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Using Custom Reports

Custom Reports

Why? -There are three reasons to create customized reports, they are;

1. To save complicated selection patterns for easier reporting,
2. To standardize generated reports, and
3. To automatically email specific reports to others.

How? – Custom reports are defined after viewing a report before the screen is reset. If your screen has a 'Refresh Screen After Viewing' checkbox make sure it is NOT checked. This will always disable the 'Define Custom Report' button because there are no 'Viewed' settings saved. When it is checked your selections are reset as soon as Viewing is complete. The normal process to define a Custom Report is;

1. Select the report criteria in the normal manner,
2. View or view and print your report to ensure it is what you want. If you have selected the 'Define Report without Viewing' checkbox you need not View or Print. Then,
3. Click on the 'Define Custom Report' button and follow the on-screen instructions.

When a Custom Report is defined, you can assign it to a button or you can number it. The Custom Reports assigned to buttons can be ran by clicking the corresponding button.

Viewing Custom Reports **–** There are two methods to view defined Custom Reports. When assigned to a 'Reports Menu' button you just click on the corresponding button. This gives you access to 27 reports. The other 31,000 reports are selected in a variety of ways depending on the type of report and the function you are performing. All these methods call a common Custom Report viewing screen. Each different view button configures the Custom Reports list differently. The following table identifies the several ways to access the Custom Report viewing screen.

Screen Button Name	Button Located On	Custom Reports Listed
View All Custom Reports	Reports Menu	All Numbered Reports
View Additional Transaction Reports	Reports Menu	All Numbered Transaction Reports
View Additional Inventory Reports	Reports Menu	All Numbered Inventory Reports
View Additional Other Reports	Reports Menu	All Numbered Other Reports
View Existing Reports	Define Custom Reports Screen	Numbered Reports for Defined Type

The different buttons used to access the 'View Custom Reports' screen define the type of reports initially listed. Once on the 'View Custom Reports' screen is displayed you can select other list methods. You can list and View any Custom Report from the 'View Custom Reports' screen regardless of how it was defined (button or numbered) or what reports it initially lists.

Capacity – You can define approximately 32,000 Custom Reports in three categories; Transactions, Inventory, and Other. Each category can have nine (9) assigned buttons for popular Custom Reports. This allows often-used Custom Reports to be generated by a single button click.

Custom Report Date Ranges – When report dates are selected by date option rather than by entering the date range, your Custom Reports will automatically translate the dates. That means that a Custom Report defined for 'This Month' will always print data from the current month regardless of when the

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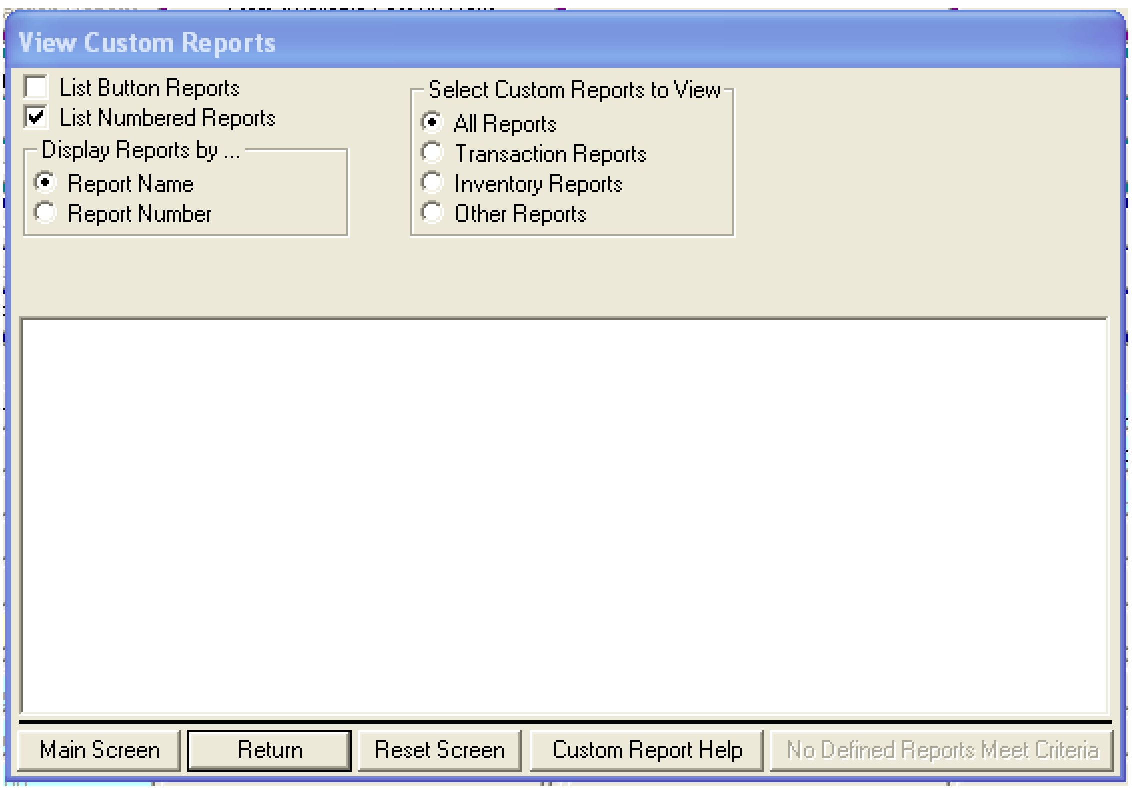
report is run. If you enter a date range manually for a Custom Report, that date range will not be translated.

Blank Reports – Complicated selections may produce an empty report if there is no data that meets the selection criteria of the Custom Report. If there is no data while defining the Custom Report, you can still save it. To do this you need to check the 'Define Report without Viewing' checkbox. This allows you to save a report although the current data may produce an empty report. Since it can't be Viewed, (there is no appropriate data), you take a greater chance of defining the Custom Report incorrectly.

The Custom Reports Viewing Screen – Whenever you wish to view a numbered report you will eventually arrive at the Custom Reports Viewing screen. From this screen you can View and then Print (optionally Export and/or Email) any defined Custom Report. The Custom Reports Viewing screen is shown below.



Notice that the screen has checkboxes and option buttons to allow you to select the Custom Report you want to view in the most convenient manner. When the 'View' screen is presented, it will have different options selected depending on where you were in the program when the screen was called. The screen above was called from the 'Reports Menu', 'View All Custom Reports' button. When the center portion of the screen is blank as shown above, no currently defined reports meet the selection criteria. The screen below shows that 11 button reports have been defined. These correspond to the button shown in the strips from the Reports Menu. The number in the braces, {} is the Custom Report number. Button reports have report numbers of 1-9, 11-19 and 21-29. Numbered reports have report numbers of 100 – 32,000

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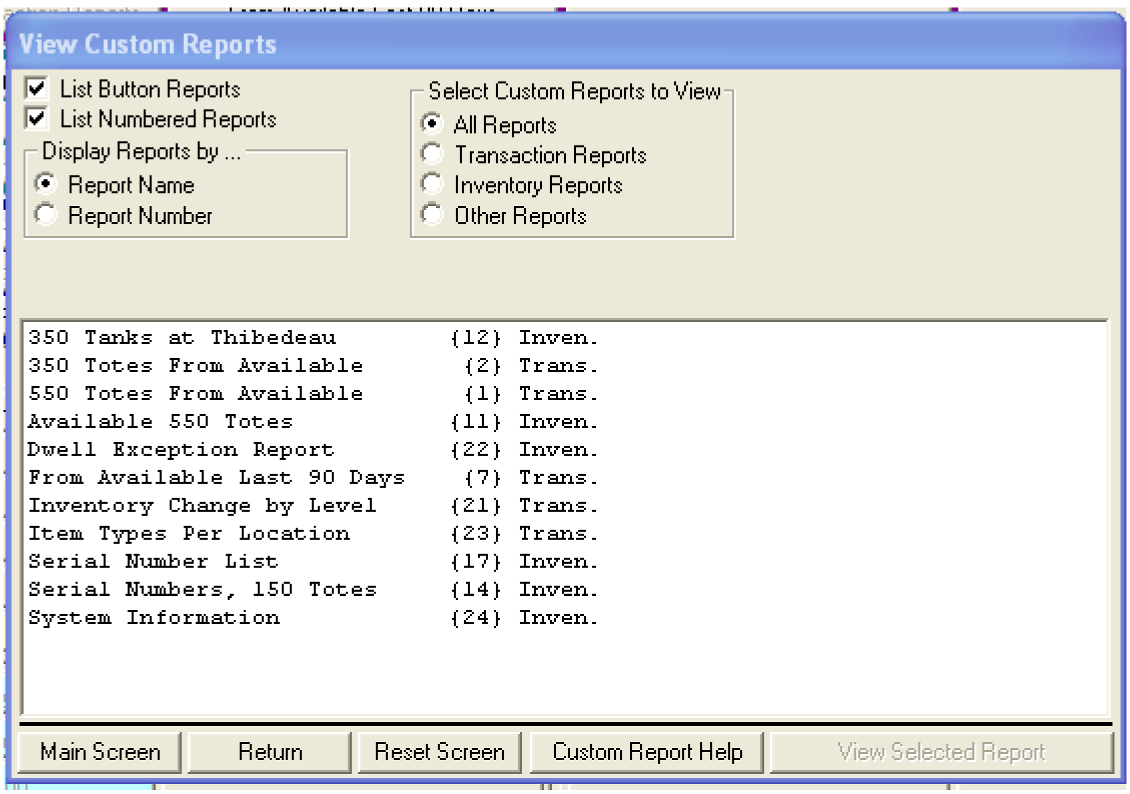

To View or View and Print and report click on its name. Click the 'View Selected Report' button. The corresponding Custom Report will display in the normal report screen.