

Education Program v9.0

Job Aid: 5800

Edit Fields for Reports and Report Conditions

Each report in Unite has a report definition that includes fields that appear on the report and at least one field for a report condition. The field configuration determines the report output. At any time after adding a report to Unite, you can change the report definition to generate a different report output. Reports and report conditions are separate in Unite. Because you can select a condition for any report, edits you make to a report condition field impact any report that uses the condition. The steps to edit fields differ depending on whether you want to edit fields that appear on a report or edit fields for a report condition.

To edit fields for a report

1. Log on to Unite.
2. Click REPORTS.
3. Navigate to the grid that contains the report you want to edit.



Note

If you want to edit an export report, click the *Exports* tab. If you want to edit a Word report, click the *Word* tab.

4. In the **Report Name** column, click the name of the report.
5. In the **Report Name** text box, edit the name if needed.
6. If you want to add a field, select the check box for the field in the *Available Fields* list, and then click **Add Field** .

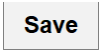

Note

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.

7. If you want to reorder selected fields, click  and drag each field to the correct position.
8. 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.

9. Configure options for each selected field.
10. Click  .
11. Click  to close the *Report Builder* window.

To edit fields for 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.

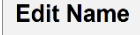


Note

If there is a report that uses the condition you want to edit 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 edit.


Note

Conditions can be selected for different reports, so be aware when you update fields for a condition that it may impact other reports.

7. If you want to edit the condition name, click . In the **Edit Condition Name** text box, enter the new name. Then click .
8. 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.

9. 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.

10. 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.

11. Configure options for each selected field.

Note

If you plan 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.

12. Click  .

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

Related resources

- 5805 – About Field Options for Reports and Conditions
- 5661 – Add a Word Report to Unite
- 5663 – Add an Export Report to Unite