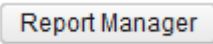


Custom Report Creator

- Generate New Custom Report
 - Select Object
 - Select Properties
 - Configure Filters
 - Generate Report
- Restore Custom Report
- Import Report
- Save Custom Report
- View Saved Reports

The custom report creator option allows for dynamic reporting of all data objects in USAS-R. It allows the user to filter the data using advanced search criteria, determine which columns to include on the report and the order of the columns, and do control breaks with totals. The user can output to a variety of formats including text, pdf, excel, and csv format, along with other lesser known formats, and select page size and orientation. The report definitions can be saved under a given name under 'Save Report'. Once a report definition is saved it will appear on the [Report Manager](#) grid as well as in the 'Restore' drop-down in the 'Custom Report Creator' menu option. If the report definition is selected from the restore drop-down or viewed in the [Report Manager](#) all report criteria will be restored as defaults and can then be overridden as needed before

generating the report. The user may wish to view a listing of saved reports which can be done by clicking on the . This will then take them into the [Report Manager](#).

Detail Report

Select Object Restore Import Report Save As Save Report Report Manager

There are many different ways to generate a Custom Report.

Generate New Custom Report

1. From the Report menu select 'Custom Report Creator'

2. Select Object

1. Available Objects are listed in the Select Object Drop-down

3. Select Properties

1. Reportable properties are available for nearly all possible related data types. The properties within those related data types are represented in an expandable tree format. Properties are selected by either double clicking on the properties on the left or drag and drop them into the box on the right. Once the user has selected the desired properties, they can order them in the box on the right as they wish the columns to appear on the report by drag and drop. Properties may be removed by clicking on the



beside the property. Within the properties selected, the user will need to determine how to sort the report. Sorting is accomplished by choosing a number under the Sort Priority column. In order to control break or page break by a property it must first be assigned a sort priority.

Select Object: CashAccount | Restore: Cafeteria Fund Report | Import Report | Save As: Cafeteria Fund Report | Save Report | Report Manager

Properties:	Select Properties	Configure Filters	Generate Report					
Display Name	Suppressed	Sort Priority	Sort Order	Suppress Repeating	Control Break	Page Break	Function	Remove
Full Account Code	<input type="checkbox"/>	1	Ascending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		X
Description	<input type="checkbox"/>	0	Ascending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		X
Initial Cash	<input type="checkbox"/>	0	Ascending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sum	X
MTD Received	<input type="checkbox"/>	0	Ascending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sum	X
FYTD Received	<input type="checkbox"/>	0	Ascending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sum	X
MTD Expended	<input type="checkbox"/>	0	Ascending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sum	X
FYTD Expended	<input type="checkbox"/>	0	Ascending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sum	X
Current Fund Balance	<input type="checkbox"/>	0	Ascending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sum	X
Current Encumbrance	<input type="checkbox"/>	0	Ascending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sum	X
Current Unencumbered Balanc	<input type="checkbox"/>	0	Ascending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sum	X

2. Customize Properties

1. For each property, the user may customize the following:

1. **Suppressed:** the property will not appear on the report. This is useful if the user selects a property for control break purposes but does not want it to appear on each detail line of the report.
2. **Sort Priority:** the order in which the report will be sorted
3. **Sort Order:** sort the property in ascending (lowest to highest) or descending order
4. **Suppress Repeating:** repeating properties will not appear on the report.
5. **Control Break:** if the property changes, it will bold the change. For example if you run a budget report and sort /control break on the fund every time there is a new fund it will bold the fund number.
6. **Page Break:** advance to the next page when the property value changes
7. **Function:** available on a numeric property which will allow the user to get subtotals, average, min or max
8. **Remove:** removes the property from the report.

4. Configure Filters

1. Allows the user to include or exclude specific properties within the object. For example when selecting the object 'Budget' and the user only wants to see the general fund they can use the configure filter screen to include only the general fund budget accounts. Please refer to the Grid section of the [Navigation](#) chapter for more information on how to use the advanced search.

1. Users have the ability to save their current query and load any previously saved queries from the advanced search . Any saved queries for that object will appear in a drop-down, the query will be applied immediately upon selecting that option from the drop-down.

5. Generate Report

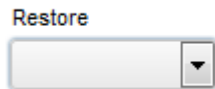
1. Report Options - choose the desired options from the drop-downs

1. Format: the report can be saved as: PDF (download), PDF (inline), Comma Separated Values, Excel, View (html), Plain Text, XML or Jasper Report Design
 2. Page Size: Letter, Legal, Halfletter, Note, Ledger
 3. Orientation: Portrait or Landscape
 4. Name: Enter the name to be displayed on the top of the report
2. Save Report: To save the report settings to be restored later, enter a name in the save as box and click on Save Report
 3. Click on 'Generate Report' to create the report using the format specified

Restore Custom Report

Previously Saved Reports may be restored to be generated again or to make changes and generate a new report.

1. From the Report menu select 'Custom Report Creator'



2. Select the desired Report Name from the Restore drop-down

1. Report definitions will be applied immediately upon selecting the report name from the drop-down

3. Make any desired changes and create the report by clicking the tabs



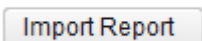
the report.

to select and customize properties, configure filters and generate

Import Report

Users can download their own previously saved report definitions via the Saved Reports and share them with others. For example a saved report may be downloaded by a user and then emailed to another. In order to generate a report definition that has been shared by a different user it has to be imported into the custom report option.

1. From the Report menu select 'Report Manager'



2. Click on
3. Browse to find the desired report and once it has either been double clicked or selected and open clicked in the browser pop-up window the report definition is applied immediately.
4. Make any desired changes and create the report by clicking the tabs



the report.

to select and customize properties, configure filters and generate

Save Custom Report

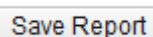
Users can save report definitions. Previously saved reports are managed in the [Report Manager](#)

1. From the Report menu select 'Custom Report Creator'
2. Make desired report selections

Save As

Save Report

3. Enter in a Report Name in the box beside the Save Report button



4. Click on

View Saved Reports

Users may view saved reports via the [Report Manager](#).

1. From the Report menu select 'Report Manager'. This will take a user to the Report Manager grid.