

Sharing a Report Definition

Article Number

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Information

What is a Report Definition?

A report definition is an outline of what is to be included in a report, time period(s) data is to be pulled from, and how the results are to be organized and displayed.

Users with admin report privileges have the ability to create and edit a report definition(s). Once a report definition has been created, users have the ability to share that definition with subunits by clicking the option to "Share this report with all sub-units." In doing so this allows users with admin or viewer report permissions to generate the report for their specific unit.

This is useful if you have an annual report that should follow a specific format. Rather than having each unit attempt to create their own outline, simply share your report definition and have users in other units run it. In doing so, each unit will be supplied with data for their specific unit outlined and organized in the format you supplied.

Shared Report Definition & Date Ranges

An option exists in the report definition to either narrow your results to a specified time period or see results across all time. If you have shared this report definition with sub-units it is important to know the needs of those utilizing the report definition as it relates to time.

In many circumstances, those making use of your shared report definition will want to adjust the date range to narrow their scope of focus. Users that have admin report access can simply go in and adjust the date range within the settings of the report definition. However, users that have view-only access do not have the ability to make edits to a report definition and therefore cannot adjust the date range.

In order to allow users with viewer permission to adjust the date range of your report definition you will want to perform the following steps:

- Select "Restrict results to specific dates" and provide a start and end date.
 - If the option to change the start and end date have been enabled, but no default start and end date have been provided, users will not be given the option to customize the report date range.
- Enable "Allow dates to be changed when this report is generated."

Results Display

Hide fields that do not have any data

Start and End Dates

- All time periods
- Restrict results to specific dates

Start Date

2017-07-01

End Date

2018-06-30

- Allow dates to be changed when this report is generated.
- Filter Related Items by these dates.

And that's it, now when you share your report users will be able to customize the date range right from the report list, as shown below.

The screenshot shows the Planning system interface for Demo University. The main content area displays a report list for the 'FY 2018 / INSTITUTIONAL STRATEGIC PLAN'. The report '2017-2018 Unit Strategic Plan Summary' is highlighted, and the 'Customize Dates' button is circled in yellow. The interface includes a left sidebar with navigation options like 'My Units' and 'Institution', and a top navigation bar with 'Plan Items', 'Reports', and 'Documents' tabs. The 'View Report: 6/30/17 - 6/29/18' link is also visible.

Once a user clicks on the "Customize Dates" button they will be brought to the screen below where they are able to adjust the date range. It is important to know when users customize their date range using this option it will not change the default date within the report definition itself.



UNIT REPORT

Custom Report Date Range

2017-2018 Unit Strategic Plan Summary

Date Range
Adjust the start and end dates and click, View Report

Start Date: 2017-07-01

End Date: 2018-06-30

[Cancel](#) [CSV Report](#) [View Report](#)

KB Product

Planning

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Title

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