EXPLAIN THE BASIC FEATURES OF THE CUSTOM REPORTS SCREEN AND CONDUCT A QUICK, UNINTERRUPTED WALK THROUGH OF EACH OF THE CUSTOM REPORTS TABS.	← Instructor Comment
1. Report Designer - Create a custom report by selecting fields from a Data View and adding them to the report.	
2. Advanced Designer - Create a custom report by constructing a valid SQL statement.	
NOTE: With both designers you can save your Custom Reports.	← Read Note
NOTE: The data views that are available in both designers are based on the Rights associated with your User ID .	← Read Note
3. Manage Saved Reports - Print, preview, edit, delete, export and import saved Custom Reports.	
DO NOT FIELD STUDENT QUESTIONS DURING THE WALK THROUGH. (HAVE STUDENTS SAVE THEIR QUESTIONS FOR THE LECTURE.)	← Instructor Comment

DETAILED LESSON OUTLINE

COURSE:	I-Suite
UNIT:	9.1 – Custom Reports: Report Designer.
SUGGESTED TIME:	30 minutes
TRAINING AIDS:	Computer projector, screen, computer (one for instructor and one per trainee).
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Design Custom Reports using Report Designer.2. Preview and Print from Report Designer.

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<p>INTRODUCE THE UNIT.</p>	<p>← Instructor Comment</p>
<p>PRESENT UNIT OBJECTIVES.</p>	
<p>I. REPORT DESIGNER</p>	
<p>A. Design Custom Reports using Report Designer.</p>	
<p>B. Preview and print from Report Designer.</p>	
<p>II. DESIGN CUSTOM REPORTS</p>	<p>9.0-03-ISUITE-EP</p>
<p>A. To design Custom Reports using Report Designer:</p>	
<p>1. From the Reports drop-down menu, select Custom Reports. On the Custom Reports window, click the Report Designer tab.</p>	
<p>2. From the Data Views drop down list, select the Report Views you want to use.</p>	
<p>NOTE: 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.</p>	<p>← Read Note</p>
<p>3. Click one or more fields under Field Names to highlight them. Then click the >> button to move the fields to 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.</p>	
<p>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.</p>	
<p>5. To change the column heading on the report, enter the name in the Display Caption field.</p>	
<p>6. To change the width of a column in the report, enter the new width in the Width field.</p>	
<p>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.</p>	
<p>8. To add an aggregate to a column, select the appropriate option from the Aggregate drop-down</p>	

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list.	
9. Under Report Layout , enter a Report Title for the custom report.	
<p>NOTE: The Report Title is used to store and retrieve the report. It 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.</p>	<p>← Read Note</p>
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 one of the following to identify the line spacing to use in the report: <ol style="list-style-type: none"> a. Single b. 1.5 Lines c. Double. 	
12. When finished, click the Save button to save your Custom Report .	
<p>NOTE: Saved Custom Reports are listed under Manage Saved Reports from where they can be Printed, Edited, Deleted, Copied, Exported, or Imported, as needed.</p>	<p>← Read Note</p>
B. Preview and print the report in Report Designer.	9.0-04-ISUITE-EP
<ol style="list-style-type: none"> 1. To preview and print your report, click the Preview button, and then click the Print Report button on the Preview screen. 2. To print your report without previewing, click the Print button on the Custom Reports screen. 	
<p>NOTE: You can Preview and Print your report before or after you save it. You do not have to save your report.</p>	<p>← Read Note</p>
<p>NOTE: If you intend to save your report, it is a good practice to save it before you preview it.</p>	<p>← Read Note</p>
<p>REVIEW UNIT OBJECTIVES.</p>	<p>← Instructor Comment</p>

DETAILED LESSON OUTLINE

COURSE:	I-Suite
UNIT:	9.2 – Custom Reports: Advanced Designer.
SUGGESTED TIME:	30 minutes
TRAINING AIDS:	Computer projector, screen, computer (one for instructor and one per trainee).
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Design Custom Reports using Advanced Designer.2. Preview and Print from Advanced Designer.3. Define components of a valid SQL statement.

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<p>INTRODUCE THE UNIT.</p>	<p>← Instructor Comments</p>
<p>PRESENT UNIT OBJECTIVES.</p>	
<p>I. ADVANCED DESIGNER</p>	
<p>A. Design Custom Reports using Advanced Designer.</p>	
<p>B. Preview and Print from Advanced Designer.</p>	
<p>C. Define components of a valid SQL statement.</p>	
<p>II. DESIGN CUSTOM REPORTS</p>	<p>9.0-05-ISUITE-EP</p>
<p>A. Design Custom Reports using Advanced Designer.</p>	
<p>1. Open Custom Reports. Then click the Advanced Designer tab.</p>	
<p>2. Under Report Layout, enter a Report Title for your report.</p>	
<p>NOTE: The Report Title is used to store and retrieve the report. It 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.</p>	<p>← Read Note</p>
<p>1. 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.</p>	
<p>2. Click one of the following under Report Layout to identify the line spacing to use in the report:</p>	
<p>a. Single</p>	
<p>b. 1.5 Lines</p>	
<p>c. Double.</p>	
<p>5. 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.</p>	
<p>6. Under SQL Statement, 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.</p>	
<p>NOTE: If a SQL statement is invalid, a message displays in the Error Messages box. Correct the error in the SQL</p>	<p>← Read Note</p>

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<p>statement and then click the Check button again.</p>	
<p>NOTE: The Error Messages box under Advanced Designer can also be used to validate Report Designer reports.</p>	<p>← Read Note</p>
<p>6. If you want to define a width for the field, rather than having the application automatically assign a width, enter the width into the Width field under Selected Report Fields.</p>	
<p>7. When finished, click the Save button to save your Custom Report.</p>	
<p>NOTE: Saved Custom Reports are listed under Manage Saved Reports from where they can be Printed, Edited, Deleted, or Exported, as needed.</p>	<p>← Read Note</p>
<p>B. Preview and print from Advanced Designer.</p>	
<p>1. To preview and print your report, click the Preview button, and then click the Print Report button on the Preview screen.</p>	
<p>2. To print your report without previewing, click the Print button on the Custom Reports screen.</p>	
<p>NOTE: You can Preview and Print your report before or after you save it. You do not have to save your report.</p>	<p>← Read Note</p>
<p>C. Review components of a valid SQL statement.</p>	
<p>1. 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:</p>	
<p>a. SELECT clause – identifies the data.</p>	
<p>b. FROM clause – identifies the table.</p>	
<p>c. WHERE clause – limits the data that the SELECT statement returns.</p>	
<p>d. GROUP BY – organizes data into sets e. COUNT(*) – gives a summary value per set (e.g.: 209 Resource List).</p>	
<p>2. The following is a list of some best practices to follow when constructing SQL statements:</p>	
<p>a. KEYWORDS – in uppercase.</p>	

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<ul style="list-style-type: none"> b. All other words – in lowercase. c. Clauses – each clause on a separate line. d. Complex WHERE clause – can be separated onto multiple lines. e. Minimum requirement – a valid SQL statement must have at least a SELECT and a FROM clause. 	
<p>DISCUSS THE REQUIREMENTS FOR CONSTRUCTING A VALID SQL STATEMENT. HAVE THE STUDENTS PRACTICE DESIGNING REPORTS IN “ADVANCED DESIGNER.”</p>	<p>← Instructor Comment</p>
<p>REVIEW UNIT OBJECTIVES.</p>	<p>← Instructor Comment</p>

DETAILED LESSON OUTLINE

COURSE:	I-Suite
UNIT:	9.3 – Custom Reports: Manage Saved Reports
SUGGESTED TIME:	20 minutes
TRAINING AIDS:	Computer projector, screen, computer (one for instructor and one per trainee).
OBJECTIVES:	Upon completion of this unit, the trainee will be able to: <ol style="list-style-type: none">1. Preview/Print saved custom reports.2. Edit saved custom reports.3. Copy saved custom reports.4. Delete saved custom reports.5. Export saved custom reports.6. Import saved custom reports.

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INTRODUCE THE UNIT.	← Instructor Comment
PRESENT UNIT OBJECTIVES.	
I. MANAGE SAVED REPORTS	9.0-06-ISUITE-EP
A. Preview/Print saved custom reports.	
B. Edit saved custom reports.	
C. Copy saved custom reports.	
D. Delete saved custom reports.	
E. Export saved custom reports.	
F. Import saved custom reports.	
II. PREVIEW/PRINT CUSTOM REPORTS	
A. To preview or print saved custom reports:	
1. Open Custom Reports . Then click the Manage Saved Reports tab.	
2. Under Filters , click to check or uncheck the following checkboxes to identify the reports to include in the Saved Reports grid:	
<ul style="list-style-type: none"> • My Reports - When this checkbox is checked, the Saved Reports grid includes all of the custom reports that you created. 	
<ul style="list-style-type: none"> • 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. 	
3. Under Saved Reports , click to select the report you want to preview or print.	
4. Click the Preview button to preview the report. Click the Print button to print the report.	
III. EDIT CUSTOM REPORTS	
NOTE: Only the user who originally created the report can make changes to it.	← Read Note
A. To edit saved custom reports.	
1. Open Custom Reports . Then click the Manage Saved Reports tab.	
2. Under Filters , click to check My Reports . Uncheck	

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<p>User Reports.</p> <p>NOTE: By unchecking User Reports, only those reports you can edit will display in the Saved Reports grid.</p> <ol style="list-style-type: none"> 3. Under Saved Reports, click to select the report you want to edit. Then click the Edit button. 4. Edit the report, as needed. Then click the Save button. 	<p>← Read Note</p>
<p>IV. COPY CUSTOM REPORTS</p> <p>NOTE: Users that did not create the original custom report can still copy it to create a new report.</p> <p>A. To copy a saved custom report:</p> <ol style="list-style-type: none"> 1. Open Custom Reports. Then click the Manage Saved Reports tab. 2. Under Filters, click to check or uncheck the following checkboxes to identify the reports to include in the Saved Reports grid: <ul style="list-style-type: none"> • 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. 3. Under Saved Reports, click to select the report you want to copy. 4. Click the Copy button. 5. 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. 6. Make the appropriate changes to the copied report. 7. In the Report Title box, enter a unique title for the report. 8. Click the Save button to save the report. 	<p>← Read Note</p>
<p>V. DELETE CUSTOM REPORTS</p> <p>NOTE: Only the user who originally created the report or an</p>	<p>← Read Note</p>

administrator can delete it.

A. To delete saved custom reports:

1. Open **Custom Reports**. Then click the **Manage Saved Reports** tab.
2. Under **Filters**, click to check **My reports**. Uncheck **User Reports**.

NOTE: By unchecking **User Reports**, only those reports you can delete will display in the **Saved Reports** grid. ← **Read Note**

3. Under **Saved Reports**, click the report you want to delete. Then click the **Delete** button.
4. When the delete confirmation message displays, click **Yes** to confirm deletion of the custom report.

VI. EXPORT/IMPORT CUSTOM REPORTS

A. To export saved custom reports:

1. Open **Custom Reports**. Then click the **Manage Saved Reports** tab.
2. 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.
3. Under **Saved Reports**, click the report you want to export. Then click the **Export** button.
4. On the **I-Suite Custom Reports Export** window, browse to the folder where you want to save the exported report. Then click the **Save** button.

B. To import saved custom reports.

1. Open **Custom Reports**. Then click the **Manage Saved Reports** tab.
2. Under **Saved Reports**, click the **Import** button.
3. On the **I-Suite Custom Reports Import** window,

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<p>browse to the location of the saved custom report. Click to select the report you want to import. Then click the Open button.</p> <p>REVIEW UNIT OBJECTIVES.</p>	<p>← Instructor Comment</p>