

Customizing a Sub Report

User Report Name and **User Report Code** are editable so you can rename and recode your report as you like. **Remarks** are useful for keeping notes about what the sub report is designed to do so I strongly using it.

SQL Code

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```
is_goal=1 AND program_name = 'Residential' AND (is_current=1 OR (is_current=0 AND (sp_status_description='Discontinued' OR sp_status_description = 'Achieved' OR sp_status_description = 'New/Initial') AND actual_date > DATEADD(MONTH, DATEDIFF(MONTH, 0, GETDATE())-1, 0)))
```

The **SQL Code** field allows you to add some customization to the SQL that is used to pull data into the subreport. From what I can tell, the SQL that you enter into this field executes as though it is the search condition of a **WHERE** clause in the SQL statement. This allows you to filter the results in a multitude of ways.

For example, a sub report related to services for a client would pull in all services for the client regardless of program so you may want to filter for a specific program. You can do that by using `program_name = 'My Program'` in the SQL Code box.

You might want to be more specific and select only services of a certain type so you could use `event_name = 'My Service'`.

You can create filters on any of the Report Fields available in the view and you can add complexity using **AND** and **OR** operators.

You can also use SQL Server functions. For example, if you want to get all of the services that have occurred within the last 3 months of today, you could use `actual_date > DATEADD(MONTH, -3, GETDATE())`

Report Fields

| Column Name | Data Type | Caption | Field Order | Sorted Column? | Order is descending? | Is Visible? | Join Field? | Overwrite Form Field to Join | Operator |
|-------------------------|-----------------------------------|----------------------|-------------|-------------------------------------|--------------------------|-------------------------------------|-------------------------------------|------------------------------|----------|
| people_id | Foreign Key ID [uniqueidentifier] | people_id | 1 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | |
| actual_date | Date Only[datetime] | Status Date | 2 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | actual_date | Equal |
| service_plan_details_id | Foreign Key ID [uniqueidentifier] | Goal | 3 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | |
| sp_status_description | Regular String[varchar(50)] | Status | 4 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | |
| sp_library_desc | Regular String[varchar(50)] | STO | 5 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | |
| item_number | Short Numeric[smallint] | STO# | 6 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | |
| brief_statement | Regular String[varchar(50)] | Short Term Objective | 7 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | |
| sp_det_target_date | Date Only[datetime] | Target Date | 8 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | |
| | | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | |

This sub form allows you to customize the look of the sub report on the form and also allows you to do some more filtering of the data based on the parent form fields.

Column Name

The Column Name is used to select which columns from the data source will be used in the subreport. When you click the build button for this field, you will be able to see all of the columns that have been included in this view by Netsmart. These are all of the columns that you can include in the report. The picklist popup will show you the column name and the data type for the column. Many of the columns that are included in the views are uniqueidentifier data type. These are the GUIDs that are used for primary keys in myEvolv's tables. These are not useful to be displayed but come into play if you want to filter data through a join.

Data Type

The Data Type allows you to display the data from the column in a different format. For the most part, you will want to display the data in your sub report using the same data type that the data is stored in. One place where this might be different is displaying a DateTime as Date Only if you do not wish to display the time.

Caption

The Caption allows you to determine the column header on the displayed sub report.

Field Order

The Field Order allows you to determine the order that the columns render in the sub report table.

Sorted Column

If this box is checked, the subreport will be sorted by this column in ascending order. If more than one column has this box checked in the subreport, the columns will be ordered in priority based on their Field Order.

Order is descending?

If this box is checked, the sort will be in descending order rather than ascending order for this column.

Is Visible?

If this checkbox is checked, the column will display in the sub report on the form.

Join Field

When this box is checked, the sub report will filter based on the value of this field on the parent form.

For example, if `people_id` is included in the sub report and used as a Join Field and this sub report is used on a form that has a `people_id` field on it, the sub report will only select rows from the view where the `people_id`'s match, effectively filtering the sub report to display only data for the client that the form is for. `people_id` is a commonly used EventLog field on activities for people and is often configured to default to the value for the client whose record is selected.

Overwrite Form Field to Join

This field allows you to designate a different form field from the parent form to join on. If you simply check the Join Field checkbox, the sub report will look for a parent form field that matches the sub report form field. Instead, you can designate a different field here. As an example of where this might come into play, say you have a monthly summary event where the summary's `actual_date` will be the month after that being summarized. The `actual_date` on the parent form will be June when you are summarizing May's services. In order to filter the sub report to May's notes, you will not be able to simply use `actual_date` as a Join Field since that would pull in June's notes. Instead, you would add another date field to the summary (for example `udf_summarized_date` and then use it to overwrite the form field to join with the sub report's `actual_date`.

Operator

The Operator allows you to choose a different operator to use with your join. By default, the operator is equal. You can use this to filter a sub report with a join on a date field using greater than or less than to get entries that occurred before or after a date field on the parent form.