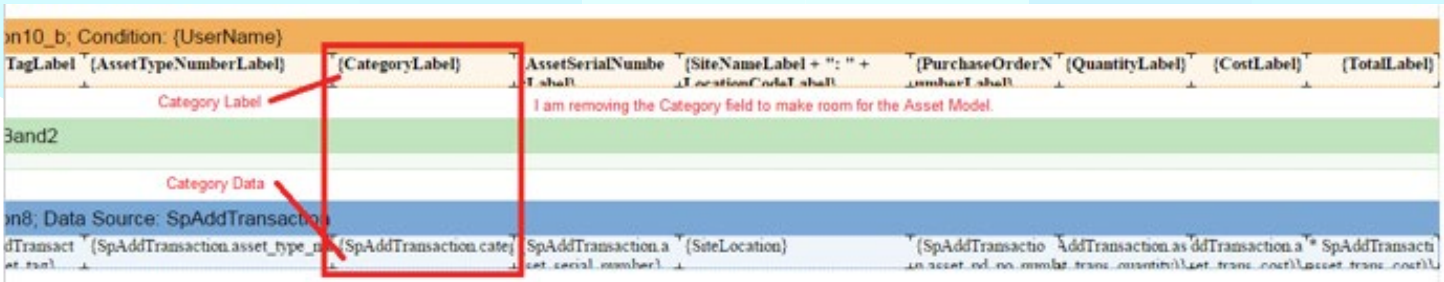
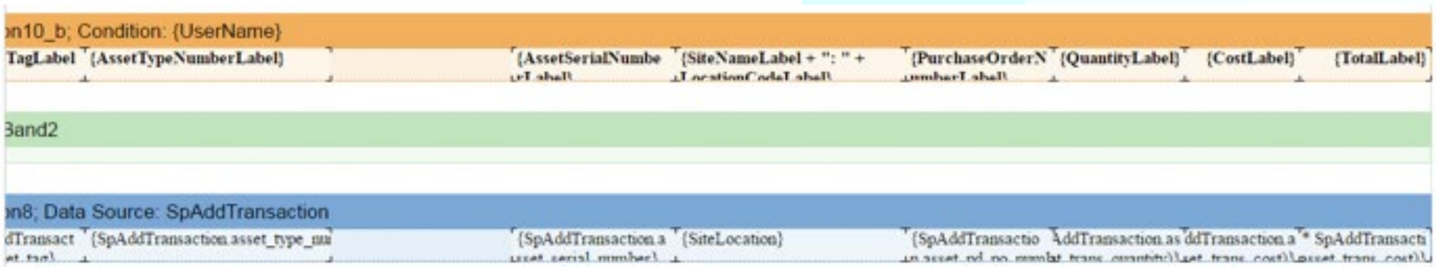
Custom Report FAQ

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.

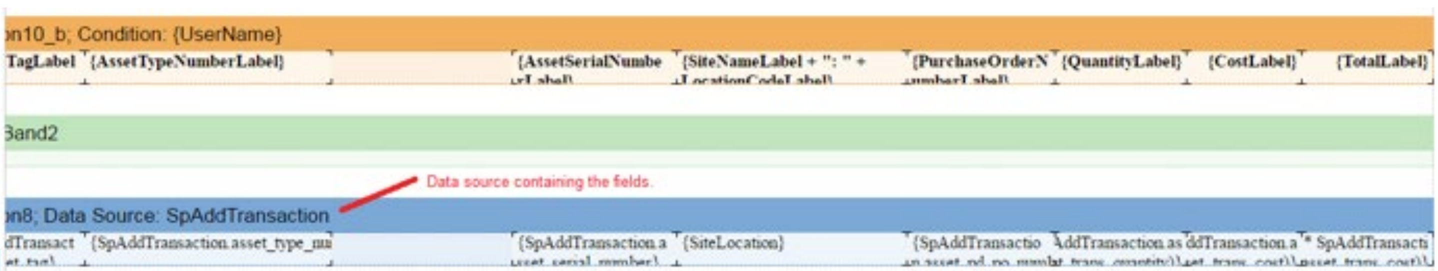


   a. To delete the field either right-click on the field and select delete or select the field and press the delete key. Make sure to delete/resize both the field and the label associated with it.

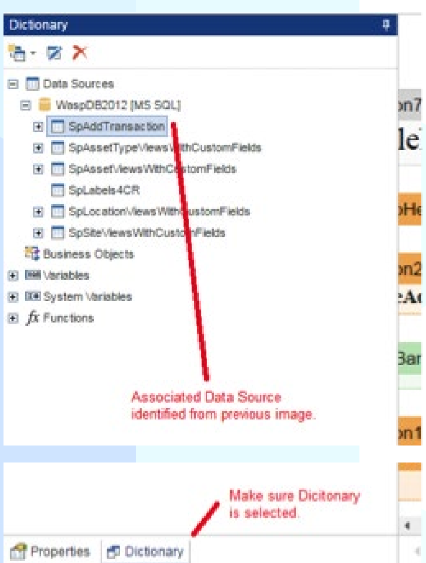


2. Drag and drop the desired field on to the report

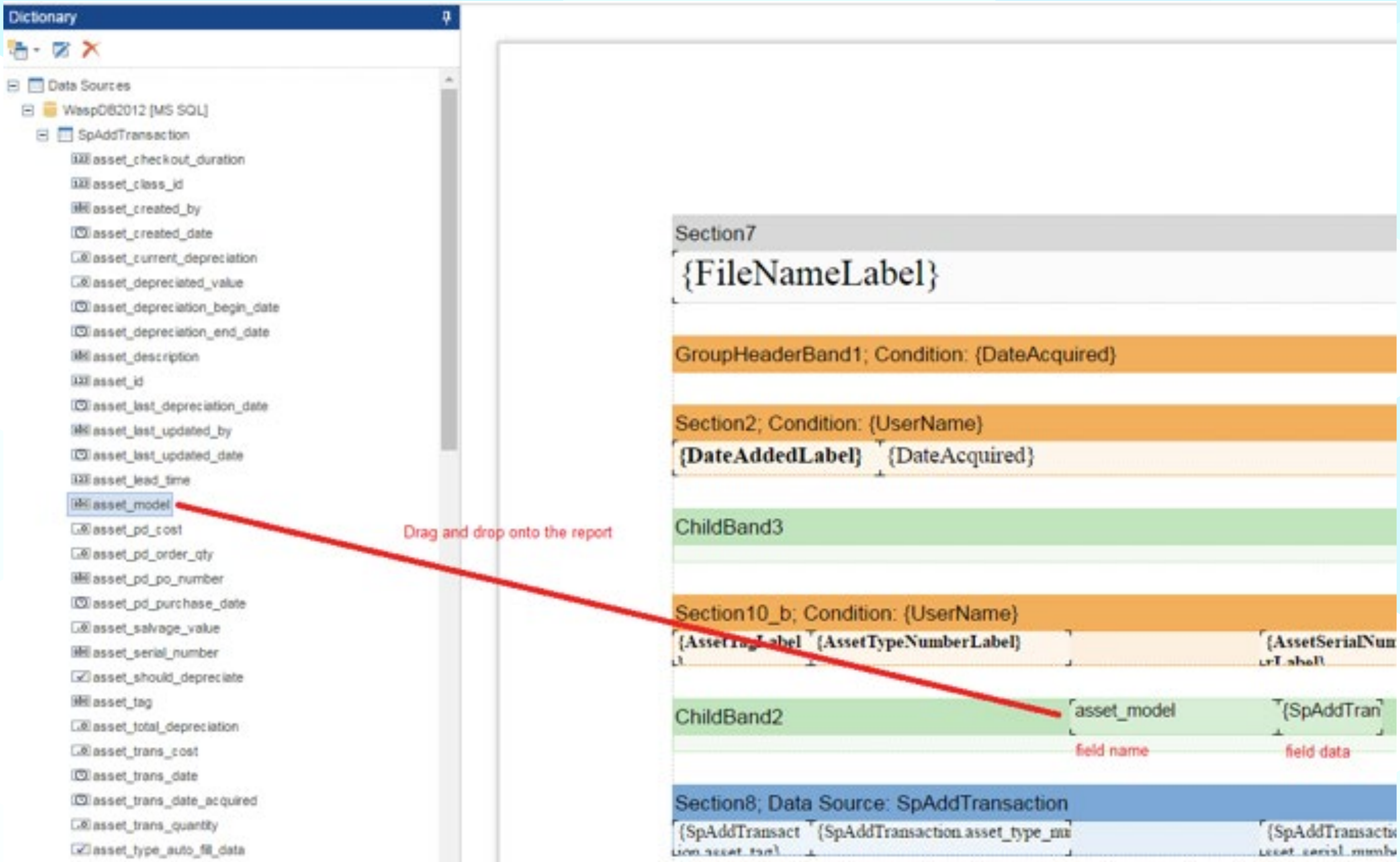
   a. First you will need to identify the data source associated with the report data.



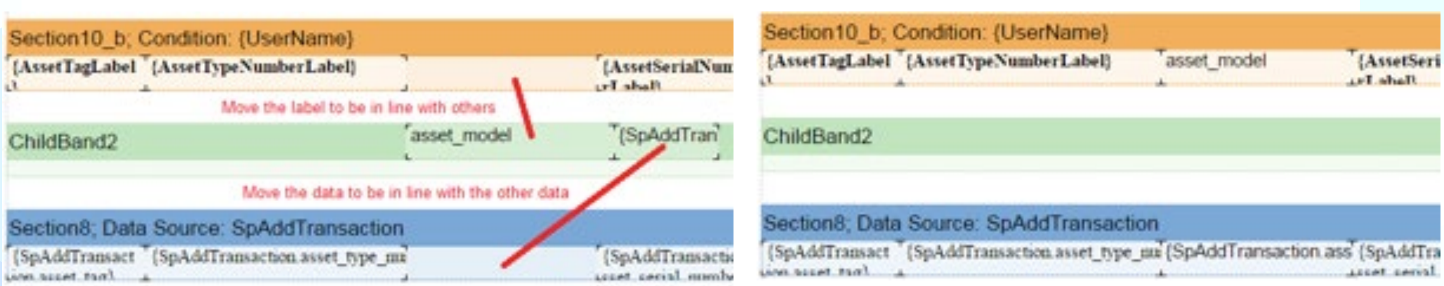
   b. Find that data source in the dictionary tab under data sources.



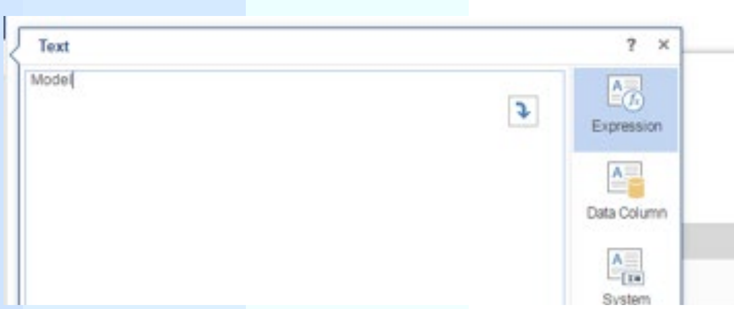
c. Select the desired field from the data source and drag and drop onto the report. Notice when you place the field you are given two different objects. The first contains the name of the field and the second contains the actual field data.



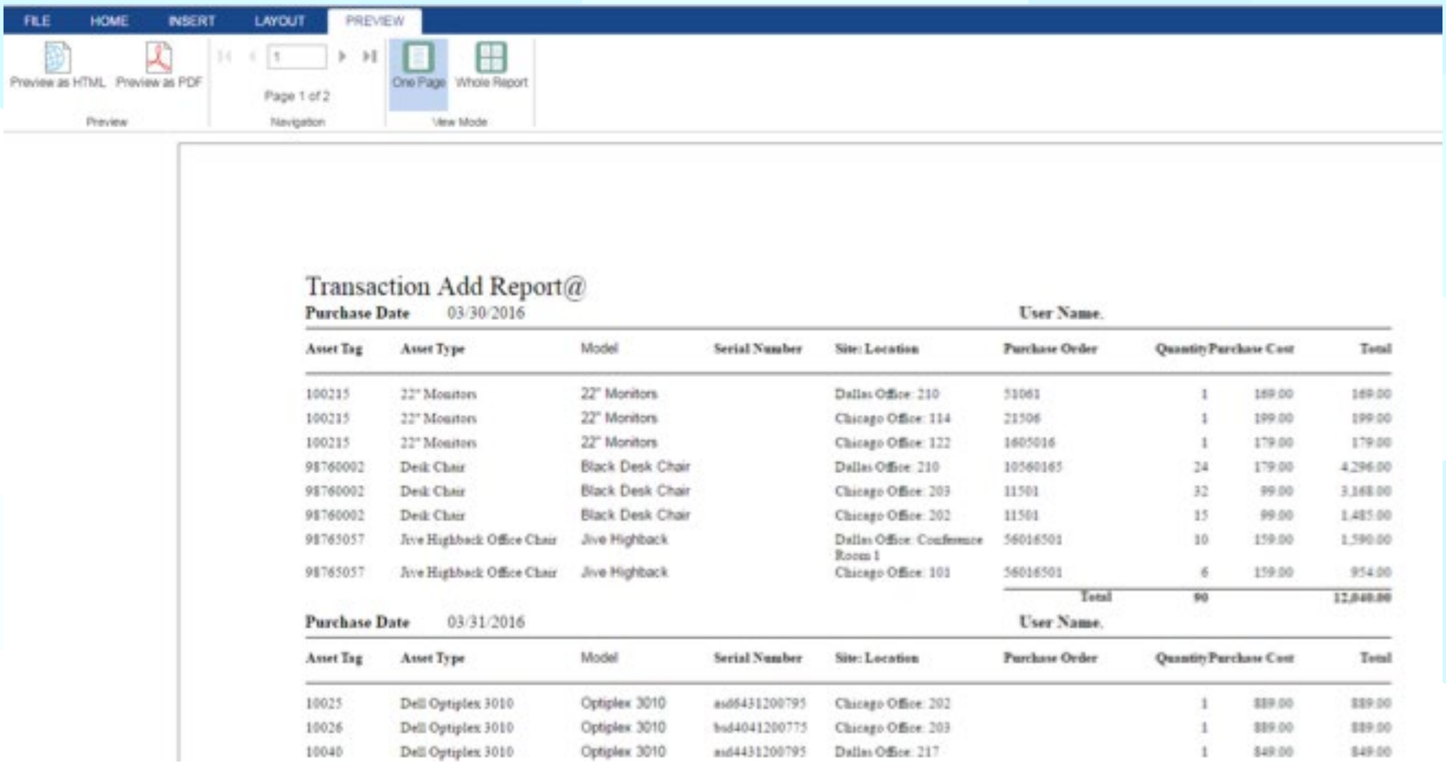
d. Move the objects so that they are in line with the other objects and resize as necessary.



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.



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 Date 03/30/2016 **User Name.**

Asset Tag	Asset Type	Model	Serial Number	Site: Location	Purchase Order	Quantity	Purchase Cost	Total
100215	22" Monitors	22" Monitors		Dallas Office: 210	51061	1	169.00	169.00
100215	22" Monitors	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	Desk Chair	Black Desk Chair		Chicago Office: 202	11501	15	99.00	1,485.00
98765057	Jive Highback Office Chair	Jive Highback		Dallas Office: Conference Room 1	56016501	10	159.00	1,590.00
98765057	Jive Highback Office Chair	Jive Highback		Chicago Office: 101	56016501	6	159.00	954.00
					Total	90		12,040.00

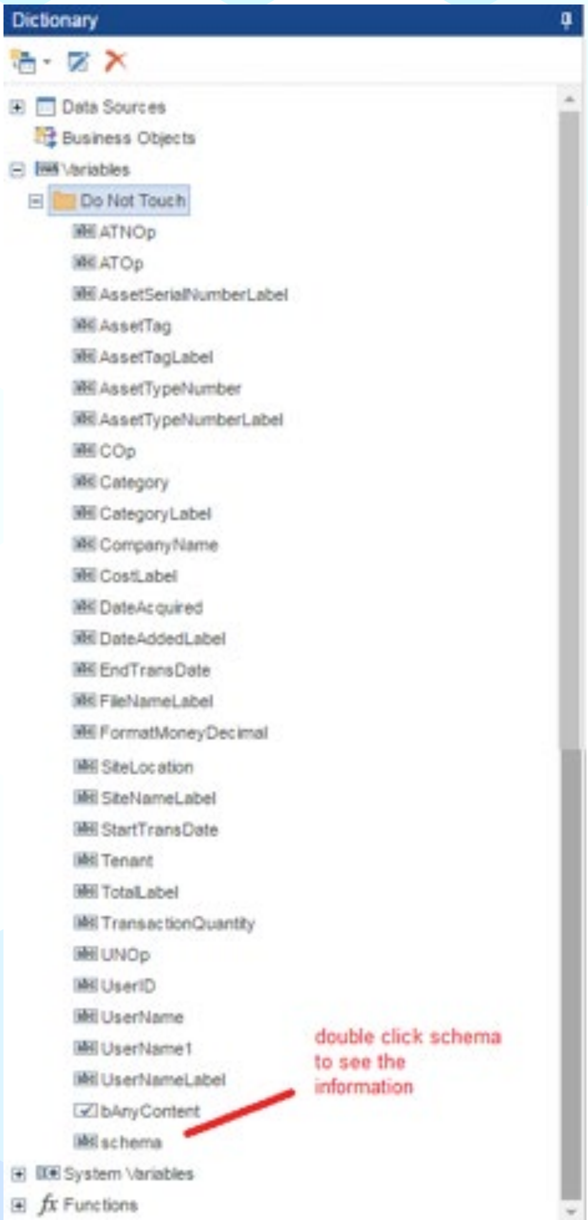
Purchase Date 03/31/2016 **User Name.**

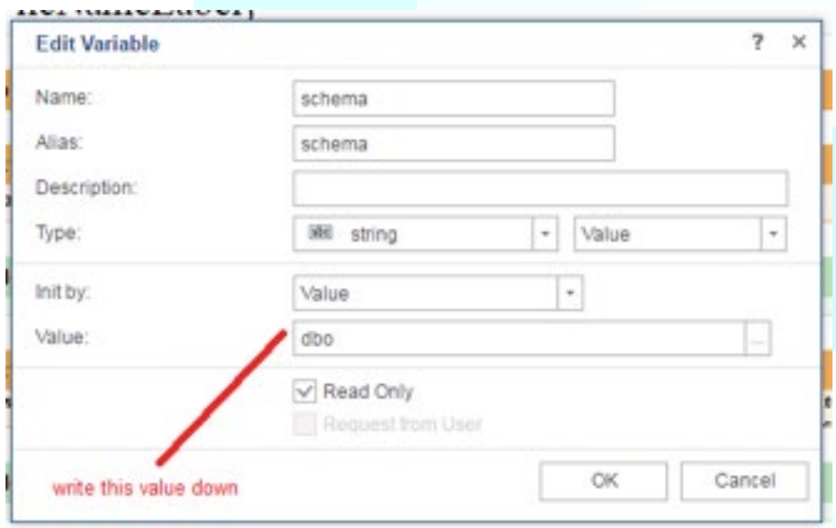
Asset Tag	Asset Type	Model	Serial Number	Site: Location	Purchase Order	Quantity	Purchase Cost	Total
10025	Dell Optiplex 3010	Optiplex 3010	asd6431200795	Chicago Office: 202		1	889.00	889.00
10026	Dell Optiplex 3010	Optiplex 3010	bsd4041200775	Chicago Office: 203		1	889.00	889.00
10040	Dell Optiplex 3010	Optiplex 3010	asd4431200795	Dallas Office: 217		1	849.00	849.00

How do I add a custom field to a report?

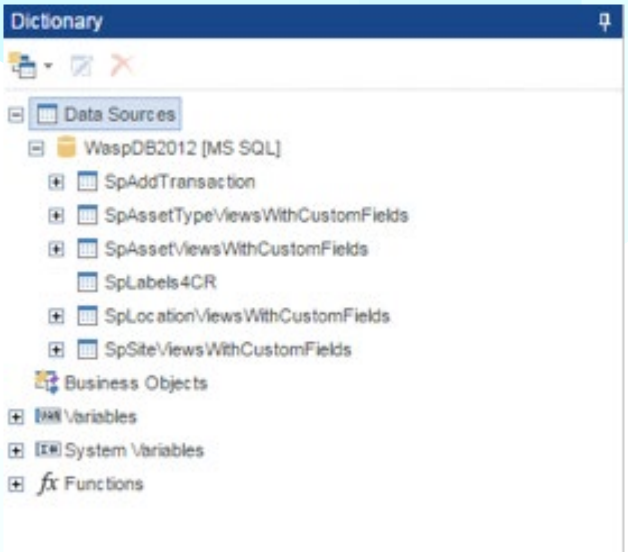
Many of the steps for adding a custom field to a report are the same as above so I will just cover the differences here.

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.





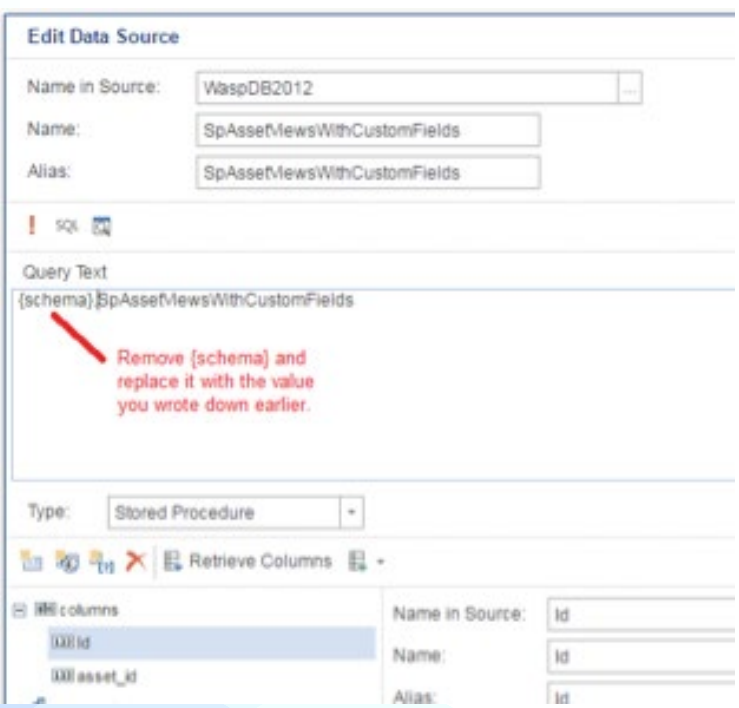
2. Now find the data source associated with your custom field. If you created a Site custom field then you will look under the SpSiteViewsWithCustomFields data source. In this example I created an Asset custom field so I will be working with the SpAssetViewsWithCustomFields



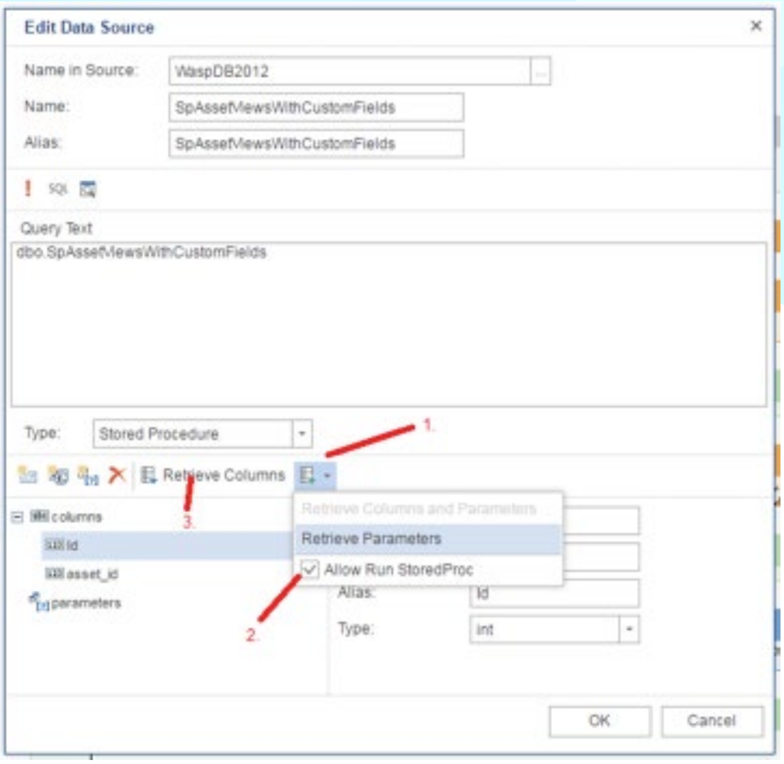
3. Next you will need to execute the data source to make it retrieve the custom fields.

   a. To do this start by right-clicking on the data source you identified in the previous step and selecting edit

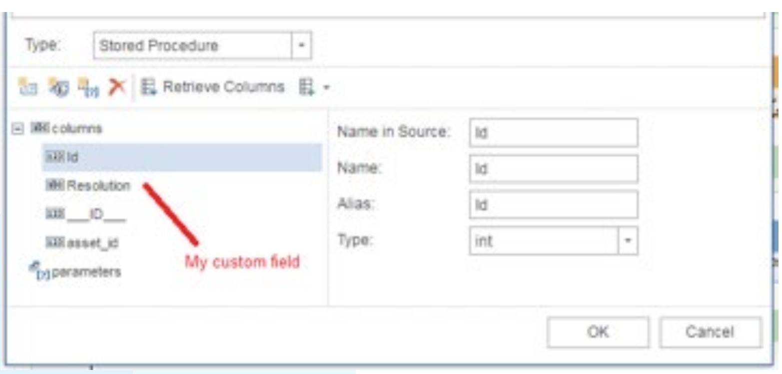
   b. In the Query Text field you will see something like this: {schema}.SpAssetViewsWithCustomFields
   If you don't see the {schema} that's alright just make sure the end result is: valueFromAbove.SpAssetViewsWith CustomFields
   In this example my query text would be: dbo.SpAssetViewsWithCustomFields



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.”



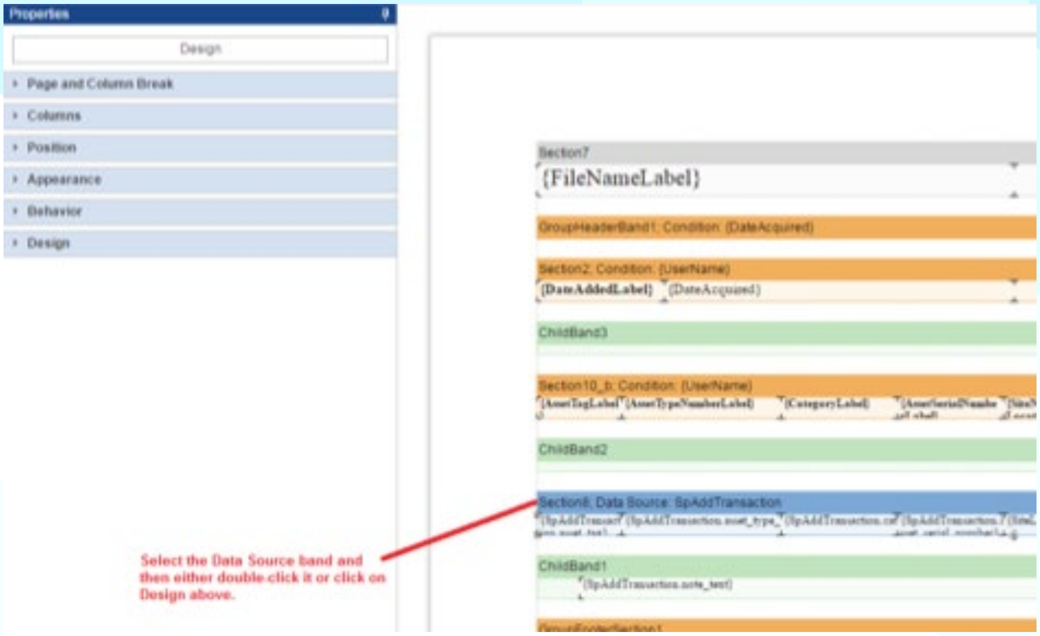
d. You should now see a list of columns that includes your custom fields. Press OK.



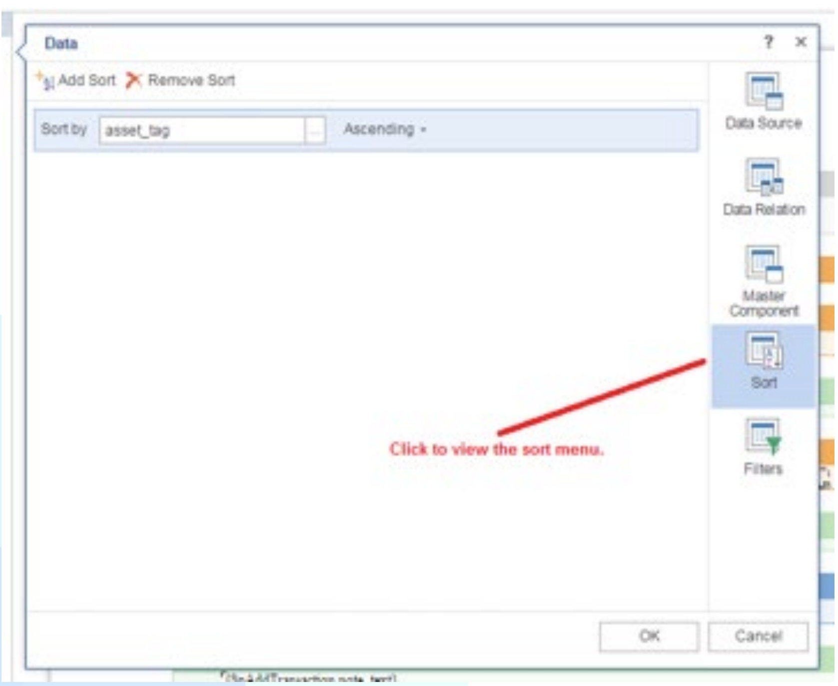
e. Now you can drag and drop the field from the data source onto the report

How do I sort by a field?

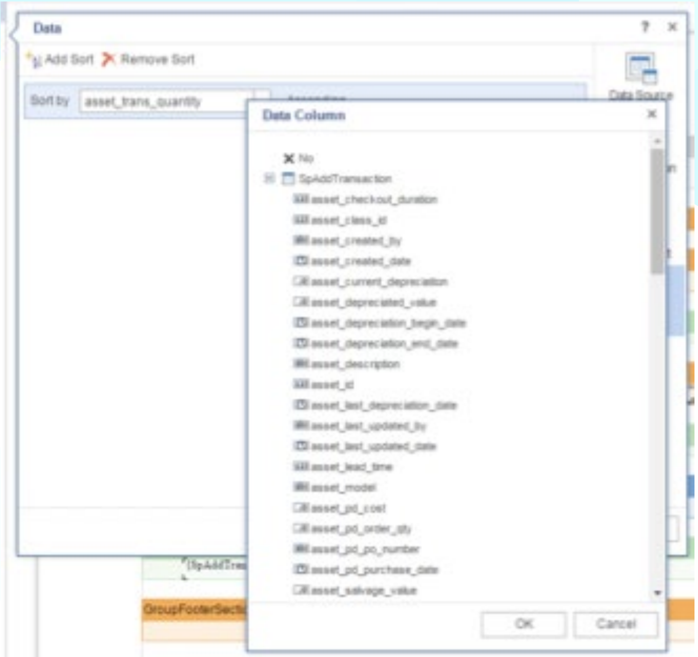
1. Find the Data Source band and double click on it or press Design on the Properties tab



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



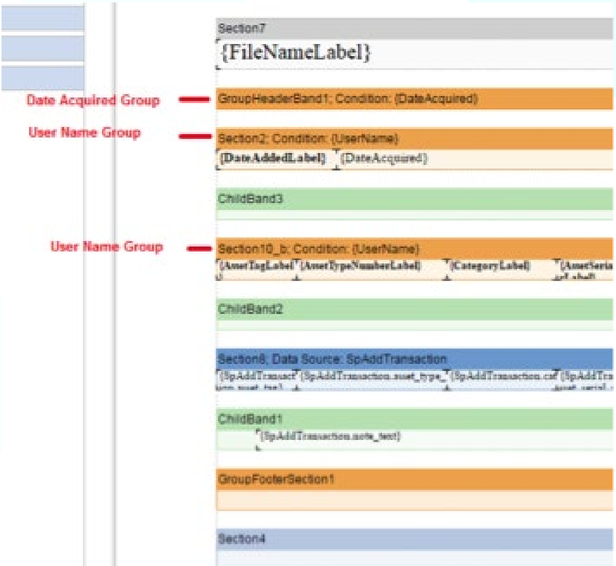
3. If you want to add an additional sort criteria click the “Add Sort” button. To change the existing sort criteria click on the “…” button and select a new field. Then choose Ascending or Descending. Lastly press OK. Use Preview to see your changes.



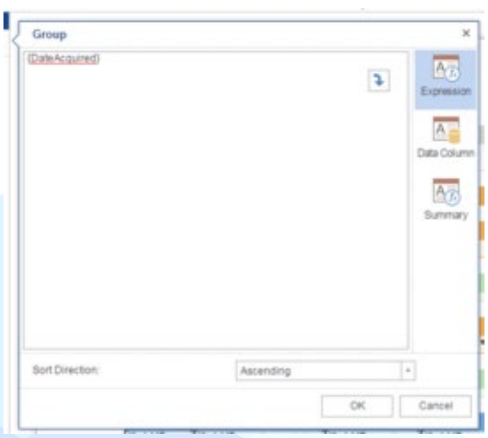
How do I group by a field?

1. First you will need to identify what the report is currently grouping the data

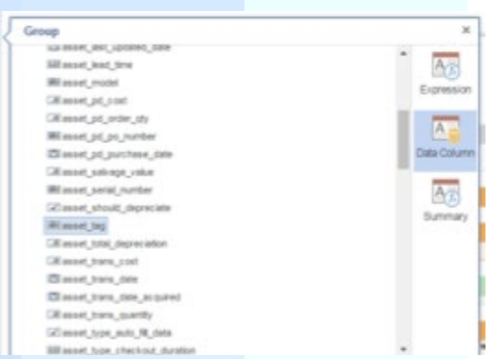
   The easiest way to identify the bands that are grouping data is to look for the Orange colored bands that are before the blue data band. In the example below you will see a Date Acquired group and User Name Group. The Date Acquired group is grouping all of the assets that were acquired on the same day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



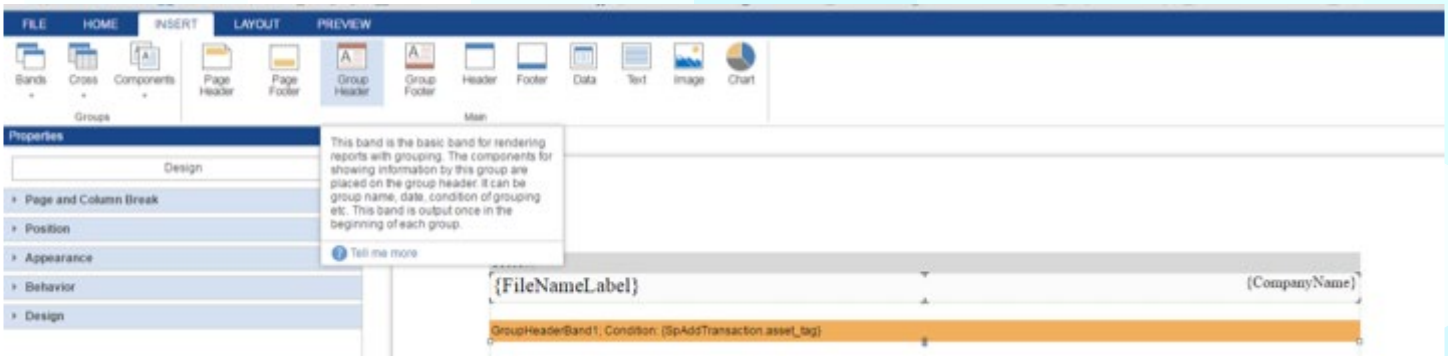
2. Select the group band you wish to change and double-click it or select Design from the properties tab.



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

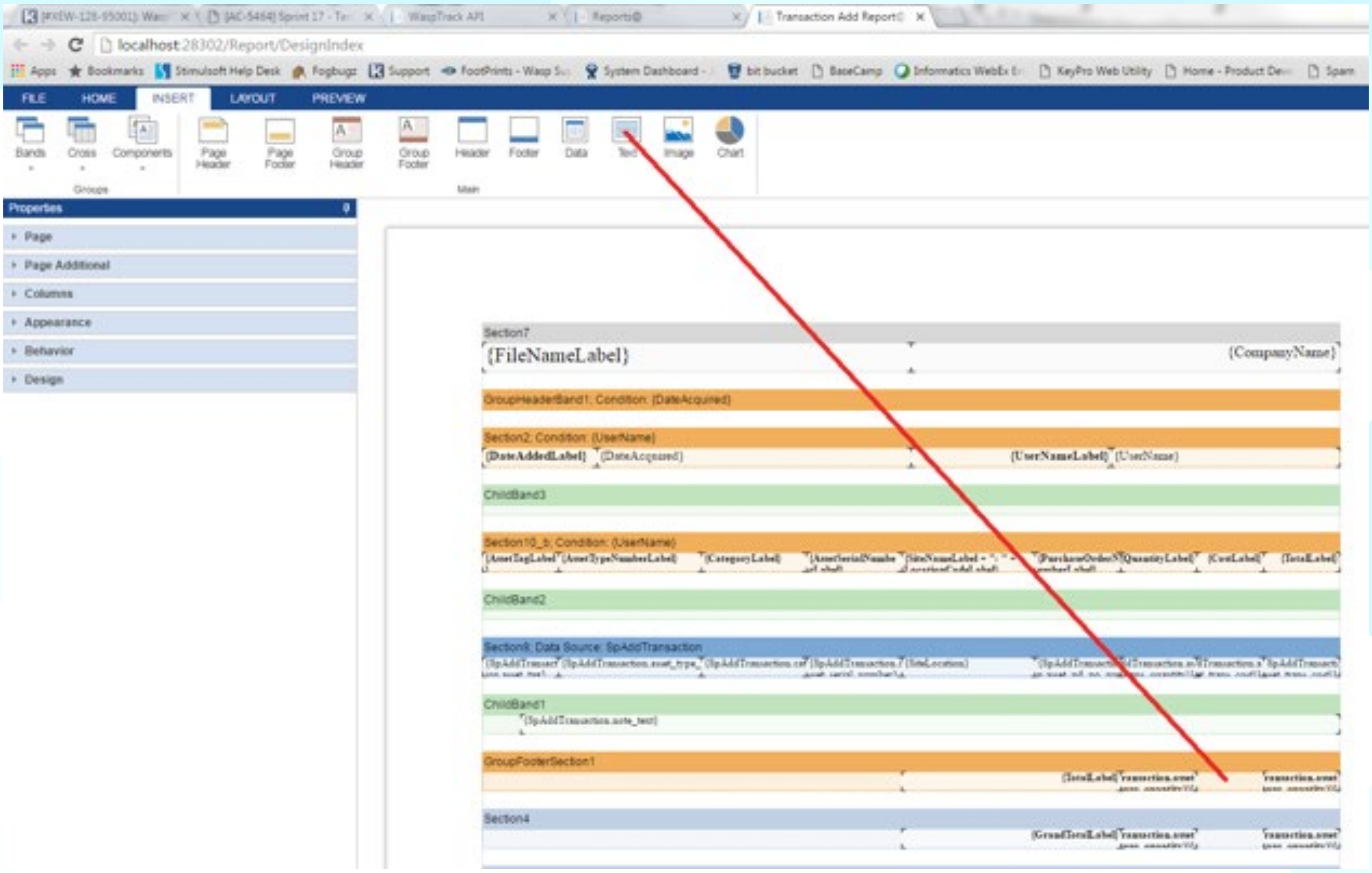


4. Changing the grouping might affect the totals and other data on the report. Make sure you use preview to make sure the data appears as you expect it to.
5. If you want to add an additional group band to the report click on the INSERT tab and then drag and drop from the Group Header button. This will 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.

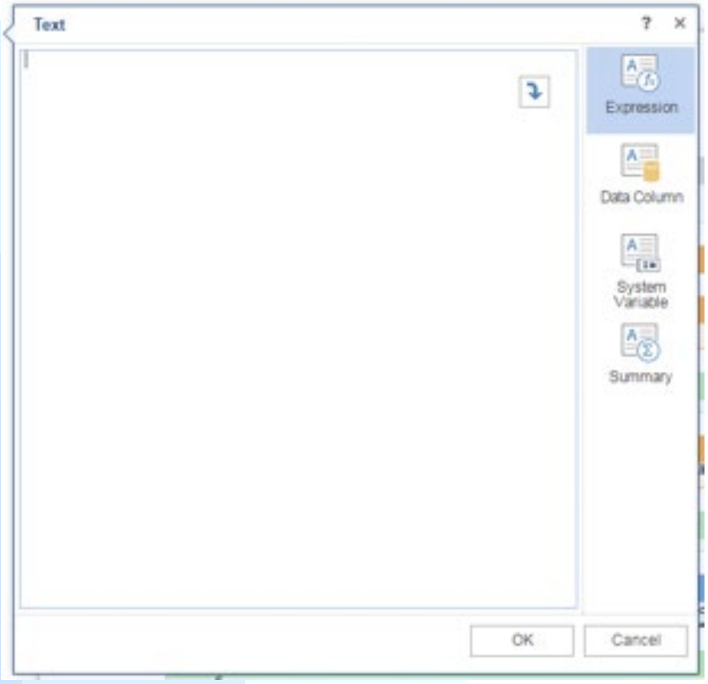


How do I add a total to a report?

1. Insert a text object onto the report



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



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.