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1 Introduction

Custom Reports feature of TO3000 can be used to obtain user-customizable reports of any data, stored in TO3000 database. For this purpose TO3000 has a built-in FastReport 4.2 editor.

Note: FastReport 4.2 is not an AIT product, and is designed by *Fast Reports Inc.* For any in-depth documentation, please visit http://www.fast-report.com.This guide includes some basic report management operations, and a brief tutorial, describing the process of designing a simple custom report.

Custom report operation in TO3000 can be divided into three general areas:

- *Reporting*, which is obtaining data from the database in the form of reports by TO3000 users.
- *Administration*, such as importing new reports, which is performed with the help of TO3000.
- *Creating and editing* custom reports, which involves working with FastReport 4.2 editor.

2 Custom reports in TO 3000 v.9

Accessing reports

Custom reports can be used to extract and view consolidated and summary information from the TO3000 database. Custom reports can be viewed, exported and printed from TO3000.

Any user with access to *custom reports* can obtain any of these reports by clicking menu **Custom Reports > List** in TO3000 window.

Note: Users without proper access rights will not be able to view custom reports. More details...

Report View Window

This window displays the list of all reports currently integrated in database.

Select a report in the list and click **Preview** button to view this report before printing or saving it.

Click **Print** button to open printer setup options dialog.

Click **Export** button to save the selected report result in a separate *RTF*, *HTML*, *PDF* or *XLS* format.

See also:

User Reports administering

Example: creating a report

3 Managing custom reports

Custom Reports settings in TO 3000

Custom reports can be created edited and deleted with the help of TO3000 .

To create, edit or delete *custom reports* open **Custom Reports** section of TO3000 **Advanced Settings** window.

1. Run TO3000 .

2. Choose **Settings**>**Advanced** from main menu.

3. Click **Custom Reports** section to open *custom report* management options.

Custom report options

The following options are available for custom reports:

- **New****Edit****Delete** buttons can be used to create\modify\delete a custom report.
- **Edit Details** button opens **Edit Custom Report** window where you can change report name and description.
- **Example: View**/**Set**/**Clear** buttons: use **Set** button to create a sample report, which will be displayed to any user browsing reports list in TO3000. Click **View** button to preview this sample, click **Clear** button to delete custom report preview sample.
- **Preview** button opens the **Preview** window where you can see how the selected report would look on paper and print it if needed.
- **Load** button can be used to import a new report to database from a *PXR2* file.
- **Save** button can be used to export selected report to a *PXR2* file.

Note: Custom reports which are displayed in **Custom Reports** section of TO3000 are the ones currently integrated into TO3000 database. *PXR2* files are used solely for export-import purposes, thus deleting *PXR2* file from \AIT\Translation Office 3000 Version 9.0\Admin\Reports will not delete any of the reports in database.

Exporting a custom report

To *export a custom report*, save required report in *PXR2* file. This file can later be imported into another TO3000 database.

1. Select the required *custom report* in the list.

2. Click **Save** button.

3. Specify name and location for *PXR2* file being saved.

Importing a custom report

You can import a custom report to your database from a *PXR2* file.

Note: Custom reports which are displayed in **Custom Reports** section of TO3000 are the ones currently integrated into TO3000 database. *PXR2* files are used solely for export-import purposes, simply copying new *PXR2* file to \AIT\Translation Office 3000 Version 9.0\Admin\Reports will not import the new report to database.

To *import a custom report*, use *PXR2* file to load required report.

1. Save *PXR2* file being imported to \AIT\Translation Office 3000 Version 9.0\Admin\Reports folder.

2. Click **Load** button.

3. Locate *PXR2* file being imported, select it and click **Open** button.

Editing a custom report

To make changes to a custom report, select this report in the list, and click **Edit** button. This will open **FastReport** window.

Note: FastReport designer is a complex tool intended for IT specialists. It requires some basic *SQL* and *Delphi* knowledge. Step-by-step creation of simpler reports is described in Example: creating a report.

For detailed information and documentation please visit the Fast Report Inc. Internet site: http://www.fast-report.com

Setting up a report example

Once a new report has been added to reports list, you can access this report (by clicking menu **Custom Reports > List**). Unless it has a pre-set example, however, the preview field to the right will remain blank.

Click **Set** button to set a new preview example of currently selected report .

Click **View** button to view current example of currently selected report.

Click **Clear** to delete current example of currently selected report.

4 Example: creating a report

This section will cover the process of creating a simple custom report.

Note: This is only a sample of FastReport engine functionality, intended for users generally unfamiliar with SQL. For SQL-versed users it is recommended to refer to FastReport manual available for download on http://www.projetex.com/documentation.html

Example:

To *create* a new *custom report*

1. Run TO3000, open **Advanced settings** window from main menu.

2. Click **Custom Reports** on **Advanced settings** window of TO3000.

3. Click **New** button; enter report name and description in the **New Custom Report** window and click **OK**.This will open **FastReport** Designer window.

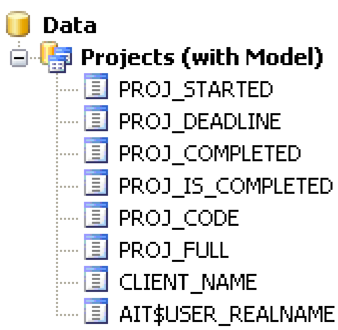
4. Add data which must be used in the report by clicking menu **Report>Data**.

This will open **Select Project Datasets** dialog window, in which all your Custom Queries are displayed. Select the required queries by selecting check boxes in front of their names. For this example we selected **Projects (with Model)** query, since we are composing a "Projects report".

Click **OK** button to confirm selection.

Note: You can create your own custom queries with the help of built-in query builder. Any custom queries created this way will appear in this dialog window.

5. Now, contents of the selected query are displayed in the **Data** field to the right:

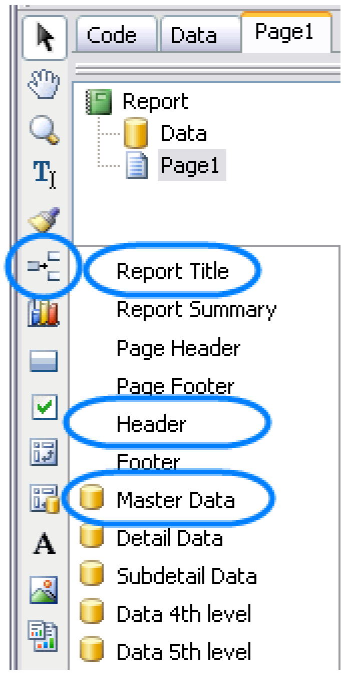


These are the fields from TO3000 database, which have been added to the query you selected. In this particular case, the fields are those, containing project names (*PROJ_FULL*) and codes (*PROJ_CODE*), dates of project timeline (*PROJ_STARTED*, *PROJ_DEADLINE* and *PROJ_COMPLETED*), information as to whether project has been completed or not (*PROJ_IS_COMPLETED*) and corresponding client names (*CLIENT_NAME*).

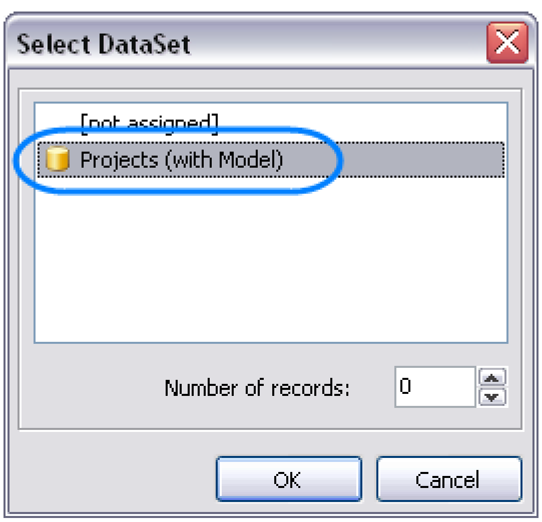
6. Begin designing your report by placing *Data Bands*.

These “bands” bind report elements together, specifying their location on the page relatively to page itself and to the other bands. For example, information in **Report Footer** band will be located at the bottom of each page of this report, while **Report Summary** band will appear only at the end of the last report page. More detailed description of the bands can be found in FastReport User Manual. For this particular report you will need to use only few of the bands available.

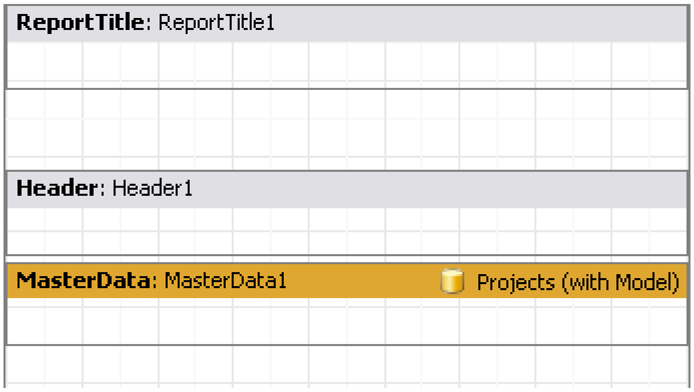
6.1. Click **Insert Band** button and select **Report Title** band. This will place mentioned band to your report page. Click **Insert Band** button again and select **Header band** to place it.



6.2. Click **Insert Band** button one more time and select **Master Data** band to place it in your report. When placing **Master Data** band select your **Projects (with Model)** query when prompted to do so:

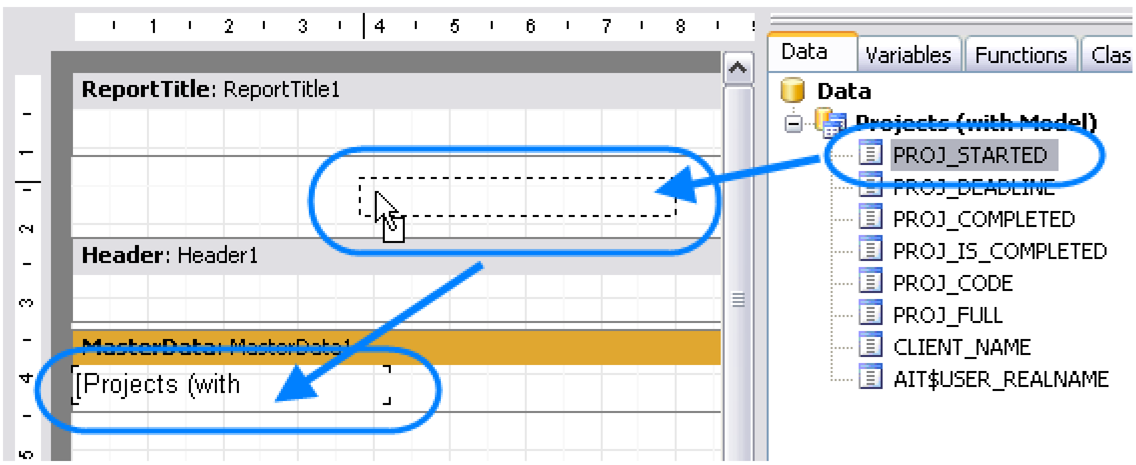


Your report page should look approximately like this:



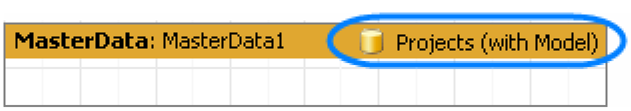
7. Adding data to **Master Data** band.

To add a variable data to your report, you will need to drag-and-drop the required fields from your query to the **Master Data** band.



Please note that any **Master Data** band can be linked to certain dataset (or query in this case) only, so in case you have more than one query, please be sure to drag and drop fields only to that **Master Data** band which has been linked to this query.

For example, the **Master Data** band below can contain fields from *Projects (with Model)* query,



Drag sequentially the following fields from the **Data** area and place them inside **Master Data** band in a row:

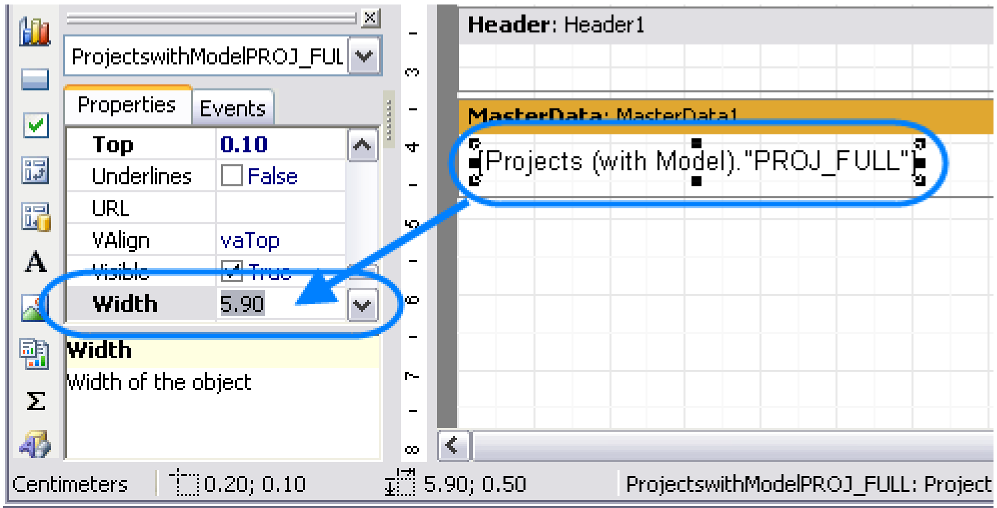
PROJ_FULL, CLIENT_NAME, PROJ_DEADLINE

When placed into your report, fields take form of text objects, like:

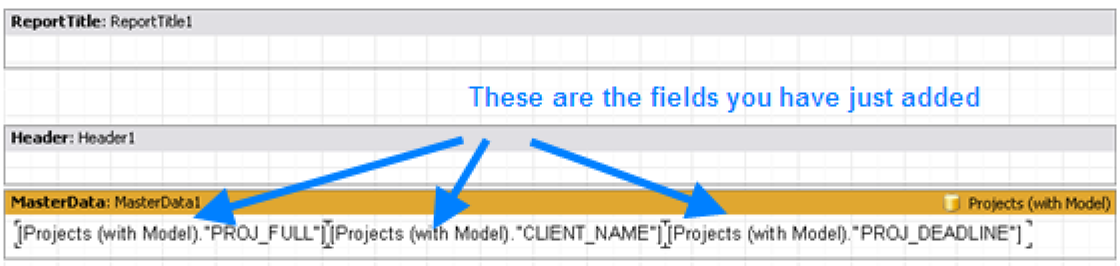
[Projects (with Model)."PROJ_FULL"]

These act very much like text variables in TO3000 RTF templates.

Note: Some of these objects may be very wide. Please try adjusting their width by dragging the borders of these objects. Alternatively, please try entering exact object length be selecting it and typing their width in **Properties** area:

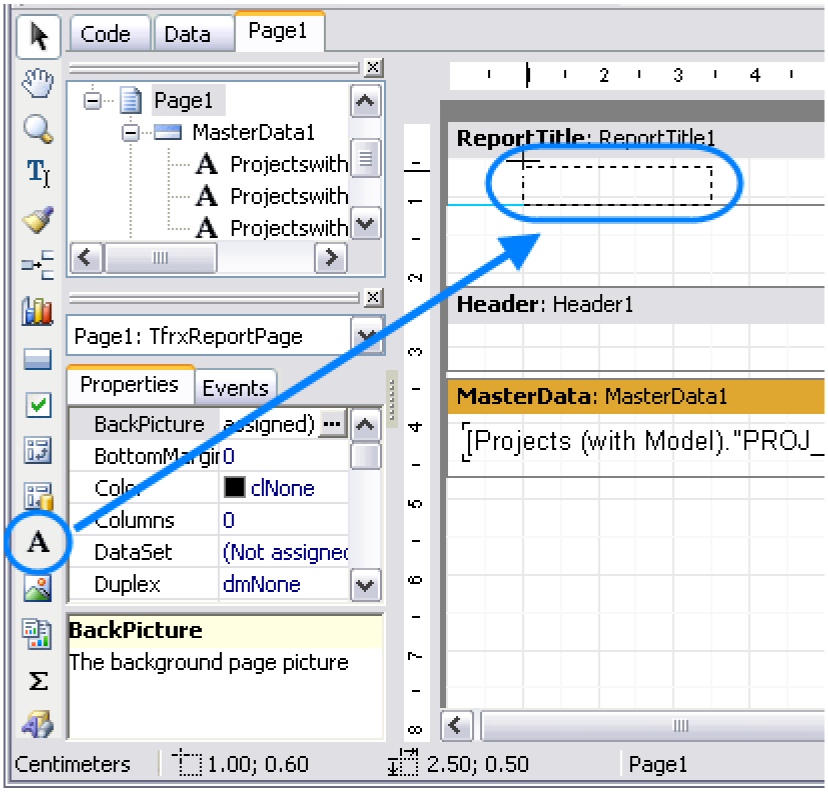


Once all the data has been added, your report should look like this:

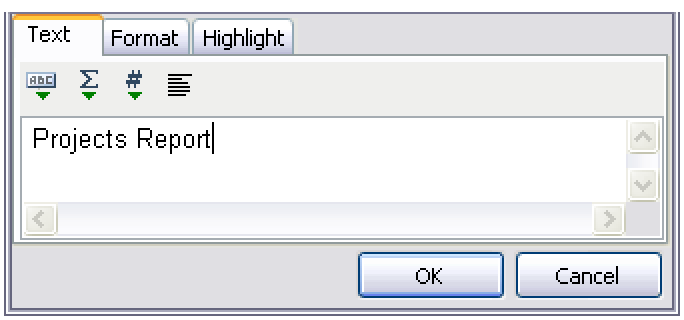


8. Adding stationary data to other bands.

8.1. Add a header for your report by clicking **Text object** button and placing the object on your report, within the **Report Title** band.

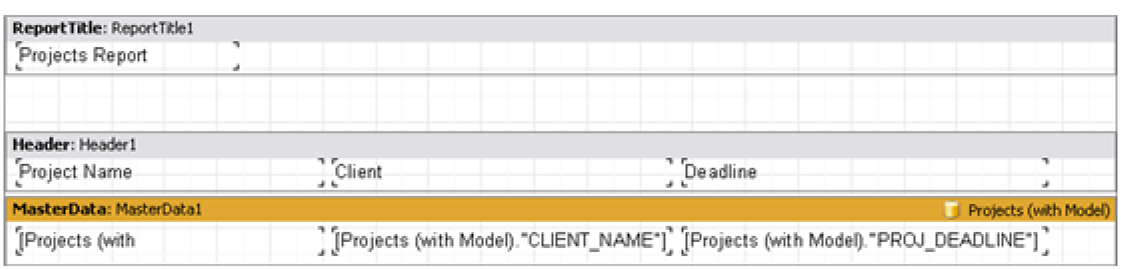


8.2. Type the header for your report in the memo window which appears.



8.3. Data will be displayed in your **Master Data** band in columns (each indicated by a field from the query). Add the names of these columns right above the query field objects in your **Header** band: *Project name*, *Client*, and *Deadline* the same way you added the header text object.

After this your report should look as follows:



9. Preview your report by clicking **Preview** button. Your report preview will be displayed in the **Preview** window.

Note: You can further configure style of your report by configuring the style of text objects. Select required text object and adjust its format in the **Properties** area to the left.

10. Save your newly created report by clicking **Save** button and close report designer.

New report is now ready to be used.

If you want to save this report in a separate file in the **Report** folder of Translation Office 3000 (so that you can send it to other Translation Office 3000 users), select the report in the list and click **Save** button.

See also:

Managing Custom Reports