CUSTOM REPORTS

Version 1.2.2

Wednesday, December 14, 2016

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Custom Reports

The definition of a Custom Report is a report that was not included in any area within e-ISuite (i.e., not a standard report in the system). Users may have a need to create a report that is specific to the Incident that is being managed. The Custom Reports function fills this need.

NOTE: Any user who has the Check-In/Demob, IAP, Time, Cost, Training Specialist, or Data Steward role can create Custom Report Templates.

Custom Reports allows the user to create both simple and advanced reports. A simple report will not have advanced constraints and filters. An advanced report will use filters and constraints to identify the specific data to include in the report.

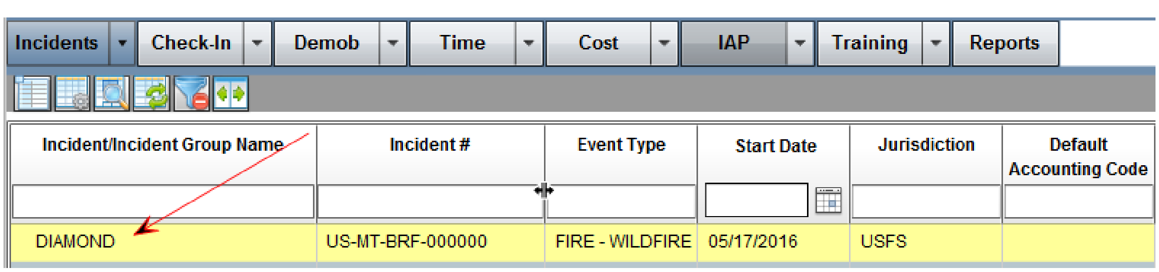
NOTE: In Site, the data the system includes in the report will be based on the Incident selected (or all Incidents in the database) if the Site Group is selected.

NOTE: In Enterprise, the data the system includes in the report is based on the Incident or Incident Group that is selected. If a single Incident outside of an Incident Group is selected, the report will include data for that Incident only. If an Incident Group is selected, the report will include data for all incidents in that Incident Group. However, if a single Incident within an Incident Group is selected, the report will include data for only that Incident.

Follow the steps in this section to create custom reports:

1. From the Home page, select the **Incidents** button.

2. Select an Incident.



3. Click **Reports** on the main toolbar.

4. Select the **Custom** tab from the toolbar. The Manage Reports screen displays with a list of existing Custom Reports.

Add a Custom Report

Report Information

1. From the toolbar select the **Add Report** button.

2. Select the **Report Information** tab.

3. Select a view from the **Available Views** drop-down menu.

NOTE: Select a view for the custom report. Once a view is selected, columns can be added to a custom report.

View/Role	Data Steward	Check-in/Demob	IAP	Time	Cost	TNSP
Item Code	X	X	X	X	X	
Jetports	X	X	X	X	X	
Person-Plans	X	X	X	X	X	
Person-Time	X			X		
Persons-Post	X			X		
Resources-Cost	X				X	
Resources-Cost Rate	X				X	
Resources-Plans	X	X	X	X	X	
Resources-Time	X			X		
Trainee Data	X					X
Unit Id	X	X	X	X	X	

4. Enter a title for the custom report in the **Report Title** field.

5. Enter a Sub Title for the custom report in the **Sub Title** field.

6. To change the orientation to **Portrait**, uncheck the **Landscape** checkbox. The default orientation for the custom report is Landscape.

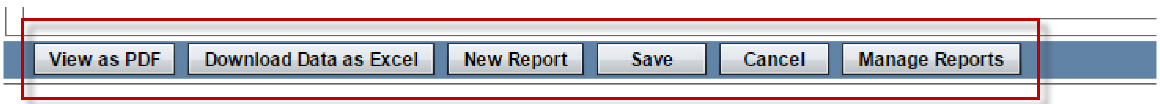
7. Select the Line Spacing for the custom report by selecting the **Single**, **One and Half** or **Double** radio buttons. The default line spacing for the custom report is single.

8. Enter a description of the custom report in the **Description** box.

9. To keep a custom report template private (only the user who created the report template can see or use it) select the **Private** radio button. To make the report available to other users in the e-ISuite system, click the **Public** radio button.

NOTE: When a custom report template is made public, any user with access to the selected incident or incident group can use that template to create reports. If a user who did not create the template attempts to make changes to the template, the system will require the user to save the template as a new report template.

NOTE: If the user clicks on the Save button and has defined Report information but has not selected any columns on the Column Builder tab, an error message will display indicating that at least one column must be defined before saving the custom report.



Column Builder

1. Select the **Column Builder** tab to add columns to the custom report.

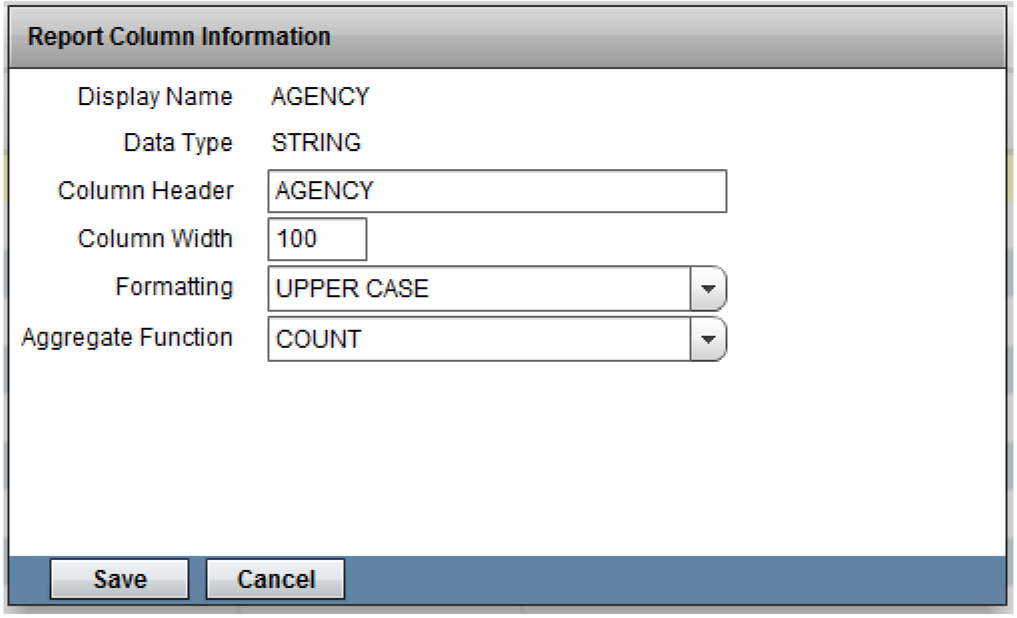
NOTE: Select a view on the Report Information tab before accessing the Column Builder tab. If a view is not selected, the system will not display any columns for selection on the Column Builder tab.

2. Identify the columns to include on the report by selecting the column from the **Select Columns** list on the left and using the shuttle box to move the columns to the **Report Columns** grid on the right.

3. To change the order of the column's in the **Report Columns** grid, select the column from the grid and use the **Up** and **Down** buttons to move the selected column into the desired order.

NOTE: The order in which the columns display in the Report Columns grid is the same order in which they will print on the report

4. To edit a column's Column Header, Column Width, Formatting or Aggregate Function, select the Report Column in the grid and click the **Edit** button. The Report Column Information window displays.



   a. To change the name of the column header that will display on the report, enter a new header in the **Column Header** field.

   b. To change the width of a column, enter a new width into the **Column Width** field.

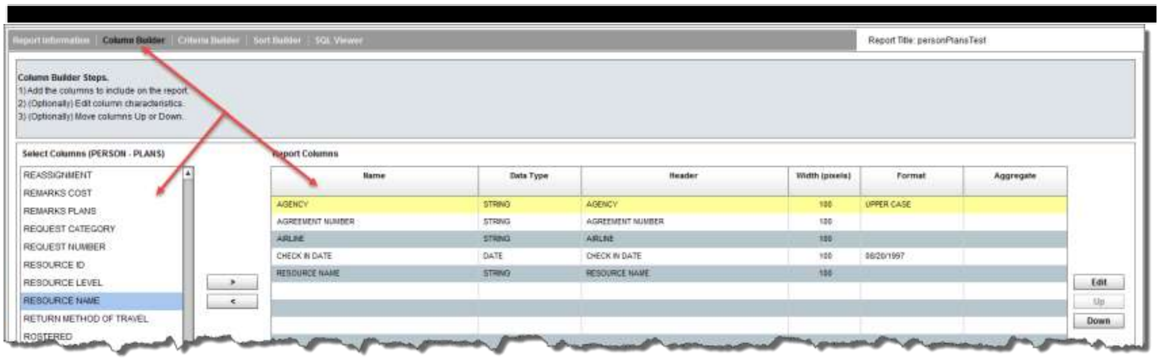
NOTE: The default column width is 100 pixels. 7 pixels is approximately 1 character.

   c. To identify the case to use for the text in the column, select an option from the **Formatting** drop-down list. The available options include: Upper Case, Lower Case, and Title Case.

   d. To add an aggregate function to a column, select the function from the **Aggregate Function** drop-down list. Aggregate options can include: Average, Count, Maximum, Minimum, Standard Deviation and Sum and Variance.

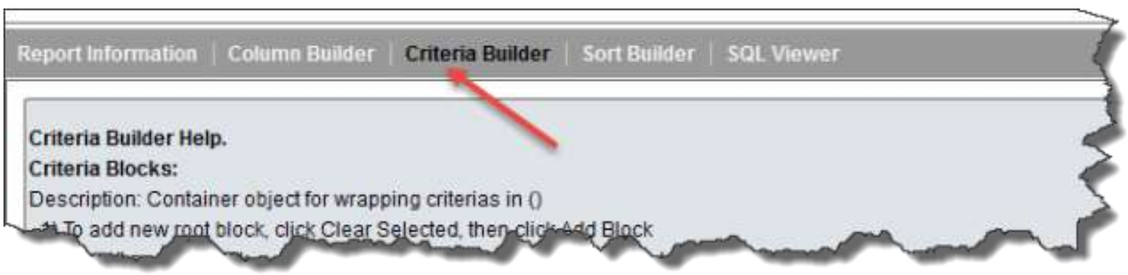
NOTE: The options that display in the Aggregate Function list depend on the data in the column.

5. Click **Save** to save any changes made and close the window.



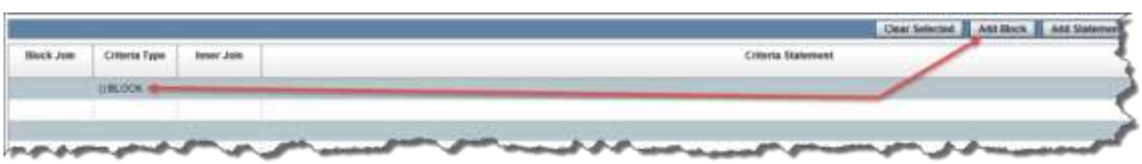
Criteria Builder

1. Select the **Criteria Builder** tab.



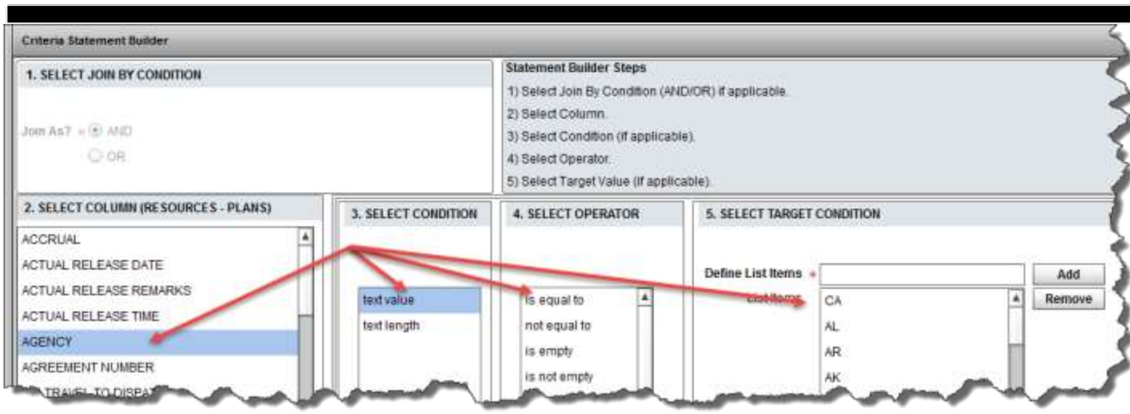
2. Click the **Add Block** button to add a block to the report.

NOTE: A block must exist before adding any statements to the custom report. All statements are contained within a block.



3. Select the block in the grid.

4. Click the **Add Statement** button. A Criteria Statement Builder screen opens when you click this button.



5. Under **Select Column**, select a column to which criteria will be added.

6. Under **Select Condition**, select the condition to apply to the column (e.g., mm/dd/yy, text value, etc.).

NOTE: The conditions that are available are based on the column that is selected.

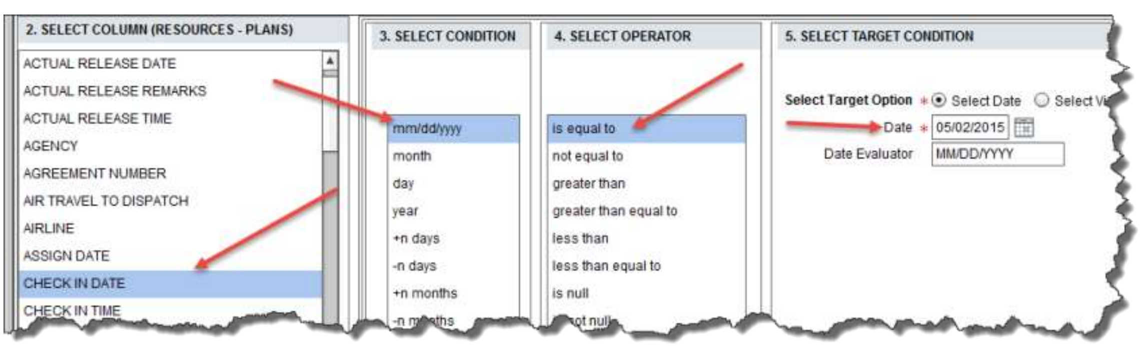
7. Under **Select Operator** select an operator for the condition (e.g., is equal to, not equal to, starts with, ends with, etc.)

NOTE: The operators that are available are based on the condition that is selected.

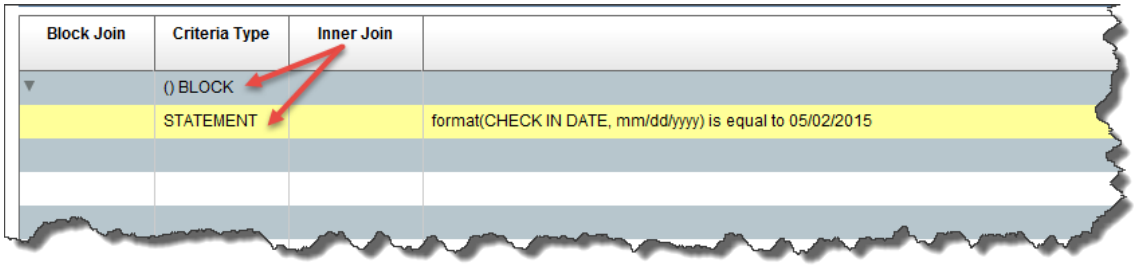
8. Under **Select Target Condition**, enter the value that the data must meet in order to match the criteria. Only data that meets the defined criteria will be included in the report. (e.g., Data, Value, etc.)

EXAMPLE:

To select the Check-In Date from the columns, select the "mm/dd/yyyy" condition. Then select the "is equal to" operator. The target condition could be 05/02/2015. So the check-in date must equal 05/02/2015 in order to be included in the Custom Report.

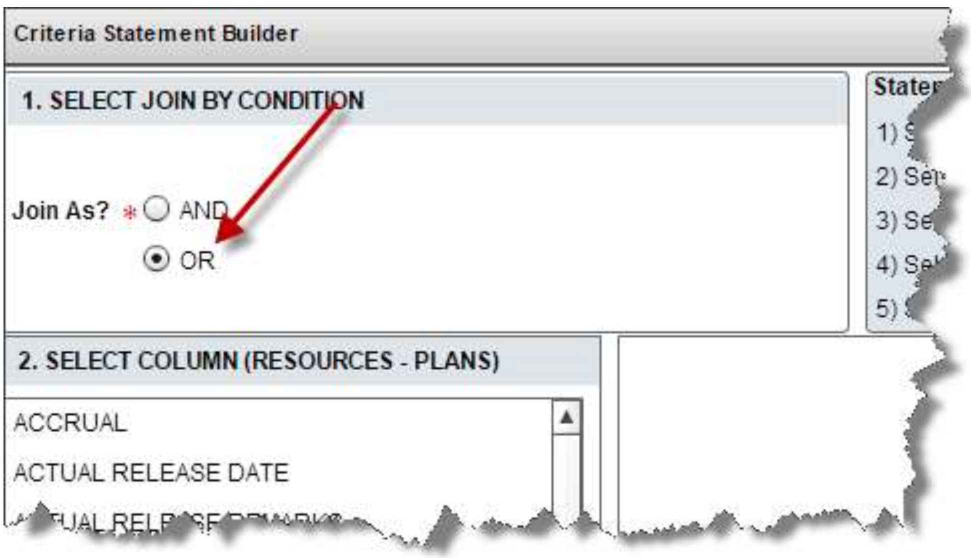


9. Click the **Accept** button to add the criteria to the report.

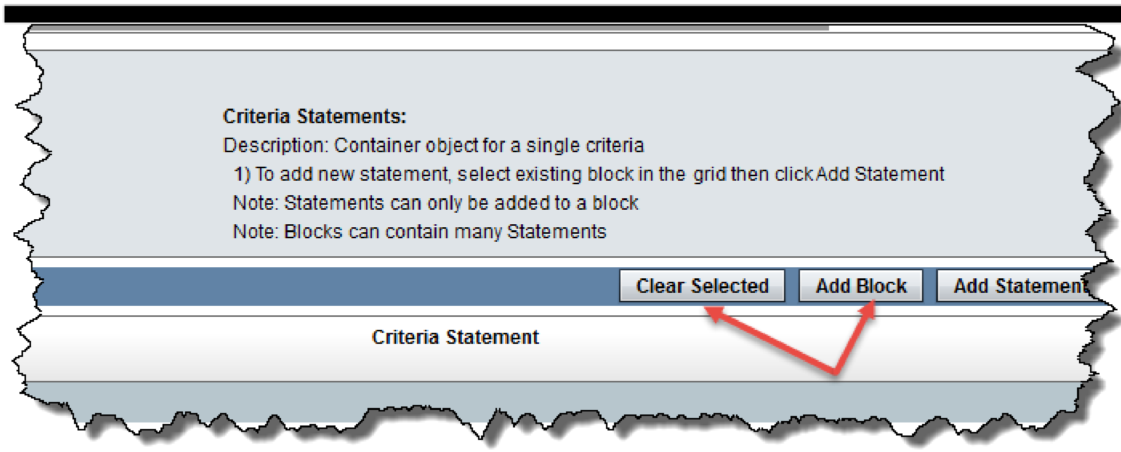


10. To add a second criteria statement to the same block, make sure that block is selected and click the **Add Statement** again.

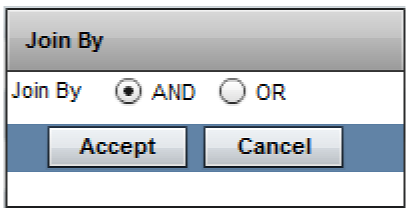
11. Under **Select Join By Condition** on the Criteria Statement Builder, identify whether the statement uses an AND or OR condition (e.g., the date is equal to 05/02/2015 OR 05/03/2015.



12. To add an additional criteria block to the custom report, click the **Clear Selected** button and then the **Add Block** button.

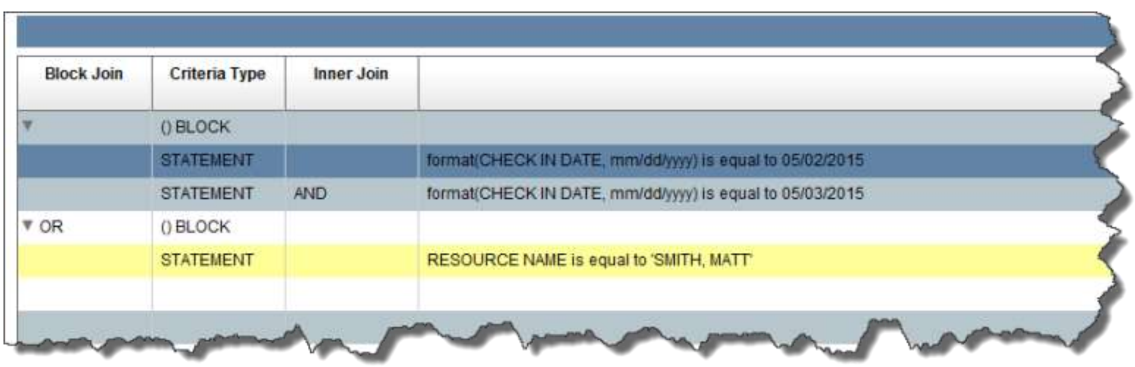


13. When the **Join By** window displays, indicate whether the block will be joined to the other block with an AND or an OR.



EXAMPLE

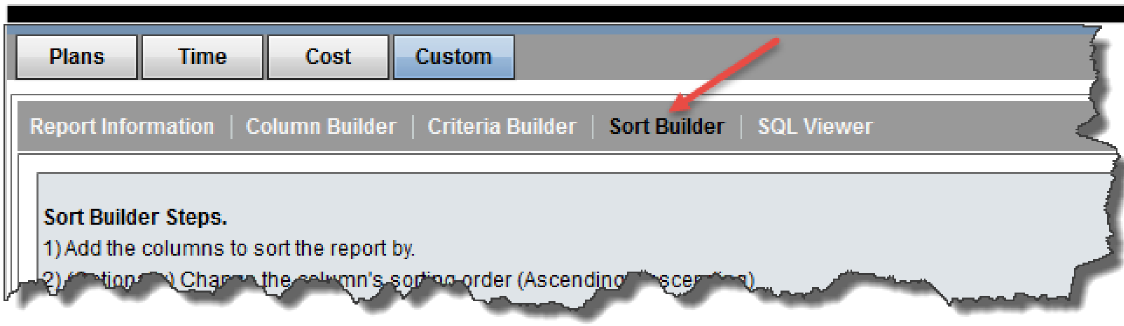
Add a new block with an OR join. Add a statement to the new block that the Resource Name is equal to Smith, Matt.



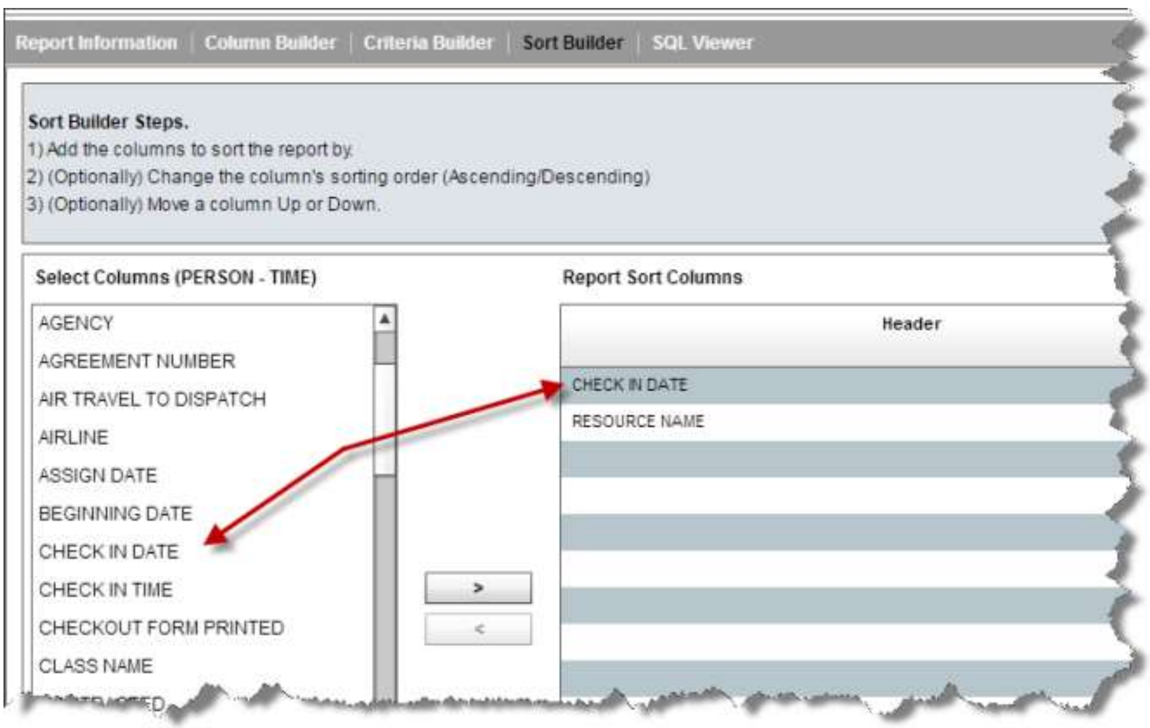
NOTE: To view the SQL statement that is created from the criteria added to the report, click the SQL Viewer tab. (See the SQL Viewer tab section for more information)

Sort Builder

1. To add sort criteria to the custom report, select the **Sort Builder** tab.



2. Select the columns to include on the report by clicking on the appropriate Column from the table on the left and using the shuttle box moving the column to the Report Sort Columns grid on the right.



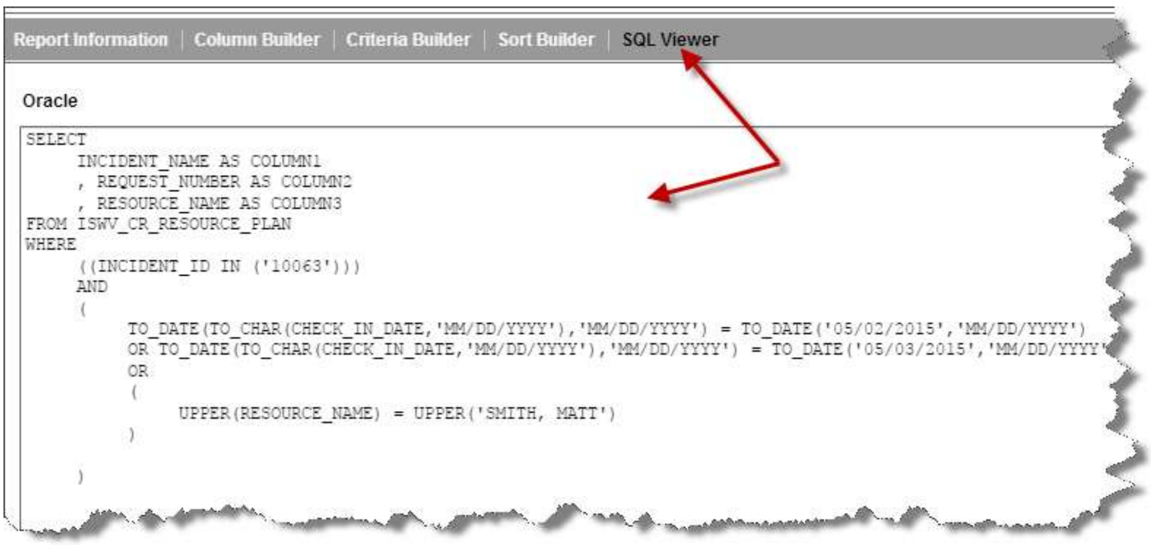
3. To change the order of the Columns in the Report Sort Columns grid, select the column from the grid and use the **Toggle Sort**, **Up** or **Down** buttons to move the selected column into the desired order.

SQL Viewer

1. To view the SQL statement that was created as the criteria was added to the custom report, select the **SQL Viewer tab**.

NOTE: The report must have a view and at least one column selected before the system will display the SQL statement

2. The SQL Viewer tab allows the user to see the SQL statements which were used by the system to create a report. The user can see if the blocks and statements are nested properly, so the proper report results will be achieved.



Generating the Custom Report

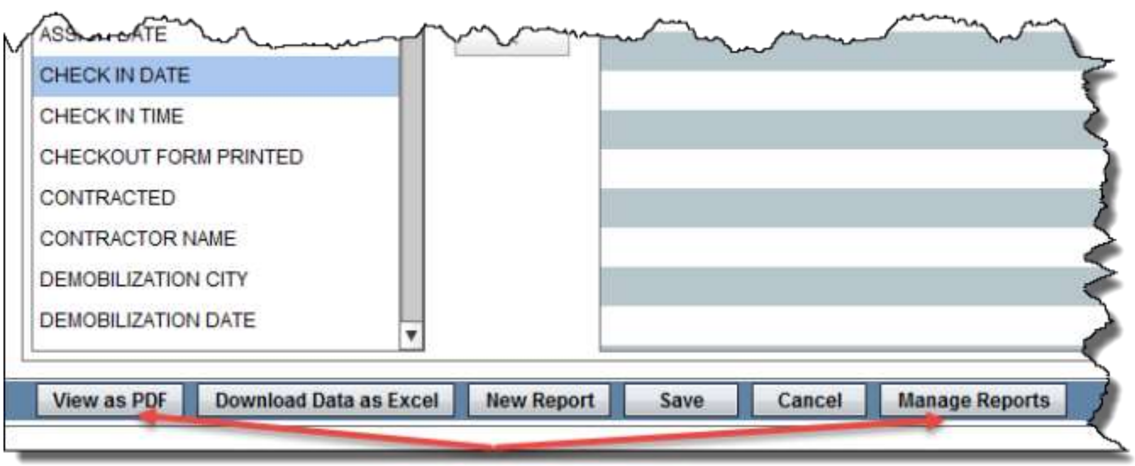
1. To view the report as a PDF, click the **View as PDF** button.

NOTE: The report must have a view selected and at least one column in order to View as PDF.

2. To download the report data as Excel, click the **Download Data as Excel** button.

NOTE: The report must have a view selected and at least one column in order to download data as Excel.

3. To create a new custom report, click the **New Report** button.
4. To save the Custom Report, click the **Save** button.
5. To cancel the Custom Report without saving, click the **Cancel** button.
6. To return to the Custom Reports report listing, click the **Manage Reports** button.



Managing Custom Report Templates

1. Click **Reports** on the main toolbar.
2. Select the **Custom** tab from the toolbar.
3. A listing of all existing custom report templates display in the grid.

4. If desired, filter the list of custom report templates by entering filter criteria in the field above the grid columns.

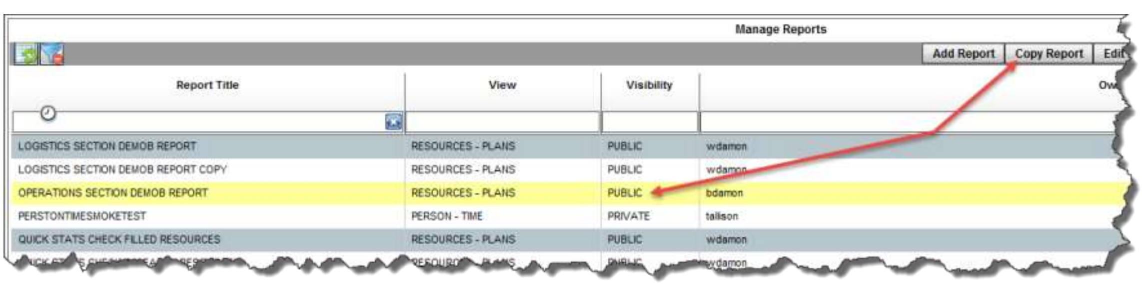
NOTE: A user can open any private custom report templates that belong to that user.

NOTE: A user can open any public custom report template to which they have access, based on their roles.

NOTE: If the user does not have access to the view that was used to create the custom report, they cannot access that custom report if it was made public. For example, a user with the Check-In Demob role would not have access to a custom report that was made with the Time view.

Copy a Custom Report Template

1. To create a copy of any custom report template to which a user has, select the custom report template from the grid.
2. Click the **Copy Report** button.
3. The Report Information tab displays.



4. If desired, enter a unique name for the Report in the **Report Title** field.

Edit a Custom Report Template

1. To edit any custom report to which the user has access, select the custom report template in the grid.
2. Click the **Edit Report** button.
3. The **Report Information** tab displays.
4. If desired, make any changes to the Custom Report template.

NOTE: If the view for the custom report template is changed, the system will clear out all of the columns and criteria for the report.

NOTE: Changes to all elements of a custom report template (e.g., columns, constraints and filters, sorts, aggregates, layout, etc.) are available for editing.

Delete a Custom Report Template

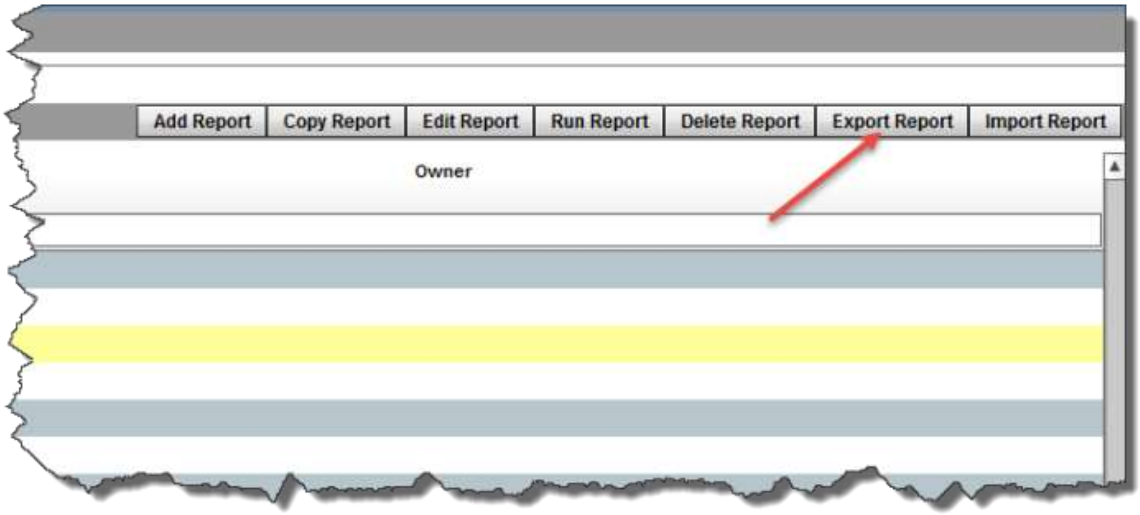
1. To delete any custom report templates that have been created, select the custom report template from the grid.
2. Click the **Delete Report** button.
3. A confirmation message displays.
4. Click **Yes** to remove the Custom Report.
5. Optionally, click **No** to cancel.

NOTE: The user cannot delete any public custom report templates they did not create.

Export a Custom Report Template

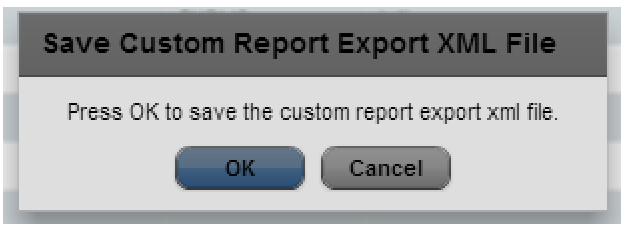
1. To export any custom report template to which a user has access, select the custom report template in the grid.

2. Click the **Export Report** button.

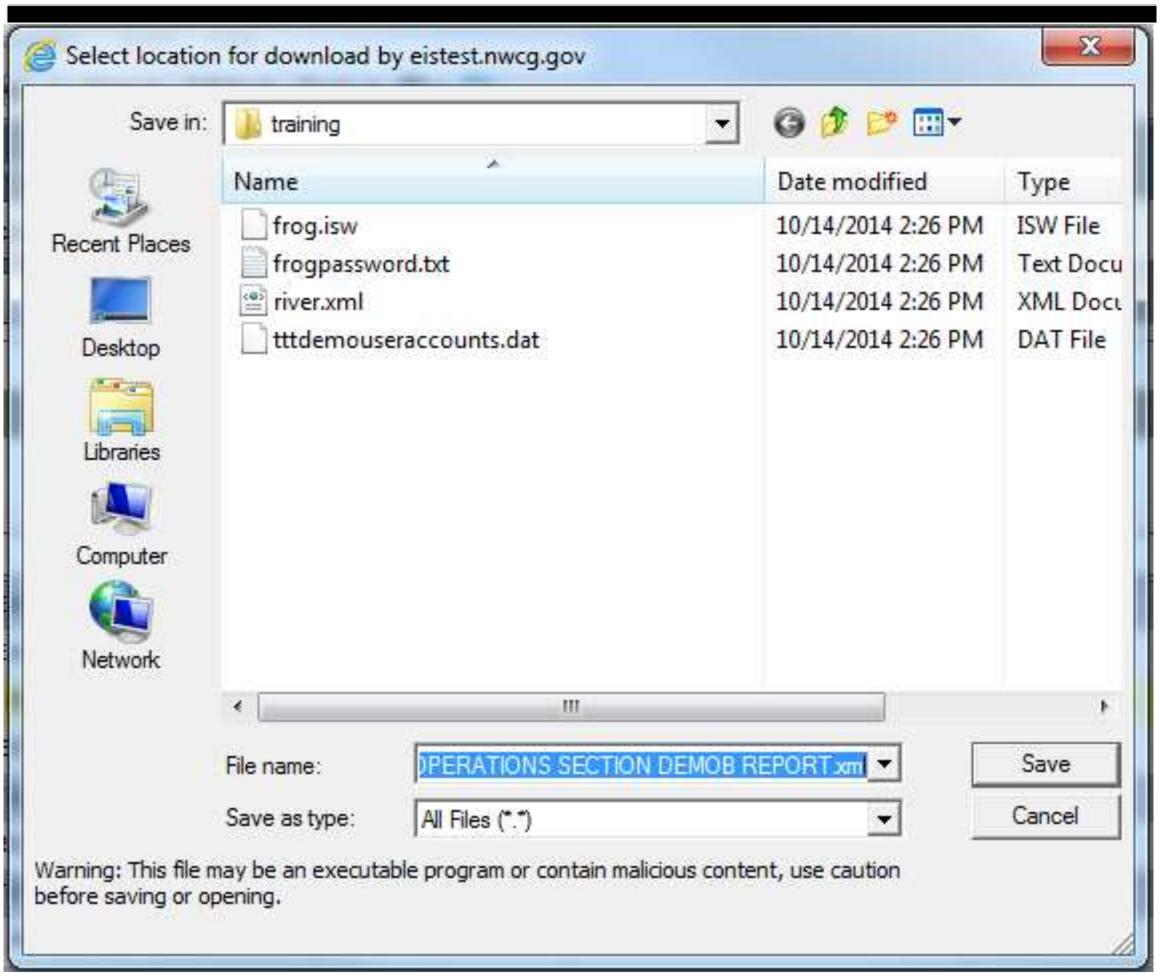


3. When the **Save Custom Report Export XML File** window displays.

4. Click the **OK** button to save the custom report xml file.



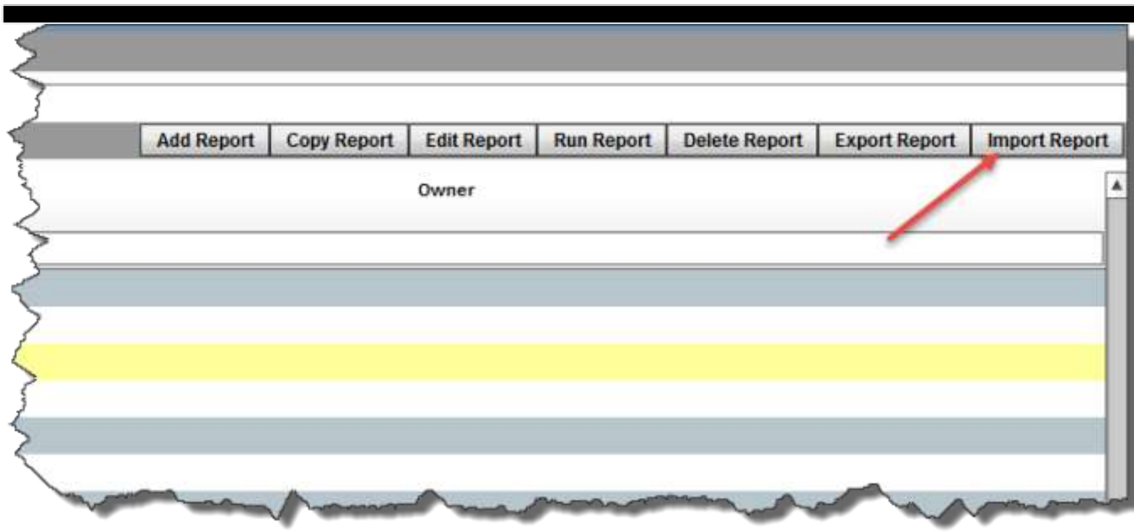
5. In the window that displays, navigate to the folder where the exported report should be saved.



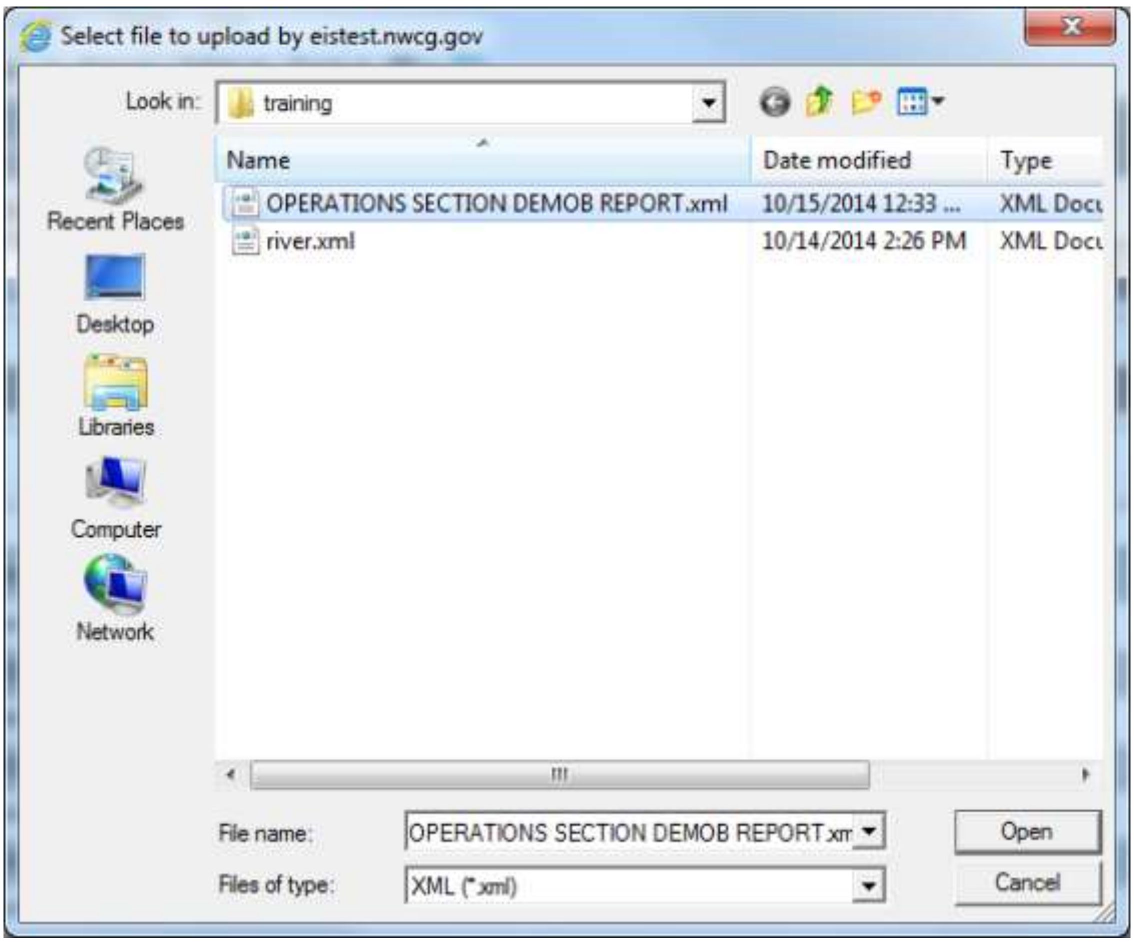
6. Click the **Save** button to export the report.

Import a Custom Report Template

1. To import an exported custom report template click the **Import Report** button.



2. The **Select file to upload** window displays.



3. Navigate to the location where the Custom Report Template xml file is located.

4. Select the appropriate xml file.
5. Select the **Open** button to import the custom report.

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