Install a report

refers to:
person selector → reports tab
desktop form → reports tab
vacancies form → reports tab
temp desk form → reports tab
progress form → reports tab
placements form → reports tab
contact events form → reports tab

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, unless it has already been saved there previously.

- 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 for the necessary rights.
- Click on the **New** tab, a box appears, click **Browse** and point this to the Reports Directory Store for the file. The filename should appear like the following.....\Testing\IQX\Reports\Person List (Basic).rtm
- 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 this report is only to be run from a specific **Branch**, selct it from the drop down list, else leave blank for all Branches.
- Set the Access level to limit who will be able to **View**, **Print** or **Export** a report. See note below on Access levels
- 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 dislpayed 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.

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 on a local machine.

See also
8.1 Find the report Directory.

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Access Levels
User levels are set within the **Maintenance → Users** menu. if the **Report**'s levels are **98 Export**, **99 Print** and **100 View**, and the **User**'s Access level is **98**, the User can View, Print and Export the report. However, if the User's Access level is raised to **100**, then the User is only able to View the report on screen - the Print and Export option will not be available. Raising the Report's Access level above the User's limit will hide the report from the User's view. This might be a very useful option for sensitive or Management reports. If this is a general report, then leave this setting as (0).

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