

# Active Reports Training

Beginning  
Report Types



# Active Reports Training

## Beginning

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Objectives for this section



# Objectives for this session

- What defines a report
- Understanding different reporting types
  - Listing report
  - Detail report
  - Master/Detail report



# Reasons for a Report

The reports can help you quickly assess the status of a project, the quality of the service being given, and the progress toward project completion. Reports allow users see data and summarize and visualize metrics. For example, reports can tell you how your team is doing toward the goals from week-to-week, based on their actual activities.



# Active Reports Training

## Beginning

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What defines a report



# What are the Components of a Report

- Data Model Objects
  - Queries, Groups, Columns, Tables, Parameters
- Layout Objects
  - Label, Textbox, RichTextBox, Shape, Picture, line, ReportInfo, ...
- Enhance Reports with Code
  - C# scripting



# Active Reports Training Beginning

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Reporting Types for this Training




## Listing Type Reports

List-type reports such as customer addresses, lists of services and lists of providers are vitally important in running the daily operations of a business. So it is vital that you be able to write your own when you need them.





# Listing Type Report Example



Student Location  
4/5/2009 10:08:25 AM  
ESG Admin


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Report Selection Criteria

Report Date: 4/15/2008 12:00:00 AM

Name	Location
trName1	trTask1

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## Detail Type Report

Detail-type reports such as a specific customer data, intricate information on a service or provider are vitally important pieces of information for the business or client.



# Detail Example

OMB Approval No.  
2965-0015 - Respondent

 <b>Department of Veterans Affairs</b>		<b>STATEMENT IN SUPPORT OF CLAIM</b>	
<p><b>PRIVACY ACT INFORMATION:</b> The law authorizes us to request the information we are asking you to provide on this form (38 U.S.C. 501(a) and (b)). The responses you submit are considered confidential (38 U.S.C. 5701). They may be disclosed outside the Department of Veterans Affairs (VA) only if the disclosure is authorized under the Privacy Act, including the routine uses identified in the VA system of records, 58VA21/22, Compensation, Pension, Education and Rehabilitation Records - VA, published in the Federal Register. The requested information is considered relevant and necessary to determine minimum benefits under the law. Information submitted is subject to verification through computer matching programs with other agencies.</p> <p><b>RESPONDENT BURDEN:</b> VA may not conduct or sponsor, and respondent is not required to respond to this collection of information unless it displays a valid OMB Control Number. Public reporting burden for this collection of information is estimated to average 15 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. If you have comments regarding this burden estimate or any other aspect of this collection of information, call 1-800-827-1000 for mailing information on where to send your comments.</p>			
<b>FIRST NAME - MIDDLE NAME - LAST NAME OF</b> (Type or print)		<b>SOCIAL SECURITY NO.</b>	<b>VA FILE NO.</b>
CHARLIE BROWN		445-65-4654	C/CSS -
<p>The following statement is made in connection with a claim for benefits in the case of the above-named person:</p> <p>brown, charlie 445-65-4654 03/14/2009 vkvbbjbbhjhnlkjkn_jhnlknljnlkn</p>			
I CERTIFY THAT the statements on this form are true and correct to the best of my knowledge and belief.			
<b>SIGNATURE</b>		<b>DATE SIGNED</b>	
_____		03/14/2009	
<b>ADDRESS - 1 Main</b>		<b>TELEPHONE NUMBERS</b>	
Houston, TX 77054		<b>DAYTIME</b>	<b>EVENING</b>
_____		_____	_____
<p><b>PENALTY:</b> The law provides severe penalties which include fine or imprisonment, or both, for the willful submission of any statement or evidence of a material fact, knowing it to be false.</p>			

VA FORM 21-4138  
JUN 2000

EXISTING STOCKS OF VA FORM  
21-4138, APR 1994, WILL BE USED



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## Master/Detail Type Report

This style of report is usually used to display data in a hierarchical view. Reports such as a customer to services data, Provider to services or Provider to Clients listings area examples of these types of reports.



# Master/Detail Example

County Auditor Form #1268A  
Harris County, Texas (Rev 02/99)

### Request For Payment

This Form is used for claims for payment for any goods or services that do not require by law Purchasing Department assistance. Other request for payment should be made by using the applicable form.

Payable to: HC-CSD Social Services Date: 04/05/2009  
 PEID#: 740694415(RS) Department: \_\_\_\_\_  
 Address: \_\_\_\_\_ Division: \_\_\_\_\_  
 \_\_\_\_\_ Commissioner's Court Approval  
 \_\_\_\_\_ Date: \_\_\_\_\_

Invoice Number	Quantity	Description	Account Coding				Amount
			GL Codes		Job Ledger Codes		
			Org Key	Object	JL Key	Object	
		Relevant Care - 2008					
		Mar 01, 2009 - Apr 05, 2009					
		Minus Cancelled Check 5505	22625002	881800			-\$300.00
							-\$300.00

I certify that this claim is true and correct, that the supplies, materials, and services herein enumerated and for which payment is requested are necessary to the public business, and that I approve these items for payment and that no payment for these items has been previously requested.

**Approved for Payment**

_____	_____
Official	Date
_____	801-451-2885
Prepared By	Telephone No.

For County Auditor's Use Only

Processed By: \_\_\_\_\_ Batch No. \_\_\_\_\_ Batch Date: \_\_\_\_\_



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# Summary of this session

- You should now understand the components of a report
- You should now be able to explain the following report types
  - Listing report
  - Detail report
  - Master/Detail report



# Next Section

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Technical Architecture >>

