

Reports Admin – Managing Reports

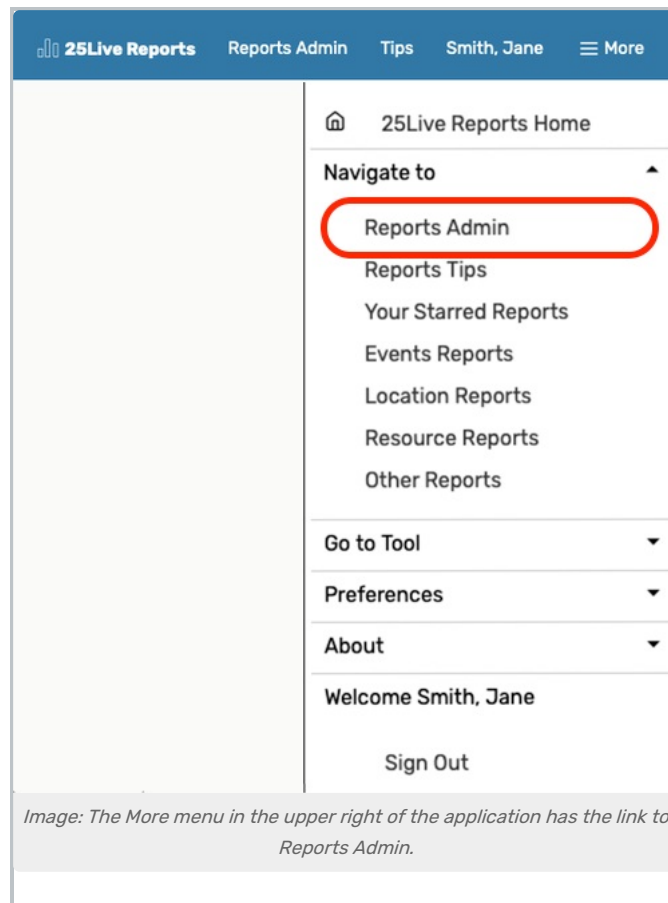
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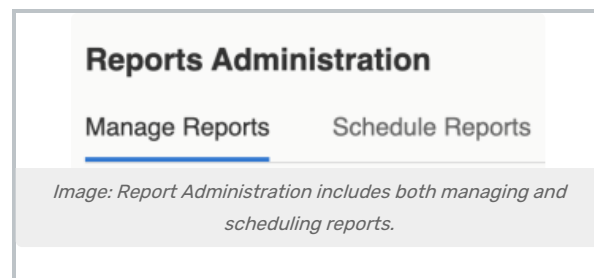
25Live Reports offers an administration area for users to perform report management functions such as:

- Defining custom reports for use in 25Live
- Copying existing standard and custom report definitions as the basis for creating new custom report definitions
- Editing custom report definitions
- Deleting custom reports from 25Live

Getting To Reports Admin



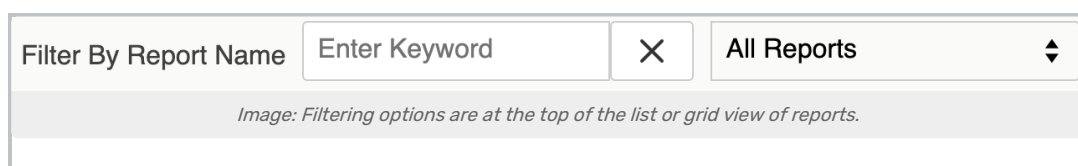
Go to the Reports Administration area in the **More** menu. Use the **Navigate to** link to reveal options, then choose **Report: Admin**. From there, choose whether you wish to manage or [schedule](#) reports.



Viewing Existing Reports

All of your existing reports are shown in pages of results. This includes the standard reports which come with 25Live as well as any custom reports you've defined.

Filtering Your View



Type any keywords found in the title of a report into the **Filter By Report Name** to show only reports that match your keyword.

You can also use the **dropdown menu** to filter reports by their group (event, location, organization, etc) or type (standard or custom).

List View

Viewing 128 of 128 Manage Reports

Grid View

Report Name ↑	Report Group	Report Type	Report Engine	Actions
Academic Term Summary	Events	Standard	Interactive Reports	View Copy
Academic Term Summary - Excel	Events	Standard	WebServices	View Copy
Assignment Policy By Location	Locations	Standard	WebServices	View Copy

Image: The list view is the default on wide displays.

The **List View** is the default view on desktop and wider tablet views. You can tap or click on the column headings to sort the list. The **Actions** column has links to manage each report, including **View** and **Copy** for standard reports and **Edit**, **Copy**, and **Delete** for custom ones.

Viewing a report allows you to see its parameters and other details that make it function in 25Live. You cannot **edit** these details unless the report is a custom one, but they are a useful reference point when defining your own custom reports. You can **copy** both standard and custom reports to pre-fill all these details in a newly defined report instead of starting from scratch as described below.



Tip: Object Security

The object security functionality and ability to determine which groups could run reports are available in [Series25 Group Administration](#).

Grid View

Report Name ↓	Academic Term Summary
Report Group	Events
Report Type	Standard
Report Engine	Interactive Reports
View Copy	
Report Name ↓	Academic Term Summary - Excel
Report Group	Events
Report Type	Standard
Report Engine	WebServices
View Copy	

Image: The grid view is convenient for mobile devices.

Mobile views will use the grid view by default, or you can switch to this view on wider displays using the **Grid View** button at the top of the list.

In this view, information is compacted into labeled blocks. You can tap or click on any bolded label to sort the blocks by that label.

Action links are at the bottom of each block, allowing the same actions described above.

How to Define a New Custom Report

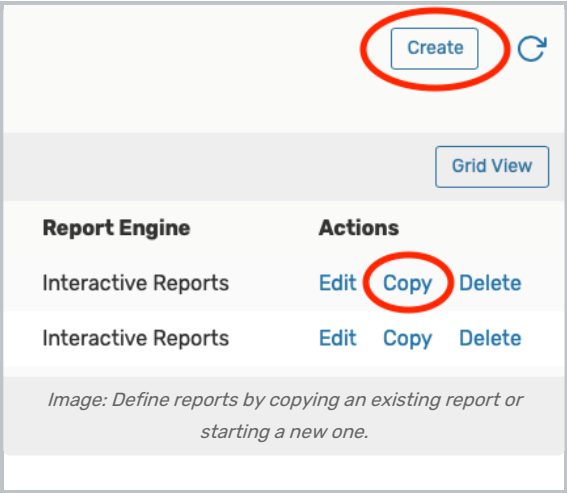


Important Note: First Use the 25Live Interactive Report Designer

In order to add a custom report to 25Live, you must first create and upload the report file. We recommend using the [25Live Interactive Report Designer](#) and following the instructions on that page.

Once you have uploaded this file, you can use it to define a custom report in 25Live Reports using the instructions below.

1. Start a New Report Definition



Click the **Create** button in the top right of the screen to open a window to define a new report.

Clicking **Copy** on an existing report will open the same window but fill out the fields and parameters based on the original, giving you a head start on the next steps.

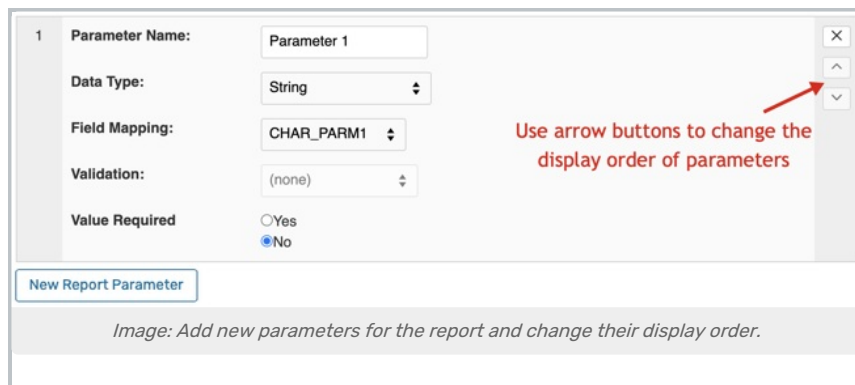
2. Complete Name, Engine, and Group Fields

The screenshot shows the report definition form. It has five fields: 'Report Name' (text input), 'Report Group' (dropdown menu with 'Select a Report Group' as the selected option), 'File Name' (text input), 'Report Engine' (dropdown menu with 'WebServices' as the selected option), and 'Report Type' (text input with 'Custom' as the value). Below the fields, there is a note: 'Image: Fill out all fields to define a new report.'

Define the report by giving it a **Name** and choosing which **Report Group** it will appear in. Users will see these fields when [running the report](#).

You must also enter the **File Name** of the file uploaded to the report server and select the **Report Engine** (WebServices or Interactive Reports) corresponding to that file. Include the extension (.xls for WebServices and .cls for Interactive Reports) in the filename.

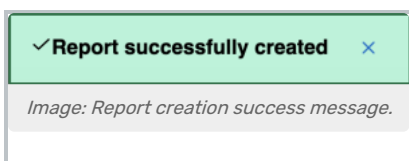
3. Add Report Parameters



For each input parameter specified in the custom report file, you must define a **Parameter** for the report in 25Live. Users will select values for these parameters when running the report.

1. Click **New Report Parameter**.
2. Enter the parameter **Name** as you want it to appear to a user.
3. Choose the parameter's **Data Type** from the drop-down list. (See below for an explanation of data types.)
4. 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.
5. If you chose "Object" as the parameter's data type, choose the object type from the **Validation** drop-down list.
6. If the user must enter a value to run the report, select "Yes" for **Value Required**.
7. Repeat these steps to define additional parameters.
8. Use the up and down arrows to set the order that parameters will appear when a user runs the report.

4. Save the Report



Click **Save Report** to add the report definition to 25Live. You will see a green success message in the bottom of the screen.

5. Define Report Security (Optional)

A newly created report will use the [default object security](#) settings to determine who is allowed to run it. To edit these permissions for an individual report, change its security settings in the [Series25 Group Administration Help](#).

Deleting a Report

The standard reports which come with 25Live cannot be deleted, but you can remove any custom report from 25Live by clicking the **Delete** link next to its name.

Deleting a report definition in 25Live does not remove any files uploaded to the custom report server. You can create a new report definition using the same file.

To hide a report from users without deleting it (such as you might wish to do with a standard report), change its security settings in the [Series25 Group Administration](#) tool.

Data Types for Report Parameters

Most reports in 25Live use parameters so that users can narrow down what is included in the results. For example, users may need to supply a date range, a number, or a saved search as a parameter.

When defining a custom report, you must choose the data type of each parameter. This should correspond to the data type of the variable used in the report file.

Most parameters are commonly marked as required fields, but sometimes (depending on the report and the variable) this is not necessary.

If a parameter's type is...	The user generating the report must...
String	Enter alphanumeric text (maximum 80 characters)
Integer	Enter a whole number
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
Search	Select an existing event, location, organization, or resource search
Object	Select an organization, contact, requirement type, or organization type
Group by	Group sections of the report by one of the available categories
Standard Patterns	Select a defined meeting pattern