

## Custom Reports (CR)

Custom Reports (CR) is a collection of features that allow you to define data selection methods associated with specific reports and save them for future recall. This allows sophisticated reports to be created by inexperienced users. A report and its selection criteria is selected once and save for easy future access.

**ContainerTRACKER<sup>®</sup>** provides 62 styles of reports for transactions, inventory, Inventory Alarms and utility functions. The data of many of these reports is determined by user selections. Because of the many user-selected criteria, the selection process can define hundreds of millions of individual reports. Custom Reports allow users with appropriate permissions to save report selection criteria for any reports within the system. This allows quick, consistent reporting for experienced or inexperienced users. Custom Reports also standardize system reporting within the organization. Custom Reports are required to automate report presentation or emailing through Triggers.

### Overview

**ContainerTRACKER<sup>®</sup>** supports 27 'Button' Custom Reports, nine (9) in each of three (3) categories and 31,900 numbered 'Custom Reports'. Users, with appropriate permissions, define Custom Reports. Report creation requires the user to select report criteria from the 'Transaction' screen, the 'Inventory' screen or the 'Reports Menu' screen.

Most of the communications in a cyclic asset system are between specific partners. This 'conversation' rarely includes all transactions or inventories or occurrences within the system. More often it is partner exchange and system exceptions that are communicated. Most tracking information is not particularly useful because it identifies appropriate, normal performance. Custom Reports, combined with other features, allow you to automatically communicate poor performance, inventory failures and appropriate summaries instead of raw data. This is the specific information required to manage your system.

### Features

*Button Assignment* – 27 defined Custom Reports can be assigned to buttons on the 'Reports Menu' screen. These reports are identical to a numbered Custom Reports but also have a screen button assigned to them. You have three (3) sets of nine (9) buttons each. One set is for 'Transaction Reports', the second is for Inventory Reports, and the third is for all other reports. When you save a Custom Report you are presented with a screen that allows you to select whether the custom report will be a button report or a numbered report.

*Dynamic Dates* – When a transaction report is saved as a Custom Report the date range of the report is assigned dynamically. If you select 'last month' as the date range, **ContainerTRACKER<sup>®</sup>** calculates what the starting and ending date are from the definition 'last month'. When you view a Custom Report the dates are recalculated using the computer date. A 'last month' report will always show the last month relative to the date the report is run. When you select the viewing criteria of a report, you can enter a specific 'start date' and 'end date'. If the report is specified in this manner, it is not dynamic; the entered dates are retained.

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*Easy Report Creation* – When the selected report is viewed a user can save the definition of the viewed report as a ‘Custom Report’. You then select whether to save the report as a ‘button’ or numbered report. You assign a ‘button title’ (for example, Acme Tanks Last Week) for button reports and a description for numbered reports. The Custom Reports (CR) feature saves a definition of the report that includes the user assigned name, the button assignment, the report file name, user selection criteria and a date offset.

*Report Automation* – Reports can be automated to be displayed or emailed based on system criteria. This is done through the ‘Triggers’ feature. The ‘Triggers’ feature can only access reports that are saved as Custom Reports. Only defined Custom Reports have the selection criteria defined.

*Viewing Reports* – Custom Reports are viewed in the report viewer like standard reports. From the viewer they can be exported as .PDF files or Emailed. Custom Reports are selected for the viewer by clicking on the screen button (when assigned to a button) or selected from a list. Button or numbered Custom Reports can be selected from a list. List display has the following options.

- List Button Reports
- List Numbered Reports
- Order List by Report Name
- Order List by Report Number
- List All Reports
- List Transaction Reports
- List Inventory Reports
- List Other Reports

*Utilities* – the Custom Reports ‘Make Custom Reports’ and ‘Edit Custom Reports’ screens provide the following utility functions.

- Define Button Report
- Define Numbered Report
- Change Button Report Name
- Change Numbered Report List Name
- Clear Button Report Definition
- Clear Numbered Report Definition
- Redefine Existing Numbered Report
- Clear All Report Definitions.