

# Chapter 4.05: Custom Reports Menu


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## Introduction

Route Manager supports a variety of custom reporting tools (e.g., Crystal Reports) to allow more flexibility for reporting purposes. Once these reports are created, the Custom Reports option gives you the ability to integrate these types of reports into the Route Manager Reports menu. This may be helpful for users that would benefit from having certain external reports accessible from within the Route Manager program (links to programs can be added as well).

Follow the steps in this chapter for detailed instructions on adding your own report or program to the menu.

## Creating an Entry for the Menu

1. Browse to **Lists>Custom Report Groups**.
2. Choose **Add** 
3. Create a **Menu Title**
4. Select a **Shortcut Character**
5. Enter or Browse for the folder that contains your custom report(s), program(s), etc.
6. Add the **Security Level Code(s)** required for viewing the Custom Report(s).



7. Click **Save**.  
Repeat these steps for each Custom Report Group that you will need. Continue to the next section to learn how to control the items that are displayed within each group.

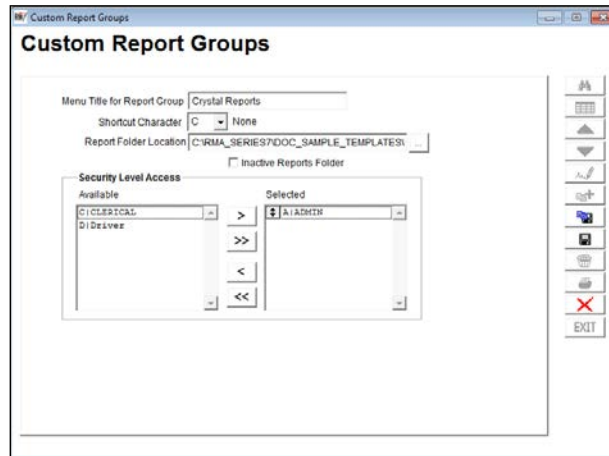
## Establishing Links

You will need to create shortcuts to the reports, programs, etc., you wish to add to the menu. You can achieve this by placing .lnk (shortcut) files within each Report Group Folder(s).

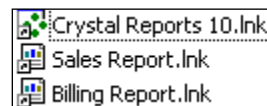
### EXAMPLE

The Report Group below will be used for links to the “Crystal Reports” group.

- All shortcut (.lnk) files placed in the **Report Folder**  
**Location:** Report Folder Location C:\RMA\_SERIES7\DOC\_SAMPLE\_TEMPLATES\ will be displayed under **Reports>Custom Reports>Crystal Reports** on the menu.

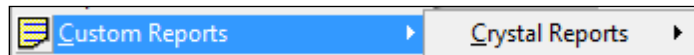


- Here is a list of shortcut (.lnk) files placed within the “D:\RMA\_SERIES7\DOC\_SAMPLE\_TEMPLATES” directory that we used in the example above:



We have included a link to the Crystal Reports program (Crystal Reports 10.lnk), and two custom reports (Sales Report.lnk and Billing Report.lnk).

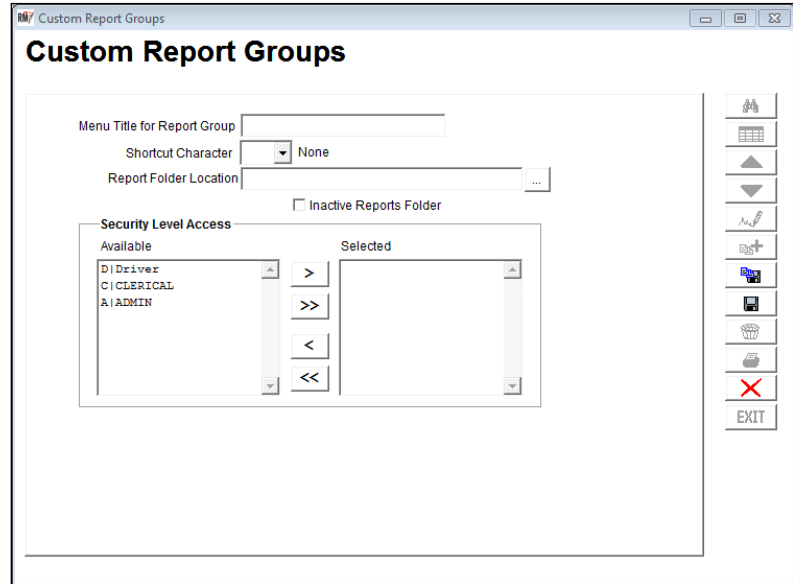
- Within the program, the links will be displayed under **Reports>Custom Reports>Crystal Reports**:



- Repeat these steps for all of the folders and shortcuts needed.

## Field Definitions – Custom Report Groups

This section contains the field definitions within the Custom Report Groups screen.



The screenshot shows a window titled "Custom Report Groups" with the following fields and controls:

- Menu Title for Report Group:** A text input field.
- Shortcut Character:** A dropdown menu currently set to "None".
- Report Folder Location:** A text input field with a browse button (...).
- Inactive Reports Folder:** A checkbox.
- Security Level Access:** A section containing two list boxes:
  - Available:** Contains "D|Driver", "C|CLERICAL", and "A|ADMIN".
  - Selected:** Currently empty.
  - Between the boxes are four arrow buttons: >, >>, <<, and <.

On the right side of the window, there is a vertical toolbar with icons for: Add, Edit, Delete, Print, Refresh, and Exit.

### Fields:

**Menu Title for Report Group:** This is the text that will appear on the Reports menu under Custom Reports.

**Shortcut Character:** You can choose a shortcut character from one of the letters in the Menu Title to enable quick access to your report group.

**Report Folder Location:** The path of where the folder that contains the shortcut files (.lnk) to your reports is located.

**Security Level Access:** Choose the Security Level Access that will be required to access the reports in this group.

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