Install a report

Note This section is intended for a System Administrator, as it may require associated **Rights**.

To add a new report, first save the file to the Reports Directory Store. See Find the report directory. You need to have the rights to add to this folder and edit the files. The max name length is 50 characters.
If the report to be installed is located elsewhere, and you have followed the procedure to install it, you will be prompted to save this by default to the reports directory store, if you decline this, then you will only be able to run this report from this local machine.

- Open the relevant selector form where the report is to be run from. This example uses the 'Person List (Basic)' report in the **Person** selector screen.
- On the left pane click and select **Reports**, a list of currently installed reports will show, the description is taken by default from the file name, but is editable to reflect the type of report.
- Dependant on the rights assigned, you should have a set of tab buttons, **Open**, **New**, **Edit** and **Delete**. If these are **not** available to you, contact your system administrator.
- Click on the **New** tab, a box appears, click **Browse** and point this to the Reports Directory Store for the file. Check the file type - the default is .rtm for a ReportBuilder report, .xml is for a job that will perform an action
- When you have found your report file, highlight and click on **Open**. The name appears under **Description** in the browse box, edit this if required.
- If no Sort Order is set the reports are listed alphabetically. If only one report has a sort order it is UNDER all the records where it is blank.
- Set the Access level to limit who will be able to **View**, **Print** or **Export** a report. See Reporting Access Levels
- If this report is only to be run from a specific **Branch**, select it from the drop down list, else leave blank for all Branches.
- If this report is only to be run for a range of **Divisions**, use the Change Division Filters to , else leave blank for all Branches.
- Permission to save the report PDF to Docs - tick to allow
- Contains Form Fields - the report can be set up so that on a PDF the field is editable. To then enable this for users this field must be ticked.
- There are 2 tick boxes marked **Preserve Report Order** and **Preserve Report Selection**. These may be applied under certain conditions, e.g. the people are sorted by the **Keyname** in the selector screen, but suppose our report sorted by **PersonID** and you wanted it to reflect this, tick the **Preserve Report Order** box, when now run the report will be sorted by the PersonID. It is possible that an error message will be displayed if a report cannot adhere to the ordering, in this case the box must be ticked in order to run. In the case of **Preserve Report Selection**, you may not want to report on the records selected but on the criteria set within the report. In this case this box would be ticked in order to overide the selector screen choice.
- When you are happy with the settings click OK, the name appears on the reports list and is now ready to run.

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