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ZuckerReports Manual

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Introduction

ZuckerReports is an extension module for Sugar Suite, the well-known commercial Open Source Customer Relationship Management software. It is fully integrated into the Sugar Suite and provides a design and runtime environment for buildling visually appealing and signifcant output screens from your CRM system.

Short feature list

- Management of report definitions and query templates
- Management of Microsoft Office templates with binding to Sugar data (mailmerge with Word, Excel reports)
- Management of OpenOffice/StarOffice templates with binding to Sugar data (mailmerge with StarWriter)
- Management of parameter selection lists
- Parametrization and execution of report definitions and query templates
- Categorization of executed reports and query results for later use
- Export of executed reports and query results in various formats

Supported Output Formats

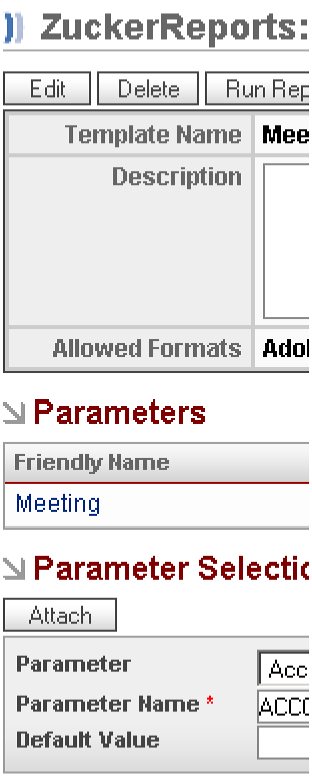
- PDF (with charts – based on JasperReports)
- HTML Tables (full customizable)
- CSV (usable with Microsoft Excel or OpenOffice)
- Microsoft Word
- OpenOffice
- Prospectlists for your Campaign-Management

Quickstart

- Make sure that you have installed Java on your Sugar server
- Install the ZuckerReports module as described in “Add ZuckerReports module to your Sugar installation”
- Check the file “modules/ZuckerReports/config.php”
  Note: nearly all problems are due to java not installed or configured correctly
- Download and install the sample modules (using Sugar Module Loader) in this order:
  - Contacts_Queries
  - Sample_Listings
  - Office_Templates
  - PipelineBySalesStageChart_Report
  - …
- Look at the chapter “Binding Reports or Queries to a Module – IMPORTANT!!!” to get the most out of ZuckerReports.

ZuckerReports Module

The user and administration frontend is embedded as own module in Sugar Suite. It can be enabled/disabled for each user just as with all the other modules coming with Sugar Suite.



The module provides the following functions for your **Sugar administrators**:

- Upload and configure report definitions and Microsoft Office / OpenOffice templates Configure report parameters for resuse among your report definitions
- Manage report categories for clean separation of reporting results for later use
- Define and configure query templates (arbitrary SQL)

For your **Sugar users**, the module provides the following functions:

- Parametrize and execute the report definitions and query templates defined by your Sugar administrators
- Export results in various formats
- Attach results to accounts, cases, projects etc.
- Publish results to “Home” view

Installation of Requirements

Please be sure to meet the following requirements before installation of ZuckerReports.

Sugar >= 4.2

This product has been tested with Sugar 4.2 and will be supported in future releases as well.

Java Development Kit >= 1.4.2

ZuckerReports uses a Java backend for providing it's outstanding reporting capabilities (http://java.sun.com/). Please be sure to install the Development Kit, not only the Runtime Environment on your **Sugar Server**.

iReport (recommended)

iReport is a powerful, intuitive and easy to use visual report designer, suitable for use with ZuckerReports (http://jasperforge.org/sf/projects/ireport). Please follow our "iReport Tutorial" after succesful installation of ZuckerReports for getting to know iReport.

Which iReport version to use ?
ZuckerReports is tested with current iReport release on publication. For future upgrades, ZuckerReports can be used with **any iReport release**, as long as it is compatible with the included jasperreports library. To ensure compatibility:

- Download and install iReport on your workstation
- Remove the full contents of the "modules/ZuckerReports/jasper" folder on your Sugar server **except** file "zuckerreports-1.0.jar"
- Copy the full contents of the "lib" folder of your iReport installation to the folder "modules/ZuckerReports/jasper" on your Sugar server after installation of ZuckerReports.

.net Framework 1.1 and Microsoft Office (on your desktop)

Please be sure to have a working installation of the .net Framework 1.1 and Microsoft Office on your desktop (in case you are using corresponding features of ZuckerReports).

Java Runtime Environment >= 1.4.2 and OpenOffice (on your desktop)

Please be sure to have a working installation of a Java Runtime Environment >= 1.4.2 and OpenOffice on your desktop (in case you are using corresponding features of ZuckerReports).

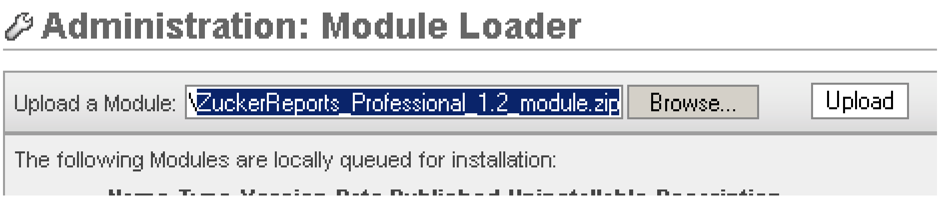
Installation Steps for ZuckerReports

Since Sugar 3.5 the Sugar Module Loader is used for ZuckerReports installation. In case you want to use ZuckerReports with Sugar releases prior to 4.2, please contact us at support@go-mobile.at to receive installation instructions.

Add ZuckerReports module to your Sugar installation

Login to Sugar with your "admin" account and click on "Admin" (right on the top) to open the "Admin"-module.
Click on "Module Loader"

Click on the "Browse…" button and select to file "ZuckerReports_Professional_<version>_module.zip" included in the ZuckerReports distribution. Click on the "Upload" button.



Note: if you receive the error "Please specify a file and try again!", then open your php.ini with your favourite text editor, increase the maximum filesize for upload to 20M and restart apache afterwards:

```
post_max_size=20M
upload_max_filesize = 20M
```

Note: If you have problems uploading such large files, you may follow these steps.

- **Delete the modules/ZuckerReports/jasper folder out of the ZuckerReports module file**
- **Follow all the installation steps in here, the module file now is much smaller**
- **Copy the original modules/ZuckerReports/jasper folder from the ZuckerReports module file to your ZuckerReports installation in your Sugar directory**

You can now see ZuckerReports in the list of available modules. Click on the "Install" button to install the module.

The following Modules are locally queued for installation:

Name	Type	Version	Date Published	Uninstallable	Description		
ZuckerReports	Module	1.2	2005/09/29	No	ZuckerReports	Install	Delete Package

On the next screen click on “Commit” to start installation.

Module is ready to be installed. Click "Commit" to proceed with installation.
Commit

If everything works, you will see a screen telling that installation is completed.

100%

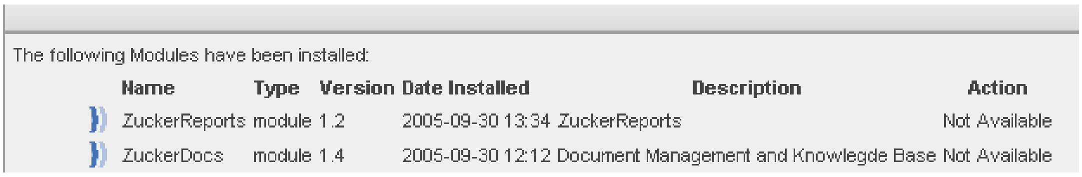
Display Log
Complete
Module Installed successfully!
Back to Module Loader

Note: you may receive more detailed information when clicking on “Display Log”

100%

Merging application files for modules.ext.php in Ext/Include
Copying .../module/ZuckerDocs to modules/ZuckerDocs
Copy C:\DOCUME~1\tremlfl\LOCALS~1\Temp\31D.tmp/module/ZuckerDocs
Copying .../root/download.php to download.php
Copy C:\DOCUME~1\tremlfl\LOCALS~1\Temp\31D.tmp/root/download.php
Installing Images
Copy C:\DOCUME~1\tremlfl\LOCALS~1\Temp\31D.tmp/images
Installing Language Pack ...C:\DOCUME~1\tremlfl\LOCALS~1\Temp\31D.tmp/application/app_strings.en_us.lang.php for application
Installing Language Pack ...C:\DOCUME~1\tremlfl\LOCALS~1\Temp\31D.tmp/application/app_strings.ge_ge.lang.php for application
Rebuilding Language...en_us
Merging module files for en_us.lang.ext.php in Ext/Language/
Merging application files for en_us.lang.ext.php in Ext/Language/
Rebuilding Language...ge_ge
Merging module files for ge_ge.lang.ext.php in Ext/Language/
Merging application files for ge_ge.lang.ext.php in Ext/Language/
Installing Bean : ZuckerDocs
File Does Not Exist:
Complete
Module Installed successfully!
Back to Module Loader

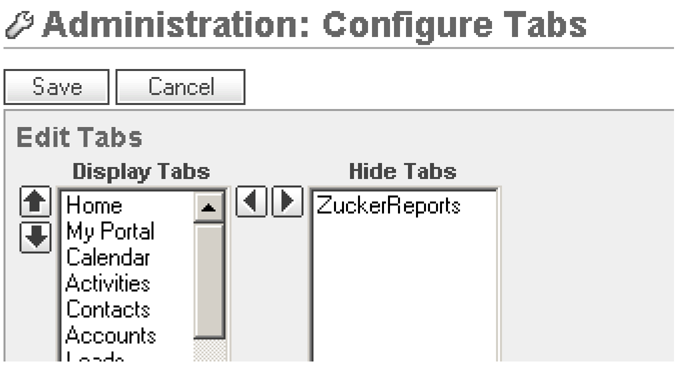
Click on the “Back to Module Loader” button to return to the module list. You can now see ZuckerReports in the list of installed modules.


The following Modules have been installed:

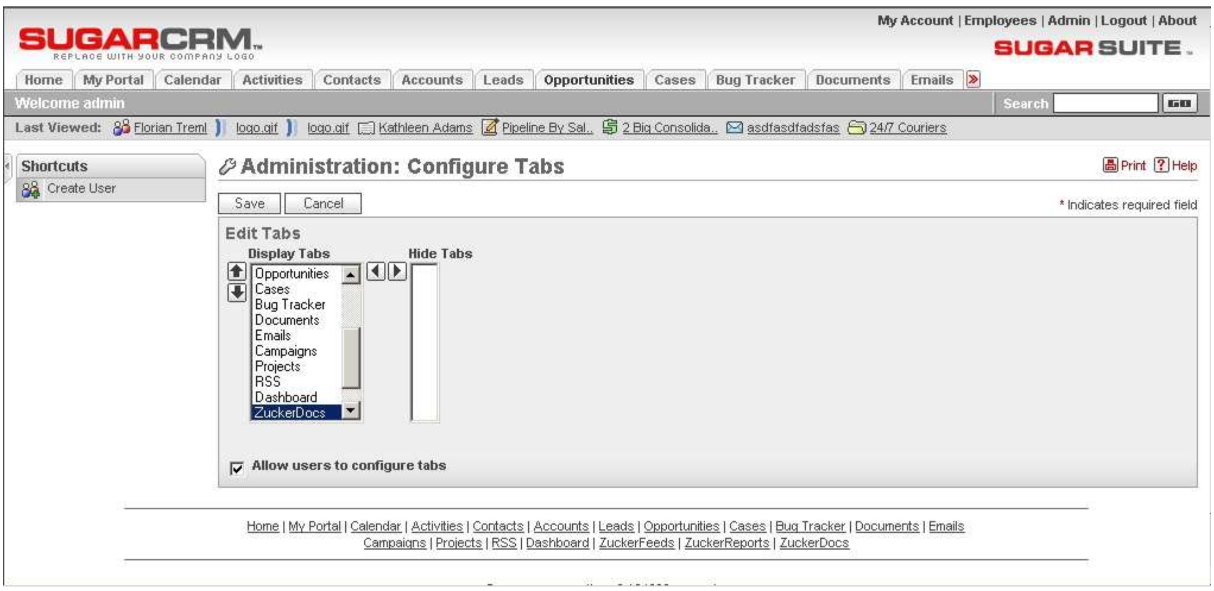
Name	Type	Version	Date Installed	Description	Action
ZuckerReports	module	1.2	2005-09-30 13:34	ZuckerReports	Not Available
ZuckerDocs	module	1.4	2005-09-30 12:12	Document Management and Knowlegde Base	Not Available

Back in the „Admin“-module, click on „Configure Tabs”. You will see a line “ZuckerReports” in the “Hide Tabs” box.

Note: If you don’t see ZuckerReports there, this may be because the “Rename Tabs” function in the Sugar Admin screen currently has a defect. If you ever used this function, ZuckerReports won’t be shown in here until you add the new module “ZuckerReports” manually with the “Rename Tabs” function now.



Select „ZuckerReports“ in the „Hide Tabs“ box and click on the arrow pointing to the left. Click on the “Save”-button.



You can now see the new “ZuckerReports” tab in Sugar.

Post-Installation Steps

Picture Files

Copy the files starting with “Zucker” from the directory <Sugar>/themes/Default/images into the images subdirectory of the theme you are using (<Sugar>/themes/<your-theme>/images).
Note: only with “Sugar” and “SugarClassic” theme the files are already there

ZuckerReports Configuration

The file “modules/ZuckerReports/config.php” contains some configuration settings, most important the path to your Java installation. Open this file with a text editor and read the comments for the different settings.

Uninstallation Steps for ZuckerReports

- Uninstall all report packages you installed with the Sugar Module Loader BEFORE uninstalling the ZuckerReports package
- Uninstall the ZuckerReports package with the Sugar Module Loader

Upgrading ZuckerReports

Patch available

- Login to Sugar with your “admin” account and click on “Admin” (right on the top) to open the “Admin”-module.
- Use the “Upgrade Wizard” to upload and install the patch file.

Patch not available

If there are heavy changes with ZuckerReports from one release to another, the patching mechanism provided by Sugar doesn’t work anymore. Follow these generic steps to do an upgrade without loosing your settings:

- Make a backup copy for “modules/ZuckerReports/resources” folder
- Make a backup copy for “modules/ZuckerReports/config.php” file
- Make a mysql database dump (**data only, no scheme !!!**) for all tables starting with “zucker_” using phpmyadmin or another database tool
- Make a backup copy for “modules/ZuckerListingTemplate/lists” folder (only if changed templates manually)
- Make a backup copy for “modules/ZuckerQueryTemplate/html” folder (only if changed templates manually)
- Uninstall previous release of ZuckerReports
- Install new release of ZuckerReports
- Merge the “modules/ZuckerReports/config.php” backup with the new one
- Restore the other backup copies you made above, including the database dump

Modify “Home” to include published reports

You have to change the files “Home.html” and “index.php” within the “<Sugar-Root>/modules/Home” directory. This step is optional.
Note: please do a backup of these files before making the changes. You have to be something familiar with PHP coding.

Home.html

Add a “MYREPORTS” slot to the layout

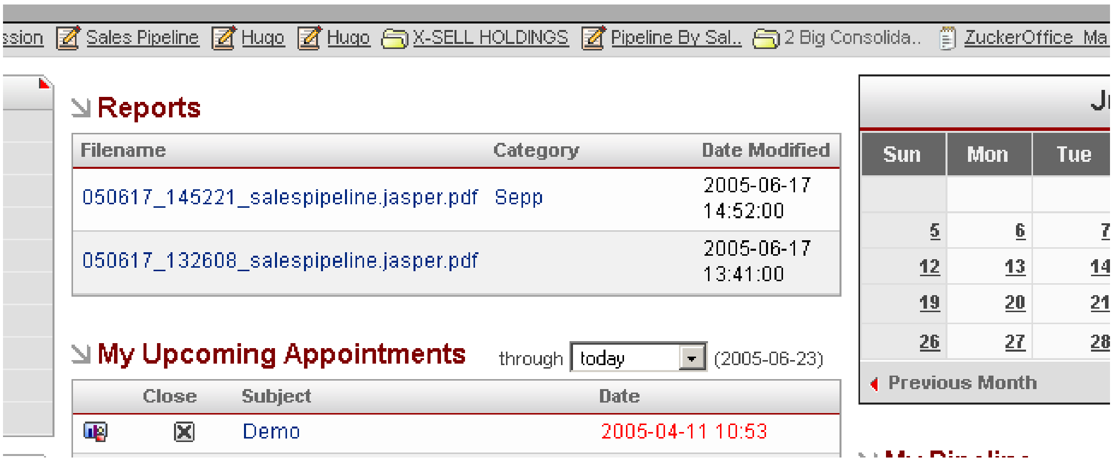
```
…
<!-- BEGIN: main -->
<table cellspacing="0" cellpadding="0" border="0"
valign="top" width="100%">
<tr>  <td valign="top" width="100%">
…
<slot>{MYREPORTS}</slot>
<slot>{MYOPPORTUNITIES}</slot>
<slot>{MYCASES}</slot>
…
</td>
</tr>
</table>
<!-- END: main -->
…
```

index.php

Add the code for the subpanel:

```
…
if(array_key_exists('ZuckerReports', $modListHeader))
 $panels['MYREPORTS'] =
"modules/ZuckerReports/ReportHomeView.php";
if(array_key_exists('Bugs', $modListHeader))
 $panels['MYBUGS'] = "modules/Bugs/MyBugs.php";
…
```

Afterwards, you will find a the “Reports” panel showing the published reports on your “Home” view.



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ZuckerReports Administration

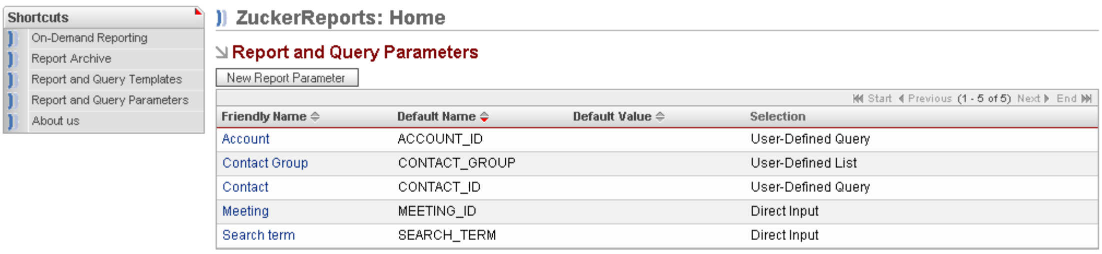
This chapter describes common administration tasks necessary to use ZuckerReports.

Parametrization of your reports

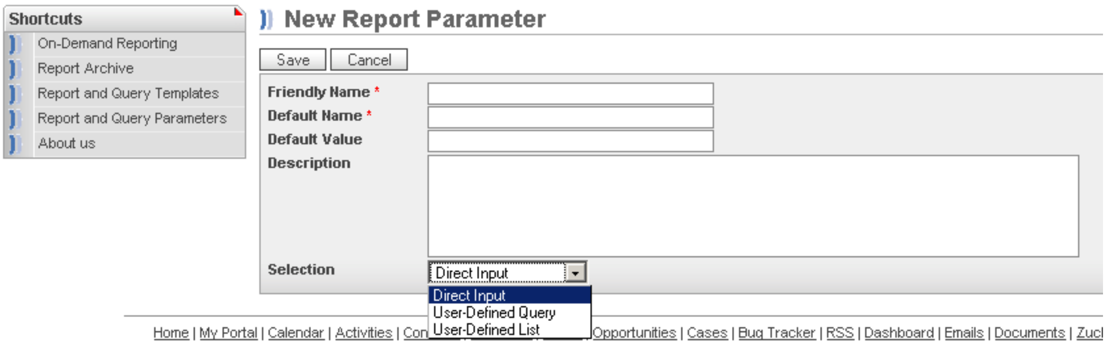
Parametrization is one of the most important topics covered by ZuckerReports: it allows the runtime configuration of report and query execution in a user-friendly way. For example, when designing a report showing sales forecasts, it makes sense to include the timerange for which to do the forecast as a parameter (“Q1”-“Q4”), so you can reuse the report design next year.
To save your time, ZuckerReports maintains a “pool” of parameter definitions you can reuse in all of your reports – for example if you have a bunch of reports showing various information about an account, you only have to define the “Account”-Parameter once and attach it to a number of reports handling the parameter.
ZuckerReports enables your Sugar administrators to configure a user-friendly selection box for a parameter, so your users don’t have to enter the value for the parameter with their keyboard, which is cumbersome and rather errorprone.

Defining a Parameter

- Login to Sugar Suite with your “admin” account
- Within the “ZuckerReports” module click on “Report and Query Parameters”. You now see a list of already configured parameters.



- Click on “New Report Parameter” to define a new parameter, or on the name of an existing parameter for making changes. Click on the “Save” button when you are ready.



“Friendly Name” – Enter the name of the parameter as shown to the user. It should be a short, descriptive text telling the purpose of the parameter, for example “Account Selection”

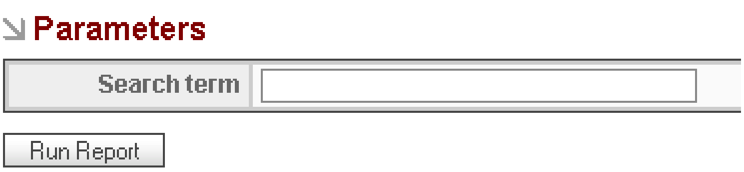
“Default Name” – Enter the name of the parameter as defined in the report (see chapters on report and query definitions), for example “ACCOUNT_ID”

“Default Value” (optional) – This value is the default value which is presented to the user at report and query execution

“Description” (optional) – A descriptive text for the parameter, which contains clear information on how to use this parameter

“Selection” – you can choose between “Direct Input”, “Date Input”, “User-Defined Query”, “User-Defined List”, “Current User” and “PHP Script”

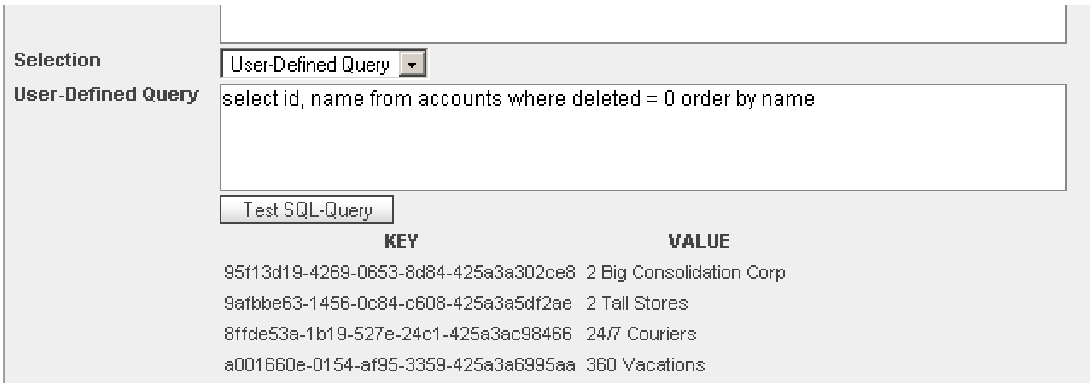
Selection “Direct Input”



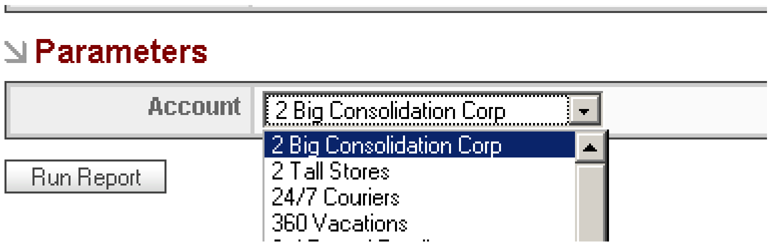
When executing a report or query, a textbox is presented to the user for enter a value for the parameter by keyboard.

Selection “Date Input”
A date selection popup is shown.

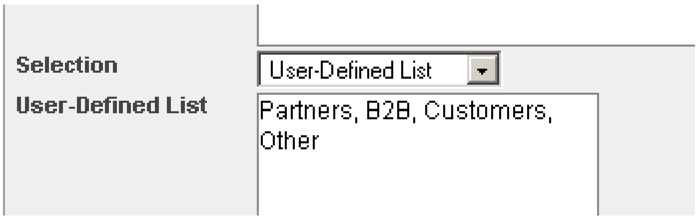
Selection "User-Defined Query"
You can get the value for a parameter from your database, which opens nearly endless possibilities for parameter selection. In the field "User-Defined Query" enter an arbitrary SQL-query which returns a resultset with one or two rows.
Click on the "Test SQL-Query" button to test your query and get a snapshot of the parameter selection.



When executing a report or query, a selection box is presented to the user for mouse selection.

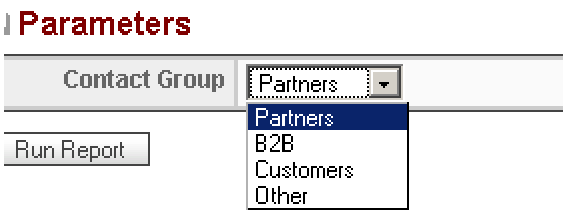


Selection "User-Defined List"



You can enter a list of values manually for providing a range of valid selections to your users. Enter the values separated by a colon.

When executing a report or query, a selection box is presented to the user for mouse selection.



Selection "Drop-Down List"
You may use a pre-defined Drow-Down-List from your Sugar environment for parametrization of your report. Very useful for "status"- or "category"-like fields.

Selection “Current User”

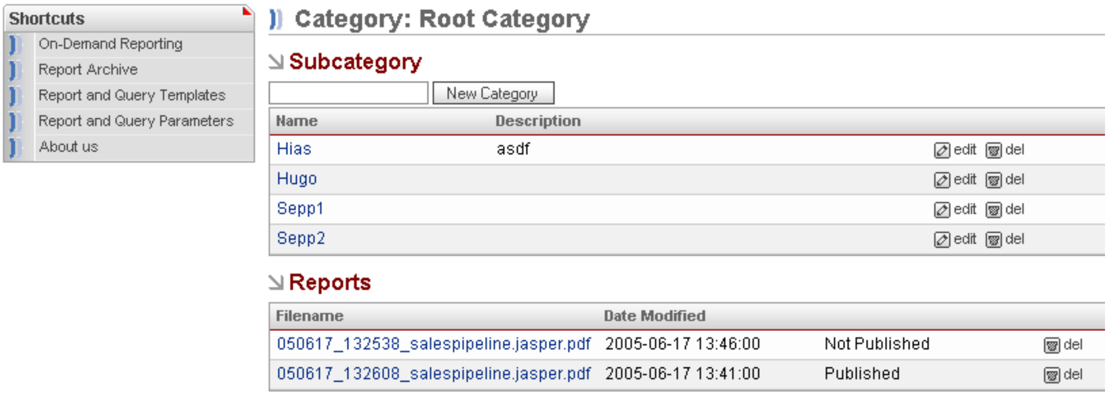
The id of the currently logged on user is returned (no input required)

Selection “PHP Script”

The output of a PHP script is used for parametrization. You may enter any PHP code you want, and finish with a “return” statement.

Category Management

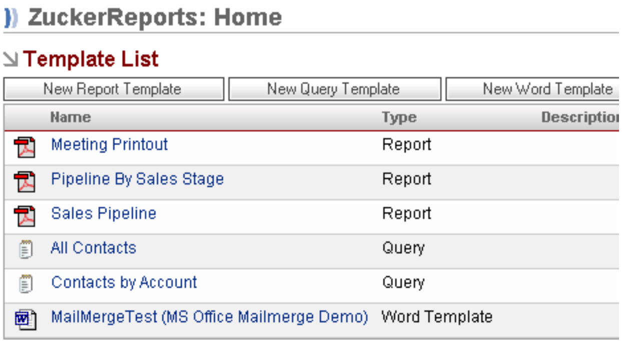
For easy retrieval of your report and query result, you can assign it to a category, which essentially is the same concept as a “Folder” in common Operating Systems. You can create and delete subcategories in the “Report Archive”.

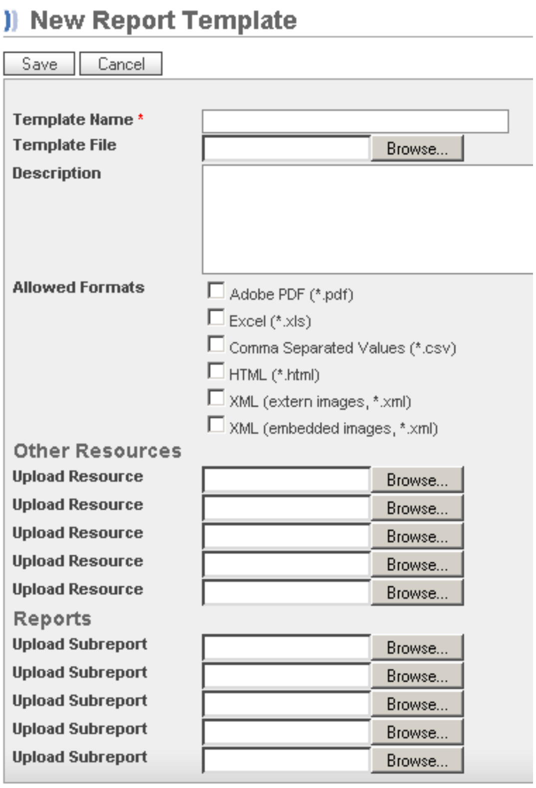


Upload and Configuration of report designs

ZuckerReports can handle reports designed for JasperReports, which are held in files ending in “.jrxml”. The ZuckerReports frontend supports the administrator in upload and configuration of these report design files, as well as attaching and detaching parameters.

- Login to Sugar Suite with your “admin” account
- Within the “ZuckerReports” module click on “Report and Query Templates”. You now see a list of already configured reports and queries.
- Click on “New JapserReports Template” for uploading a new “.jrxml”-file.
- Click on the “Save” button when you are ready.





“Template Name” - The name for the template as shown to the user
“Template File” – using the “Browse”-button select the “.jrxml” file to upload
“Description” (optional) - A descriptive text which contains clear information on how to use this template
“Allowed Formats” – select the formats the report can be exported to after execution

Resource Upload
In case your report uses external resources such as “.class”-files or pictures, upload them as well by using the “Browse”-button in the “Other Resources”-section

Subreport Upload
In case your report is built on subreports, upload the “.jrxml”-files by using the “Browse”-button in the “Reports”-section

Note: please consult the report design manual for correct usage of resources and subreports

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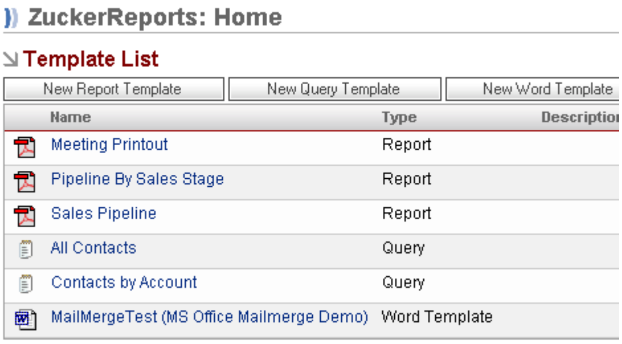
Bind and unbind parameters to report designs

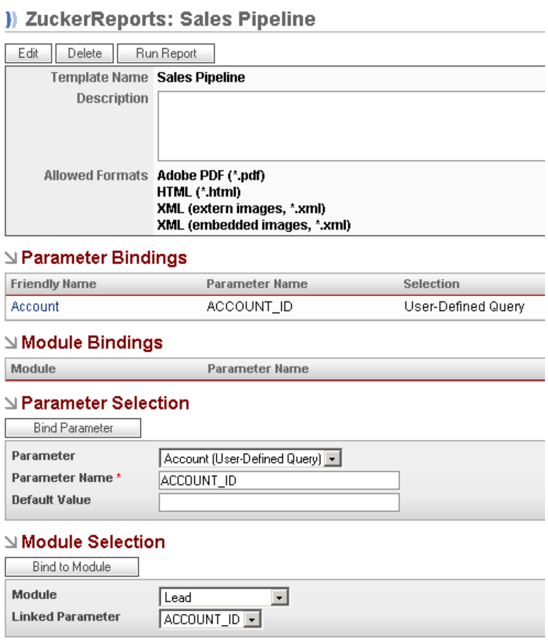
For your report designs you first have to define your parameters in the ".jrxml"-file when designing the report. Please be sure to use exactly the same value for the parameter name in ZuckerReports, as otherwise parameter handling won't work.



- Login to Sugar Suite with your "admin" account
- Within the "ZuckerReports" module click on "Report and Query Templates". You now see a list of already configured reports and queries.
- Click on the name of a report for showing the details.

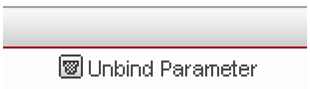
Binding a parameter

- Select the parameter to bind in the "Parameter Selection" section on the bottom
- Enter the "Parameter Name" as used in the report design or accept the suggestion
- Optionally enter a "Default Value" to suggest to the user when executing the report
- Click on the "Bind Parameter"-button.
- The attached parameter now is shown in the "Parameter Bindings" list.



Unbinding a parameter

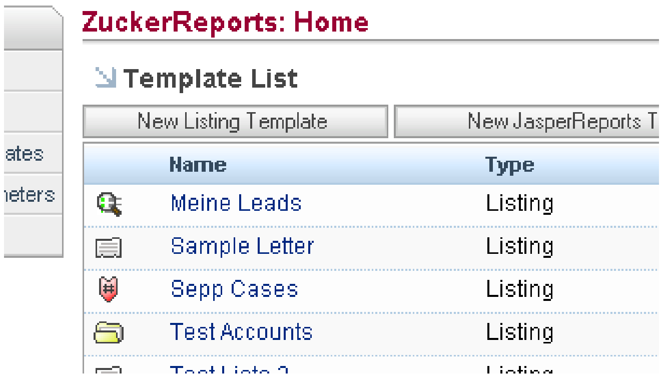
Simply click on the "Unbind Parameter" button in the "Parameter Bindings" list to detach the parameter from the report.

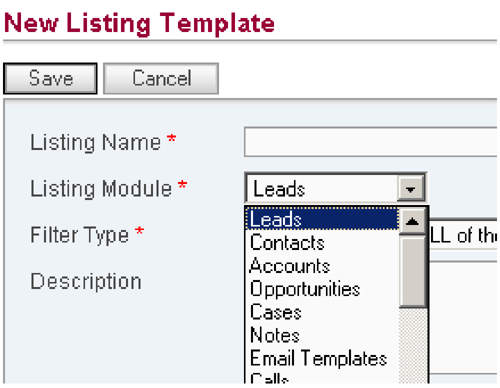


Defining listing templates

Listing templates are the most basic reporting capability within ZuckerReports- just select the object to list (contacts, cases, etc), set your filters and sort order and you are ready to go.

- Login to Sugar Suite with your “admin” account
- Within the “ZuckerReports” module click on “Report and Query Templates”. You now see a list of already configured reports and queries.
- Click on “New Listing Template”
- Click on the “Save” button when you are ready.

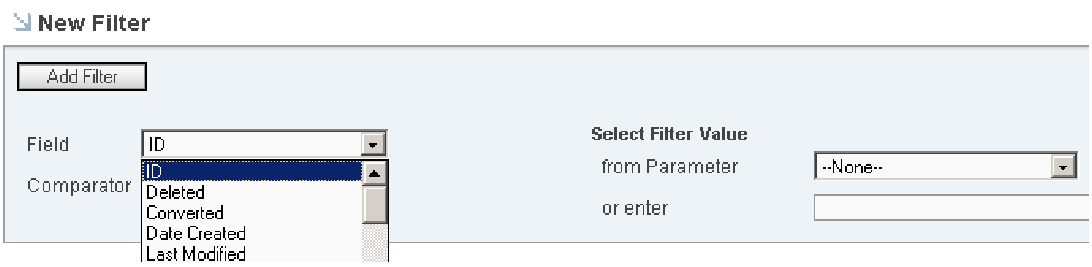




.
“Listing Name” - The name for the template as shown to the user
“Listing Module” – just select the objects you want to get listed
“Filter Type” – select if ALL your filters or only ONE of them have to match (for filter definitions see below)
“Description” (optional) - a descriptive text

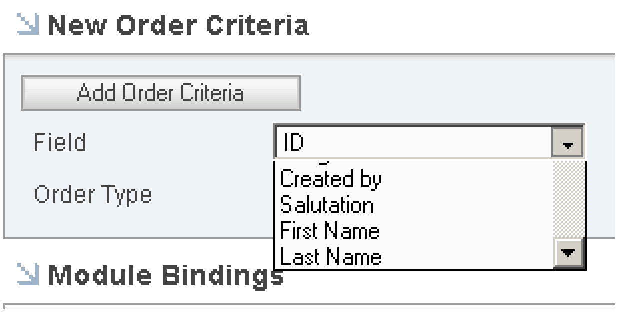
Back on the listing template screen, you can now **add filters**

- Select the field to which to apply this filter
- Select the comparator to apply
- Select the filter value
  - Either from a runtime parameter (see Defining a Parameter above)
  - Or from a selection box (only for fields providing option lists)
  - Or enter a query (for “like”-searches you can use “%” as wildcard)
- Finally click on “Add Filter”



Now you can add **order criterias**

- Select the field to order by
- Select the order type
- Finally click on “Add Order Criteria”



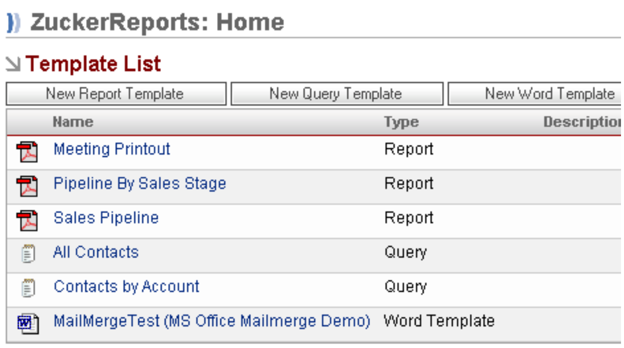
Customizing output of listing templates

The folder modules/ZuckerListingTemplate/lists contains some ready-to-use output templates for your listings. Just create a new one and include it in the “config.php” file right in there to make it available for output.

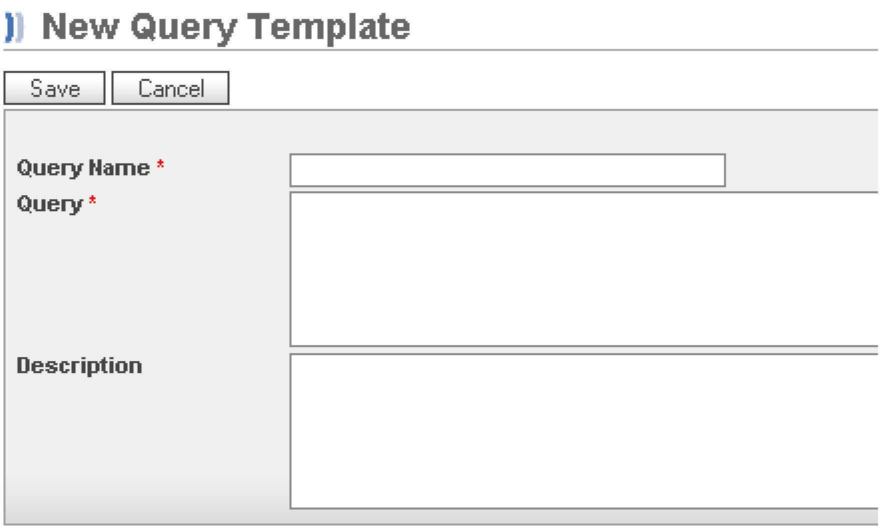
Definition of query templates

ZuckerReports enables Sugar administrator to define arbitrary SQL-queries and let them execute by common Sugar users, including parametrization of the query.

- Login to Sugar Suite with your "admin" account
- Within the "ZuckerReports" module click on "Report and Query Templates". You now see a list of already configured reports and queries.
- Click on "New Query Template" for entering an SQL-query.
- Click on the "Save" button when you are ready.

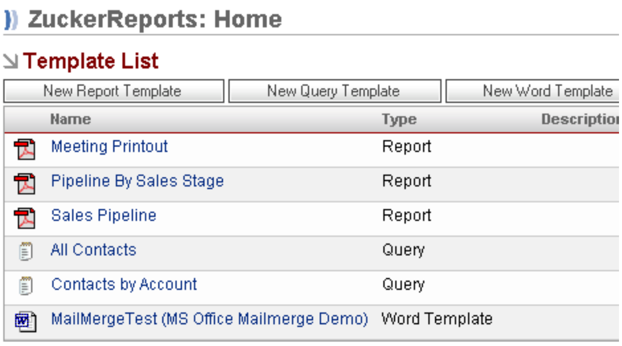


"Query Name" - The name for the template as shown to the user
"Query" – enter your SQL query including placeholders for your parameters (see below)
"Description" (optional) - A descriptive text which contains clear information on how to use this query

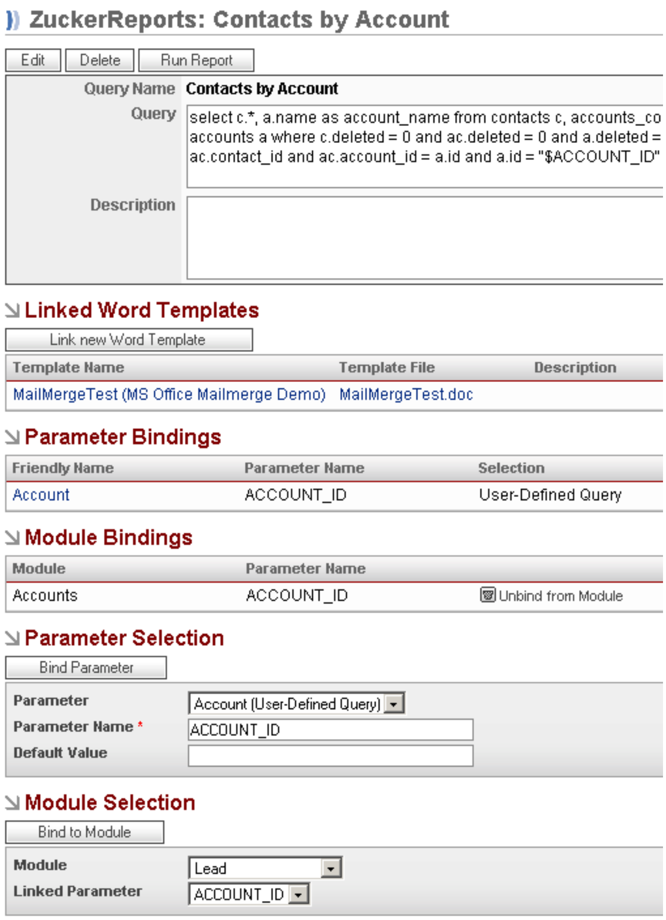


Bind and unbind parameters to queries

For filling your queries with parameters, you have to use placeholders when entering the query (see above). Use the parameter name prepended with a "$", and the parameter value is filled in when executing the query – for example, if you have a parameter named "ACCOUNT_ID", use the placeholder "$ACCOUNT_ID" in your query.



- Login to Sugar Suite with your "admin" account
- Within the "ZuckerReports" module click on "Report and Query Templates". You now see a list of already configured reports and queries.
- Click on the name of a query for showing the details.

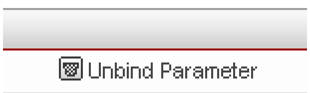


Binding a parameter

- Select the parameter to attach in the "Parameter Selection" section on the bottom
- Enter the "Parameter Name" as used as placeholder in the query or accept the suggestion
- Optionally enter a "Default Value" to suggest to the user when executing the report
- Click on the "Bind Parameter"-button.
- The attached parameter now is shown in the "Parameter Bindings" list.

Unbinding a parameter

Simply click on the "Unbind Parameter" button in the "Parameter Bindings" list to detach the parameter from the query.



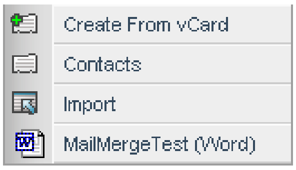
Customizing output of query templates

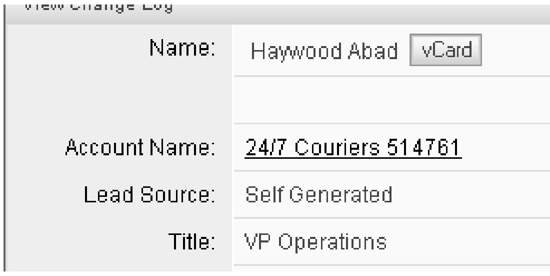
The folder modules/ZuckerQueryTemplate/html contains HTML snippets for formatting the query output. Just edit them with a text editor.

Binding Reports or Queries to a Module – IMPORTANT!!!

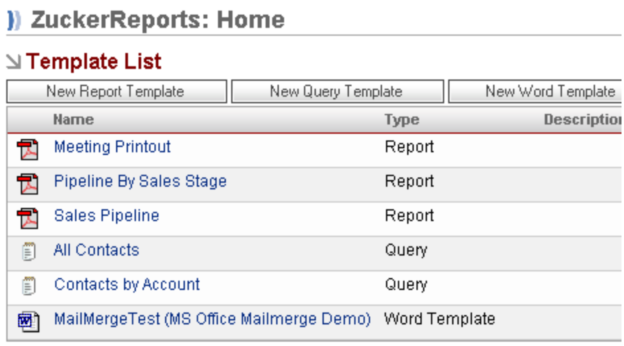
ZuckerReports allows the user to bind reports and queries to modules, which is very useful if you have reports or queries requiring the database identifier for a sugar object (contact, account, project, …) as parameter. You can simply bind the report or query to this module, defining the parameter to set on execution, and the report or query can be called directly from the detail view of the other module.
This is one of the most essential features of ZuckerReports: it provides one-click-report execution from within all other modules. Usage Examples:

- Send letter to all contacts within an account, automatically mailmerged with your Sugar data
- Replace the plain old “Print” button coming with Sugar with pixel exact PDF printouts
- Replace the “Export to PDF” button in the Quotes module with pixel exact and easy-to-design PDF templates



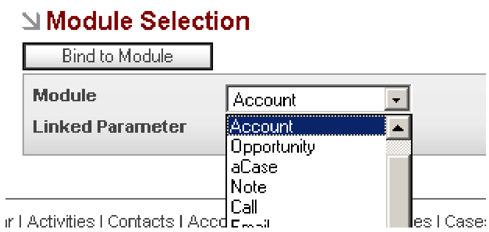


- Login to Sugar Suite with your "admin" account
- Within the "ZuckerReports" module click on "Report and Query Templates". You now see a list of already configured reports and queries.
- Click on the name of a report or query for showing the details.



Binding to a module

- Select the module to bind to in the "Module Selection" section on the bottom
- Select the parameter to link the database identifier for the module item to
- Click on the "Bind to Module"-button.
- The bound module now is shown in the "Module Bindings" list.



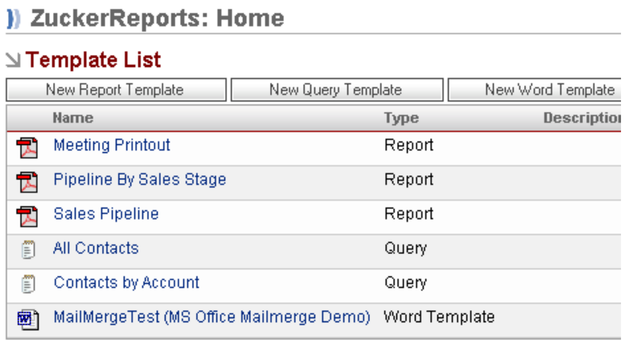
Unbinding from a module

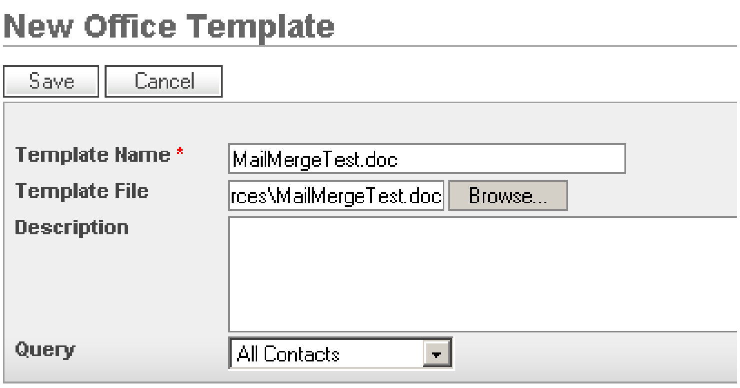
Simply click on the "Unbind from Module" button in the "Module Bindings" list to detach the module from the query or report.

Upload and Configuration of Microsoft Office/OpenOffice files

ZuckerReports can handle Microsoft Office and OpenOffice files bound to a datasource (Word, Excel and StarWriter). At runtime these files are connected to data resulting from a ZuckerReport query template. The ZuckerReports frontend supports the administrator in upload and configuration of these queries and Microsoft Office/OpenOffice files.
Note: Your Microsoft Office/OpenOffice files are always bound to a query template defined in ZuckerReports (see "Definition of query templates"). Parameter and module binding are always taken from these query templates.

- Login to Sugar Suite with your "admin" account
- Within the "ZuckerReports" module click on "Report and Query Templates". You now see a list of already configured reports and queries.
- Click on "New Office Template" for uploading a new ".doc"-file.
- Click on the "Save" button when you are ready.





"Template Name" - The name for the template as shown to the user
"Template File" – using the "Browse"-button select the file to upload
"Description" (optional) - A descriptive text which contains clear information on how to use this template
"Query" – select the query template to bind to

Contact

For licensing questions please contact us at mailto:sales@go-mobile.at
For support questions please contact us at mailto:support@go-mobile.at
For general questions please contact us at mailto:office@go-mobile.at