

Report Definitions

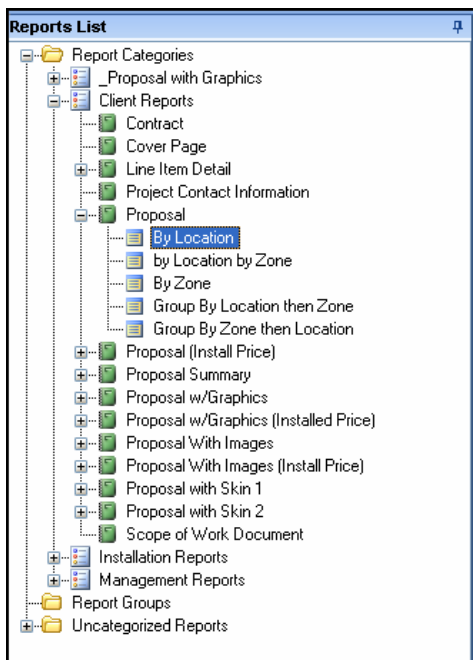
Overview

Reports that support grouping, sorting, or parameters allow for the creation, deletion, and editing of report definitions. Report Definitions represent a saved group of settings that determine how a report will generate.

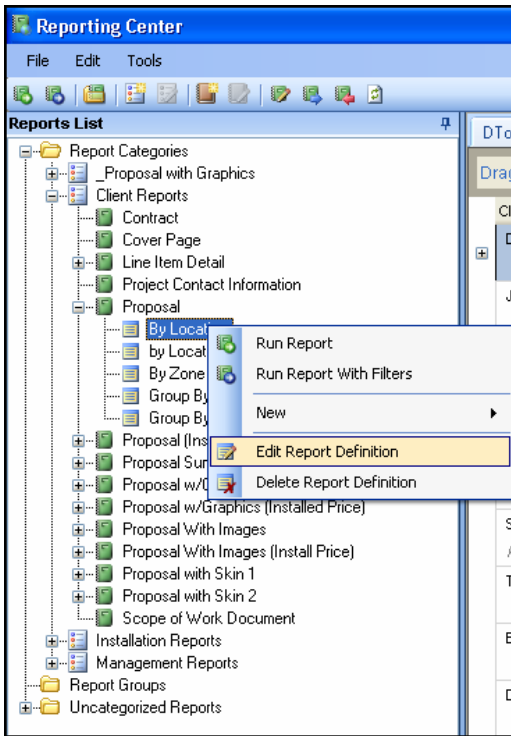
The ability to create report definitions allows users to persist one or more ways they want their report to generate. The standard reports that ship with SI5 may have one or more report definitions predefined. These definitions are simply sets of configurations that D-Tools included “out of the box”. These “out of the box” definitions are by no means what the user is limited to. Any user can add new definitions, edit the “out of the box” definitions, or delete them and start fresh.

Edit Report Definitions

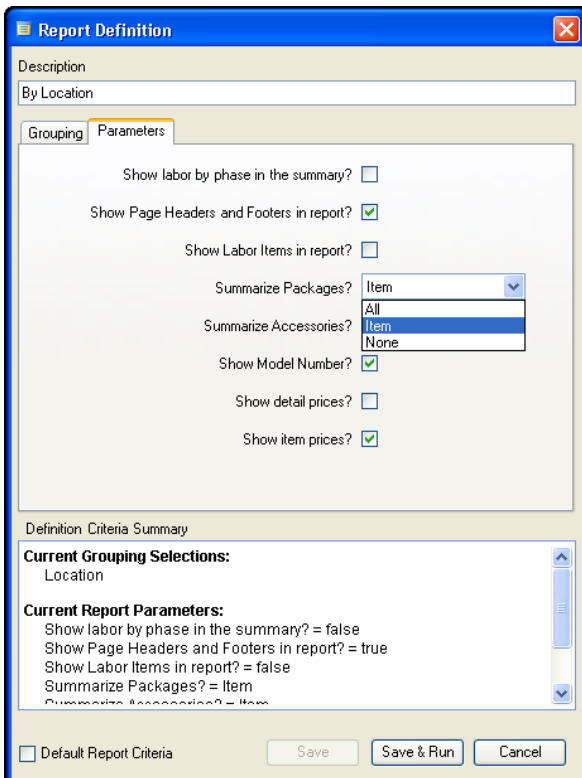
Select a “Report Definition” that is attached to a report.



Right click on the report definition and select “Edit Report Definition”

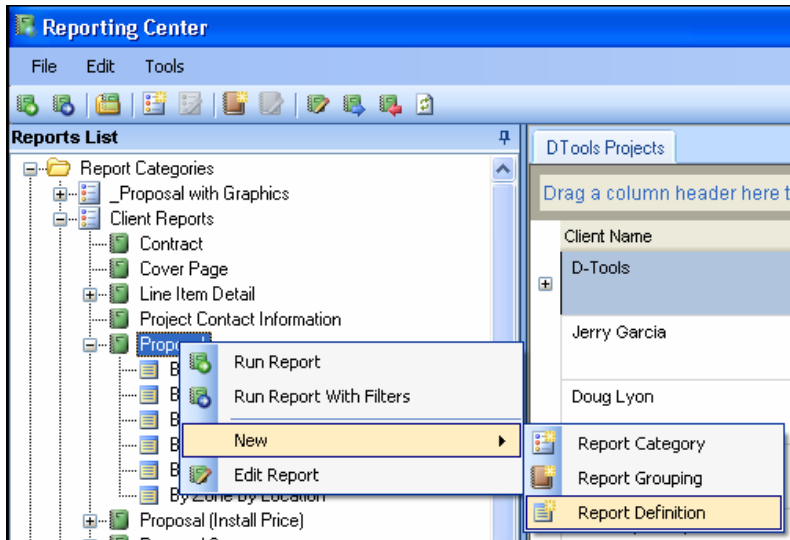


Select the “Parameters” tab and ensure the “Summarize Packages?” parameter is set correctly (“All” will summarize all packages, “Item” will summarize based on the setting on the package through SI, and “None” will show all detail regardless of the setting on the item.



Adding Report Definitions

Select the report.



Give the Report Definition a name (something descriptive, but user definable).

Set its Group settings, Sorting setting or Parameters values (availability depends on the report).

Click "Save" to close the window and add the Report Definition or "Save and Run" to execute the report against the new report definition

General Notes:

1. The concept of a "Report Definition" was created to allow users to save one or more ways a report could be generated (By Location, By Location, then Zone, etc).
2. Users can have add/edit/delete all report definitions.
3. Users can create new definitions on any report that supports one or more of the following: Grouping, Sorting, or Parameters
4. Any definition can be set as the "Default Definition". This means, if the report is selected in the "Reports List" and not a specific definition, then the report will be generated based on the "default definition".
5. The name of a definition has no bearing on how the report is generated and presented. If a user edits the "By Location" report definition and changes the "Groupings" to "Zone", then the report will group the project data by zone.
6. Reports that support dynamic "Grouping", most likely require a definition so the report will generate correctly with the group.