

# Create Custom Report Using D1IM Report Editor

## 1. Properties

The screenshot shows the 'Edit report' dialog box with the 'Properties' tab selected. The 'Name' field is 'Non-Employee Report with AD and Attestation detail'. The 'Display name' field is 'Non-Employee Report with AD and Attestation detail'. The 'Description' field is 'Non-Employee report with Active Directory and Attestation case details. Adding parameter to detect current person running the report'. The 'Filter criteria' field is empty. The 'Base table' field is 'Person'. The 'Category' field is 'Attestation'. The 'Preprocessor condition' field is empty. There are checkboxes for 'Defined by Quest' (unchecked) and 'Custom properties' (checked). There is a section for 'Extended' properties. The 'Ok' and 'Cancel' buttons are at the bottom right.

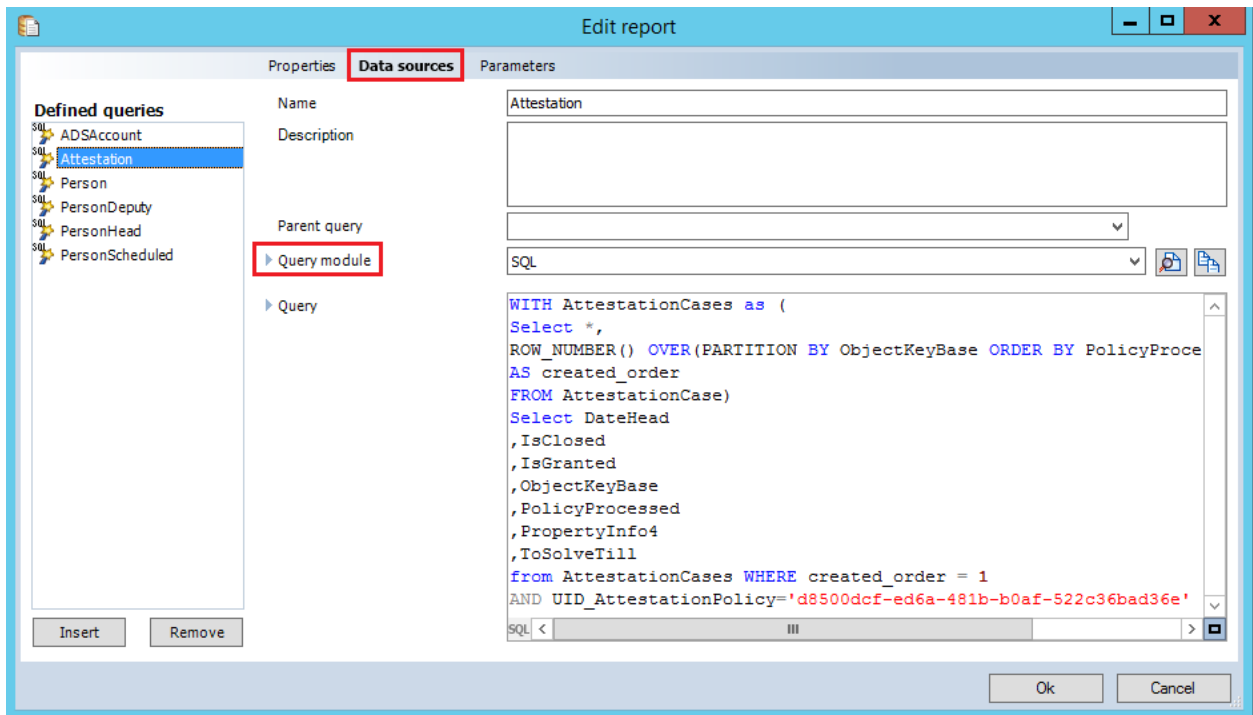
Property	Value
Name	Non-Employee Report with AD and Attestation detail
Display name	Non-Employee Report with AD and Attestation detail
Description	Non-Employee report with Active Directory and Attestation case details. Adding parameter to detect current person running the report
Filter criteria	
Base table	Person
Category	Attestation
Preprocessor condition	
Defined by Quest	<input type="checkbox"/>
Custom properties	<input checked="" type="checkbox"/>
Extended	

- Base table – provide all the data that the report need
- Category – the use of the report for the purpose (Common / Attestation / Mail)

## 2. Data source

The screenshot shows the 'Edit report' dialog box with the 'Data sources' tab selected. The 'Name' field is 'ADSAccount'. The 'Description' field is empty. The 'Parent query' field is empty. The 'Query module' field is 'Object'. The 'Table' field is 'ADSAccount'. The 'Columns' field is 'AccountDisabled, AccountExpires, cn, LastLogon, PWDLastSet, UID\_Person'. The 'Condition' field is empty. The 'Order by' field is empty. There is a checkbox for 'Resolve foreign key' (unchecked). The 'SQL' field is empty. The 'Insert' and 'Remove' buttons are at the bottom left. The 'Ok' and 'Cancel' buttons are at the bottom right.

Property	Value
Name	ADSAccount
Description	
Parent query	
Query module	Object
Table	ADSAccount
Columns	AccountDisabled, AccountExpires, cn, LastLogon, PWDLastSet, UID_Person
Condition	
Order by	
Resolve foreign key	<input type="checkbox"/>
SQL	



- Query module – Object / SQL

- SQL

Pros – a query with join or union will be able to have data from multiple tables besides base table; straightforward and easy to understand data relations; the Parameters can be used with end-user intervention for them to pass the parameter value (static) to the report when a report being generated. A single data band includes all data for the report.

Cons – does not support the runtime parameter (dynamic) when the report being generated. For example, a report cannot dynamically include data based on who subscribes the report.

- Object

Pros – data is built based on multiple tables thus you can fine gain all data from each of tables; the table relations can be built to support complex report structure; lots of features can be utilized; the Parameters not only can be used with end-user intervention for them to pass the parameter value (static) to the report when a report being generated; but also used at runtime parameter (dynamic) when the report being generated.

Cons – Complexity; the data relation among the multiple tables could be challenge to the starter; build multiple data bands and the relations of tables; arrange report lay out for multiple data bands might not be easy and straightforward.

**Edit report**

Properties **Data sources** Parameters

**Defined queries**

- ADSAccount
- Attestation
- Person**
- PersonDeputy
- PersonHead
- PersonScheduled

Name: Person

Description:

Parent query:

Query module: Object

Table: Person

Columns: CentralAccount, CustomProperty05, CustomProperty10, DefaultEmailAddress, EntryDate, ExitDate, Interna

☐ Resolve foreign key

Condition:

```
IsExternal = 1
AND (UID_PersonHead = @ReportScheduledBy
OR
UID_PersonDeputy = @ReportScheduledBy)
```

SQL < >

Orderby: CentralAccount

Insert Remove

Ok Cancel

"@ParameterName" is the syntax to reference the parameter for its value in the report

### 3. Parameters

**Edit report**

Properties Data sources **Parameters**

**Defined parameters**

- ReportScheduledBy**

Parameter name: ReportScheduledBy

**Parameter type**: Fix

Display name: Report requested by

Description:

Sort order: 99

**Mandatory parameter**: ☒

Show in parameter subsets: ☐

Can be overwritten: ☒

General Value definition Value calculation

Report requested by

Report requested by

99 99

Yes Yes

No No

Yes Yes

Insert Remove

Ok Cancel

General tab - Parameter type could be one of "Fix / Query / Calculated".

**Edit report**

Properties Data sources **Parameters**

**Defined parameters**

- ReportScheduledBy

Data type: String

Range: Inherited

Multivalue: Inherited

Multiline: Inherited

**Data source**

Table column (query): Person.UID\_Person

Condition (query):

SQL < >

☐ Empty value overrides

Sample value:

Default value:

Insert Remove

Ok Cancel

**Edit report**

Properties Data sources **Parameters**

**Defined parameters**

- AttestingPolicy
- ObjectKeyBase1
- ReportScheduledBy1
- logonusenid

Data type: String

Range: Inherited

Multivalue: Inherited

Multiline: Inherited

**Data source**

Table column (query): AttestingPolicy.UID\_AttestingPolicy

Condition (query):

SQL < >

☐ Empty value overrides

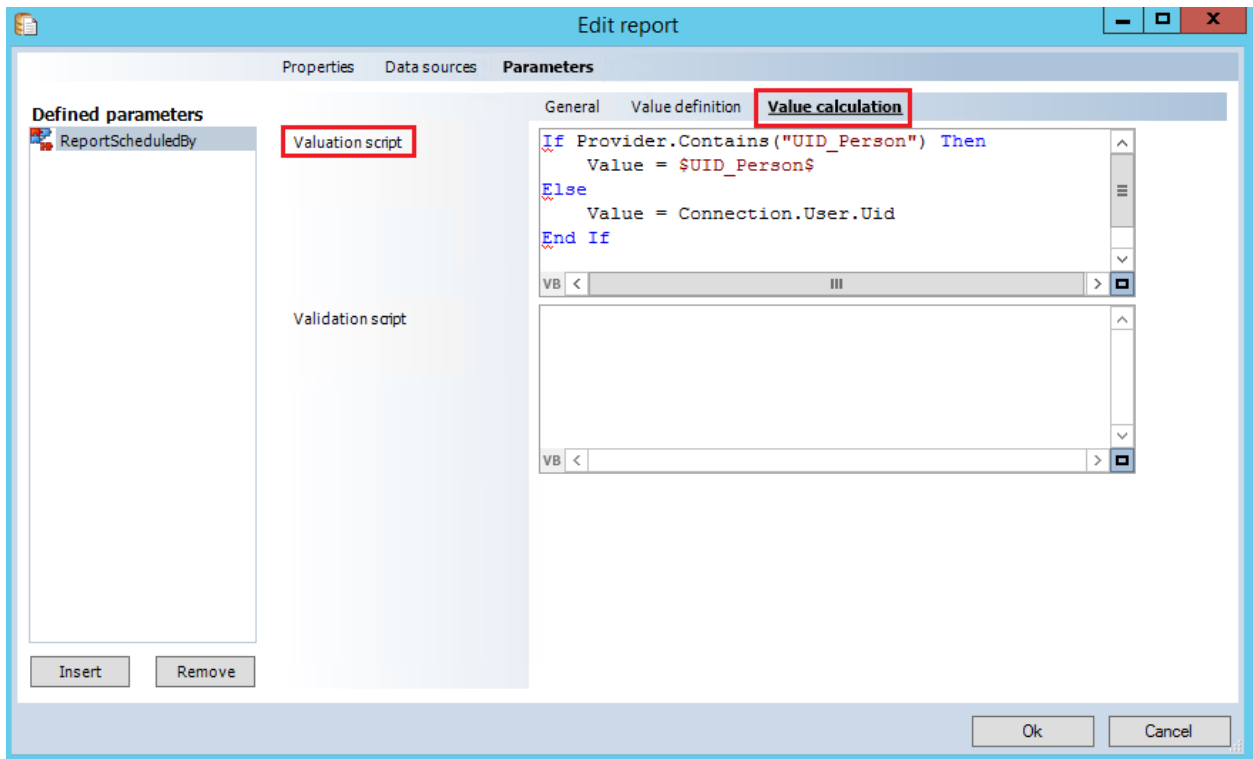
Sample value:

Default value: LDS User Recertification

Insert Remove

Ok Cancel

Value definition tab – Data source supports “None / Table / List of permitted values”.



Value calculation table – Valuation script generates the value of parameter at runtime.