Edit 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

Occasionaly a report requires editing, this section deals with simple tweaking.
You can print out, or view a list of currently installed reports, by clicking on the IQX desk, click on the Select tab, scroll down to Miscellaneous reports, click and highlight 'Installed reports', click Open. This gives a list of reports for each slector screen, and also shows if a Report Selection box has been applied or not.

- To edit a report, open the selector screen, click on the reports tab, scroll to the required report, highlight and click the Edit tab, a browse box appears and gives you the opportunity to select the 2 tick boxes.

- If we wanted the report to overide the records selected previously, then we would tick the Preserve Report Selection box. This will ignore the selection we already made, possibly by date range in the case of our Placement report 'Bank Details', and execute the SQL statement within the report, you may be prompted to input some parameters, and the output will reflect the settings in the report.

- If we wanted the report to adhere to the ordering set within the report, we would tick the Preserve Report Order box. Although the records we want are selected in the screen, they may be ordered differently,in the case of our Placement report 'Bank Details', by Company, we get an error message when we try to run the report, to overcome this we tick the box, and it orders according to the report settings.



WARNING - Do not attempt to make changes if you are unsure of the consequences. - Contact IQX Support !

From time to time a report might need to be altered, i.e. the ordering requires changing, or the grouping is wrong.
In this instance a degree of SQL language and some knowledge of the tables within IQX might be beneficial in order to make the required changes.

- Firstly highlight the report you wish to change, click on the Edit tab and when the browse box appears click on the Design tab. This will bring up the Report Builder program, which has the

following tabs, Parameters, SQL, Calc, Design and Preview.

- If you click on the SQL tab, dependant on the complexity of the report, there may be one main data section, or many. The main one is normally the first in the list, and if you scroll down to the foot of the page you should see a command that reads, 'Group By' or 'Order By', in our example 'Bank Details', we have an 'Order By' 'Person.Keyname'. We wish to 'Order By' the person's name.

- Edit this by placing the insertion cursor at the end of the line and delete the part that say's 'Keyname', then retype the correct field which is 'Name'.
  Ensure you have the (.) between the Person and Name so that is reads like 'Person.Name'.

- Save the changes by clicking on the Apply tab, click on File, and Save. Now our report has been changed to reflect the person's name. When we now run the report with the Preserve Report Order box ticked, it will sort by our new ordering of person name.

Back to Online Users Guide
Back to Reports

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