



UNIT 9

I-Suite Custom Reports

5/3/2013

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.

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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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INTRODUCE THE UNIT.

← Instructor Comment

PRESENT UNIT OBJECTIVES.

I. REPORT DESIGNER

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

II. DESIGN CUSTOM REPORTS

9.0-03-ISUITE-EP

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.

← Read Note

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

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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.

← **Read Note**

- 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**.

← **Read Note**

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.

9.0-04-ISUITE-EP

- 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.

← **Read Note**

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

← **Read Note**

REVIEW UNIT OBJECTIVES.

← **Instructor Comment**

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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INTRODUCE THE UNIT.

← Instructor Comments

PRESENT UNIT OBJECTIVES.

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

9.0-05-ISUITE-EP

- 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.

← Read Note

- 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

← Read Note

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.

← Read Note

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.

← Read Note

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.

← Read Note

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.

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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:
 - **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.

← 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 **User Reports**.

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

← Read Note

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.

← Read Note

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.

← Read Note

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.

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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.

REVIEW UNIT OBJECTIVES.

← **Instructor Comment**

ERROR: undefined
OFFENDING COMMAND:

STACK: