



UNIT 9

I-Suite Custom Reports

01/28/2010

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STUDENT MANUAL

COURSE:	I-Suite
UNIT:	9.0 – Custom Reports: Overview.
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.

I. CUSTOM REPORTS

A. Identify the purpose of Custom Reports.

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.

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.

II. BASIC FEATURES

A. Identify the basic features of the Custom Reports window.

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.

NOTE: The data views that are available in both designers are based on the **Rights** associated with your **User ID**.

3. **Manage Saved Reports** - Print, preview, edit, delete, export and import saved Custom Reports.

STUDENT MANUAL

- COURSE: I-Suite
- UNIT: 9.1 – Custom Reports: Report Designer.
- OBJECTIVES: Upon completion of this unit, the trainee will be able to:
1. Design Custom Reports using Report Designer.
 2. Preview and Print from Report Designer.

I. REPORT DESIGNER

- A. Design Custom Reports using Report Designer.
- B. Preview and print from Report Designer.

II. DESIGN CUSTOM REPORTS

A. To design Custom Reports using Report Designer:

1. From the **Reports** drop-down menu, select **Custom Reports**. On the Custom Reports window, click the **Report Designer** tab.
2. From the **Data Views** drop down list, select the **Report Views** you want to use.

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.

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**.
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.

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.

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:
 - a. Single

- b. 1.5 Lines
- c. Double.

12. When finished, click the **Save** button to save your **Custom Report**.

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

B. Preview and print the report in Report Designer.

- 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.

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

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

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	9.2 – Custom Reports: Advanced Designer.
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.

I. ADVANCED DESIGNER

- A. Design Custom Reports using Advanced Designer.
- B. Preview and Print from Advanced Designer.
- C. Define components of a valid SQL statement.

II. DESIGN CUSTOM REPORTS

- A. Design Custom Reports using Advanced Designer.
 - 1. Open **Custom Reports**. Then click the **Advanced Designer** tab.
 - 2. Under **Report Layout**, enter a **Report Title** for your report.

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.

- 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.
- 2. Click one of the following under **Report Layout** to identify the line spacing to use in the report:
 - a. Single
 - b. 1.5 Lines
 - c. Double.
- 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**.
- 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**.

NOTE: If a SQL statement is invalid, a message displays in the **Error Messages** box. Correct the error in the SQL statement and then click the **Check** button again.

NOTE: The **Error Messages** box under **Advanced Designer** can also be used to validate **Report Designer** reports.

- 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**.
- 7. When finished, click the **Save** button to save your **Custom Report**.

NOTE: Saved Custom Reports are listed under **Manage Saved Reports** from where they can

be Printed, Edited, Deleted, or Exported, as needed.

B. Preview and print from Advanced Designer.

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.

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

C. Review components of a valid SQL statement.

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:
 - a. **SELECT** clause – identifies the data.
 - b. **FROM** clause – identifies the table.
 - c. **WHERE** clause – limits the data that the **SELECT** statement returns.
 - d. **GROUP BY** – organizes data into sets e. **COUNT(*)** – gives a summary value per set (e.g.: 209 Resource List).
2. The following is a list of some best practices to follow when constructing SQL statements:
 - a. **KEYWORDS** – in uppercase.
 - 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.

STUDENT MANUAL

COURSE:	I-Suite
UNIT:	9.3 – Custom Reports: Manage Saved Reports
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.

I. MANAGE SAVED REPORTS

- 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:
 - **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 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.

- 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 **User Reports**.

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

- 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.

IV. COPY CUSTOM REPORTS

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

report.

A. To copy a saved custom report:

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 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.

V. DELETE CUSTOM REPORTS

NOTE: Only the user who originally created the report or an 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.

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, browse to the location of the saved custom report. Click to select the report you want to import. Then click the **Open** button.