25Live Custom Report Integration

Custom report integration functions of the 25Live Administration Utility

The 25Live Administration Utility can be used to integrate custom reports created by your institution into the 25Live environment. The Utility allows authorized 25Live users to perform the following custom report integration functions:

- Define custom reports and add them to the 25Live environment
- Copy existing standard and custom report definitions as the basis for creating new custom report definitions
- Edit custom report definitions
- Delete custom reports from the 25Live environment

For information on creating Custom Reports using Series25 WebServices, view this video tutorial available from Series25 Customer Resources:


The 25Live Administration Utility is also used to:

- Define 25Live data. For information, see the 25Live Data Administration Guide available by clicking Help and choosing “Data Administration.”
- Set up and manage 25Live security. For information, see the 25Live Security Administration Guide available by clicking Help and choosing “Security Administration.”
- Set up and manage 25Live event pricing. For information see the 25Live Event Pricing Guide available by clicking Help and choosing “Event Pricing.”
Adding and deleting custom reports in the 25Live environment

Manage Reports task tab
The Manage Reports task tab of the 25Live Administration Utility allows authorized users to:
- Define new custom reports and add them to the 25Live environment
- Edit the definitions of custom reports that have previously been added to the 25Live environment
- Delete reports from the 25Live environment

Defining custom reports and adding them to the 25Live environment

Add Report page
The Add Report page lets you define new custom reports from scratch and add them to the 25Live environment.
Report parameters

If you want 25Live users to specify relevant values for report generation to filter records or create a subset of data, you need to define the parameters of your custom report on the Add Report page. For example, you may want the user to supply a date range, an object, or a search as a parameter.

If you specify a search parameter, only the objects selected in the search are processed in generating the report.

If you specify an object parameter (organization, contact, requirement type, or organization type), 25Live performs error checking on the value entered for the parameter in generating the report to ensure that an existing internal identifier matches the user’s entry.

To help ensure predictable report results, it is recommended that you require a value for each of your report parameters. If you don’t, the generated report may not include all the expected data or, in some cases, any data.

You must choose the data type of each parameter you define.

<table>
<thead>
<tr>
<th>If you choose...</th>
<th>The user generating the report must...</th>
</tr>
</thead>
<tbody>
<tr>
<td>String</td>
<td>Enter alphanumeric text (maximum 80 characters)</td>
</tr>
<tr>
<td>Integer</td>
<td>Enter a whole number</td>
</tr>
<tr>
<td>Float</td>
<td>Enter a number that may include a decimal</td>
</tr>
<tr>
<td>Date</td>
<td>Enter a date</td>
</tr>
<tr>
<td>Time</td>
<td>Enter a time</td>
</tr>
<tr>
<td>Date/Time</td>
<td>Enter a date and time</td>
</tr>
<tr>
<td>Duration</td>
<td>Enter a time duration (days/hours/minutes)</td>
</tr>
<tr>
<td>Boolean</td>
<td>Select Yes or No</td>
</tr>
<tr>
<td>Event Search</td>
<td>Select the name of an existing event search</td>
</tr>
<tr>
<td>Organization Search</td>
<td>Select the name of an existing organization search</td>
</tr>
</tbody>
</table>
To define and add a custom report from scratch

1. Click the Reports tab, then click the Manage Reports task tab.
2. Click ADD to go to the Add Report page.
3. Enter the name of the report as you want users to see it in 25Live.
4. Choose the appropriate Report Group for the report from the drop-down list.
5. In the Filename field, enter the name of the .xsl file you created for the report and placed in the ASV custom reports directory.
6. Define report parameters as needed. Enter the parameters in the order you want them presented to users generating the report. To define a parameter:
   b. Enter the parameter name as you want it to appear to 25Live users when they are specifying parameters for the report.
   c. Choose the parameter’s data type from the drop-down list.
   d. 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.
   e. If you chose “Object” as the parameter’s data type in step c, choose the object type from the Validation drop-down list.
   f. If the user must enter a value for the parameter, select “Yes” for Value Required.
   g. Repeat steps a - f to define additional parameters.
7. Click Add Report.
Add Report via Copy page

Rather than starting from scratch to define a new custom report, you can use the Add Report via Copy page to copy the report definition of an existing standard or custom report as the basis for defining a new custom report, and then add the new report to the 25Live environment.

To copy a report definition and add a custom report

1. Click the Reports tab, then click the Manage Reports task tab.
2. Click COPY.
3. Find the report you want to copy, highlight it, and click Copy.
4. On the Add Report via Copy page, enter the name of the new report as you want users to see it in 25Live.
5. Choose the appropriate Report Group for the report from the drop-down list.
6. In the Filename field, enter the name of the .xsl file you created for the report and placed in the ASV custom reports directory.
7. Modify the report parameters as needed.

<table>
<thead>
<tr>
<th>To...</th>
<th>Do this...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add a new parameter</td>
<td>Follow step 6 on page 4.</td>
</tr>
<tr>
<td>Modify a parameter</td>
<td>Change the parameter fields as needed. See “Report parameters” on page 3 and step 6 on page 4 for guidance.</td>
</tr>
<tr>
<td>Remove a parameter</td>
<td>Click its Remove (red X) icon.</td>
</tr>
<tr>
<td>Change the presentation order</td>
<td>Use the up and down arrows to move the parameter up or down in order.</td>
</tr>
<tr>
<td>of a parameter</td>
<td></td>
</tr>
</tbody>
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Editing custom report definitions

Edit Reports page

The Edit Reports page lets you edit the definitions of custom reports that have been previously added to the 25Live environment. You can’t edit the definitions of standard reports, although you can copy them as the basis for defining new custom reports.

To edit the definition of a custom report

1. Click the Reports tab, then click the Manage Reports task tab.
2. Click EDIT.
3. Find the custom report you want to edit, highlight it, and click Edit.
4. On the Edit Reports page, modify the report name, report group, and/or filename as needed.
5. Modify the report parameters as needed.

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6. Click Save Changes.
Deleting custom reports from the 25Live environment

Delete Report page
The Delete Report page lets you delete custom reports from the 25Live environment.

To delete a custom report
1. Click the Reports tab, then click the Manage Reports task tab.
2. Click DELETE.
3. Find the custom report you want to delete, highlight it, and click Delete.
4. Click Delete Report to confirm.