

Chained Reports

Chained Reports comprise multiple existing reports which are executed in a specific order and compiled into a single document. They are a simplified method for managing reports en masse.

Note: Chained Reports can only be executed as Excel, PDF, RTF, or CSV. HTML-only features are not supported in chained reports.

Note: Chained Reports do not support Excel templates. Additionally, all reports in a chained report must have a common RTF template (or lack thereof).

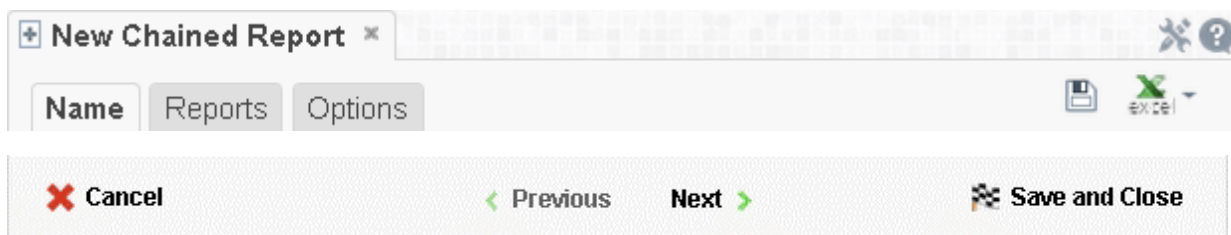
Note: The Exago Scheduler does not support Chained Reports.

Chained Report Wizard

The Chained Report Wizard is an interactive tool which allows you to create and edit Chained Reports.

To navigate the wizard either click the desired tab or use the buttons at the bottom.

To save a Chained Report click the save button.



The Chained Report Wizard has three sub tabs. The Name and Reports tabs must be completed.

Name Tab

In the Name tab enter a report name and click on the Folder where the report will be saved.

The report name can be up to 255 characters. Avoid special characters such as ? : / \ * " < > .

The report's description appears at the bottom of the Main Menu when it is selected. The description text is also used when searching for a report.

Note: You cannot create a report inside a folder that is read-only (🔒).

New Chained Report ✕

Name Reports Options

Enter the report name

Select folder for the report

- ▶ Financial Holdings Reports
- ▶ Retail Customers Reports
- ▶ Sales Reports
- ▶ Seasonal Reports
- ▶ University Student Reports
- ▶ Wholesale Customer Reports

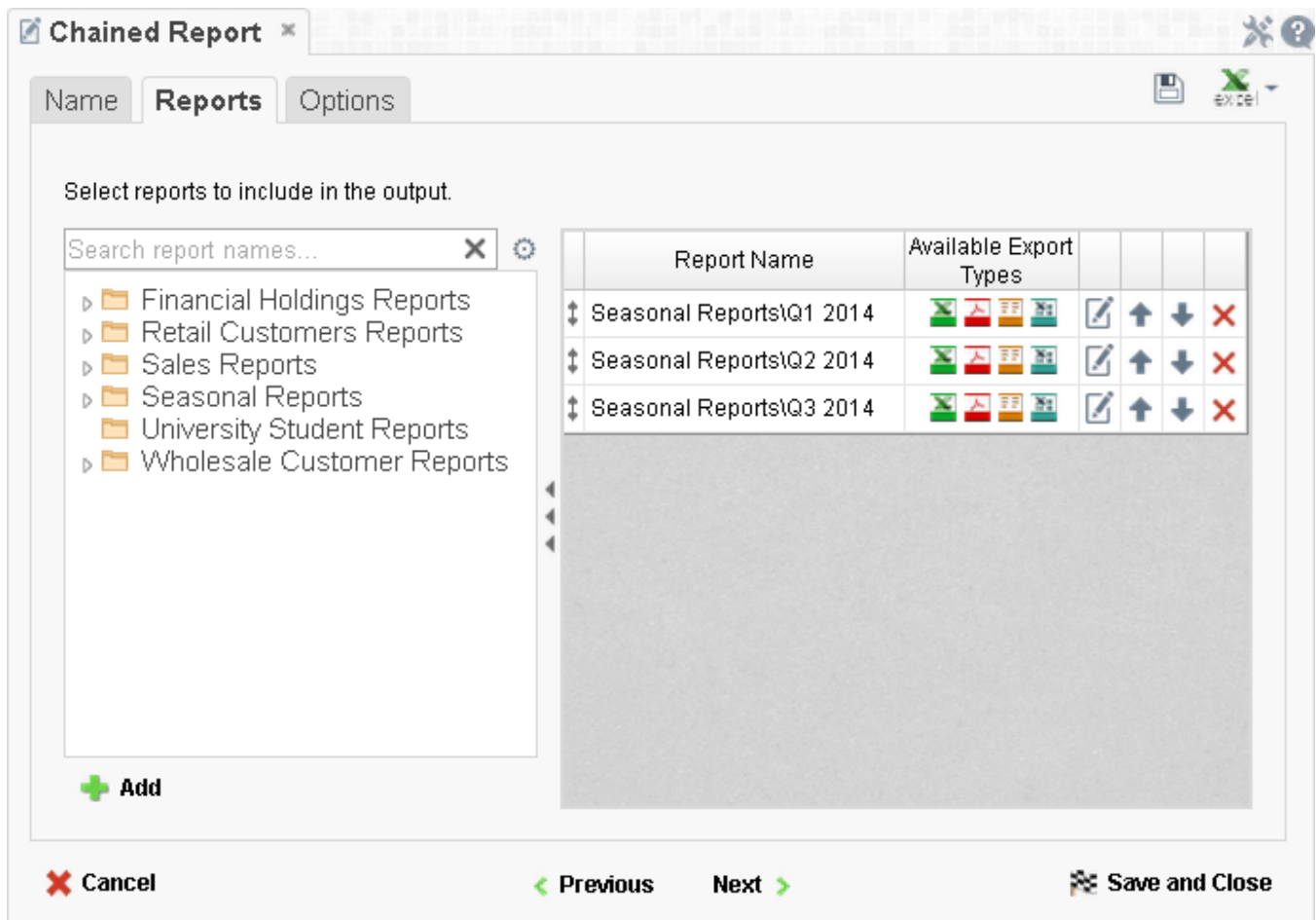
Enter a description for the report

✕ Cancel < Previous Next > Save and Close

Reports Tab

In the Reports tab select the reports you wish to include in the Chained Report.

Note: You can only include Standard Reports, Express Reports, and CrossTab reports in a Chained Report.



- To add a report either drag and drop it to the 'Report Name' Column, use the 'Add' button or double-click it.
- To search for a specific report, enter the terms that you want to search for in the search box. To see all the reports click the Clear button (X).
- A report may be able to export only in certain formats. Available formats for each report are listed under Available Export Types. A Chained Report which contains a format restriction on one of its reports cannot execute in that format.
- If a report has Prompt for Value filters or parameters, click the 'Edit Report Options' button ([Edit]) to access the Report Properties menu, where you can specify how to prompt for these filter values:
 - **Common Prompt** – When the Chained Report executes, you will be prompted for a value that is used by all of the reports on the Chained Report that have filter prompts on this Data Field.
 - **Report Prompt** – When the Chained Report executes you will be prompted for a value to filter this specific report.

- **Assign Value** – Assign the filter a specific value. This filter will not prompt when the Chained Report executes.
- Use the up and down arrows to indicate the order of the reports.
- To remove a report click the delete button (✖).

Options Tab

The Options tab allows you to control various report option settings for the chained report.

The screenshot shows a dialog box titled "New Chained Report" with three tabs: "Name", "Reports", and "Options". The "Options" tab is selected. Inside the "Options" tab, there is a section titled "General Export Options" which contains the following settings:

- Default Export Type: Default (dropdown menu)
- Allowed Export Types: Excel PDF RTF CSV
- No Data Qualified Action: Show Placeholder (dropdown menu)

At the bottom of the dialog, there are four buttons: "Cancel" (with a red X icon), "Previous" (with a left arrow icon), "Next" (with a right arrow icon), and "Save and Close" (with a checkmark icon).

General Export Options

- Use the 'Default Export Type' menu to specify the default format for the report.
- Output types may be disabled by unchecking the boxes for 'Allowed Export Types'.
- Use the 'No Data Qualified Action' menu to select what to display if no data qualifies for a report.
 - **Skip Report** – Display the next qualified report.
 - **Show Placeholder** – Show a placeholder message in place of the report.