LOAN SERVICING SOFT Report Writing

This document will guide you through the process of writing reports for LOAN SERVICING SOFT.

For additional information and/or questions please feel free to contact our support group at support@loanservicingsoft.com or 1-800-993-1839 x2.

Prerequisites

LOAN SERVICING SOFT is based on a Microsoft SQL Server 2008 R2 database. In order to build reports on top of our application you need **Microsoft SQL Server 2008 Report Builder 2.0**. Download and install this tool from:

http://www.microsoft.com/download/en/details.aspx?id=9829

You need a connection to SQL Server. For reporting purposes we have created a special SQL Server account **loanservicingrpt**

Tutorials

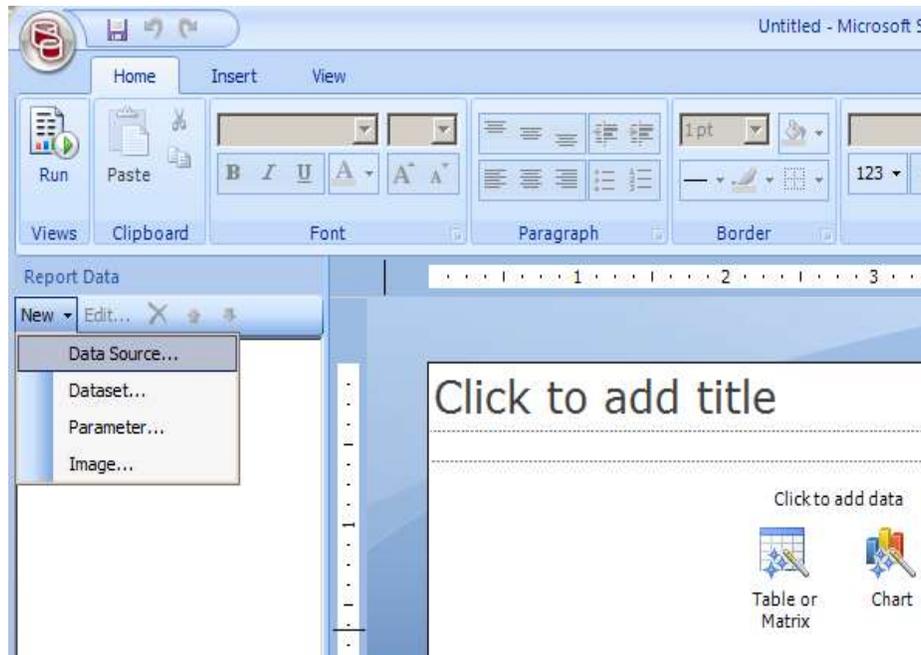Microsoft provides many resources on how to create reports using Report Builder. Here is the main tutorial:

http://msdn.microsoft.com/en-us/library/dd220530(v=SQL.100).aspx
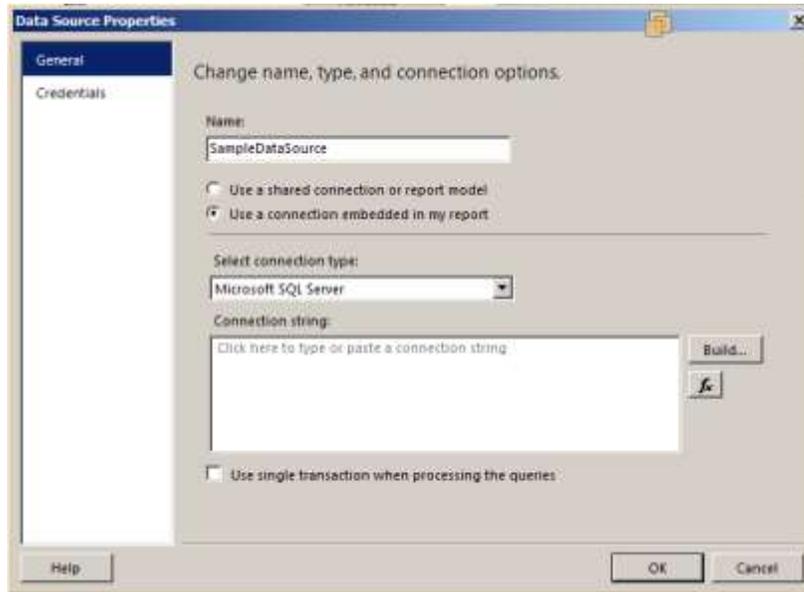
Creating a basic report

1. Open Report Builder


2. Create new Data Source…

3. Give a name to the newly created data source and select "Use a connection embedded in my report". Then select "Microsoft SQL Server" as connection type.

4. Press "Build" button to set the connection string. Enter "Server name", choose "Use SQL Server Authentication" and enter user name (loanservicingrpt) and password. Then you should be able to select the database from the dropdown "Select or enter database name". Hit "Test Connection" to test the new connection and "OK" to close the dialog.
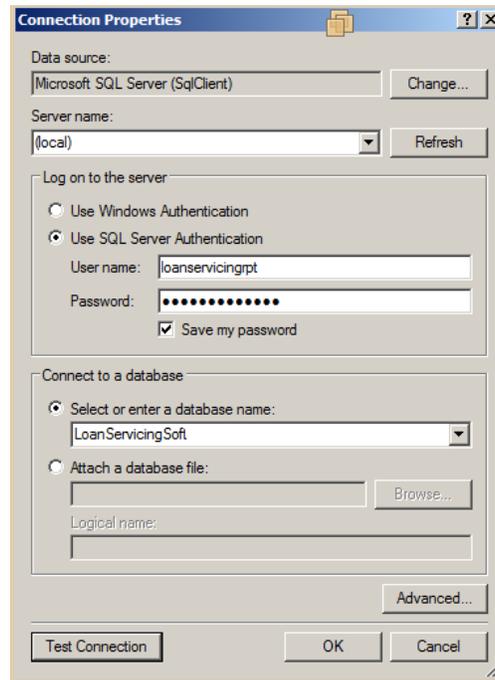

5. Right click on the newly created data source and choose "Add Dataset..."
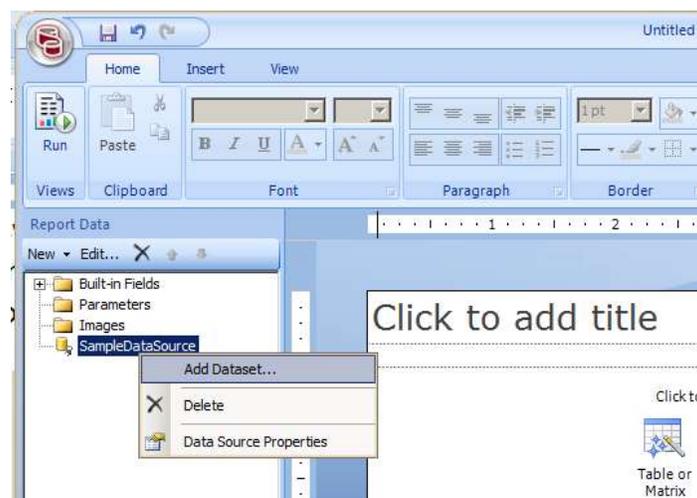
6. Enter the dataset name. You can either use a text query or a stored procedure. To make things easier you can also use the "Query Designer". After you have the query properly designed and tested click "OK".
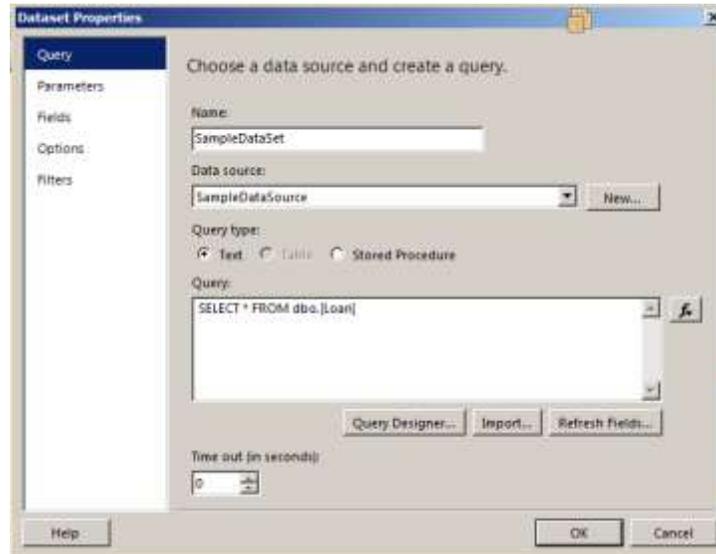
7. Add a table to the report. Select the "Table or Matrix" icon in the middle of the report and follow the wizard (use the dataset you just created).
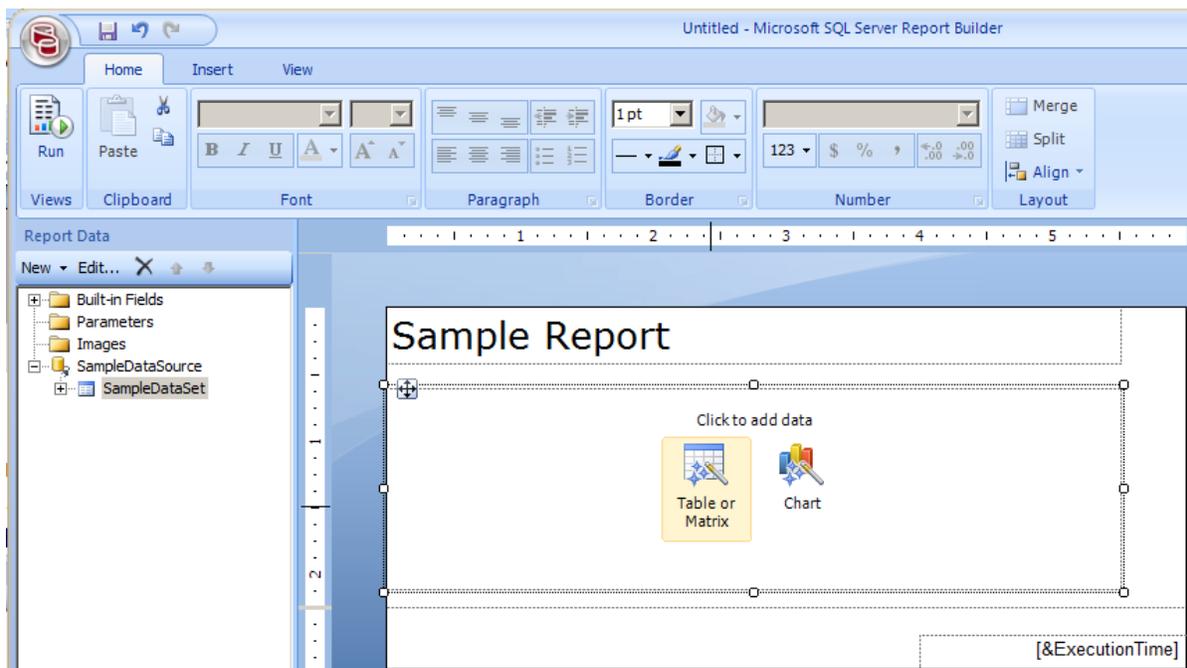
8. Test the report by hitting the "Run" button.
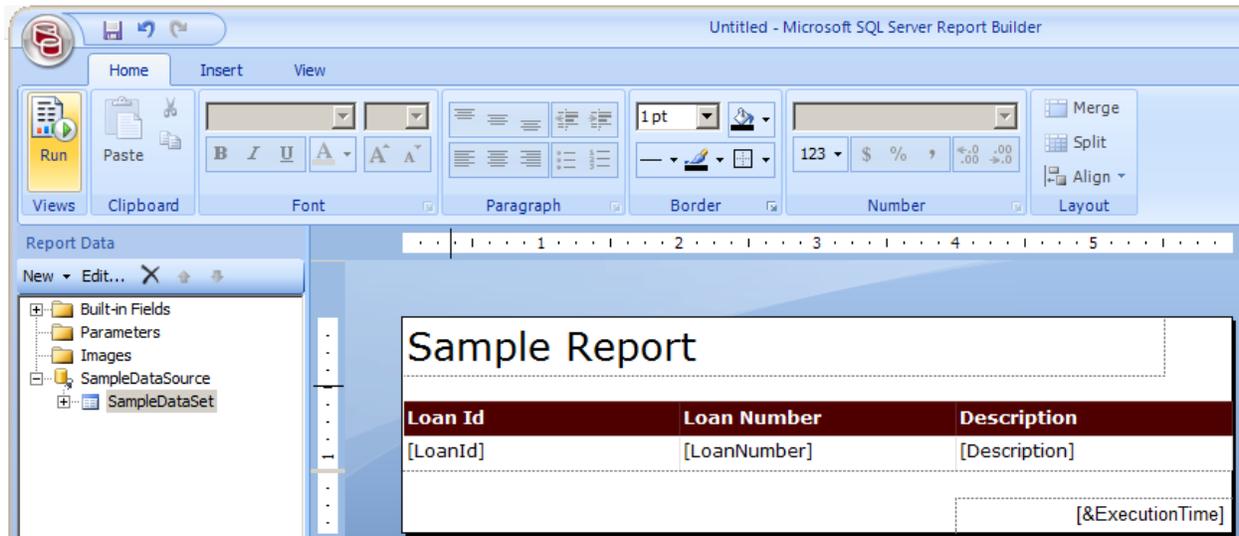
9. Save the report.

**Import reports to LOAN SERVICING SOFT**

Once you have the report tested and saved you can import the report into LOAN SERVICING SOFT and make it available to all users.

For this follow these steps:

1. In LOAN SERVICING SOFT go to Control Panel menu and select Reports Manager from the Configuration Options category. In the Reports Manager select a report group as parent group for the report and press "Add New Report..." menu button.

2. In "Add report" dialog select newly created rdl file using the "Browse..." button, give the report a name and a code (this must be unique), check the parent group name and press OK to upload the reports inside the database.
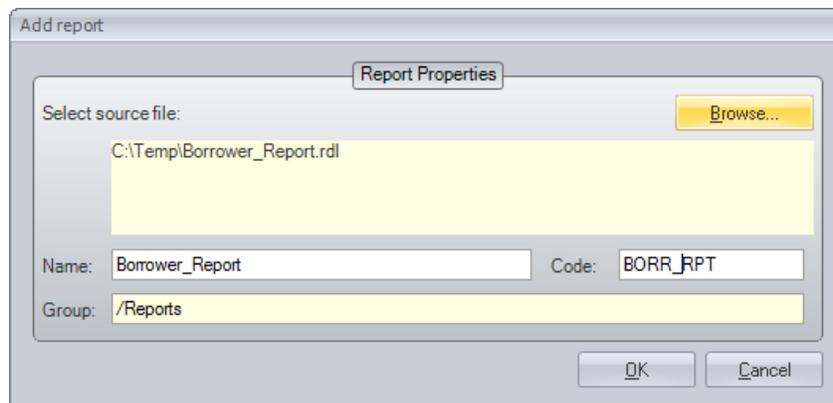
3. If you go back to the "Documents" section you should see the report listed and ready to run.
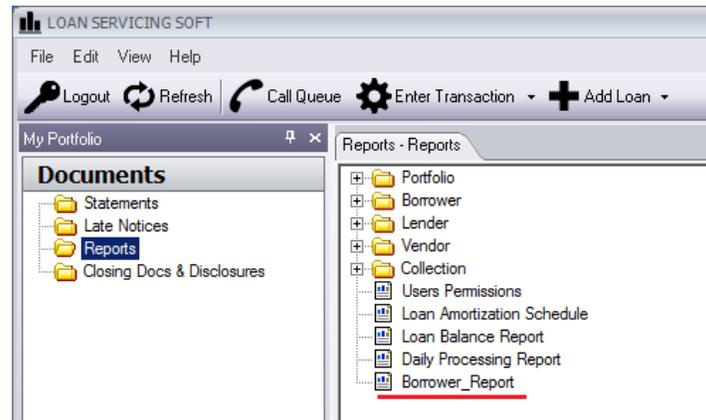
4. Double click on report name to run it. If there aren't any parameters to set the reports will auto run on double click. If you defined parameters you must set them before running the report. Set the parameters and click "Run Report" button in the report viewer window.

5. In the Report Manager (Control Panel -> Configuration Options -> Report Manager) there are also options to:

- replace reports code (when an update is required)
- rename report
- export report code
- and delete report
- here you can also access Image Manager where all logos and pictures are saved. These can be used when creating reports.

Special notes regarding running reports inside LOAN SERVICING SOFT

LOAN SERVICING SOFT supports the following parameters types when running reports:

Parameter Types			
Name	**Type**	**Object Selected**	**Description**
LoanId	String	Loan	Special parameter recognized by name and type. Can select a loan object.
LoanBillId	String	Statement	Special parameter recognized by name and type. Can select a loan statement object.
- (Any name)	String	-	This is the generic string parameter. In order to get a common textbox to enter a text you must not use the two special names LoanId and LoanBillId for this parameter.
BorrowerId	Integer	Borrower	Special parameter recognized by name and type. Can select a borrower object.
LenderId	Integer	Lender	Special parameter recognized by name and type. Can select a lender object.
VendorId	Integer	Vendor	Special parameter recognized by name and type. Can select a vendor object.
UserId	Integer	User	Special parameter recognized by name and type. Can select a user or user group object.
- (Any name)	Integer	-	This is the generic integer parameter. In order to get a numeric box to enter an amount you must not use the special names BorrowerId, LenderId, VendorId and UserId for this parameter.
- (Any name)	Float	-	This is the generic float parameter. The filter control is a numeric box with two decimals.
- (Any name)	Boolean	-	This is the generic Boolean parameter. The filter control is True/False picker.
- (Any name)	DateTime	-	This is the generic float parameter. The filter control is a DateTime picker with month calendar.

LOAN SERVICING SOFT