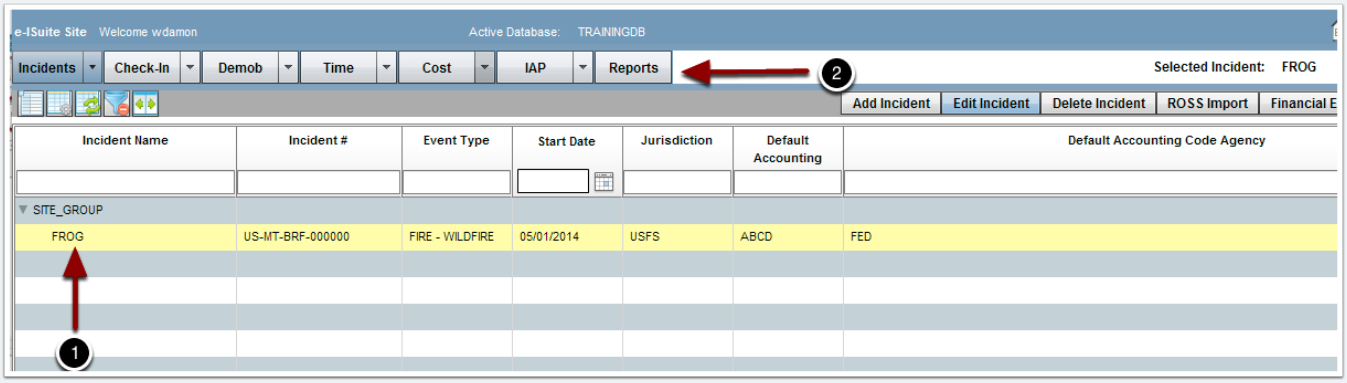
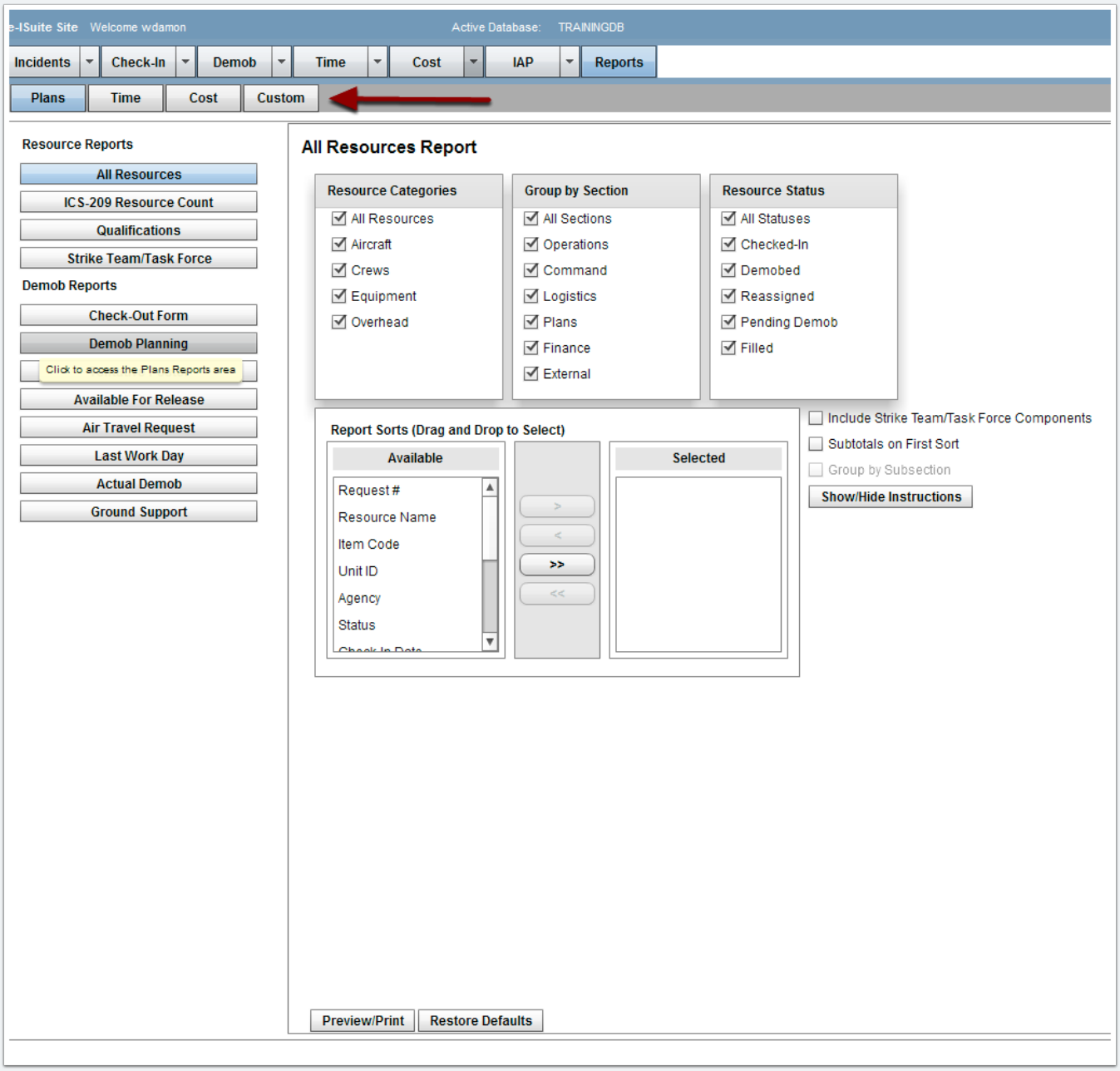
Producing an Aggregate Custom Report

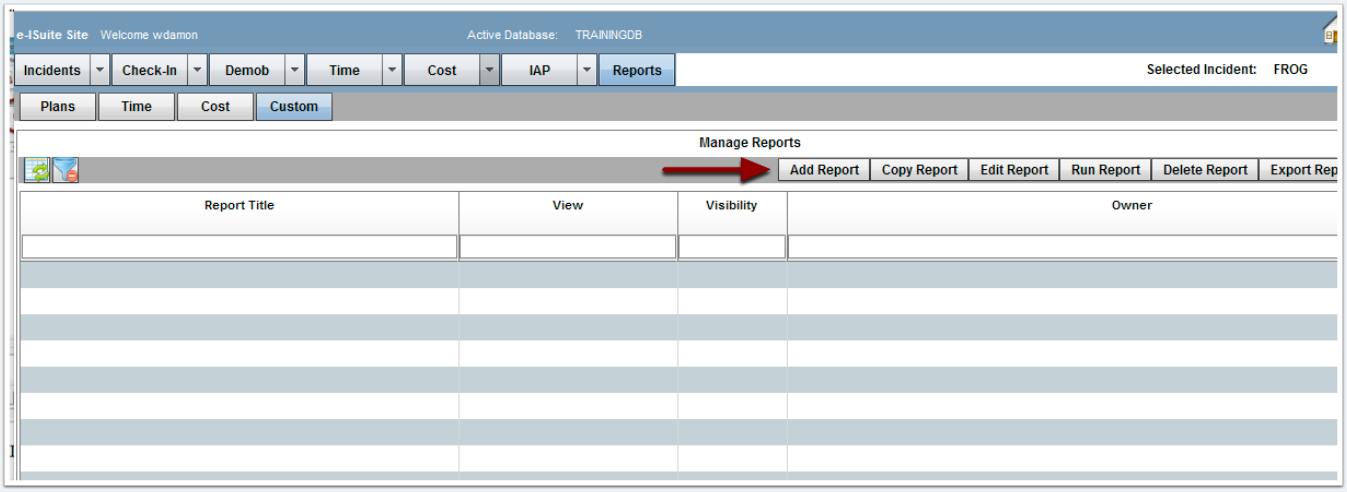
Step 1: Select an Incident or Incident Group and Click on Reports



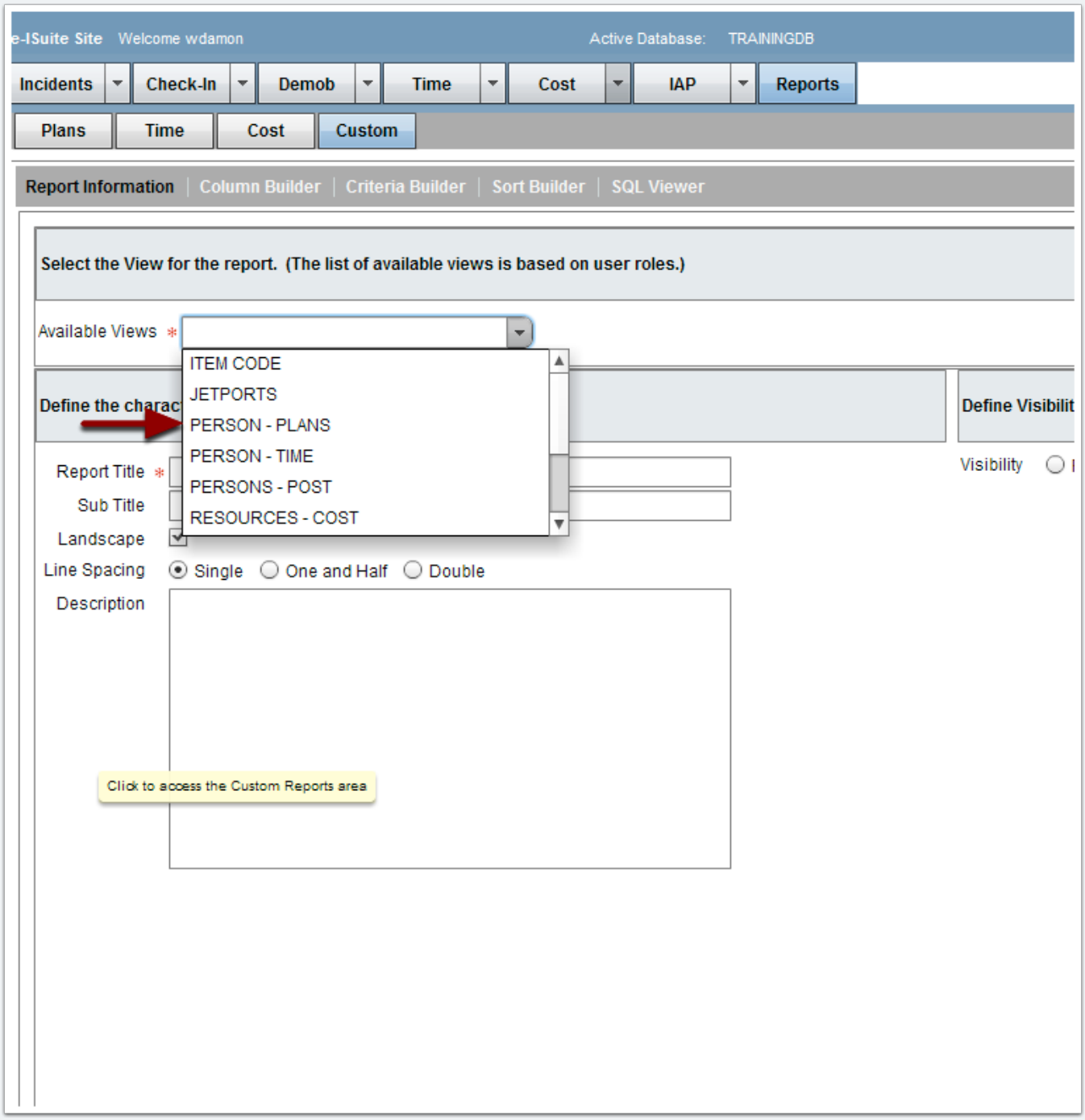
Step 2: Click on Custom



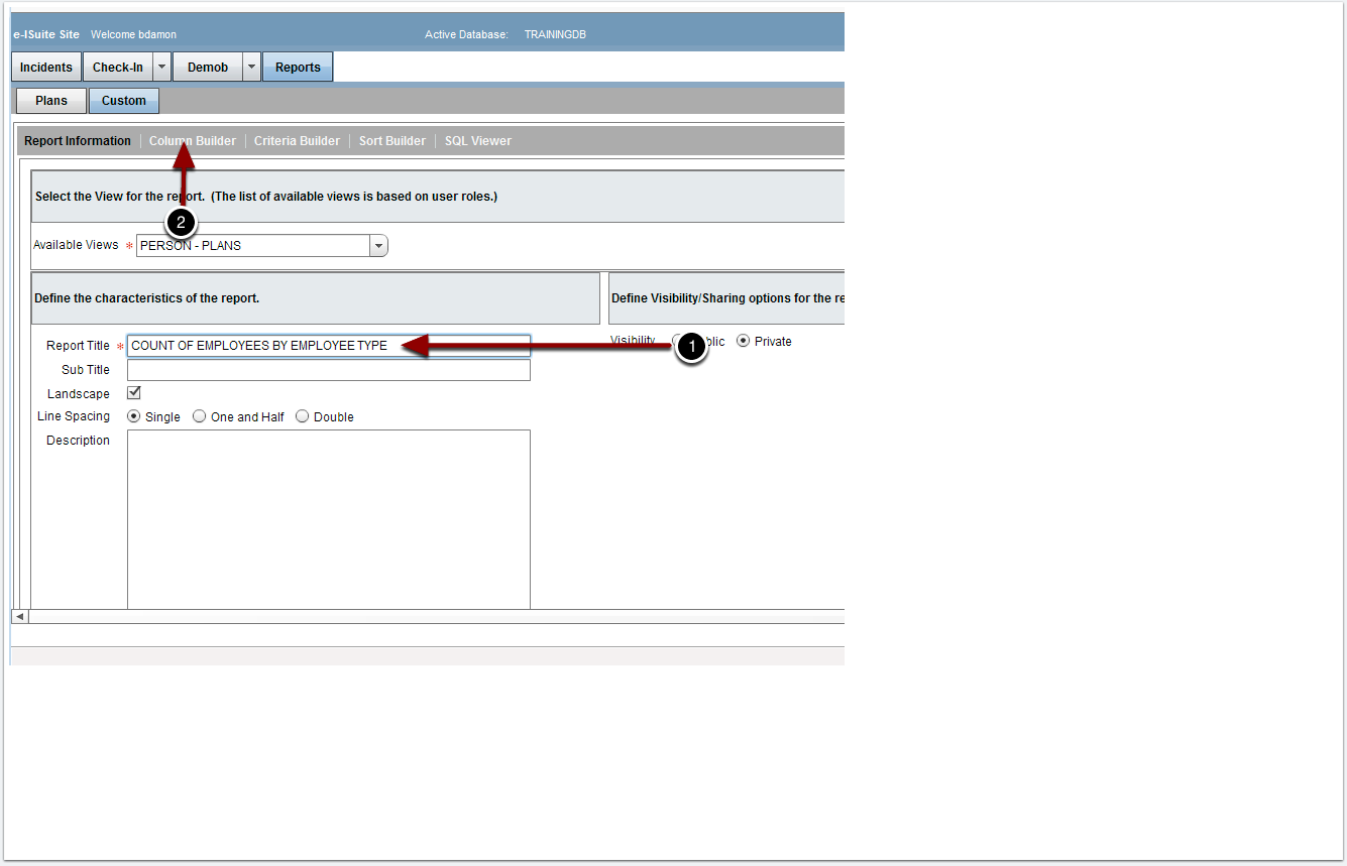
Step 3: Click on Add Report



Step 4: Select a View (in this case, PERSON - PLANS)

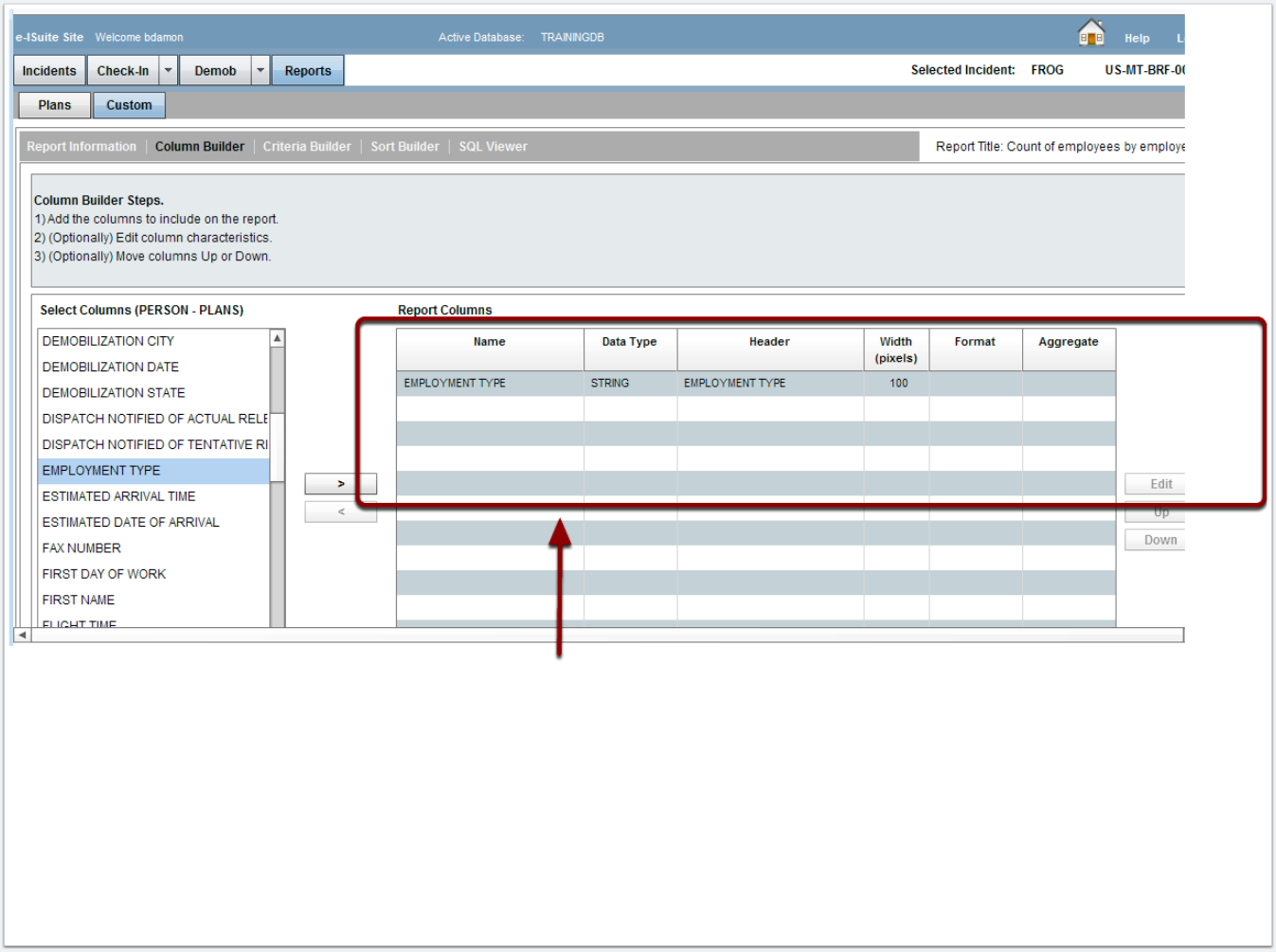


Step 5: Give the Report a Title and Click on Column Builder



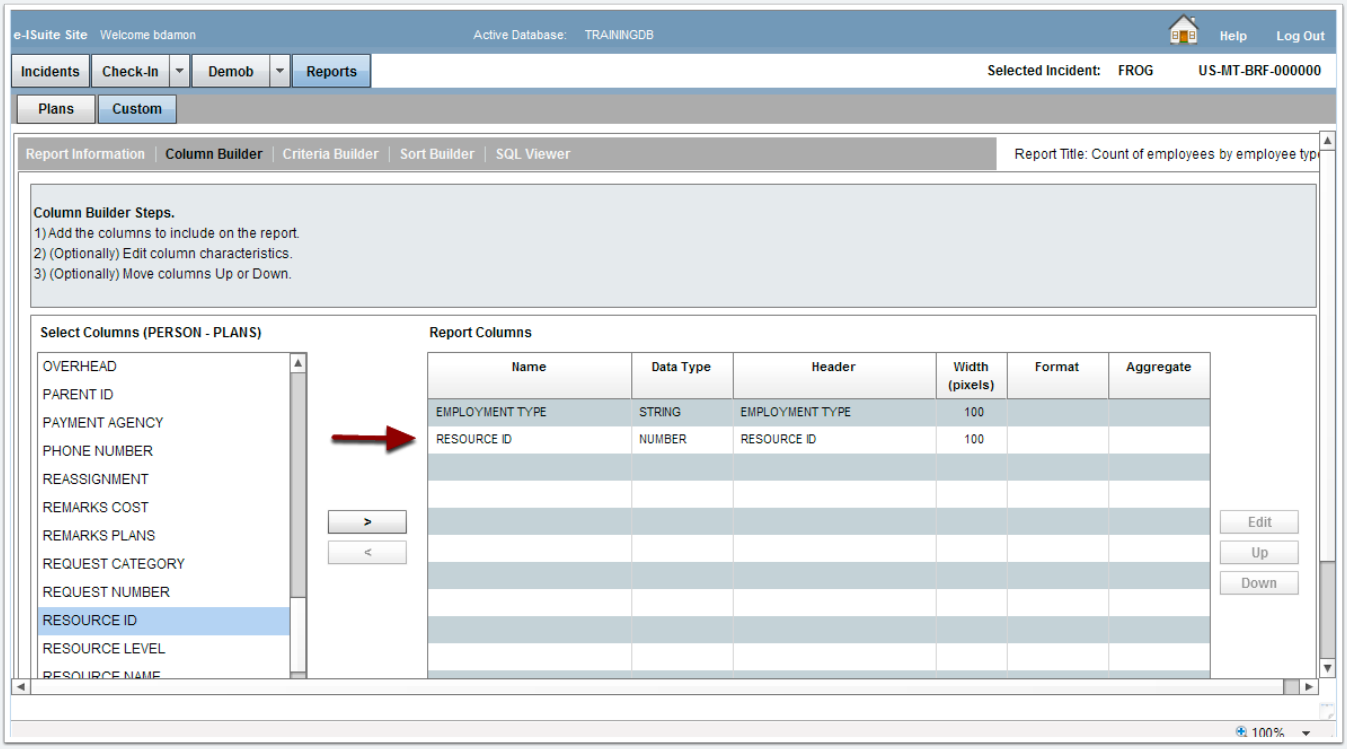
Step 6: Select the Column that the COUNT is to be grouped by.

In this case, the report is to count employees by EMPLOYMENT TYPE, so the first column to be included is EMPLOYMENT TYPE.



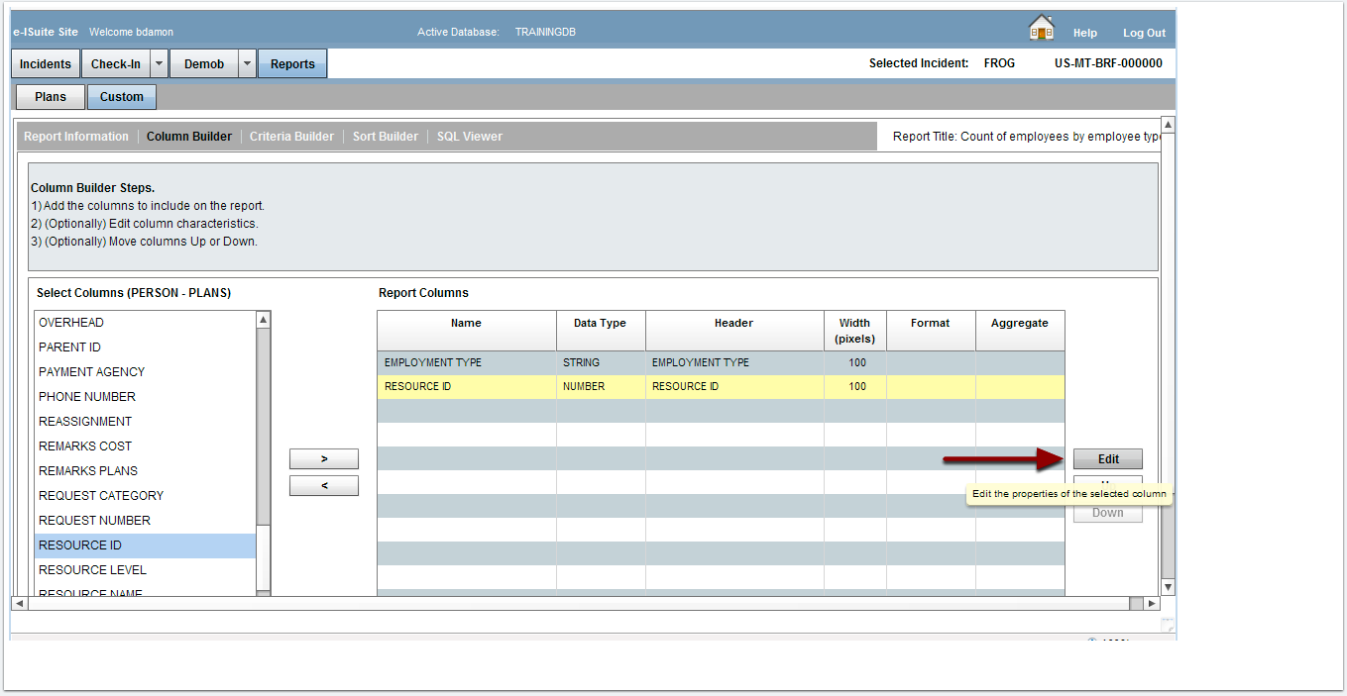
Step 7: Select the column that is to be counted.

When counting Resources, ResourceID is a good field to use because there is a unique ResourceID for every resource.



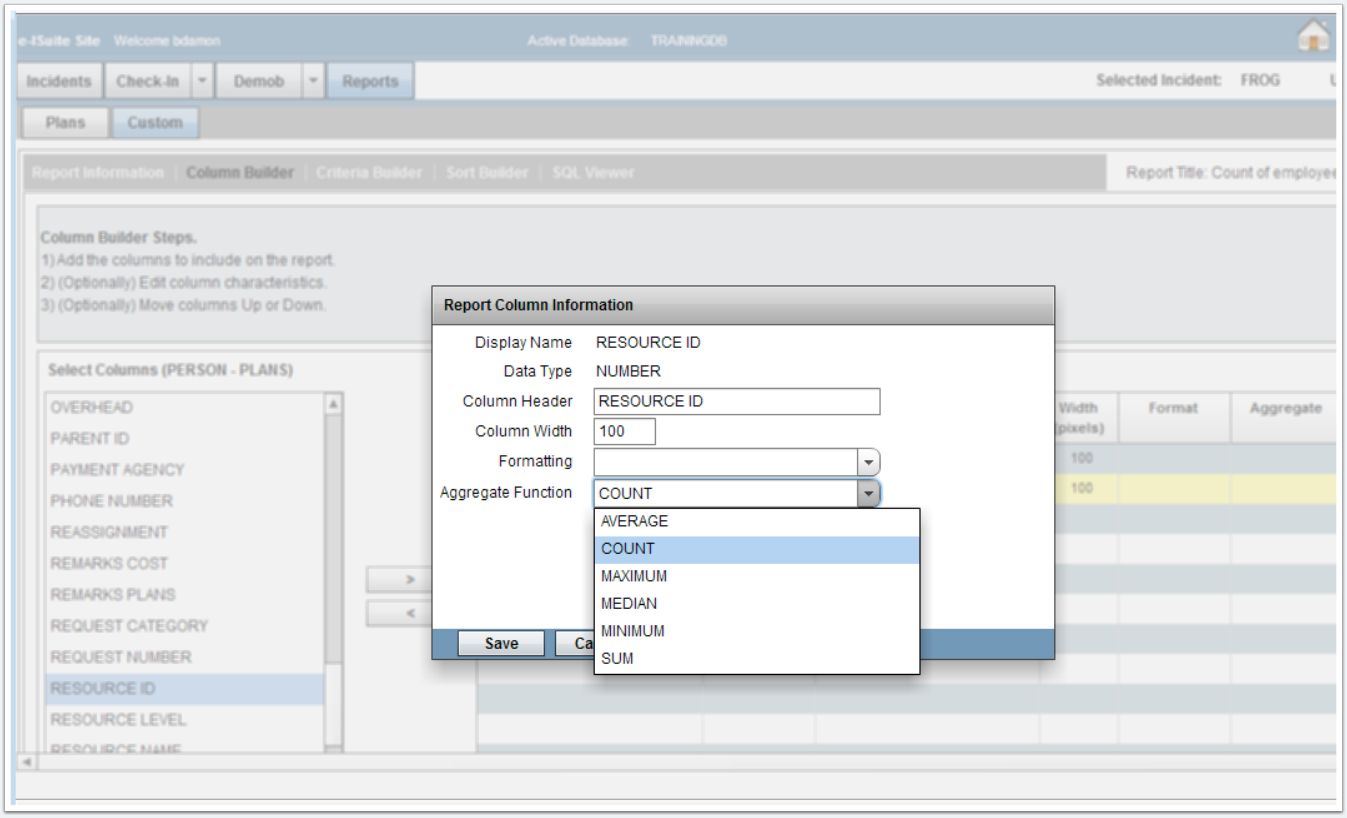
Step 8: Edit the Column that is to be counted

The Edit Function is where Aggregate Functions are set.



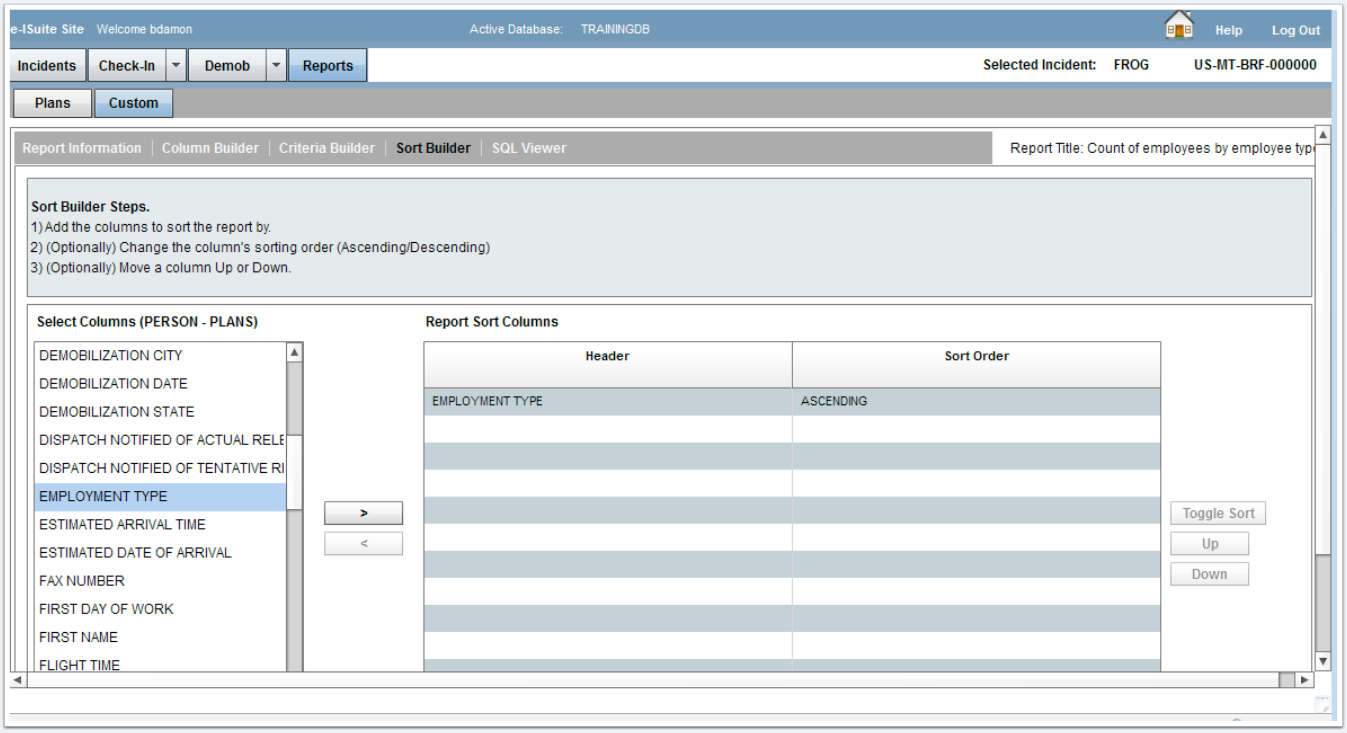
Step 9: Add the Aggregate Function to be used for the Column that is being counted

In this case, ResourceID is to be counted, so the Aggreate COUNT function is applied to the ResourceID Column.

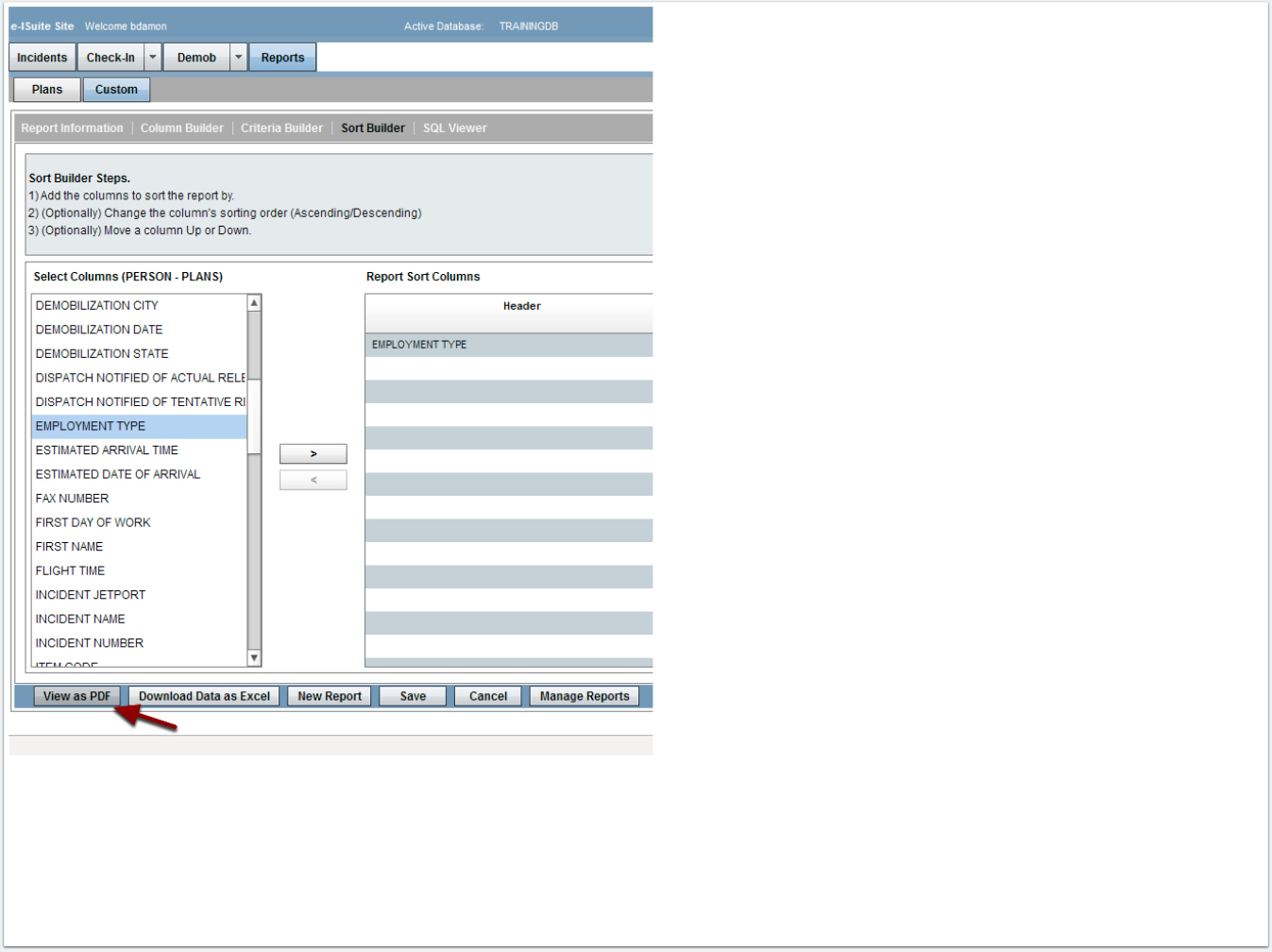


Step 10: Click on Sort Builder to Specify Sort by EMPLOYMENT TYPE

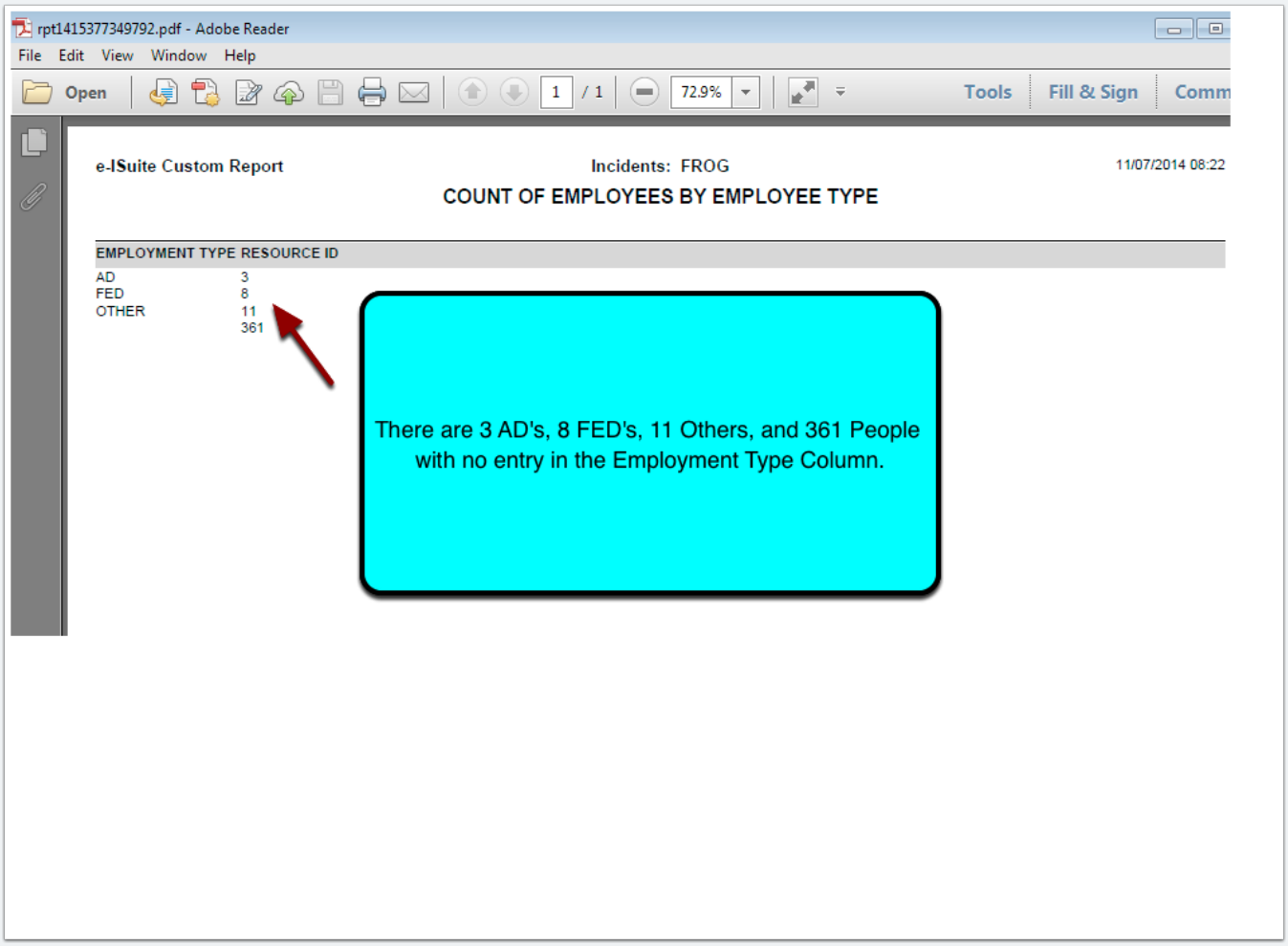
Note: Since this report is counting all employees by EMPLOYMENT TYPE, there is no criteria to specify, so the Criteria Builder Screen is left blank.



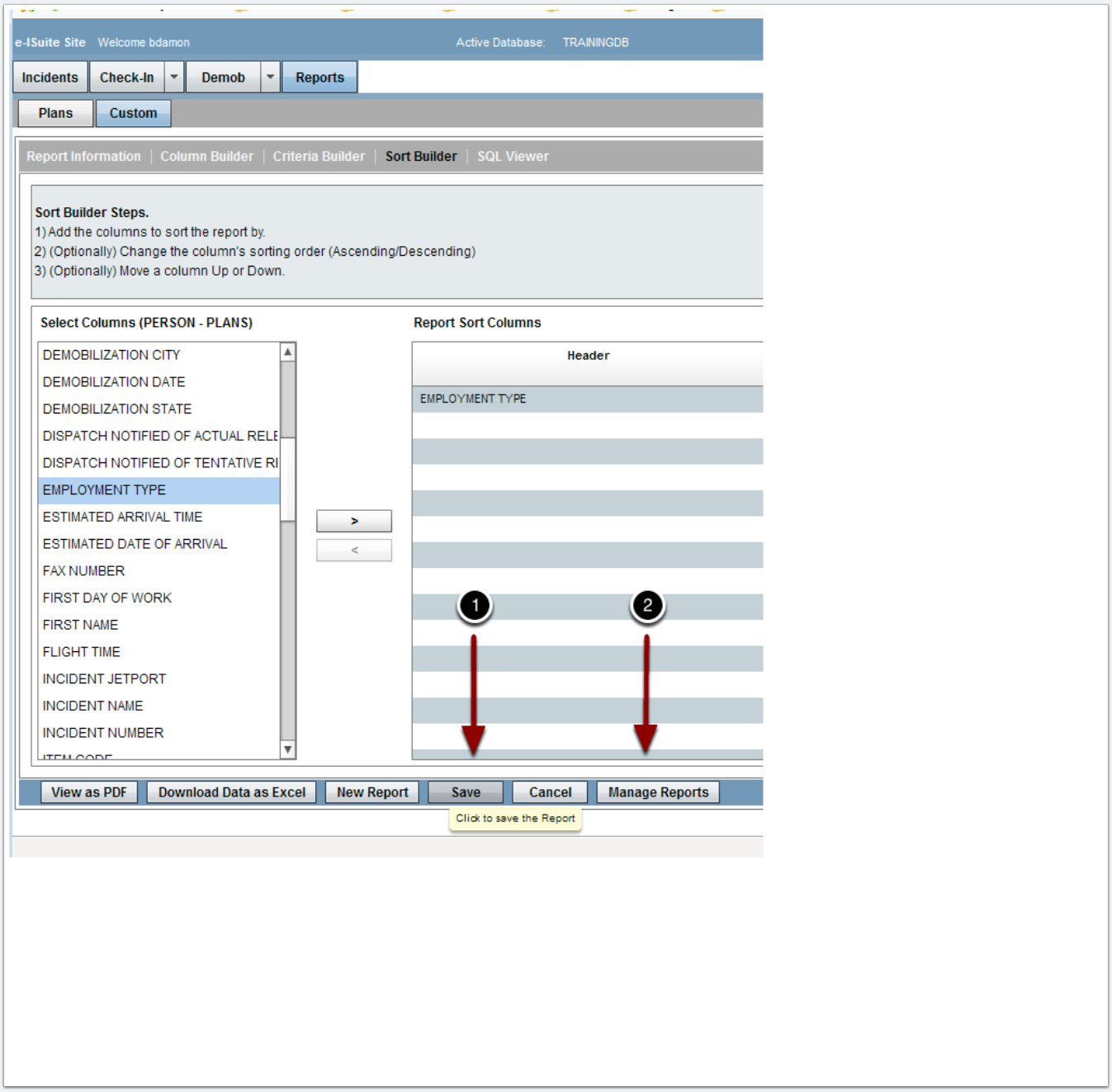
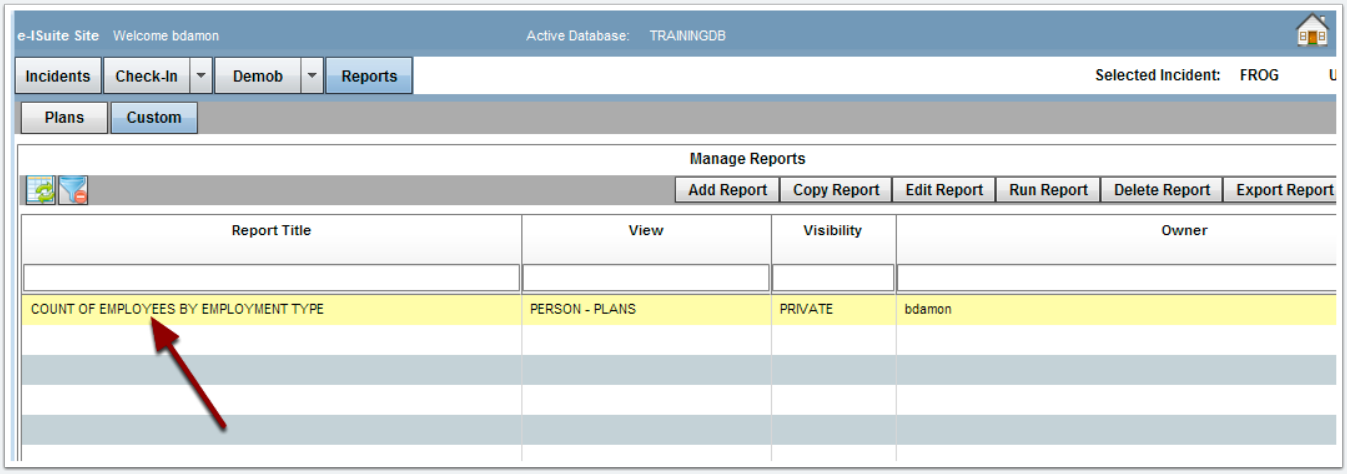
Step 11: Click on View as PDF to View/Print the Report



Step 12: View or Print the Report from the PDF Reader Application



Step 13: Save the Custom Report and Click on Manage Reports



Step 14: The Custom Report is saved as a Private Report with a Title of COUNT OF EMPLOYEES BY EMPLOYMENT TYPE