

Custom Report

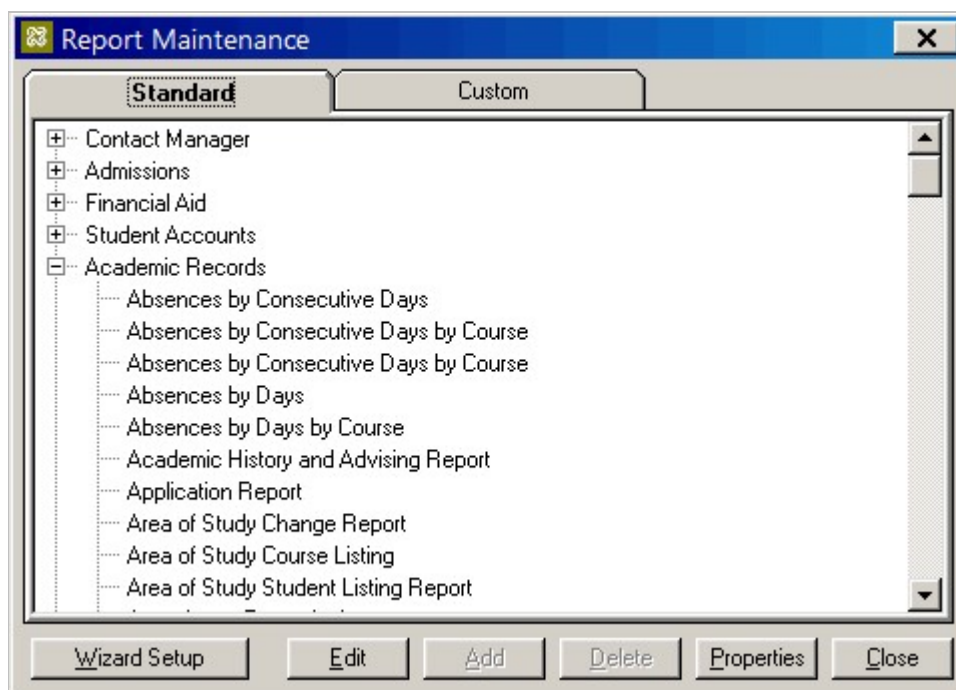
Setup > Report Maintenance

Crystal Reports software enables you to maintain and customize CampusNexus Student reports. You can change the layout of a standard report to add, move, or remove data from the reports. Your customized reports can be added to the Reports menu. When you modify a standard report, you make a copy of it and save it as custom report. The standard report is not modified.

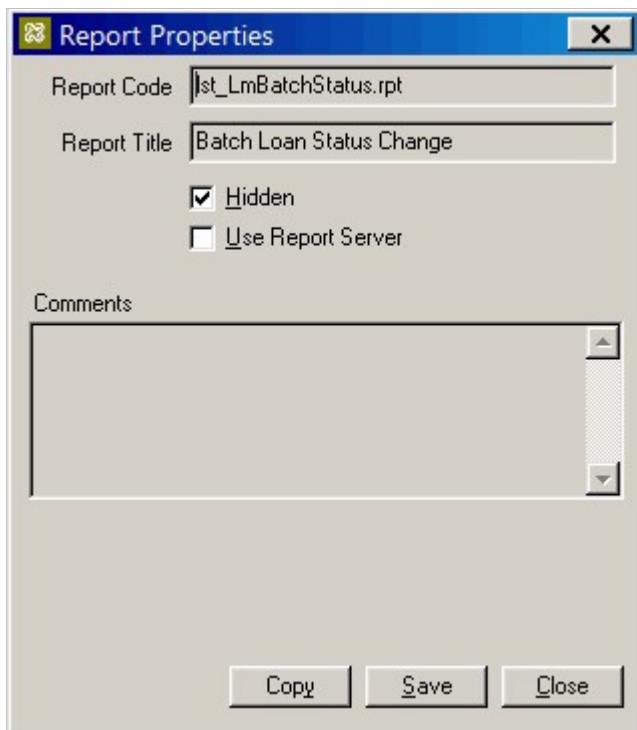
Note: The System Administrator must set up security rights to view, print, or export reports. [Staff members and staff groups](#) must be given [security rights](#) to view, print, and/or export reports. This does not apply to [custom reports](#).

To prepare a report for customization:

1. Navigate to **Setup > Report Maintenance**. The Report Maintenance form is displayed. Select the **Standard** tab.
2. Click  to expand the appropriate report module.



3. Double-click a report. The Report Properties form is displayed.

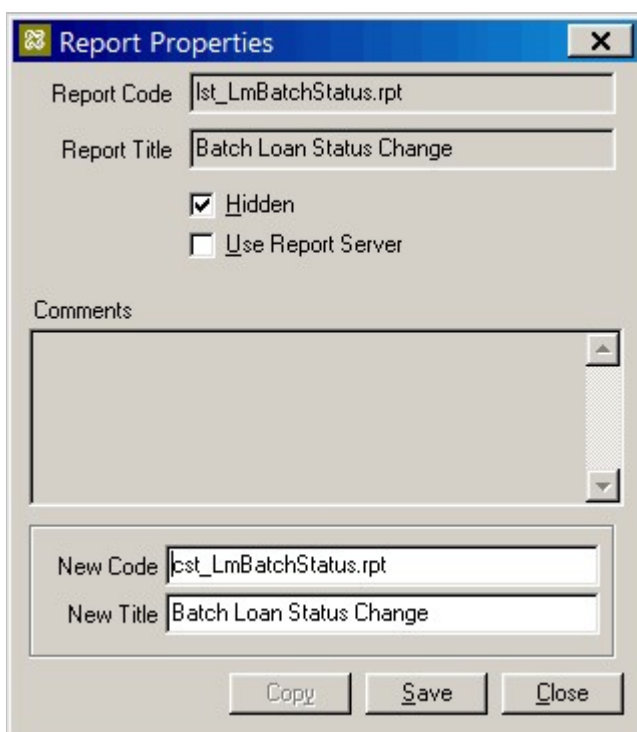


The 'Report Properties' dialog box is shown. It has a title bar with a close button. The 'Report Code' field contains 'lst_LmBatchStatus.rpt'. The 'Report Title' field contains 'Batch Loan Status Change'. There are two checkboxes: 'Hidden' is checked, and 'Use Report Server' is unchecked. Below these is a 'Comments' text area. At the bottom are three buttons: 'Copy', 'Save', and 'Close'.

4. To remove the report from the Reports menu, select **Hidden**.
5. To automatically send the selected report to your alternative server, select **Use Report Server**.

Note: The Report Server must be set up under [Setup > Campus Locations > Campus Information > Options](#).

6. Click **Copy**. The New Code and New Title fields appear at the bottom of the form. The New Code prefix `cst_` marks the report as a custom report.



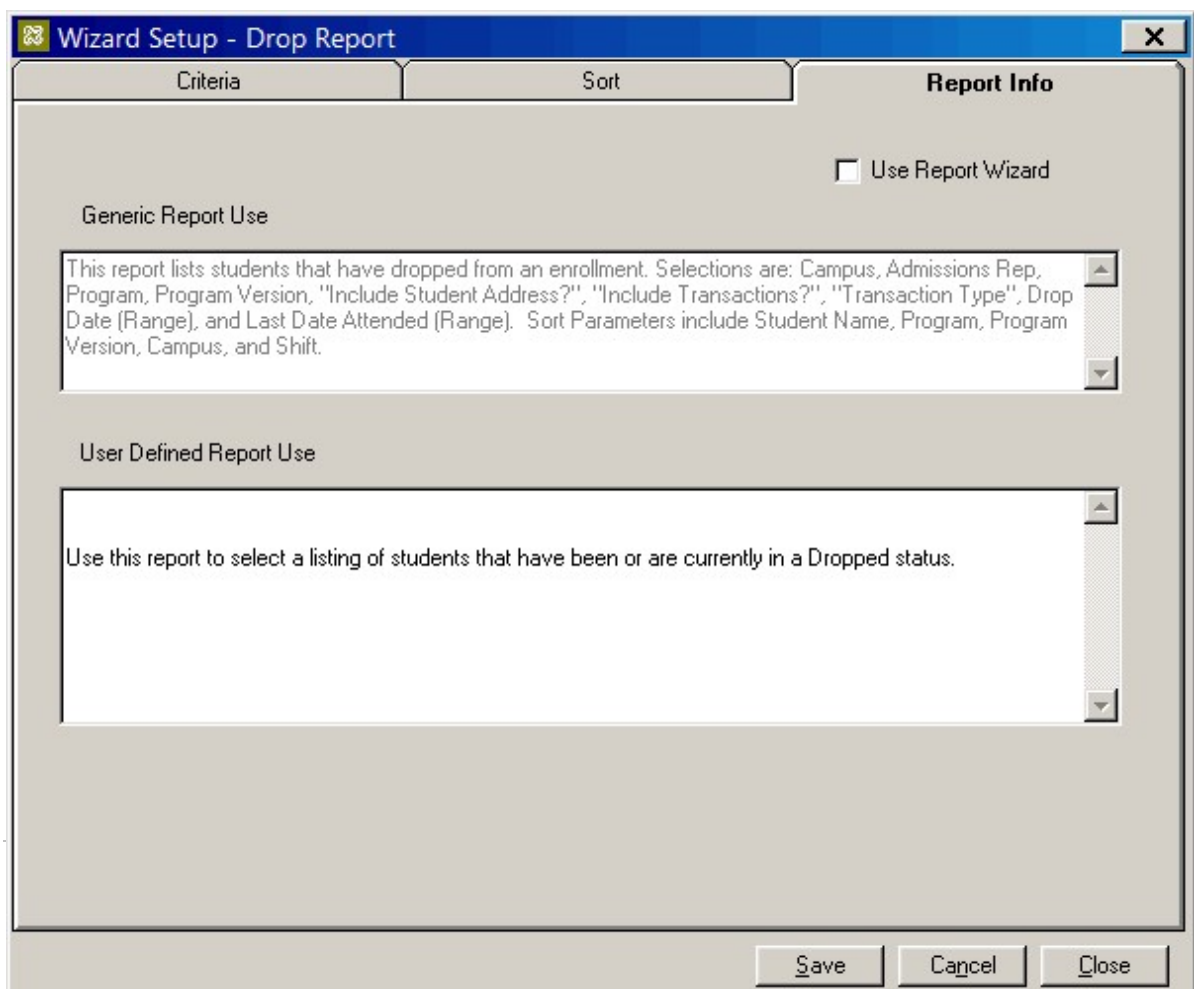
The 'Report Properties' dialog box is shown again, but now it includes two additional fields at the bottom: 'New Code' and 'New Title'. The 'New Code' field contains 'cst_LmBatchStatus.rpt' and the 'New Title' field contains 'Batch Loan Status Change'. The other fields and buttons remain the same as in the previous image.

7. Modify the **NewCode** and **NewTitle** as needed. **Important:** To put the report in **Contact Manager** menu, you must save the New Code begin with "cst_cm". To put the report in **Admissions** menu, you must save the New Code begin with "cst_am". To put the report in **Financial Aid** menu, you must save the New Code begin with "cst_fa". To put the report in **Student Accounts** menu, you must save the New Code begin with "cst_sa". To put the report in **Academic Records** menu, you must save the New Code begin with "cst_ad". To put the report in **Distance Education** menu, you must save the New Code begin with "cst_de". To put the report in **Career Services** menu, you must save the New Code begin with "cst_pl". To put the report in **Loan Management** menu, you must save the New Code begin with "cst_lm". To put the report in **Student Services** menu, you must save the New Code begin with "cst_ss". To put the report in **Custom Reports** menu, you must save the New Code begin with "cst_cu".

8. Click **Save**. The report is saved. You can modify the custom report with Crystal Reports software.

To add a custom report to the Report Wizard:

1. Navigate to **Setup > Report Maintenance**. The Report Maintenance form is displayed.
2. Click  to expand the appropriate report module.
3. Highlight a report and click **Wizard Setup**. The Wizard Setup form for the selected report is displayed.



Wizard Setup - Drop Report

Criteria Sort **Report Info**

☐ Use Report Wizard

Generic Report Use

This report lists students that have dropped from an enrollment. Selections are: Campus, Admissions Rep, Program, Program Version, "Include Student Address?", "Include Transactions?", "Transaction Type", Drop Date (Range), and Last Date Attended (Range). Sort Parameters include Student Name, Program, Program Version, Campus, and Shift.

User Defined Report Use

Use this report to select a listing of students that have been or are currently in a Dropped status.

Save Cancel Close

4. On the Report Info tab, select the **Use Report Wizard** check box.
5. In the **User Defined Report Use** box, specify the information that you want to be displayed at the top of the Wizard when the report is run.
6. On the Criteria tab, from the Available Criteria list, select the item that you modified in your custom report and specify a **User Defined Statement** for that item. Repeat this step for each modified item.

Wizard Setup - Drop Report

Criteria Sort Report Info

Available Criteria

- Campus Group
- Determination Date
- NSLDS WDR/WL Date
- Last Day Att
- Adm. Rep**
- Include Student Addr?
- Include Transactions?
- Transaction Type

Default Values

- ☒ All
- ☐ Able Baker
- ☐ Andrew Mellon
- ☐ Dave Stephenson
- ☐ Dee Beancounter
- ☐ Diane Lewis
- ☐ Electronic Leads
- ☐ Eli Mutzfetter
- ☐ James Astor
- ☐ James Pitt
- ☐ Jim Joyce

☐ Required

Filter

User Defined Statement - Adm. Rep

Select the admission representative

Rule - Adm. Rep

Type the first letter of the admission representative's last name in the Name field and click Load Criteria

Save Cancel Close

When the Report Wizard is run, the last name filter is displayed as shown below.

Report Wizard - Drop Report

Use this report to select a listing of students that have been or are currently in a Dropped status.

Report Preference

Preference Name

Select the Admission Representative.

Last Name

Adm. Rep

Type the first letter of the admission representative's last name in the Name field and click Load Criteria.

Step 4 of 10

- On the Sort tab, select a variable in the **Sort Variable** list and click to move the variable to the Default Sort Order list.

The screenshot shows a dialog box titled "Wizard Setup - Drop Report" with a close button (X) in the top right corner. The dialog has three tabs: "Criteria", "Sort", and "Report Info". The "Sort" tab is currently selected. Inside the "Sort" tab, there are two main sections: "Sort Variables" and "Default Sort Order". The "Sort Variables" section contains a list box with "Program Version" and two buttons, ">>" and "<<". The "Default Sort Order" section contains a list box with the following items: "Campus", "Program", "Shift", "Student Name", "Campus", "Program", "Shift", and "Student Name". Below these sections, there are two text areas: "User Defined Statement - Campus" and "Rule - Campus", each with a scroll bar on the right. At the bottom of the dialog, there are three buttons: "Save", "Cancel", and "Close".

8. Click **Save**.
 9. A confirmation message is displayed. Click **OK**.
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