



KReporter v3.0

Union Reporting

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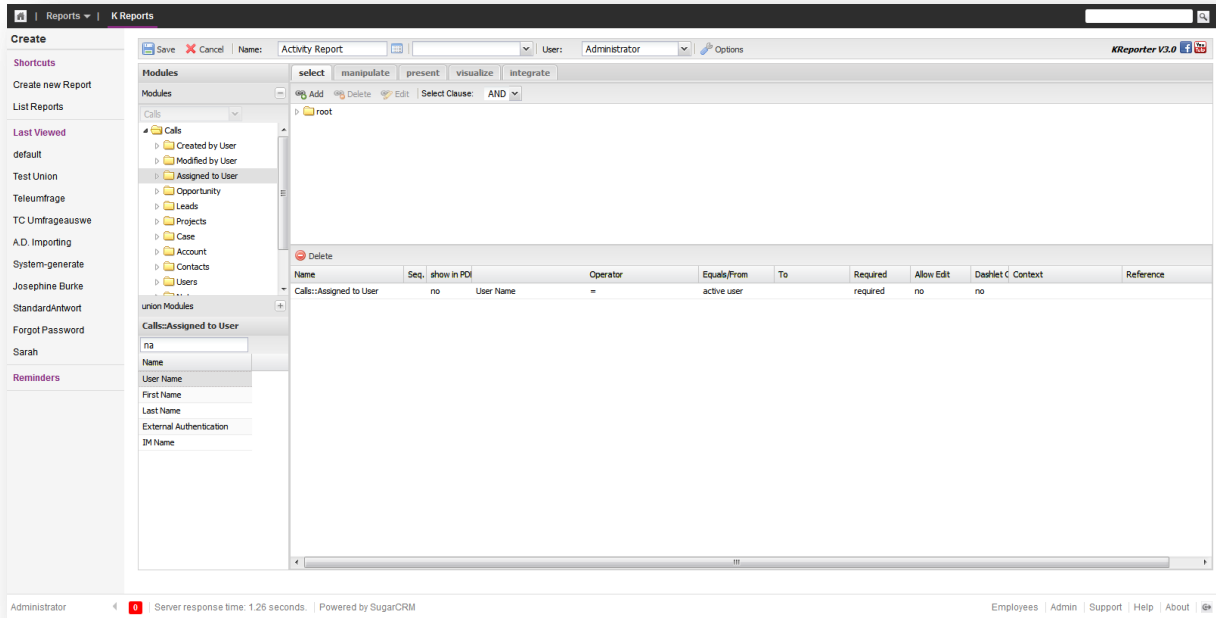
Basics about Union Reporting

SugarCRM is organized by modules (e.g. Accounts, Contacts, etc.) and uses a relational database behind that defines relationships between the individual objects. A basic report starts with one main module and defines the reporting logic where relational linked information can be pulled into a report and be displayed. In many case yet you want to report across modules. A Standard example is the activity report where in one report you want to combine Calls, Meetings and Tasks – in SugarCRM Terms 3 Modules.

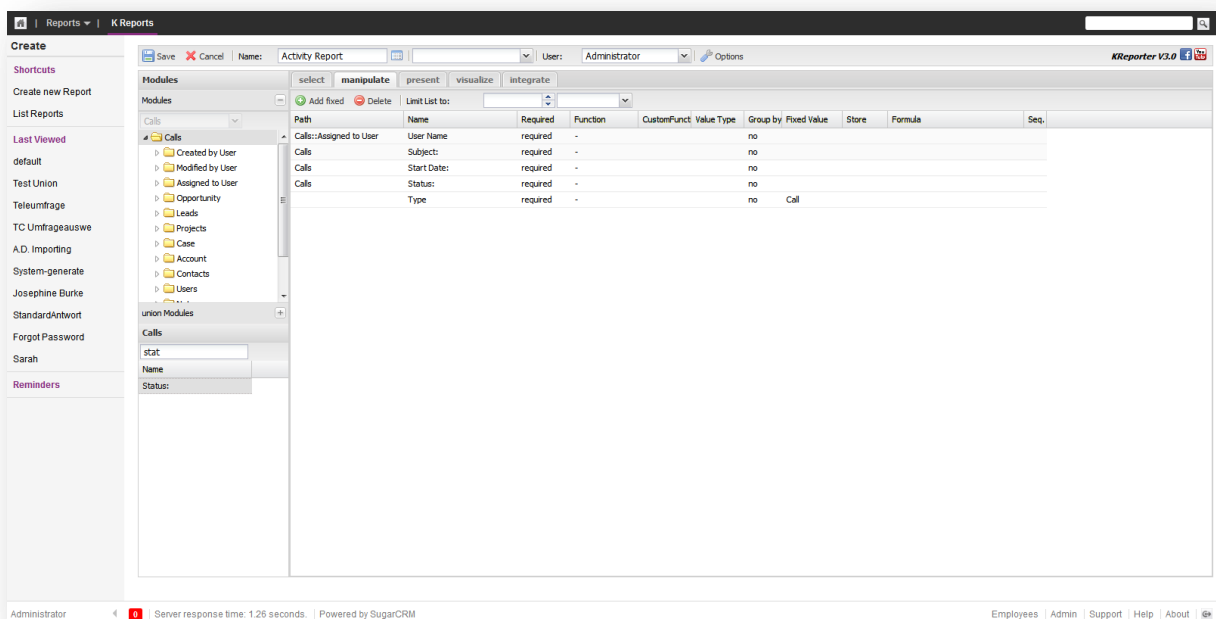
The KReporter allows this with the feature for Union Reporting.

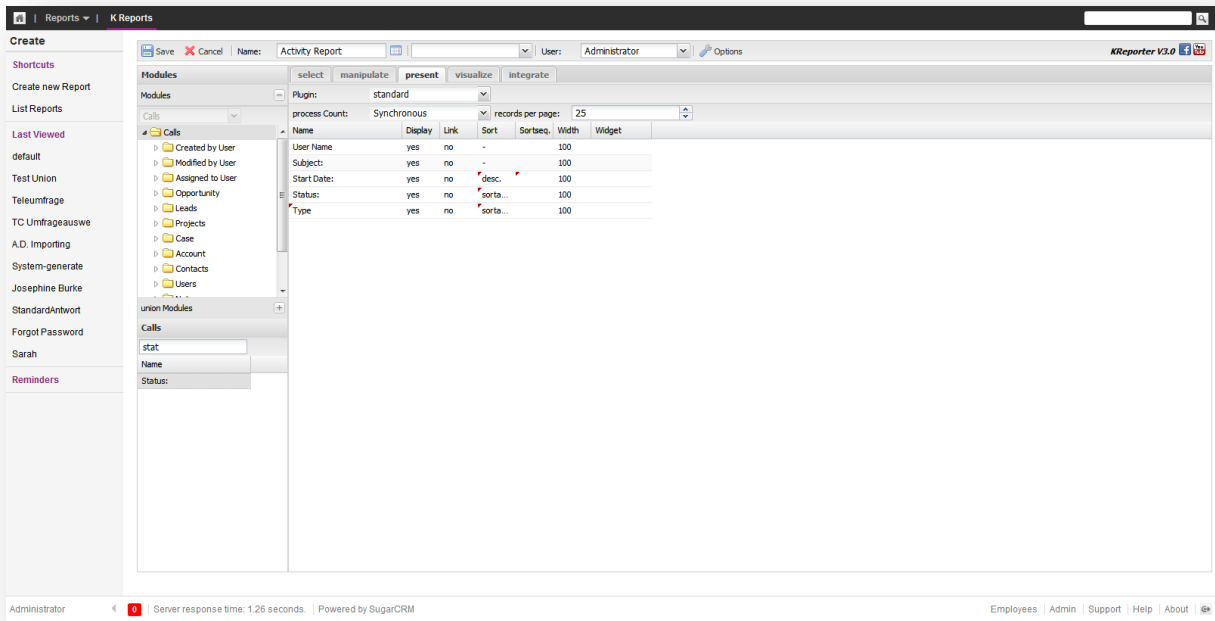
Creating your first Union Report

A Union Report as a base always requires a basic report. We are starting with a report on Calls. As basic Select Criteria we are using the assigned user and create the Filter setting it to the current user.

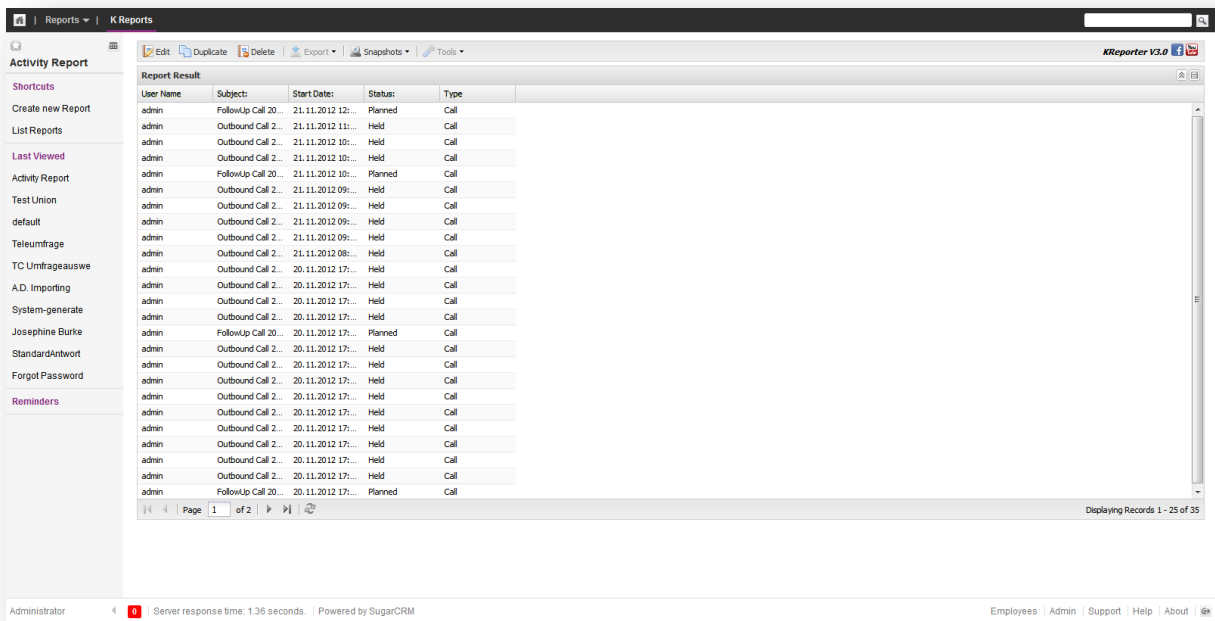


Next we add some fields. In our case I added the Assigned User Name, the Subject, the Start Date, the status. Furthermore I added a fixed field I called type with the value "Call" – so later on in the view we can identify the record.

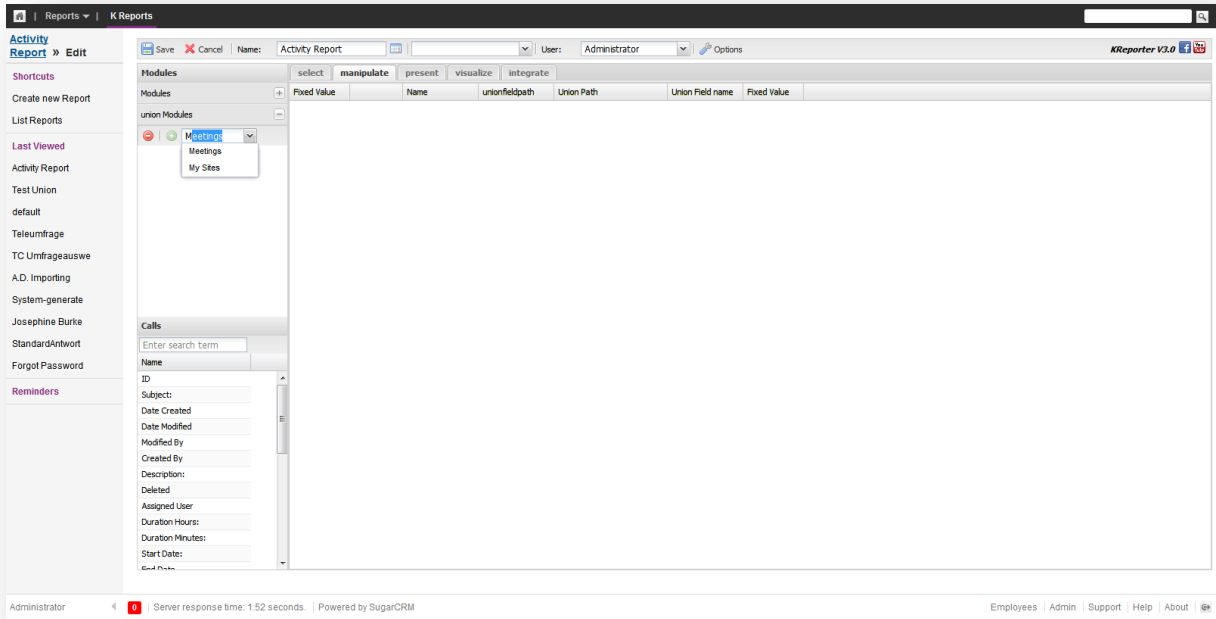




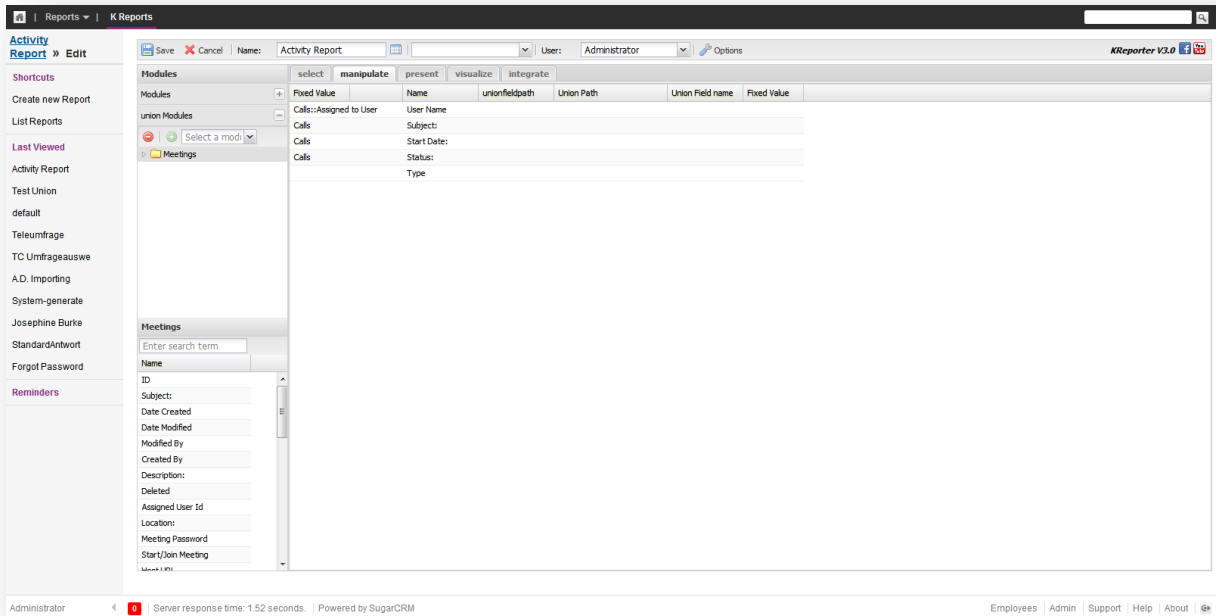
In the Presentation Panel we set the Sorting criteria to the Start Data descending and also allow sorting by status and type. If we save the report we get (as expected) a list of calls.



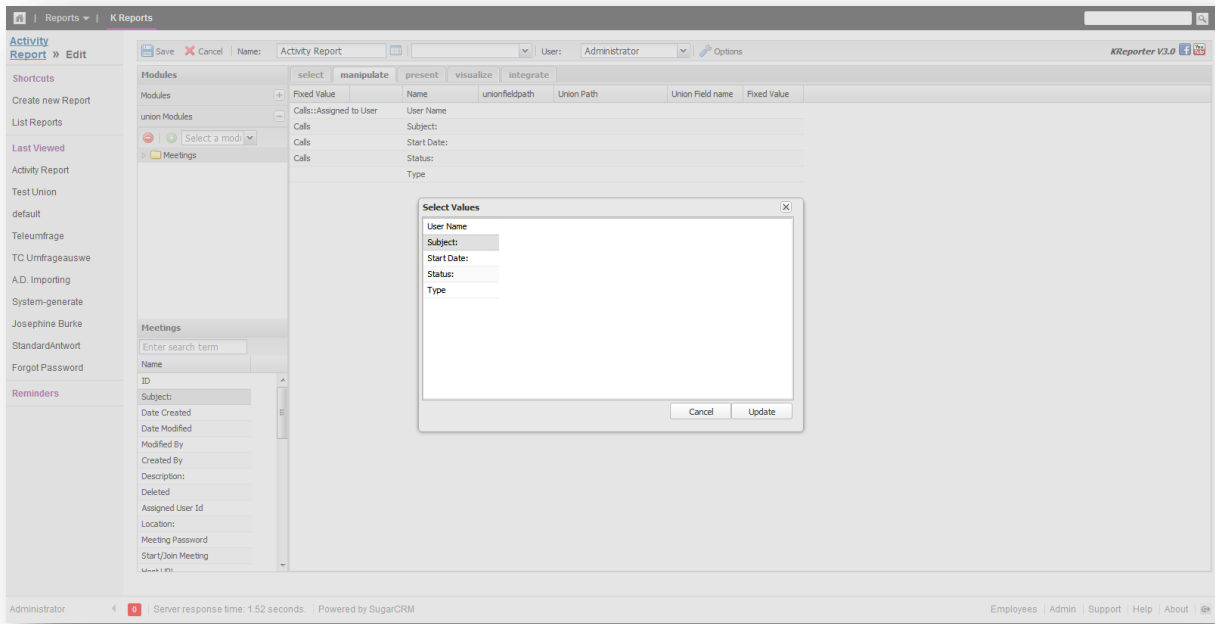
The next step is to edit the report and start adding the union modules. On the left upper tab (where the module tree is) open the "union Modules Tab". We can again select another module. Select Meetings in the Dropdown and then add the module with the 'plus' button.



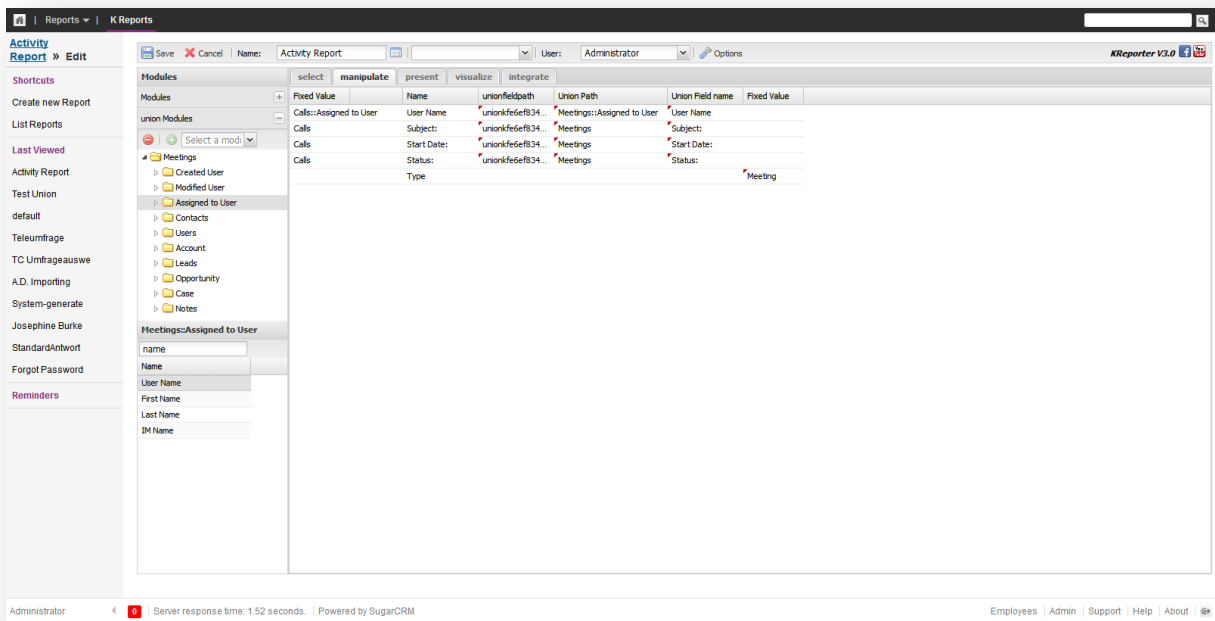
As a Result you see a slightly different view in the manipulation panel.



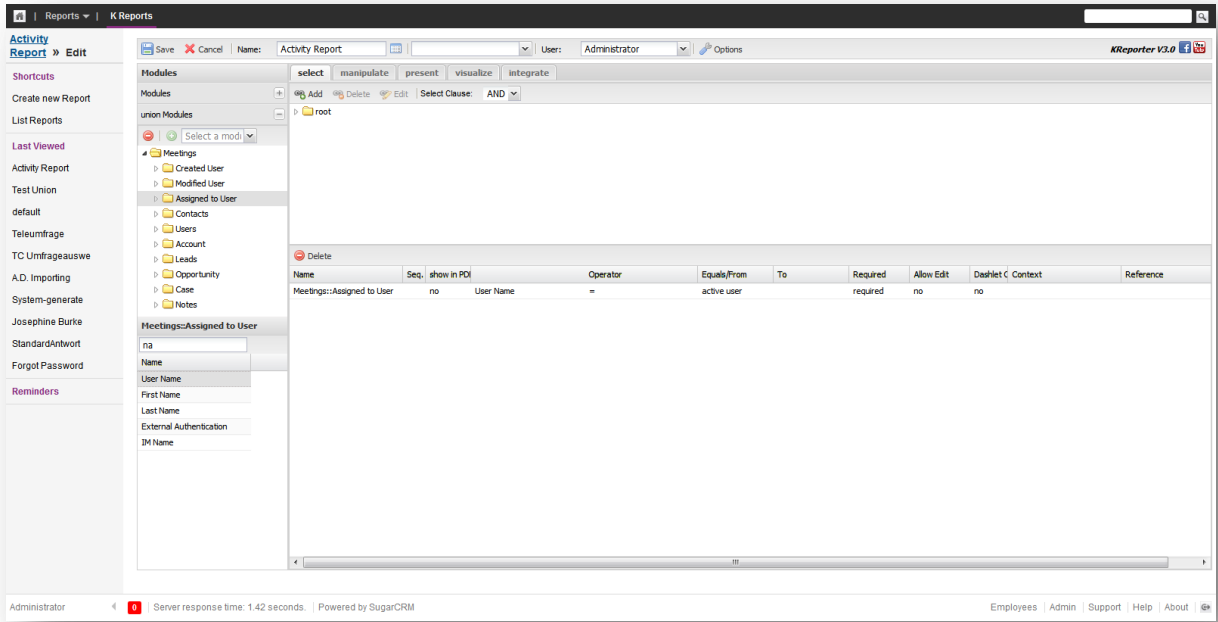
The Fields that are presented in the report are defined in the main section and here you only have limited options (you can e.g. not reorder the fields, or set grouping or custom functions etc.). If you now follow the basic procedure to select a fields from the module and drag it to the Manipulation Panel the Reporter will prompt you with a popup to map the field to an existing field in the listdefinition. Select the Field you want to map the field of this module from and push update. In our case we map the Meetings Subject to the Subject Field.



We follow that procedure for all other fields and as fixed value for the Field type we just write Meeting into the fixed value. The result looks as follows.



For each Union we can also set separate filter criteria. If you have a Union selected and then go to the select tab the tab is empty and you can define the filter criteria where we also for the union set the filter to the active user.



The Result is a report that has Meetings and Calls together in one List.

