

# Custom Report Creator

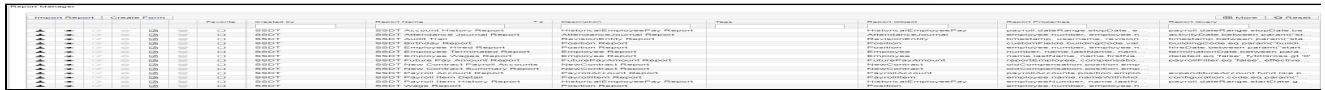
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The **Custom Report Creator** option allows for dynamic reporting of all data objects in USPS-R. It allows the user to filter the data using advanced search criteria, determine which columns to include on the report and the order of the columns, and 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

[Report Manager](#)

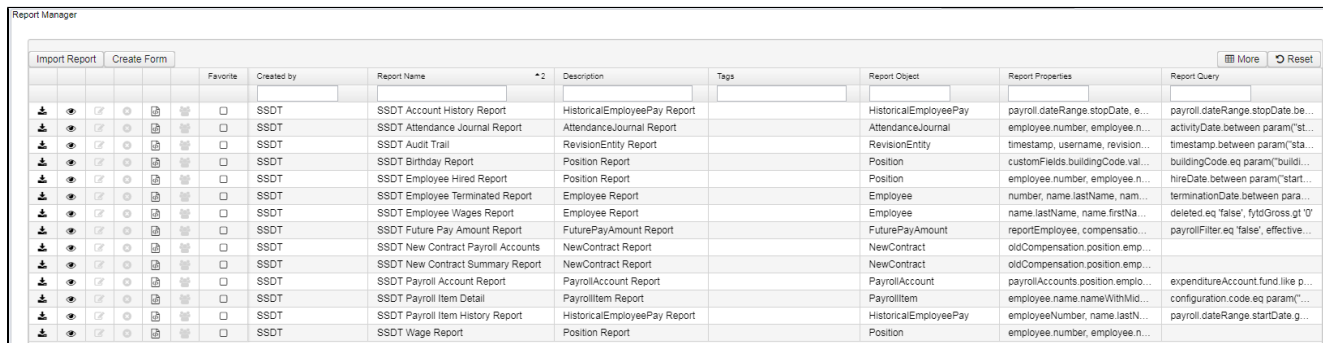
before generating the report. The user may wish to view a listing of saved reports which can be done by clicking on the [Report Manager](#). This will then take them into the [Report Manager](#).

'Select Object' or choose a saved report from the 'Restore' drop down . A file can be imported by using the 'Import Report' option:



Report Name	Description	Report Object	Report Properties
SSDT Account History Report	HistoricalEmployeePay Report	HistoricalEmployeePay	payroll.dateRange.stopDate, e...
SSDT Attendance Journal Report	AttendanceJournal Report	AttendanceJournal	employee number, employee n...
SSDT Audit Trail	RevisionEntity Report	RevisionEntity	timestamp, username, revision...
SSDT Birthday Report	Position Report	Position	customFields buildingCode val...
SSDT Employee Hired Report	Position Report	Position	employee number, employee n...
SSDT Employee Terminated Report	Employee Report	Employee	number, name.lastName, nam...
SSDT Employee Wages Report	Employee Report	Employee	name.lastName, name.firstNa...
SSDT Future Pay Amount Report	FuturePayAmount Report	FuturePayAmount	reportEmployee, compensatio...
SSDT New Contract Payroll Accounts	NewContract Report	NewContract	oldCompensation.position emp...
SSDT New Contract Summary Report	NewContract Report	NewContract	payrollAccounts.position emp...
SSDT Payroll Account Report	PayrollAccount Report	PayrollAccount	employee.name.nameWithMid...
SSDT Payroll Item Detail	PayrollItem Report	PayrollItem	employeeNumber, name.lastN...
SSDT Payroll Item History Report	HistoricalEmployeePay Report	HistoricalEmployeePay	employee number, employee n...
SSDT Wage Report	Position Report	Position	employee number, employee n...

The 'Report Manager' option gives you a listing of all report definitions saved from the detail report view:



Import Report	Create Form	Favorites	Created by	Report Name	Description	Tags	Report Object	Report Properties	Report Query
			SSDT	SSDT Account History Report	HistoricalEmployeePay Report		HistoricalEmployeePay	payroll.dateRange.stopDate, e...	payroll.dateRange.stopDate be...
			SSDT	SSDT Attendance Journal Report	AttendanceJournal Report		AttendanceJournal	employee number, employee n...	activityDate between param("st...
			SSDT	SSDT Audit Trail	RevisionEntity Report		RevisionEntity	timestamp, username, revision...	timestamp between param("sta...
			SSDT	SSDT Birthday Report	Position Report		Position	customFields buildingCode val...	buildingCode eq param("buildi...
			SSDT	SSDT Employee Hired Report	Position Report		Position	employee number, employee n...	hireDate between param("start...
			SSDT	SSDT Employee Terminated Report	Employee Report		Employee	number, name.lastName, nam...	terminationDate between para...
			SSDT	SSDT Employee Wages Report	Employee Report		Employee	name.lastName, name.firstNa...	deleted.eq 'false', ftydGross gt '0'
			SSDT	SSDT Future Pay Amount Report	FuturePayAmount Report		FuturePayAmount	reportEmployee, compensatio...	payrollFilter.eq 'false', effective...
			SSDT	SSDT New Contract Payroll Accounts	NewContract Report		NewContract	oldCompensation.position emp...	expenditureAccount.fund like p...
			SSDT	SSDT New Contract Summary Report	NewContract Report		NewContract	payrollAccounts.position emp...	configuration code eq param("...
			SSDT	SSDT Payroll Account Report	PayrollAccount Report		PayrollAccount	employee.name.nameWithMid...	payroll.dateRange.startDate g...
			SSDT	SSDT Payroll Item Detail	PayrollItem Report		PayrollItem	employeeNumber, name.lastN...	
			SSDT	SSDT Payroll Item History Report	HistoricalEmployeePay Report		HistoricalEmployeePay	employee number, employee n...	
			SSDT	SSDT Wage Report	Position Report		Position	employee number, employee n...	

## SSDT Reports Definitions

SSDT has provided several template reports (listed above). All SSDT created reports are displayed with the username 'SSDT'. You won't be able to change the report name, delete or have the ability to share the reports with users with a specific role because these reports are available to everyone. The list of SSDT created reports will continue growing as we add more template report definitions.

## 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.

Detail Report

Select Object: Employee Restore:  Import Report:  Save As:  Save Report:  Report Manager:

Properties:

- Accred District Experience
- Address
  - City
  - Country
  - Foreign Address
  - Postal Code
  - Province
  - State
  - Street 1
  - Street 2
- Authorized Experience
- Birth Date
- Building Experience
- Check Distribution
- Credential ID
- Degree Type
- Concealed
- District Experience
- E CE Qualification
- Eligible For Retirement
- Email Direct Deposit
- Emis Id
- Employee Photo
- FYTD Gross
- FYTD Net

Display Name	Suppressed	Sort Priority	Sort Order	Suppress Repeating	Control Break	Page Break	Function	Remove
Id	<input type="checkbox"/>	0	ASCENDING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="button" value="x"/>
Credential ID	<input type="checkbox"/>	0	ASCENDING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="button" value="x"/>
First Name	<input type="checkbox"/>	0	ASCENDING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="button" value="x"/>
Last Name	<input type="checkbox"/>	0	ASCENDING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="button" value="x"/>
Street 1	<input type="checkbox"/>	0	ASCENDING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="button" value="x"/>
City	<input type="checkbox"/>	0	ASCENDING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="button" value="x"/>
State	<input type="checkbox"/>	0	ASCENDING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="button" value="x"/>
Postal Code	<input type="checkbox"/>	0	ASCENDING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="button" value="x"/>
Birth Date	<input type="checkbox"/>	0	ASCENDING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="button" value="x"/>
Check Distribution	<input type="checkbox"/>	0	ASCENDING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="button" value="x"/>
Gender	<input type="checkbox"/>	0	ASCENDING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="button" value="x"/>
Hire Date	<input type="checkbox"/>	0	ASCENDING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="button" value="x"/>

#### 4. Customize Properties

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

- 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.
- Sort Priority:** the order in which the report will be sorted
- Sort Order:** sort the property in ascending (lowest to highest) or descending order
- Suppress Repeating:** If the same value appears on consecutive detail lines, suppress the repeating value. Example: This may be useful if the user were creating a listing of employee checks. They may want the employee number and name to print on the first line, but not print again until the employee changes.
- 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.

If the user wants to 'Control Break' by a particular property it must be included in the 'Sort Priority' column.

- Page Break:** advance to the next page when the property value changes
- Function:** available on a numeric property which will allow the user to get subtotals, average, min or max

#### 2. Configure Filters

- Allows the user to include or exclude specific properties within the object. For example when selecting the 'Last Paid' and the user only wants to see the employees Paid from 01/01/2017 and after, they can use the configure filter screen to include only employees Last Paid Greater than 01/01/2017. Please refer to the Grid section of the [Navigation](#) chapter for more information on how to use the advanced search.

Display Name	Operation	Filter Value	Remove
Last Paid	Greater _ Or _ Equ	01/01/2017	<input type="button" value="x"/>

2.

3. **Operation** is a process or validation to determine a particular presence or quantity:

- Equals-** equal
- One of** - list of possible values; must be separated by commas
- Not equals-** not equal
- Like** - begins with
- Contains** - consists of
  - Positions example: "positionDescription.contains sub" will search for Positions with the word "sub" anywhere in the Position Description field.
- Between** - range; values must be separated by commas
  - Payments/Payroll: "paymentTransactions.payment.number.between 10247,10273" will search for Payroll numbers between 10247 and 10273
- is Null()** - blank
- Not Null()** - not blank
- Greater than-** greater than
- Greater or equal** - greater than or equal to
- Less than-** less than
- Less or equal-** less than or equal to
- Not one of** - exclude list of possible values; must be separated by commas
- sort** - to place in order; always places in ascending order only

- attendance example: "activityDate.sort" will sort attendance by activity date
- **Type**-See Property Fields below

**Filter Value** - is a value entered by the user based on what they are searching for and the property field type; for some operations this may be a list or range with the values separated by commas.



4. **Remove** is used to delete a property field
3. 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.
4. **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

5.

## 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

to select and customize properties, configure filters and generate the report.

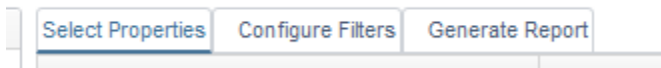
## Import Report

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



to select and customize properties, configure filters and generate the report.

## 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

Save Report

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.