



United States Army Corps of Engineers- ERDC/CERL

BUILDER Custom Reports – Core Set

For: BUILDER Partners. Includes the Core set of Custom Reports (Final, Inspection Locks, Quality Assurance, and Quality Control) plus the BUILDER Catalog. **PRELIMINARY RELEASE**

6/28/2016

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1. List of BUILDER Custom Reports – Core Set Plus the BUILDER Catalog

Part I: Introduction to BUILDER Custom Reports – Core Set Plus the BUILDER Catalog

Introductory Information

What is the core set of BUILDER Custom Reports?




In contrast to the BUILDER Standard Reports, which are built into the code of the BUILDER Sustainment Management System (SMS) application, the **BUILDER Custom Reports** are developed outside of the BUILDER SMS code. They are deployed from a report server separate from BUILDER. These reports are therefore easier to modify; they are designed to expand the reporting capability beyond what is provided in the BUILDER Standard Reports.

There is a **core set** of Custom Reports that were designed and developed by the BUILDER design team. These reports are named “Final”, “Inspection Locks”, “QC”, and “QA”. The Custom Reports are intended to help the user during their data quality assurance phase a means to review the data at the various levels of the BUILDER hierarchy. This core set of reports is generally deployed to all BUILDER instances.

This documentation also describes the BUILDER Catalog report, which lists all available Section designations that can be selected via BUILDER menus during inventory.

How are Custom Reports accessed?

In BUILDER, Custom Reports are accessed from the toolbar above the content pane (Figure 1).

Note: With the exception of the BUILDER Catalog, which is available only at the Organization () level, the core set of Custom Reports are available only at the Site () and Complex () levels of the BUILDER hierarchy. Further narrowing of scope may be achieved by using filters.

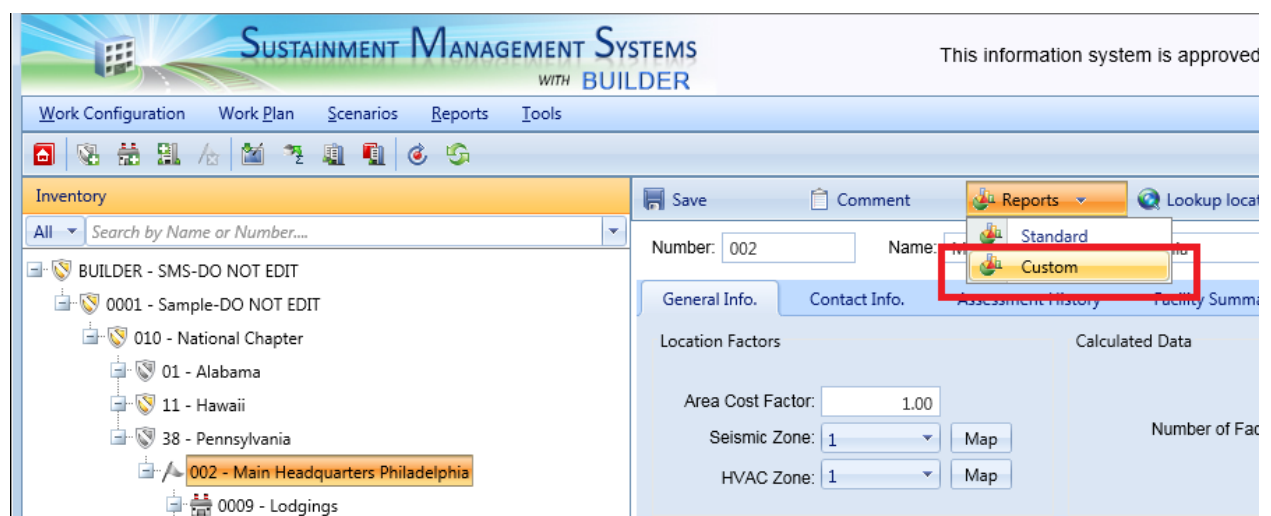


Figure 1: Location of Custom Reports in BUILDER 3.3.7. This example shows the Site level being selected; thus only Custom Site level reports will render.

The Custom Reports menus that appear after clicking Custom (see red box, Figure 1) will differ depending upon what hierarchy level in BUILDER a report is launched from. That is, if a user has selected a Site within the BUILDER Inventory hierarchy tree and from there chooses the Custom Reports menu, then the drop-down menu—or, depending on which version of BUILDER is being utilized, the drop-down menu available in the “Custom Reports” popup

window (see Figure 2)—will display a list of Site-level reports. This drop-down menu may offer different choices if a user has selected Custom Reports from a different hierarchical level.

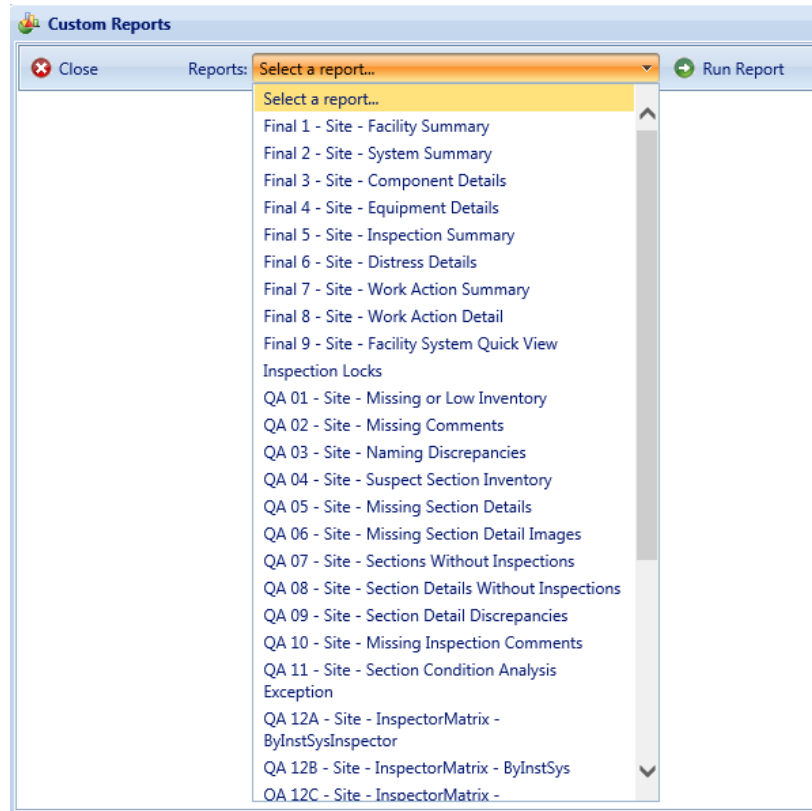



Figure 2: List of Custom Reports. This example shows Custom Reports available at the Site level.


To launch the report after selecting it from the list, activate the  button. In Internet Explorer, you will also need to make another selection in order to Open the report.

How are Custom Reports created?

When a custom report is launched from the drop-down menu, BUILDER will send a “key” to the report at run-time and the report will be filtered using that key. For example, when a Site-level report is chosen, then BUILDER will send the Site key to the report and the report will be filtered to deliver results for that Site only. The same goes for reports at the Organization or Complex level: a key will be passed to the report to act as a filter, and the report will deliver results for that single Organization or Complex that was chosen at run time.

There may be other filters inherent in the report. Unless otherwise noted in the description of the Custom Report, the output will not be filtered other than using the run-time filter of Organization, Site, or Complex discussed in the previous paragraph. Each report description will indicate whether the report has filters, and if so how the report is filtered. If the description indicates no filter, then only the run-time parameter filter will apply.

How are Custom Reports exported?

Some reports are designed to be printable and **exportable to PDF** for printing or distributing. Other reports are tabular in nature and are designed to be **exportable to EXCEL**. See the table below to see which type of output the report is tailored to. After generating (“running”) the report, select the **Save** icon () and **choose** that output type from the options given.

List of BUILDER Custom Reports – Core Set Plus the BUILDER Catalog

Report Name	BUILDER-LEVEL				Formatted for export to:	See Page for Details.
	ORG	SITE	CPLX	BLDG		
BUILDER CATALOG						
BUILDER Catalog	X				PDF	10
FINAL REPORTS						
Final 1 - Facility Summary	X	X	X		EXCEL	11
Final 2 - System Summary	X	X	X		EXCEL	12
Final 3 - Component Details	X	X	X		EXCEL	13
Final 4 - Equipment Details	X	X	X		EXCEL	14
Final 5 - Inspection Summary	X	X	X		EXCEL	15
Final 6 - Distress Details	X	X	X		EXCEL	16
Final 7 - Work Action Summary	X	X	X		EXCEL	17
Final 8 - Work Action Detail	X	X	X		EXCEL	18
Final 9 - Facility System Quick View	X	X	X		EXCEL	19
INSPECTION LOCKS REPORT						
Inspection Locks		X	X		EXCEL	20
QUALITY ASSURANCE REPORTS						
QA 01 - Missing or Low Inventory		X	X		EXCEL	21
QA 02 - Missing Comments		X	X		EXCEL	22
QA 03 - Naming Discrepancies		X	X		EXCEL	23
QA 04 - Suspect Section Inventory		X	X		EXCEL	24
QA 05 - Missing Section Details		X	X		EXCEL	25
QA 06 - Missing Section Detail Images		X	X		EXCEL	26
QA 07 - Sections Without Inspections		X	X		EXCEL	27
QA 08 - Section Details Without Inspections		X	X		EXCEL	28
QA 09 - Section Detail Discrepancies		X	X		EXCEL	29
QA 10 - Missing Inspection Comments		X	X		EXCEL	30
QA 11 - Section Condition Analysis Exception		X	X		EXCEL	31
QA 12A - InspectorMatrix - ByInstSysInspector		X	X		PDF	32
QA 12B - InspectorMatrix - ByInstSys		X	X		PDF	33
QA 12C - InspectorMatrix - ByInstInspectorSys		X	X		PDF	34
QA 12D - InspectorMatrix - ByInspector		X	X		PDF	35
QA 12E - InspectorMatrix - GRAPH - ByInstSys		X	X		PDF	36

Report Name	BUILDER-LEVEL				Formatted for export to:	See Page for Details
	ORG	SITE	CPLX	BLDG		
QUALITY CONTROL REPORTS						
QC 1 - Facilities Report		X	X		EXCEL	37
QC 2 - Systems Report		X	X		EXCEL	38
QC 3 - Components Report		X	X		EXCEL	39
QC 4 - Component-Sections		X	X		EXCEL	40
QC 5 - Section Details		X	X		EXCEL	41
QC 6 - Inspection Report		X	X		EXCEL	42

Description of BUILDER Custom Reports

The pages below contain descriptions of each of the reports included in the BUILDER Custom Reports core set, plus the BUILDER Catalog.

The descriptions summarize the makeup of each report as delivered by the US Army Corps of Engineers' Engineering Research and Development Center, Construction Engineering Research Laboratory (ERDC-CERL).

Report Column Names

Most of the descriptions include a table listing the columns of the report being described, formatted as follows:

ORDER	COLUMN NAME
1	<i>Site No</i>
2	<i>Site Name</i>
3	<i>Complex No</i>

Be aware that the Column Names listed in the table are *aliases* for the name of the database field that is being referenced; the column names have been “translated” to a word or phrase that will be more meaningful and easily understood by the end user. This word or phrase is called an *alias*. How to rename a report column by changing the alias will be covered in Part II.

Basic Description:

Printable report that lists all of the possible Section types used in this instance of BUILDER.

If this report is tabular, then what are the rows?

Each row is a unique BUILDER CMC.

Is this report filtered? If so, how?

No, this report shows all CMCs.

Additional Notes:

A CMC identifies a unique Section type broken out by Component, Material and Subtype.

Sample Page:

BUILDER®

USAF Inventory Catalog

System:

A10 FOUNDATIONS

Component:

A1010 STANDARD FOUNDATIONS

Material / Equipment Category	Component Type	CMC	Design Life	UM
A101001 WALL FOUNDATIONS	General	41000	100	LF
A101001 WALL FOUNDATIONS	Other	42000	100	LF
A101001 WALL FOUNDATIONS	Unknown	43000	100	LF
A101001 WALL FOUNDATIONS	Foundation Wall	30212	100	SF
A101001 WALL FOUNDATIONS	Grade Beams	21351	100	LF
A101001 WALL FOUNDATIONS	Strip Footing	21350	100	LF
A101002 COLUMN FOUNDATIONS & PILE CAPS	General	41001	100	EA
A101002 COLUMN FOUNDATIONS & PILE CAPS	Other	42001	100	EA
A101002 COLUMN FOUNDATIONS & PILE CAPS	Unknown	43001	100	EA
A101002 COLUMN FOUNDATIONS & PILE CAPS	Column Pier	30001	100	EA
A101002 COLUMN FOUNDATIONS & PILE CAPS	Column Pier - Concrete	30002	100	EA
A101002 COLUMN FOUNDATIONS & PILE CAPS	Column Pier - Steel	30003	100	EA
A101002 COLUMN FOUNDATIONS & PILE CAPS	Column Pier - Wood	30004	60	EA
A101002 COLUMN FOUNDATIONS & PILE CAPS	Pile Cap	21348	100	EA
A101002 COLUMN FOUNDATIONS & PILE CAPS	Spread Footing	21347	100	EA
A101003 DEWATERING	General	41002	100	SF
A101003 DEWATERING	Other	42002	100	SF
A101003 DEWATERING	Unknown	43002	100	SF
A101000 OTHER STANDARD FOUNDATIONS	General	41003	100	EA
A101000 OTHER STANDARD FOUNDATIONS	Other	21349	100	EA
A101000 OTHER STANDARD FOUNDATIONS	Unknown	43003	100	EA

Component:

A1020 SPECIAL FOUNDATIONS

Material / Equipment Category	Component Type	CMC	Design Life	UM
A102001 PILE FOUNDATIONS	General	41004	100	SF
A102001 PILE FOUNDATIONS	Other	42004	100	SF
A102001 PILE FOUNDATIONS	Unknown	43004	100	SF
A102001 PILE FOUNDATIONS	CIP Concrete	21357	100	EA
A102001 PILE FOUNDATIONS	PC Concrete	21356	100	EA
A102001 PILE FOUNDATIONS	Steel H Section	21354	100	EA
A102001 PILE FOUNDATIONS	Steel Pipe	21355	100	EA
A102001 PILE FOUNDATIONS	Treated Wood	21353	60	EA
A102002 CAISSONS	General	30214	100	LF
A102002 CAISSONS	Other	42005	100	SF
A102002 CAISSONS	Unknown	43005	100	SF
A102003 UNDERPINNING	General	41006	100	LF
A102003 UNDERPINNING	Other	42006	100	LF
A102003 UNDERPINNING	Unknown	43006	100	LF
A102004 DEWATERING	General	41007	100	SF
A102004 DEWATERING	Other	42007	100	SF

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Final 1 – Facility Summary Report

Basic Description:

A list of Buildings/Facilities entered into BUILDER where at least one Component has been entered. Includes some basic facility-level data columns.

If this report is tabular, then what are the rows?

Each row is a unique Building/Facility.

Is this report filtered? If so, how?

Yes, this report only shows Facilities where at least one Component has been entered into BUILDER.

Additional Notes:

“Installation Code” is the Site Number; “Installation Name” is the Site Name; “Special Area” is the Complex Name.

Report Columns:

ORDER	COLUMN NAME
1	<i>Inst Code</i>
2	<i>Installation Name</i>
3	<i>Special Area</i>
4	<i>RPUID</i>
5	<i>Bldg Num</i>
6	<i>Bldg Name</i>
7	<i>Const Type</i>
8	<i>Floors</i>
9	<i>Category Code</i>
10	<i>English UM</i>
11	<i>Metric UM</i>
12	<i>Size (English)</i>
13	<i>Const Year</i>
14	<i>PRV</i>
15	<i>MDI</i>
16	<i>BCI</i>
17	<i>Sum of Work Items</i>
18	<i>CRV</i>
19	<i># of Components</i>

Final 2 – System Summary Report

Basic Description:

A list of Systems and their condition ratings, sorted by Building/Facility.

If this report is tabular, then what are the rows?

Each row is a unique System, arranged by Building/Facility.

Is this report filtered? If so, how?

No, all Systems are displayed. (However, a Building/Facility might not appear if it doesn't contain a System.)

Additional Notes:

“Installation Code” is the Site Number; “Installation Name” is the Site Name; “Special Area” is the Complex Name.

Report Columns:

ORDER	COLUMN NAME
1	<i>Installation Code</i>
2	<i>Installation Name</i>
3	<i>Special Area</i>
4	<i>RPUID</i>
5	<i>Bldg Num</i>
6	<i>Bldg Name</i>
7	<i>Category Code</i>
8	<i>English UM</i>
9	<i>Metric UM</i>
10	<i>Size (English)</i>
11	<i>Floors</i>
12	<i>Const Year</i>
13	<i>BCI</i>
14	<i>System</i>
15	<i>System CI</i>
16	<i>System CRV</i>
17	<i>Facility ID</i>
18	<i>System ID</i>

Final 3 – Component Details Report

Basic Description:

A list of Component-Sections and their ratings sorted by Building/Facility, System, Component, SUB-Component.

If this report is tabular, then what are the rows?

Each row is a unique Component-Section broken out by Facility.

Is this report filtered? If so, how?

No, all Component-Sections are displayed. (However, a Building/Facility might not appear if it doesn't contain a Component-Section.)

Additional Notes:

“Installation Code” is the Site Number; “Installation Name” is the Site Name; “Special Area” is the Complex Name.

Report Columns:

ORDER	COLUMN NAME
1	<i>Inst Code</i>
2	<i>Installation Name</i>
3	<i>Special Area</i>
4	<i>RPUID</i>
5	<i>Bldg Num</i>
6	<i>Bldg Name</i>
7	<i>Size (English)</i>
8	<i>MDI</i>
9	<i>System</i>
10	<i>Component</i>
11	<i>Mat / Equip Type</i>
12	<i>Comp Type</i>
13	<i>Section Name</i>
14	<i>Section Year</i>
15	<i>Section Year Source</i>
16	<i>Quantity</i>
17	<i>UM</i>
18	<i>CRV</i>
19	<i>CI</i>
20	<i>RSL (years)</i>
21	<i>Comments</i>
22	<i>Asset ID</i>

Final 4 – Equipment Details Report

Basic Description:

A list of Section Details (i.e., pieces of EQUIPMENT) sorted by Building/Facility, System, Component, SUB-Component, Section.

If this report is tabular, then what are the rows?

Each row is a unique Section Detail (i.e., piece of equipment)

Is this report filtered? If so, how?

No, all Section Details are displayed. (However, a Building/Facility might not appear if it doesn't contain a Section Detail.)

Additional Notes:

“Installation Code” is the Site Number; “Installation Name” is the Site Name; “Special Area” is the Complex Name.

Report Columns:

ORDER	COLUMN NAME
1	<i>Inst Code</i>
2	<i>Installation Name</i>
3	<i>Special Area</i>
4	<i>RPUID</i>
5	<i>Bldg Num</i>
6	<i>Bldg Name</i>
7	<i>System</i>
8	<i>Component</i>
9	<i>Mat / Equip Type</i>
10	<i>Component Type</i>
11	<i>Section Name</i>
12	<i>Section Year</i>
13	<i>Section Year Source</i>
14	<i>Quantity</i>
15	<i>UM</i>
16	<i>CRV</i>
17	<i>CI</i>
18	<i>RSL (years)</i>
19	<i>Asset ID</i>
20	<i>ID Number</i>
21	<i>Equipment Type</i>
22	<i>Equipment Make</i>
23	<i>Model</i>
24	<i>Serial Number</i>
25	<i>Capacity</i>
26	<i>Manufacturer</i>
27	<i>Date Manufactured</i>
28	<i>Date Installed</i>
29	<i>Control Type Make</i>
30	<i>Warranty Date #1</i>
31	<i>Warranty Company #1</i>
32	<i>Location</i>
33	<i>Comment</i>
34	<i>Warranty Date #2</i>
35	<i>Warranty Company #2</i>

Final 5 – Inspection Summary Report

Basic Description:

A list of inspected Sections sorted by Site, Complex, Building/Facility, System, Component, subcomponent. Information is included about the LATEST inspection on that Section.

If this report is tabular, then what are the rows?

Each row is a unique Section matched to its LATEST inspection record.

Is this report filtered? If so, how?

Yes, this report only shows the LATEST (MOST RECENT) inspection against the listed Section.

Additional Notes:

“Installation Code” is the Site Number; “Installation Name” is the Site Name; “Special Area” is the Complex Name.

Report Columns:

ORDER	COLUMN NAME
1	<i>Inst Code</i>
2	<i>Installation Name</i>
3	<i>Special Area</i>
4	<i>RPUID</i>
5	<i>Bldg Num</i>
6	<i>Bldg Name</i>
7	<i>Component</i>
8	<i>Mat / Equip Type</i>
9	<i>Component Type</i>
10	<i>Section Name</i>
11	<i>Quantity</i>
12	<i>UM</i>
13	<i>Section Year</i>
14	<i>Section Year Source</i>
15	<i>Inspection Date</i>
16	<i>Inspection Type</i>
17	<i>Inspection Rating</i>
18	<i>Inspector</i>
19	<i>Comments</i>

Final 6 – Distress Details Report

Basic Description:

A list of Sections that were inspected using a DISTRESS SURVEY inspection sorted by Site, Complex, Building/Facility, System, Component, SUB-Component.

If this report is tabular, then what are the rows?

Each row is a unique DISTRESS SURVEY inspection record.

Is this report filtered? If so, how?

Yes, this report only shows inspection records for which a DISTRESS SURVEY inspection was performed. Only shows Buildings/Facilities for which a DISTRESS SURVEY inspection was performed.

Additional Notes:

“Installation Code” is the Site Number; “Installation Name” is the Site Name; “Special Area” is the Complex Name.

Report Columns:

ORDER	COLUMN NAME
1	<i>Inst Code</i>
2	<i>Installation Name</i>
3	<i>Special Area</i>
4	<i>RPUID</i>
5	<i>Bldg Num</i>
6	<i>Bldg Name</i>
7	<i>Component</i>
8	<i>Mat / Equip Type</i>
9	<i>Component Type</i>
10	<i>Section Name</i>
11	<i>Qty</i>
12	<i>UM</i>
13	<i>Inspection Date</i>
14	<i>Insp CI</i>
15	<i>Inspector</i>
16	<i>Comments</i>
17	<i>Sub-Component</i>
18	<i>Critical?</i>
19	<i>ESC?</i>
20	<i>Distress</i>
21	<i>Severity</i>
22	<i>Distress Qty</i>
23	<i>Sub-Component Quantity</i>
24	<i>Density</i>

Final 7 – Work Action Summary Report

Basic Description:

A list of Buildings/Facilities, broken out by System, and a sum of all work items generated against that System.

If this report is tabular, then what are the rows?

Each row is a unique System, arranged by Building/Facility, with a rollup cost of all of the work items against that System.

Is this report filtered? If so, how?

No, this report shows all Systems with work items. (But a Facility might not appear when it has no System where at least one work item has been generated against it.)

Additional Notes:

“Installation Code” is the Site Number; “Installation Name” is the Site Name; “Special Area” is the Complex Name.

Report Columns:

ORDER	COLUMN NAME
1	<i>Inst Code</i>
2	<i>Installation Name</i>
3	<i>Special Area</i>
4	<i>RPUID</i>
5	<i>Bldg Num</i>
6	<i>Bldg Name</i>
7	<i>Category Code</i>
8	<i>System</i>
9	<i>Number of Tasks</i>
10	<i>Estimated Cost (Sum of Work Items)</i>
11	<i>CRV</i>
12	<i>System CI</i>
13	<i>System ID</i>

Final 8 – Work Action Details Report

Basic Description:

A detail listing of all work items generated against this Building/Facility.

If this report is tabular, then what are the rows?

Each row is a unique WORK ITEM.

Is this report filtered? If so, how?

No, this report shows all work items. (However, a Building/Facility might not appear if it doesn't have a work item generated against it.)

Additional Notes:

“Installation Code” is the Site Number; “Installation Name” is the Site Name; “Special Area” is the Complex Name.

Report Columns:

ORDER	COLUMN NAME
1	<i>Inst Code</i>
2	<i>Installation Name</i>
3	<i>Special Area</i>
4	<i>RPUID</i>
5	<i>Bldg Num</i>
6	<i>Bldg Name</i>
7	<i>Category Code</i>
8	<i>System</i>
9	<i>Component</i>
10	<i>Mat / Equip Type</i>
11	<i>Comp Type</i>
12	<i>Section Name</i>
13	<i>Section Comments</i>
14	<i>Quantity</i>
15	<i>UM</i>
16	<i>Work Item Description</i>
17	<i>Estimated Cost</i>
18	<i>Fiscal Year</i>
19s	<i>Completion Date</i>
20	<i>Actual Cost</i>
21	<i>Work Request Number</i>
22	<i>Facility ID</i>
23	<i>System ID</i>
24	<i>Component ID</i>
25	<i>Asset ID</i>
26	<i>Work Item ID</i>

Final 9 – Facility System Quick View Report

Basic Description:

A cross-tab report (pivot table); for each Facility this report displays the System CI for each of the 22 Systems.

If this report is tabular, then what are the rows?

Each row is a unique Building/Facility.

Is this report filtered? If so, how?

Yes, this report only shows Facilities where at least one System has been entered into BUILDER and it only includes facilities where the BUILDING STATUS is not equal to either “Demolished” or “Transferred”.

Additional Notes:

“Installation Code” is the Site Number; “Installation Name” is the Site Name; “Special Area” is the Complex Name.

Report Columns:

ORDER	COLUMN NAME
1	Installation Code
2	Installation Name
3	Special Area
4	RPUID
5	Bldg Num
6	Bldg Name
7	MDI
8	Category Code
9	English UM
10	Metric UM
11	Size (English)
12	Floors
13	Const Year
14	BCI
15	A10
16	A20
17	B10
18	B20
19	B30
20	C10
21	C20
22	C30
23	D10
24	D20
25	D30
26	D40
27	D50
28	E10
29	E20
30	F10
31	F20
32	G10
33	G20
34	G30
35	G40
36	G90

Inspection Locks Report

Basic Description:

A list of Systems and the individual users who have RECORD-LOCKS in effect on that System.

If this report is tabular, then what are the rows?

Each row is a unique System broken out by Building/Facility.

Is this report filtered? If so, how?

Yes, this report only shows Systems for which a user has checked out the System and an inspection Record-Lock is in place for that System.

Additional Notes:

“Installation Code” is the Site Number; “Installation Name” is the Site Name; “Special Area” is the Complex Name.

Report Columns:

ORDER	COLUMN NAME
1	<i>Installation Code</i>
2	<i>Installation Name</i>
3	<i>Special Area</i>
4	<i>RPUID</i>
5	<i>Bldg Num</i>
6	<i>Bldg Name</i>
7	<i>Category Code</i>
8	<i>Area (English)</i>
9	<i>Area (Metric)</i>
12	<i>Floors</i>
13	<i>Const Year</i>
14	<i>System</i>
15	<i>Checked Out By</i>
16	<i>Facility ID</i>
17	<i>System ID</i>

QA 01 – Missing or Low Inventory Report

Basic Description:

A listing of facilities for which there are fewer than 10 Sections. (Low Section count).

If this report is tabular, then what are the rows?

Each row is a unique Building/Facility.

Is this report filtered? If so, how?

Yes, this report only shows Facilities for which the count of Sections for this Facility < 10.

Additional Notes:

This report as well as the other QA reports is used to identify “flags”. These could be false “positives”, but worth looking into to verify information is correct.

Report Columns:

ORDER	COLUMN NAME
1	Special Area
2	Bldg Num
3	Bldg Name
4	Bldg Size
5	Bldg Size UM
6	System
7	Component
8	Section Name
9	Mat/Equip Type
10	Comp Type
11	Install Date
12	English Section Qty
13	English Section UM
14	Metric Section Qty
15	Metric Section UM
16	Building Section Count
17	SQ Feet Per Section
18	Section Comments

QA 02 – Missing Components Report

Basic Description:

A listing of Sections for which there is missing or insufficient comments to fully describe the Section type.

If this report is tabular, then what are the rows?

Each row is a unique Section.

Is this report filtered? If so, how?

Yes, this report shows Sections where any of these cases is true and the Mat_Cat description contains “90” and Comments are missing:

- (1) Section Comments is NULL and Section Comp_Type is "Other"
- (2) Section Comments is Null and Section Comp_Type is “Unknown”
- (3) Section Comments is NULL and Section Comp-Type is "General"

Additional Notes:

Report Columns:

ORDER	COLUMN NAME
1	Special Area
2	Bldg Num
3	Bldg Name
4	System
5	Component
6	Section Name
7	Mat/Equip Type
8	Comp Type
9	Install Date
10	English Qty
11	English UM
12	Metric Qty
13	Metric UM
14	Section Comments

QA 03 – Naming Discrepancies Report

Basic Description:

A list of Section names that are used infrequently (fewer than 5 times) in the database.

If this report is tabular, then what are the rows?

Each row is a unique Section NAME.

Is this report filtered? If so, how?

Yes, this report shows Section NAMES where the Instance Count of the Section Name is less than 5.

Additional Notes:

Report Columns:

ORDER	COLUMN NAME
1	Section Name
2	Instance Count
3	Bldg Num
4	Bldg Name
5	System
6	Component
7	Mat / Equip Type
8	Component Type
9	English Qty
10	English UM
11	Metric Qty
12	Metric UM
13	Section Comments

QA 04 – Suspect Section Inventory Report

Basic Description:

A list of Sections for which the Section quantity or age is suspect or inconsistent with building quantities.

If this report is tabular, then what are the rows?

Each row is a unique Section.

Is this report filtered? If so, how?

Yes, this report shows Sections where any of these cases is true:

- (1) Section Quantity > 200 EACH
- (2) Section Quantity is greater than Building Quantity
- (3) Section Age is greater than Building Age.

Additional Notes:

This report can potentially expose transcription errors, such as when assessor puts the year installed in the quantity field.

Report Columns:

ORDER	COLUMN NAME
1	Special Area
2	Bldg Num
3	Bldg Name
4	Bldg Year
5	System
6	Component
7	Section Name
8	Mat/Equip Type
9	Comp Type
10	Install Date
11	English Qty
12	English UM
13	Metric Qty
14	Metric UM
15	Section Comments

QA 05 – Missing Section Details Report

Basic Description:

A list of Sections for which there are no Section Details (i.e. equipment) entered into BUILDER.

If this report is tabular, then what are the rows?

Each row is a unique Section.

Is this report filtered? If so, how?

Yes, this report shows Sections where these are both true:

- (1) Section UoM is "EA"
- (2) Count of Section Details is less than the Section Quantity.

Additional Notes:

Report Columns:

ORDER	COLUMN NAME
1	Special Area
2	Bldg Num
3	Bldg Name
4	System
5	Component
6	Section Name
7	Mat/Equip Type
8	Comp Type
9	Install Date
10	English Qty
11	English UM
12	Metric Qty
13	Metric UM
14	# of Section Details
15	# of Missing Section Details
16	Section Comments

QA 06 – Missing Section Detail Images Report

Basic Description:

A list of Sections for which there are no Section Detail images entered into BUILDER.

If this report is tabular, then what are the rows?

Each row is a unique Section.

Is this report filtered? If so, how?

Yes, this report shows Sections where there is no IMAGE loaded at the Section Detail level.

Additional Notes:

Report Columns:

ORDER	COLUMN NAME
1	Special Area
2	Bldg Num
3	Bldg Name
4	System
5	Component
6	Section Name
7	Mat/Equip Type
8	Comp Type
9	Install Date
10	English Qty
11	English UM
12	Metric Qty
13	Metric UM
14	# of Section Images
15	# of Section Detail Images
16	Section Comments

QA 07 – Sections Without Inspections Report

Basic Description:

A list of Sections for which there are no Inspections entered into BUILDER (at the Component-Section level).

If this report is tabular, then what are the rows?

Each row is a unique Section.

Is this report filtered? If so, how?

Yes, this report shows Sections where there is no inspection entry.

Additional Notes:

Report Columns:

ORDER	COLUMN NAME
1	Special Area
2	Bldg Num
3	Bldg Name
4	System
5	Component
6	Section Name
7	Mat/Equip Type
8	Comp Type
9	Install Date
10	English Qty
11	English UM
12	Metric Qty
13	Metric UM
14	Section Comments

QA 08 – Section Details Without Inspections Report

Basic Description:

A list of Section Details that were inventoried for which do not have inspections entered into BUILDER.

If this report is tabular, then what are the rows?

Each row is a unique Section Detail.

Is this report filtered? If so, how?

Yes, this report shows Section Details where there is no inspection entry.

Additional Notes:

This report focuses specifically on situation where RPIE (real property installed equipment) inventory was collected, but there are no inspections performed.

Report Columns:

ORDER	COLUMN NAME
1	Special Area
2	Bldg Num
3	Bldg Name
4	System
5	Component
6	Section Name
7	Mat/Equip Type
8	Comp Type
9	Install Date
10	English Qty
11	English UM
12	Metric Qty
13	Metric UM
14	Section Comments

QA 09 – Section Details Discrepancies Report

Basic Description:

A list of Section Details for which the Install Date is suspect or missing.

If this report is tabular, then what are the rows?

Each row is a unique Section Detail.

Is this report filtered? If so, how?

Yes, this report shows Sections where any of these cases is true:

- (1) Section Detail Install Date < Section Install Date
- (2) Section Detail Install Date > (Section Install Date + 2 years)
- (3) Section Detail Install Date is missing.

Additional Notes:

Report Columns:

ORDER	COLUMN NAME
1	Special Area
2	Bldg Num
3	Bldg Name
4	System
5	Component
6	Section Name
7	Mat/Equip Type
8	Comp Type
9	Section Install Date
10	English Qty
11	English UM
12	Metric Qty
13	Metric UM
14	Section ID
15	Section Detail Install Date
16	Section Comments

QA 10 – Missing Inspection Comments Report

Basic Description:

A list of inspections where a poor rating of Amber or Red was given, but no comment or reason was provided for the poor rating.

If this report is tabular, then what are the rows?

Each row is a unique inspection.

Is this report filtered? If so, how?

Yes, this report shows inspections where the rating was either Amber or RED and there are no comments providing a reason for the low rating.

Additional Notes:

Report Columns:

ORDER	COLUMN NAME
1	Inspector
2	Special Area
3	Bldg Num
4	Bldg Name
5	System
6	Component
7	Section Name
8	Mat/Equip Type
9	Comp Type
10	Install Date
11	English Qty
12	English UM
13	Metric Qty
14	Metric UM
15	Inspection Rating
16	Inspection Date
17	Section Comments

QA 11 – Section Condition Analysis Exception

Basic Description:

A list of Sections for which the variance between Age and Design Life exceeds certain constraints (plus or minus 20%).

If this report is tabular, then what are the rows?

Each row is a unique Section.

Is this report filtered? If so, how?

Yes, this report shows Sections where at least one of these cases is true:

- (1) The Variance $((\text{RSL} + \text{Age}) / \text{Design Life}) < 0.8$
- (2) The Variance $((\text{RSL} + \text{Age}) / \text{Design Life}) > 1.4$.

Additional Notes:

Report Columns:

ORDER	COLUMN NAME
1	Special Area
2	Bldg Num
3	Bldg Name
4	System
5	Component
6	Section Name
7	Mat/Equip Type
8	Comp Type
9	Section Install Date
10	Initial Condition
11	Age
12	Design Life (DL)
13	Actual Service Life (ASL)
14	Variance (ASL / DL)
15	Section Comments

QA 12A – Inspection Matrix – By Site, System, Inspector

Basic Description:

A cross-tab report (pivot table); for each System, a count of Green, Amber, Red scores by Inspector.

If this report is tabular, then what are the rows?

Each row is a unique System, broken down by inspector.

When the report is run at the Site level, there will be a second header column across the top of the report listing the site name, followed by a row that supplies site-wide data for columns 4 through 10. (At the Site level, the Inspector column will have no data.)

Is this report filtered? If so, how?

No.

Additional Notes:

Analysis of Inspector scores can help reveal any inspector biases or inconsistencies.

Report Columns:

ORDER	COLUMN NAME
1	Cmplx or Site No
2	Cmplx or Site Name
3	Inspector
4	Total # of Inspections
5	# of Green Scores
6	# of Amber Scores
7	# of Red Scores
8	% of Green Scores
9	% of Amber Scores
10	% of Red Scores

QA 12B – Inspection Matrix – By Site, System

Basic Description:

A cross-tab report (pivot table); for each System, a count of Green, Amber, or Red scores.

If this report is tabular, then what are the rows?

Each row is a unique System.

Is this report filtered? If so, how?

No.

Additional Notes:

Analysis of Inspector scores can help reveal any inspector biases or inconsistencies.

Report Columns:

ORDER	COLUMN NAME
1	Site or Complex
2	System
3	Total # of Inspections
4	# of Green Scores
5	# of Amber Scores
6	# of Red Scores
7	% of Green Scores
8	% of Amber Scores
9	% of Red Scores

QA 12C – Inspection Matrix – By Site, Inspector, System

Basic Description:

A cross-tab report (pivot table); for each Inspector, a count of Green, Amber, Red scores by System.

If this report is tabular, then what are the rows?

Each row is a unique INSPECTOR broken down by System.

Is this report filtered? If so, how?

No.

Additional Notes:

Analysis of Inspector scores can help reveal any inspector biases or inconsistencies.

Report Columns:

ORDER	COLUMN NAME
1	Site No
2	Inspector
3	Site Name
4	System
5	Total # of Inspections
6	# of Green Scores
7	# of Amber Scores
8	# of Red Scores
9	% of Green Scores
10	% of Amber Scores
11	% of Red Scores

QA 12D – Inspection Matrix – By Inspector

Basic Description:

A cross-tab report (pivot table); for each Inspector, a count of Green, Amber, Red scores.

If this report is tabular, then what are the rows?

Each row is a unique inspector.

Is this report filtered? If so, how?

No.

Additional Notes:

Analysis of Inspector scores can help reveal any inspector biases or inconsistencies.

Report Columns:

ORDER	COLUMN NAME
1	Site No
2	Site Name
3	Avg Score
4	Total # of Inspections
5	# of Green Scores
6	# of Amber Scores
7	# of Red Scores
8	% of Green Scores
9	% of Amber Scores
10	% of Red Scores

Basic Description:

A cross-tab report (pivot table); for each Inspector, a count of Green, Amber, Red scores by System. The bar graph below the cross-tab report shows the breakdown of scores for each System.

If this report is tabular, then what are the rows?

Each row is a unique System.

Is this report filtered? If so, how?

No.

Additional Notes:

The columns under the headings “Green Scores”, “Amber Scores”, and “Red Scores” provide both total number and percentage.

Analysis of Inspector scores can help reveal any inspector biases or inconsistencies.

Report Columns:

ORDER	COLUMN NAME
1	Site
2	Total # of Inspections
3	Green Scores
4	Amber Scores
5	Red Scores

QC 1 – Facilities Report

Basic Description:

A list of facilities entered into BUILDER where the BCI is not null.

If this report is tabular, then what are the rows?

Each row is a unique Building/Facility.

Is this report filtered? If so, how?

Yes, this report shows only facilities for which the BCI is not null.

Additional Notes:

Key columns are provided to aid the user in the Quality Control phase of data entry.

Report Columns:

ORDER	COLUMN NAME
1	Site No
2	Site Name
3	Complex No
4	Complex Name
5	Facility No
6	Facility Name
7	Category Code
8	Const Year
9	Bldg Size
s10	Floors
11	BCI
12	Bldg PRV
13	Num Sections
14	Site ID
15	Complex ID
16	Facility ID

QC 2 – Systems Report

Basic Description:

A list of all Systems entered into BUILDER for Facilities where the BCI is not null.

If this report is tabular, then what are the rows?

Each row is a unique System.

Is this report filtered? If so, how?

Yes, this report shows Systems for Buildings/Facilities where the BCI is not null.

Additional Notes:

Key columns are provided to aid the user in the Quality Control phase of data entry.

Report Columns:

ORDER	COLUMN NAME
1	Site No
2	Site Name
3	Complex No
4	Complex Name
5	Facility No
6	Facility Name
7	Const Year
8	Bldg Size
9	Floors
10	BCI
11	System
12	SCI
13	Num Sections
14	Site ID
15	Complex ID
16	Facility ID
17	System ID

QC 3 – Components Report

Basic Description:

A list of all Components entered into BUILDER for Facilities where the BCI is not null.

If this report is tabular, then what are the rows?

Each row is a unique Component.

Is this report filtered? If so, how?

Yes, this report shows Components for Buildings/Facilities where the BCI is not null.

Additional Notes:

Key columns are provided to aid the user in the Quality Control phase of data entry.

Report Columns:

ORDER	COLUMN NAME
1	Site No
2	Site Name
3	Complex No
4	Complex Name
5	Facility No
6	Facility Name
7	Const Year
8	Bldg Size
9	Floors
10	BCI
11	System
12	Component
13	BCCI
14	CRV
15	Num Sections
16	Site ID
17	Complex ID
18	Facility ID
19	System ID
20	Component ID

QC 4 – Component-Sections Report

Basic Description:

A list of all Sections entered into BUILDER for Facilities where the BCI is not null.

If this report is tabular, then what are the rows?

Each row is a unique Section.

Is this report filtered? If so, how?

No.

Additional Notes:

Key columns are provided to aid the user in the Quality Control phase of data entry.

Report Columns:

ORDER	COLUMN NAME
1	Site No
2	Site Name
3	Complex No
4	Complex Name
5	Facility No
6	Facility Name
7	Const Year
8	Bldg Size
9	Floorss
10	System
11	Component
12	Mat/Equip Type
13	Section Subtype
14	Section Name
15	Section Qty
16	Section UM
17	Section Year
18	Section Year Source
19	Section DL
20	Section Age
21	Section RDL
22	Section RSL
23	Painted?
24	Paint Year
25	CSCI
26	CSCCI
27	Section Comments
28	Num Inspections
29	Num Details
30	Num Section Images
31	Site ID
32	Complex ID
33	Facility ID
34	System ID
35	Component ID
36	Section ID

QC 5 – Section Details Report

Basic Description:

A list of Section Details entered into BUILDER.

If this report is tabular, then what are the rows?

Each row is a unique Section-Detail.

Is this report filtered? If so, how?

No.

Additional Notes:

Key columns are provided to aid the user in the Quality Control phase of data entry.

Report Columns:

ORDER	COLUMN NAME
1	Site No
2	Site Name
3	Complex No
4	Complex Name
5	Facility No
6	Facility Name
7	Const Year
8	Bldg Size
9	Floors
10	System
11	Component
12	Mat / Equip Type
13	Section Subtype
14	Section Name
15	Section Qty
16	Section UM

Report Columns, continued:

ORDER	COLUMN NAME
17	Section Year
18	Section Year Source
19	Section DL
20	Section Age
21	Section RDL
22	Section RSL
23	Painted?
24	Paint Year
25	CSCI
26	CSCCI
27	Section Comments
28	ID Number
29	Equipment Type
30	Equipment Make
31	Equipment Model
32	Serial Number
33	Capacity
34	Manufacturer
35	Date Manufactured
36	Date Installed
37	Control Type Make
38	Warranty Date 1
39	Warranty Company 1
40	Location
41	Comment
42	Warranty Date 2
43	Warranty Company 2
44	Num Detail Images
45	Site ID
46	Complex ID
47	Facility ID
48	System ID
49	Component ID
50	Section ID
51	Section Detail ID

QC 6 – Inspections Report

Basic Description:

A list of all inspections entered into BUILDER.

If this report is tabular, then what are the rows?

Each row is a unique inspection.

Is this report filtered? If so, how?

No, this report shows ALL inspections, not only the LATEST.

Report Columns:

ORDER	COLUMN NAME
1	Site No
2	Site Name
3	Complex No
4	Complex Name
5	Facility No
6	Facility Name
7	Const Year
8	Bldg Size
9	Floors
10	System
11	Component
12	Mat / Equip Type
13	Section Subtype
14	Section Name
15	Section Qty
16	Section UM

Report Columns, continued:

ORDER	COLUMN NAME
17	Section Year
18	Section Year Source
19	Section DL
20	Section Age
21	Section RDL
22	Section RSL
23	Painted?
24	Paint Year
25	CSCI
26	CSCCI
27	Section Comments
28	Insp Date
29	Insp Type
30	Insp Source
31	Inspector
32	Expected Rating
33	Comp Rating
34	Paint Rating
35	Num Inspection Images
36	Insp Comments
37	Site ID
38	Complex ID
39	Facility ID
40	System ID
41	Component ID
42	Section ID
43	Inspection ID

Part II: How To Modify a Custom Report Specification or Create a New Report

Tools and Information Needed

What tool do I use to modify BUILDER Custom Reports?

Custom BUILDER reports can be created or modified using one of two interfaces:

- a. SQL Server Reporting Services (SSRS), which is one of Microsoft's Business Intelligence (BI) tools for Visual Studio; OR
- b. Microsoft SQL Server Report Builder.

In the documentation below, your choice will be referred to as "report writing tool."

This documentation is not intended as an instruction manual for either one of these report writing tools. Competence with the chosen tool is assumed for anyone who is undertaking to modify BUILDER Custom Reports. Basic pointers or reminders may be listed here as a courtesy but they should not be taken as an indication of responsibility to instruct Partners or end users in use of a report writing tool.

What other information do I need?

A separate Appendix document is provided to Partners that lists the SQL Server Data View names for each Custom Report.

WARNING: Partners agree not to transmit any of the Appendix information or database details to any end user in any manner.

Also, when making modifications to existing BUILDER Custom Reports or creating new ones, Partners or end users should consult the following sections below:

1. Data Dependencies in BUILDER Custom Reports
2. Referencing Organizations, Sites, and Complexes in the BUILDER Database

Documentation Responsibility

Because BUILDER Custom Reports can be modified, Partners or other organizations making such modifications should provide to their staff and/or clients updated documentation that reflects the modifications.

WARNING: Partners accept full responsibility for documenting to the end user any alteration, deletion, or addition made by the Partner to the BUILDER Custom Reports. Any part of this document that is passed on by a Partner to its end users of BUILDER Custom Reports should carry a new, replacement title page identifying the Partner as the support contact for software and documentation questions.

How To Modify a Custom Report Specification

Examples of modifications you may want to make to a Custom Report specification are

1. Changing the name of a column;
2. Adding a column;
3. Deleting a column.

What do I need to know before modifying a Custom Report?

Before modifying a Custom Report specification, you need to know:

1. The name of the database involved.
2. Which view is associated with the report you want to modify.

To identify the name of the view associated with a particular report, refer to the Appendix: **SQL Server Data-View Name—By Report**.

What steps do I take to modify a Custom Report in SQL?

When you have identified the view associated with the report you wish to modify, do the following steps in SQL Server Management Studio (SSMS):

1. In the listing at the left of databases and views, right-click on the view.
2. From the dropdown list, select “Script View as.”
3. From that dropdown list, select “ALTER To.”
4. Select “New Query Editor Window.”
5. Make whatever changes in the structure in the view that you need to make.
6. Activate the Execute! button to execute the ALTER VIEW command.

WARNING: Be sure to document your changes. If a new, improved base version of the Custom Reports package is released, you may want to take advantage of the new version. In this case you would need to re-integrate your changes into the new base.

How do I change the name of a column heading?

You can change the name of a column heading with the report writing tool, or you can do it directly in SSMS as follows:

If a report column heading name is the same as the database column it references, you have the option of creating a different name for the report column by using an *alias* as follows:

[Name of database field being referenced] AS *MyColumnName*

To change the name of a column heading when the column name is already an alias for the database field being referenced, change the alias statement as shown below.

From:

[Name of database field being referenced] AS *OldColumnName*

To:

[Name of database field being referenced] AS *NewColumnName*

How do I delete a column?

To delete a column from the report, refer to the instructions for your chosen report writing tool.

Note: The deleted column will not appear in the report, but it will still be part of the view.

How do I create a new column?

Using a report writing tool, you can only add a column that exists in the view associated with the report. To create the new column, refer to the instructions for your chosen report writing tool.

How to Create a New Custom Report

You can follow the instructions below to create and publish a BUILDER custom report using Visual Studio SQL Server Reporting Services (SSRS), one of Microsoft's Business Intelligence (BI) tools for Visual Studio.

Note: Microsoft SQL Server Report Builder may be used as an alternative.

The output from either of these report building tools is an .RDL file (RDL stands for Report Definition Language). These .RDL files can then be accessed and read using BUILDER's Custom Reports interface.

Background Information

Reports are created using a *data source* that points to the SQL Server database that underlies BUILDER. The BUILDER database is stored in SQL Server and is comprised of (1) a number of tables, as well as (2) stored data queries called (*data*) *views*.

Major Steps in Creating and Publishing a Custom Report

The major steps in creating a custom report are:

1. Either (a) Locate and choose a view or (b) Create a view.
2. Create the report source file.
3. Establish the data source and dataset(s).
4. Configure one report parameter.

Select or Create a View

The first step in creating a custom report is either (a) selecting or (b) creating a view in SQL Server Management Studio. Often, a view will be created specifically for a single report. Note however, that there exist a great number of views already created in SQL Server that you might be able to use to feed a report. So the first step is to decide whether to create a new view or adapt an existing one.

If you want to create a custom view, then you need to have READ/WRITE/CREATE access to the BUILDER SQL Server database. You also need a basic understanding of the BUILDER table structure and of the relationship between the tables.

The purpose of the view is to collect and preprocess the data columns that will be used in your report.

Create the Report Source File

The second step in creating a custom report is creating a report source file. Note that when creating a report source file, it may be simplest to start by opening and immediately renaming an existing BUILDER custom report source file (RDL). This helps ensure stylistic consistency, keeping the "look and feel" the same across all of your custom reports. It is preferable to use as your model a report with sufficient detail in it to set formatting standards, but also without a great deal of content to be deleted.

To create a report source file from scratch, use either:

- a. Visual Studio SQL Server Reporting Services (SSRS), one of Microsoft's Business Intelligence (BI) tools for Visual Studio; or
- b. Microsoft SQL Server Report Builder.

Note: These instructions do not cover how to use these report writing tools. There are a number of tutorials online to help a new user get started.

Establish the Data Source and Dataset(s)

1. In the report writing tool of your choice, you need to ****create** (**Q create vs. establish vs. specify) a *data source* that will point to the SQL Server BUILDER database. See Figure 3 for an example in SSRS.
2. Next, create a *dataset* (or sets) that uses the data source and points to the specified tables or views in the BUILDER database. Each dataset is comprised of a SQL SELECT statement that pulls the data for the report.

Note: Each report must have at least one dataset, but it may have multiple datasets that feed different regions of the report.

3. The report is constructed and previewed using the data source defined within the report until a completed report is attained. Later you will change the data source to point to the shared data source on the report server.

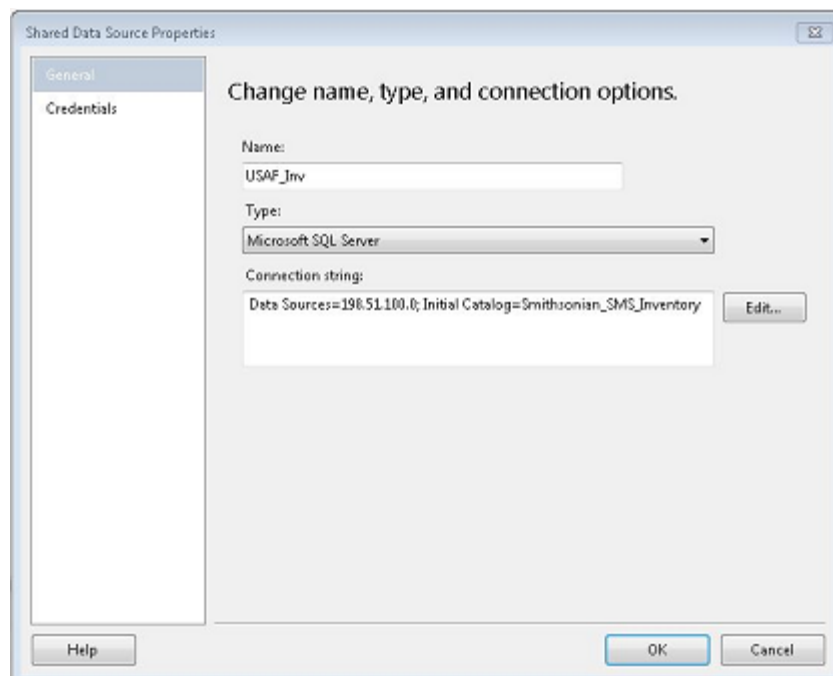


Figure 3. Data Source Creation in SSRS

Configure One Report Parameter

Another component of the report that needs to be introduced here is the *parameter*. Because BUILDER Custom Reports can reside at more than one hierarchical level—Organization, Site, or Complex—you will need to create a report parameter that matches up with the level from which the report will be run.

For example, if this is a Site-level report, a report parameter must be set up within the report to receive the SITE_ID, which BUILDER will pass to the report at run-time. The SITE_ID then behaves as a filter to confine the dataset records to that one particular Site.

Configure the report parameter using the following settings:

1. The parameter should be named BUILDERID; alternatively, SITE and COMPLEX are also valid parameter names;
2. Specify a prompt, such as “Choose a Site to Display in Report”;
3. Parameter Visibility: Hidden (See Figure 5a);
4. Available Values: None (See Figure 5b);
5. Default Values: No Default Value (See Figure 5c);
6. Advanced: Always Refresh (See Figure 5d);

At this point, you can save the report and exit the report writing tool, making a note of the .RDL filename.

How to Load an Existing Custom Report

For how to load an existing Custom Report, refer the *SMS System Administration Guide*.

Data Dependencies in BUILDER Custom Reports

Data dependencies in BUILDER Custom Reports work in two directions:

1. The view (let’s call it “View A”) associated with the report that you are working on might depend on the output or calculations of another data view (View B). If this is the case, then be aware that any change in View B might immediately cause a change in your report. Whether a change will actually occur depends on which fields are connected between the two views, and on which fields from View A you are incorporating in your report.
2. If the view (“View A”) associated with the report that you are working on is one that another BUILDER view (View B) depends on, then modifications you make to View A might immediately cause changes in View B. Whether a change will actually occur depends on which fields are connected between the two views, and on which fields you are modifying in View A.

In the #2 case, consider whether the change you are making is one what you want propagated to the other report(s) that depend(s) on the report view you are modifying. If “yes” for any and all dependent reports, then go ahead and make the change. If not, you may need to research alternative options such as creating a new view.

Referencing Organizations, Sites, and Complexes in the BUILDER Database

When you are referencing an Organization, a Site, or a Complex from the BUILDER database, note that there is *not* a separate table in the database for each of these organizational levels. Rather, there is one table, named Organization, which contains all of them. In the Organization table there is a column named ORG_TYPE, which identifies the organizational level as follows:

1. ORG_TYPE = 0 represents an Organization.
2. ORG_TYPE = 1 represents a Site.
3. ORG_TYPE = 2 represents a Complex.