

## Custom Reports (Option)

### *Purpose:*

Custom Reports allow the system owner to save report selection criteria for any reports within the system. This allows quick, consistent reporting from experienced or inexperienced users. Custom Reports also standardize system reporting within the organization. Custom Reports are required to support 'Triggered Reports'. Triggered Reports are automatically Emailed to predefined contacts or groups of contact based on time (every Monday morning) or events (an Alarm).

### *Assumptions:*

Your system is configured so reports are possible. You have entered inventory or item movements. One or more Custom Reports have been defined.

### *Effects:*

Assigns a 'Report Menu' button or a Custom Report number to an owner defined Custom Report.

### *Inputs:*

Owner's Custom Report definitions. User selections

### *Returns:*

'Button' and numbered Custom Reports.

### *Notes:*

**ContainerTRACKER**<sup>®</sup> supports 27 'Button' reports, 9 in each of three (3) categories. And it supports 31,900 numbered 'Custom Reports'. Custom Reports are defined by the user. Report creation requires the user to select report criteria from the 'Transaction' screen, the 'Inventory' screen or the 'Reports Menu' screen. When the selected report is viewed a user, with appropriate privileges, can save the definition of the viewed report as a 'Custom Report'.

Date ranges used in report selection are dynamic. If a transaction report is defined for 'Last Month', the 'Custom Report' will dynamically calculate the dates for 'Last Month' based on the computer date. If a date range is specified by selecting specific dates, those literal dates are included in the 'Custom Report'.

### *Overview:*

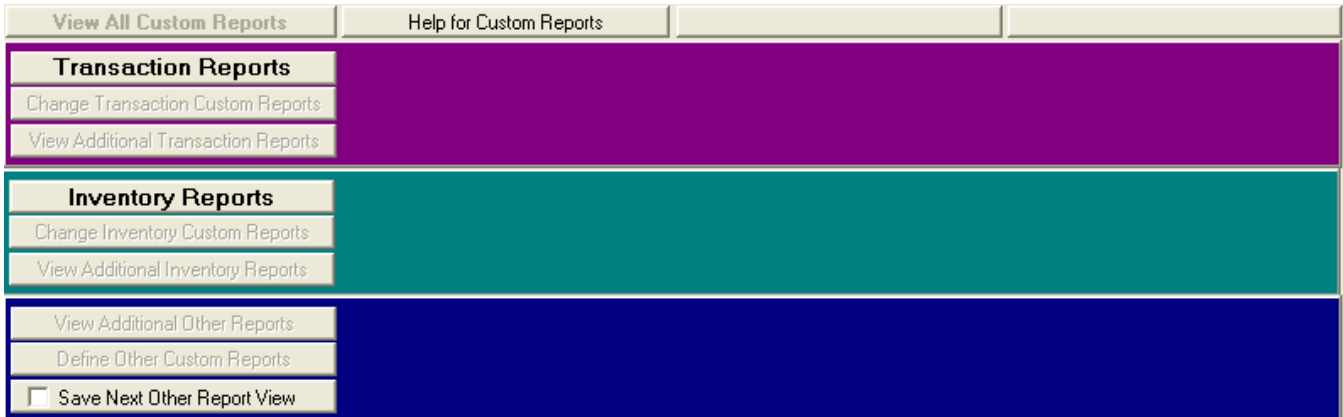
Most of the communications in a cyclic asset system are between specific partners. Their conversation rarely includes the inventory of every 'Location' and 'Status' within the system. More often it concerns inventory of an item at one location or the history of movements between two locations. These very specific reports communicate the required control information rather than all the data associated with system performance. **ContainerTRACKER**<sup>®</sup> allows to user to select report criteria from a graphic interface. This gives the user the ability to easily define millions of reports. Often these reports are used over and over again.

Custom Reports enable the user to select report criteria once, save it, then have is easily available for the next dozen or hundreds of times you create the same report. This allows inexperienced users to create sophisticated reports easily without training. It also helps an organization standardize reports.

### Custom Reports (Option)

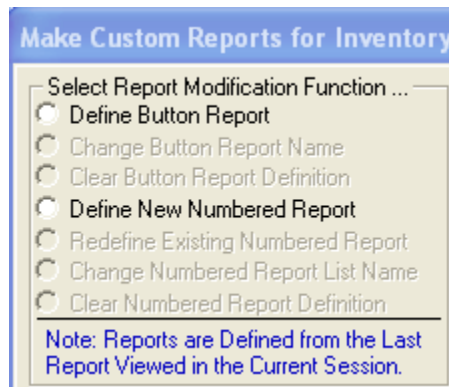
**Custom Report Creation:**

The User accesses 'Custom Report' features through the main menu. Before any 'Custom Reports' are defined the top half of the 'Reports Menu' screen will be similar to the one shown below.



Because no 'Custom Reports' have yet been defined many of the options are disabled (grayed out).

The user selects appropriate report criteria and views the resulting report to ensure it is appropriate. When they return from the 'Viewer' to the report definition screen a 'Make Custom Report' button will be enabled. When the user clicks on the 'Make Custom Report' button a 'Define Custom Reports' screen will display. The upper-left corner resembles the one below.



The user can select to 'Define Button Report' or 'Define New Numbered Report'. There are 27 screen buttons that can be defined. Normally, these are defined before creating 'Numbered Reports' but you may use either.

### Custom Reports (Option)

Our example shows a 'Button' report. When the user selects 'Define Button Report' the center of the screen resembles the one below.

Select Report to Modify

- 1  Custom Report 1
- 2  Custom Report 2
- 3  Custom Report 3
- 4  Custom Report 4
- 5  Custom Report 5
- 6  Custom Report 6
- 7  Custom Report 7
- 8  Custom Report 8
- 9  Custom Report 9

Undefined Reports Appear in Blue.

When the user selects the report button they wish to define, the area of the screen below the 'Select Report to Modify' panel looks similar to the one below without the entered text..

Button Report Name

Enter the New or Changed Report Name

Aluminum Widget Inventory

Your entered Report Name will appear as shown in the Sample Report Button.

Aluminum Widget Inventory

Sample Report Button

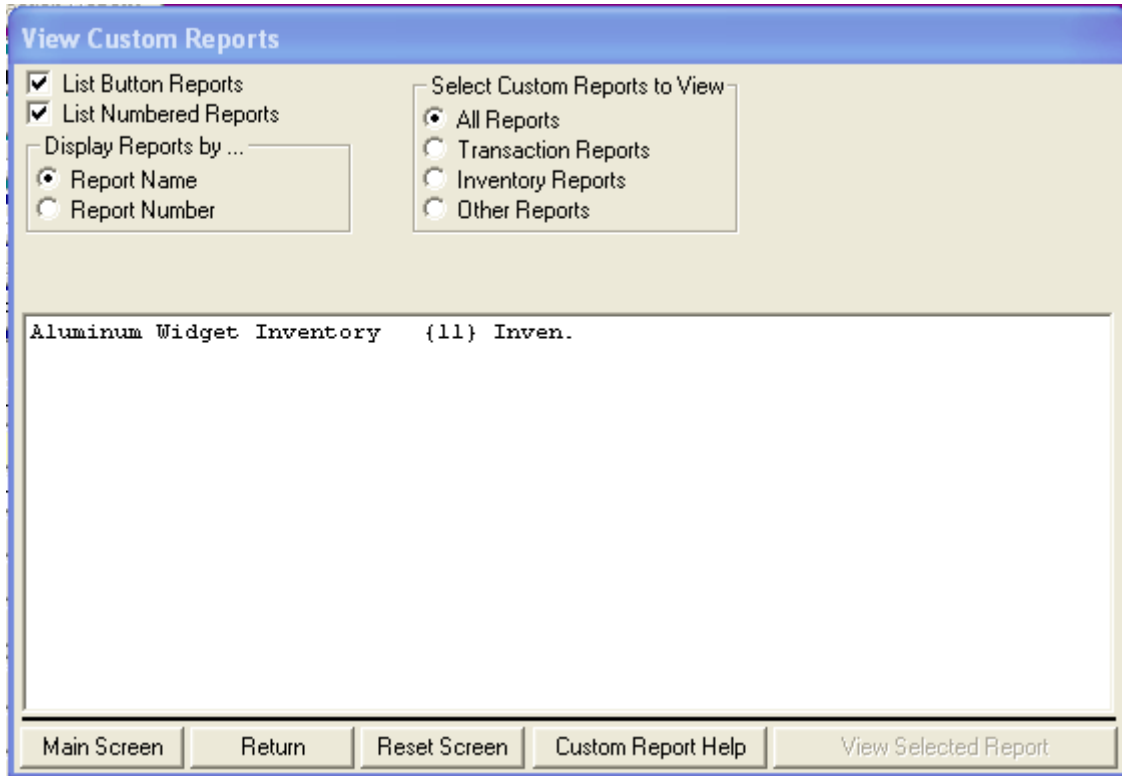
The user then types in the text that will display on the 'Button' face and saves the 'Custom Report'. After a 'Custom Report' is defined, the top half of the 'Reports Menu' screen will be similar to the one below.

<b>View All Custom Reports</b>	Help for Custom Reports		
<b>Transaction Reports</b>			
Change Transaction Custom Reports			
View Additional Transaction Reports			
<b>Inventory Reports</b>	Aluminum Widget Inventory		
Change Inventory Custom Reports			
View Additional Inventory Reports			
View Additional Other Reports			
Define Other Custom Reports			
<input type="checkbox"/> Save Next Other Report View			

Notice there is a new button with the text entered by the User. Clicking on that button will produce the same report as the user defined through their selections (as many as ten). As each 'Custom Report' (button type) is defined, another 'Reports Menu' screen button is defined.

### Custom Reports (Option)

When numbered reports are defined they are accessed through the View Custom Reports screen. It is similar to the one shown below.



The user selects the appropriate 'Custom Report' from the list and clicks on the 'View Selected Report' button to display the 'Custom Report'. All 'Custom Reports' can be viewed this way even if they are defined as a 'Button Report'. This gives the user access to the 31,927 possible 'Custom Reports'