

Instructions to install customized report to Fishbowl

1. Download the .jasper file to a folder on your hard drive.
2. login to Fishbowl and go to the Reports module.
3. In the top left hand corner of the Reports screen click 'Upload'
4. Browse to the .jasper, select it and click 'Next'
5. Change the report name if you need to (This may avoid a possible duplicate error)
6. Select the report tree folder to store it in and click 'Finish'
7. Select the report from the folder you put it in. Run the report.
8. Enter any necessary parameters
9. Click the 'Details' tab
10. Select which modules/screen you would like to associate the report with.
11. Click 'Save'

If clients can't see a report that you have installed on the server:

If you installed the report from an administrator account, but other users can't access it, the permissions may need to be modified

1. As administrator, go to Setup/User Group. Select the 'Report Rights' tab.
2. Select the group name to set permissions for.
3. Locate the report in the report folders and check the box to the right of the report name.
4. Ensure the user is a member of the group with report permissions: Go to Setup/User, select the user and add the group to "User belongs to:"

To set this report as default:

If this is a default report for a certain screen, such as the default Sales Order or pick ticket; set the report as default in the module options of the Report screen.

1. Go to Tools/Module Options, scroll down until you see the screen the report should be set as default to.
2. Click on the search button next to the screen name.
3. Find the report and select the report.

This will add the report to that screen as the default report. The default report will load when print or print preview is selected.

