

Chapter 14

Custom Reports

As we mentioned in Chapter 13, Gecko Microsolutions takes reports and reporting capabilities very seriously. We know that often to our customers a software product is only as good as the reports it can easily produce. We try to make all of our products rich with many powerful and attractive reports that are easy to create. However, we also know that no matter how many reports our products have in them, we will not always be able to satisfy all of our customer's reporting needs with "off the shelf" reports.

Keeping this in mind, Gecko has developed an easy, powerful report customization option. Gecko's Custom Report option allows you to easily create your own reports by copying an existing T.O.M. report and tailoring it to your own needs. With this feature, you can easily design your own reports and decide what information will and will not be on the reports and how it will look on the reports! You can then run your custom reports directly from your T.O.M. software!

The T.O.M. Custom Report Feature – An Overview

Do You Have To Be A Programmer to Create Custom Reports?

No. The T.O.M. Custom Report feature was designed to be as easy to use as possible but still give you the power you need to create your own reports. The Custom Report feature does require a user that has a little more advanced knowledge of working with computers and is comfortable working with a somewhat more sophisticated program than the average T.O.M. software requires from its users. However, this feature does not require that the user have a background or training in programming.

How Does it Work?

In general, it's based on the idea that you will copy an existing report and use that copy to create a new unique report. You can either copy an existing T.O.M. Report or a report that you have previously created. The benefit to this approach is that by creating a report based on copying an existing report, you save yourself a lot of work and complication by having a base report layout to work from. Also, the type of report that you create your report from tells your T.O.M. software where to allow this report in the software. For example, if you create a new report by copying an existing absence report, your T.O.M. software will know that your new report will also run from the absence screens and not run, for example, from the training screen. Your T.O.M. software will do this all automatically. You won't have to make any settings!

Anatomy of A Report

All reports in your T.O.M. software (even those you create) consist of two basic parts:

1. The Report Description – This is the overall information concerning the report. The description contains the name of the report, a detailed description of the report, where in the T.O.M. software the



report can be run, whether the report should be available to users, and the name of the report design layout file or files. All of this information is stored in the T.O.M. Employee Management reports database `EmpRpts.mdb`, which is found in the same location as your T.O.M. Employee Management Database.

2. **The Report Layout** – This is actual design and structure of the report. The layout contains such information as what data fields are to be on the report, what the report is to look like and what totaling will be on the report. The report layout is contained in a data file that is stored in a folder titled `\EmpReports` that can be found in the same folder as your Employee Management database files. Some of the more sophisticated reports may actually have more than one report layout file. For example, an Employee Profile report may have overall information about an individual employee, then a section that lists all of the employee's absences, another section that lists all the employee's training records, and another section that lists all the employee's training records. Each of these detail sections is called a "sub-report." Each sub-report would be described by their own report layout file. The ability to have reports within reports gives you the capability of creating extremely comprehensive reports!

Can I Change an Existing T.O.M. Report?

Yes and no. You can NOT change the actual report that came with the T.O.M. software. However, you can create a new report by copying that existing report and then change the new copied report.

Can I Create a New Report from Scratch Without Copying an Existing One?

No. To ensure that all the required information needed to run your report in the T.O.M. Software is setup correctly, the T.O.M. Custom Report feature requires that all new reports are created by copying and existing report.

Can I Delete a Report?

Yes, if it is a custom report. You can NOT delete any report that came with the T.O.M. software. You can inactivate, or "hide," a report that came with the T.O.M. software so it does NOT show up in the T.O.M. Report screen.

How do I Know Which Report to Copy?

Find the report that comes the closest in appearance and information to the report you desire. For example, if you desire a report that lists training information about your employees, then you would choose one of the existing training reports to start with. Use Chapter 13 and Appendixes – A.1 – A.8 to review the many report options you have with the T.O.M. Software.

What Happens When You Create a New Report by Copying an Existing One?

When you tell T.O.M. to create a new report by copying an existing report T.O.M. performs the following actions:

1. T.O.M. copies the report layout file(s) to create duplicate report layout files that you can change. When doing this, the T.O.M. software automatically generates a new unique file name. This generated



name will be long complicated name like 83ad00a9-fbe5-4745-8d37-6c203075568e.rpx. Don't worry about remembering it; T.O.M. does that for you. The unique name ensures that there are no other duplicate named files in your Report Layout folder.

2. T.O.M. creates a new report description record in the T.O.M. Reports database. This new record will be similar to the report description record of the report you copied. However, the new report description record will point to the newly created report layout file(s). The report description will tell the T.O.M. software where this report is to be available to be run using the information from the original report that was copied.
3. After copying both the report layout files and the report description, T.O.M. displays the new report description screen for you and allows you to make your changes to both the description and the layout. This is described in greater detail later in this chapter.

What's in this chapter?

This chapter consists of these sections:

- **Searching for Reports.** Explains how to search for reports. You can do this to filter the list of reports displayed in the Report screen.
- **Copying Reports.** Explains how to copy reports. Before you can create a custom report, you need to make a copy of an existing report.
- **Modifying a Custom Report's Layout.** Explains how to use the report customization feature, and includes a detailed sample procedure for customizing a report.
- **Hiding Reports.** Explains how to hide reports that your district does not need. The hidden report does not display in the report list.

Searching for Reports

The Employee Management system ships with more than 100 system reports, meaning that these reports are built in to the system. When you are ready to customize a report, you can filter the list of reports displayed so that you do not have to scroll through the entire list looking for the report you want to customize.

This section includes the following:

- Searching for Reports
- Understanding the Report Search screen

Searching for Reports

1. Select File>Other>Reports (Figure 14-3).

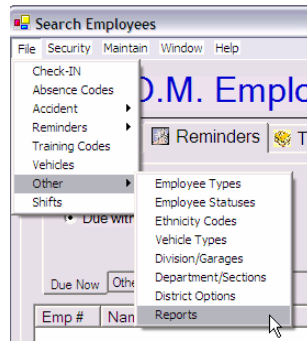


Figure 14-1. Selecting File>Other>Reports

The Report screen appears.

2. Select your search criteria. *(The next section explains the options you can use to search for reports.)*
3. Click the Find Now button. The Employee Management system searches for reports matching your search criteria.

Figure 14-2 shows the results of searching for all training reports, including those that might have been hidden:

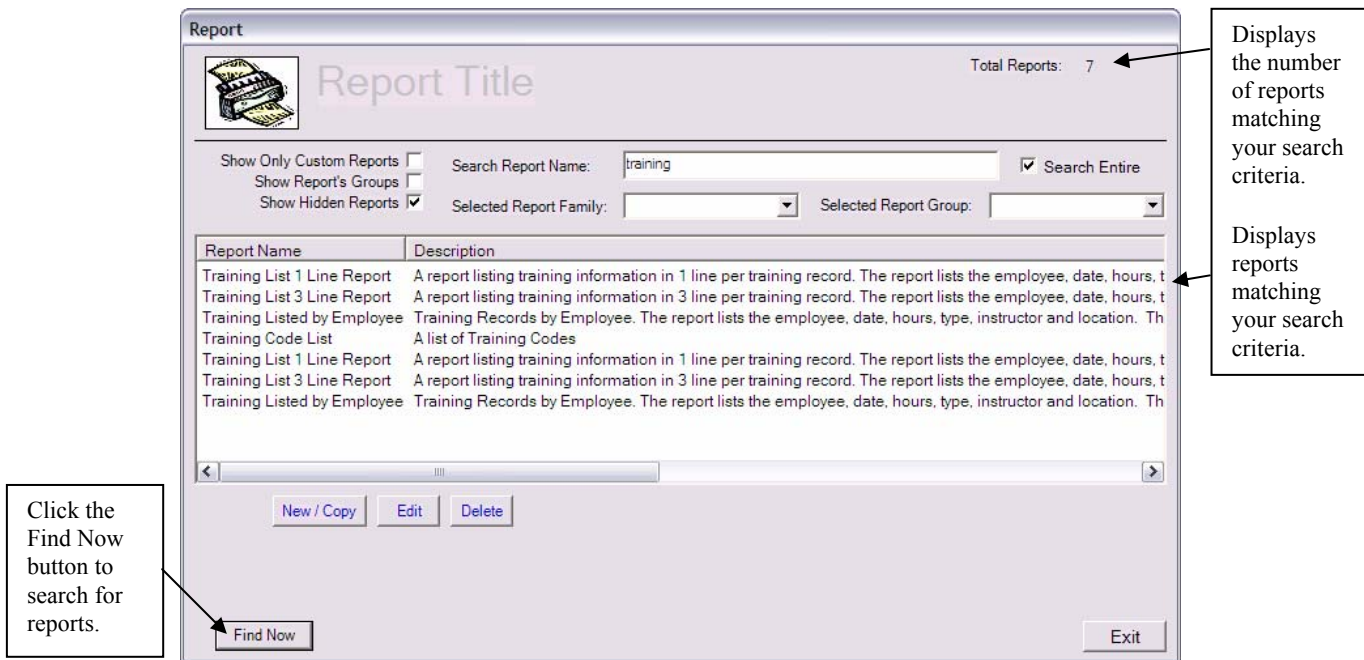


Figure 14-2. Searching for reports



Understanding the Report Search screen

Report

Report Title Total Reports: 106

☐ Show Only Custom Reports
☐ Show Report's Groups
☐ Show Hidden Reports

Search Report Name: ☒ Search Entire
 Selected Report Family: Selected Report Group:

Report Name	Description
Absence Code List	A list of Absence Codes
Absence 1 Line Report - By Code, Employee and Date	A one line report listing employee absence information. The report contains t
Absence 1 Line Report - By Date, Code and Employee	A one line report listing employee absence information. The report contains t
Absence 1 Line Report - By Employee, Date and Code	A one line report listing employee absence information. The report contains t
Absences Listed By Employee	Listing absences by employee. The report contains the employee name and
Absence Summary Report - By Absence Code	A report summarizing absences by Absence Code
Accident Contributing Factor List	A list of contributing factors.
Damage Code List	A List of Accident Damage Codes
Accident Injury List	A list of injury codes.

- **Show Only Custom Reports.** When you click in the checkbox, you will be able to see custom reports. If you have not created any custom reports and you select this option, no reports will display when you click the Find Now button.
- **Show Report's Groups.** When you click in the checkbox, a column containing the report group appears in the display area.
- **Show Hidden Reports.** When you click in the checkbox, reports that are "hidden" will appear. You can hide a report by selecting its name, clicking the Edit button, and deselecting Show. To deselect Show, click in the checkbox to remove the check mark.
- **Search Report Name.** Allows you to type the name of the report you want to search for.
 - » To search for all reports that have the word *Employee* in the title, type *Employee* into this box. In this case, Search Entire should have a checkmark in the checkbox.
 - » To search for all reports that *begin* with the word *Employee*, type *Employee* into this box. In this case, Search Entire should *not* have a checkmark in the checkbox.
- **Search Entire.** This checkbox uses the text you typed into Search Report Name.
 - » When selected, allows you to search using a partial report name, meaning that all reports containing the text you typed into Search Report Name as part of its title.
 - » When this field is not selected, the Employee Management system searches for reports *beginning* with the text you typed into Search Report Name.

NOTE: Because the Search Entire field "looks" at whatever you typed into Search Report Name, the Employee Management system does not use the setting in this checkbox (regardless of whether it is selected) when it searches reports if you do not type any text into Search Report Name.

- **Selected Report Family.** Allows you to search using one of the four report families as your search criteria. Options include: Basic, Specific, Summary, and Profile.
- **Selected Report Group.** Allows you to search using the group the report belongs in as the search criteria. For example, you could see only the reports that display in the employee training screen or the employee notes screen.



Copying Reports

Keep the following in mind when copying reports:

- When you copy a system report, you are using the system report as a template, meaning that you will start with the same information in the system report.
- You will be able to give the copied report a new name. The name you give the report is the name that appears in the report screen when other users choose to select this report to print in the T.O.M. software. For this reason, you should try to use an easy to understand name that accurately describes the report.
- After you give the report a name, the Employee Management system saves the customized report in the appropriate location. For example, if you copy a training report, the new report is automatically saved with the other training reports. That way, you do not have to worry about where to save the file or be concerned whether you saved it in the right place for the system to “see” it and make it available.
- After you copy a system report and give it a name, you can add or remove fields or change the way the report looks (such as changing the fonts). This is discussed in the Modifying a Custom Report’s Layout section later in this chapter.

NOTE: You cannot edit or delete system reports; you can only make copies of them.

To copy a system report:

1. Select File>Other>Reports (Figure 14-3).

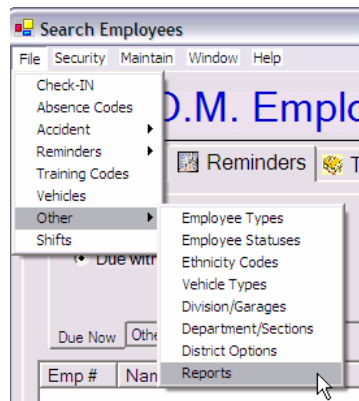


Figure 14-3. Selecting File>Other>Reports

The Report screen appears.

2. Select search criteria as described in the Searching for Reports section described previously in this chapter, and click the Find Now button to search for reports matching your selected criteria.
3. Select the report you want to customize.



Figure 14-4 shows that the Absence 1 Line Report - By Code, Employee, and Date has been selected:

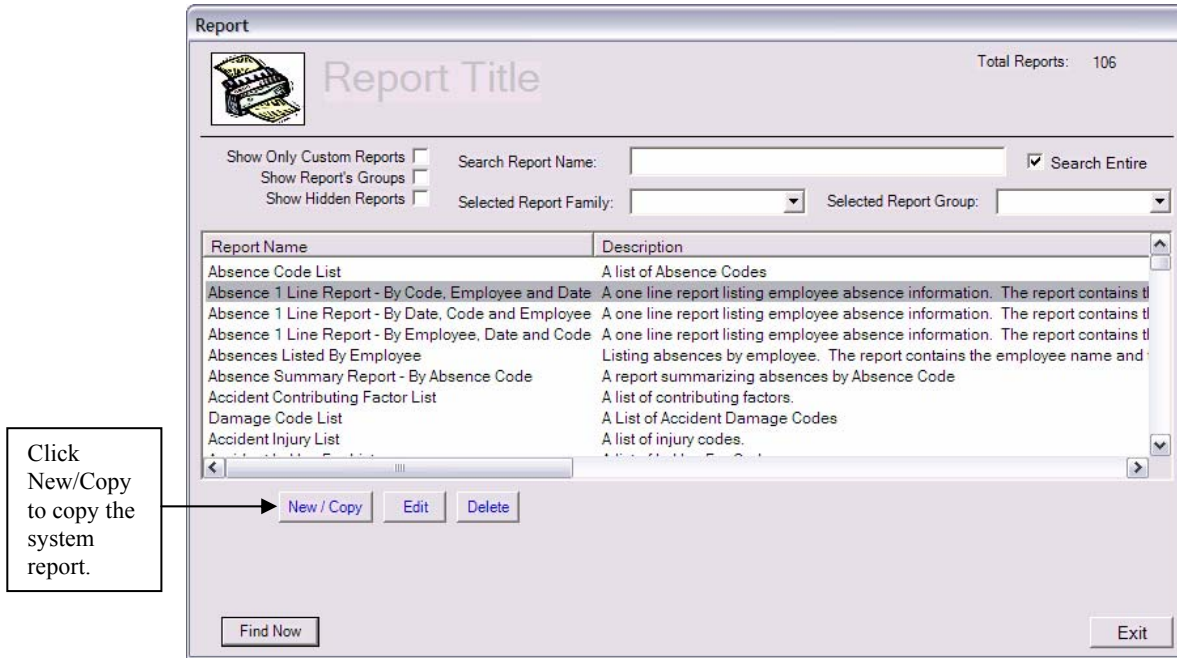


Figure 14-4. Selecting a report to copy

4. Click the New/Copy button. The Copy a Report to Customize screen appears.
5. Type the name you want the report to have. This is the name that appears when you want to generate a report, so you should give some consideration ahead of time to the naming convention you want to use for custom reports.

Figure 14-5 shows the name for the custom report.

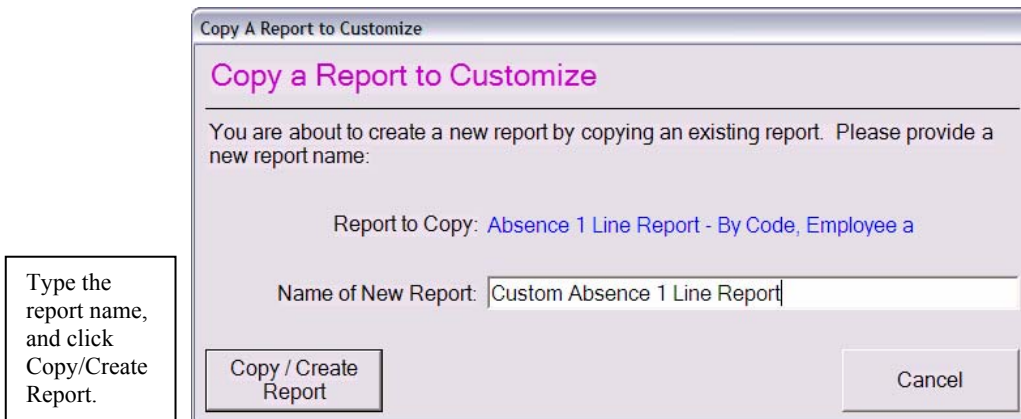


Figure 14-5. Naming a custom report

The Report Description screen appears (Figure 14-6).



Report Details

Report
* Custom Report *

Report Name: Custom Absence 1 Line Report

Description: A one line report listing employee absence information. The report contains the employee, the date and type of absence, hours of absence and a comment. The report is sorted by code, employee name, and date.

☒ :Show Original Report: ABSENCE_LIST_1LINE_BY_CDEMPDT
Report Alias: ABSDET_BY_CDEMPDT

Report Layout(s): (to modify the report design click on the layout that you wish to modify in the list below and then click on the Modify Layout File Button)

Description	Layout
Main Report Layout	f41d879e-d356-44ae-ae65-0feabc51a90...

Modify Layout File

OK Exit

Figure 14-6. Report Description screen

6. Either:

- Click the OK or Exit button to close the screen.

OR

- Continue to the Modifying a Custom Report's Layout section to learn how to change the report's layout.

Modifying a Custom Report's Layout

After you make a copy of a system report and give it a name, you can use the report customization feature to create reports to meet your district's reporting needs.

When you modify the way a report looks or the data it contains, you are actually modifying its layout file. This file contains not only how the report looks but the data that is included in the report.

NOTE: You can only customize reports you have based on system reports or on other custom reports you have already created. You cannot actually change the original T.O.M. report.

This section consists of the following:

- **Selecting the Report Layout File.** Explains how to open the report layout file.
- **Customizing Report.** Explains how to use the report customization feature.
- **Sample Custom Report.** Gives a detailed procedure for customizing a report.



Selecting the Report Layout File

Before you can customize a report, you must create a copy of an existing report. You cannot directly edit the system reports, meaning that these reports are built in to the system. Creating copies of reports was discussed earlier in this chapter in the Copying Reports section.

This section contains the following information:

- Selecting the Report Layout File
- Understanding the Report Description Screen

Selecting the Report Layout File

NOTES:

- *If you already see the Report Details screen (Figure 14-8), skip to step 3.*
- *Also, you can use the search criteria to filter the list of displayed reports. For example, to see only those reports that have already been created by your organization, you could select Show Only Custom Reports and click the Find Now button. Searching reports is discussed in the Searching for Reports section earlier in this chapter.*

1. Select the report you want to modify (Figure 14-7).

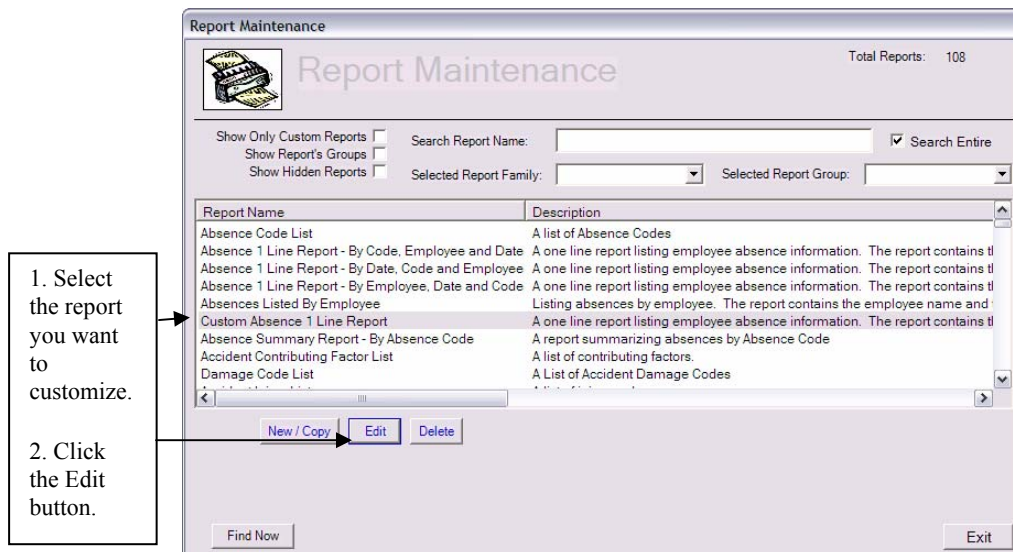


Figure 14-7. Selecting the custom report

2. Click the Edit button. The Report Details screen appears.
3. Select the layout file you want to edit (Figure 14-8).
4. Click the Modify Layout File button (Figure 14-8).
5. Click the OK button (Figure 14-8).

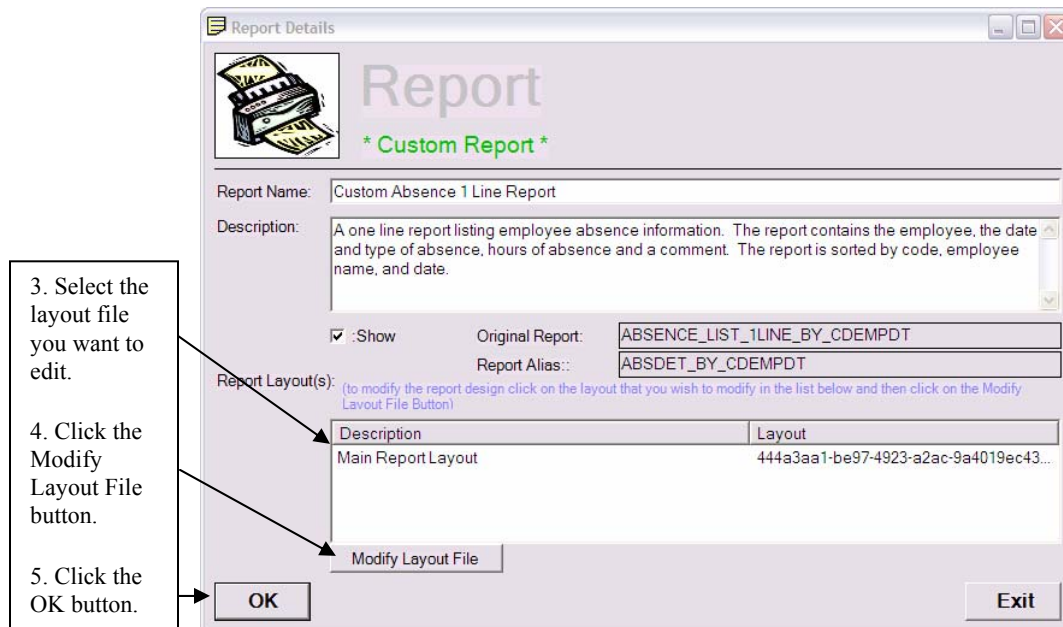


Figure 14-8. Selecting the Layout File

The End User Designer screen appears. This screen and its features are discussed in the Customizing Report section later in this chapter.

Understanding the Report Description Screen

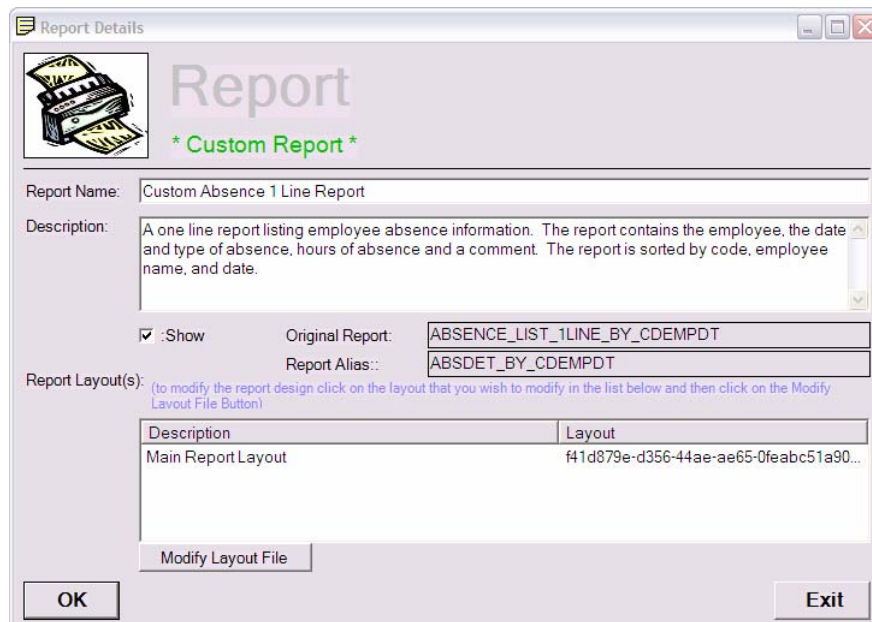


Figure 14-9. Report Details screen

- **Report Name.** Displays the name of the report. You cannot edit this field.
- **Description.** Displays the description of the report. You can edit this field.



- **Show.** When selected, displays this report in the Report Maintenance screen. When this field is not selected, meaning that a checkmark does not appear in the checkbox, the report is does not show on the Report Maintenance screen. You can learn more about this feature in the Hiding Reports section later in this chapter.
- **Original Report/Report Alias.** Displays the file name of the report this report was based on and the alias that has been assigned to this report. These names are for internal purposes and cannot be edited.
- **Report Layout(s).** Displays the layout files associated with this report. It is possible that you will see more than one report layout file displayed in this box. This is because some reports consist of several subreports, each of which has its own layout file.
- **Modify Layout File.** When clicked, displays the selected layout file so that you can edit it.

Customizing Report Layouts

The End User Designer screen allows you to modify a report layout file. This is where you can change the physical makeup and design of a report. The End User Designer screen consists of these parts, and each part is discussed in detail next in this chapter:

- Element Manipulation
- Text Formatting
- Toolbox
- Report Layout
- Fields
- Report Contents

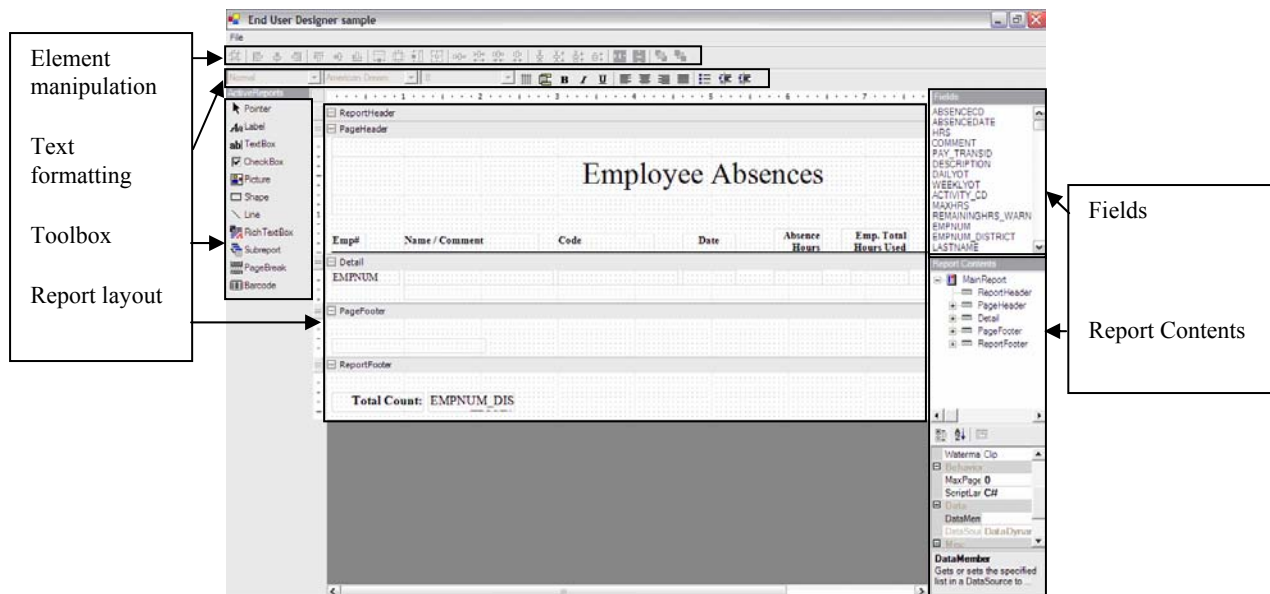


Figure 14-10. End User Design screen



Element Manipulation

Keep the following points in mind when using these icons:

- Click the Pointer icon in the toolbox if you want to select items.
- Some of the icons in this toolbar are only available when you have selected at least two elements in the report layout area.
- To select more than one element:
 - » Hold down your Ctrl key while you click on them.
 - » Click and drag around all the elements you want to select. This is especially helpful when elements you want to select appear next to each other.

Icon	Description	Additional information...
	Aligns the selected element(s) to the grid.	You only need to select one element to be able to use this icon.
	Horizontally aligns the selected elements along their left sides.	When aligning elements: <ul style="list-style-type: none"> • You must select at least two elements to be able to click any of the align icons. • You are aligning the elements, not the text in the elements. To align the text within the element, use the icons on the Text Formatting bar. This is discussed in more detail in the Text Formatting section later in this chapter. • Selected elements align to whichever element you select last. Suppose you want to align three (A, B, and C) elements along their left sides. Select element A by clicking on it, and drag it to the correct position or use the arrow keys on your keyboard to reposition it. Click in the white space so that no element is selected. Hold down your Ctrl key, select elements B and C (the order of selection for these elements does not matter), and then select element A. When you click one of the align icons, elements B and C align to element A.
	Horizontally aligns the selected elements using the center of the elements.	
	Horizontally aligns the selected elements along their right sides.	
	Vertically aligns the selected elements along their top borders.	
	Vertically aligns the selected elements along their center points.	
	Vertically aligns the selected elements along their bottom borders.	
	Resizes the selected elements to the same width.	When resizing elements using the icons: <ul style="list-style-type: none"> • You must select at least two elements to be able to click any of the resizing icons. • Selected elements will be resized, but they do not automatically align themselves. You can use the aligning icons to change the element's position. • Selected elements are resized to whichever element you select last. Suppose you want to two (A and B) elements to be the same size. Select element A by clicking on it. Then, resize it by putting your cursor over one of the handles that appear on the element's borders. Click in the white space so that no element is selected. Select element B and then element A. When you click one of the resizing icons, element B becomes the same size as element A.
	Resizes the element so that it fits within the grid.	
	Resizes the selected elements to the same height.	
	Resizes the selected items to the same height <i>and</i> the same width.	



Icon	Description	Additional information...
	Makes the horizontal space between elements the same.	<p>When vertically or horizontally moving elements:</p> <ul style="list-style-type: none"> You must select at least three elements to be able to click any of these icons. When you click an icon that makes spacing equal, the middle item(s) are spaced equally between the outermost elements. Suppose you select 4 items: A, B, C, and D. When you click one of the equal spacing icons, elements B and C will be evenly distributed between A and D so that all four elements have the same amount of space between them. In this case, the order you select the elements does not matter. When you select one of the icons to increase or decrease spacing, the elements you select first move in relation to the last selected element. Suppose you select three elements in this order: A, B, and C. If you click the Increase Vertical Space icon, elements A and B move away from element C. The space between A and B does not change; what changes is the space between A/B and C.
	Increases the amount of horizontal space between the elements.	
	Decreases the amount of horizontal space between the elements.	
	Removes all horizontal space between the elements so that their borders touch.	
	Makes the vertical space between elements the same.	
	Increases the amount of vertical space between the elements.	
	Decreases the amount of vertical space between the elements.	
	Removes all vertical space between the elements so that their borders touch.	
	Centers the element horizontally within that section, or detail, of the report.	<p>When using these icons:</p> <ul style="list-style-type: none"> You do not need to select more than one element. You are aligning the elements, not the text in the elements. To align the text within the element, use the icons on the Text Formatting bar. This is discussed in more detail in the Text Formatting section later in this chapter. You are aligning items within that section of the report, not in the entirety of the report. For example, if you select an item in the Page Header area, that element is centered within the Page Header area.
	Centers the element horizontally within that section, or detail, of the report.	
	Brings the selected element to the front of other elements.	<p>When sending elements to the front and back, those elements become “layered.”</p>
	Sends the selected item to the back of other elements.	



Text Formatting

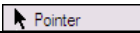

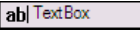
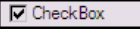
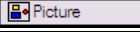
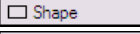
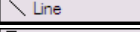
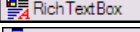
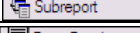
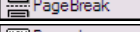
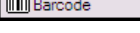
Most of the icons will be familiar to you from word processing programs. All of these icons control the way the text looks within the selected element(s). You can apply these properties to one or more elements.

Icon	Description
	Allows you to apply a style to the selected element(s). You can create new styles by selecting File>Page Setup. This is discussed in the Sample Custom Report section later in this chapter.
	Allows you to change the font of the selected element(s).
	Allows you to change the text size of the selected element(s).
	Toggles between displaying and hiding the grid.
	Causes a pop-up dialog to appear.
	Bolds the text of the selected element(s).
	Italicizes the text of the selected element(s).
	Underlines the text of the selected element(s).
	Allows you to left justify the text within the selected element(s).
	Allows you to center the text within the selected element(s).
	Allows you to right justify the text within the selected element(s).
	Allows you to fully justify the text within the selected element(s).
	<i>(Available only with Rich Text)</i> When you put a rich text control, you import a Word document, then you can work on the document within this control, and use these element controls to format the text.



Toolbox

The toolbox allows you to select elements that you can draw on your report layout. By clicking on a toolbox tool, you specify what kind of element you are placing on your report layout. For example, you would click on the Label element if you want to add text for a heading or instruction on your report.

Icon	Description
 Pointer	Allows you to select controls or sections of the report.
 Label	Allows you to insert a new static label control.
 Text Box	Allows you to insert a textbox, bound to a database field or unbound.
 Check Box	Allows you to insert a checkbox, bound to a database field or unbound.
 Picture	Allows you to insert an image, loaded from a file.
 Shape	Allows you to insert a rectangle, circle or square shape.
 Line	Allows you to insert a line control.
 Rich Text Box	Allows you to insert a rich text control.
 Subreport	Allows you to insert a subreport control to link to another report.
 Page Break	Allows you to insert a page break within a selection.
 Barcode	Allows you to insert an barcode control.

Report Layout

The report layout area is where you “build” the structure of the report. For example, this is where you can add or delete fields from the report. As you learned in the Toolbox section, there are several types of elements you can add to the report. You can then move the elements around by clicking and dragging, using the arrow keys on your keyboard, or using the icons to control where those elements appear. You can also change the way the elements look, for example, by changing their font or adding a background color to them.

However, before you begin adding elements to the report, you should familiarize yourself with this area. First, notice that this area displays the different sections in the report. Figure 14-11 shows that this report consists of these sections: Report Header, Page Header, Detail, Page Footer, and Report Footer. The titles for the sections display in the shaded boxes. Then, you should experiment with this area by controlling the viewing area and resizing its sections. Each of these are explained below:



To control the viewing area:

Click on the +/- signs in front of the section titles to expand or collapse the section.

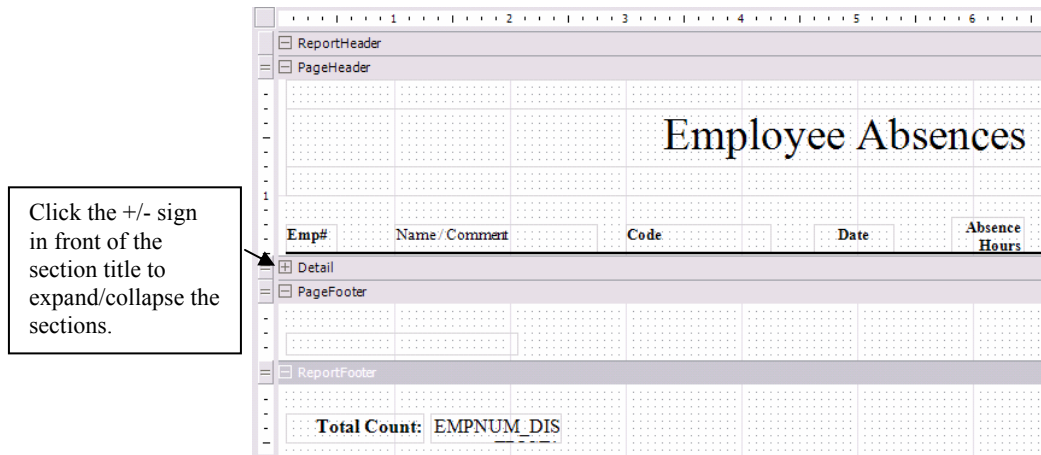


Figure 14-11. Report layout area

To resize a section:

Click on the box on the side ruler, and drag it up or down (Figure 14-12). A line appears on the report to help you see how the resized area will look.

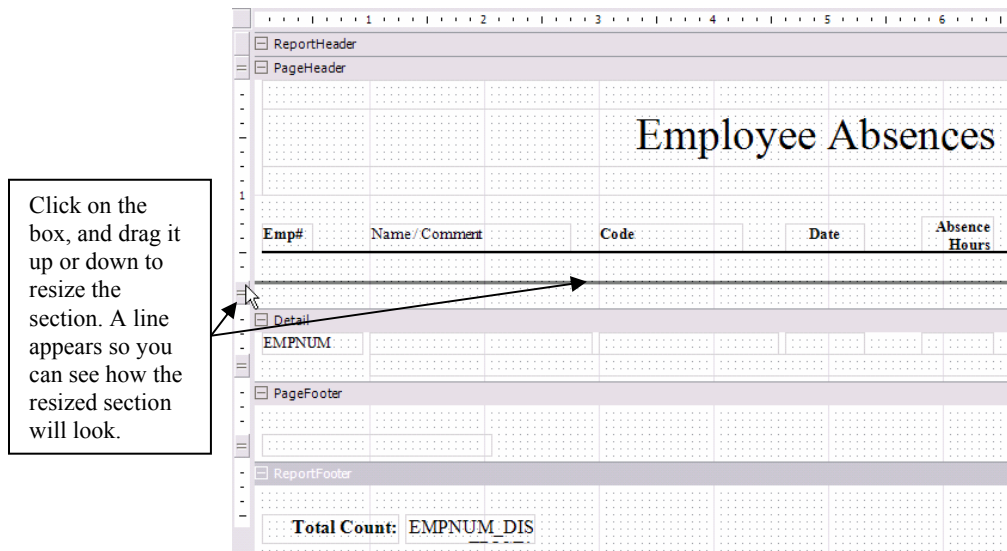


Figure 14-12. Resizing a section



Fields

The Fields box displays the fields you can add to the report. The available fields vary from one report to the next. For example, the first Fields box in Figure 14-13 shows the fields that are available when you are working in a custom report based on an absence report. The second Fields box shows the fields that are available when you are working a custom report based on the damage code report. Each report has a wide selection of data fields you can elect to place on your report layout.

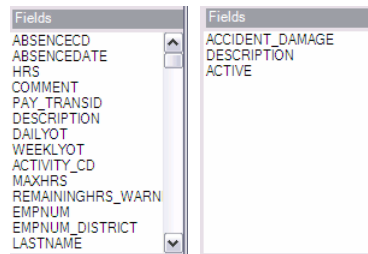


Figure 14-13. Available report fields

To add a field to the report, click on its name and drag it into the report area. As you click and drag, you will see a cursor like the one pictured in Figure 14-14.

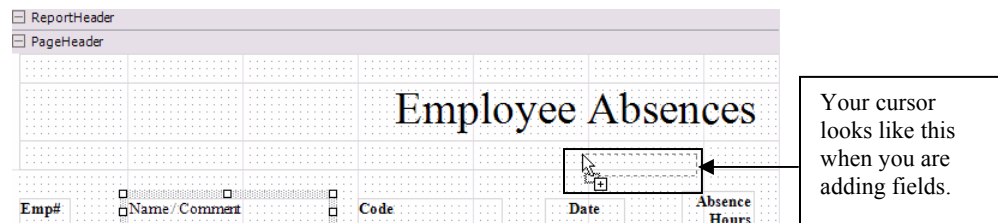


Figure 14-14. Adding fields to reports

Report Contents

The Report Contents box lists each element contained in the different report sections and displays the properties that have been set for that element.

1. You can click on an item, and the corresponding element is highlighted in the report display area (Figure 14-15).
2. When you click on an item in this box, you can view the properties that have been set for that element. (Figure 14-15).

NOTE: You might need to click the +/- sign in front of the section title to expand/collapse the list. Also, you might have to use the scroll bars to view the selected element.

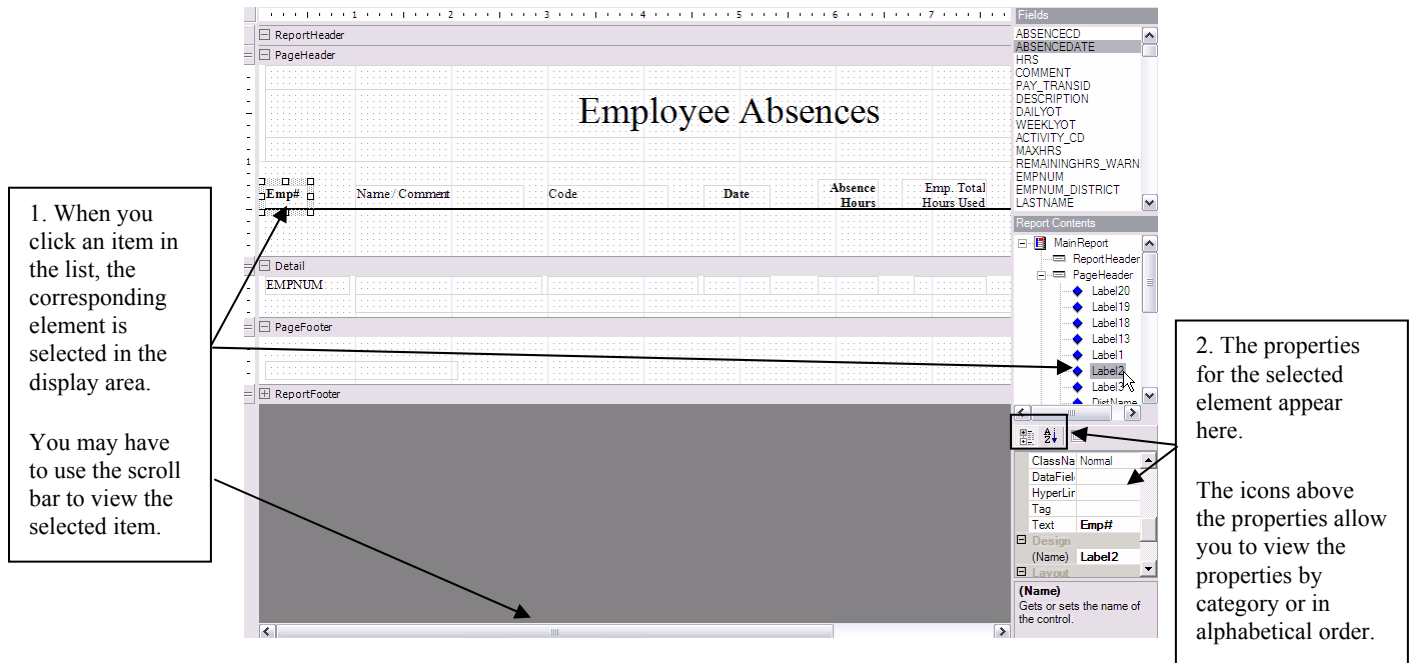


Figure 14-15. Report Contents

Properties

Figure 14-16 shows that the Absence Hours text field has been selected. The Properties section shows the properties, or properties, for that element.

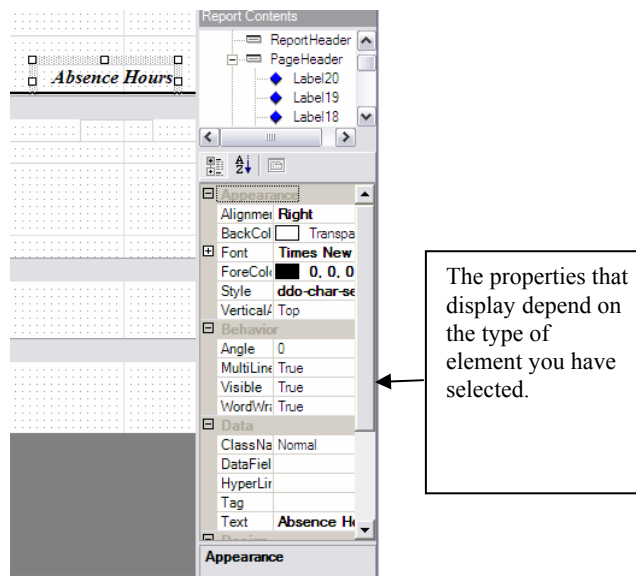


Figure 14-16. Properties

When you select a text element, you can set properties in these categories: Appearance, Behavior, Data, Design, Layout, and Misc. Each categories lists the settings you can apply to the selected element.



For example, in the Appearance section, you can set the element's alignment, background and foreground color, font properties, output format, and vertical alignment. In the Data section, you can change the element's text.

Resizing the Fields, Report Contents, and Properties Pane

You can resize the Fields, Report Contents, and Properties pane to make these areas wider as well as increase the height of each section.

To change the height of one of the sections of this pane:

1. Place your cursor over the bar at the top of the section you want to resize. Figure 14-17 shows how the cursor looks when you place your cursor over a border in this section of the screen:

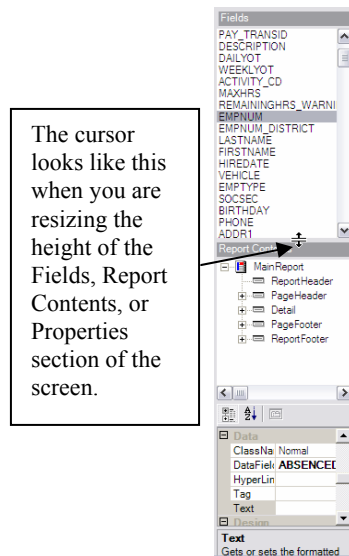


Figure 14-17. Increasing the height of a section in this pane

1. Click and drag the border up or down to change the height of one of the sections in this pane.

To resize the pane to make it wider:

1. Place your cursor over the edge of this pane. Figure 14-18 shows how the cursor looks when you place your cursor over the border of this section of the screen:

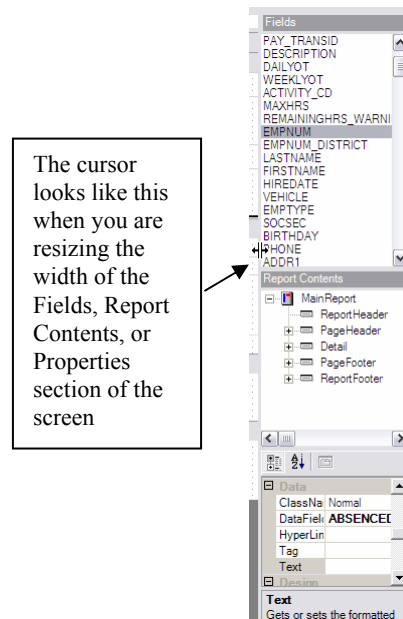


Figure 14-18. Increasing the width of this pane

2. Click and drag the border up or down to change the height of one of the sections in this pane.

Sample Custom Report

The procedures below explain the process of changing a report from beginning to end. It has been written to show you the types of changes you can make to any report layout file and has been divided into sections so that the entire process is easier to understand.

This example will show you how to copy the Absence 1 Line Report – By Code, Employee, and Date. Then, you will remove and then add an element. After that, you will learn how to resize and align elements. The last section explains some advanced customization techniques.

This section consists of the following:

- Creating a New Report by Copying an Existing Report
- Changing an Element's Font
- Changing an Element's Color
- Removing Elements
- Adding Elements
- Adding a Field to the Report
- Resizing an Element
- Aligning Elements
- Saving Report Layout Files
- Other Customization



Creating a New Report by Copying an Existing Report

As has been discussed previously, T.O.M. only allows you to create a new report by copying an existing report. To do this you must first launch the T.O.M. Report Maintenance option.

1. Select File>Other>Reports (Figure 14-19).

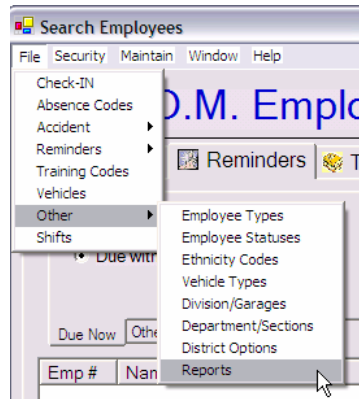


Figure 14-19. Selecting File>Other>Reports

The Report screen appears.

2. After launching the T.O.M. Report Management Feature, search for the report you want to use as a template for the new report. See the Searching for Reports section previously in this chapter for information about searching for reports.
3. Once that report is located in the search results list, select the report and then click on the New / Copy button. Figure 14-20 shows selecting the Absence 1 Line Report–By Code, Employee, and Date).

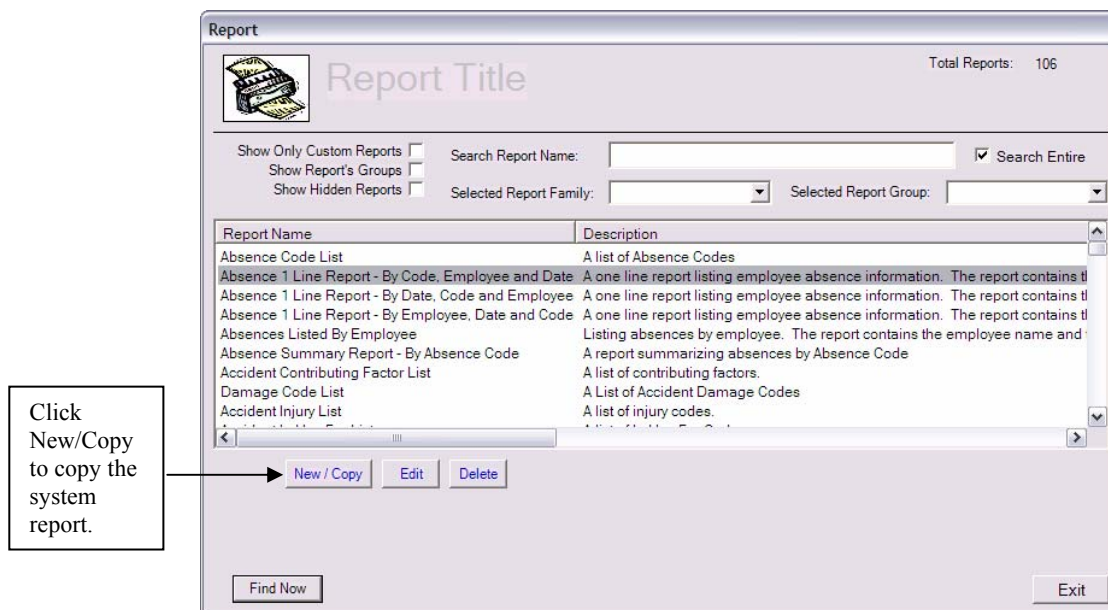


Figure 14-20. Selecting a report to copy



- Click the New/Copy button. The Copy a Report to Customize screen appears.
- Type the new name of the report you are creating. Figure 14-21 shows that Custom Absence 1 Line Report has been typed in as the report name.

Type the report name, and click Copy/Create Report.

Copy A Report to Customize

Copy a Report to Customize

You are about to create a new report by copying an existing report. Please provide a new report name:

Report to Copy: Absence 1 Line Report - By Code, Employee a

Name of New Report: Custom Absence 1 Line Report

Copy / Create Report

Cancel

Figure 14-21. Naming a custom report

- Click the Copy/Create Report button.

The Report Description screen appears (Figure 14-22):

7. Click the layout file you want to edit.

8. Click the Modify Layout File button.

Report Details

Report

* Custom Report *

Report Name: Custom Absence 1 Line Report

Description: A one line report listing employee absence information. The report contains the employee, the date and type of absence, hours of absence and a comment. The report is sorted by code, employee name, and date.

☒ Show

Original Report: ABSENCE_LIST_1LINE_BY_CDEMPDT

Report Alias: ABSDET_BY_CDEMPDT

Report Layout(s): (to modify the report design click on the layout that you wish to modify in the list below and then click on the Modify Layout File Button)

Description	Layout
Main Report Layout	f41d879e-d356-44ae-ae65-0feabc51a90...

Modify Layout File

OK

Exit

Figure 14-22. Report Description screen

- Select the layout file you wish to modify. In most cases, this is just the Main Report Layout file, but in some cases, a report will have multiple layouts that you can choose from.
- Click the Modify Layout File button.



Your screen should look like Figure 14-23:

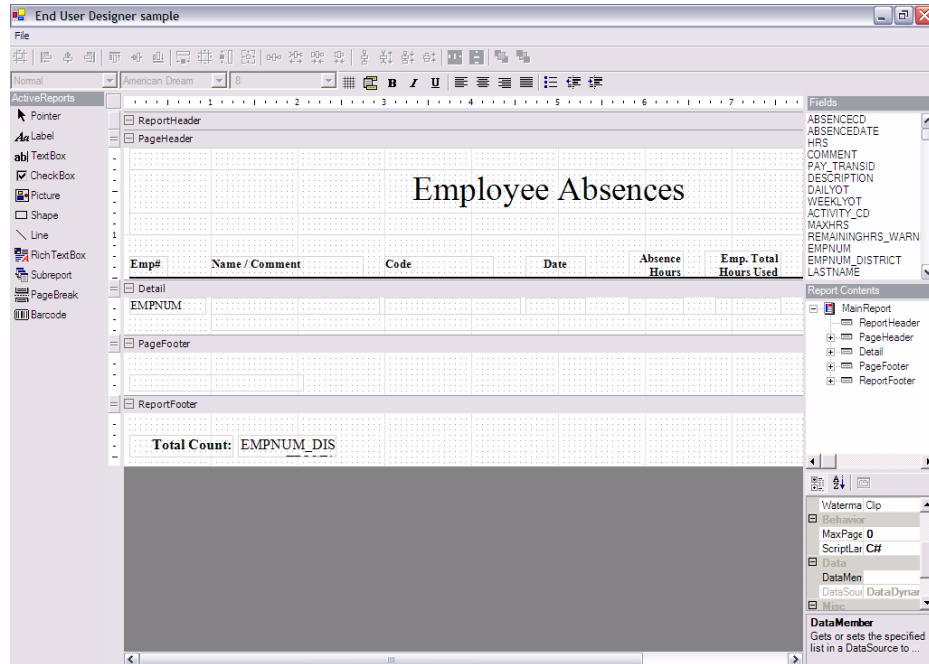


Figure 14-23. Report customization screen

Changing an Element's Font

Changing an element's font and color is similar to the process you have probably used to modify text in common word processing programs.

1. Select the element(s) whose font you want to change. Figure 14-24 shows that more than one element has been selected. To select more than one element, hold down your Ctrl key while you click on them.

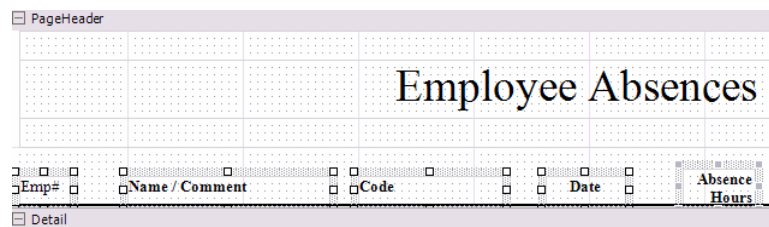


Figure 14-24. Selecting elements

2. Select the font you want to change the elements to (Figure 14-25).

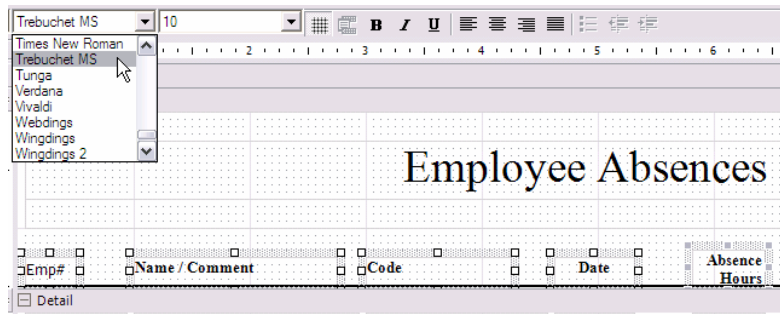


Figure 14-25. Selecting a font

The selected elements are updated to use the selected font (Figure 14-26):

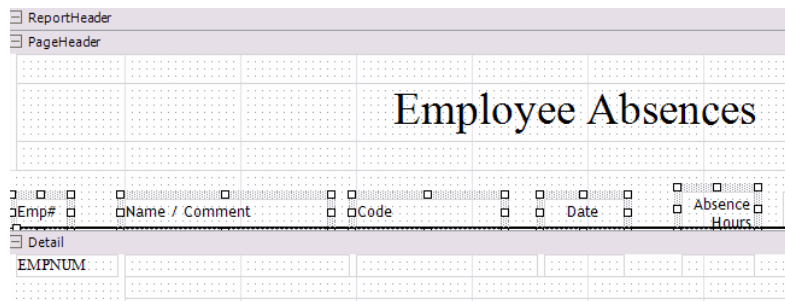


Figure 14-26. After changing the font

Changing an Element's Color

You can change an element's foreground and background color. The background color is the color that fills the entire element while the foreground color is the color of the element's text. When changing the foreground and background colors, make sure that there is enough contrast between the foreground and background colors so that the text is easy to read. For example, if you make the background a dark color but leave the foreground text as black, it may be hard to read the text in the printed report. The same holds true for the background color. If you leave it white and change the foreground color to a light color, there may not be enough contrast to read the text clearly in the printed report.

1. Select the element(s) whose font you want to change. Figure 14-27 shows that more than one element has been selected. To select more than one element, hold down your Ctrl key while you click on them.

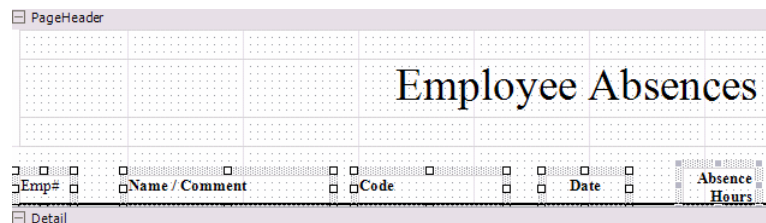
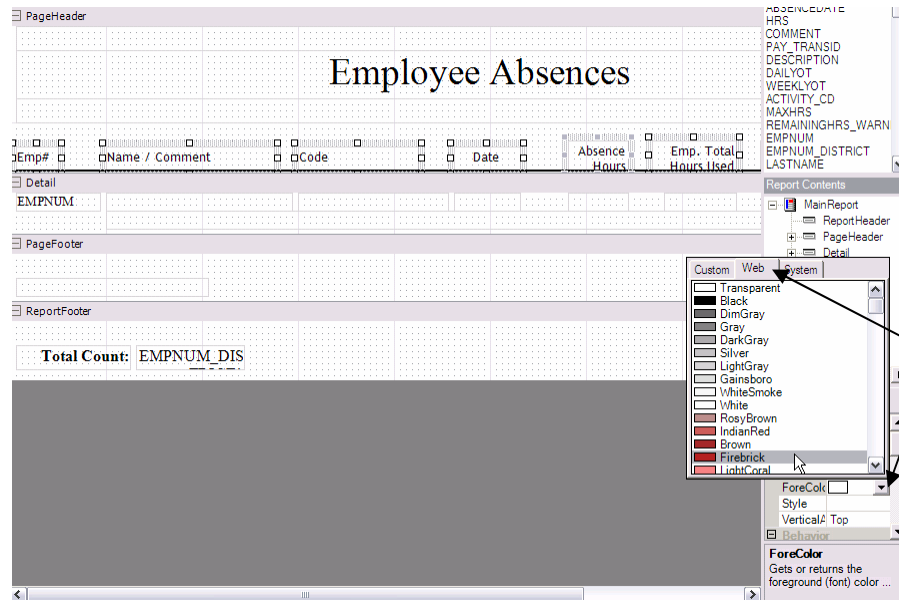


Figure 14-27. Selecting elements

2. Find the Appearance section in the report properties section of the screen.



3. Click the Foreground Color pull-down arrow.
4. Select the palette containing the color you want to apply to the selected element(s).
5. Select the color you want to apply to the selected element(s).



Find the Appearance section. Click the Foreground Color pull-down arrow. Then, select the palette having the color you want to apply to the text. In this example, Firebrick in the Web palette has been selected.

Figure 14-28. Changing the foreground color

Figure 14-29 shows how the elements look after their color has been changed:

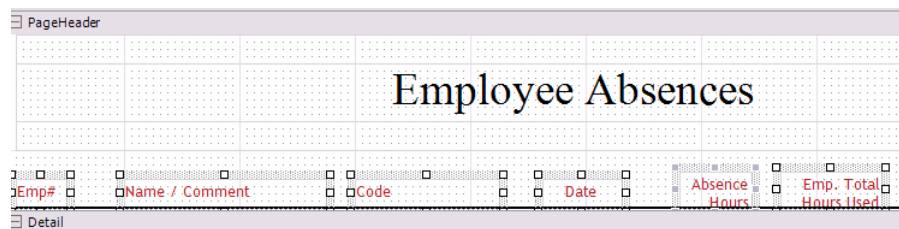


Figure 14-29. After changing the foreground color

Removing Elements

You can easily remove elements that you do not want to appear in your final report. Keep in mind that if you delete a label (such as Emp. Total Hours Used), you probably also want to remove its associated data field.

NOTES:

- **There are three elements in any report that CANNOT be removed or your report will NOT run correctly. They are:**
 - » **The User Comment**
 - » **The Report Date and Time**
 - » **The Page Number**



- **The reports have programming script referencing these elements, so if you delete these elements from the report, an error will occur when you try to print the reports. If you do not wish to have one of these elements display on the report, you can change its Visible property to False.**

1. Select the element(s) you want to remove. This example shows that a label and its associated element have been selected. To select more than one element, hold down your Ctrl key while you select the elements.

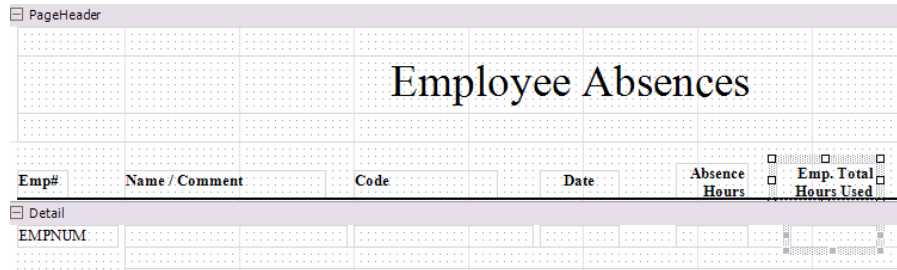


Figure 14-30. Selecting elements to remove

2. Press the Delete key on your keyboard. The elements are removed (Figure 14-31):

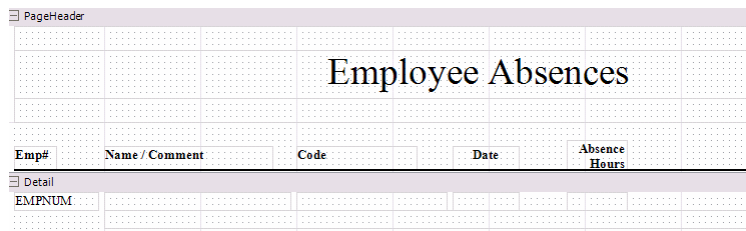


Figure 14-31. Report after deleting elements

Adding Elements

You can add elements using the options in the toolbox, or you can click and drag fields into the report from the Fields box. The procedure below shows you how to add a text element to the report.

1. Select the TextBox icon in the toolbox.

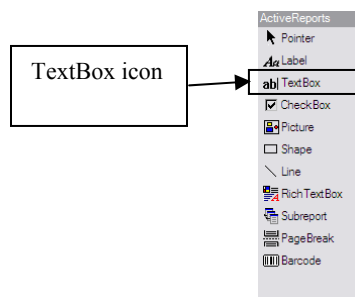


Figure 14-32. Selecting the Text Box icon

2. Click and drag a box the size you want the text element to be (Figure 14-33).



Emp#	Name / Comment	Code	Date	Absence Hours	Tot Hrs Used
Employee Absences					

Figure 14-33. Adding a text box to the report

Figure 14-34 shows how the report looks after you add the text box. Notice that the properties box has been updated so that you can apply settings to the new element.

The screenshot shows the report designer interface. The report layout includes sections for ReportHeader, PageHeader, Detail, PageFooter, and ReportFooter. A new text box, labeled 'TextBox3', has been added to the report. The Properties box on the right is open, showing the 'Text' field selected. A callout box points to the 'Text' field in the Properties box, stating: 'Properties box allows you to apply settings to the new element' and 'Click in the Text field to change the field's text.'

Figure 14-34. Viewing the added text box

- Click in the Text field in the Properties box.
- Type the text you want the element to display in the report. Figure 14-35 shows that the text has been changed to Year End Report.

The Properties box is shown with the 'Text' field selected. The 'Text' field is set to 'Year End'. The 'Text' field is highlighted in blue.

Figure 14-35. Changing the text in a text element



Figure 14-36 shows how the report looks after you change the text:

The screenshot shows a report titled "Employee Absences" in a large, bold, serif font. Below the title, there is a section labeled "Year End Report" with a small square icon to its left. The report is organized into a table with the following columns: "Emp#", "Name / Comment", "Code", "Date", "Absence Hours", and "Tot Hrs Used". The table is currently empty. On the left side of the report, there is a "Detail" section with a "EMPNUM" field.

Figure 14-36. Report after changing the text in the text box

NOTE: You could continue to customize the text by changing its alignment or font.

Adding a Field to the Report

You can add a new field to the report, but you should keep the following in mind when doing this:

- You can add fields to the report by selecting them and dragging them into the report. Be sure that you place the field into the Detail section of the report. For example, if you select the Phone field and add it to the Page Header or Page Footer area of the report, the phone number will print on every page. You should only place fields into Page Header or Page Footer if you want to want the field to print on every page; otherwise, drag fields into the Detail section of the report.
- When you add a field to the report, only the field is added, meaning that the it will not automatically have a label, or text box, in the Page Header section. To learn about adding a text box to the report, see the Adding Elements section previously in this chapter.
- The assumed font of the new field will usually be Arial. Because most of the T.O.M. reports use Times New Roman as the default font, you probably will need to change the field's font so that it matches the other fonts used in the report. See the Changing an Element's Font section previously in this chapter for information about changing a field's font.

To add a field to the report:

1. Select the field you want to add to the report. Figure 14-37 shows that the Phone field has been selected.
2. Drag the field into the area of the report where you want it to appear. . Figure 14-37 shows that the Phone field is being dragged into the Detail section of the report.

The screenshot shows the same "Employee Absences" report as in Figure 14-36. On the right side, there is a "Fields" list with the following items: MAXHRS, REMAININGHRS_WARN, EMPNUM, EMPNUM_DISTRICT, LASTNAME, FIRSTNAME, HIREDATE, VEHICLE, EMPLOYEE, SOCSEC, BIRTHDAY, PHONE, ADDR1, and ADDR2. The "PHONE" field is highlighted. Below the "Fields" list is a "Report Contents" pane showing a tree view of the report structure: MainReport, ReportHeader, PageHeader, Detail, PageFooter, and ReportFooter. A mouse cursor is shown dragging the "PHONE" field from the "Fields" list into the "Detail" section of the report.

Figure 14-37. Dragging a field into the report



NOTE: Always drag fields into the Detail section unless you want the field's contents to print on every report page; if you do want the field to print on every page, drag it into the Page Header or Page Footer section of the report.

3. Position the report and change its properties, if necessary, by following the other procedures described in this section of the chapter.

Resizing an Element

You can easily resize an element by clicking on its borders and dragging them.

1. Select the element you want to resize. The element displays a border with handles.
2. Place your cursor over one of the handles. It turns into a two-headed arrow.
3. Drag the element's handle until it is the right size. Figure 14-38 shows that the element is going to be widened:

Name / Comment	Code	Date	Absence Hours	Emp. Total Hours Used	Emp. Max Hours
----------------	------	------	---------------	-----------------------	----------------

Figure 14-38. Resizing an element

The report layout file looks like this with the resized element (Figure 14-39):

Name / Comment	Code	Date	Absence Hours	Emp. Total Hours Used	Emp. Max Hours
----------------	------	------	---------------	-----------------------	----------------

Figure 14-39. After an element has been resized

Notice that the element is no longer aligned with the other fields. The next section shows you how to align the element with the other elements.

Aligning Elements

NOTES: You must select at least two items before you can use any of the alignment icons. Also, the selected elements align to the last selected element. You can tell which element was selected last because it displays with a different border.

1. Select the item that is not aligned correctly.
2. Hold down your Ctrl key, and select the item that is aligned correctly.

NOTE: You can select both elements by clicking and dragging around them.



Figure 14-40 shows that two items have been selected:

Employee Absences					
Name/Comment	Code	Date	Absence Hours	Emp. Total Hours Used	Emp. Max Hours

Figure 14-40. Selecting two items



- Click the  icon to align the elements along their tops.

Figure 14-41 shows how the elements look after they are aligned:

Employee Absences					
Name/Comment	Code	Date	Absence Hours	Emp. Total Hours Used	Emp. Max Hours

Figure 14-41. After aligning elements

You need to nudge the Date element over because it and Absence Hours now overlap.

- Click on the Date label element and use your arrows keys to move it to the left. Now that you have moved the Date label over, you need to move its corresponding data field over. The easiest way to do this is to align it with the Date field.
- Click in the white space so that nothing is selected. Select the Date data field in the Detail section of the report.
- Click the Date label element.
- Click the  to align the selected elements using their center points.

Date	
------	--

Figure 14-42. After aligning the Date label element and its data



Saving Report Layout Files

As you customize the report layout file, you should save it.

To save your report layout file, select File>Save Layout.

Other Customization

Adding a New Style

When you add a new style, you can specify that the new style is based on Normal or based on None.

- If you base a style on Normal, it “inherits” settings from Normal. For example, if Normal uses Arial as its font, all styles that inherit their font from Normal use Arial. Then, if you change Normal to Verdana, all styles that inherit their font from Normal will be changed to Verdana.
- Even if you base a style on Normal, you can change those properties that you do not want the style to inherit from Normal. For example, the style will initially inherit its font size from Normal, but you can change it to another font size. Once you change an attribute, it will no longer inherit that attribute from Normal, meaning that even if you change that attribute for Normal, it will not affect the changed style.
- If you do not base a style on Normal, you need to change it manually because it will not inherit any settings from Normal.

To create a style called Column Heading:

1. Select File>Page Setup (Figure 14-43).

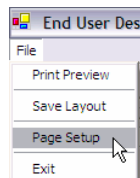


Figure 14-43. Selecting File>Page Setup

The Report Settings screen appears.

2. Click the Styles button (Figure 14-44).
3. Click the New button (Figure 14-44).

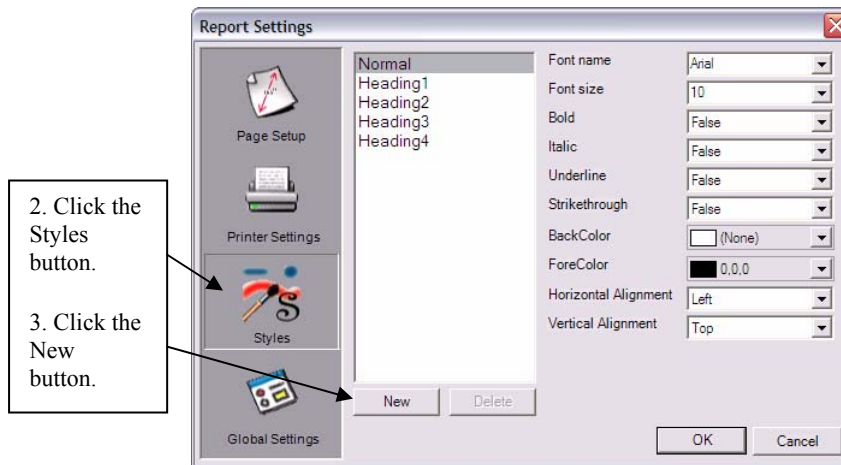


Figure 14-44. Report Settings screen

4. Name the style. Figure 14-45 shows adding a style called Column Heading.
5. Select Normal from the Base style pull-down arrow.

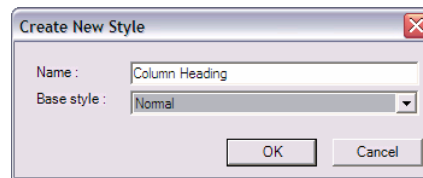


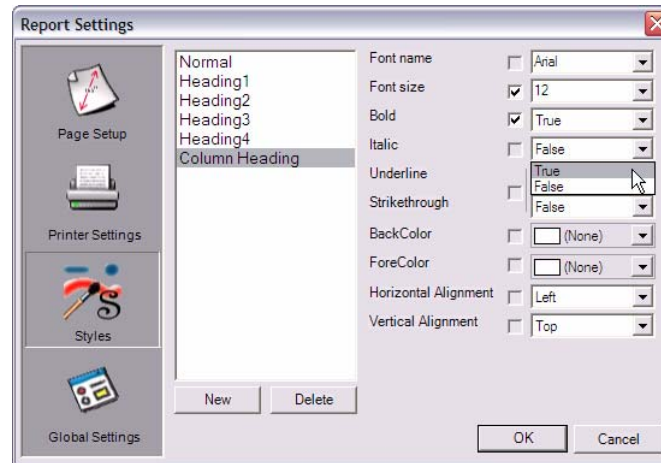
Figure 14-45. Adding a new style

6. Click the OK button to add the style.

NOTE: Because the style inherits settings from Normal, the properties will appear to be unavailable.

7. Change the properties.

Figure 14-46 shows that the font size has been changed, bold has been set to True, and Italic is being set to True. Notice that after you change an attribute from its inherited value to something else that a check mark appears next to that attribute.



Click the pull-down arrows to change the attributes. You can also type a value into Font size.

Figure 14-46. Changing a style's properties

NOTE: When you set an attribute to True, you are applying that attribute.

8. Click OK to save the style.

Changing the Style Applied to an Element

1. Select the element you want to apply the different style to.

Figure 14-47 shows that all the columns have been selected:

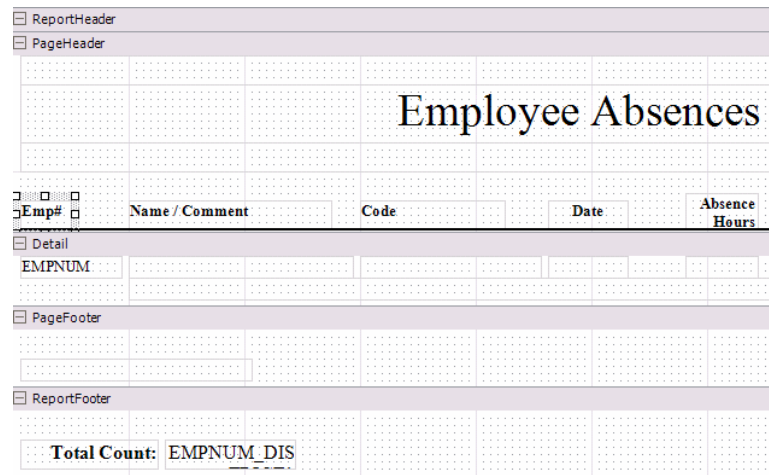


Figure 14-47. Selecting an element

2. Select the style you want to apply to the selected element.

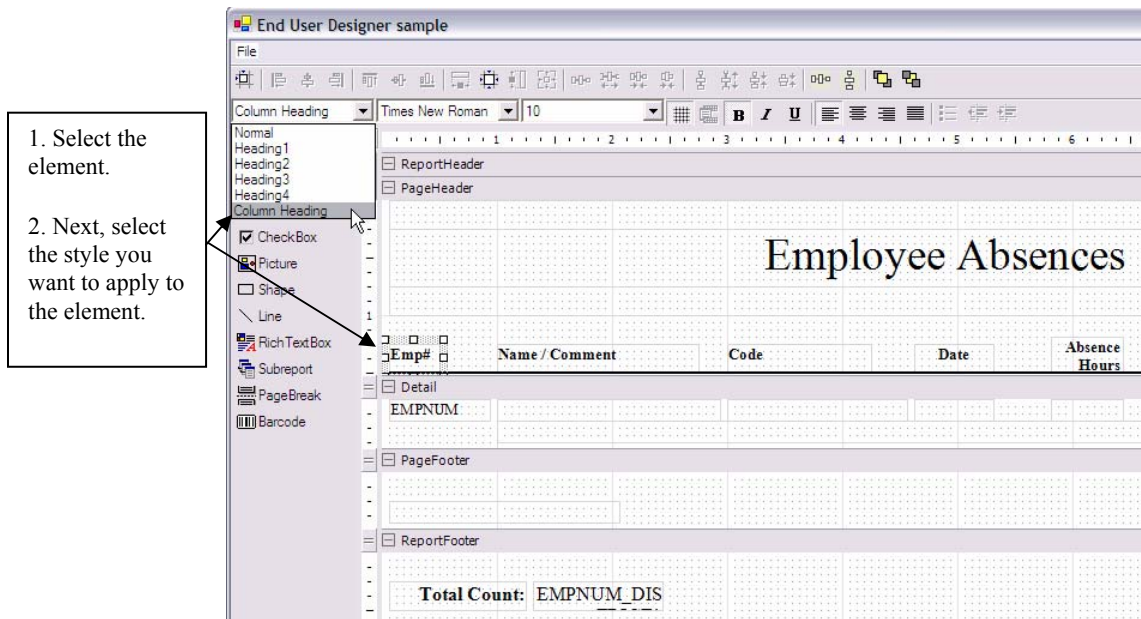


Figure 14-48. Applying a style to an element

Figure 14-49 shows that the style has been applied to the element:

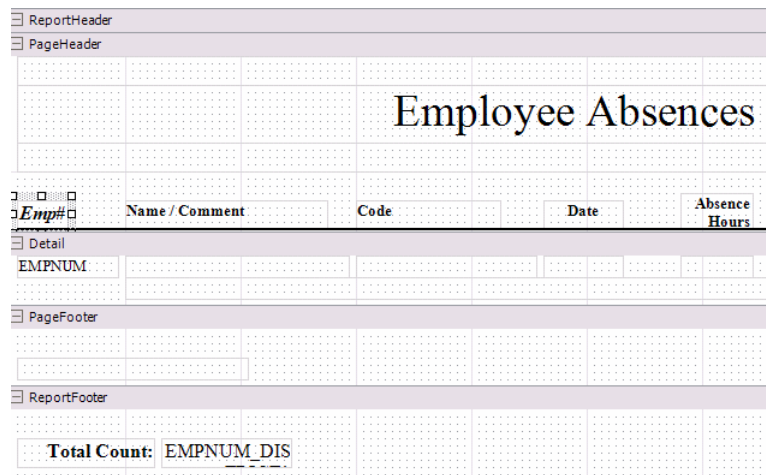


Figure 14-49. After applying a style to an element

3. Repeat this process until you have changed all the elements to the style you want them to have.

Figure 14-50 shows that all the column headings have been changed to use the Column Heading style. Notice, though, that now some of the elements need to be resized so that all the column heading text displays. The next exercise shows you how to resize the elements.



Employee Absences											
Name/Comment	Code	Date	Absence Hours	Emp. Total Hours Used	Emp. Max Hours						
											Page:
Count: EMPNUM_DIS											

Figure 14-50. After changing all column headings

Changing an Element's Text and Word Wrap

1. Select the element whose text you want to change.

Figure 14-51 shows that the Emp Total Hours Used element has been selected:

Employee Absences											
Name/Comment	Code	Date	Absence Hours	Emp. Total Hours Used	Emp. Max Hours						

Figure 14-51. Selecting the label you want to edit

2. Look in the Report Contents section of the screen.
3. Locate the Text field.

NOTE: You may need to expand the Data section to view this field.

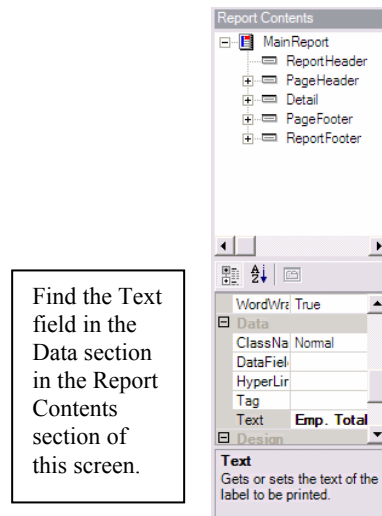


Figure 14-52. Looking at Report Contents

- Click in the text field, and type the text you want to appear in the report.
- Press your Enter key. The element's text changes as shown in Figure 14-53:

Employee Absences						
Name /Comment	Code	Date	Absence Hours	Tot Hrs	Emp. Max	

Figure 14-53. Viewing changed text

Notice that the text now wraps.

- Find the Word Wrap attribute.

NOTES:

- This changes the element's word wrap feature so that the text in this field cannot wrap.***
- Figure 14-54 shows that the attribute is found in the Behavior section of this screen; you can also view the properties in alphabetical order by clicking the **Alphabetic** icon.
- You can also manually resize the attribute as described in the Resizing an Element section earlier in this chapter.***

- Change the attribute to False.

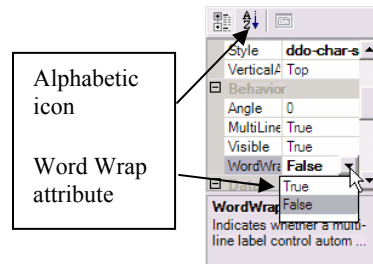


Figure 14-54. Changing an element's word wrap attribute

Figure 14-55 shows how the element looks after changing the Word Wrap attribute:

Figure 14-55. After changing the Word Wrap attribute

NOTE: You can then move the element by aligning it as described in the Figure 14-55 section or by using the arrow keys on your keyboard. The next section assumes you have done this step.

Hiding Reports

The Employee Management system ships with more than 100 system reports. It is unlikely that you will use all of those reports, so you can hide those that you know your organization will not use. This simplifies the dialog so that you and others who are using the Employee Management system see only those reports that you actually use.

NOTE: You can show reports after you hide them by clicking in the *Show* checkbox.

1. Select the report you want to show (Figure 14-56).

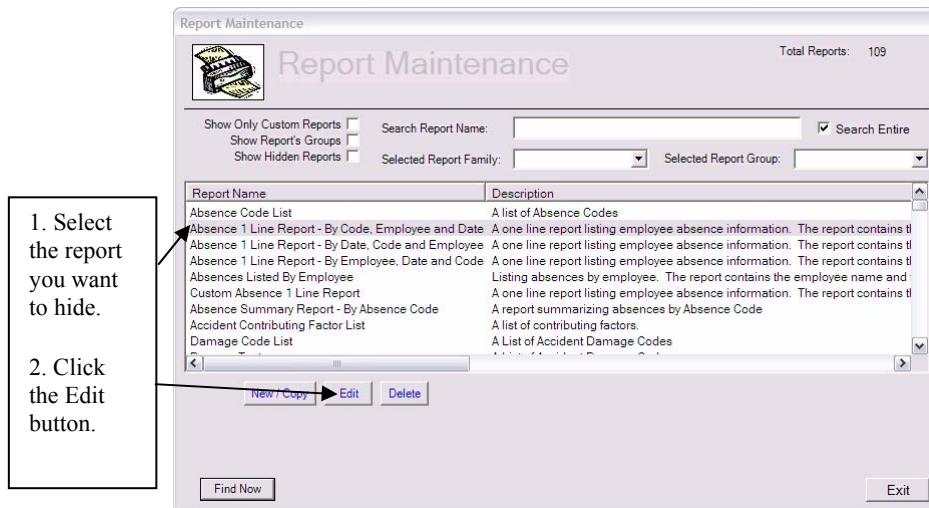


Figure 14-56. Selecting the report you want to hide

2. Click the Edit button. The Report Details screen appears.
3. Click in the Show checkbox to remove the check mark.

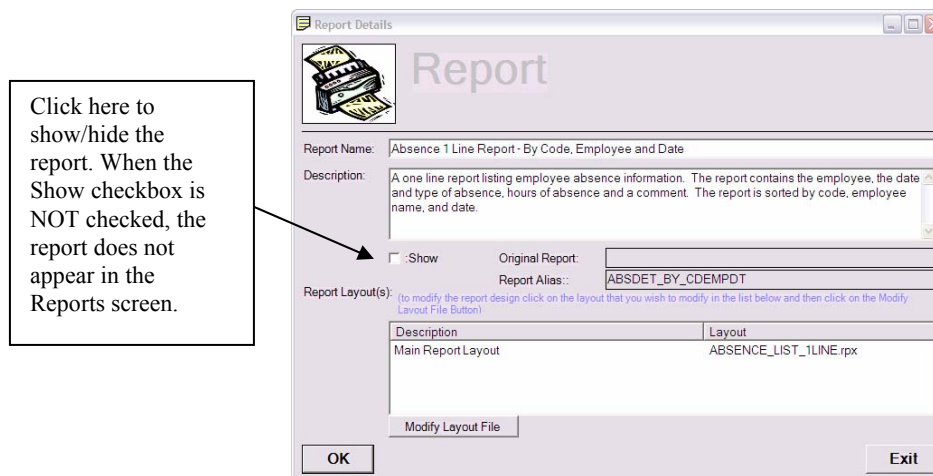


Figure 14-57. Turning off Show

4. Click OK to save your changes.



Figure 14-58 and Figure 14-59 show how the Report Maintenance Report screen looks before and after you hide a report.

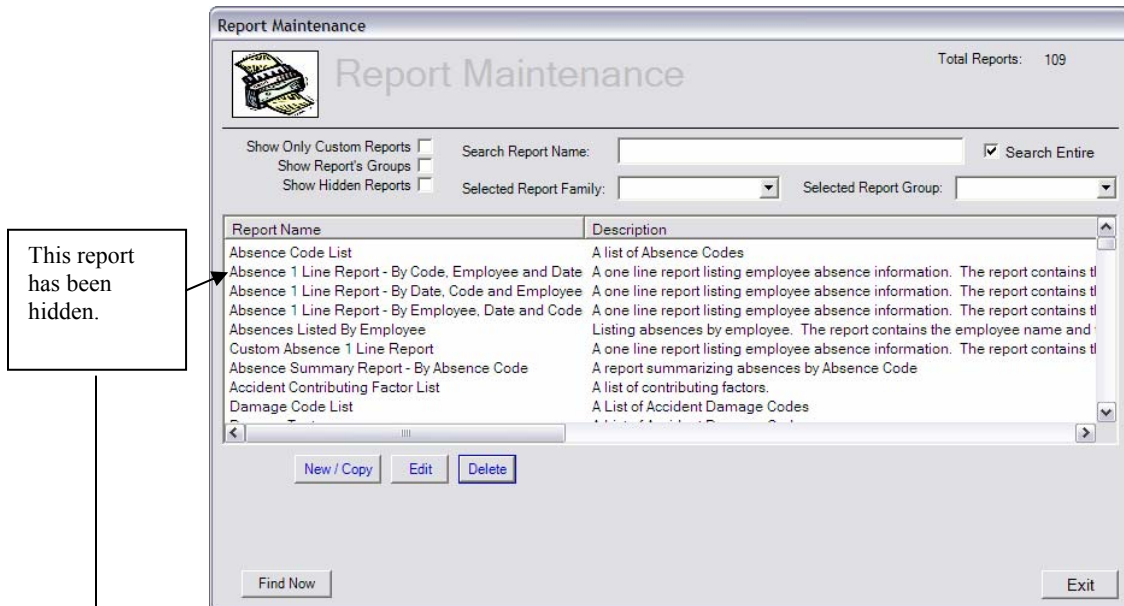


Figure 14-58. Before you hide a report

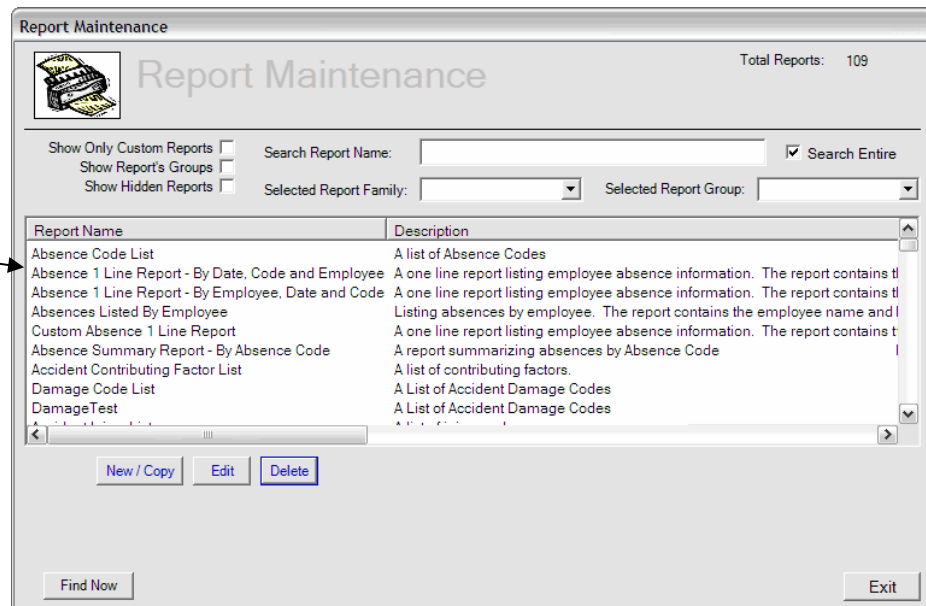


Figure 14-59. After you hide a report