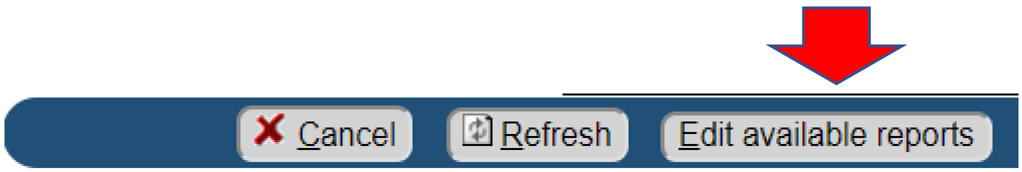
General Information

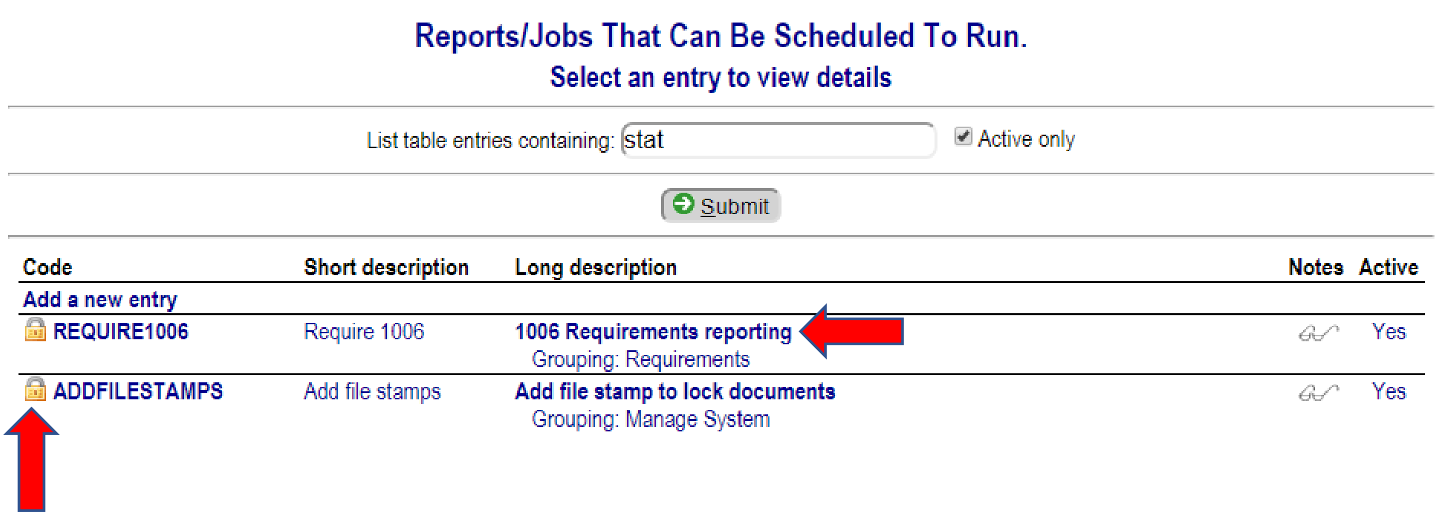
To Edit a Report:

Menu | Miscellaneous | Reporting | Reports

Click the **Edit available reports** button at the bottom of the screen.

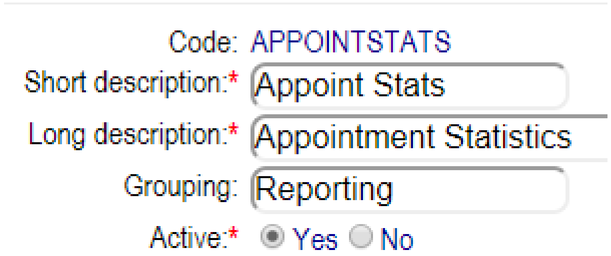


This will bring up a list of all the reports available in the system. You can type a partial word in the List tables entries containing and click the **Submit** button to narrow the search to only those reports that contain what you typed. You can search active only reports or unclick it to include the reports that are inactive.



The padlock before the code is a shortcut to the authority for this report.

Click on the Code or Long description to open the report settings.



- **Code** – This is the code for this particular report. You can make multiple copies of reports but each must have a unique code. Click the **New** button to copy the report.
- **Short description** – a 15 character max description of the report.
- **Long description** – a long description of the report which the users will see when they wish to run a report.
- **Grouping** – If you type the exact same word for multiple reports they will all be grouped together in the list of reports the users see.

Click the **Update** button to save your work.

The Notes section is where the report settings are placed.

Report Settings:

There are required settings for the programmers. This information tells them this is the programmed report you are running regardless of what you call your report. Any time you talk to G&W about a report, they will ask you what report you are running. They don't want to know the name of your report, they want to know this name. You can't modify this section, the report won't run if you do.

```
# -- Required settings --
class=equest.app.reports.CaseAssignmentsForPeriod
jobQ=batch
```

There are also Optional Settings that each report has. Some reports have date ranges, some have special Roles you must select. All those are in the optional report settings section. If the sections are numbered, they must be in sequential number and you can't skip any numbers. You can't go from a .1= section to a .3= section. If it doesn't find a .2= it will stop running.

-- Optional Report settings --

These are standard report options that can be used in most reports:
A pound symbol makes this line a comment.

Dates:

# .default values for date and dateTime types:	prompt.parm.1=startDate
# today	prompt.parm.1.type=date
# +-n	prompt.parm.1.label=From date
# begMonth	prompt.parm.1.required=true
# endMonth	prompt.parm.1.default=begPrevMonth
# begPrevMonth	
# endPrevMonth	prompt.parm.2=endDate
# begQuarter	prompt.parm.2.type=date
# endQuarter	prompt.parm.2.label=To date
# begPrevQuarter	prompt.parm.2.required=true
# endPrevQuarter	prompt.parm.2.default=endPrevMonth
# begYear	
# endYear	
# begPrevYear	
# endPrevYear	

Sending people copies of the report:

report.notify.userid.1=kim.hughey@tn.gov
report.notify.userid.1.method=email
report.notify.userid.2=lisacaldwell@weakleycotn.gov
report.notify.userid.2.method=email
report.notify.userid.3=kt.gkmsi@gmail.com
report.notify.userid.3.method=email
report.notify.userid.4=cmbres
report.notify.userid.5=phickman
report.notify.userid.6=smyers

Sending by Email

Sending by Quest Messaging

Sequential numbering:

# Map case status to report categories.
# cat.closed.n=<case status>
cat.closed.1=CLSD/02
cat.closed.2=REFR/10
cat.closed.3=CLSD/16
cat.closed.4=CLSD/17
cat.closed.5=CLSD/27
cat.closed.6=REFR/18
cat.closed.7=REFR/18C
cat.closed.8=REFR/10C
cat.closed.9=36

Name of the Table

Codes from that Table

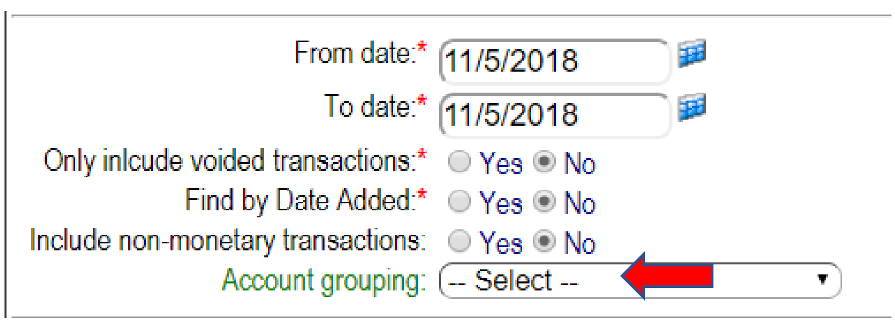
Tracing a specific person:

In some of the reports you can use the setting "trace" which allows you to trace the transactions for a specific person ID.

trace.1=27010

Account Groupings:

The financial reports may ask the user to select the "account grouping"



prompt.parm.6=accountGrouping
prompt.parm.6.type=tables
prompt.parm.6.length=4
prompt.parm.6.label=Account grouping
prompt.parm.6.required=false
prompt.parm.6.primaryValue=AccountGrouping

accountGrouping=prob

You can replace the question with the programing

This is referring to the Table: AccountGrouping where you can put each account from the chart of accounts into a specific group, such as probation or clerk so the transactions can be separated.

```
# -- Required settings --
class=equest.app.reports.CaseAssignmentsForPeriod
jobQ=batch

# -- Optional Report settings --
#report.notify.userid.1=xxxxxx
prompt.parm.1=startDate
prompt.parm.1.type=date
prompt.parm.1.label=Start date
prompt.parm.1.required=false
prompt.parm.1.default=-1

prompt.parm.2=endDate
prompt.parm.2.type=date
prompt.parm.2.label=End date
prompt.parm.2.required=false
prompt.parm.2.default=-1

prompt.parm.3=includeFirstOnly
prompt.parm.3.type=boolean
prompt.parm.3.label=Include first assignments only
prompt.parm.3.required=true
prompt.parm.3.primaryValue=n

prompt.parm.4=message1
prompt.parm.4.type=message
prompt.parm.4.label=NOTE
prompt.parm.4.primaryValue=If "Yes", then only the first assignment for a given role on a case will be included.

prompt.parm.5=court
prompt.parm.5.type=courts
prompt.parm.5.label=Court (leave blank for all Courts)
prompt.parm.5.required=false
```