



# ACCESS

## Report Builder



**LIST CUSTOMER NAME CITY PHONE ARBAL**

PAGE 1

CUSTOMER . .	CUSTOMER NAME	CITY	PHONE	A/R-BALANCE
1515	A. LO PRESTI & SONS, INC	CLEVELAND	216-431-9700	0.00
3455	AIR BRAKE CONTROLS INC	JACKSONVILLE	904-387-5777	2,361.44
3836	AIR PRODUCTS & CHEMICAL	CLEVELAND	216-447-8877	24.21
4130	ALABAMA ALIGNMENT AND	BESSEMER	205-424-6570	155.61
5090	ALLEN SUGAR	CLEVELAND	216-432-3222	0.00
6290	ANDREWS AUTOMOTIVE	EUCLID	216-486-3798	0.00
8612	AUTOMOTIVE SERVICE CO.	JACKSON	517-784-6131	0.00
3810	BEST PARTS	ORLANDO	407-723-1000	1,809.44
15191	C. O. D.	OH	000-0010	0.00
53535	CITY OF MANSFIELD	MANSFIELD	000-0000	7.00
59824	CITY OF NORTH OLMS TED	NORTH OLMS TED	216-777-8000	0.00
18150	CITY TRUCK SERVICE	CLEVELAND	216-881-5690	254.25
19706	CLEVELAND ELECTRIC ILL	CLEVELAND	216-622-9000	44.93
21777	CLYDE'S FRAME & WHEEL	PONTIAC	313-338-0323	59.13
24240	COVNE TEXTILE SERVICES	CLEVELAND	216-268-5800	169.53
25250	DALEIDEN'S INCORPORATED	KALAMAZOO	616-343-1325	442.27
28400	DOVER BRAKE	STRAHSBURG	216-878-5951	90.00
30500	FH BODY & EQUIPMENT	CLEVELAND	216-696-8608	-6,632.59



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# ACCESS

## REPORT BUILDER

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Creating reports on the information stored throughout the AutoPower System is one of the most powerful features available to the AutoPower user. The user is able to create a wide variety of reports or displays of information found in virtually any data file, whether it is inventory, purchasing, sales history or accounting files. With such a wide range of files and data, the ACCESS Report Builder program enables the newest as well as experienced AutoPower System user to build functional reports of any format, either in summary or detail. Using intelligently designed software, the user is prompted through each step of the way in designing and creating their custom report.

A menu system is designed into the ACCESS Report Builder allowing each user to have his own set of special report menus. Each user is provided with 5 menus containing up to 20 reports in each menu for up to 100 customized reports. Password protection will keep sensitive information secure.

If creating your custom report is a bewildering experience, then the Report Builder is for you. Using a "fill-in-the-blanks" approach, custom reports can be built from over 200 data files.

# **Section 1**

# **Introduction**

## Introduction

AutoPower's ACCESS query language is an integrated part of the relational database that supports the AutoPower System. The application software continually updates the database with each transaction, such as the entry of a sales order, placing purchase orders, updating inventory, updating sales history or posting accounting information. There are hundreds of data files that are continuously updated and constantly changing.

All the data files throughout the system are designed with Data Dictionaries that describe the data fields within each of the files. These Data Dictionaries contain field names that can be used by the query language to specify the information fields to appear on the ACCESS reports.

For example, the Customer Master File has over 50 items in its Data Dictionary, some of which are: Name, City, State, Slsman, Tax, MTD, etc. Creating reports from the various data fields, using simple to understand Field Names gives the novice user a productive report-writing tool.

As with any query language, ACCESS has certain rules to follow. ACCESS is designed to use a sentence like structure that seems English-like. For example, the following ACCESS command will display from the Customer Master File, the company name, city, phone number and current A/R balance.

### LIST THE CUST-MAST FILE THE NAME CITY PHONE ARBAL

While this ACCESS command appears quite simple, more complex ACCESS sentences can produce dramatic reporting results. As the reports become more complex, so do the rules for building such reports.

CUSTOMER..	CUSTOMER NAME	CITY	PHONE	A/R-BALANCE
1515	A. LO PRESTI & SONS, INC	CLEVELAND	216-431-9700	0.00
3455	AIR BRAKE CONTROLS INC	JACKSONVILLE	904-387-5777	2,361.44
3836	AIR PRODUCTS & CHEMICAL	CLEVELAND	216-447-8877	24.21
4130	ALABAMA ALIGNMENT AND	BESSEMER	205-424-6570	155.61
5000	ALLEN SUGAR	CLEVELAND	216-432-3222	0.00
6290	ANDREWS AUTOMOTIVE	EUCLID	216-486-3798	0.00
8612	AUTOMOTIVE SERVICE CO.	JACKSON	517-784-6131	0.00
3810	BEST PARTS	ORLANDO	407-723-1000	1,809.44
15191	C. O. D.	OH	000-0010	0.00
53535	CITY OF MANSFIELD	MANSFIELD	000-0000	7.00
59824	CITY OF NORTH OLMSTED	NORTH OLMSTED	216-777-8000	0.00
18150	CITY TRUCK SERVICE	CLEVELAND	216-881-5690	254.25
19706	CLEVELAND ELECTRIC ILL	CLEVELAND	216-622-9800	44.93
21777	CLYDE'S FRAME & WHEEL	PONTIAC	313-338-0323	59.13
24240	COYNE TEXTILE SERVICES	CLEVELAND	216-268-5800	169.53
25250	DALEIDEN'S INCORPORATED	KALAMAZOO	616-343-1325	442.27
26400	DOVER BRAKE	STRASBURG	216-878-5951	90.00
30500	FM BODY & EQUIPMENT	CLEVELAND	216-696-8608	-6,632.59



# ACCESS Report Builder

## Using the ACCESS Report Builder

The ACCESS Report Builder can be accessed from any Menu screen. When the menu is displayed, one of the utilities shown in the boxes at the bottom of the screen identifies the availability of the Report Builder. As shown below, the ACCESS utility box indicates the user can enter the letter **R** to jump to the ACCESS Report Builder program.

```
08/01/95 (2)          AUTOPOWER SYSTEM          04:07PM
-----
                ACCOUNTS RECEIVABLE
1....CUSTOMER A/R INQUIRY
2....CASH RECEIPTS MENU
3....COLLECTION MANAGER MENU
4....REPORTS MENU
5....FILE MAINTENANCE MENU
6....PROSPECT MAILING LIST MENU
7....MONTH END CLOSING

Enter Selection:  _

TC=Clock S=Spooler H=Help! R=ACCESS C=Catalog N=NoteCards A=AutoMail Q=DesqTop
```

At the **ENTER SELECTION** prompt shown on the menu above, enter the letter **R** to select the ACCESS Report Builder.

Upon entering the **R** at the menu selection prompt, the main ACCESS Report Builder screen appears. As you can see, all the report menus are Unassigned and the report selections are Open. This is how the Report Builder is initialized when a new User begins the ACCESS Report Writer.

```
ACCESS REPORT BUILDER: Reports Menu
1. Open
2. Open
3. Open
4. Open
5. Open
6. Open
7. Open
8. Open
9. Open
10. Open
11. Open
12. Open
13. Open
14. Open
15. Open
16. Open
17. Open
18. Open
19. Open
20. Open
UNASSIGNED MENU
UNASSIGNED MENU
UNASSIGNED MENU
UNASSIGNED MENU
UNASSIGNED MENU
UNASSIGNED MENU
Options
Use arrow keys to highlight a menu. Press RETURN to select, ESC to quit
```

### 5 Steps to Building a Custom Report

Use these basic steps to create a custom report from the Report Builder:

**Step 1:** Select a Report Menu

**Step 2:** Select an "OPEN" Report

**Step 3:** Define the Report

- a. Enter the menu title
- b. Define the ACCESS Verb: List, Sort, etc.
- c. Define the file name: Cust-Mast, Inv-Mast, etc.
- d. Define what data will be included or excluded
- e. Define how the data will be sorted
- f. Define what fields will be printed
- g. Define the report headings
- h. Update and add the report to the report menu

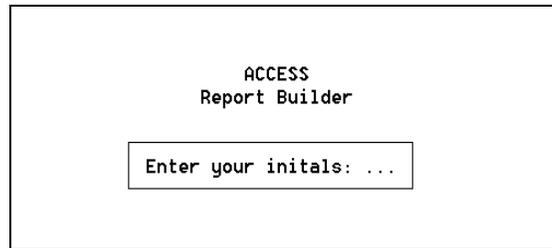
**Step 4:** Run the report

**Step 5:** Should you wish to make changes to the report, and then return to the Report Definition, Step 3, that is used to make your changes.

# ACCESS Report Builder

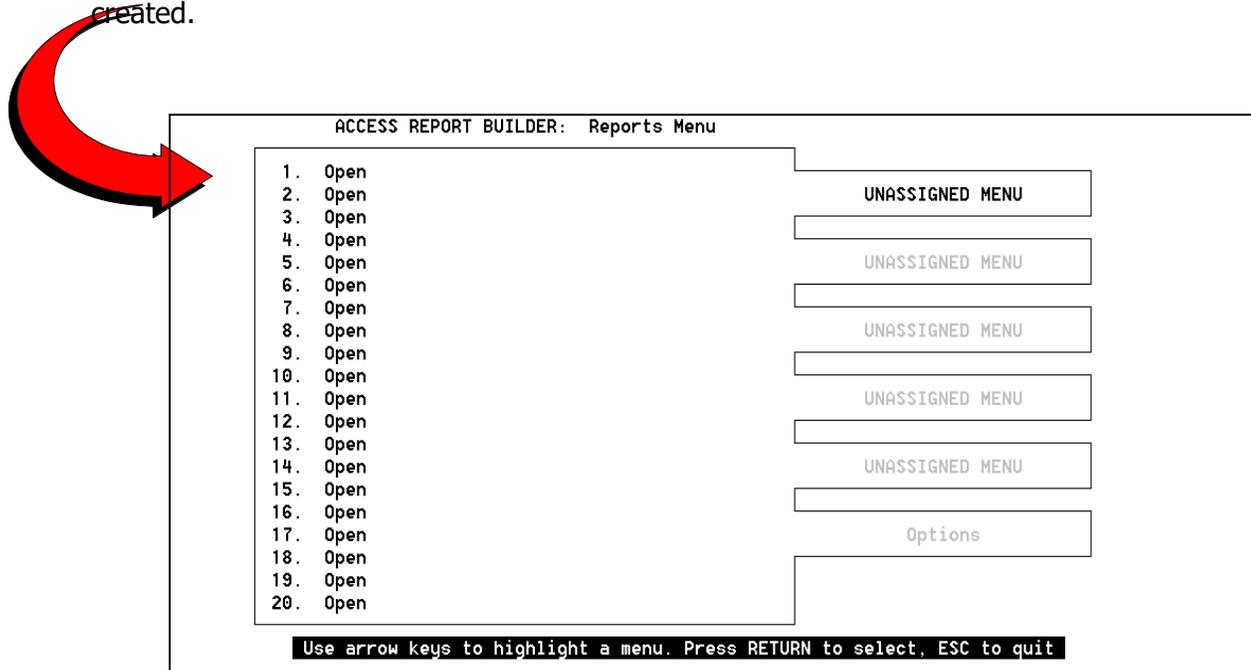
## Starting up the Report Builder

After selecting the ACCESS Report Builder from the menu, the user will be asked to enter their initials. Should this be the first attempt by the user to use the Report Builder a question will be asked to allow addition of a New User. When a New User is added to the Report Builder, or an established user's initials are entered, their personal reports menu will display.



A rectangular window titled "ACCESS Report Builder" with a text input field containing the prompt "Enter your initials: ...".

After entering your initials, the Report Builder Screen shown below appears. Prior to defining the menu titles, UNASSIGNED MENU, will be displayed. "Open" will also appear at each report selection. The "Open" will be replaced with the report names as the custom reports are created.



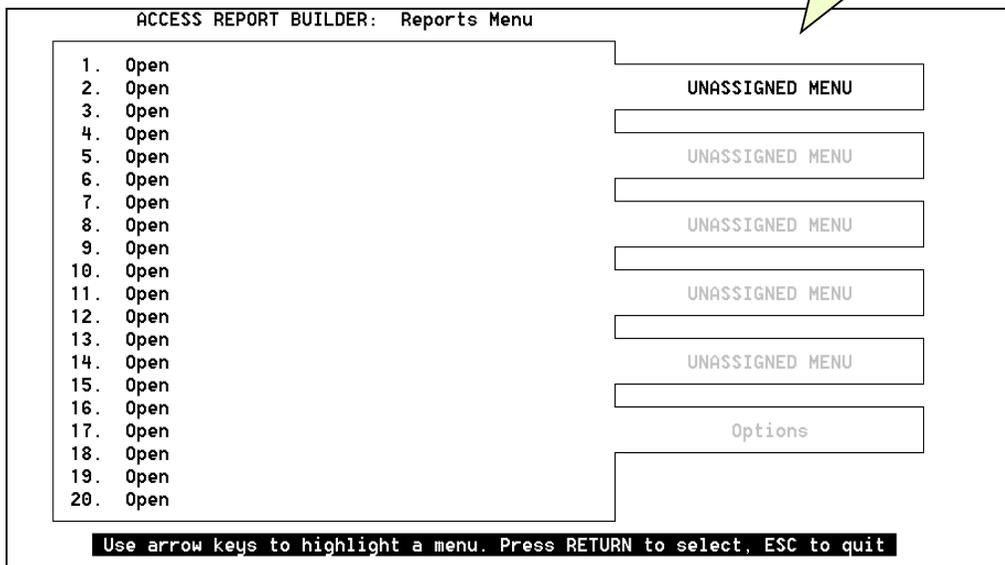
A screenshot of the "ACCESS REPORT BUILDER: Reports Menu" screen. A red arrow points from the text above to the left side of the menu. The screen displays a list of 20 items, each labeled "Open", followed by a vertical column of menu options. The options include "UNASSIGNED MENU" (repeated 10 times), "Options", and a footer instruction: "Use arrow keys to highlight a menu. Press RETURN to select, ESC to quit".

Item Number	Item Label	Menu Option
1.	Open	UNASSIGNED MENU
2.	Open	UNASSIGNED MENU
3.	Open	UNASSIGNED MENU
4.	Open	UNASSIGNED MENU
5.	Open	UNASSIGNED MENU
6.	Open	UNASSIGNED MENU
7.	Open	UNASSIGNED MENU
8.	Open	UNASSIGNED MENU
9.	Open	UNASSIGNED MENU
10.	Open	UNASSIGNED MENU
11.	Open	UNASSIGNED MENU
12.	Open	UNASSIGNED MENU
13.	Open	UNASSIGNED MENU
14.	Open	UNASSIGNED MENU
15.	Open	UNASSIGNED MENU
16.	Open	UNASSIGNED MENU
17.	Open	Options
18.	Open	
19.	Open	
20.	Open	

## Navigating the Report Builder Menu

Navigating around the menu screen shown below is performed using the Up-arrow and Down-arrow keys. These keys will highlight one of the 6 menu bars shown on the right. When the menu bar of choice has been highlighted, then press the RETURN/ENTER key and the report selections associated with that menu will display on the left side of the screen, items 1 through 20.

By pressing the up-arrow and down-arrow keys, the title of the menu bars below will be highlighted. Pressing the down-arrow key will cycle through all the menu bars. At the menu bar of choice, press the RETURN/ENTER key.



Upon pressing the RETURN/ENTRY key, the user can select any one of the 20 "Open" report items. Selecting an "Open" report will permit the user to build a custom report with its specific definitions for the ACCESS command that will produce the report.

# Section 2

# Options Menu



### Report Builder Options Menu

Of the 6 menu bars shown on the right side of the ACCESS Report Builder screen, the last menu bar is the Options Menu. This menu contains 12 selections that are used to maintain the Report Builder system, expand the data dictionaries and provide password security to the Report Builder functions.

#### **A word on passwords**

The System Manager in your company should become familiar with the Option Menu and utilize these functions where required. The first issue to be decided is how much password security will be necessary, what functions to be password protected, and who will be given the passwords. For instance, Creating and Copying file dictionary items should be reserved for use by the System Manager. Inexperienced users will get into trouble with these two features by placing improperly structured dictionary items into a file data dictionary. Even Deleting a report from a user's menu should be done with caution and is recommended to be password protected.

The 12 selections on the Options Menu are:

- 1. Display Files** - This function provides an alphabetical listing of the available data files within a selection window. By selecting a specific File Name, a description of the file can be viewed. To get a printed report of these data files and their descriptions, use Option #5.
- 2. Display File Dictionary** - When the Data Dictionary of a specific file is needed, then it can be displayed. This function will provide an alphabetical listing of the data files. Selecting the specific File Name, the data dictionary of the file will be displayed in a viewable window. Then by selecting a specific dictionary item (Field Name), a description of that Field Name will be displayed. To print this file's data dictionary, use Option #6.
- 3. Create File Dictionary** - This function will guide the user through the creation of a data dictionary item for a specific File Name. Sometimes, the data dictionary item needed for a specific custom report is not available. This function can be used to create the desired data dictionary item.
- 4. Copy File Dictionary** - When a data dictionary item is not in a file, sometimes the dictionary item can be copied from one File Name to another File Name. When copied, the dictionary item is added to the data dictionary of the target file.

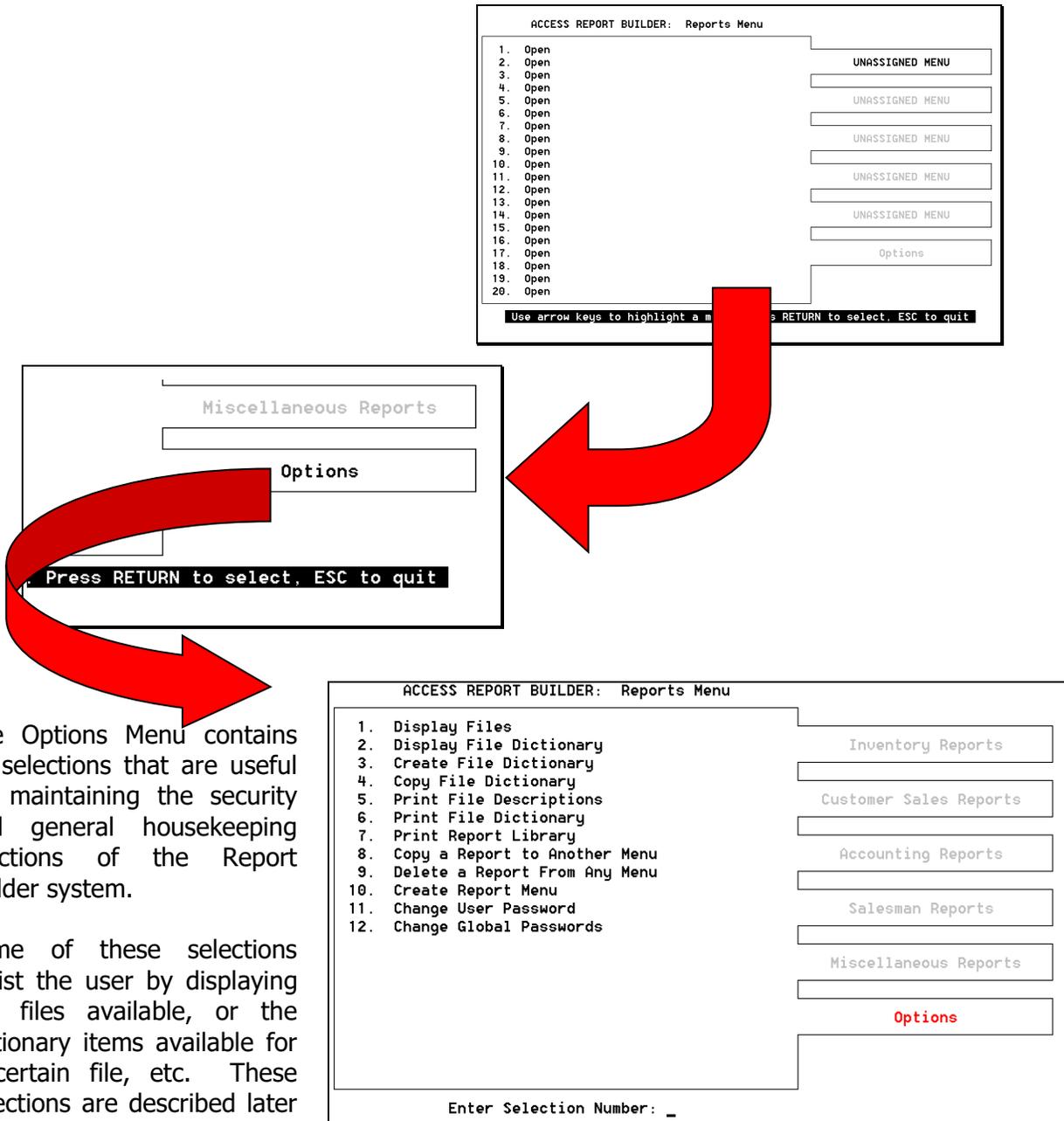
### Report Builder Options Menu continued...

5. **Print File Descriptions** - To print a report of the available data files and their descriptions, use this option.
6. **Print File Dictionary** - To print a report of the data dictionary items of a specific file name, use this option.
7. **Print Report Library** - After creating the custom reports, a printout of the report names and the definitions can be made. A listing of custom reports can be printed for a specific user or all users. This report can be used as a reference guide when creating additional reports.
8. **Copy a Report to Another Menu** - Once a report has been created and tested, it can be copied to any user's reports menu. This will allow distributing the report to those users who require this report within their job function.
9. **Delete a Report From Any Menu** - When a report is no longer useful, it can be deleted from that user's reports menu. Removing a specific report from one menu does not remove the same report from other user's menus. This report deletion function will be necessary to provide good housekeeping throughout the Report Builder System.
10. **Create Report Menu** - When starting up the Report Builder for a specific user, the names of the menus are given **Unassigned Menu**. When reports are created, they can be added to any of the 5 menus available. To properly categorize these reports, they should be added to a specific menu. A menu title can be assigned to the specific menu denoting the type of reports contained within that menu.
11. **Change User Password** - Any user can password protect their report menus. This password is entered by the user and can be changed or deleted by that user. This will secure those reports containing sensitive information.
12. **Change Global Passwords** - The System Manager should place passwords on the sensitive functions of the Options Menu that are to be executed by certain persons. This will protect integrity of the database and the report definitions within the Report Builder system.

# ACCESS Report Builder

## Report Builder Options Menu continued...

The Options Menu is the bottom menu bar as seen on the right side of the menu display. Highlight the Options Menu bar, using the Up and Down-arrow keys. When the Options Menu is highlighted, press the RETURN/ENTER key. This will display the Options Menu and its selections.



The Options Menu contains 12 selections that are useful for maintaining the security and general housekeeping functions of the Report Builder system.

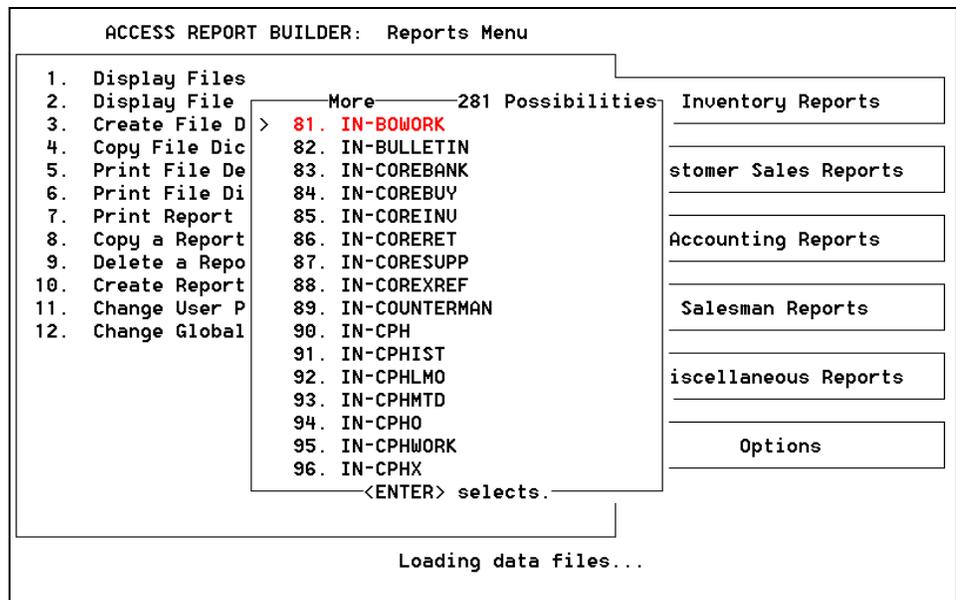
Some of these selections assist the user by displaying the files available, or the dictionary items available for a certain file, etc. These selections are described later in the book.

## Options Menu - Selection 1 - Display Files

Selection 1 of the Options Menu will display the data files available for use within the ACCESS Report Builder. Over 200 files can be seen. The user can scroll through the File Selection Box and press the RETURN/ENTER key at any highlighted file name to see a description of the file. This can be helpful in understanding how each file is used and the kind of information stored in the specific file.

As shown below, the Display Files screen illustrates the File Selection Box and a section of the many files available.

Having selected item **1** on this menu, the **Display Files** feature will present a window of all the available data files that can be used within the Report Builder for creating custom reports.



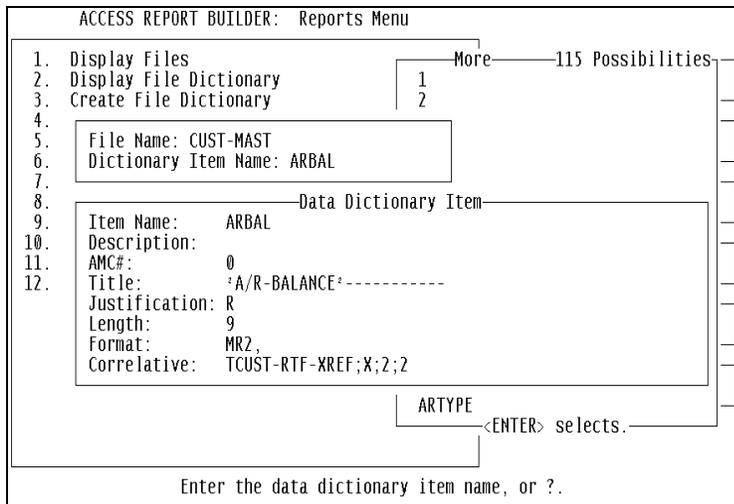
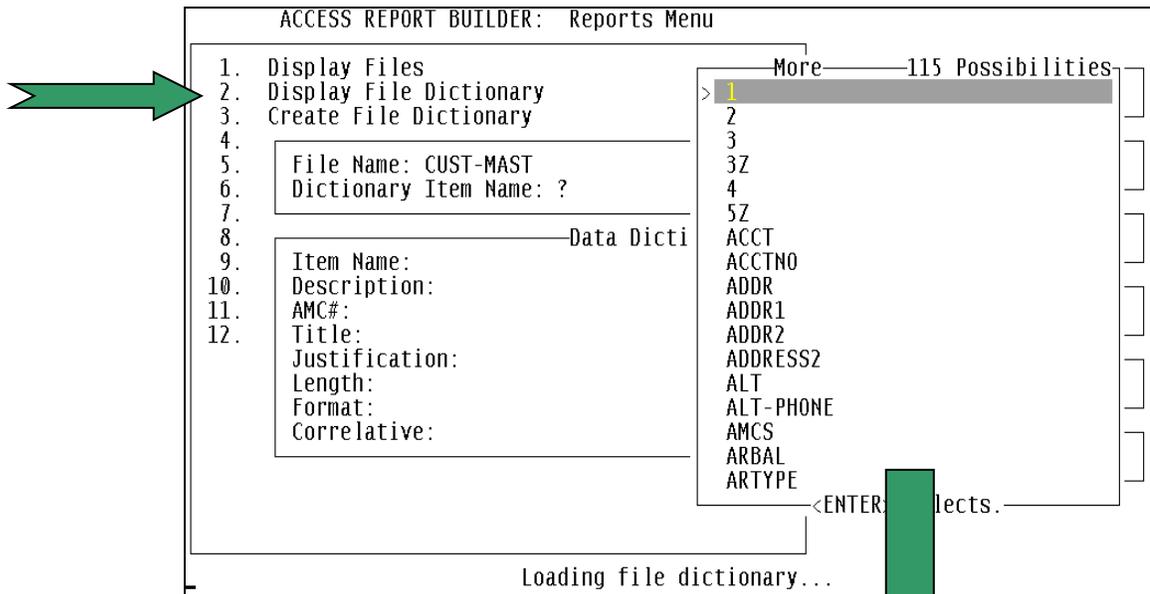
Use the Up-arrow and Down-arrow keys to scroll through the list of data file names. When the file name you want is highlighted, then press the RETURN/ENTER key to select the file. When selected, a file description window will appear that describes the file, its use and the type of data it contains.

# ACCESS Report Builder

## Options Menu - Selection 2 - Display File Dictionary

Selection 2 of the Options Menu will display the data dictionary of a specific file name. Should there be a certain Field Name needed for one of the custom reports, then a display of the data dictionary of the file will provide a listing of the field names (dictionary items) available for the use of the report.

As shown below, the Display data Dictionary screen illustrates a portion of the data dictionary of the Customer Master File.



A display of the dictionary item contents is provided to illustrate the construction of the item. Building dictionary items usually is left up to experienced ACCESS users.

## Options Menu - Selection 3 – Create File Dictionary

Selection 3 of the Option Menu will give the user the ability to create a Field Name in the data dictionary of a specific file. While the files on the system contain their own dictionary whose data Field Names will satisfy nearly all the reporting requirements of the user, there may be a rare occasion when a new field Name has to be added to the data dictionary. When the Field Name is added to the data dictionary of the specific file, the Field Name can then be used when building a customer report.

The screen below is displayed allowing the entry of the information used to construct a new Field Name. It may be important, before proceeding, that the user understands the concepts of the file data dictionary and the types of field names that are present. Should the Field Name to be added not be created properly, then undesirable results will occur when the invalid Field Name is used in a report. The system documentation manuals supplied with the computer system contain topics of great length describing the file dictionary design. The user should become familiar with this topic before attempting the creation or modification of dictionary items.

```
ACCESS REPORT BUILDER: Reports Menu
1. Display Files
2. Display File Dictionary
3. Create File Dictionary
4.
5. File Name: CUST-MAST
6. Dictionary Item Name: NAME1
7.
8. Data Dictionary Item
9. Item Name: NAME1
10. Description: Name
11. AMC#: 1
12. Title: ^CUSTOMER NAME^
    Justification: L
    Length: 30
    Format:
    Correlative:
```

At the **File Name** prompt, enter the name of the specific data file, or press enter to see all available file names. Then enter the Data Dictionary Item Name to be created.

## Options Menu - Selection 4 – Copy Dictionary Item

Selection 4 of the Option Menu will allow copying a file dictionary item from one file to another. Often, the Field Name in one file can be used in another file, therefore copying it to the target file may be easier than creating it from scratch. Or another situation could be that the dictionary item can be copied to a different name and then the newly named item can be modified slightly providing different results when printing this new Field Name on a report.

For example, some date field will print the date in **mm/dd/yy** format. But, if you wanted all for digits of the year to print in the format of **mm/dd/yyyy**, this can be achieved by copying the original date field in the file to another item name. Then modify the newly name item from a format of **D2/** to **D4/** and the date would now print all four digits of the year.

The screen samples below show the prompts required when wanting to copy a file dictionary item from one file dictionary to another, or from one name to a new name within the same file dictionary.

Selection 4 of the Option Menu will display the screen window on the right. You will be prompted for the file name where the dictionary item is currently stored.

Then you will be asked to enter the name of the file where the dictionary item will be copied. Should the Field Name already exist in the target file, then you will be prompted to overwrite the existing item Field Name.

**Note: only experienced ACCESS users should do this. Should the existing Field Name be changed in any way by proceeding with the Overwrite, then any of the normal AutoPower ACCESS reports will be wrecked. So, beware of how you use the Overwrite option.**

ACCESS REPORT BUILDER: Reports Menu

1. Display Files
2. Display File Dictionary
3. Create File Dictionary
4. Copy File Dictionary
5. Print File Descriptions
- 6.
- 7.
8. **Copy From:**  
File Name:   
Dictionary Item:
- 9.
- 10.
11. **Copy To:**  
File Name:   
Dictionary Item:
- 12.

Copy?:  Overwrite?:

INVENTORY REPORTS

Unassigned Menu

Unassigned Menu

Unassigned Menu

Unassigned Menu

Unassigned Menu

Options

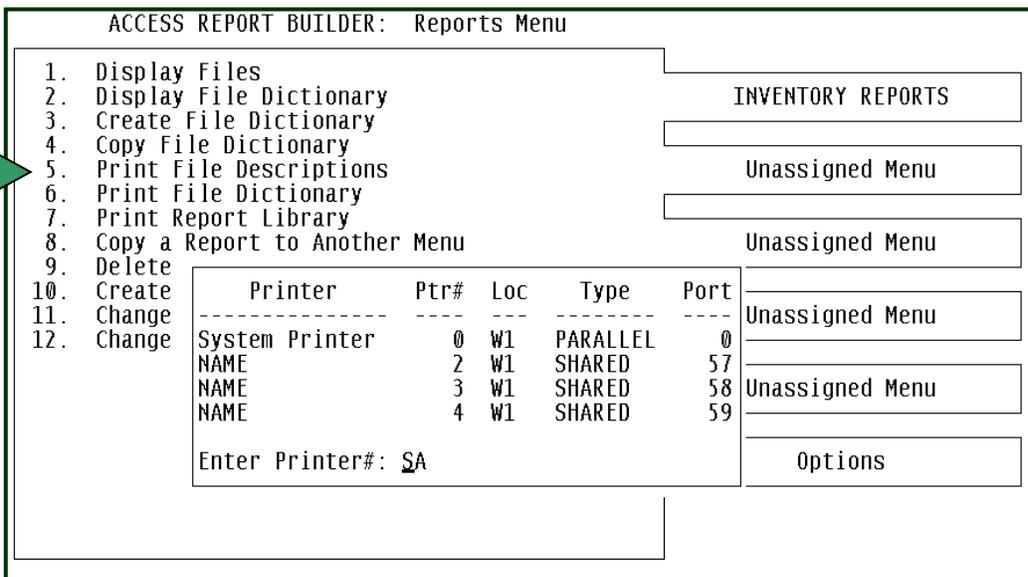
Enter the File Name containing the Dictionary Item

## Options Menu - Selection 5 – Print File Descriptions

## ACCESS Report Builder

Selection 5 on the Option Menu will print a report of the standard data files and their descriptions. This report can be used as a reference guide when locating a specific file for building a custom report.

After selecting item 5 of this menu the printer assignment window will appear allowing you to select the specific printer where this report should print. You will be given a list of printer names and their locations similar to the example shown below. Your specific system may have only one printer or several printers to choose from. Remember, the system printer (in the computer room near the CPU) is considered Printer-0 (printer zero).



ACCESS REPORT BUILDER: Reports Menu

1. Display Files
2. Display File Dictionary
3. Create File Dictionary
4. Copy File Dictionary
5. Print File Descriptions
6. Print File Dictionary
7. Print Report Library
8. Copy a Report to Another Menu
9. Delete
10. Create
11. Change
12. Change

Printer	Ptr#	Loc	Type	Port
System Printer	0	W1	PARALLEL	0
NAME	2	W1	SHARED	57
NAME	3	W1	SHARED	58
NAME	4	W1	SHARED	59

Enter Printer#: SA

INVENTORY REPORTS

Unassigned Menu

Unassigned Menu

Unassigned Menu

Unassigned Menu

Unassigned Menu

Options

## Options Menu - Selection 6 – Print File Dictionary

## ACCESS Report Builder

Selection 6 of the Option Menu will print the Data Dictionary of a specified file name. This data dictionary listing can be used as a reference guide when building custom reports. This listing will show the dictionary File Names that can be used when building the custom report.

When selecting item 6 of the Option Menu, you will be prompted to enter the name of the file as shown by the screen sample below. After entering the file name, you will be shown the printer selection window to choose the printer that will print this report.

At the file name prompt shown to the right, enter the name of the data file whose dictionary you want to print; such as the CUST-MAST file.

After entry, the printer assignment window will display.

ACCESS REPORT BUILDER: Reports Menu

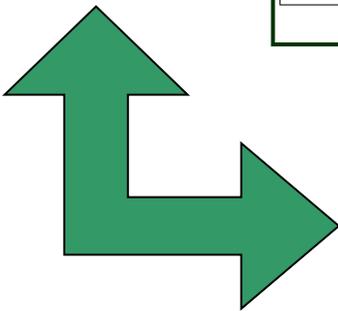
1. Display Files	
2. Display File Dictionary	INVENTORY REPORTS
3. Create File Dictionary	
4. Copy File Dictionary	
5. Print File Descriptions	Unassigned Menu
6. Print File Dictionary	
7. Print Report Library	
8. Copy a Report to Another Menu	Unassigned Menu
9. Delete a Report From Any Menu	
10. Create Report	
11. Change User P	Unassigned Menu
12. Change Global	

File Name: CUST-MAST\_

Unassigned Menu

Options

Enter the File Name



Printer	Ptr#	Loc	Type	Port
System Printer	0	W1	PARALLEL	0
NAME	2	W1	SHARED	57
NAME	3	W1	SHARED	58
NAME	4	W1	SHARED	59

Enter Printer#: SA

the

Enter a printer number (from the Ptr# column) and press the RETURN key. The report will be sent to that specific printer.

## Options Menu - Selection 7 – Print Report Library

When a custom report is built, the report definitions are stored in a report library. A printout of these report definitions can be used as a reference guide when constructing other reports. Selection 7 of the Options Menu will provide a printed listing of the ACCESS report definitions for a specific User or all reports of all Users in the Report Library.

The screen display below appears when selecting item 7 of the menu. The first prompt is entry of the User Initials. This will print just those reports of this User. Or, entering **ALL** at the initials prompt will instruct the software to print all of the report definitions that are stored in the Report Library. **Note: "ALL" can never be used as a User's initials.**

After entering the User initials, a Report Options window will appear. This will allow the reports library to be either displayed or printed. If printed, then you will be prompted for the spooler options and the number of copies.

After this, the printer assignment window will display to select the printer.

ACCESS REPORT BUILDER: Reports Menu

1.	Display Files		INVENTORY REPORTS
2.	Display File Dictionary		
3.	Create File Dictionary		Unassigned Menu
4.	Copy File Dictionary		
5.	Print File Descriptions		Unassigned Menu
6.	Print File Dictionary		
7.	Print Report Library		Unassigned Menu
8.	Copy a Report to Another Menu		
9.	Delete		Unassigned Menu
10.	Create	Enter User Initials, or ALL: MJM	Unassigned Menu
11.	Change		Unassigned Menu
12.	Change Glob	(D)isplay, or (P)rint: P Spool Options: (H,HS): HS Number of Copies: 1_	Unassigned Menu
			Options

Printer	Ptr#	Loc	Type	Port
System Printer	0	W1	PARALLEL	0
NAME	2	W1	SHARED	57
NAME	3	W1	SHARED	58
NAME	4	W1	SHARED	59

Enter Printer#: 0\_

Enter a printer number from the Ptr# Column  
And press the RETURN/ENTER key. The

Will be sent to that printer.

report

## Options Menu - Selection 8 – Copy a Report to Another Menu

When a report has been developed and needs to be distributed to other Users within the company, selection 8 will permit copying the report definitions to any other User's menu. This will be convenient when only one person in the company is responsible for developing the custom reports.

Selection 8 will display the following screen that will allow copying a report and its definitions:

1. Copy from a User's report menu to a different report menu.
2. Copy from one User's report menu to another User's report menu.

The following screen illustrates the 6 steps taken to copy a report and its definitions.

**Step 1:** Enter two sets of User initials. The 1<sup>st</sup> set of initials represents the User menus containing the report to be copied. The 2<sup>nd</sup> set of initials the User who will receive the copy of the report and its definitions.

Any valid set of initials may be entered. Notice in this example the initials are the same. This indicates that the copy will be performed within this User's menus.

ACCESS REPORT BUILDER: Reports Menu

1. Display Files	
2. Display File Dictionary	INVENTORY REPORTS
3. Create File Dictionary	
4. Copy File Dictionary	Unassigned Menu
5. Print File Descriptions	
6. Print File Dictionary	Unassigned Menu
7. Print Report Library	
8. Copy a Report to Another Menu	Unassigned Menu
9. Copy a Report to Another Menu	
10. Enter Originating User Initials....: MJM	Unassigned Menu
11. Enter Target User Initials.....: MJM	Unassigned Menu
12.	Unassigned Menu
	Options

**Step 2:** Having entered the User initials, the 5<sup>th</sup> report menus of the 1<sup>st</sup> User will display. Using the Up-arrow and Down-arrow keys, highlight the desired menu containing the report to be copied. Once highlight, press the RETURN/ENTER key.

ACCESS REPORT BUILDER: Reports Menu

1. Display Files	
2. Display File Dictionary	INVENTORY REPORTS
3. Create File Dictionary	
4. Copy File Dictionary	Unassigned Menu
5. Print File Descriptions	
6. Print File Dictionary	Unassigned Menu
7. Print Report Library	
8. Copy a Report to Another Menu	Unassigned Menu
9. Copy a Report to Another Menu	
10. Enter 0 > 5 Possibilities	Unassigned Menu
11. Enter T	
12.	Unassigned Menu
	Options

Select the menu containing the report to be copied

## ACCESS Report Builder

**Step 3:** The 1<sup>st</sup> User's report selections will now display. Using the Up-arrow and Down-arrow keys, highlight the specific report to be copied. Once highlighted, press the RETURN/ENTER key. This report and its definitions will be fetched for copying to the 2<sup>nd</sup> user.

ACCESS REPORT BUILDER: Reports Menu

1. Display Files		INVENTORY REPORTS
2. Display File Dictionary		
3. Create File Dictionary		Unassigned Menu
4. Copy File Dictionary		
5. Print File Descriptions		Unassigned Menu
6. Print File Dictionary		
7. Pr More	20 Possibilities	
8. Co >	PARTS WITH A QOH LESS THAN 0	Unassigned Menu
9. E	OPERATORS	
10. E	OPERATOR LISTING	Unassigned Menu
11. E	TRANSFERS WITH REQUESTING BRANCH W1	
12. E	PARTS WITH PURCHASE ORDER RECEIVED NOT POSTED	Unassigned Menu
	INVENTORY TAKE SHEET FOR W1	
	VENDOR REPORT	Unassigned Menu
	EXPORT LARGE REPORT	
	TESTING WILDCARDS	Options
	Open	

<ENTER> selects.

Select the report to be copied

**Step 4:** Next to be displayed are the report menus for the 2<sup>nd</sup> user. Using the Up-arrow and Down-arrow keys, highlight the report menu that will receive the report being copied.

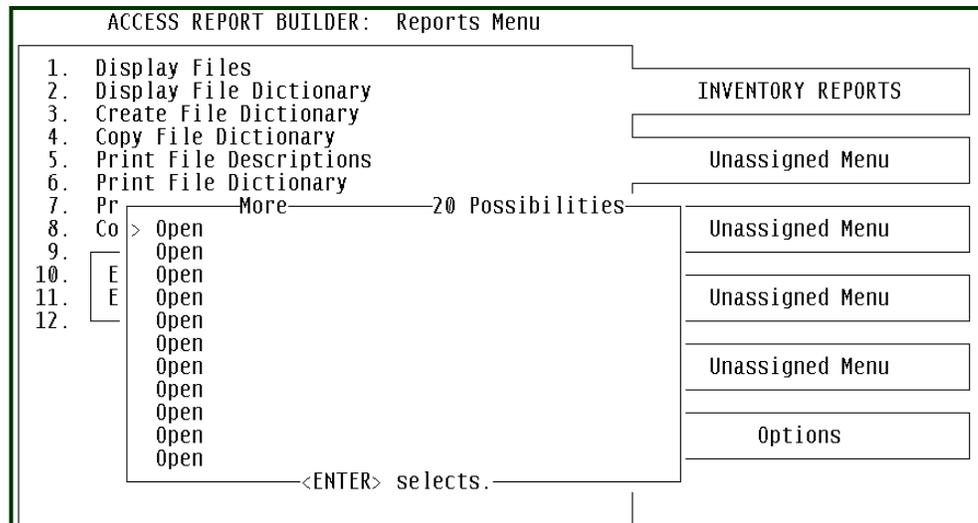
ACCESS REPORT BUILDER: Reports Menu

1. Display Files		INVENTORY REPORTS
2. Display File Dictionary		
3. Create File Dictionary		Unassigned Menu
4. Copy File Dictionary		
5. Print File Descriptions		Unassigned Menu
6. Print File Dictionary		
7. Print Report Library		Unassigned Menu
8. Copy a Report to Another Menu		
9. Copy a Report to Another Menu		Unassigned Menu
10. Enter 0	5 Possibilities	
11. Enter T	> Inventory Reports	Unassigned Menu
12. Enter T	Accounting Reports	
	Sales Reports	Unassigned Menu
	Personnel Reports	
	Miscellaneous Reports	Unassigned Menu
	<ENTER> selects.	Options

Select the menu containing the report to be copied

## ACCESS Report Builder

**Step 5:** With the report selections of the specific report menu now displayed, highlight the report selection entry that has the word "Open". Only an "Open" slot can be selected to receive the report being copied. In this example, all the report selections are "Open" and therefore any of the slots can be highlighted to receive the report.

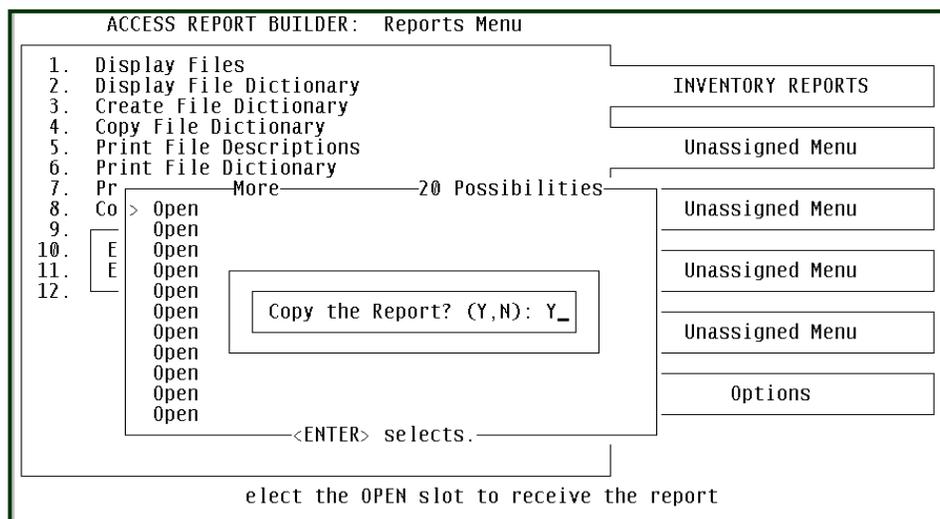


If there are no "Open" slots available, then the copy function has to be restarted with a different report menu selected. Or, a report that is no longer used must be deleted from the report menu, making it "Open" so the copy can be made to that specific report menu.

**Step 6:** As seen on the screen to the right, the first "Open" slot has been selected to receive the report. To execute the copy function, you will be asked to **Copy the Report** by entering **Y** or **N** in the message box shown.

Entering the letter **Y**, the copy function will be executed and the report and its definitions will be

copied to this User's report menu. If the letter **N** was entered, then the copy function is aborted and the User is returned back to the Options Menu.



**Note:** Copying a report to another menu does not remove it from the originating or

# ACCESS Report Builder

*source menu.*

## Options Menu - Selection 9 – Delete a Report From Any Menu

After developing reports for your Users, some of these reports may become obsolete, have no value and should be deleted from their reports menu. This option selection on the Options Menu should be password protected to prevent anyone except the System Manager from deleting reports from the ACCESS Report Builder system.

To delete a report, follow the screens below for each of the 4 steps in selecting the proper menu, then select the specific report to be deleted.

**Step 1:** Enter the User Initials for the User menu containing the report to be deleted.

```
ACCESS REPORT BUILDER: Reports Menu
1. Display Files
2. Display File Dictionary
3. Create File Dictionary
4. Copy File Dictionary
5. Print File Descriptions
6. Print File Dictionary
7. Print Report Library
8. Copy a Report to Another Menu
9. Delete a Report From Any Menu
10. Create Report Menu
11. Change User Password
12. Delete a Report from any Menu
    Enter User Initials.....:MJM_
INVENTORY REPORTS
Unassigned Menu
Unassigned Menu
Unassigned Menu
Unassigned Menu
Unassigned Menu
Options
```

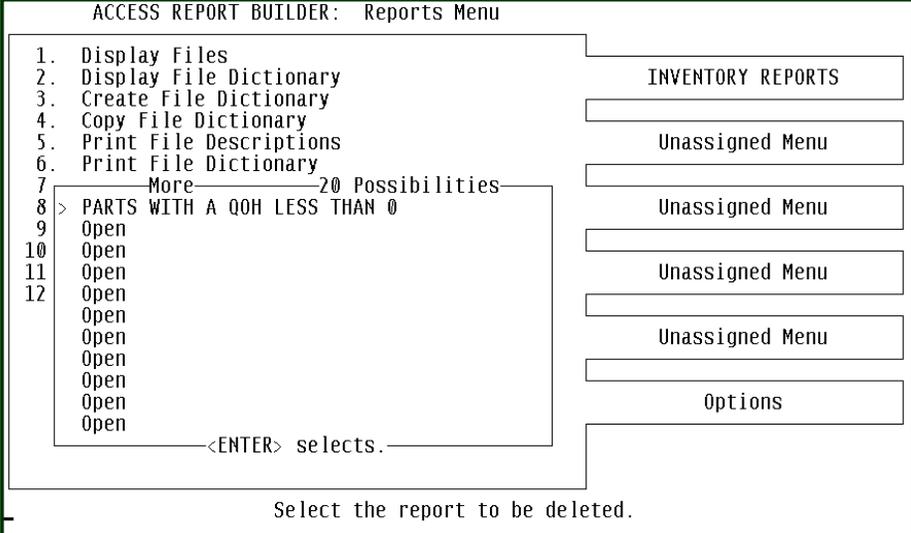
**Step 2:** When the User menu displays, use the Up-arrow and Down-arrow keys to highlight the specific report menu. Once highlighted, press the RETURN/ENTER key.

```
ACCESS REPORT BUILDER: Reports Menu
1. Display Files
2. Display File Dictionary
3. Create File Dictionary
4. Copy File Dictionary
5. Print File Descriptions
6. Print File Dictionary
7. Print Report Library
8. Copy a Report to Another Menu
9. Delete a Report From Any Menu
10. Create Report Menu
11. Change User Password
12. Delete a Report from any Menu
    5 Possibilities
    > Inventory Reports
    Accounting Reports
    Sales Reports
    Personnel Reports
    Miscellaneous Reports
    <ENTER> selects.
INVENTORY REPORTS
Unassigned Menu
Unassigned Menu
Unassigned Menu
Unassigned Menu
Unassigned Menu
Options

Select the menu containing the report to be deleted.
```

## ACCESS Report Builder

**Step 3:** Now that the report selections for this menu have displayed, use the Up-arrow and Down-arrow keys to highlight the specific report to be deleted. Once the report name has been highlighted, press RETURN/ENTER.



ACCESS REPORT BUILDER: Reports Menu

1. Display Files
2. Display File Dictionary
3. Create File Dictionary
4. Copy File Dictionary
5. Print File Descriptions
6. Print File Dictionary
7. More 20 Possibilities
- 8 > PARTS WITH A QOH LESS THAN 0
- 9 Open
- 10 Open
- 11 Open
- 12 Open

Options

INVENTORY REPORTS

Unassigned Menu

Unassigned Menu

Unassigned Menu

Unassigned Menu

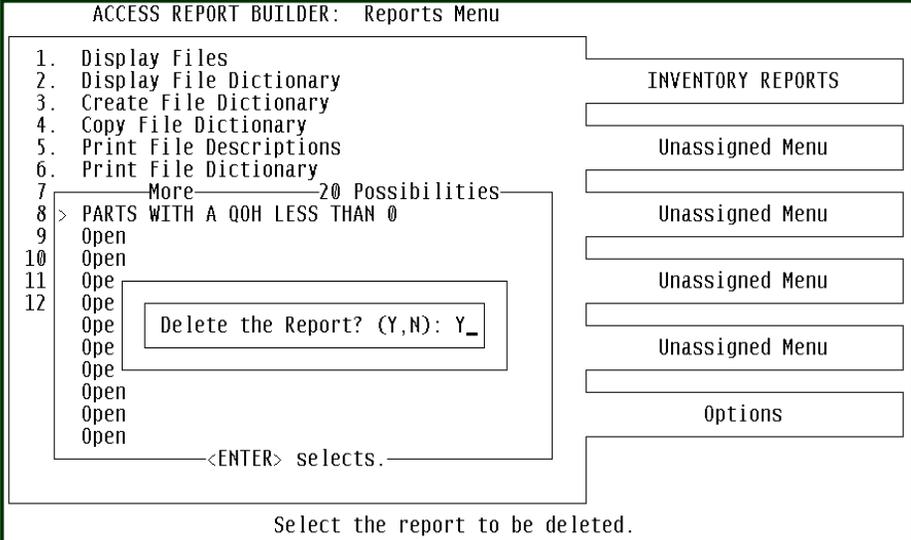
Unassigned Menu

Options

<ENTER> selects.

Select the report to be deleted.

**Step 4:** After selecting the specific report to be deleted, you will be prompted for the report deletion with the message box shown on the right. By entering the letter **Y**, the report will be deleted from the User's report menu. **Once deleted, there is no way to recover the report if deleted accidentally.**



ACCESS REPORT BUILDER: Reports Menu

1. Display Files
2. Display File Dictionary
3. Create File Dictionary
4. Copy File Dictionary
5. Print File Descriptions
6. Print File Dictionary
7. More 20 Possibilities
- 8 > PARTS WITH A QOH LESS THAN 0
- 9 Open
- 10 Open
- 11 Ope
- 12 Ope

Delete the Report? (Y,N): Y\_

Options

INVENTORY REPORTS

Unassigned Menu

Unassigned Menu

Unassigned Menu

Unassigned Menu

Unassigned Menu

Options

<ENTER> selects.

Select the report to be deleted.

Enter the letter **N** will abort the deletion selection and return you back to the Options Menu.

## Options Menu - Selection 10 – Change Report Menu

Selection 10 of the Options Menu will allow the User to create special menu titles for the 5 personal menus available to the User. As the number of the ACCESS reports begin to increase, organizing these reports into specific menus will assist in finding the exact report without having to pull up each menu and search for the desired report.

As shown, a display of the 5 menu titles will appear. You can select any of the 5 menus and enter a new menu title.

1. Display  
2. Display  
3. Create  
4. Copy Fi  
5. Print F  
6. Print F  
7. Print R  
8. Copy a  
9. Delete  
10.  
11.  
12.

1. Inventory Reports  
2. Accounting Reports  
3. Sales Reports  
4. Personnel Reports  
5. Miscellaneous Reports  
Selection Menu: 5

Inventory Reports  
Accounting Reports  
Sales Reports  
Personnel Reports  
Miscellaneous Reports  
Options

Menu Name: .....

Enter up to 25 characters to describe each menu.

Enter the name of this menu, up to 25 characters

When the User menus are initially established, each menu will have **Unassigned Menu** seen in each of the 5 menu bars.

Think of each of these five menus as a file drawer containing up to 20 reports. Therefore, each User menu will display up to 20 report selections for up to 100 reports per User. Each of the 20 report selections will have a report definition describing the preparation of a custom report.

### Options Menu - Selection 11 – Change Password

Selection 11 of the Options Menu will permit the entry or changing of the User's password that secures that User's reports menu. When the reports that have been built produce sensitive information, the User should password protect access to their reports menu.

A password entry window will appear allowing the entry of a new password or changing the present password. If a current password is to be deleted and removed entirely, then enter the letter **X** and the password will be deleted from this User's reports menu.

At the Password prompt, enter the password. This can be up to 5 alpha-numeric characters.

Entering the letter **X** will remove the existing password causing no security protection of the User's reports menu.

To change an existing password, simply type over it with the new password and press RETURN/ENTER.

ACCESS REPORT BUILDER: Reports Menu

1. Display Files
2. Display File Dictionary
3. Create File Dictionary
4. Copy File Dictionary
5. Print File Descriptions
6. Print File Dictionary
7. Print Report Library
8. Copy a Report to Another Menu
9. Delete a Report From Any Menu
10. Create Report Menu
11. Change User Password
12. Change Glob

Inventory Reports

Accounting Reports

Sales Reports

Personnel Reports

Miscellaneous Reports

Options

Password: .....

Enter the new Password.

## Options Menu - Selection 12 – Change Global Passwords

Maintaining proper security over the functionally sensitive files and capabilities is important for the proper use of the ACCESS Report Builder system. Several functions should be executed by experienced Users to prevent corruption of the database and their file dictionaries. Therefore, security is an important consideration prior to releasing the Report Builder to your staff.

There are several Global Passwords that can be entered to provide restricted access to the sensitive functions of the Report Builder. Selecting item 12 of the Options Menu will display the Global Password screen shown below. Each entry can have up to a 5-character alphanumeric password.

There are 7 items shown in the Global Password entry window. The 1<sup>st</sup> two are general passwords, while the last five are specific to the selection items found on the Options Menu.

You may enter a password on any of the seven items or none of the items.

The screenshot shows a terminal-style interface titled "ACCESS REPORT BUILDER: Reports Menu". It contains a list of 12 numbered items. Items 1 through 5 are general functions: "Display Files", "Display File Dictionary", "Create File Dictionary", "Copy File Dictionary", and "Print File Descriptions". Item 6 is "Global Passwords". Items 7 through 12 are password prompts for specific functions: "Password permitting Global Password changes", "Password permitting access to Report Builder", "Password permitting report modifications", "Password permitting creation of dictionary items", "Password permitting copying dictionary items", "Password permitting copying Report Definitions", and "Password permitting deletion of any report". To the right of the list are several input fields, some with labels: "Inventory Reports", "Accounting Reports", "ports", "Reports", "s Reports", and "Options". At the bottom, a status bar reads "Enter the Global Passwords to be used throughout the ACCESS Report Builder."

## ACCESS Report Builder

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### **An Explanation of these 7 Password items are:**

**Password permitting Global Password changes** – Should any of the Global Passwords be required, then the System Manager should enter a unique password on this item to prevent unauthorized changes to any of the Global Passwords. In other words, a password to secure other passwords.

**Password permitting access to Report Builder** – Should you wish to allow only certain users on the system to have access to the Report Builder off of the Menu, then place a password on this item. Then anytime the ACCESS Report Builder is selected from the normal menus, a Password entry prompt will be required permitting entry into the Report Builder.

**Password permitting report modifications** – Should you want only certain Users to modify their report definitions of those reports on their menu, then place a password on this item. This password would prevent any User that does not have this password from changing the report definitions of those reports placed on their menus. You may have only certain Users create the reports and copy the report to the menus of those Users who need to run them. This way, only certain Users can build and change the reports while other Users can only run and not change their reports.

**Password permitting creation of dictionary items** – Creating dictionary items is a practice that should be reserved for the most experienced ACCESS User. Understanding file dictionaries and how they are constructed is usually something that a few Users are capable of. The **creation of dictionary items** function should be password protected on all systems to prevent the creation of invalid dictionary items or the wrecking of those existing dictionary items provided by AutoPower.

**Password permitting copying dictionary items** – For the same reason mentioned above, copying dictionary items can be fatal if performed indiscriminately by an inexperienced User. It is required that file dictionaries and their structure be understood prior to giving access to this feature. The password assigned to the above feature can be used on this item also.

**Password permitting copying of Report Definitions** - When a report has been defined and is ready for production or distribution to the Users, then the report definitions can be copied to

## ACCESS Report Builder

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another User's menu. This prevents having to re-enter the definitions repeatedly for each User that would like to run the report. This would be used by the System Manager who may have sole responsibility of creating the report definitions. A password on this item would prevent the copying of any report to any other menu. There may be reports that produce sensitive information that should be run only from specific User menus. Preventing the indiscriminant copying of report definitions will keep sensitive information secure.

**Password permitting deletion of any report** – When reports have been added to the User menus and are no longer meaningful and have little or no value, then they can be deleted off that User's menu. Deleting the report will re-open that menu selection for making it available for a new report or copying any existing report definition.

**Password premitting access to Report Builder** – Should you wish to allow only certain users on the system to have access to the Report Builder off of the Menus, then place a password on this item. Then anytime the ACCESS Report Builder is selected from the normal menus, a Password entry prompt will be required permitting entry into the Report Builder.

## **Section 3**

# **Using Access – Creating & Running Reports**

### Creating a Customer Access Report

Now that you feel brave enough to create a custom report, the following pages will explain the steps to make your first report successful. The custom report to be created through this tutorial will be an alphabetized customer listing of Accounts Receivable account balances.

#### Your First Report:

The report will show the customer account number, customer name, phone number, salesman number, credit limit, and the customer's AR balance. The report will be sorted by the customer's name with a total at the end of the report of the AR balance column. Sounds like this could be a useful report, so let's begin.

#### Planning Your Report:

But first, before creating any report, you should think about the report format, that is, what information will be on the report and how it will look, or:

- What data fields to be on the report, and will any of the numeric columns be totaled.
- How the information will be sorted.
- If all the data records in the file are to be included or just certain records.
- The name of the report to be placed on the menu.

For our sample report, it will be sorted by the customer name, select only those customers associated with branch location of W1, and customers with a credit limit of \$250 or higher and with a positive AR balance. Further, the AR balance column will be totaled at the end of the report. This report can be given to the W1 branch manager for use in reviewing the customer AR balances as well as accounts that are over their credit limit. The layout of the report columns will look like this:

<b>ACCTNO</b>	<b>NAME</b>	<b>PHONE</b>	<b>SLSMAN-NO</b>	<b>CREDIT-LIMIT</b>	<b>AR-BALANCE</b>
---------------	-------------	--------------	------------------	---------------------	-------------------

#### Practice, Practice, Practice:

This simple report will demonstrate many of the features of the ACCESS Report Builder. Beginning with simple reports and some practice, you will become proficient in creating more sophisticated reports from any data file. It is with this constant practice that creating reports will be quick & easy. Soon you will become a virtuoso. Remember, creating your own reports will save you time and money.

## ACCESS Report Builder

### Building the Report – Getting Started

Of course, you have to read the part of this manual describing how to get into the ACCESS Report Builder haven't you? If not, then you may not be prepared to continue with this section. The rest of you with a strong heart, let's go.

Launch into the Report Builder off your menu and enter your initials thus bringing up your own set of menus. Since this will be your 1<sup>st</sup> report, you may not have defined your menus yet. Don't worry about that now, you can do it later after several reports have been created and you have a better feel for the type of menus you will need and what menu names are to be assigned.

With the 1<sup>st</sup> menu bar on the left now highlight, a message the bottom of the screen is telling you to "arrow-up or down" to highlight any of the 5 menu bars. However, in this exercise, simply press ENTER/RETURN key to select the 1<sup>st</sup> menu bar. Then you will see displayed its 20 reports designated as being "Open". This means that no reports have been defined and created for this specific menu.

The prompt at the bottom of the screen, **Enter Selection Number**, is asking for you to enter any one of the 20 report items. Since this is your 1<sup>st</sup> report on this menu, enter a **1** at the prompt.

You could have entered any number, 1 to 20, to select an "Open" report slot. Later on when you are creating new reports, you can select any "Open" report slot. It does not matter if you pick a number in the middle or from the bottom of the menu, just as long as you choose an "Open" report slot.

ACCESS REPORT BUILDER: Reports Menu

1. Open	UNASSIGNED MENU
2. Open	UNASSIGNED MENU
3. Open	UNASSIGNED MENU
4. Open	UNASSIGNED MENU
5. Open	UNASSIGNED MENU
6. Open	UNASSIGNED MENU
7. Open	UNASSIGNED MENU
8. Open	UNASSIGNED MENU
9. Open	UNASSIGNED MENU
10. Open	UNASSIGNED MENU
11. Open	UNASSIGNED MENU
12. Open	UNASSIGNED MENU
13. Open	UNASSIGNED MENU
14. Open	UNASSIGNED MENU
15. Open	UNASSIGNED MENU
16. Open	UNASSIGNED MENU
17. Open	Options
18. Open	
19. Open	
20. Open	

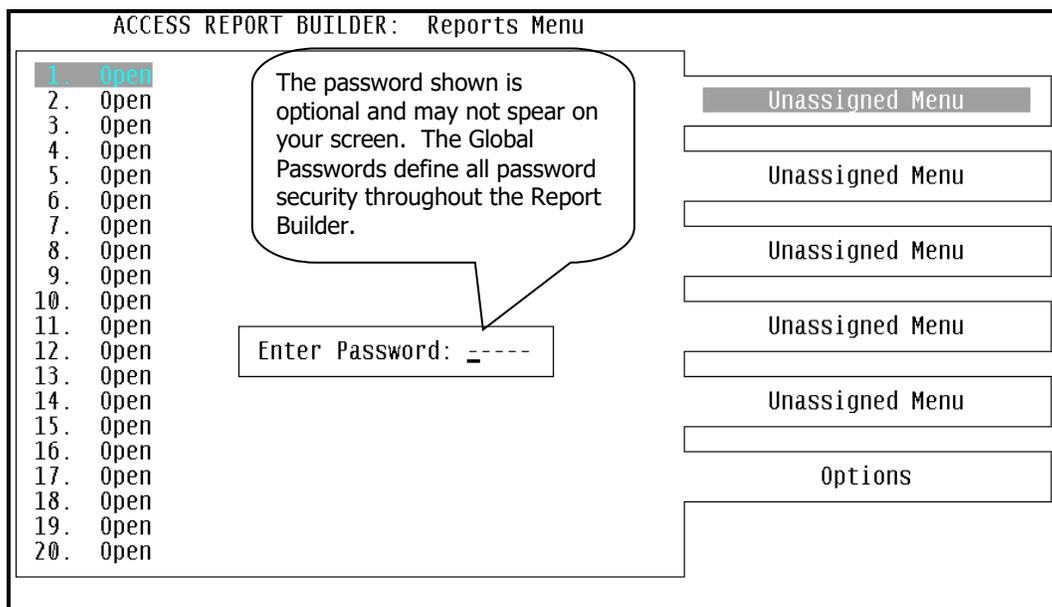
Use arrow keys to highlight a menu. Press RETURN to select. ESC to quit

## ACCESS Report Builder

### Building the Report (cont'd)

When selecting the first "Open" report slot, you may get a Password Window requiring the entry of a security password. Some System Managers will require a password entry premitting the creation of a new report. **Note:** This password as well as others are managed by the Global Password maintenance selection available from the Options Menu.

If a password is required, or not, you will be presented the Report Definitions screen from which your sample report, described on the previous pages, will be created.



The Report Definition screen will be used to create the report. The following pages describe the use of the Report Definition screen, its features and options. It will be this section of the manual that will receive the most interest.

## ACCESS Report Builder

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### Building the Report (cont'd)

Recalling the previous few pages, an AR Balance report will be created. This report will be formatted with the data fields as seen below. It will be sorted by customer name, selecting only those customers associated with branch location of W1, and customers with a credit limit of \$250 or higher, and with a positive AR balance. Further, the AR balance column will be totaled at the end of the report. The layout of the report columns will look like this:

<b>ACCTNO</b>	<b>NAME</b>	<b>PHONE</b>	<b>SLSMAN-NO</b>	<b>CREDIT-LIMIT</b>	<b>AR-BALANCE</b>
---------------	-------------	--------------	------------------	---------------------	-------------------

Building the report will require several steps. These steps, while easy to learn, will give you control over the construction of any custom report. Some of these steps are required, and others are optional. As each step is explained, you will be informed of which step is necessary and which are optional. As a matter of fact, these steps don't even have to be completed in any order.

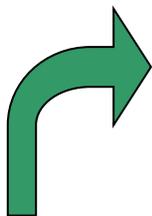
The 7 steps in constructing a report are:

1. Enter Report Description
2. Select the Report Verb
3. Select a Data File
4. Enter the Data Selection Criteria
5. Enter Sort Fields
6. Enter the Output Fields
7. Enter the Report Heading

Each of the seven steps will be described through the following pages of this section. At the end of this section will be an example of the resulting customer report. So if you're ready, let's begin.

### Building the Report – Report Description

Once a Report Definition screen appears, the cursor will stop at the Report Description input field. Enter up to 40 characters for the description of the report that will then be placed on the Reports Menu. Enter a report description that will adequately describe the report since this description will help identify the specific report on the menu to be run.



The Report Definition screen, shown here, will be used to build this report. The 1<sup>st</sup> thing to do is enter the Report Description. **This is a mandatory entry.**

ACCESS REPORT BUILDER: Report Definition

Report Description: CUSTOMER ACCOUNTS RECEIVABLE LISTING...]

Verb File Name Selection-Criteria Sort-Method Output-Fields Heading

ACCESS Command Sentence: \_\_\_\_\_ Report Width: \_\_\_\_\_

Enter the report name that will appear on the Reports Menu.

### Report Description:

Before creating the report and its contents, you must enter a Report Description. What you enter here will be placed on the Reports Menu. This description will replace the word "Open" on the report slot you selected. In this case, the first report slot. Remember?

At the Report Description prompt above, the report name that will appear on the Reports Menu has been entered. The report name, **Customer Accounts Receivable Listing**, will replace the word "Open" on the Reports Menu. There is room for a report name of 40 characters long. Since the report name entered here will appear on the menu, try creating a name that is unique for the type of report and its contents. Later, when there are several reports on the menu, the report name will be meaningful and will avoid confusion with similar reports on the same menu.

#### **FYI:**

The Report Description is not used as the report heading. Adding a Report to the definitions is easy. You will have up to 3 heading lines that can be entered.

## ACCESS Report Builder



### Building the Report – Select the Report Verb

The Report Verb is the main command that drives the entire report. The report verbs to be selected will be:

- LIST** This Report Verb will present the data selected in a random order. That is, the data will be printed or displayed in no particular sequence. The **LIST** verb won't be used when the report is to be printed in a specific sequence, such as by part number or customer number.
- SORT** The **SORT** verb will organize the data records from the data file into a sequence that you will define. Such as "by part number", "by customer name", or "by descending year-to-date sales". The Field Sorting Sequence will be explained in Step 5. There can be up to 5 sort fields defined for a report.

After entering the Report Description, the first of 6 report definition segments, **VERB**, will be highlighted. **Every report must have a verb.**

Notice the help message at the bottom of the display? By using the Left-arrow or Right-arrow keys, you will be able to highlight any of the other five report segments.

ACCESS REPORT BUILDER: Report Definition

Report Description: CUSTOMER ACCOUNTS RECEIVABLE LISTING

Verb File Name Selection-Criteria Sort-Method Output-Fields Heading

ACCESS Command Sentence: \_\_\_\_\_ Report Width: \_\_\_\_\_

Highlight a section of the ACCESS command, press RETURN, or ESCape

With the **VERB** highlighted, press the RETURN/ENTER key. Then, the input field will be displayed for you to enter any of the available report verbs, such as **LIST, SORT, etc.**

If you want to see a selection window of the available report verbs, at the **VERB** input field, enter a "?" and press the RETURN/ENTER key.

## ACCESS Report Builder



### Building the Report – Select the Report Verb (cont'd)

By entering "?" at the **VERB** input field, the Verb selection window will display. The first entry in the window, **LIST**, is highlighted. By using the Up-arrow or Down-arrow keys you will be able to highlight any of the other Verbs. Highlight the Verb you wish to use, in this case the **SORT** Verb, press the RETURN/ENTER key.

Of course, if you know the Verb to be used for your report then it can be entered at the Verb input field.

#### FYI:

With the Verb Selection Window displayed, and you do not wish to choose any of these Report Verbs, then press the Escape key, ESC

ACCESS REPORT BUILDER: Report Definition

Report Description: CUSTOMER ACCOUNTS RECEIVABLE LISTING

Verb File Name Selection-Criteria Sort-Method Output-Fields Heading

?

> LIST  
SORT  
XPORT  
COUNT  
SUM

<ENTER> selects.

5 Possibilities

Make selection from the list box

ACCESS Command Sentence: \_\_\_\_\_ Report Width: \_\_\_\_\_

ACCESS REPORT BUILDER: Report Definition

Report Description: CUSTOMER ACCO

Verb File Name Selection-Crit

SORT

The VERB Input field above will prompt for the entry of any of the available report Verbs or a "?". Should the "?" be entered, then the Verb Selection Window will appear.

By highlighting the **SORT** verb in the selection window, it will be placed into the Verb input field.

Getting familiar with the Report Verbs, the appropriate Verb can be entered into the Verb input field, by passing the optional display of the Verb selection window.

After the Report Verb has been entered, then the second Report segment, **FILE NAME**, will be highlighted.

## ACCESS Report Builder

### 3 Building the Report – Select a File Name

All the data in your system is stored in many data files. Each data file contains information of specific nature. For example, the Customer Master file, CUST-MAST, contains information specific to the customers to whom you sell goods and services. This file will contain the customer name, address, salesman number, a variety of code fields, etc.

With the **FILE NAME** highlighted, press the RETURN/ENTER key. A File Name input field will be displayed.

ACCESS REPORT BUILDER: Report Definition

Report Description: CUSTOMER ACCOUNTS RECEIVABLE LISTING

Verb File Name Selection-Criteria Sort-Method Output-Fields Heading

SORT CUST-MAST\_

ACCESS Command Sentence: \_\_\_\_\_ Report Width: \_\_\_\_\_

Enter the File Name, or ?

ACCESS REPORT BUILDER: Report Definition

Report Description: CUSTOMER ACCOUNTS RECEIVABLE LISTING

Verb File Name Selection-Criteria Sort-Method Output-Fields Heading

SORT ?

MoreTER> selects.ilities

- > AFM
- AR-AGEHIST
- AR-BADCHECK
- AR-COLL
- AR-COMM
- AR-DSR
- AR-INVREG
- AR-MTDCJ
- AR-MTDIR
- AR-SUMMARY
- AR-TAXCARD
- AR-TERMS
- AR-YTDCJ
- AR-YTDIR
- CASH-JRNL
- CH-HIST
- CUST-HIST
- CUST-MAST

ACCESS Command Sentence: \_\_\_\_\_

Loading data fil

Any of the available file names can be entered here. If the file name you wish to enter is not known, then enter "?" and the File Name selection window will appear.

Or, by entering a "?" at the File Name input field, the File Name selection window will be displayed. The files will appear in alphabetical order.

Using the Up-arrow or Down-arrow keys, highlight the file

name you wish to select. For our sample report, use the Down-arrow key to highlight and select the Customer Master file, **CUST-MAST**.

With the **CUST-MAST** file name highlighted, press the RETURN/ENTER key. The file name selected will then appear in the File Name input field.

## ACCESS Report Builder

---



### Building the Report – Select a File Name (cont'd)

After entering the file name, at the bottom of the screen will appear the ACCESS command sentence. This command sentence will be constructed as each of the six Report Definition segments are used.

In front of each line making up the Command Sentence are single letters representing four portions of the Sentence. These letters, **V, S, O, and H** represent Verb, Selection Criteria, Output, and Heading respectively.

ACCESS Command Sentence: _____	Report Width: _____
V: SORT THE CUST-MAST FILE	
S:	
O:	
H:	
H:	
H:	
Highlight a section of the ACCESS command, press RETURN, or ESCape	

Those of you who are familiar with the ACCESS report writer will recognize the structure of the Command Sentence. If you do, then you will notice that the Command Sentence seen is the same command line you would enter at TCL when creating such a report.

# 4

## Building the Report – Enter the Data Selection Criteria

Now that the Verb and File Name have been entered, the next report segment to be considered is the **Selection Criteria**. The Data Selection Criteria identifies the type of data in the file to be selected for the report. Often times, there will be thousands of data records in the files, therefore, printing reports containing thousands of data records is too cumbersome to review.

Therefore, by identifying what data records to be selected will help reduce the length of the report and allow isolating the specific information for review.

### Using the Selection Criteria in your report is optional.

With the **Selection-Criteria** segment highlighted, press the RETURN/ENTER key. The four data selection criteria entry fields will be displayed. The cursor will

appear at the "With field Name" on line one. Notice the help message at the bottom of the screen shows the option of entering "?" to display the Field Name selection window.

ACCESS REPORT BUILDER: Report Definition

Report Description: CUSTOMER ACCOUNTS RECEIVABLE LISTING

Verb File Name Selection-Criteria Sort-Method Output-Fields Heading

SORT CUST-MAST

**Selection Criteria:**

AND/OR	WITH FIELD NAME	LOGICAL	VALUE
1.	-----	EQ	-----
2. AND	-----	EQ	-----
3. AND	-----	EQ	-----
4. AND	-----	EQ	-----

ACCESS Command Sentence: \_\_\_\_\_ Report Width: \_\_\_\_\_

V: SORT THE CUST-MAST FILE

S:

O:

H:

H:

H:

Enter the Field Name, or ?

At the "With Field Name" input field, enter **ARBAL**. This field name represents the customer's current AR Balance. After entering the field name, the cursor will move over to the "LOGICAL" column.

ACCESS REPORT BUILDER: Report Definition

Report Description: CUSTOMER ACCOUNTS RECEIVABLE LISTING

Verb File Name Selection-Criteria Sort-Method Output-Fields Heading

SORT CUST-MAST

**Selection Criteria:**

AND/OR	WITH FIELD NAME	LOGICAL	VALUE
1.	ARBAL	GT	-----
2. AND	-----	EQ	-----
3. AND	-----	EQ	-----
4. AND	-----	EQ	-----

ACCESS Command Sentence: \_\_\_\_\_ Report Width: \_\_\_\_\_

V: SORT THE CUST-MAST FILE

S:

O:

H:

H:

H:

Toggle your choices by pressing the Space Bar

# 4

## Building the Report – Enter the Data Selection Criteria (cont'd)

The "LOGICAL" column contains several choices. The choices are seen as 2 letter abbreviations representing what are called Logical Operators. With the cursor positioned under the "Logical" column, these logical operators can be seen by pressing the Space Bar. The Space Bar will toggle each of the choices. The possible choices are: **EQ, NE, GT, GE, LT and LE**. By using any of these logical operators, specific data records can be selected for the report. The definition of these logical codes are:

- EQ Equal To
- NE Not Equal To
- GT Greater Than
- GE Greater Than or Equal To
- LT Less Than
- LE Less Than or Equal To

In the case of our sample report, only those customers with an AR balance greater than zero are to be selected. Press the Space Bar until **GT** is seen. With **GT** now displayed, press the RETURN/ENTER key.

The cursor now moves over to the **VALUE** column. In this input field, enter a zero. If you wanted to select those customers with an AR Balance over \$200.00 then you would enter **200.00** in this input field.

ACCESS REPORT BUILDER: Report Definition

Report Description: CUSTOMER ACCOUNTS RECEIVABLE LISTING

Verb File Name Selection-Criteria Sort-Method Output-Fields Heading

SORT CUST-MAST

Selection Criteria:

AND/OR	WITH FIELD NAME	LOGICAL	VALUE
1.	ARBAL	GT	0-----
2. AND	-----	EQ	-----
3. AND	-----	EQ	-----
4. AND	-----	EQ	-----

ACCESS Command Sentence: \_\_\_\_\_ Report Width: \_\_\_\_\_

V: SORT THE CUST-MAST FILE

S:

O:

H:

H:

H:

Enter the data value to be selected, or (?)

After entering the data Value, the cursor will be positioned on the 2<sup>nd</sup> line under the "AND/OR" column. Having 2 or more entries in the Selection Criteria table will create a "Compound Selection Criteria".

Under the **VALUE** column, you can also enter "(?)". When you enter a ? surrounded with parentheses, it allows you to enter a value when you run the report. If you enter a value, it will ALWAYS run for that value.

AND/OR	WITH FIELD NAME	LOGICAL	VALUE
1.	ARBAL	GT	(?)-----
2. AND	-----	EQ	-----
3. AND	-----	EQ	-----
4. AND	-----	EQ	-----

ACCESS Command Sentence: \_\_\_\_\_ Report Width: \_\_\_\_\_

V: SORT THE CUST-MAST FILE

S: WITH ARBAL GT (?)

O:

H:

H:

H:

Enter the data value to be selected, or (?)

# ACCESS Report Builder

## 4

### Building the Report – Enter the Data Selection Criteria (cont'd)

The "AND/OR" column is used when more than one data selection criteria line will be used. By combining more than one field name, the data selection criteria can become sophisticated enough to select specific data records from the data file.

ACCESS REPORT BUILDER: Report Definition

Report Description: CUSTOMER ACCOUNTS RECEIVABLE LISTING

Verb File Name Selection-Criteria Sort-Method Output-Fields Heading

SORT CUST-MAST Present

**Selection Criteria:**

AND/OR	WITH FIELD NAME	LOGICAL	VALUE
1.	ARBAL	GT	0
2.	LOC	EQ	W1_-----
3.	-----	EQ	-----
4.	-----	EQ	-----

ACCESS Command Sentence: \_\_\_\_\_ Report Width: \_\_\_\_\_

V: SORT THE CUST-MAST FILE  
S: WITH ARBAL GT "0"  
O:  
H:  
H:  
H:

Enter the data value to be selected, or (?)

Using the Field Name Selection Window Option, at the "With Field Name" input field, by entering a ?, the Data Dictionary for the file will be displayed in a selection window. The example of the use of the ? option is shown below for the Customer Master file.

As with any selection window, use the Up-arrow and Down-arrow keys to highlight the field name to be selected. When the field name is highlighted, press the RETURN/ENTER key to select the data field. But, if no selection is made, then press the Escape key and the selection window will be removed from the screen and no field name will be chosen.

ACCESS REPORT BUILDER: Report Definition

Report Description: CUSTOMER ACCOUNTS RECEIVABLE LISTING

Verb File Name Selection-Criteria Sort-Method Output-Fields Heading

SORT CUST-MAST Present

**Selection Criteria:**

AND/OR	WITH FIELD NAME	LOGICAL	VALUE
1.	ARBAL	GT	0
2.	LOC	EQ	W1
3.	?-----	EQ	-----
4.	-----	EQ	-----

ACCESS Command Sentence: \_\_\_\_\_

V: SORT THE CUST-MAST FILE  
S: WITH ARBAL GT "0" AND WITH LOC EQ "W1"  
O:  
H:  
H:  
H:

More—122 Possibilities

- > ACCT
- ADDR1
- ADDR2
- AMCS
- CITY/ST/ZIP
- CUSTNO
- ACCTNO
- ARBAL
- AVG-MON
- BILL-TAX
- CHK
- CITY-ST
- CITY/ST

<ENTER> selects. \_\_\_\_\_

Loading file dictionary...

## ACCESS Report Builder

### 4

### Building the Report – Enter the Data Selection Criteria (cont'd)

Having entered all three data fields to be used to select specific customers from the Customer Master file, the screen display below illustrates how the Selection Criteria fields should be entered.

```
ACCESS REPORT BUILDER: Report Definition
Report Description: CUSTOMER ACCOUNTS RECEIVABLE LISTING
Verb File Name Selection-Criteria Sort-Method Output-Fields Heading
SORT CUST-MAST Present
Selection Criteria:
AND/OR WITH FIELD NAME LOGICAL VALUE
1. ARBAL GT 0
2. AND LOC EQ W1
3. AND CREDIT GE 250
4. OR ----- EQ -----
ACCESS Command Sentence:-----Report Width:
V: SORT THE CUST-MAST FILE
S: WITH ARBAL GT "0" AND WITH LOC EQ "W1" AND WITH CREDIT GE "250"
O:
H:
H:
H:
Press the Space Bar to toggle your choices
```

The ACCESS Command Sentence shown at the bottom of the screen also illustrates the ACCESS command built so far.

At this point in the development of the Report Definitions, the report to be produced from the data in the Customer Master file will be of only those customers with an AR Balance greater than zero, and associated with the W1 branch location, and with a credit limit equal to or greater than \$250.00.

The next step will be to define how the customer's data records will be sorted. The next section will discuss the "Sort Method" and its options.

**5**

**Building the Report – Enter the Sort Fields**

The "Sort-Field" is highlighted upon completion of the entries to the "Selection-Criteria". This definition segment is optionally used to define how the data records that are selected are to be sorted. There are four sort fields that can be entered.

The three columns used by the Sorting Method segment are:

Sort Method	There are two features in this column. The "BY" and "BY-DSND" sort features will sort a specific data field in ascending or descending order. Using the Space Bar will toggle between these two sorting methods.
Field Name	The data field to be sorted is entered in this column. Of course, the data field must be a field name contained in the data dictionary of the data file used by this report. The ? option can be entered in the field to display the Field Name selection window.
Break-On	Level breaks can be engaged by entering <b>YES</b> under this column. With the default set at <b>NO</b> , use the Space Bar to toggle between <b>NO</b> and <b>YES</b> .

Highlight the Sort-Method segment, press the RETURN/ENTER key to display the Sort Method entry fields.

The cursor will be positioned under the Sort Method column on line one. See the help message at the bottom of the screen for the action options.

```

ACCESS REPORT BUILDER: Report Definition
Report Description: CUSTOMER ACCOUNTS RECEIVABLE LISTING
Verb File Name Selection-Criteria Sort-Method Output-Fields Heading
SORT CUST-MAST Present

Sort Methods: Field Name Break-On Page
1. - BY ----- NO NO
2. BY ----- NO NO
3. BY ----- NO NO
4. BY ----- NO NO

ACCESS Command Sentence: Report Width:
V: SORT THE CUST-MAST FILE
S: WITH ARBAL GT "0" AND WITH LOC EQ "W1" AND WITH CREDIT GE "250"
O:
H:
H:
H:
Toggle to Highlight for Ascending sort or Descending sort, or ESCape
    
```



### Building the Report – Enter the Sort Fields (cont'd)

At the Sort Method column with **BY** set, press the ENTER key. Then enter **NAME** at the input field under the "Field Name" column, press ENTER. Then with **NO** under the "Break-On" column highlighted, press ENTER.

If you want a page break between each break, then with your cursor under the "Page" column, use your space bar to change **NO** to **YES**.

You have just set up the report to sort the customers by the company name into ascending order with no level break. If an additional data field is to be sorted, then the 2<sup>nd</sup> through 4<sup>th</sup> lines can be used.

ACCESS REPORT BUILDER: Report Definition

Report Description: CUSTOMER ACCOUNTS RECEIVABLE LISTING

Verb	File Name	Selection-Criteria	Sort-Method	Output-Fields	Heading
SORT	CUST-MAST	Present			

Sort Methods:	Field Name	Break-On	Page
1. BY	NAME	NO	NO
2. - BY	-----	NO	NO
3. BY	-----	NO	NO
4. BY	-----	NO	NO

ACCESS Command Sentence: \_\_\_\_\_ Report Width: \_\_\_\_\_

V: SORT THE CUST-MAST FILE BY NAME  
S: WITH ARBAL GT "0" AND WITH LOC EQ "W1" AND WITH CREDIT GE "250"  
O:  
H:  
H:  
H:

Toggle to Highlight for Ascending sort or Descending sort, or ESCape

### Multiple Sort Fields

Multiple sort fields could be used for this report. For example, if you wanted this AR Balance report to be sorted by Salesman Number and then by the Customer Name, then an entry would be made on both lines 1 and 2.

For this 2 field sort, line one would show **BY** under the "Sort Method" column and **SLSMAN** would be entered under the Field Name column. You could enter **YES** under the "Break-On" column to produce a level break between each salesman. You could also enter **YES** under the "Page" so that when data for a new salesman prints, it will start on its own page. This would enable you to give a section to each salesman.

On the second line, you would enter **BY** under the "Sort Method" column and **NAME** under the "Field Name" column, **NO** under the "Break-On" and "Page" columns.

## ACCESS Report Builder



### Building the Report – Enter the Output Fields

The data to appear on your report will be defined by the Output Fields segment of the Report Builder. There are up to 16 data fields that can be entered on a single report, but most reports will have far fewer than this. **At least one Output is required.**

By highlighting the Output-Fields and pressing the RETURN/ENTER key, the screen shown below will be displayed. The empty 16 input fields will appear. The cursor will stop at Line 1 for the entry of the first data field.

#### FYI:

When entering the Field Names, the order they are entered (1-16) will be the same order the data fields will appear horizontally across the report heading. Put in some planning when designing your report. As people read left to right, consider the placement of the data on your report for meaningful and effective use of its information.

```
ACCESS REPORT BUILDER: Report Definition
Report Description: CUSTOMER ACCOUNTS RECEIVABLE LISTING
  Verb  File Name  Selection-Criteria  Sort-Method  Output-Fields  Heading
SORT  CUST-MAST      Present           Present
-----
Output Fields
1.  -----  9.  -----
2.  -----  10. -----
3.  -----  11. -----
4.  -----  12. -----
5.  -----  13. -----
6.  -----  14. -----
7.  -----  15. -----
8.  -----  16. -----
ACCESS Command Sentence: Report Width: 0
V: SORT THE CUST-MAST FILE BY NAME
S: WITH ARBAL GT "0" AND WITH LOC EQ "W1" AND WITH CREDIT GE "250"
O:
H:
H:
H:
Enter the Field Name, (D)delete to delete a Field Name, or ?
```

At each of the 1 through 16 input fields, you can enter any Field Name contained in the Data Dictionary of the data file, in this case the CUST-MAST file. If the Field Name you want to add to the report is not known, then the ? is available.

See the help message at the bottom of the screen. You can use the ? at any of the 16 input fields. To call up the Field Name selection window, just enter the ? and press the ENTER/RETURN key. The next page will illustrate the use of the ? option.

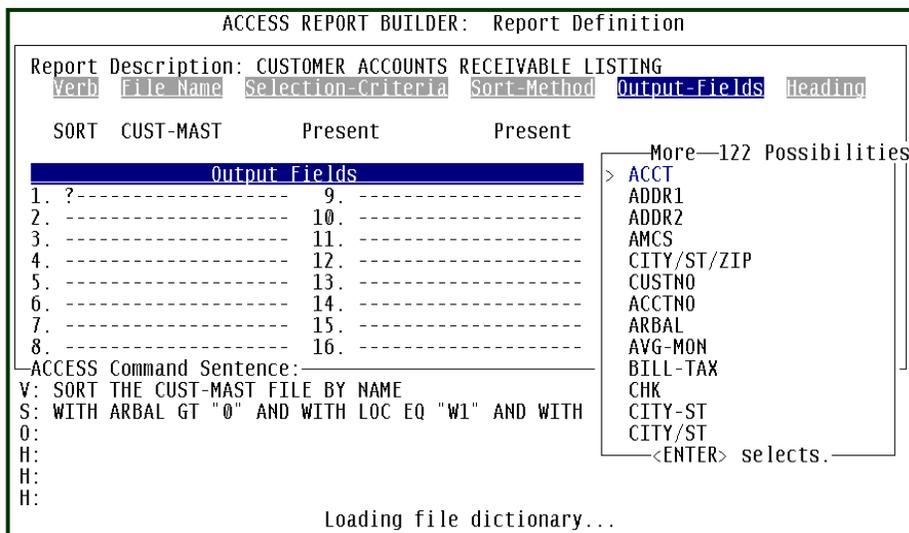


**Building the Report – Enter the Output Fields (cont'd)**

**Field Name Selection Window**

This Field Name selection window will appear when you enter ? at any of the 16 input fields. The Field Names will appear in a selection window with the first field name highlighted. Use the Up-arrow or Down-arrow keys to highlight the Field Name you want to add to the report. When the field Name is highlighted, then press the ENTER/RETURN key. This Field Name will be added to the Output field table into the same field name slot you entered the ?.

Enter the ? at any of the 16 input fields. The Field Name selection window will appear on the right side of the screen. As seen by the example, there are over 120 Customer Master File field names to be selected. Some files will contain more or fewer field names.



Remember, the order you enter the field names is the order they will appear horizontally across the report heading.

**Moving a Field Name**

Should you wish to move a field name from one slot to another, then that field name can be deleted and added to the next open output field slot.

**Invalid Field Names**

When you become familiar with the Field Names available, then using the ? option won't be necessary. But, should you enter a Field Name that is not found in the Data Dictionary of the file, an error message will be displayed at the bottom of the screen. You can then try another valid Field Name or use the ? option to display the available Field Names.



**Building the Report – Enter the Output Fields (cont'd)**

After entering all the Field Names for the sample AR Balance report, the screen below shows these fields. They have been entered in the order they are to appear across the report heading.

**Totaling a Data Field**

Recall the planning done when describing this sample report? The AR Balance field will be summed and the total will print at the end of the report. Using the **TOTAL** modifier in front of the Field Name **ARBAL**, line 6, will command the summation of this data field.

At the bottom of this screen is the ACCESS Command Sentence built so far. As each Field Name was entered (1-6), these Field Names are displayed on the **O:** line shown here.

ACCESS REPORT BUILDER: Report Definition

---

Report Description: CUSTOMER ACCOUNTS RECEIVABLE LISTING

Verb File Name Selection-Criteria Sort-Method Output-Fields Heading

SORT CUST-MAST Present Present

**Output Fields**

1. ACCT	9. -----
2. NAME	10. -----
3. PHONE	11. -----
4. SLSMAN	12. -----
5. CREDIT	13. -----
6. TOTAL ARBAL	14. -----
7. -----	15. -----
8. -----	16. -----

----- Report Width: 79

ACCESS Command Sentence:

V: SORT THE CUST-MAST FILE BY NAME

S: WITH ARBAL GT "0" AND WITH LOC EQ "W1" AND WITH CREDIT GE "250"

O: ACCT NAME PHONE SLSMAN CREDIT TOTAL ARBAL

H:

H:

H:



**FYI:**

When using the TOTAL modifier with a Field Name, remember to use it only with a Field Name that contains numeric data or money data. You cannot total a field containing a date or alphabetic data. If you total a non-numeric field accidentally, then you could begin to lose your teeth prematurely. So be careful.

When entering the Field Names for your report, each field will take up printing space on the report. The more data fields, the wider the report becomes. Your printer is only able to print up to 132 columns of data. Therefore, the Report Width is shown so you know how wide your report format is becoming. Should the report exceed 132 columns, and then unpredictable results will occur.



**Building the Report – Enter the Output Fields (cont'd)**

With all the Field Names entered, then press the RETURN/ENTER key. The screen shown below will appear with the action message at the bottom of the display. At this prompt, enter **Y** if all the fields have been entered correctly. Enter an **N** if you want to make any additions or deletions to the table of 16 Output Fields.

Output Fields	
1. ACCT	9. -----
2. NAME	10. -----
3. PHONE	11. -----
4. SLSMAN	12. -----
5. CREDIT	13. -----
6. TOTAL ARBAL	14. -----
7. -----	15. -----
8. -----	16. -----

ACCESS Command Sentence: \_\_\_\_\_ Report Width: 79  
V: SORT THE CUST-MAST FILE BY NAME  
S: WITH ARBAL GT "0" AND WITH LOC EQ "W1" AND WITH CREDIT GE "250"  
O: ACCT NAME PHONE SLSMAN CREDIT TOTAL ARBAL  
H:  
H:  
H:

Are the Output Fields correct? (Y,N): Y

**Accept Output Fields**

If a **Y** is entered, then the Output Fields table will be removed and the word **Present** will now appear under the Output-Fields segment at the top of the screen.

**Change or Remove and Output Fields**

If an **N** is entered, then the cursor will be placed on Line 1 of the Output Fields. You can enter a new Field Name to replace the current Field Name. Or, enter a **D** to delete and remove the Field Name from the report.

When a field is deleted, then all of the other fields will move one field slot in the Output Fields.

The help message at the bottom of the screen describes your options when the cursor is placed back into the Output Fields.

Output Fields	
1. ACCT	9. -----
2. NAME	10. -----
3. PHONE	11. -----
4. SLSMAN	12. -----
5. CREDIT	13. -----
6. TOTAL ARBAL	14. -----
7. -----	15. -----
8. -----	16. -----

ACCESS Command Sentence: \_\_\_\_\_ Report Width: 79  
V: SORT THE CUST-MAST FILE BY NAME  
S: WITH ARBAL GT "0" AND WITH LOC EQ "W1" AND WITH CREDIT GE "250"  
O: ACCT NAME PHONE SLSMAN CREDIT TOTAL ARBAL  
H:  
H:  
H:

Enter the Field Name, (D)elete to delete a Field Name, or ?

Of course, you can press the RETURN/ENTER key to move to the next field name. Press the RETURN/ENTER key several times TO AN OPEN SLOT TO ADD ANOTHER FIELD Name. There is no checking to insure that a Field Name appears no more than once in the Output Fields. If

## ACCESS Report Builder

you want to be redundant, it's your call.

### **7** Building the Report – Enter the Report Heading

To finish off the report, a nice heading would add the professional polish to impress your boss. There are three optional heading lines that can be entered. Additionally, a page number as well as the date and time can be added to the report heading. Highlight the **Heading** segment and press ENTER. The screen below will appear for the entry of the 3 heading lines. Of course, a report heading is optional.

ACCESS REPORT BUILDER: Report Definition

Report Description: CUSTOMER ACCOUNTS RECEIVABLE LISTING

Verb	File Name	Selection-Criteria	Sort-Method	Output-Fields	Heading
SORT	CUST-MAST	Present	Present	Present	

Print the page number? (Y,N): Y  
Print (D)ate, Date & (T)ime? (D,T): T

Heading Line 1:  
Heading Line 2:  
Heading Line 3:

ACCESS Command Sentence: \_\_\_\_\_ Report Width: 79

V: SORT THE CUST-MAST FILE BY NAME  
S: WITH ARBAL GT "0" AND WITH LOC EQ "W1" AND WITH CREDIT GE "250"  
O: ACCT NAME PHONE SLSMAN CREDIT TOTAL ARBAL  
H:  
H:  
H:

Do you want to print the page number in the report heading?

#### **Page Number in the Heading:**

When the screen above is displayed, the cursor will first stop at the Page Number prompt. The prompt will default to a **Y**. You will have to enter an **N** if no page number is to be printed on the report heading. Otherwise, just press ENTER at this prompt and the default of **Y** will be accepted and a page number will be added to the report heading.

#### **Date and Time in the Heading:**

There are two options here. Adding the Date and Time or just the Date. By entering the **D** or **T** will place the Date or the Date and Time, respectively, in the report heading.

**Note:** Should the width of the report along with the length of the last Heading line entered not have enough room for the Date and Time, then only the Date will be printed. The Date and

## ACCESS Report Builder

Time combination takes up to 22 spaces on the left edge of the last heading line entered.

### **7** Building the Report – Enter the Report Heading (cont'd)

#### Three Heading Lines:

There are 3 optional heading lines that can be entered. Any of the three lines can be used, or all three can be used. Good heading design would place the company or branch name on Line 1, with the name of the report on Line 2. Line 3 can be used to provide more detail of the contents of the report. For example, the screen shown below illustrates this design principle. But, your report builder and the heading you create is up to your creativity.

The heading lines entered will be automatically centered on the report page.

```
ACCESS REPORT BUILDER: Report Definition
Report Description: CUSTOMER ACCOUNTS RECEIVABLE LISTING
Verb  File Name  Selection-Criteria  Sort-Method  Output-Fields  Heading
SORT  CUST-MAST   Present            Present      Present
Print the page number? (Y,N): Y
Print (D)ate, Date & (T)ime? (D,T): T
Heading Line 1: AUTOPOWER TRUCK PARTS & SERVICE
Heading Line 2: CUSTOMER A/R BALANCE LISTING
Heading Line 3: BRANCH-W1 WITH CREDIT LIMITS OVER $250
ACCESS Command Sentence: _____ Report Width: 79
V: SORT THE CUST-MAST FILE BY NAME
S: WITH ARBAL GT "0" AND WITH LOC EQ "W1" AND WITH CREDIT GE "250"
O: ACCT NAME PHONE SLSMAN CREDIT TOTAL ARBAL
H: AUTOPOWER TRUCK PARTS & SERVICE
H: CUSTOMER A/R BALANCE LISTING
H: BRANCH-W1 WITH CREDIT LIMITS OVER $250
Is your Heading correct? (Y,N,E): Y
```

#### Updating the Report Heading:

With the report heading entered, the prompt at the bottom of the screen permits updating the heading with the entry of a **Y**. Or by entering an **N**, you can make changes.

If the **N** is entered, then the cursor will prompt through the heading entries all over again starting with the Page Number. At each prompt, if no changes are to be made, just press the ENTER key to skip that field. When finished with all the report heading prompts, the **Heading Correct?** message will be presented again.

## ACCESS Report Builder

---

### Report is Ready to Run

If your screen looks like the one below, congratulations! You have built your first customer report. If not, you may have to stay after class.

The ACCESS Command Sentence defines exactly what the computer will do. As this is a simple report, you can go back and modify this report by adding additional Field Names or change the Sort Method. This is when the real fun begins. Taking an existing report and changing it slightly creating a new report with a different view of you data.

ACCESS REPORT BUILDER: Report Definition						
Report Description: CUSTOMER ACCOUNTS RECEIVABLE LISTING						
<u>Verb</u>	<u>File Name</u>	<u>Selection-Criteria</u>	<u>Sort-Method</u>	<u>Output-Fields</u>	<u>Heading</u>	
SORT	CUST-MAST	Present	Present	Present	Present	

ACCESS Command Sentence: \_\_\_\_\_ Report Width: 79

V: SORT THE CUST-MAST FILE BY NAME  
S: WITH ARBAL GT "0" AND WITH LOC EQ "W1" AND WITH CREDIT GE "250"  
O: ACCT NAME PHONE SLSMAN CREDIT TOTAL ARBAL  
H: AUTOPOWER TRUCK PARTS & SERVICE  
H: CUSTOMER A/R BALANCE LISTING  
H: BRANCH-W1 WITH CREDIT LIMITS OVER \$250

Highlight a section of the ACCESS command, press RETURN, or ESCape

After the heading was entered, the word **Present** is placed under the Heading segment, just as can be seen for the other segments used in building this report.

You can return to any of the other report segments using the Left or Right-arrow keys. Highlight a specific segment, press ENTER to change your entries.

# ACCESS Report Builder

## Updating the Report:

At the bottom of the screen on the previous page, a help message shows the option entry **ESCAPE**. Press the **ESC** key to update the report to the Report Library file. When the ESC key is pressed, the following screen displays.

**Enter a SAVE-LIST at run time?:** If you answer **Y**, when you run the report, you will be asked for a Save-List name. This means the report will only look at the data in that Save-List.

**Suppress report detail (sub-totals only)?:** This option allows you to print summary information instead of detail if desired.

**Double space the Report?:** Answer **Y** if you want to double space the report.

```
ACCESS REPORT BUILDER: Report Definition
Report Description: CUSTOMER ACCOUNTS RECEIVABLE LISTING
Verb  File Name  Selection-Criteria  Sort-Method  Output-Fields  Heading
SORT  CUST-MAST   Present            Present      Present        Present

Options
Enter a SAVE-LIST at run time? (Y,N).....: N
Suppress report detail (sub-totals only)? (Y,N): N
Double space the report? (Y,N).....: N

ACCESS Command Sentence:-----Report Width: 79
V: SORT THE CUST-MAST FILE BY NAME
S: WITH ARBAL GT "0" AND WITH LOC EQ "W1" AND WITH CREDIT GE "250"
O: ACCT NAME PHONE SLSMAN CREDIT TOTAL ARBAL
H: AUTOPOWER TRUCK PARTS & SERVICE
H: CUSTOMER A/R BALANCE LISTING
H: BRANCH-W1 WITH CREDIT LIMITS OVER $250
```

## ACCESS Report Builder

---

Once you have answered the questions in the "Options Box", the following prompt will display:

Do you wish to update this report definition? (Y,N): Y

If you enter a **Y**, the report will be updated to the Reports Menu and the Report Description is added to the "Open" slot first seen when we started out.

If you enter **N**, then all the work you have entered will be erased and you will need to start over.

If a **Y** was entered at the Update prompt, then the Report Description you entered will now appear on the Reports Menu, report slot #1.

ACCESS REPORT BUILDER: Reports Menu

1. CUSTOMER ACCOUNTS RECEIVABLE LISTING	CUSTOMER REPORTS
2. Open	
3. Open	
4. Open	
5. Open	Unassigned Menu
6. Open	
7. Open	
8. Open	Unassigned Menu
9. Open	
10. Open	
11. Open	Unassigned Menu
12. Open	
13. Open	
14. Open	Unassigned Menu
15. Open	
16. Open	
17. Open	Options
18. Open	
19. Open	
20. Open	

Enter Selection Number:

# ACCESS Report Builder

## Run a Report

Now that the report has been created, let's run it. From the Reports Menu, select the report to be run. In this case, enter the report number 1 and press ENTER.

```
ACCESS REPORT BUILDER: Reports Menu
1. CUSTOMER ACCOUNTS RECEIVABLE LISTING
2. Open
3. Open
4. Open
5. Open
6. Open
7. Open
8. Open
9. Open
10. Open
11. Open
12. Open
13. Open
14. Open
15. Open
16. Open
17. Open
18. Open
19. Open
20. Open

CUSTOMER REPORTS
Unassigned Menu
Unassigned Menu
Unassigned Menu
Unassigned Menu
Options

Enter Selection Number:
```

Selecting the report from the Reports Menu will display a window with 2 options. The 1<sup>st</sup> Option will run the report, the 2<sup>nd</sup> Option will allow you to change or modify the report. To run the report, select Option #1.

```
1. Run this report
2. Modify the report definitions

Select 1 or 2: 1
```

Once you have selected Option #1, the following Options Window will display.

Enter **D** to Display the report to the screen. If you select Display, the cursor will skip the next to prompts.

```
1. Run this report
2. Report Options
S (D)isplay, (E)xpert File, or (P)rint: P
Pool Options: (H,HS):
Number of Copies: 1
```

## ACCESS Report Builder

Enter **P** to Print the report to a printer. If you select Print, you need to answer the next two prompts. These are discussed in the next section.

### Print the Report

Should you wish to print the report, then Spooler and Number of Copies options will be prompted.

### Spooler Option:

There are 2 spooler codes that can be entered at this prompt. There are no option codes set up as a default at the this prompt. The possible codes you may enter are described below:

H	Generate the report, print it on the designated printer, but save a copy of the report in the Spooler. Having the report saved in the Spooler enables the report to reprinted without having to report recomputed again. This Spooler Option is convenient if the report takes a long time to compute and there may be a possiblity of additional copies printed. When the <b>H</b> Option is used, an Entry Number will be shown on the screen. The Entry Number represents the Print Job Number to be referenced in the Spooler when this report is to be reprinted or deleted.
HS	This option is the same as the <b>H</b> Option above except; this option will not print the report. The <b>S</b> designates "print suppress"

### Number of Copies Option:

You can print more than one copy of the report. The prompt is defaulted with 1 copy. Overtyping the 1 with any number up to 10. The number of copies you enter will be printed on the printer that will be selected from the Printer Device selection window to appear next.

### Printer Selection:

Since there may be more than one printer on your system, a Printer selection window will display the spooler printers available. Printer zero will be defaulted. Overtyping the zero with any printer number shown under the **PTR#** Column.

1. Run this report  
2. Report Options  
(D)isplay, (E)xport File, or (P)ri

Printer	Ptr#	Loc	Type	Port
System Printer	0	W1	PARALLEL	0
NAME	2	W1	SHARED	57
NAME	3	W1	SHARED	58
NAME	4	W1	SHARED	59

Enter Printer#: SA

Finally, The Report.....

AUTOPOWER TRUCK PARTS & SERVICE						
CUSTOMER A/R BALANCE LISTING						
23 MAY 2002	BRANCH-W1 WITH CREDIT LIMITS OVER \$250				Page: 1	
ACCT-NO	CUSTOMER NAME	PHONE	SLSMAN	CREDIT LIMIT	A/R-BALANCE	
4163	A & A TRANSPORT	209-826-4311	TG	5,000	743.34	
1059	A BIG DAIRY FARM	407-956-8956	101	10,000	327.46	
38	ACME TRUCK PARTS	800-545-2263	101	5,000	330.36	
1051	B & B TRUCK PARTS	909-877-2040	101	1,000	1,098.07	
1796	BAGGIE FARMS EXPRESS, INC.	813-598-7889	601	10,000	4,516.40	
222	BAYSHORE TRUCK EQUIPMENT CO.	800-654-6884	101	5,000	2,104.60	
4553	BILL HEARD CHEVROLET	407-323-8859	301	5,000	1,875.69	
2193	BOB SMITH	407-555-7628	101	50,000	4,825.00	
4184	BUTTE COUNTY FIRE DEPT.	916-538-7827	SHOP	101	2,000	6.68
500	CATTUZZO & SONS	864-9405	101	1,000	147.37	
5091	CENTRAL VALLEY TRUCKING	209-722-8183	401	2,500	668.54	
4220	CROOKSHANKS READY-MIX	209-992-5077	TG	2,500	879.84	
1307	DALMATIAN TRUCK CENTER & REPAI	321-854-7845	501	1,000	1,247.40	
5102	DYSTRA FAMILY DAIRY	209-498-3951	601	20,000	4.49	

ACCESS Report Builder

AUTOPOWER TRUCK PARTS & SERVICE					
CUSTOMER A/R BALANCE LISTING					
23 MAY 2002	BRANCH-W1 WITH CREDIT LIMITS OVER \$250				Page: 2
ACCT-NO	CUSTOMER NAME	PHONE	SLSMAN	CREDIT LIMIT	A/R-BALANCE
1998	FLORIDA PARKS	904-569-9985	301	10,000	46.32
2071	FLOWERS 'R' US	407-359-6598	101	6,000	203.50
5242	H.F.S. ENTERPRISES,INC	661-833-6339	201	2,500	1.65
5239	HAMILTON MOBIL MILLING	209-683-2672	101	1,500	7.26
800	JERRY MALONE PRODUCTIONS INC	209-651-0430	201	2,000	169.83
4500	JIM'S LAWN & GARDEN SERVICE	407-699-5521	501	6,000	814.65
4558-1	LAKE MARY GMC TRUCKS	407-996-7845	301	35,500	600.70
1005	LAKE MARY TOWING COMPANY	407-695-4885	601	10,000	784.10
1535	M. CURTI & SON	688-8323	101	5,000	283.52
1206	MADERA DISPOSAL SYSTEMS INC	559-665-3099	101	3,500	473.36
2192	NORRIS MOTORSPORTS	407-555-9898	100	8,000	10,876.04
1585	OKAMURA TRUCKING	896-3873	201	500	732.72
2173	ORANGE COUNTY TRANSIT AUTH	F3	201	20,000	1,929.83
4144	OVIDEO TRUCK CENTRE	407-365-2215	401	6,000	3,235.01

AUTOPOWER TRUCK PARTS & SERVICE					
CUSTOMER A/R BALANCE LISTING					
23 MAY 2002	BRANCH-W1 WITH CREDIT LIMITS OVER \$250				Page: 3
ACCT-NO	CUSTOMER NAME	PHONE	SLSMAN	CREDIT LIMIT	A/R-BALANCE
1605	PORTERVILLE CONCRETE PIPE, INC	559-784-6187	101	500,000	7.50
1656	SPECIALTY TRUCK PARTS	408-998-7272	101	10,000	117.00
605	STOREHOUSE STORES	407-699-8874	201	10,000	4,174.53
2890	THE MATRIX	407-265-8885	101	15,500	8.14
2172	TRI-COUNTY TRANSIT SYSTEM	407-284-1234	701	100,000	428.23
250	W.E. PIPKIN TRUCKING , INC	209-855-2554	101	500	715.61
1854	ZIGGY FARMS	352-884-9856	201	500,000	20,579.20
937	ZIGGY TRUCKING	407-956-7748	201	6,000	2,941.04
					67,904.98

Press any key...

# ACCESS Report Builder

## Modifying an Existing ACCESS Report Definition

Even though a lot of time can be spent getting the report to print exactly as you wish, there will be occasions that require a report to be modified. Changing the definitions of the report is simple. By selecting the specific report to be changed, the Report Builder will open a screen and display the definitions of that report. The screen below starts out at the report selection step. As seen in the example below, within the first menu, Customer Reports, there are three reports that have been created. Of these three, the first report was selected for modification.

When the report was entered, 1 in this case, a **Run/Modify** window appears. From this window, enter option number 2. This option will fetch the report definitions of the selected report and present the screen shown at the bottom of this page.

The image shows two screenshots from the ACCESS REPORT BUILDER. The top screenshot is titled "ACCESS REPORT BUILDER: Reports Menu" and displays a list of reports. The first report, "1. CUSTOMER ACCOUNTS RECEIVABLE LISTING", is highlighted. To the right of the list is a menu structure with "CUSTOMER REPORTS" at the top, followed by several "Unassigned Menu" items, and "Options" at the bottom. A green arrow points from the "2. Modify the report definitions" option in the list to the "Report Definition" screen below. The bottom screenshot is titled "ACCESS REPORT BUILDER: Report Definition" and shows the details for the selected report. It includes a table with columns for Verb, File Name, Selection-Criteria, Sort-Method, Output-Fields, and Heading. Below the table, it shows the last run date and last modification date. At the bottom, it displays the ACCESS Command Sentence and a note to change the report name.

1. CUSTOMER ACCOUNTS RECEIVABLE LISTING  
2. CUSTOMER SALESMAN REPORT  
3. CUSTOMER SALES HISTORY REPORT  
4. Open  
5. Open  
6. Open  
7. Open  
8. Open  
9. Open  
10. Open  
11. Open  
12. Open  
13. Open  
14. Open  
15. Open  
16. Open  
17. Open  
18. Open  
19. Open  
20. Open

1. Run this report  
2. Modify the report definitions  
Select 1 or 2: 2

CUSTOMER REPORTS  
Unassigned Menu  
Unassigned Menu  
Unassigned Menu  
Unassigned Menu  
Unassigned Menu  
Options

Selection 2 of the Run/Modify window will open up the Report Definition screen shown here.

ACCESS REPORT BUILDER: Report Definition

Report Description: CUSTOMER ACCOUNTS RECEIVABLE LISTING...]  
Verb File Name Selection-Criteria Sort-Method Output-Fields Heading  
SORT CUST-MAST Present Present Present Present

Last run date: 17:45:52 23 MAY 2002  
Last mod date: 13:35:02 23 MAY 2002

ACCESS Command Sentence: \_\_\_\_\_ Report Width: 79  
V: SORT THE CUST-MAST FILE BY NAME  
S: WITH ARBAL GT "0" AND WITH LOC EQ "W1" AND WITH CREDIT GE "250"  
O: ACCT NAME PHONE SLSMAN CREDIT TOTAL ARBAL  
H: AUTOPOWER TRUCK PARTS & SERVICE  
H: CUSTOMER A/R BALANCE LISTING  
H: BRANCH-W1 WITH CREDIT LIMITS OVER \$250  
Change the report name that will appear on the Reports Menu.

Notice the last run date and last mod date.

The bottom 1/3 of the screen is the ACCESS Command.

**My ARBy Notes for Building Customer Reports.....**