CREATING A USER-DEFINED REPORT USING CREATE-A-REPORT

This month's newsletter concludes the series on the Create-A-Report module by discussing how to create your own report.

First, you will need to do the extract step to collect and sort the data you want on the report.

Then, go to

Create-a-Report
 Print user-defined report

On the first screen, you enter the name of your extract file as well as some general information about the report such as the title.
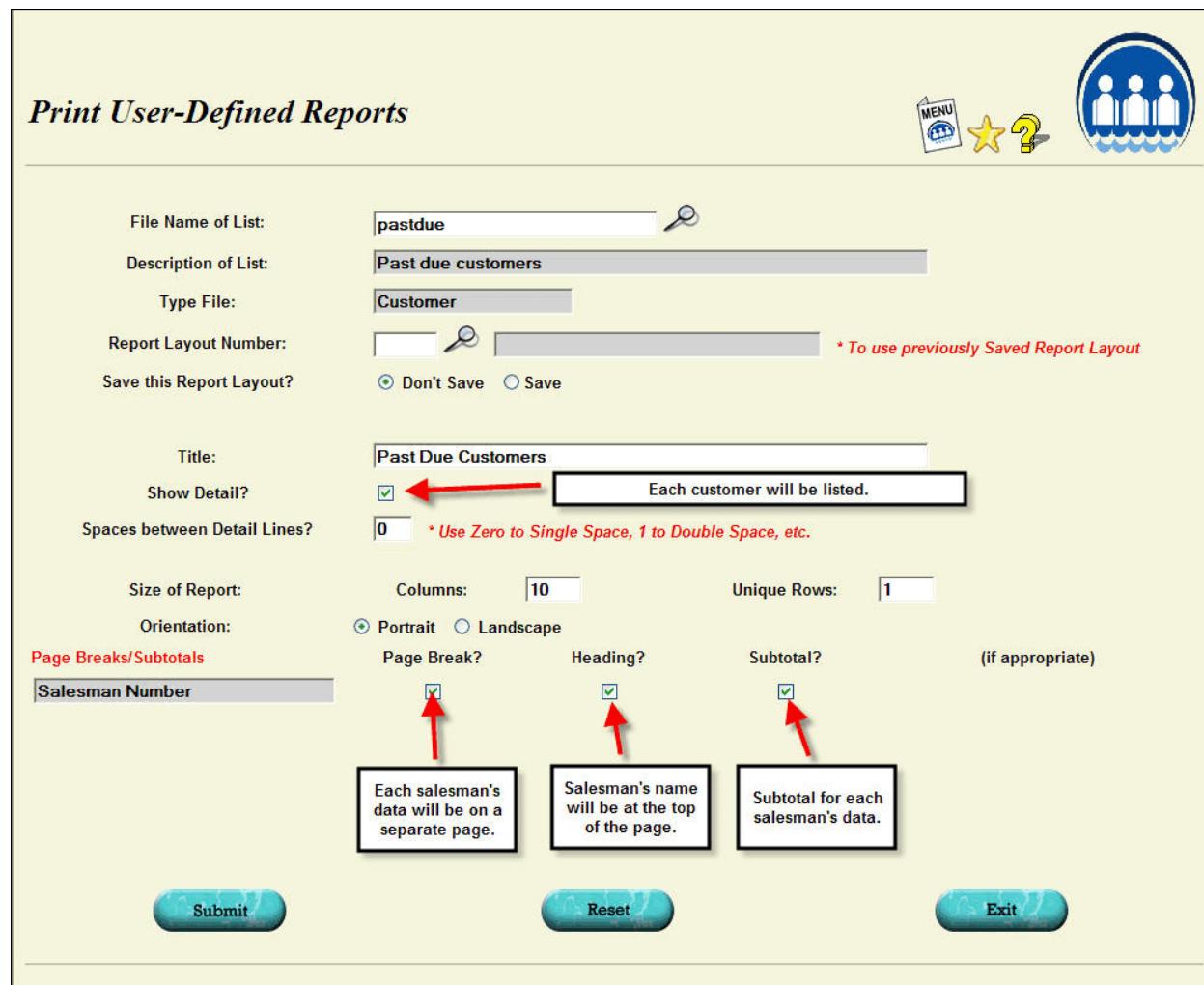
The **file name of extracted data** is the same file name you used in the extract step.

If you will be generating this report repeatedly, you can save the **report layout** and call it back up. This keeps you from having to specify the report each time. The data to be included on the report as well as the other general information entered on this screen will be filled out for you.

On some reports, you may only need to see the totals and not the individual detail making up the totals. For example, on this report, if you only wanted to see the totals for each salesman, you could uncheck the **"Show detail?"** and only the totals for each salesman would be included. Check it and you will see each customer listed that make up the total.

In order to know how big to make the table on the second screen, you will need to enter the **number of columns of data to be exported**. Be generous in entering this number. If you enter 10 and then find you need 12 columns, you will have to exit and start over because you can't enlarge the table once you are on the second screen. It is OK to have more columns than you need so it is better to request a few more columns than you think you will need.

Most reports will have only one line per customer, order, etc. but you may specify a multi-line report if you wish. Enter the **number of lines or rows** you will need. Samples of multi-line reports are included in the Online Manual under the Help function on your main menu.

If you have sorted your data (our example was sorted by salesman), you have the option of getting subtotals and page breaks.

If you are including some type of numeric data like "amount due", you will probably want subtotals. If you want the different parts of the sort separated, you will also want headings. If you just sorted so the data would fall in a certain order, you can skip the headings and subtotals.

Once you submit your initial request, you will see a screen where you can specify the columns you want included on the export. A screen shot of a completed screen is shown below.

Data fields are selected by clicking on the look up icon to find the one you want to use just like you used in the extract or export step. Or, if you know the field number, you can just type it in.

A default heading is shown but you can adjust this if you would like the heading to say something else.

A sample of the size and the way the data will be formatted is shown. If you want to change this, you can click on the "more detail" magnifying glass. Another screen will be displayed where you can adjust the type of formatting you want to use, control the number of digits to include in the column, or to specify a literal.

Column 1	Column 2	Column 3	Column 4
Customer Number	Customer Name	Current	Past Ba
123456	XXXXXXXXXXXXXXXXXXXXXXX	123,456.78-	123,4
0650	0649	0114	4608

isplay/Print   Print Plus   Reset   Exit

You can click on Display/Print to generate the report as a PDF.   If you want to e-mail or FAX it, click on the Print Plus button instead.