

Unite Education Program v9.0

Job Aid: 5664

Add a Report Condition to Unite

In Unite, reports and report conditions are separate. You can add and edit report conditions, then select any condition for any report. Once you add a report condition to Unite, you cannot delete the condition. The steps to add a report condition differ depending on whether you want to add a condition from scratch or copy and add a condition from a similar condition.

To add a report condition from scratch

1. Log on to Unite.
2. Click REPORTS.
3. Navigate to a report grid.


Note

You can access export reports on the *Exports* tab and Word reports on the *Word* tab.

4. In the **Report Name** column, click any report to open the *Report Builder* window.
5. Click the *Condition* tab.
6. Click .
7. In the **New Condition List Name** text box, enter a name for the new condition.
8. Click .
9. Add at least one field to the condition.

Note

Available fields come from person and application records and are organized into sections based on the area in Unite where each field is located. You can search by typing the field name in the **Search Available** text box. As you type, the number of available fields decreases.

10. If you add more than one field and want the fields to be in a specific order, click  and drag each selected field to the correct position.

Note

The order of the fields for the condition does not change the order of the fields for a report.

11. If you want to delete a selected field from the condition, click  next to the field.

Note

If you delete a field by mistake, there is no undo and you must add the field again.

12. Configure options for each selected field.

Note

If you plan to use the condition for a custom report, a scheduled report, or a report that runs in the background, do not select the **Ask** check box for any field in the condition.

13. Click  .

14. Run the report or click  to close the *Report Builder* window.

To copy and add a report condition

1. Log on to Unite.
2. Click REPORTS.
3. Navigate to a report grid.




Note

You can access export reports on the *Exports* tab and Word reports on the *Word* tab.

4. In the **Report Name** column, click any report to open the *Report Builder* window.


Note

If there is a report that uses a condition similar to the condition you want to add and the report has already been run, there should be a link in the **Condition Name** column to open the condition on the *Report Builder* window.

5. Click or verify you are on the *Condition* tab.
6. From the **Condition Name** list box, select or verify the condition you want to copy.
7. Click  .
8. In the **New Condition List Name** text box, enter a name for the new condition.
9. Click  .
10. If you want to add a field, select the check box for the field in the *Available Fields* list. Then click  .


Note

Available fields come from person and application records and are organized into sections based on the area in Unite where each field is located. You can search by typing the field name in the **Search Available** text box. As you type, the number of available fields decreases.

11. If you want to reorder selected fields, click  and drag each field to the correct position.

Note

The order of the fields for the condition does not change the order of the fields for a report.

12. If you want to delete a selected field, click  next to the field.

Note

If you delete a field by mistake, there is no undo and you must add the field again.

13. Configure options for each selected field.

Note

If you want to use the condition for a scheduled report or a report that runs in the background, do not select the **Ask** check box for any field in the condition.

14. Click  .

15. Run the report or click  to close the *Report Builder* window.

Related resources

- 5805 - About Field Options for Reports and Conditions
- 5662 - Copy and Add a Report to Unite