Custom Report Integration

Custom report integration functions

The 25Live Administration Utility can be used to integrate custom reports created by your institution into 25Live. It allows authorized 25Live users to perform the following custom report integration functions:

- Define custom reports and add them to 25Live
- Copy existing standard and custom report definitions as the basis for creating new custom report definitions
- Edit custom report definitions
- Delete custom reports from 25Live

The 25Live Administration Utility is also used to:

- Set up and manage 25Live data. For information, see the *25Live Data Administration Guide* available by clicking Help and choosing "Data Administration."
- Set up and manage 25Live security. For information, see the *25Live Security Administration Guide* available by clicking Help and choosing "Security Administration."
- Set up and manage 25Live event pricing. For information see the *25Live Event Pricing Guide* available by clicking Help and choosing "Event Pricing."
- Access and run the Schedule25 Optimizer. For information, see the *Schedule25 Optimizer User Guide* available by clicking Help and choosing "Schedule25 Optimizer User Guide."

Adding and managing custom reports in 25Live

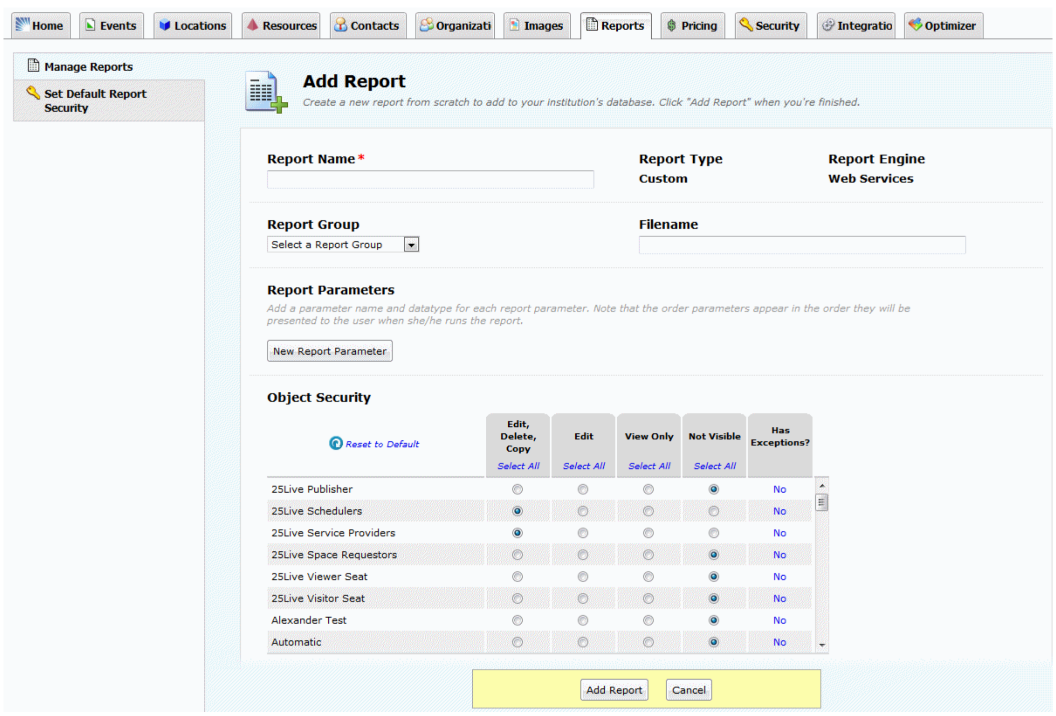
Manage Reports task tab

The ***Manage Reports*** task tab of the 25Live Administration Utility allows authorized users to:

- Define new custom reports and add them to 25Live
- Edit the definitions of custom reports that have previously been added to 25Live
- Delete custom reports from 25Live

Add Report page

The Add Report page lets you define new custom reports and add them to 25Live.



Report engine

When adding a report, you need to select a report engine. The choices are WebServices or Interactive Reports.

WebServices

WebServices is a method for drawing data out of your Series25 database and converting it to Extensible Markup Language (XML) format. 25Live is built on WebServices which provides an intermediate step between the Series25 database and the 25Live application.

Because XML is a standardized format that is recognizable by many applications and protocols, it is possible for Series25 data to be transformed into many different contexts. For example, it can be converted to .pdf or spreadsheet form, read as a table in a web browser, or imported into third-party applications for digital signage and other uses.

For information on creating Custom Reports using Series25 WebServices, view this video tutorial available from Series25 Customer Resources: http://knowledge25.collegenet.com/display/WSW/Series25+WebServices+Video+Tutorial

Interactive reports

Interactive Reports produces reports in multiple formats, including .pdf, .xls, .doc, .rtf and HTML. It can also email reports. Its designer tool is a desktop application that provides a drag and drop GUI interface for developing custom report templates. It lets users design, develop, and test custom reports prior to deploying them in the 25Live production environment.

The designer creates report templates. At runtime, these templates are populated with data retrieved using the WebServices API. Templates are connected to WebServices through Data Sources which represent connections to individual WebServices. Data Sources are defined and managed within a designer component known as the Catalog.

For information on creating Custom Reports using Series25 Interactive Reports, read the following article available from Series25 Customer Resources: http://knowledge25.collegenet.com/download/attachments/34930709/Creating_25Live_Custom_Reports.pdf

Report parameters

If you want 25Live users to specify relevant values for report generation to filter records or create a subset of data, you need to define the parameters of your custom report on the Add Report page. For example, you may want the user to supply a date range, an object, or a search as a parameter.

If you specify a search parameter, only the objects selected in the search are processed in generating the report.

If you specify an object parameter (organization, contact, requirement type, or organization type), 25Live performs error checking on the value entered for the parameter in generating the report to ensure that an existing internal identifier matches the user's entry.

To help ensure predictable report results, it is recommended that you require a value for each of your report parameters. If you don't, the generated report may not include all the expected data or, in some cases, any data.

You must choose the data type of each parameter you define.

If you choose...	*The user generating the report must...*
String	Enter alphanumeric text (maximum 80 characters)
Integer	Enter a whole number

If you choose...	*The user generating the report must...*
Float	Enter a number that may include a decimal
Date	Enter a date
Time	Enter a time
Date/Time	Enter a date and time
Duration	Enter a time duration (days/hours/minutes)
Boolean	Select Yes or No
Event Search	Select the name of an existing event search
Organization Search	Select the name of an existing organization search
Location Search	Select the name of an existing location search
Resource Search	Select the name of an existing resource search
Object	Select an organization, contact, requirement type, or organization type

Defining and adding a custom report

1. Click the Reports tab, then click the Manage Reports task tab.
2. Click ADD to go to the Add Report page.
3. Enter the name of the report as you want users to see it in 25Live.
4. Choose the Report Engine from the drop-down list (see Report engine for more information).
5. Choose the appropriate Report Group for the report from the drop-down list.
6. In the Filename field, enter the name of the .xsl (WebServices) or .cis (Interactive Reports) file you created for the report and placed in the ASV custom reports directory.
7. Define report parameters as needed. Enter the parameters in the order you want them presented to users generating the report. To define a parameter:
   - Click New Report Parameter.
   - Enter the parameter name as you want it to appear to 25Live users when they are specifying parameters for the report.
   - Choose the parameter's data type from the drop-down list.
   - From the Field Mapping drop-down list, choose the field in the RPT_PARM_VALUE record where the user-supplied value for the parameter should be stored.
   - If you chose "Object" as the parameter's data type in step **c**, choose the object type from the Validation drop-down list.
   - If the user must enter a value for the parameter, select "Yes" for Value Required.
   - Repeat these steps to define additional parameters.

8. Select the object security of the report for each 25Live security group. For more information, see the "Reports Security Administration" section of the *25Live Security Administration* document, accessible from the 25Live Administration Utility Help menu.
9. Click Add Report.

Copying a report definition and adding a custom report

Rather than starting from scratch to define a new custom report, you can use the Add Report via Copy page to copy the report definition of an existing standard or custom report as the basis for defining a new custom report, and then add the new report to 25Live.

1. Click the Reports tab, then click the Manage Reports task tab.
2. Click COPY.
3. Find the report you want to want to copy, highlight it, and click Copy.
4. On the Add Report via Copy page, enter the name of the new report as you want users to see it in 25Live.
5. Choose the appropriate Report Group for the report from the drop-down list.
6. In the Filename field, enter the name of the .xsl (WebServices) or .cis (Interactive Reports) file you created for the report and placed in the ASV custom reports directory.
7. Modify the report parameters as needed.

To...	***Do this...***
Add a new parameter	Follow step 7 of Defining and adding a custom report.
Modify a parameter	Change the parameter fields as needed. See Report parameters and step 7 of Defining and adding a custom report for guidance.
Remove a parameter	Click its Remove (red X) icon.
Change the presentation order of a parameter	Use the up and down arrows to move the parameter up or down in order.

8. Select the object security of the report for each 25Live security group. For more information, see the "Reports Security Administration" section of the *25Live Security Administration* document, accessible from the 25Live Administration Utility Help menu.
9. Click Add Report.

Editing a custom report definition

The Edit Reports page lets you edit the definitions of custom reports that have been previously added to 25Live. You can't edit the definitions of standard reports, although you can copy them as the basis for defining new custom reports.

1. Click the Reports tab, then click the Manage Reports task tab.
2. Click EDIT.

3. Find the custom report whose definition you want to want to edit, highlight it, and click Edit.
4. On the Edit Reports page, modify the report name, report engine, report group, and/or filename as needed.
5. Modify the report parameters as needed.

To...	***Do this...***
Add a new parameter	Follow step 7 of Defining and adding a custom report.
Modify a parameter	Change the parameter fields as needed. See Report parameters and step 7 of Defining and adding a custom report for guidance.
Remove a parameter	Click its Remove (red X) icon.
To...	***Do this...***
Change the presentation order of a parameter	Use the up and down arrows to move the parameter up or down in order.
Change the report engine	Use the drop-down list to change report engines. The choices are WebServices or Interactive Reports.

6. Modify the object security of the report for 25Live security groups as needed. For more information, see the "Reports Security Administration" section of the *25Live Security Administration* document, accessible from the 25Live Administration Utility Help menu.
7. Click Save Changes.

Deleting a custom report from 25Live

The Delete Report page lets you delete custom reports from 25Live.

1. Click the Reports tab, then click the Manage Reports task tab.
2. Click DELETE.
3. Find the custom report you want to want to delete, highlight it, and click Delete.
4. Click Delete Report to confirm.

