

Custom Report FAQ

How do I add a pre-defined field to a report?How do I add a custom field to a report?How do I sort by a field?How do I group by a field?How do I add a total to a report?



How do I add a pre-defined field to a report?

1. Make sure there is room for the field by resizing or removing other fields.

on10_b; Condition: {UserName}		- 1		1942	19 19	s	
TagLabel ⁺ {AssetTypeNumberLabel}	{CategoryLabel}	AssetSerialNumbe	(SiteNameLabel + ": " +	[PurchaseOrderN]	{QuantityLabel}	{CostLabel}	(TotalLabel)
Category Label		I am removing the Ca	stegory field to make room for th	e Asset Model.			
Band2							
Category Data							
m8; Data Source: SpAddTransacto		and the second second					- ana - 1
dTransact ^T {SpAddTransaction_asset_type_n	SpAddTransaction cate	SpAddTransaction.a	{SiteLocation}	(SpAddTransactio A	ddTransaction as d	dTransaction a **	SpAddTransacti

a. To delete the field either right-click on the field and select delete or select the field and press the delete key. Make sure to delete/resize both the field and the label associated with it.

on10_b; Condition: {UserName}		
TagLabel [*] (AssetTypeNumberLabel)	{AssetSerialNumbe ⁺ {SiteNameLabel + ": " + 1. LabeltLocationCodeLabelt	{PurchaseOrderN (QuantityLabel) (CostLabel) {TotalLabel}
3and2		
m8; Data Source: SpAddTransaction		
dTransact [SpAddTransaction asset_type_ma]	{SpAddTransaction a {SiteLocation}	(SpAddTransactio AddTransaction as ddTransaction a "SpAddTransaction as un seret, ed no member trans committellater trans.cost) asset trans.cost)

- 2. Drag and drop the desired field on to the report
 - a. First you will need to identify the data source associated with the report data.

on10_b; Condition: {UserName}				
TagLabel *{AssetTypeNumberLabel}	{AssetSerialNumbe	{SiteNameLabel + ": " + +LocationCodeLabel}	"{PurchaseOrderN" {QuantityLabel}"	{CostLabel} { TotalLabel}
Band2				
D	ata source containing the fields.			
m8; Data Source: SpAddTransaction				
dTransact {SpAddTransaction.asset_type_ma	(SpAddTransaction a	{SiteLocation}	{SpAddTransactio AddTransaction as d	dTransaction a * SpAddTransacti

b. Find that data source in the dictionary tab under data sources.





c. Select the desired field from the data source and drag and drop onto the report. Notice when you place the field you are given two different objects. The first contains the name of the field and the second contains the actual field data.



d. Move the objects so that they are in line with the other objects and resize as necessary.

Section10 b; Condition: {UserName}			Section10_b; Condition: {UserName}		
(AssetTagLabel (AssetTypeNumberLabel)		(AssetSerialNum	{AssetTagLabel *{AssetTypeNumberLabel}	asset_model	"{AssetSeri
Move the label to be in	ine with others				
ChildBand2	asset_model	(SpAddTran	ChildBand2		
Move the data to b	e in line with the other data	/			
Section8; Data Source: SpAddTransact	ion 🥖		Section8; Data Source: SpAddTransact	lion	
(SpAddTransact (SpAddTransaction asset_type	.m]	(SpAddTransaction	[SpAddTransact [SpAddTransaction.asset_type	_mail{SpAddTransaction	in ass (SpAddTra

e. Edit the label object to show the correct label value. Double click the label object to open the text editor. In the text editor make your changes and then press OK.

Text	? ×
Mode	A Expression
	Data Column
	System



f. Once you have lined everything up and made all of the cosmetic changes like font size and style you can press the Preview button at the top of the screen to make sure everything is as expected.



Transaction Add Report@

Purchase I	Date 03/30/2016				User Name.			
Asset Tag	Asset Type	Model	Serial Number	Site: Location	Purchase Order	Quantity Par	chase Cost	Tetal
100215	22" Monitors	22" Monitors		Dallas Office 210	51061	1	169.00	169.00
100215	22* Monstors	22" Monitors		Chicago Office: 114	21506	1	199.00	199.00
100215	22* Monitors	22" Monitors		Chicago Office: 122	1605016	1	179.00	179.00
98760002	Desk Chair	Black Desk Chair		Dallas Office 210	10560165	24	179.00	4,296.00
98760002	Desk Chair	Black Desk Chair		Chicago Office: 203	11501	32	99.00	3,168.00
98760002	Deik Chair	Black Desk Chair		Chicago Office: 202	11501	15	99.00	1,485.00
98763057	Jive Highback Office Chair	Jive Highback		Dallas Office Conference Room 1	56016501	10	159.00	1,590.00
98765057	Ave Highback Office Chair	Jive Highback		Chicago Office: 101	56016501	6	159.00	954.00
					Tetal	90		12,848.89
Purchase I	Date 03/31/2016				User Name.			
Asset Tag	Asset Type	Model	Serial Number	Site: Location	Purchase Order	Quantity Pur	chase Cost	Tetal
10025	Dell Optiplex 3010	Optiplex 3010	#sd6431200795	Chicago Office: 202		1	889.00	\$\$9.00
10026	Dell Optiplex 3010	Optiplex 3010	bsd4041200775	Chicago Office: 203		1	889.00	\$89.00
10040	Dell Outplex 3010	Optiplex 3010	md4431200795	Datias Office: 217		1	\$49.00	849.00



How do I add a custom field to a report?

Many of the steps for adding a custom field to a report are the same as above so I will just cover the differences here.

1. First you will need to jot down the schema for later user. The schema info is found under the Variable -> Do Not Touch section. My schema value is dbo.

Dictionary	
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🗉 🔲 Data Sources	
Business Objects	
E BHS Variables	
🖃 🛅 Do Not Touch	
INH ATNOP	
ME ATOp	
IHI AssetSerialNumberLabel	
We AssetTag	
IRE AssetTagLabel	
IME AssetTypeNumber	
IBI AssetTypeNumberLabel	
IHE COp	
WE Category	
IHE Category Label	
Mil CompanyName	
IIII CostLabel	
HHE DateAcquired	
38 DateAddedLabel	
IHI EndTransDate	
385 FileNameLabel	
IIII FormatMoneyDecimal	
IMH SiteLocation	
Mill SiteNameLabel	
IMH StartTransDate	
(Mill Tenant	
IMI TotalLabel	
IMI TransactionQuantity	
IN UNOp	
IMBI UserID	
MHI UserName	deathly all all and an an
IMII UserName1	to see the
Mil UserNameLabel	information
C bAny Content	
Milschema	
E IN System Variables	

Edit Variable			? ×
Name:	schema		
Alias:	schema		
Description:			
Type:	588 string +	Value	
Init by:	Value +]	
Value:	dbo		-
/	Read Only Request from User		
write this value day		OK	Cancel



2. Now find the data source associated with your custom field. If you created a Site custom field then you will look under the SpSiteViewsWithCustomFields data source. In this example I created an Asset custom field so I will be working with the SpAssetViewsWithCustomFields

Dictionary	ę.
a - ⊠ ×	
E Data Sources	
🖃 🧧 WaspDB2012 [MS SQL]	
SpAddTransaction	
SpLabels4CR	
Business Objects	
transition transition	
fx Functions	

- 3. Next you will need to execute the data source to make it retrieve the custom fields.
 - a. To do this start by right-clicking on the data source you identified in the previous step and selecting edit
 - In the Query Text field you will see something like this: {schema}.SpAssetViewsWithCustomFields
 If you don't see the {schema} that's alright just make sure the end result is: valueFromAbove.SpAssetViewsWith
 CustomFields

In this example my query text would be: dbo.SpAssetViewsWithCustomFields

Edit Data So	urce					
Name in Sour	ce: WaspD	082012				
Name:	SpAss	etMewsWithC	CustomFields			
Alias:	SpAss	SpAssetMewsWithCustomFields				
1 SQL 100						
Query Text						
R	move (schema	a) and				
Re re yo	move (scheme place it with th u wrote down	a) and e value earlier.				
Type: Str	emove (schem: place it with th u wrote down ored Procedure	a) and e value earlier. -]			
Type: Sta	emove (scheme place it with th u wrote down ored Procedure	a) and e value earlier. Columns]			
Type: Str Type: Str Type: Str Heli columns	emove (scheme place it with th u wrote down ored Procedure	a) and e value earlier. - Columns	- Name in Source:	Id		
Type: Sta Type: Sta Type: Sta State columns	emove (scheme place it with th u wrote down ored Procedure	a) and e value earlier. Columns	- Name in Source:	ld Id		
Type: Str Type: Str Type: Str Stressed B HHE columns DBI asset_kt	emove (schema place it with th u wrote down o wred Procedure	a) and e value earlier. • Columns	Name in Source: Name: Aline:	ld Id		



c. Now we are ready to execute the data source. First click the drop down on the right of Retrieve Columns, then check the "Allow Run StoredProc" check box and lastly click "Retrieve Columns."

		×
Name in Source:	aspD82012	
Name:	AssetMewsWithCustomFields	
Alias:	AssetMewsWithCustomFields	
1 sq. 🔜		
Query Text		
and a state of the second s		
Type: Stored F	sure • 1. eve Columns 💷 •	
Type: Stored F	Sure	
Type: Stored F	sure	
Type: Stored F	Sure • 1. eve Columns II. Retrieve Columns and Parameters Retrieve Parameters V Allow Run StoredProc	
Type: Stored F Stored F	Sure • 1. eve Columns E • Retrieve Columns and Parameters Retrieve Parameters Allow Run StoredProc Allas: 1d	

d. You should now see a list of columns that includes your custom fields. Press OK.

🔄 🕷 🐜 🗙 🗟 Retrieve Columns 🗒	*)			
1881 columns	Name in Source:	ld		
THE Id	Name:	ld		
	Alas:	ld		
MR asset_id	Type:	int	-	
Dipperameters My custom field				

e. Now you can drag and drop the field from the data source onto the report



How do I sort by a field?

1. Find the Data Source band and double click on it or press Design on the Properties tab

Design Page and Columns Break Columns Position Appearance Becton7 (FileNameLabel) Behavior Design CoupHeaderBandt: Conotion: (DateAcquired)	Properties 0	
	Design	
Columns Position Position Appearance Entavior Design OroupHeaterBandt; Condition (DateAcquired)	+ Page and Column Break	
Position Appearance Selector? (FileNameLabel) Design OroupHeaderBanil1; Condition; (DateAcquired)	+ Columns	
Appearance (FileNameLabel) Behavior Design OroupHeaderBand1; Condition; (DateAcquared)	+ Position	Becton7
Dehavior Design Design	+ Appearance	{FileNameLabel}
Design OnopHeaderBand1: Condition: (DateAcquired)	Dehavior	
	+ Design	OroupHeaderBand1; Condition (DateAcquired)
Sector2, Condition. (UserName)		Sector2, Condition, (UserName)
[DateAddedLabel] (DateAcquired)		(DamAddedLabel) (DateAcquired)
ChildBand3		ChidBand3
Section10_b: Condition (UserName)		Section10_b: Condition: (UserName)
[AnnerTingLahed] [AnnerTippeNumberLahed] [ContegoryLahed] [AnnerTimetaDumber [N]		[AmerTagLabel"[AmerTypeNumberLabel] [CutegoryLabel] [AmerTaris/Sumber[Dise]
ChieBand2		ChidBan62
Section8, Data Source: SpAddTransaction (1pAddTransaction.com/(1pAddTransaction.com/(1pAddTransaction.com/(1pAddTransaction.com/(1pAddTransaction.com/)) distribution of the section of		Section 8, Data Source: SpAddTransaction "[bp.kidTrassaction] [bp.kidTrassaction] [
Select the Data Source band and these either double click is or click on (SpAddTravarters.arts_tert) Design above.	Select the Data Source band and then either double click it or click on Design above.	ChidBand1 (lpAddTraverties.arts_tert)

2. Next click on the sort tab to view the sort menu

Cons		
M Add Sort 🔀 Remove Sort		
Sort by asset_tag	Ascending •	Data Source
		-
		Data Relatio
		Component
	Click to view the sort menu.	Filters



3. If you want to add an additional sort criteria click the "Add Sort" button. To change the existing sort criteria click on the "..." button and select a new field. Then choose Ascending or Descending. Lastly press OK. Use Preview to see your changes.

y Add Sort 🗙 Remove Sort		
Bort by asset_trans_quartity		Cuta Soute
	Data Column	×
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	Will asset_checkout_duration	
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	III asset_prested_date	2
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	Cill asset_depreciated_volum	
	ISI asset_depreciation_begin_date	
	IDI assist_depreciation_end_date	
	IIII assist_description	
	Winnet_it	
	III asset_last_depreciation_date	
	Wilasort_last_updated_by	
	III asset_last_updated_tale	
	SHI most_lead_time	
	i#E asset_model	
	Cillasset_pd_cost	
	Cill assist_pd_order_pty	
	Masset_pd_po_number	-
Inpediate	III asset_pd_purchase_date	
Concer Day of the	Cilliasse(_salvage_value	-
CroupFoolersect	OK	Carvel



How do I group by a field?

1. First you will need to identify what the report is currently grouping the data The easiest way to identify the bands that are grouping data is to look for the Orange colored bands that are before the blue data band. In the example below you will see a Date Acquired group and User Name Group. The Date Acquired group is grouping all of the assets that were acquired on the same day together. The User Name group is grouping the add transaction by who performed them.

	Section7
	{FileNameLabel}
Date Acquired Group	GroupHeaderBand1; Condition: (DateAcquired)
User Name Group	Sector2: Condition: (UserName)
	(DateAddedLabel) (DateAcquired)
	ChildBand3
User Name Group	Section 10_b; Condition: (UserName)
	[(AmerTagLabel' [AmerTypeNumberLabel] [(CategoryLabel] [AmerSeri
	ChildBand2
	Section8: Data Source: SpAddTransaction {bpAddTransact(bpAddTransaction and by [bpAddTransaction cal [bpAddTra
	ChildBand1 (SpAddTressection acts_text)
	GroupFooterSection 1
	Section4

2. Select the group band you wish to change and double-click it or select Design from the properties tab.



3. To group by a field of data click on the Data Column tab and select the field from the list and sort direction.

Group	×
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All asset_lead_time	Are
Wisset_rodel	Excession
CHasset_pt_cost	Contents
Chemost_pd_order_sty	-
Winnet pt_po_number	(<u>A</u>)
Calanati pic purchase_date	Data Colum
Cill assort_sale age_value	
Wienset_serial_number	Am
Conset_should_depreciate	
per_incom limit	Surreaky
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Cill assist_trans_quarity	
GE most type_mits_R_data	
Illiannet hope checkour duration	-



- 4. Changing the grouping might affect the totals and other data on the report. Make sure you use preview to make sure the data appears as you expect it to.
- 5. If you want to add an additional group band to the report click on the INSERT tab and then drag and drop from the Group Header button. This will open the design window for the new band which will allow you to select the data column. Once you press OK you may need to adjust the location of the band by clicking and dragging.

FILE HOME INSET	LAYOUT	PREVIEW						
Bands Cross Components	Page Page Header Footer	Group Header Footer	Header Footer	Data Text	image	Chart		
Groups			Main					
Properties		This band is the basic b	and for rendering					
Des	ign	reports with grouping. T showing information by	the components for this group are					
Page and Column Break		placed on the group he group name, date, cond etc. This band is output	ader. It can be lition of grouping once in the					
+ Position		beginning of each grout	p.					
Appearance		Tell me more		-				
Behavior			{FileNa	meLabel}				(CompanyName)
> Design			_	1.5			-	1
			GroupHeader	(Band1, Condition	: (SpAddTh	ansaction.	istet_tag}	



How do I add a total to a report?

1. Insert a text object onto the report

[] (#XEW-128-95001) Water 🗙 ([]) (#C-5464) Sprint 17 - Ter 🗙 ([- 1	sepTrack API X (Reports@ X) Transaction Add Report: X
← → C 🗋 localhost 28302/Report/DesignIndex	
🔢 Apps 🔺 Bookmarks 🛐 Stimulsoft Help Desk 🍖 Fogbugs 🚼 Supp	art 🐵 FootPhints - Wasp Su: 🤶 System Dashboard - 🦉 bit bucket 🗋 BaseCamp 🥥 Informatics WebEx E: 🗋 KeyPro Web Utility 🗋 Home - Product Dess 🗋 Spa
FILE HOME INSERT LAYOUT PREVIEW	
Bards Cross Components Plage Plage Copy Header Pro	up Headar Foter Data Net Image Chart
Properties 0	
+ Page	
+ Page Additional	
+ Columns	
+ Appearance	
+ Behavior	[fileName] abel)
+ Design	(included)
	OroupHeaderBand1, Constion: (DateAcquired)
	(DateAddedLabel) (DateAcquard) (UserNameLabel) (UserName)
	ChildBand3
	Restant & Constant Alignment
	[AnorTegLabel (AnorTypeNumberLabel) [KorganyLabel] [AnorTerialNambe]SimNameLabel - " ParabaseNederSQuantityLabel] (SociLabel] (SociLabel] (SociLabel]
	ChildBand2
	Section®, Data Source: SpAdoTransaction
	(IpAddTenser) (IpAddTensecton not, type, (IpAddTensecton of (IpAddTensecton / (IpAdd
	ChildBand
	[SpAldTowards.art_bot]
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	Sector4
	[GradDenLabd]Tenuction.over Transition.over Transition.over

2. The Design window will open automatically. If it does not double click the text object

Text		7 ×
	3	Expression Data Column System Variable Summary
	ОК	Cancel



- 3. In the Design window click on the Summary tab
 - a. First select the Summary Function (count, sum, average)
 - b. Select the Data Band to sum for. If you want a grand total of the entire report then leave it as Not Assigned. If you want a total based on the UserName group then select that data band from the drop down. If you do not see the band in the drop down then you may have to manually type it at the top.
 - c. Select the Column to sum
 In the example below I have selected to Sum the asset_trans_cost column for the GroupHeaderBand1. What this does in my report is sum the cost of the asset at transaction for the user group.

Text			? ×
Sum(GroupHeaderB	and1 SpAddTransaction.asset_trans_cost)		Expression
Summary Function:	Sum	•	A
Data Band:	Section8	*	Data Column
Data Column:	SpAddTransaction.asset_trans_cost	111	
Summary Running			System
Report			Variable
Column			Δ <u></u>
Page			Summary
Running Total			
Condition			