

# **SIMS Custom Reports**

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# Introduction

## Welcome

SIMS reporting capabilities fall into three major categories. There are pre-defined reports. These can be selected from the Reports menu. Every module will have a Summary and Detail Report. Then there are Quick Reports. This is a quick way to create a report based on your selection of fields. This is discussed in the SIMS User Guide.

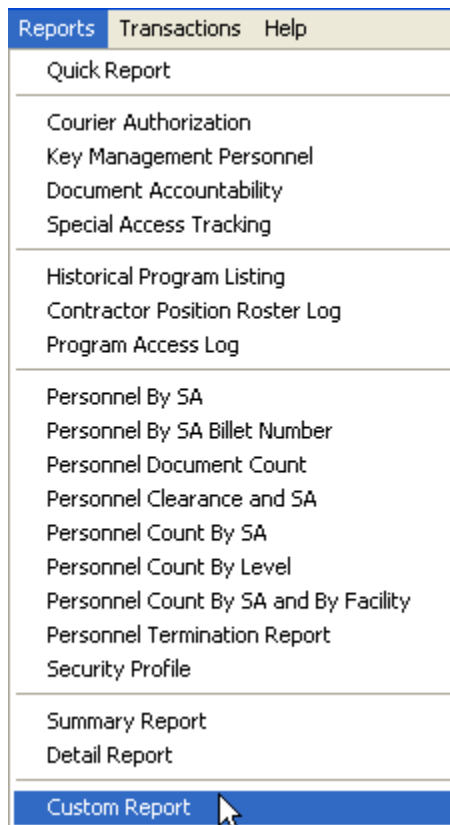
If there is a report that you want to create and it cannot be done by using a pre-defined report, or by using a Quick Report, SIMS has a way to create custom reports. A new report can be created, or one of SIMS pre-defined reports can be customized. We recommend this as the last option, and for a user that has programming experience. This User Guide will discuss the custom editor and how it can be used.



# Getting Started

## Overview

When going to one of the modules (i.e. Host Facilities, Personnel, etc.), there will be a **Custom Report** option available in the **Reports** Menu.

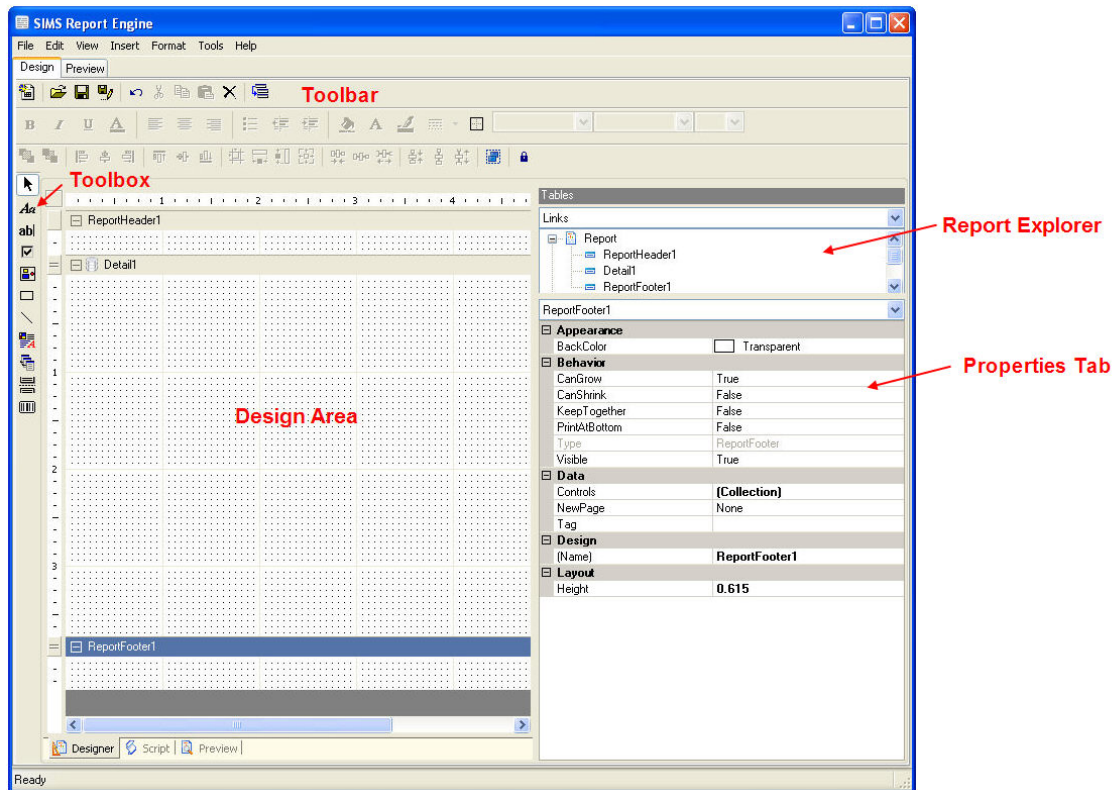


After selecting the **Custom Report** option, the Custom Report editor will appear. The main sections of the Custom Report editor are:

- Toolbar
- Toolbox
- Design Area
- Report Explorer
- Properties Tab

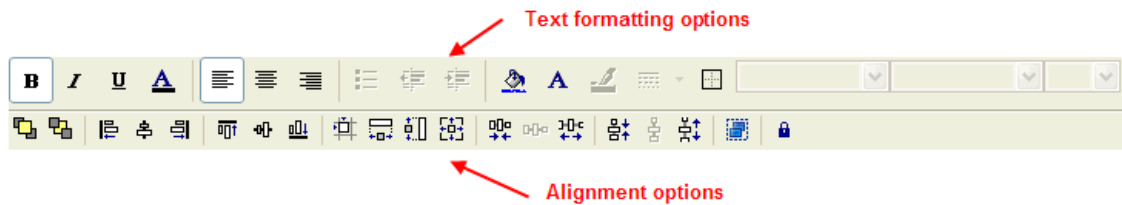
These areas of the Custom Report editor will be discussed in the Getting Started sections below.

# SIMS Custom Reports



## Toolbar

The Toolbar is used primarily for text formatting and for aligning objects on the layout. This section will discuss the icon options and what they do.



### Text Formatting

The first row contains text formatting options. Select the control in the Design Area. The buttons in the Toolbar will become active if they can be used for the selected control. They will be grayed out if they cannot be used with the selected control.

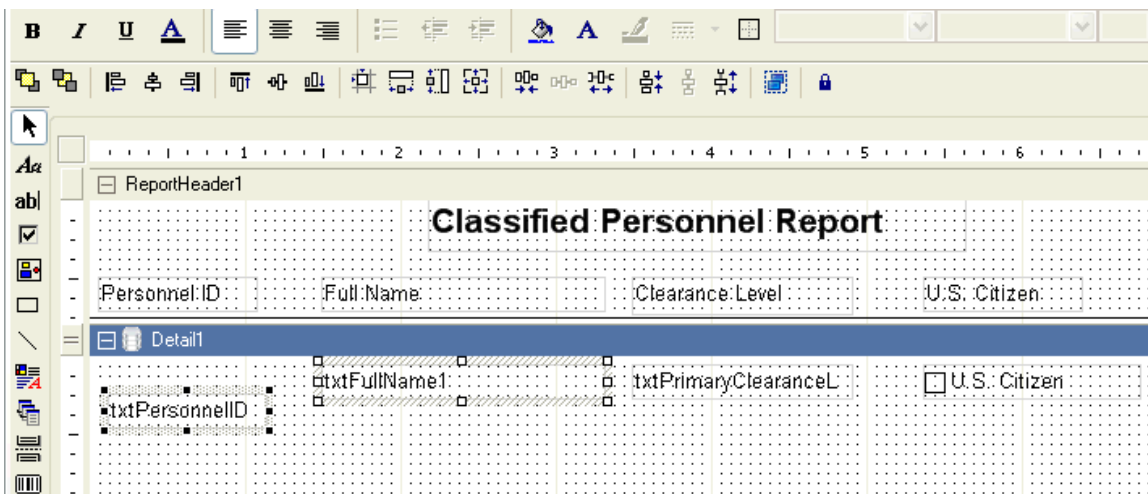
Field Name	Description
Bold	Applies bold formatting.

Italic	Applies italic formatting.
Underline	Applies underline formatting.
Font Settings	Allows you to select a font type and font size.
BackColor	Allows a background color to be applied to the selected control.
ForeColor	Allows a foreground color to be applied to the selected control.
Align to Grid	Aligns the control to the nearest grid point.
Lock Control	Locks the control onto the layout so that it cannot be moved.

### ***Alignment Options***

The second row contains alignment options. Multi-select two or more objects in the Design Area. The options in the second row of the Toolbar will become active.

In the example below, the txtPersonnelID object is selected. A ctrl left click is used to select the txtFullName1 object. The second object and any subsequent objects can be selected by using the ctrl left click method. Once an alignment option (i.e. align tops) is selected, the objects will align relative to the last selected object on the layout.



Field Name	Description
Bring to Front	Use this when you want to bring the object to the front, especially when using 2 overlapping controls.
Send to Back	Use this when you want to set the object to the back, especially when using 2 overlapping controls.
Align Lefts	Align the left sides of multiple controls on the layout.

## SIMS Custom Reports

Align Centers	Align the centers of multiple controls on the layout.
Align Lefts	Align the left sides of multiple controls on the layout.
Align Tops	Align the tops of multiple controls on the layout.
Align Middles	Align the middles of multiple controls on the layout.
Align Bottoms	Align the bottoms of multiple controls on the layout.

Field Name	Description
Same Size Width	Make the controls the same width.
Same Size Height	Make the controls the same height.
Same Size Height + Width	Make the controls the same height and width.
Decrease Horizontal Space	Decreases the horizontal spacing between the selected controls.
Increase Horizontal Space	Increases the horizontal spacing between the selected controls.
Decrease Vertical Space	Decreases the vertical spacing between the selected controls.
Increase vertical Space	Increases the vertical spacing between the selected controls.

## Toolbox

The Toolbox contains controls which are used in the Design Area of the Custom Editor. The table below describes the controls and what they can do.

Field Name	Description
Pointer	Allows you to select controls or sections of the report.
TextBox	Allows you to insert a text box onto the report. It can be used to display text, or it can be bound to a data field.
Label	Allows you to insert a label control onto the report. It can be used to display text, or it can be bound to a data field.

Checkbox	Allows you to insert a checkbox bound control onto the layout. It is typically used in conjunction with boolean type data fields.
Picture	Allows you to insert an image onto the report.
Shape	Allows you to insert a circle, square, or rectangle onto the report.
Line	Allows you to insert a line control.
Rich Textbox	Allows you to insert Rich Text in the report.
Subreport	Allows you to insert a subreport. This allows you to link to related tables, especially when the field is not found in the "outputlist". This is discussed later in this User Guide.
PageBreak	Allows you to insert a page break in the report .
BarCode	Allows you to insert a barcode control on the report.

## Design Area

This is where the report layout will be created. The Design Area contains the following components:

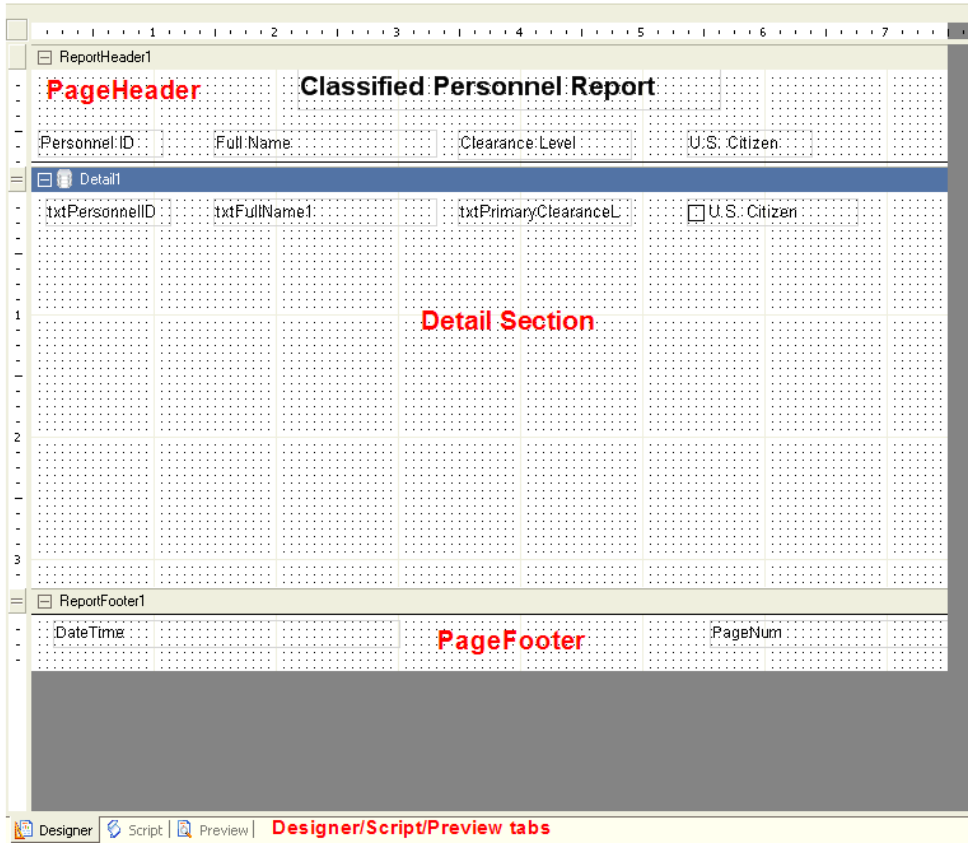
**PageHeader** - This section is used for information that needs to be printed once at the top of each page. Examples include, column headers and page titles.

**Detail Section** - This is the body of the report. It prints once for each record.

**PageFooter** - This section is used for information that needs to be printed once at the bottom of each page. Examples include, date/time stamps, and page numbers.

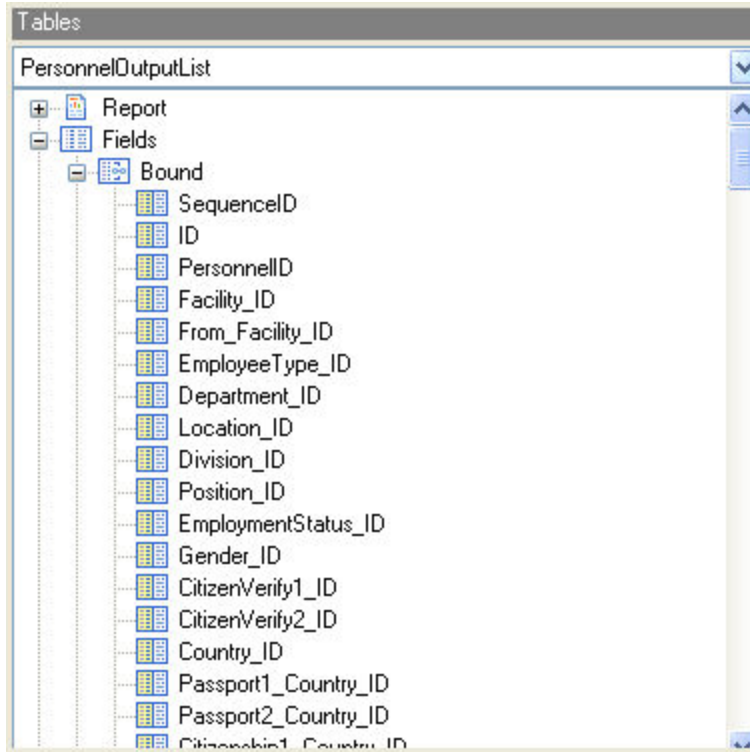
**Designer/Script/Preview tabs** - These tabs allow you to switch to the different views. The designer view is where the report is created. The scripts view is where any code can be added to the report. The preview tab allows you to preview how the report will look and behave at run-time.

## SIMS Custom Reports



## Report Explorer

The Report Explorer appears in the upper right hand side of the Custom Editor. It is used primarily to add fields to the Design Area.



## Properties Tab

The Properties Tab is used to edit the appearance, behavior, data, design, and layout of the controls.

To view the properties of a control, select it in the Design Area, or by selecting the control name in the Properties Tab drop-down list.

## SIMS Custom Reports

TextBox1	
<b>Appearance</b>	
Alignment	Left
BackColor	<input type="checkbox"/> Transparent
<b>Font</b>	
Font	<b>Arial, 10pt</b>
ForeColor	<input checked="" type="checkbox"/> Black
OutputFormat	
Style	
VerticalAlignment	Top
<b>Behavior</b>	
CanGrow	True
CanShrink	False
MultiLine	True
RightToLeft	False
Visible	True
WordWrap	True
<b>Data</b>	
ClassName	Normal
CountNullValues	False
DataField	<b>=System.DateTime.Now.ToString</b>
HyperLink	
Tag	
Text	<b>TextBox1</b>
<b>Design</b>	
(Name)	<b>TextBox1</b>
<b>Layout</b>	
Location	<b>0.021, 0.031 in</b>
Size	<b>2, 0.2 in</b>
<b>Summary</b>	
DistinctField	
SummaryFunc	Sum
SummaryGroup	
SummaryRunning	None
SummaryType	None

Select the control using this list box.

Often times, the appearance section is used to change the font and point size. In the Behavior area, the CanGrow/CanShrink properties are useful for a field that uses remarks since the text can vary in length. In the Data section, the DataField property is most often used. When edited, it allows you to select a field from a table in the OutputList. In the Footer example, it will explain the use of a field expression, which allows you to add code in the DataField property. The controls can be moved around in the layout, but you may want to precisely position a control. The location and size properties are very useful in those cases.

# Creating a Report

## Designing a Layout

The Design Area is where you can use controls from the Toolbox to create a layout for your report. We can create a report within any of the modules in SIMS. We will use the Personnel module as an example.

First, go to the Personnel module. Select a record or group of records that you want to report on, and then select the Custom Editor option from the Report menu.

Note: While in the editor, you will be able to preview the report. If you have one record selected in the Personnel Module, the report will only display information for the one selected record. If you have a group of 2 or more records in the Personnel Module, the report will repeat once for each record.

## SIMS Custom Reports

**SIMS SOFTWARE**

### Visit Request

**VISIT REQUEST # 1**  
 Contractual?  Non-Contractual?  
Contract ID: F49620-93-C-0100

**Purpose of Visit:** Review Software for Fixed Wing Launch Platform Interface for AIM-9P-3 Sidewinder  
**Visit Period - from** 01/10/06 **to** 01/09/07

**To Facilities**

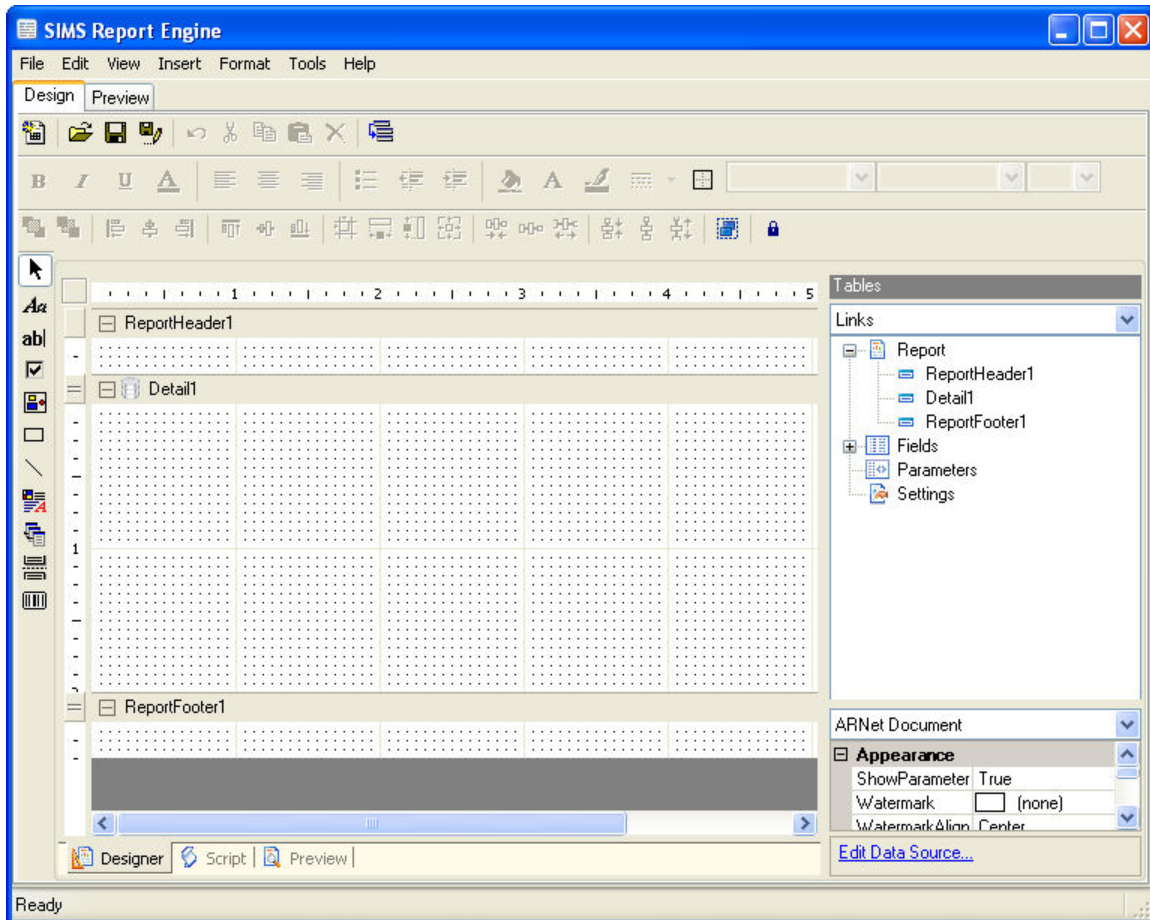
<b>To:</b> Large Software Systems, Inc. 2000 Colorado Street Atlanta, GA 38647	<b>Contact:</b> Wanda Wallaby <b>Contact Phone:</b> (213) 666-9090
<b>ID:</b> C1000	<b>Facility Phone:</b>
<b>Fax:</b>	

**Visitors**

Designer | Script | Preview

The Editor will open. In the Design Area, you will be able to:

- Add fields to the body of the report.
- Add a header, such as a title or column headers, to the report.
- Add a footer, such as a time stamp and page number, to the report.

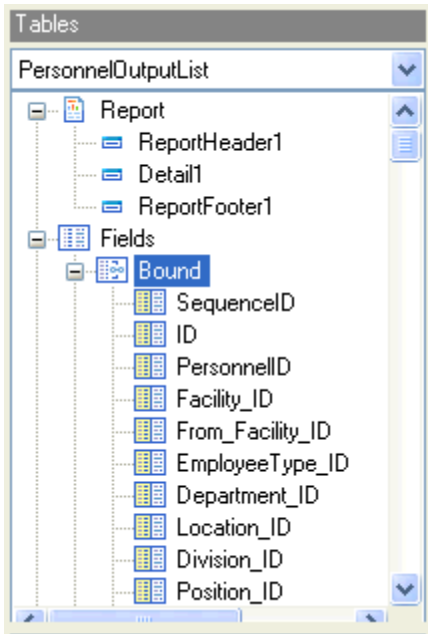


## Adding Fields

### *Using the OutputList Table*

The easiest way to start creating a layout is by selecting the OutputList table. Every module has one. In this case, since we are in the Personnel module, we will look for the PersonnelOutputList. In the Report Explorer, select the PersonnelOutputList from the Tables drop-down list.

## SIMS Custom Reports

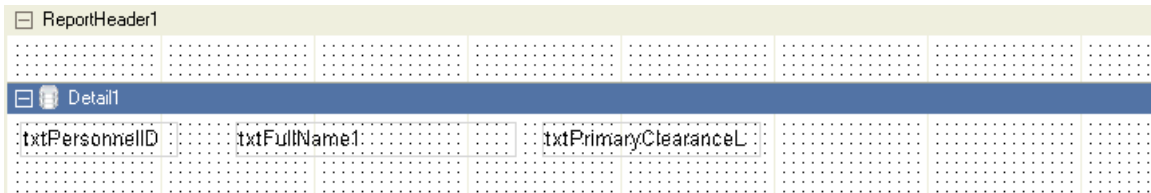


The fields can be dragged/dropped onto the layout.

### **Example:**

Here are some fields that you can add to the layout:

PersonnelID  
FullName  
PrimaryClearanceLevel



Once you have your fields on the layout, you might want to start re-sizing and aligning the fields. You can use the Properties Tab or you can use the sizing options in the Tool Bar.

You can use the OutputList table to add fields to the report. In the Tables drop-down list, there are related tables. If the field that you need is not in the OutputList, you will need to use a related table and a sub-report.

### ***Using the Toolbox***

Another way to add fields onto the layout is by using the Toolbox. Drag/dropping fields from the OutputList table works great if you are going to use a text box

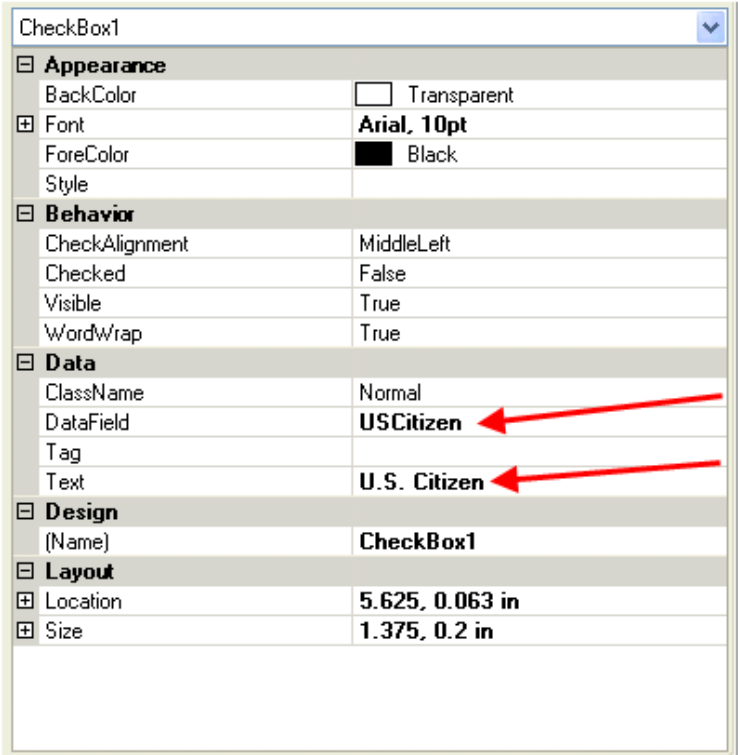
control. In some cases, you might want to bind a field to something other than a text box, such as a checkbox.

First, drag/drop the checkbox control onto the layout. Next, view the Properties Tab.

- 1. In the Data section, there is a DataField property. In this list, select the field USCitizen.

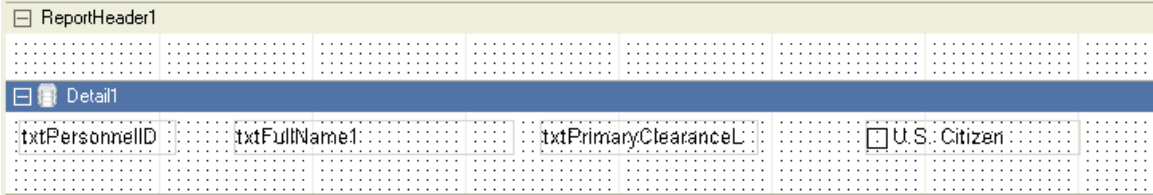
This will bind the checkbox to the USCitizen field. If USCitizen is true, the checkbox will be checked. If it is false, it will be unchecked. The following are examples of boolean type fields that can be used with a checkbox: Archived, Terminated, Courier.

- 2. Change the text by editing the Text property: U.S. Citizen.



Select a DataField from the list

Edit the text for the CheckBox Control



## Viewing the Report

The report can be viewed at any time by selecting the Preview Tab.

See also...

Toolbar

Toolbox

Properties Tab

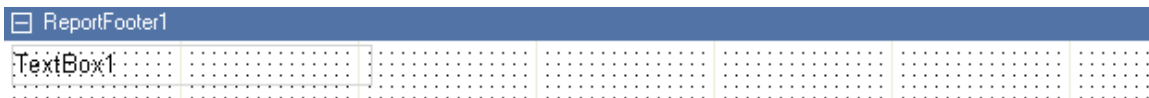
## Adding a Footer

The ReportFooter allows you to add a footer to the report. For instance, you could add a date/time stamp and a page number. The information in the ReportFooter will print one time for every page of the report. The following are examples of adding a date/time stamp and page number to a report.

### ***Adding a Date/Time Stamp***

---

Drag/drop a text box object onto the ReportFooter. In this case, we will use a text box control for the date/time stamp on the report. Drag/drop the text box control onto the PageFooter area.



View the Properties Tab for this control.

To add a date/time stamp, you will need to use a Field Expression.

To do this, edit the **DataField** property: =System.DateTime.Now.ToString()

Now when you go to preview the report, the report will display a date and time stamp.

TextBox1	
<b>Appearance</b>	
Alignment	Left
BackColor	<input type="checkbox"/> Transparent
<b>Font</b>	
Font	<b>Arial, 10pt</b>
ForeColor	<input checked="" type="checkbox"/> Black
OutputFormat	
Style	
VerticalAlignment	Top
<b>Behavior</b>	
CanGrow	True
CanShrink	False
MultiLine	True
RightToLeft	False
Visible	True
WordWrap	True
<b>Data</b>	
ClassName	Normal
CountNullValues	False
DataField	<b>=System.DateTime.Now.ToString</b>
HyperLink	
Tag	
Text	<b>TextBox1</b>
<b>Design</b>	
(Name)	<b>TextBox1</b>
<b>Layout</b>	
Location	<b>0.021, 0.031 in</b>
Size	<b>2, 0.2 in</b>
<b>Summary</b>	
DistinctField	
SummaryFunc	Sum
SummaryGroup	
SummaryRunning	None
SummaryType	None

**Adding Page Numbers**

Drag/drop a text object onto the ReportFooter. In this case, we will use a text box control for the page number on the report. Drag/drop the text box control onto the PageFooter area.

ReportFooter1	
TextBox1	TextBox2

## SIMS Custom Reports

View the Properties Tab for this control.

Select the Summary Type field, and there will be a list of options. Select PageCount. Now when you go to preview the report, the report will display a page number.

TextBox2	
<b>Appearance</b>	
Alignment	Left
BackColor	<input type="checkbox"/> Transparent
<b>Font</b>	
Font	<b>Arial, 10pt</b>
ForeColor	<input checked="" type="checkbox"/> Black
OutputFormat	
Style	
VerticalAlignment	Top
<b>Behavior</b>	
CanGrow	True
CanShrink	False
MultiLine	True
RightToLeft	False
Visible	True
WordWrap	True
<b>Data</b>	
ClassName	Normal
CountNullValues	False
DataField	
HyperLink	
Tag	
Text	<b>TextBox2</b>
<b>Design</b>	
(Name)	<b>TextBox2</b>
<b>Layout</b>	
Location	<b>5.438, 0.042 in</b>
Size	<b>0.958, 0.2 in</b>
<b>Summary</b>	
DistinctField	
SummaryFunc	Sum
SummaryGroup	
SummaryRunning	None
SummaryType	<b>PageCount</b>

See also...  
Toolbar

Toolbox  
Properties Tab

## Adding a Header

The ReportHeader allows you to add a title to the report. It is also useful when adding column titles. The information in the ReportHeader will print one time for every page of the report. The following is an example of adding a title and some columns to a report.

### ***Adding a Title to the Report...***

---

Drag/drop a label or text object onto the ReportHeader. In this case, we will use a label control for the title of the report.

Select the label and then view the Properties Tab.

Notice that the Text property says: Label1.  
Edit this so that it will be: Classified Personnel Report.  
Select the Font property.  
Edit it so that it is: Arial, 10 PT, Bold.

Notice that the label changes to reflect the change in text. The title of the report should look like the one shown below.

### ***Adding Column Headers to the Report...***

---

We can now add column headers to the report. Drag/drop 3 labels onto the report. Use the Properties Tab to edit the Text property for each label:

Personnel ID  
Full Name  
Clearance Level

Multi-select all the labels in the editor, and in the Properties tab, change the font to: Arial, 10 PT, Bold.  
All the column heads will update with the new font.

Once you have your controls in the Header, you might want to start re-sizing and aligning the fields. You can use the Properties Tab or you can use the sizing options in the Toolbar.

The report should now look like the following...



# Pre-Defined Reports

## Editing Pre-Defined Reports

Most of the modules in SIMS have pre-defined reports. Users can select these reports by going to the Reports menu.

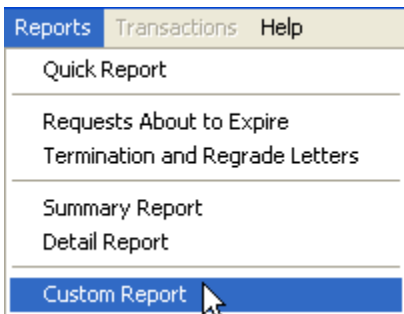
Here is an example. While in DoD Requests, there is a option to print an Industrial Visit Request report when selecting Detail Report in the Reports menu. You may want to customize this report by adding your company logo in the header. Another example is the Visitor Badges report. You may want to change the color of the badge in the Visitor Badges report. SIMS allows you to open and edit the pre-defined reports. The following sections will describe two examples on how a pre-defined report can be customized.

See also... Using a Custom Report.

## Visit Request Report

This example will discuss how to customize the DoD Industrial Detail Report. It will go through the steps in opening and editing the report so that we can add a company logo in the header.

1. First, you need to go to the module in which you want to edit the report. In this case, we need to go to DoD Requests. Select the record or group of records that you want to report on. Note: This is helpful because when we select Preview, the report will display the data for the selected group of records.

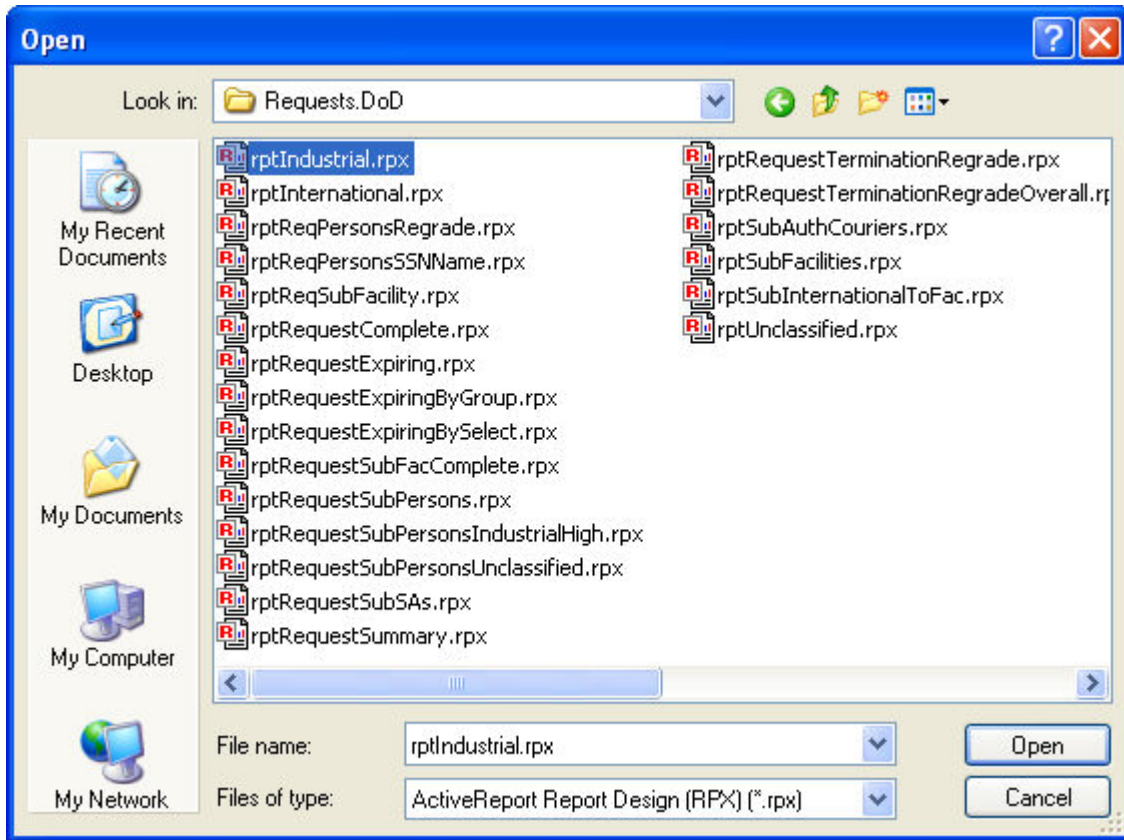


2. The Custom Editor will display. Next, we need to open the report by selecting the Open option under the File menu. The .rpx file can be found under the SIMS install. In this example, SIMS was installed in the default location so the path to the rptIndustrial.rpx file is:

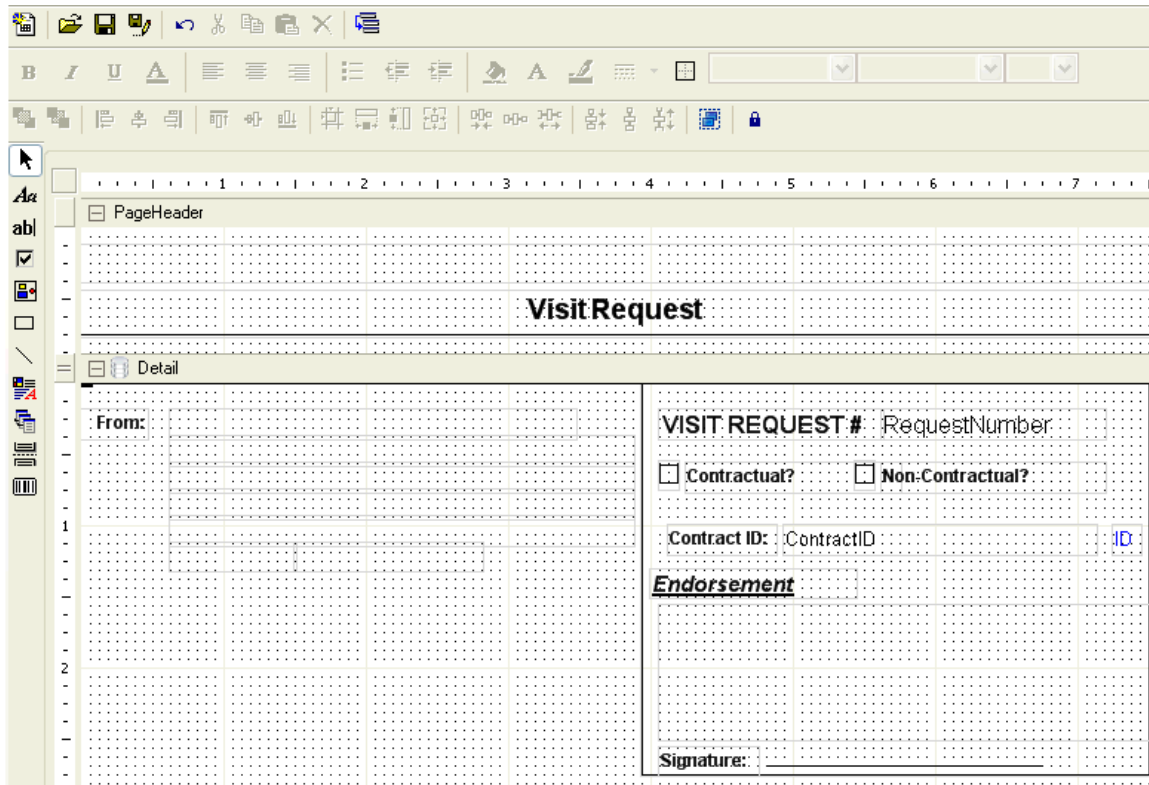
## SIMS Custom Reports

C:\Program Files\SIMS Software\Client\Modules\Reports\Requests.DoD

Select the rptIndustrial.rpx, and then choose the Open Button.



3. The report will display.



4. Select the two labels in the PageHeader. For the top label, we can edit its Properties. We can edit the location and width so that we can make room on the left for a company logo.

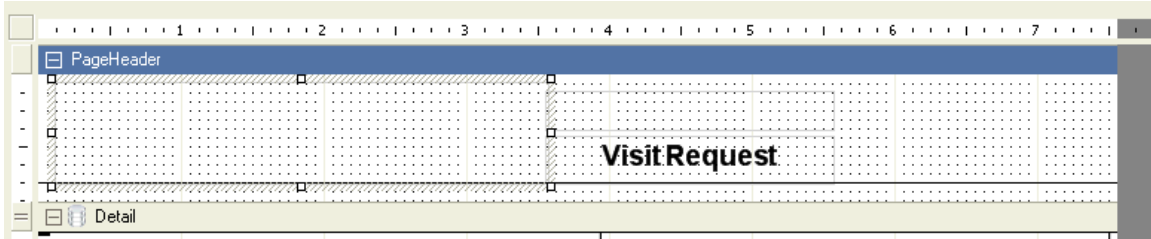
Layout	
Location	3.563, 0.125 in
Size	2, 0.25 in

5. Select the bottom label which displays the words "Visit Request" in the PageHeader. We can edit its Properties. We can edit the location and width so that we can make room on the left for a company logo.

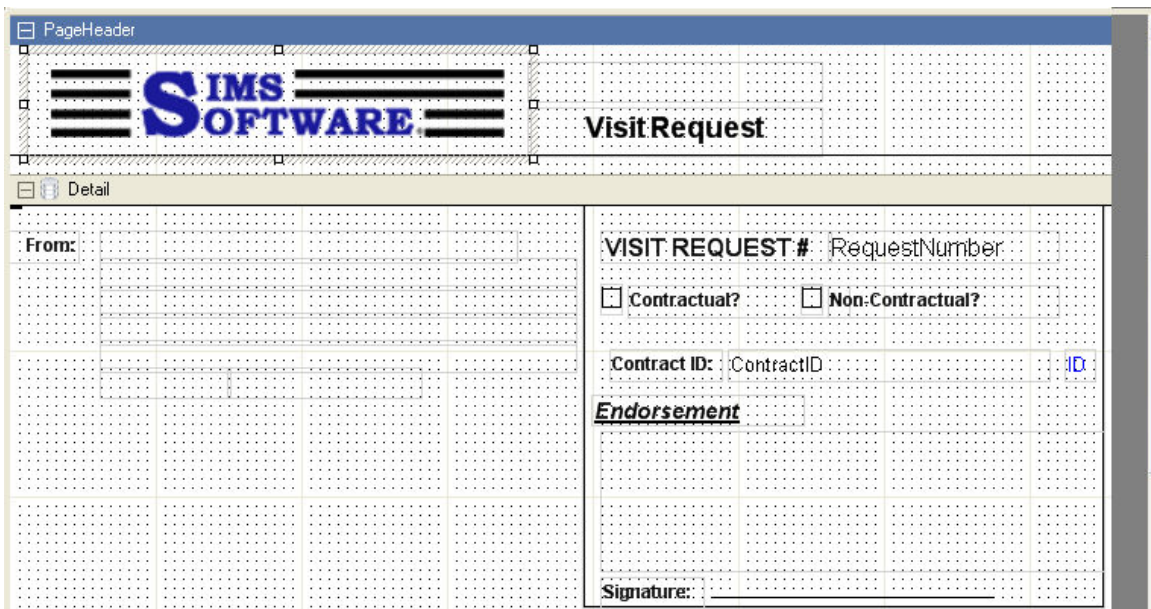
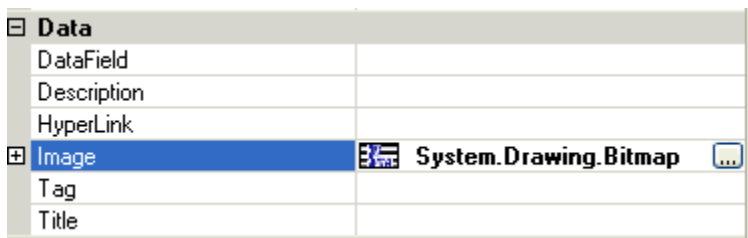
Layout	
Location	3.563, 0.438 in
Size	2, 0.313 in

6. Drag/drop a Picture control from the Toolbox onto the layout area's PageHeader.

## SIMS Custom Reports



7. If you view the Properties of the Picture control, notice that it has a property for image. Select it, and an Open dialog will appear so that you can select an image type file. In this example, we'll use the SIMS logo. The file path will appear in the Properties Tab and the layout will update to display the logo.



8. Select the Preview Tab at the bottom of the Design Area, and you can see how the report will display at run-time.

See the section on Using a Custom Report.

It will discuss how to save and use a pre-defined report that has been edited.

Print... | [Icons] | 100% | 1/4 | Backward | Forward

**IMS SOFTWARE**

### Visit Request

**VISIT REQUEST #** 1

Contractual?     Non-Contractual?

**Contract ID:** F49620-93-C-0100

**Purpose of Visit:** Review Software for Fixed Wing Launch Platform Interface for AIM-9P-3 Sidewinder

**Visit Period - from** 01/10/06 **to** 01/09/07

**To Facilities**

**To:** Large Software Systems, Inc.  
2000 Colorado Street  
Atlanta, GA 38647

**Contact:** Wanda Wallaby  
**Contact Phone:** (213) 666-9090

**ID:** C1000  
**Facility Phone:**

**Fax:**

**Visitors**

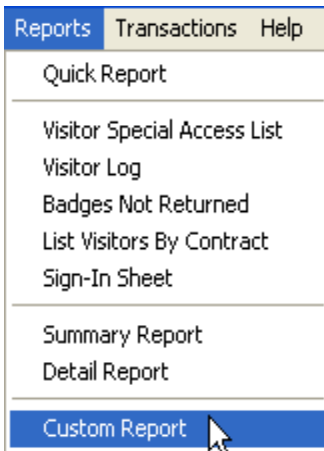
Designer | Script | Preview

## Visitor Badges Report

This example will discuss how to customize the Visitor Badges Report. It will go through the steps in opening and editing the report so that we change the color of the badge.

1. First, you need to go to the module in which you want to edit the report. In this case, we need to go to Visitors. Select the record or group of records that we want to report on. Note: This is helpful because when we select Preview, the report will display the data for the selected group of records.

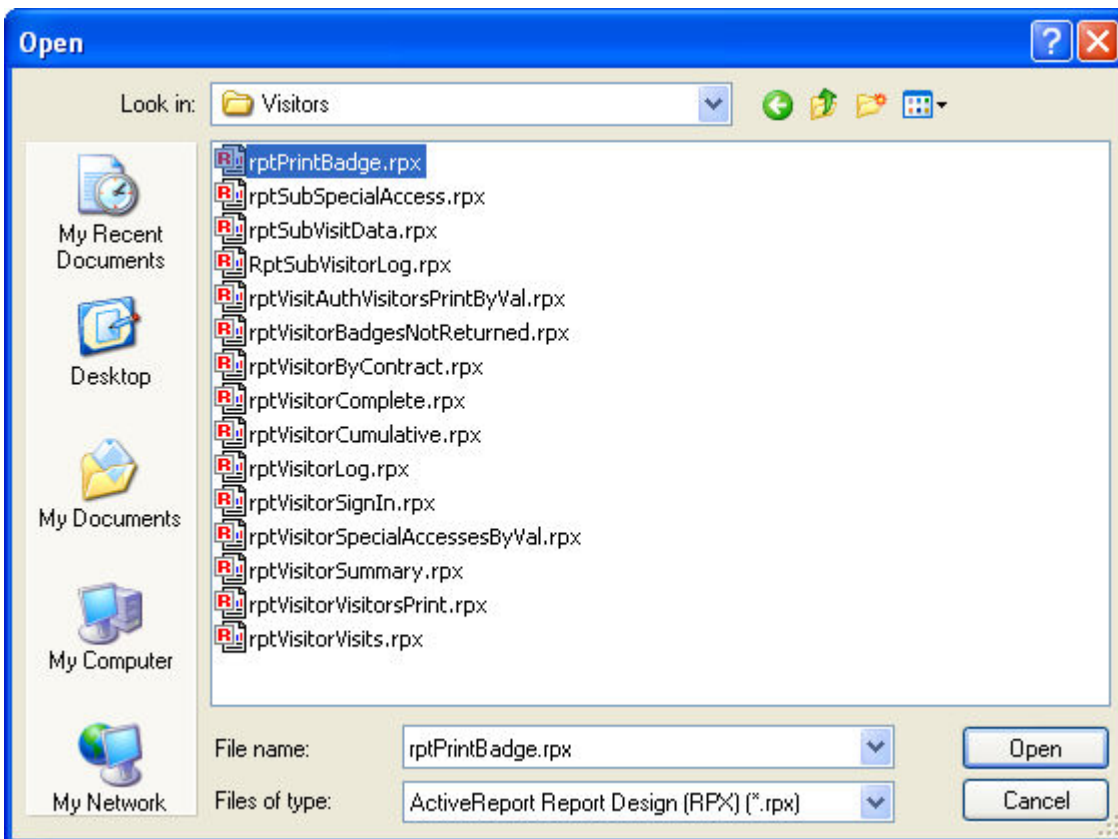
## SIMS Custom Reports



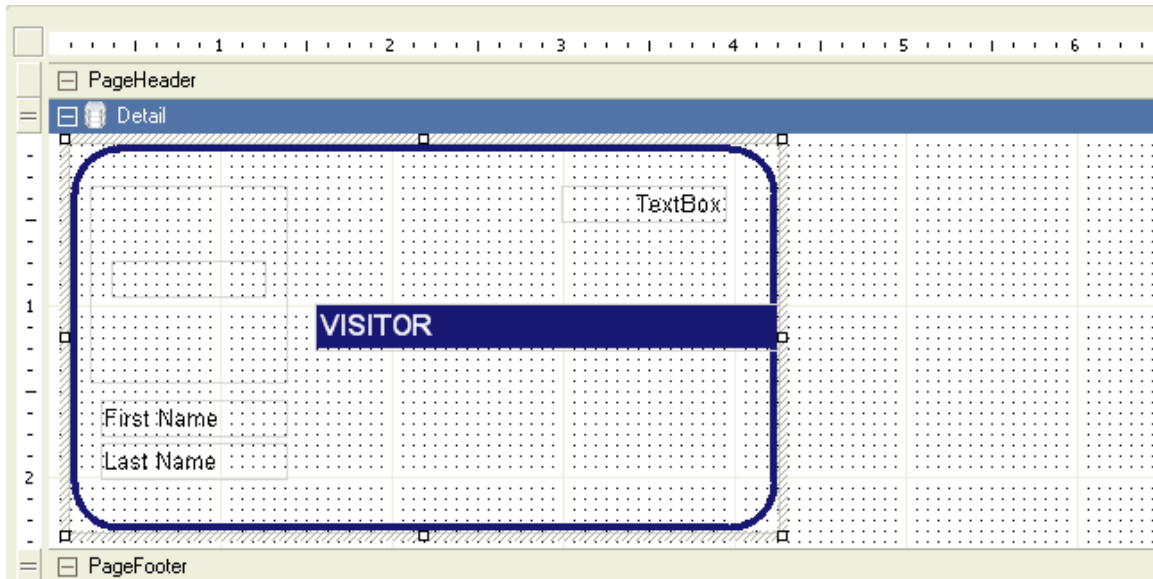
2. The Custom Editor will display. Next, we need to open the report by selecting the Open option under the File menu. The .rpx file can be found under the SIMS install. In this example, SIMS was installed in the default location so the path to the rptPrintBadge.rpx file is:

C:\Program Files\SIMS Software\Client\Modules\Reports\Visitors

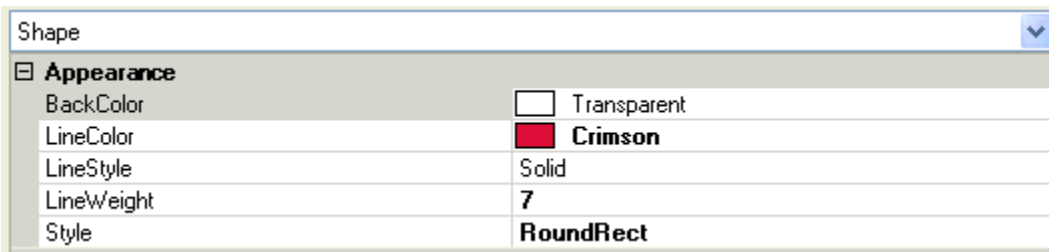
Select the rptPrintBadge.rpx, and then choose the Open Button.



3. The report will display.



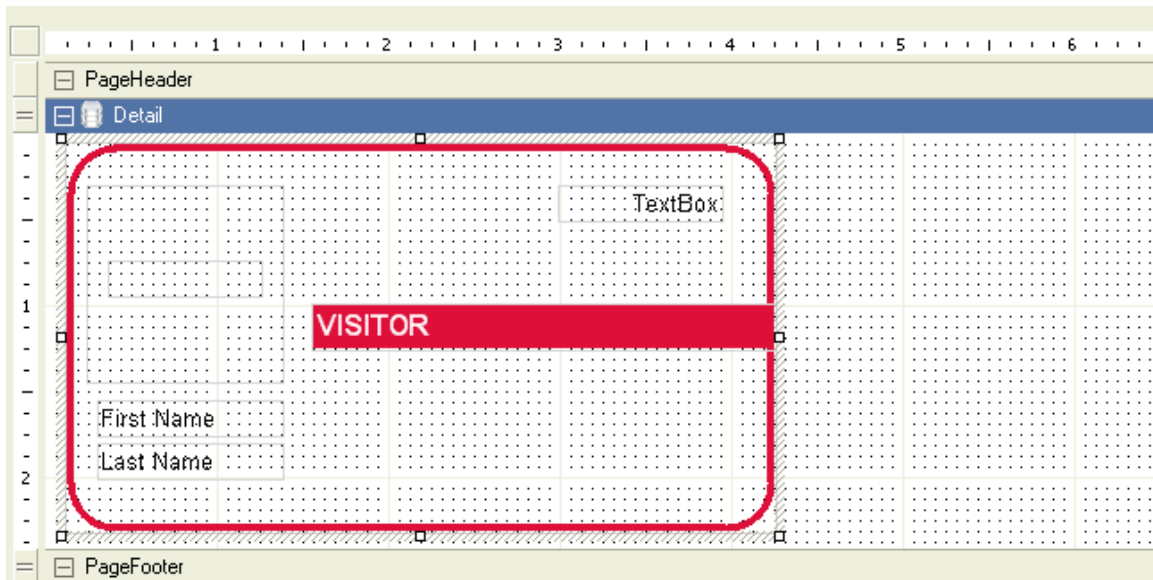
4. To change the color of the badge, select the Shape control and view its Properties. Notice that the LineColor is MidNight Blue. Click on this property and select Crimson.



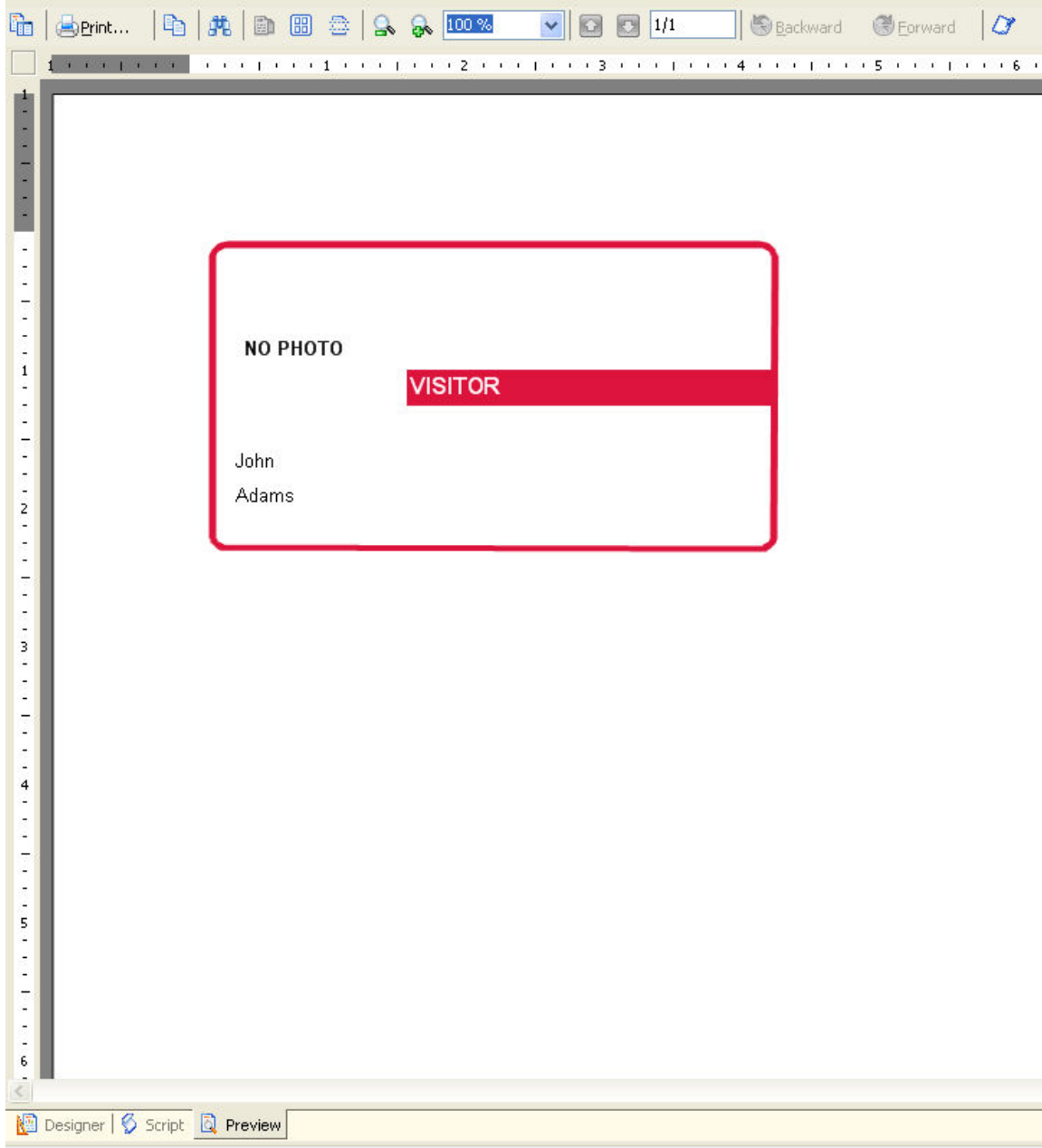
5. To change the color of the Visitor label, select it, and view its Properties. Notice that its BackColor is MidnightBlue. Click on this property and select Crimson.

6. The report should now look like the following.

## SIMS Custom Reports



7. Select the Preview Tab at the bottom of the Design Area, and you can see how the report will display at run-time.



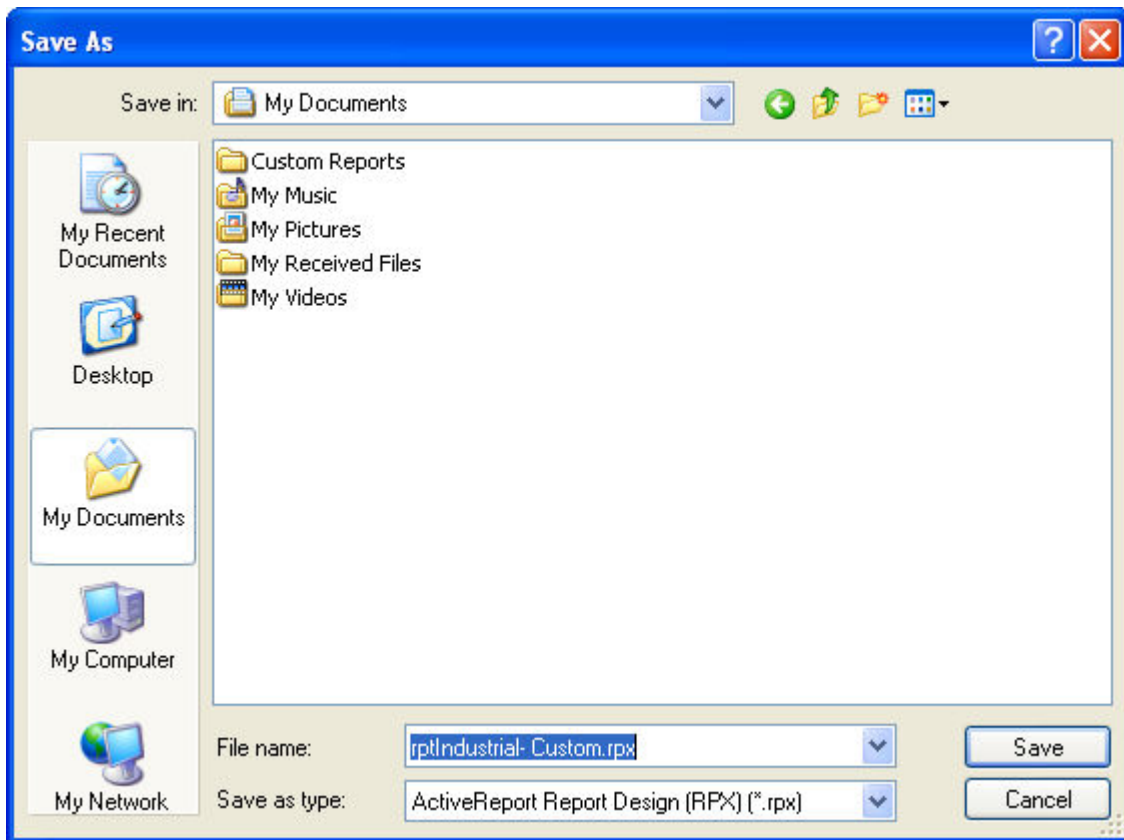
## Using a Custom Report

After modifying a pre-defined report, you may want to save it so that it can be re-used.

1. First, open and edit a pre-defined report. See the examples on editing the Visitor Request and Visitor Badges report.
2. To save the edited report, choose the Save option under the File menu. Save the file in a folder, perhaps called "SIMS Custom Reports" under the \My

## SIMS Custom Reports

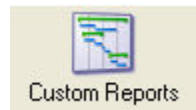
Documents folder. We can use the save the Visit Request report as an example.



2. Next go to the Utilities module within SIMS.



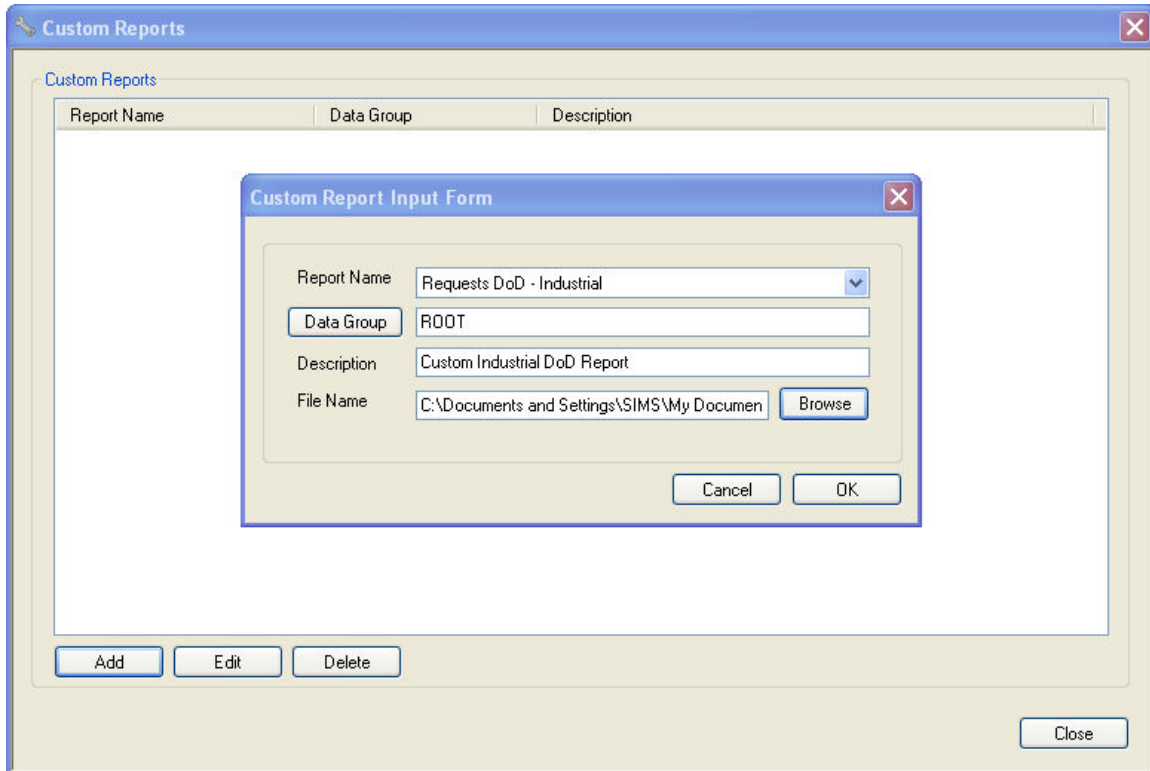
3. Choose Custom Reports and then the Add button.



4. In the case of editing the Industrial Visit Request report, you would select Requests DoD - Industrial from the list.

5. The Data Group will be already filled in with the your Data Group.

6. Enter a description, such as, Custom Industrial DoD Report.
7. Choose on the Browse button, and then locate and select that .rpx file that was just saved in the "Custom Reports" folder.



8. Choose the OK button to save this information.

Now this customized report has been saved in the database and will automatically be used by every SIMS user in this user's Data Group whenever the DoD Industrial report format is selected, when printing a DoD Visit Request.

By keeping a copy of the .rpx file in a "Custom Reports" folder, you now have the ability to make further changes at a later date and then re-save that modified custom report using the Custom Reports utility, without needing to start from scratch.

Note that only one custom report can be saved in the database for each Report Name. If you attempt to add the same Report Name when one was already saved, you will be alerted that a Custom Report for this Report Name and whether or not you want to overwrite it. The only exception to this is the Visitor - Visitor Badges, where multiple custom visitor badges can be saved in the

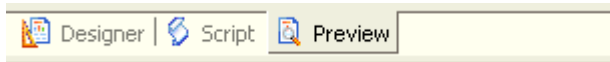
## SIMS Custom Reports

database, each with different Descriptions, so that you can pick from a list of choices when performing a Visitor Check In transaction and printing a badge.

# Previewing a Report

The report can be previewed at any time using the Preview Tab, which is located at the bottom of the Design Area. When you are in the Preview View, you can have an option to print, zoom in, or zoom out of the report.

Before previewing the report, the Outputlist table , should be selected in the Report Explorer's table list that appears on the right. If you select Preview, and the field names are displayed instead of their data, check to see if you have the Outputlist table is selected.









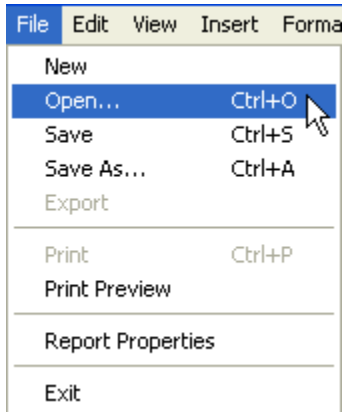
# Opening and Saving a Report

You can choose to open a .rpx file, or save a report as a .rpx file.

## ***Opening a Report***

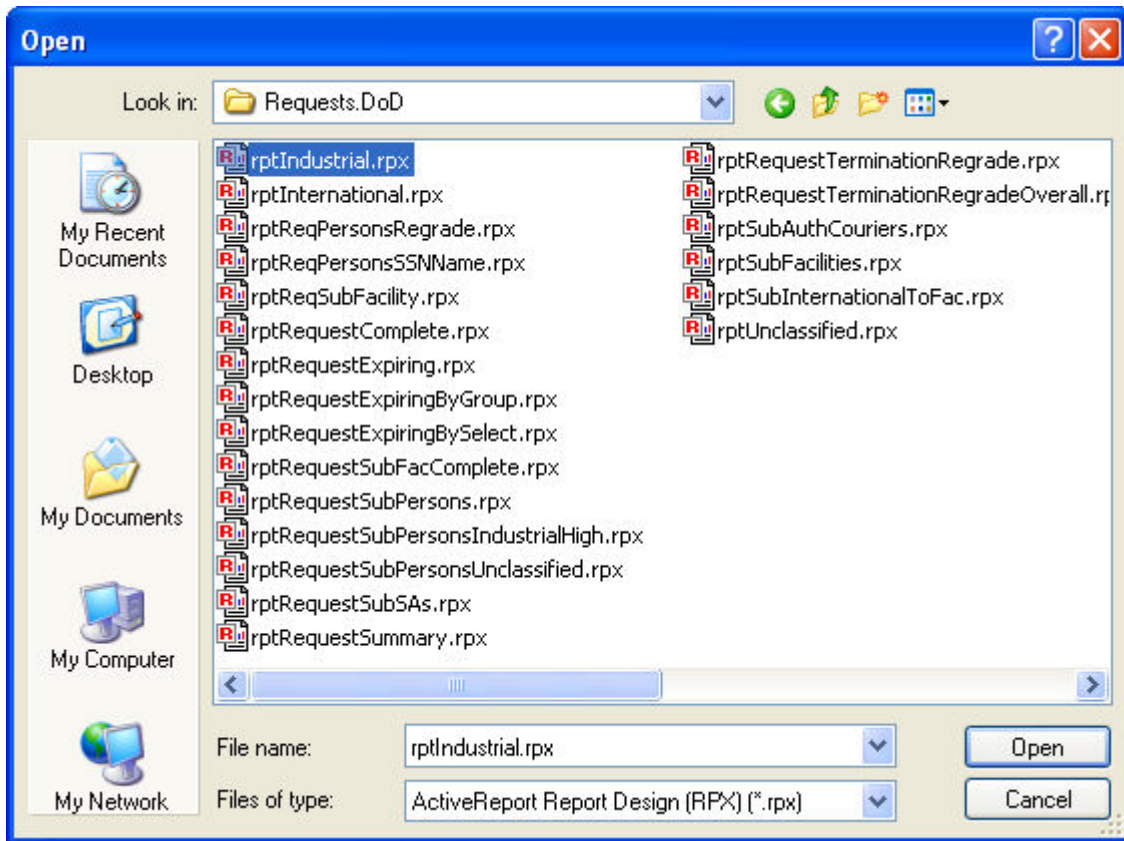
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You can open an existing report by choosing the Open option in the File menu.



You also have the option of selecting the Open icon in the Toolbar.

An Open dialog will appear.



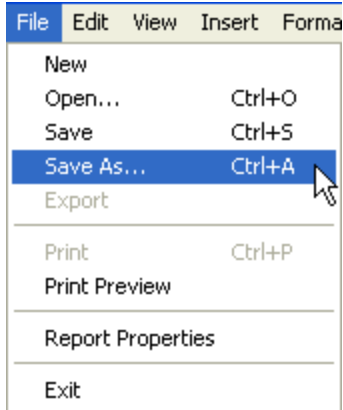
Navigate on the disk, select the .rpx file, and choose the Open Button.

Note: Before opening the report, you should be in the correct module. For instance, if you started out in DoD Requests before selecting Custom Reports from the Reports menu, then the report you are opening should be a DoD report. If you want to open a .rpx file that was created in a different module, you need to exit and go to that module.

See also... [Using a Custom Report.](#)

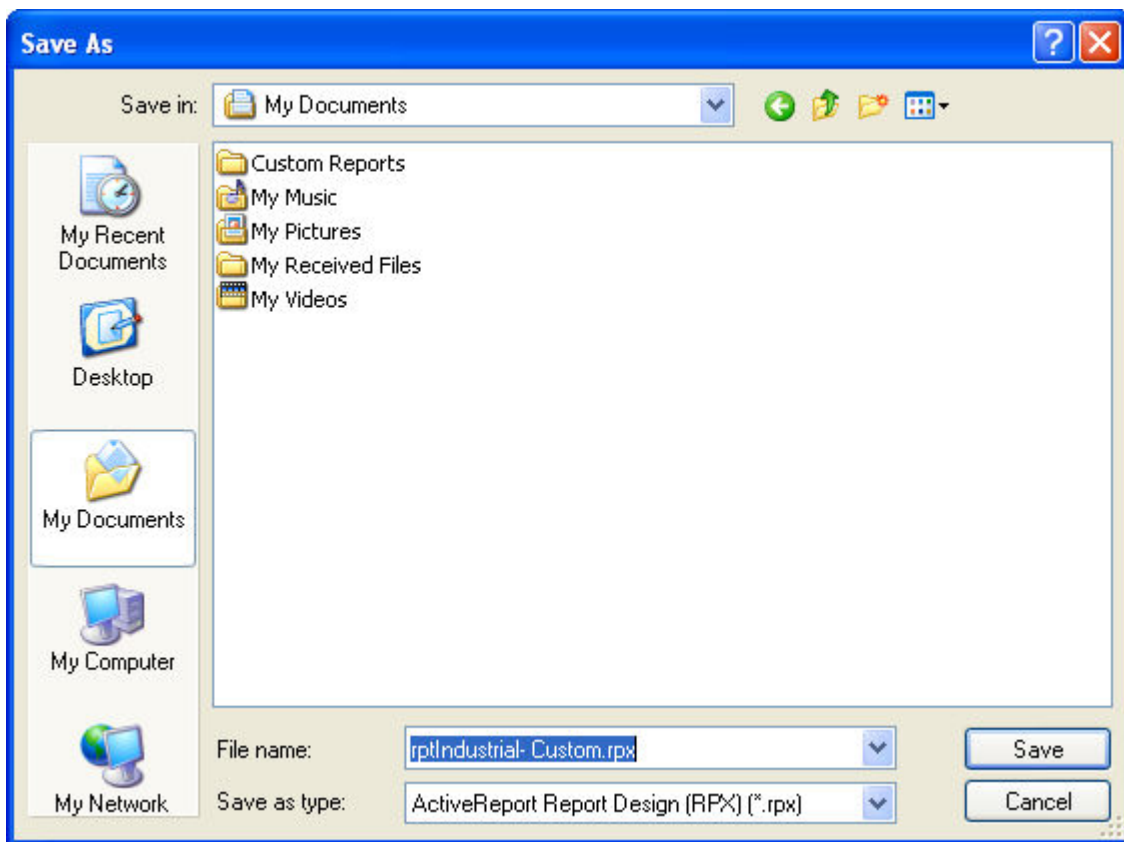
### ***Saving a Report***

You can save the report by choosing the Save or Save As option in the File menu.



You also have the option of selecting the Save or Save As icon in the Tool Bar.

A Save As dialog will appear.



Select the folder in which you want to save the report. Enter a name for the .rpx file and choose the Save Button.

## SIMS Custom Reports

Note: You do not want to overwrite pre-defined SIMS reports. If you are editing a pre-defined report, see the section on Using a Custom Report which will explain how to save a pre-defined report that has been edited.