

## Custom Reporting

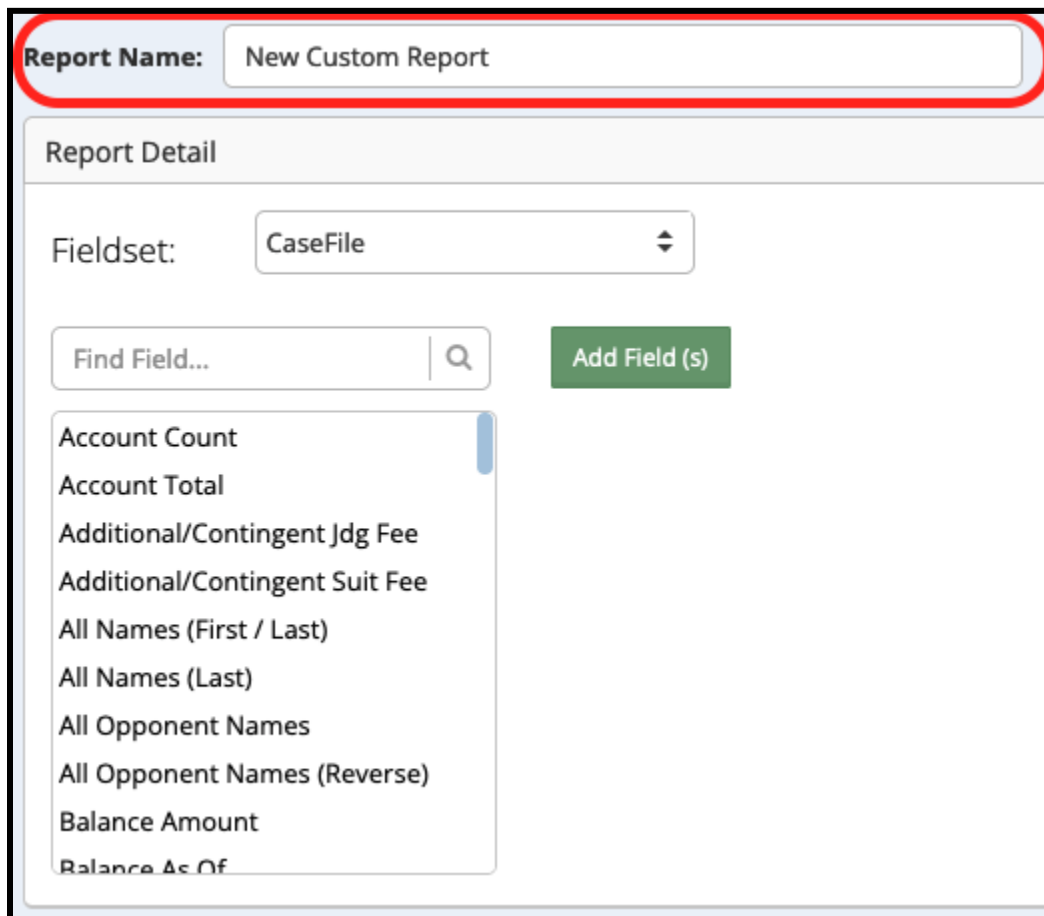
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### Overview

This document details how to create and execute custom reports in CMPOnline. Custom Reporting in Case Master is extremely robust and allows us to view and export nearly every field in the system. If for any reason there's a data field that you can't find, just let us know, and we'll be sure to add it.

### Creating a Custom Report

- Navigate to Tools > Custom Reporting.
- Click "Add New Report".
- Name the report using the Report Name field.

A screenshot of the Case Master software interface for creating a custom report. At the top, there is a text input field labeled 'Report Name:' containing the text 'New Custom Report'. This field is highlighted with a red rectangular border. Below this is a section titled 'Report Detail'. Under 'Report Detail', there is a 'Fieldset:' dropdown menu currently set to 'CaseFile'. Below the dropdown is a search box labeled 'Find Field...' with a magnifying glass icon. To the right of the search box is a green button labeled 'Add Field (s)'. Below the search box is a list of available fields, including 'Account Count', 'Account Total', 'Additional/Contingent Jdg Fee', 'Additional/Contingent Suit Fee', 'All Names (First / Last)', 'All Names (Last)', 'All Opponent Names', 'All Opponent Names (Reverse)', 'Balance Amount', and 'Balance As Of'.

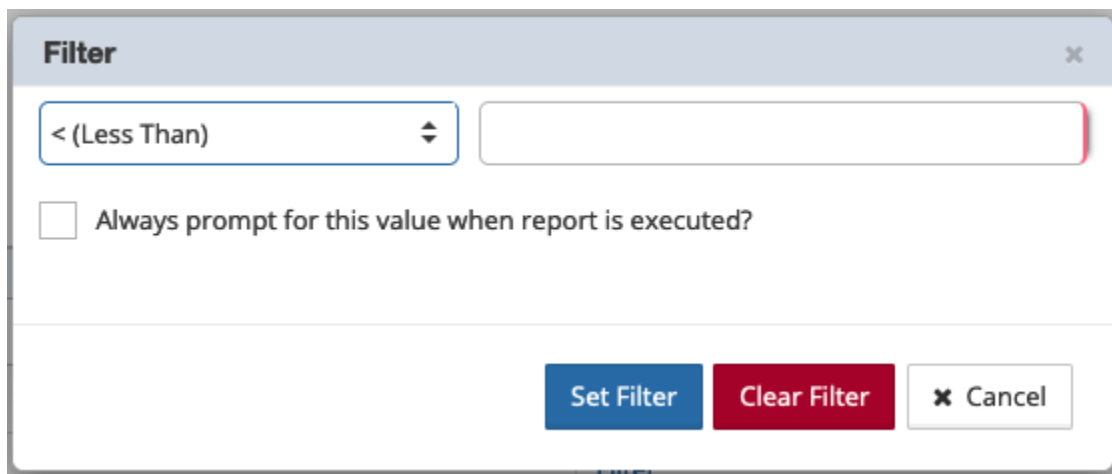
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- Select the fieldset of the field you wish to add.
- Double click on the field you wish to add.
- Repeat this for all fields you wish to add.

**NOTES:**

- *Field columns can be organized with a simple drag and drop motion.*
- *Field visibility can be turned off by pressing the settings cog and unchecking the field visibility option. This is useful if you want a field/filter on your report but not visible upon execution.*
- If you wish to filter on any fields, click Filter under the field you wish to filter.

A screenshot of a "Filter" dialog box. The title bar says "Filter" with a close button (X) on the right. Below the title bar, there is a dropdown menu showing "< (Less Than)" with a double-headed arrow icon. To the right of the dropdown is an empty text input field. Below these elements is a checkbox labeled "Always prompt for this value when report is executed?". At the bottom of the dialog, there are three buttons: "Set Filter" (blue), "Clear Filter" (red), and "Cancel" (white with a grey border).

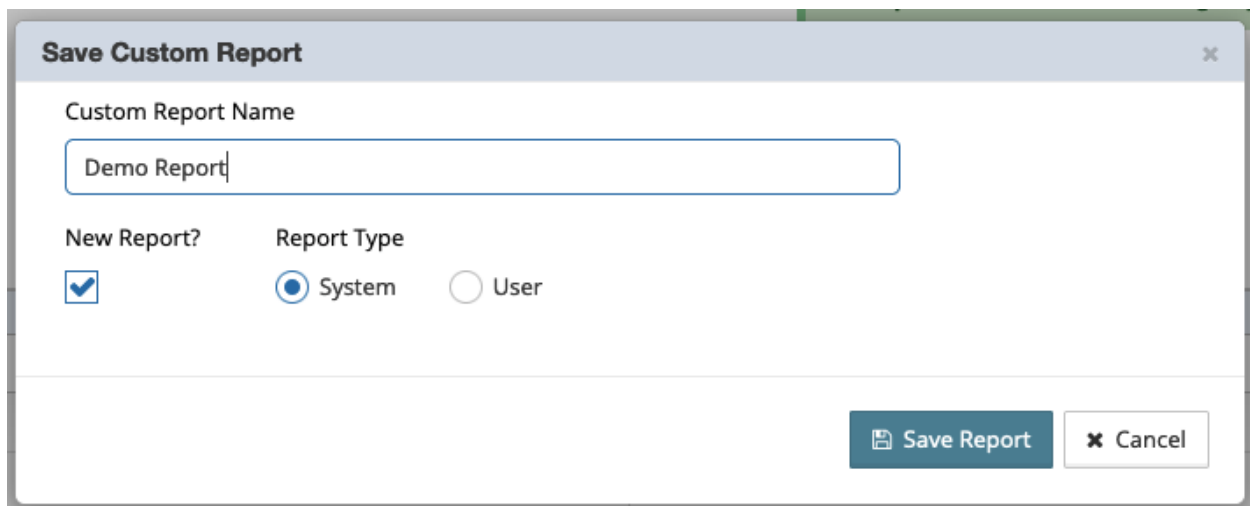
- Select how you wish to filter:
  - Less Than
  - Less Than or Equal To
  - Equal To
  - Not Equal To
  - Greater Than
  - Greater Than or Equal To
  - Between
  - Is Not Null
  - Is Null
  - Contains
  - Does Not Contain
  - Starts With
  - Ends With
  - In (List)
  - Not In (List)

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- Enter the filter value
- Click Set Filter.



- In the top right, click Execute.
- Review the report for accuracy, then click back and make any necessary corrections.
- Click Save.

A dialog box titled 'Save Custom Report' with a close button (X) in the top right. It contains a text input field for 'Custom Report Name' with the text 'Demo Report'. Below this are two sections: 'New Report?' with a checked checkbox, and 'Report Type' with radio buttons for 'System' (selected) and 'User'. At the bottom right are two buttons: 'Save Report' and 'Cancel'.

- Confirm the name of the report.
- Select whether it's a System or User Report.
- Click "Save Report".

### Questions?

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