

VetraSpec Custom Report Guide



Creating a Custom Report

1. Click the **Reports** link.

2. Click the **Create a Custom Report** link.

3. Select the **Report base**.
4. If desired enter a value in the **Report name** field. The name would display as the title of the report when generated and would be displayed as the name of the report in the Custom Report section under the Reports tab.
5. Select the number of **Items per page** to display.



Properties

Report base: Veteran ▾

Report name:

Items per page: 50

Columns

Veteran ▾

Inner Join ? Left Join ?

Filters

Veteran ▾

Match all ? Match any ?

Sort

Veteran ▾

Run/Preview Report Save Custom Report

6. Select the desired column(s) for the report. The first field is for the tab and the second is for the desired field on that tab.

SELECTING INNER JOIN REQUIRES VALUES FOR ALL CHILD OBJECTS. E.G. IF YOU SELECT "VETERAN" AND "FORM" ONLY VETERANS WITH FORMS WILL BE SHOWN.

SELECTING LEFT JOIN DOES NOT REQUIRE VALUES FOR ALL CHILD OBJECTS. E.G. IF YOU SELECT "VETERAN" AND "FORM" VETERANS WILL BE SHOWN REGARDLESS OF IF THEY HAVE ANY FORMS.

Properties

Report base: Veteran ▾

Report name:

Items per page: 50

Columns

Veteran ▾

Inner Join ? Left Join ?

Filters

Veteran ▾

Match all ? Match any ?

Sort

Veteran ▾

Run/Preview Report Save Custom Report



7. Select the desired filter(s) for the report. The first field is for the tab and the second is for the desired field. The report will filter based on the filter(s) selected. For example if you select to filter where Deceased = 1 then only deceased veterans will return.

The screenshot shows a report configuration interface with the following sections:

- Properties:** Report base: Veteran (dropdown), Report name: (text input), Items per page: 50 (text input).
- Columns:** Veteran (dropdown), (dropdown), Inner Join (with help icon), Left Join (with help icon).
- Filters:** (highlighted with a red arrow), Veteran (dropdown), (dropdown), Match all (with help icon), Match any (with help icon).
- Sort:** Veteran (dropdown), (dropdown).

Buttons at the bottom: Run/Preview Report, Save Custom Report.

8. Select the desired sort order.

For sorting by multiple columns: it sorts by each column in turn. For example, if the first sort column is "Last Name" and the second is "First Name" it would sort like the following:

- Benjamin Franklin
- George Franklin
- Benjamin Washington
- George Washington



Properties

Report base: Veteran ▾

Report name:

Items per page: 50

Columns


Veteran ▾

Inner Join ? Left Join ?

Filters

Veteran ▾

Match all ? Match any ?

Sort 

Veteran ▾

9. Click **Run/Preview Report** to view the report.

Properties

Report base: Veteran ▾

Report name:

Items per page: 50

Columns

Veteran ▾

Inner Join ? Left Join ?


Filters

Veteran ▾

Match all ? Match any ?

Sort

Veteran ▾



The report will display.

TOTAL: 69	LAST NAME	FIRST NAME	DECEASED?
	Rogers	Shaggy	No
	Duck	Donald	Yes
	KATSON	KAT	No
	Ellis	Tamara	No
	Moore	Janet	No
	Lee	Ralph	No
	Gray	Jesse	No
	Foster	Pauline	No
	Froeman	Russell	No
	Anderson	Greg	No
	Denise	George	No
	Terrence	Montgomery	No
	Allen	Hector	No
	Mitchell	Andrea	No
	Andrews	Kathleen	No
	Armstrong	Alfredo	No
	Arnold	Frank	No
	Bishop	Eric	No



Saved Reports

1. To save the report to run at a different time click the **Save Custom Report** button.

The screenshot shows a configuration form for a report. It is divided into several sections: Properties, Columns, Filters, and Sort. At the bottom, there are two buttons: 'Run/Preview Report' and 'Save Custom Report'. A red arrow points to the 'Save Custom Report' button.

Properties
Report base: Veteran ▾
Report name:
Items per page: 50

Columns
Veteran ▾
 Inner Join ? Left Join ?

Filters
Veteran ▾
 Match all ? Match any ?

Sort
Veteran ▾

Run/Preview Report Save Custom Report

2. From the **Report** page click on the name of a saved report to generate it.

The screenshot shows a grid of report categories. A red arrow points to the 'Test Custom Report (Edit)' link in the 'CUSTOM REPORTS' section.

DIAGNOSTIC CODES - PENDING ISSUES	MISCELLANEOUS	DEATH AND BURIAL
Diagnostic code keyword (by keyword, pending and closed issues)	Veterans by city Veterans by ZIP Code Veterans by county/office Veterans by county of residence Mailing list for Excel (WARNING: STATE users get ALL vets in the entire state!) Deceased Veterans for Excel (WARNING: STATE users get ALL vets in the entire state!) E-mail list for Excel (WARNING: STATE users get ALL vets in the entire state!)	Deceased Veterans by Office Veterans by cause of death Veterans by cemetery Deceased Vet Claimants/Dependents
POA & FORMS	CUSTOM REPORTS	
21-527, 21-526, 21-534 by date New POA's by date POA received All forms by date County users will get the total for their county only. State users will see a total for the entire state	(Edit) Test Custom Report (Edit) (Create a custom report)	

If **Expose as parameter** was selected when the report was created then a user will have the option to edit the before running the report.

The screenshot shows the 'Filters' section of the report configuration. It includes two filter rows and a 'Match all' radio button. The 'Expose as parameter' checkbox is checked.

Filters
Veteran ▾ Date Record Added ▾ = ▾ mm/dd/yyyy Expose as parameter
Veteran ▾
 Match all ? Match any ?



CUSTOM REPORTS

Date Record Added

3. Once a saved report has been generated it is possible to download it for Excel.

[Download this report for Excel](#) 

LAST NAME	FIRST NAME	DECEASED?
Rogers	Shaggy	No
Duck	Donald	Yes
KATSON	KAT	No
Ellis	Tamara	No
Moore	Janet	No
Lee	Ralph	No
Gray	Jesse	No
Foster	Pauline	No
Freeman	Russell	No
Anderson	Greg	No
Denise	George	No
Terrence	Montgomery	No
Allen	Hector	No
Mitchell	Andrea	No
Andrews	Kenneth	No
Armstrong	Alfredo	No
Arnold	Frank	No
Bishop	Eric	No
Brooks	Jerry	No
Caldwell	Eddie	No
Campbell	Debbie	No
Barrett	Chad	No
Cole	Kyle	No

