



# CUSTOM REPORTS

**Version 2.0.1**

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# Custom Reports

## 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.

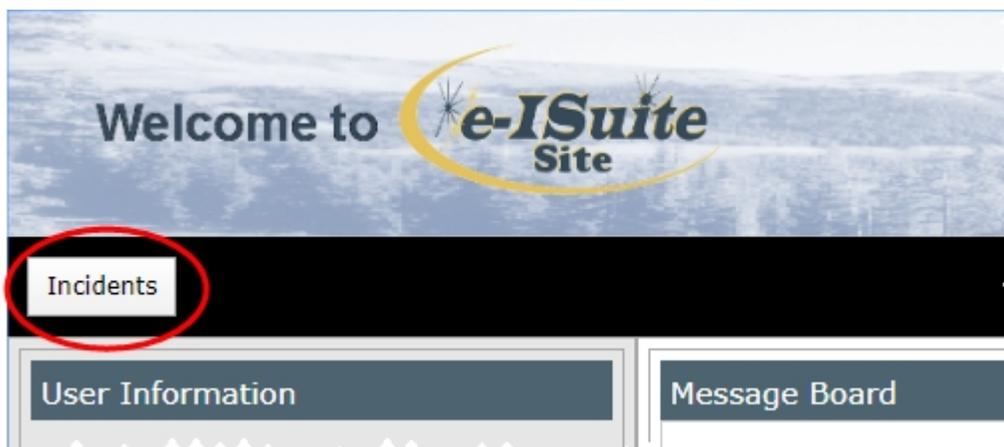
Custom Reports allows the user to create both simple and advanced reports. A simple report will not have advanced constraints and filters. An advanced report will use filters and constraints to identify the specific data to include in the report.

**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.



# Custom Reports

Incidents	Check-In	Demob	Time	Cost
Incident Name ↑   Incident #   Event Type				
HOPE_VALLEY				
BLUE LAKE	US-WA-ABDN-389283	FIRE - WILDFIRE		
FLAMINGO ROW	US-WA-ABDN-389833	FIRE - WILDFIRE		
GREEN LAKE	US-WA-ABDN-2389832	FIRE - WILDFIRE		
HOPE VALLEY	US-WA-ABDN-8978888	FIRE - WILDFIRE		
HOT VALLEY	US-WA-ABDN-3892898	FIRE - WILDFIRE		
LAKE WOEBEGONE	US-WA-ABDN-2839893	FIRE - WILDFIRE		
MAGNOLIA VALLEY	US-GA-AESR-389238	FIRE - WILDFIRE		
RED LAKE	US-WA-ABDN-387283795	FIRE - WILDFIRE		
SCHAFFFR	IS-CA-SOE-001317	FIRE - WILDFIRE		

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.

Incidents	Check-In	Demob	Time	Cost	IAP	Training	Reports
Plans Reports	Time Reports	Cost Reports	Training Specialist Reports	Custom Reports			
Manage Reports							
Report Title	View	Visibility					
PERSON PLANS TEST	PERSON - PLANS	PRIVATE					
PERSON PLANS TEST COPY	PERSON - PLANS	PRIVATE					
PERSON PLANS TESTING	PERSON - PLANS	PRIVATE					
PERSONPI ANS TESTING SAVE	PERSON - PI ANS	PRIVATE					

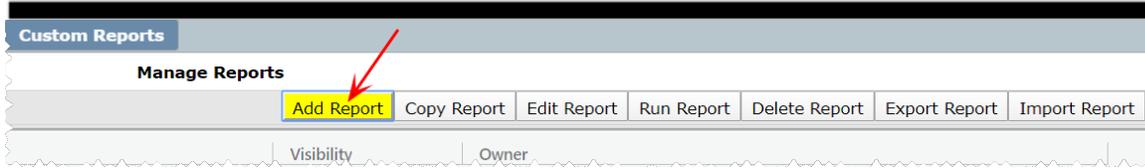
## Add a Custom Report

### Report Information

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



# Custom Reports



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.

The following table identifies the views available for each role:

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 subtitle 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** option. To make the report available to other users in the e-ISuite system, click the **Public** option.



# Custom Reports

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 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.

Report Information | Column Builder | Criteria Builder | Sort Builder | SQL Viewer

Select the View for the report. The list of available views is based on user roles.

Available Views \* PERSON - PLANS ▼

Define the characteristics of the report. | Define Visibility/Sharing options for the report.

Report Title \* PERSON PLANS REPORT | Visibility  Public  Private

Sub Title

Landscape

Line Spacing  Single  One and Half  Double

Description  
This report includes Person Plans data for all person resources with a Checked-In (C) Status!

View as PDF | Download Data as Excel | New Report | Save | Cancel | Manage Reports

## Column Builder

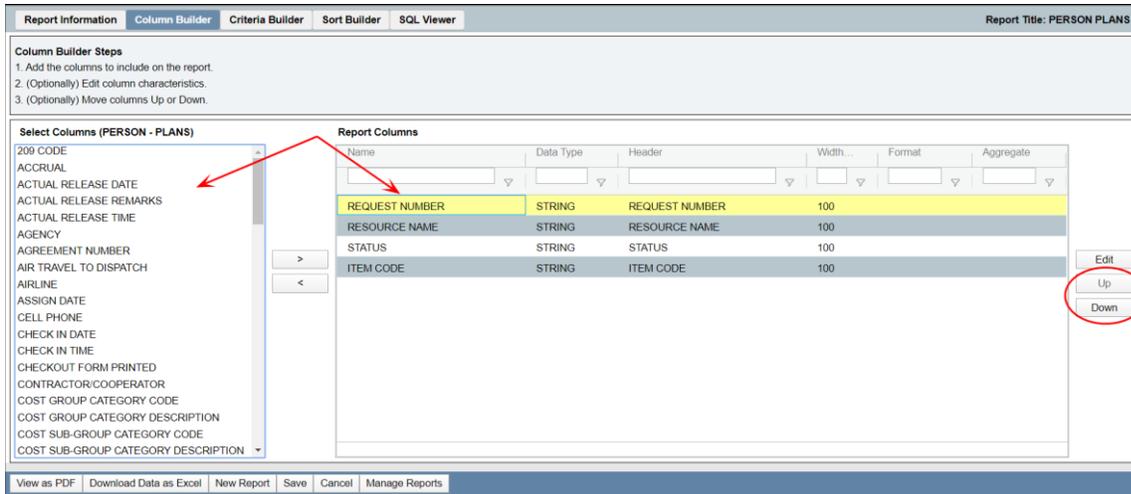
1. Select the **Column Builder** tab to add columns to the custom report.

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 in 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.

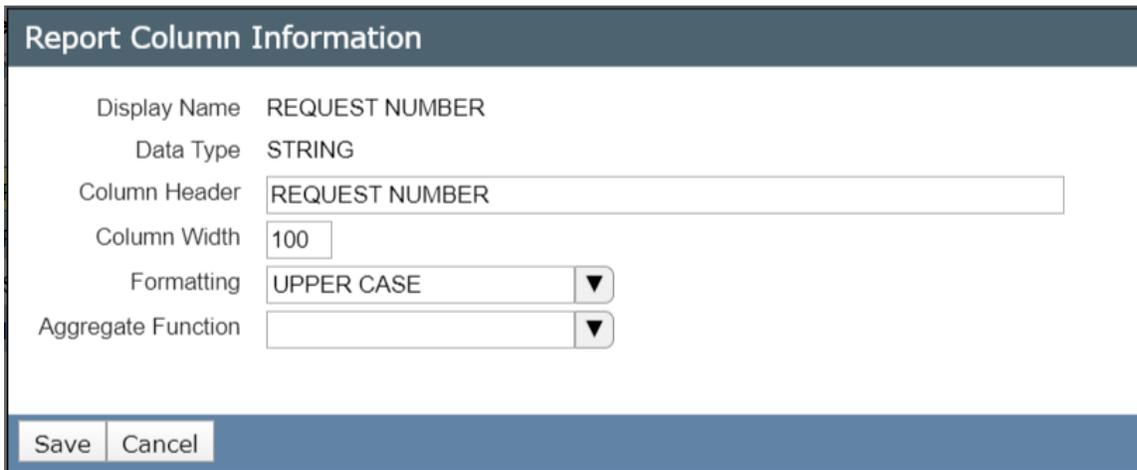
# Custom Reports

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.



# Custom Reports

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

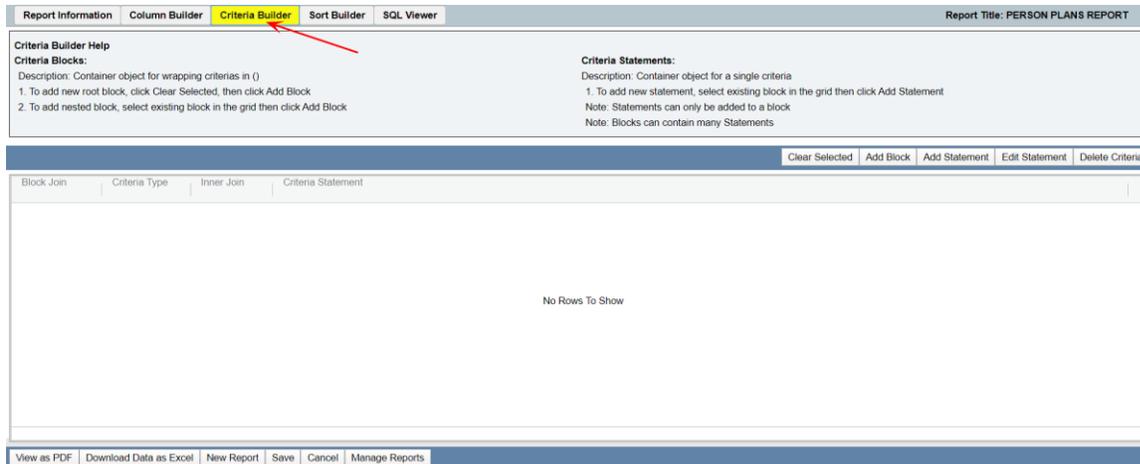
- c. To identify the case to use for the text in the column, select an option from the **Formatting** drop-down list. The available options include: Upper Case, Lower Case, and Title Case.
- d. To add an aggregate function to a column, select the function from the **Aggregate Function** drop-down list. Aggregate options can include: **Average, Count, Maximum, Median, Minimum, Standard Deviation, 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.

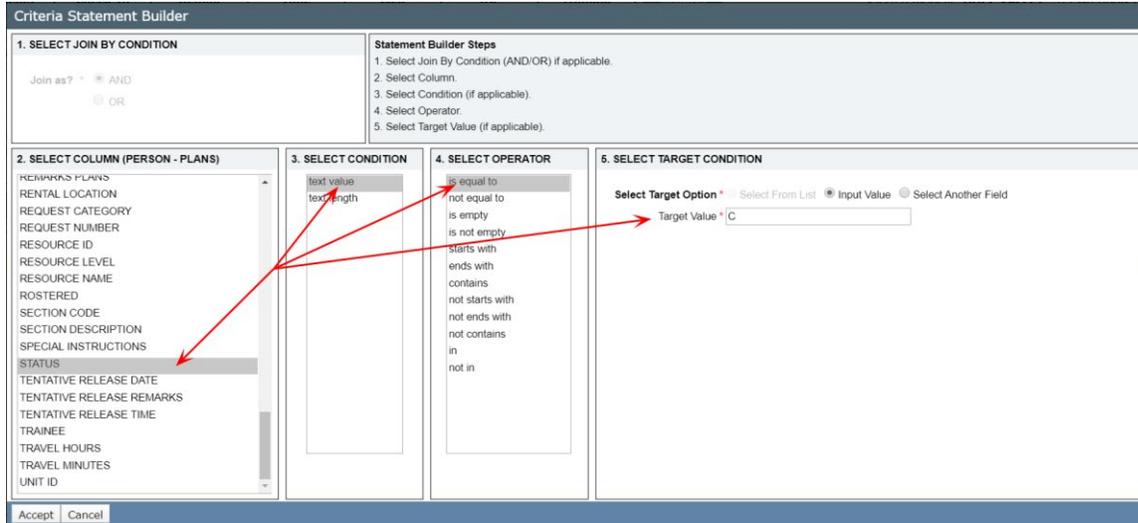


- 2. Click the **Add Block** button to add a block to the report.

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 05/01/2020. So the check-in date must equal 05/01/2020 in order to be included in the Custom Report.



# Custom Reports

Criteria Statement Builder

1. SELECT JOIN BY CONDITION

Join as?  AND  
 OR

Statement Builder Steps

1. Select Join By Condition (AND/OR) if applicable.
2. Select Column.
3. Select Condition (if applicable).
4. Select Operator.
5. Select Target Value (if applicable).

2. SELECT COLUMN (PERSON - PLANS)

CHECK IN DATE  
CHECK IN TIME  
CHECKOUT FORM PRINTED  
CONTRACTOR/COOPERATOR  
COST GROUP CATEGORY CODE  
COST GROUP CATEGORY DESCRIPTION  
COST SUB-GROUP CATEGORY CODE  
COST SUB-GROUP CATEGORY DESCRIPTION  
DAYS LEFT  
DEMOB TRAVEL METHOD  
DEMOBILIZATION CITY  
DEMOBILIZATION DATE  
DEMOBILIZATION STATE  
DISPATCH NOTIFIED OF ACTUAL RELEASE  
DISPATCH NOTIFIED OF TENTATIVE RELEASE  
EMPLOYMENT TYPE  
ESTIMATED ARRIVAL TIME  
ESTIMATED DATE OF ARRIVAL  
FAX NUMBER

3. SELECT CONDITION

mm/dd/yyyy  
month  
day  
year  
+n days  
-n days  
+n months  
-n months

4. SELECT OPERATOR

is equal to  
not equal to  
greater than  
greater than equal to  
less than  
less than equal to  
is null  
is not null  
between

5. SELECT TARGET CONDITION

Select Target Option \*  Select Date  Select View Field  Select Term

Date \* 05/01/2020  
Date Evaluator MM/DD/YYYY

Accept Cancel

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

Block Join	Criteria Type	Inner Join	Criteria Statement
▼	() BLOCK		
	STATEMENT		format(CHECK IN DATE, mm/dd/yyyy) is equal to 05/01/2020

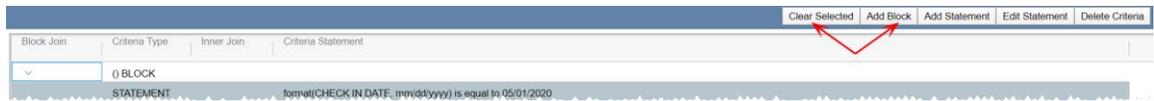
View as PDF Download Data as Excel New Report Save Cancel Manage Reports

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

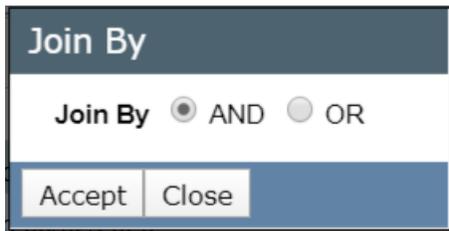
11. Under **Select Join By Condition** on the Criteria Statement Builder, identify whether the statement uses an AND or OR condition (e.g., the date is equal to 05/01/2020 OR 05/02/2020).



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

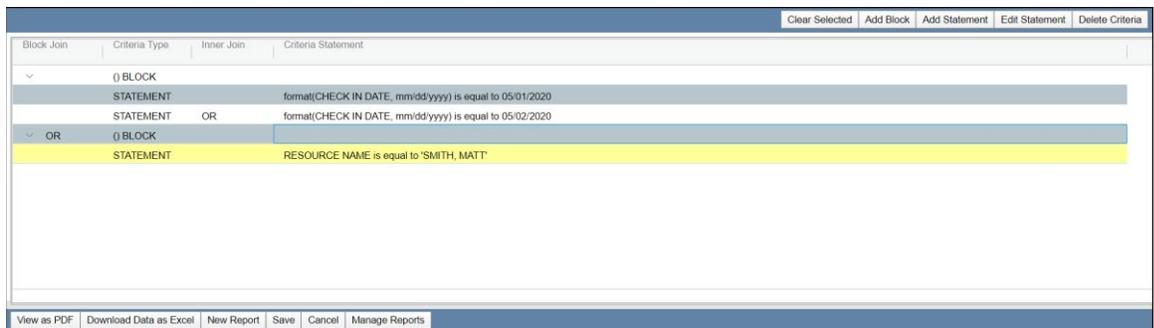


13. When the **Join By** window displays, indicate whether the block will be joined to the other block with an AND or an OR.



## EXAMPLE

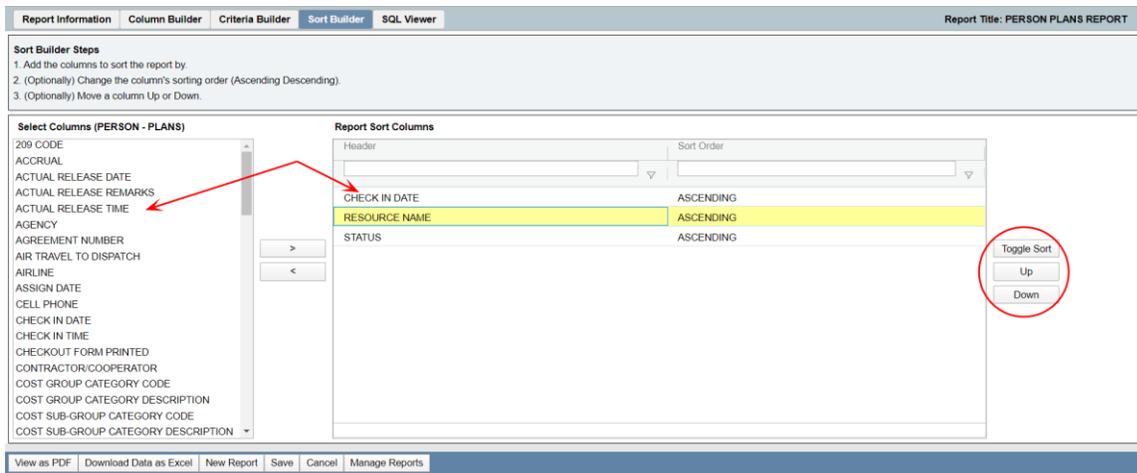
Add a new block with an OR join. Add a statement to the new block that the Resource Name is equal to Smith, Matt.



**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 the appropriate Column in the **Select Columns** table on the left and using the shuttle box to move 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.



# Custom Reports

Report Information | Column Builder | Criteria Builder | Sort Builder | **SQL Viewer** | Report Title: PERSON PLANS REPORT

Postgres

```
SELECT
  REQUEST_NUMBER AS column1
  , RESOURCE_NAME AS column2
  , STATUS AS column3
  , ITEM_CODE AS column4
FROM ISWV_CR_PERSON_PLAN
WHERE
  ((INCIDENT_ID IN ('10007')))
  AND
  (
    to_date(to_char(CHECK_IN_DATE,'MM/DD/YYYY'),'MM/DD/YYYY') = to_date('05/01/2020','MM/DD/YYYY')
    OR to_date(to_char(CHECK_IN_DATE,'MM/DD/YYYY'),'MM/DD/YYYY') = to_date('05/02/2020','MM/DD/YYYY')
  )
  OR
  (
    upper(RESOURCE_NAME) = upper('SMITH, MATT')
  )
ORDER BY
  to_char(CHECK_IN_DATE,'MM/DD/YYYY'),
  RESOURCE_NAME,
  STATUS
```

View as PDF | Download Data as Excel | New Report | Save | Cancel | Manage Reports

## 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.

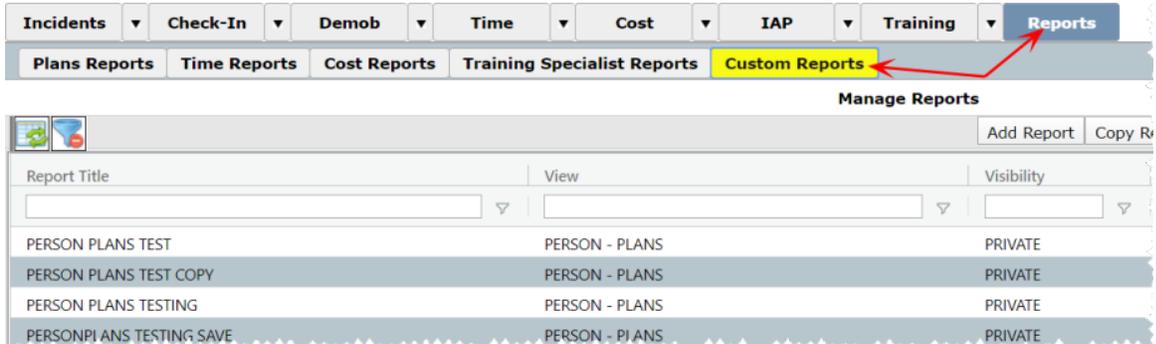
NOTE: A user can open any public custom report template to which they have access, based on their roles.

NOTE: If the user does not have access to the view that was used to create the



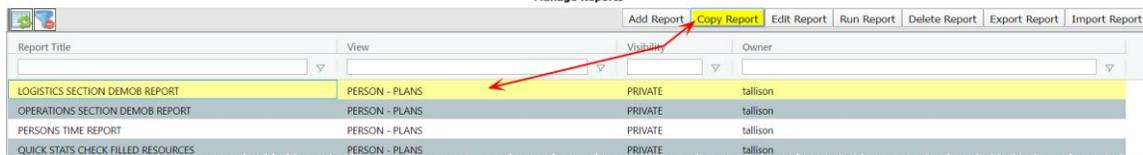
# Custom Reports

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 access, select the custom report template in the grid.
2. Click the **Copy Report** button.
3. The **Report Information** tab displays.



4. Enter a unique name for the copied Report in the **Report Title** field.
5. Click the **Save** button to save the copy of the report.

## 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.



# Custom Reports

4. Make any changes to the Custom Report template and click the **Save** button

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 in the grid.
2. Click the **Delete Report** button.
3. A confirmation message displays.
4. Click **Yes** to remove the Custom Report.

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.

The screenshot shows the 'Manage Reports' interface. At the top, there are several buttons: 'Add Report', 'Copy Report', 'Edit Report', 'Run Report', 'Delete Report', 'Export Report', and 'Import Report'. The 'Export Report' button is highlighted in yellow and has a red arrow pointing to it. Below the buttons is a table with columns for 'Report Title', 'View', 'Visibility', and 'Owner'. The table contains four rows of report data.

Report Title	View	Visibility	Owner
LOGISTICS SECTION DEMOB REPORT	PERSON - PLANS	PRIVATE	tallison
OPERATIONS SECTION DEMOB REPORT	PERSON - PLANS	PRIVATE	tallison
PERSONS TIME REPORT	PERSON - PLANS	PRIVATE	tallison
QUICK STATS CHECK FILLED RESOURCES	PERSON - PLANS	PRIVATE	tallison

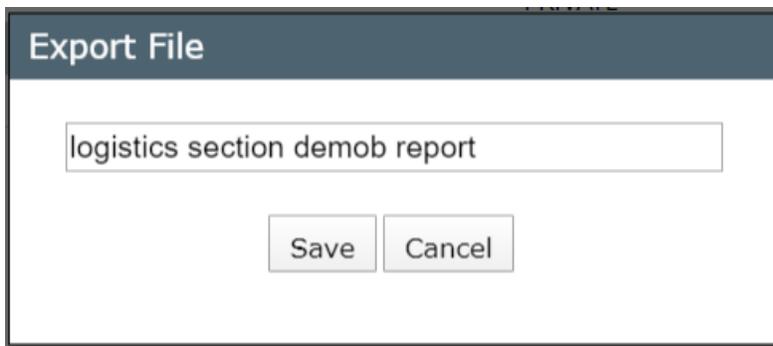
3. When the **Save Custom Report Export XML File** window displays, click the **Yes** button to save the custom report xml file.



# Custom Reports



4. When the **Export File** window displays, enter the name to assign to the export file for the Custom Report and click the **Save** button.

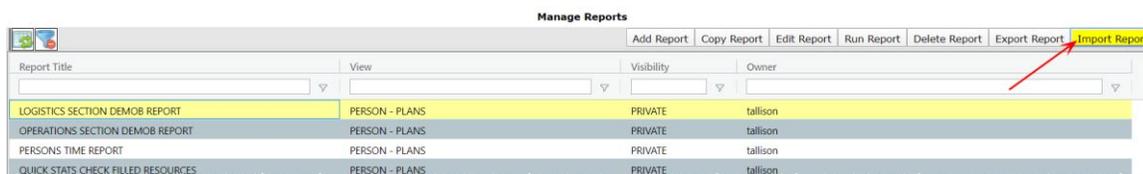


5. In the browser window that opens, navigate to the directory where the export file will be saved and click the Save button.

**NOTE:** If the browser window does not open, the system will automatically save the file to the Downloads folder on your computer's C drive.

## Import a Custom Report Template

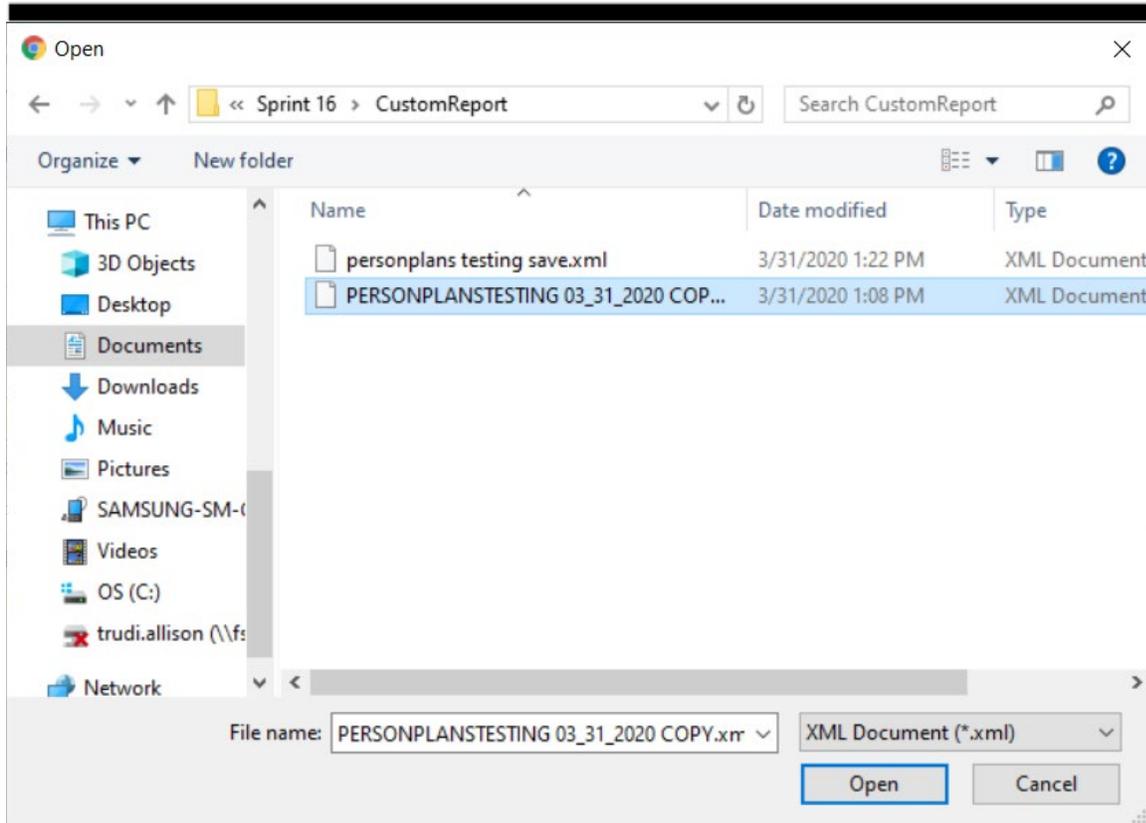
1. To import an exported custom report template, click the **Import Report** button.



2. A file browser window displays.



# Custom Reports



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.



# Custom Reports

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