Stamina Software Pty Ltd

TRAINING MANUAL

Viságe Reporter

Version: 2 21st January 2009

Contents

Introduction

Once you have mastered the art of generating screens, and getting the information into your database, it is now time to look at, How to get the information out of the database? This is typically going to be in the generation of a Report that can be printed, emailed, faxed or sent out as a file.

Assumed Knowledge

It is assumed that you have the knowledge on how to use the Viságe Search facilities.

Pre Planning

Before you create you report, take a few minutes to consider the layout/ design of your report.

What details do you want to print and where? Will the report print on one page, or will it overflow to more than one page?

Do you have similar data that will appear in the Report Heading for example so that setting up a Report Template will hasten the creation of many reports?

What do you want to print at the start of the Report – eg. Column Headings, Report Names?

What do you want to print on each page of the Report? eg. Same/Different Column Headings, Report Title.

Do you want something different to print on the first page and subsequent pages, if the report goes to more than one page?

What do you want printed at the bottom of each page and also at the end of the report for a one page report and also for a multi page report?

What details do you want printed in the ‘body’ or detailed section of the report?

How do you want your report sorted?

Do you want the report grouped and if so how?

If these decisions are made before the report is set up in Report Designer, the Report Design will be much simpler and will result in your report being created much more quickly and efficiently.

Report Designer Location

Navigate to the Reports Menu by selecting Design > Reports > Reports.

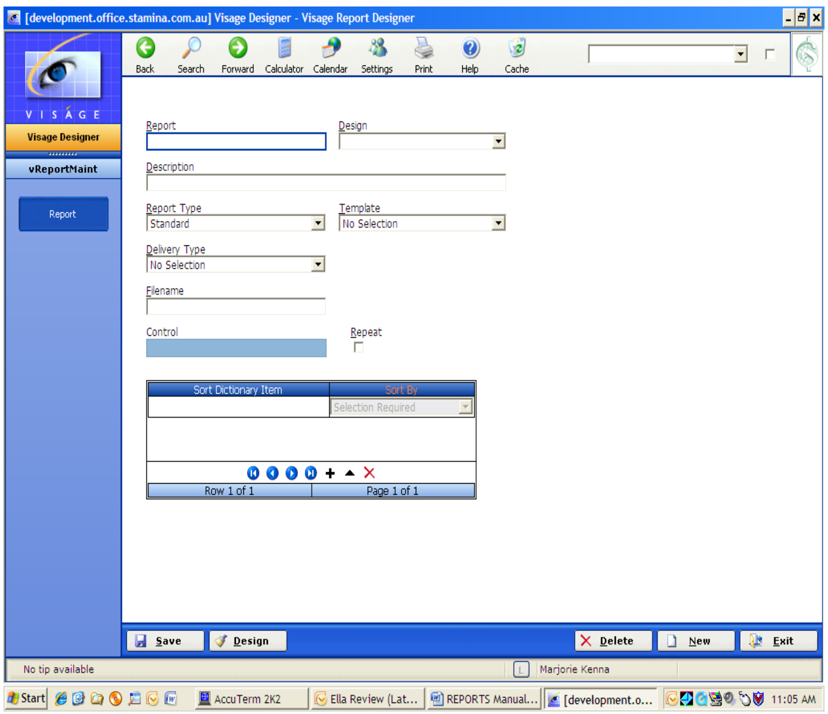


Figure 1: Report Designer Screen

Report Designer Screen Layout

This is the initial screen you will be presented with when you navigate to the Reports Menu in Viságe is

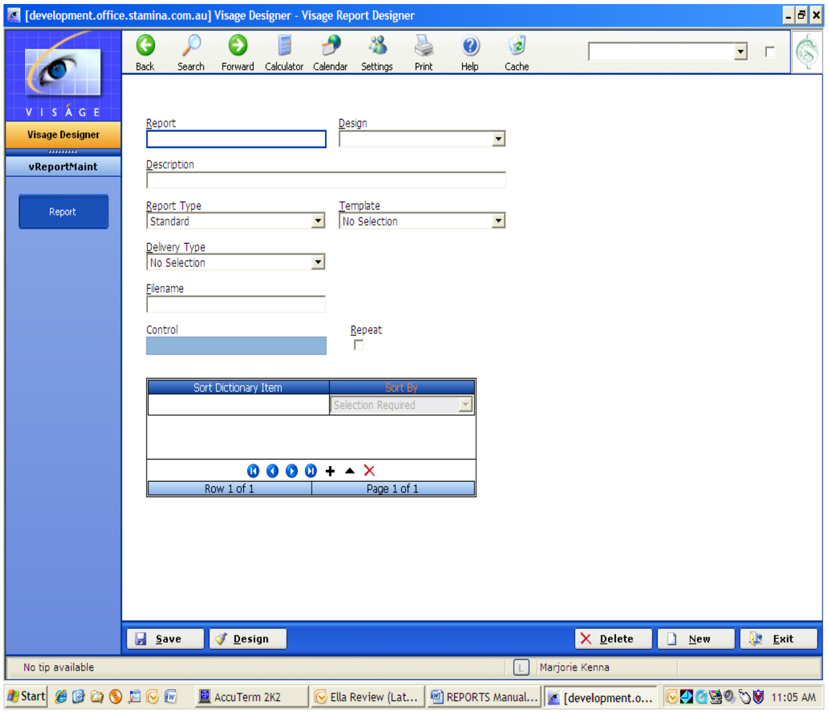


Figure 2: Screen 1 of Viságe Reporter

From Screen 1 of Viságe Reporter you can create a new Report or Review an existing Report.

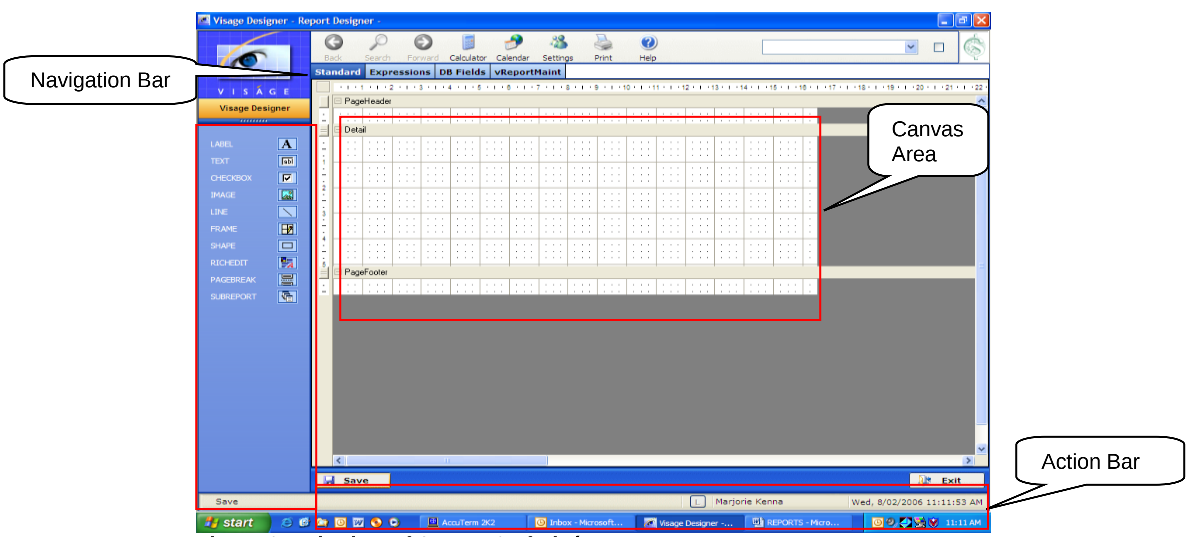


Figure 3: Tab View of Screen 2 of Viságe Reporter

Screen 2 of the Report Designer Screen is broken up into three main areas.

- Navigation Bar

- Canvas area in the middle
- Action Bar at the bottom

The Navigation Bar position and style is set in the User Maintenance for each user. It can be positioned left or right of screen and can be either Tab or Bars.

Bands

The Canvas area of the Report Designer screen is laid out in Bands eg. Page Header, Detail and Page Footer by default. You can add additional bands of: Group Header, Group Footer, Report Header and Report Footer if required.

Expand and Collapse Band Details

You will notice a + or - symbol to the left of each Band name.

If you left click on the – symbol to the left of the Band name, the details of that band will be hidden.

If you left click on the + symbol to the left of the Band name, the details will be visible.

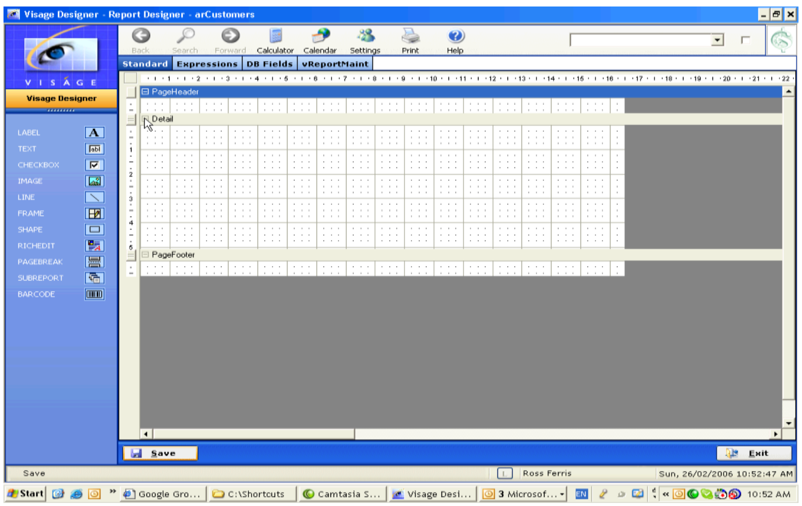


Figure 4: Detail Band visible

Click on the – symbol to the left of the Detail Band

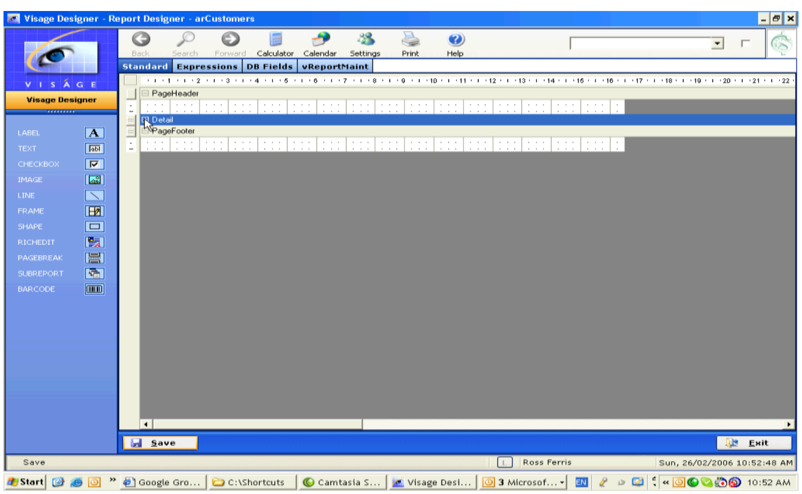


Figure 5: Detail Band hidden

Adjusting Band Height

As you position the fields/elements onto the canvas section of the Report Design Screen, you may find that there is not enough space or perhaps there is too much space in the relevant band.

You can increase or decrease the width of any band on the canvas section of the Reporter Screen to accommodate more or less fields/elements by:

Steps:

1. Position the cursor to the bottom of the band until the mouse changes from the arrow  to a 

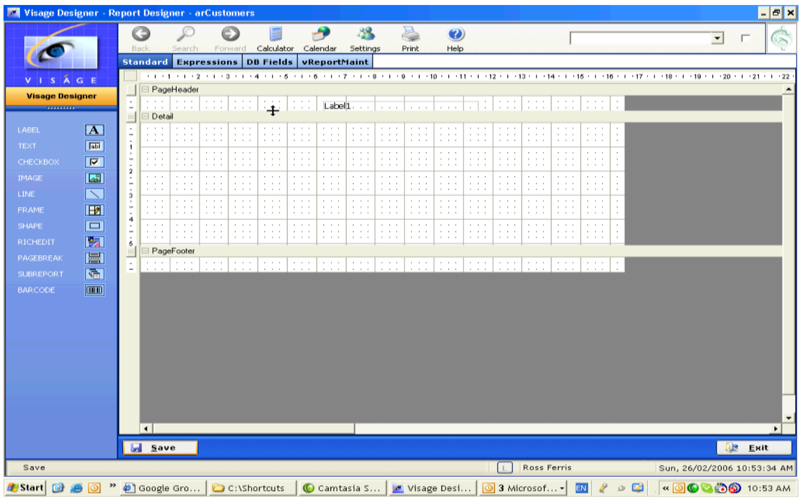


Figure 6: Increase Page Header Band width

2. Left click and drag the band bar to required location, upwards or downwards, depending on whether you are increasing or decreasing the band width. Release mouse when bar is in desired location.

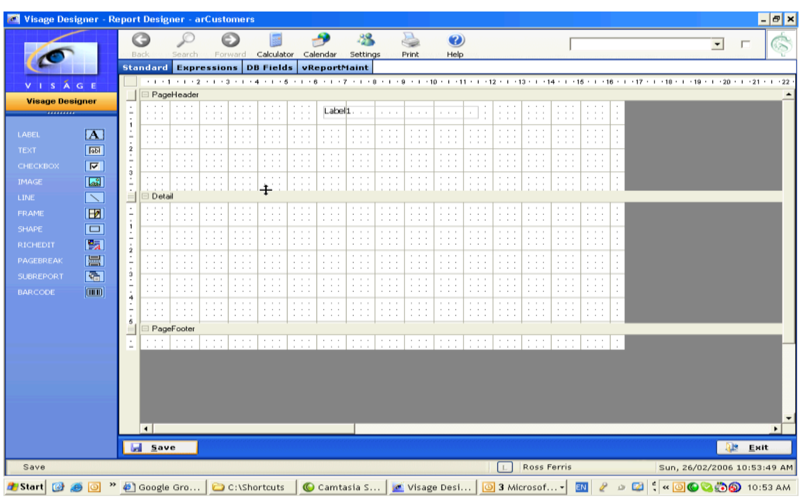


Figure 7: Page Header Band width Increased

Adding Additional Bands

When creating a Report, by default you will be presented with a number of Report Bands eg. Page Header, Detail and Page Footer.

To add additional Report Bands if required:

Steps:

1. After you have set the details on Screen 1, navigate to screen 2 of Report Designer.
2. With your mouse pointer over the Canvas section, right click your mouse

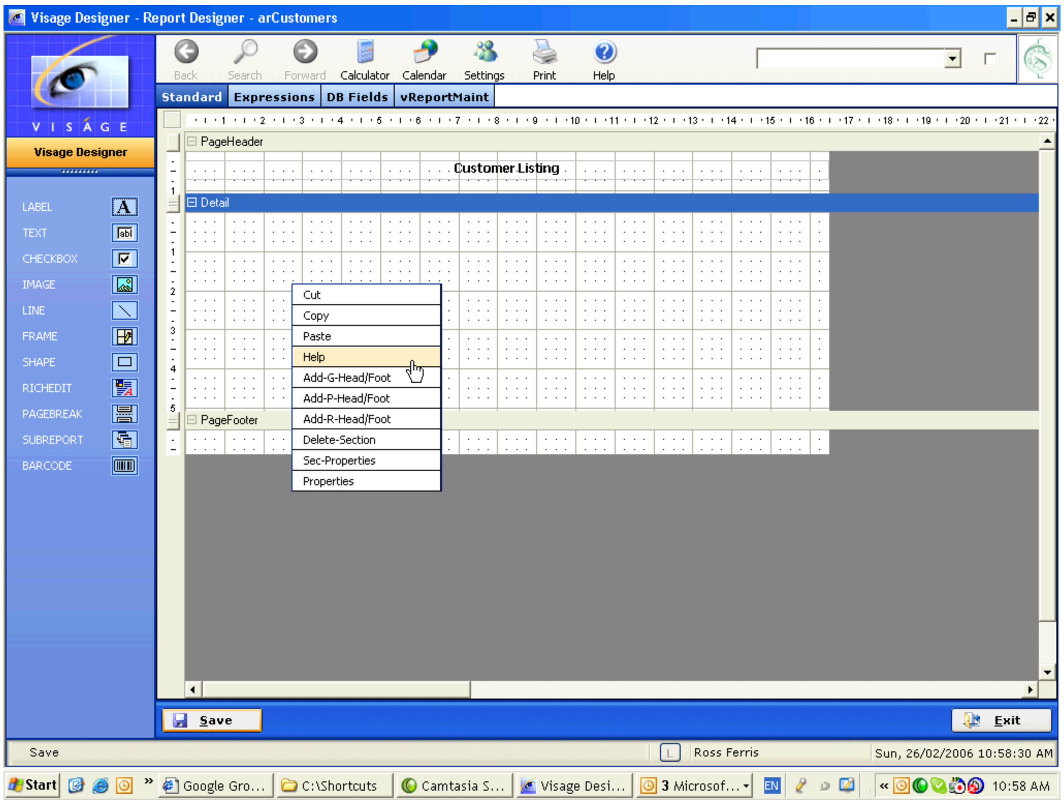


Figure 8: Add Additional Bands to existing canvas

You will then see a context menu with options to allow you to:

- Add G-Head/Foot (Add Group Header/Footer)
- Add P-Head/Foot (Add Page Header/Footer)
- Add R-Head/Foot (Add Report Header/Footer)
- Delete-Section

3. Left click required option and that selection will be added to your report.

Report Designer – Context Menu

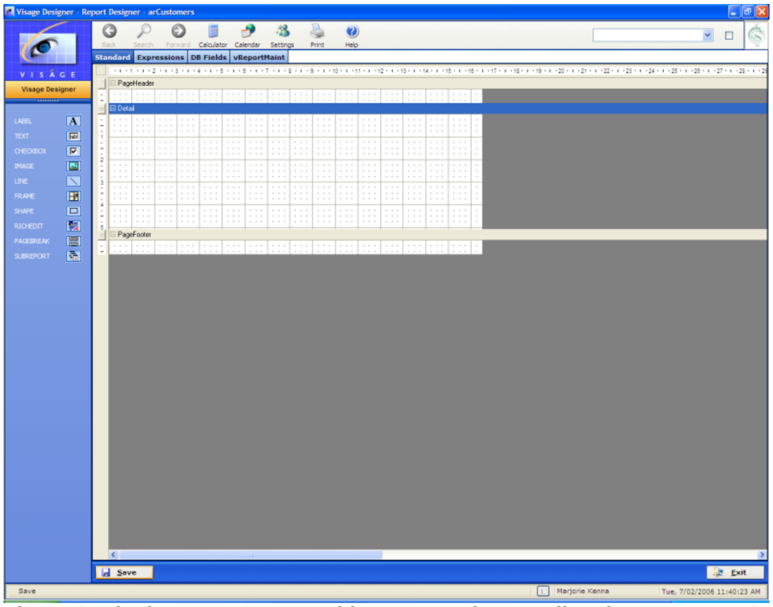


Figure 9: Blank Report Canvas with Page Header, Detail and Page Footer Sections

Position the mouse anywhere in the blank Report Designer screen. Right click with the mouse. You will then have options to:

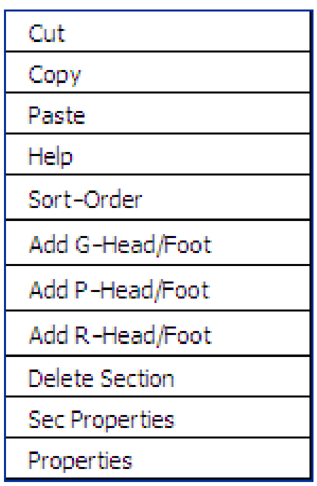


Figure 10: Report Context Menu Options

- **Cut** Cut highlighted selection from the window.
- **Copy** Copy highlighted selection
- **Paste** Paste any previously copied selection.
- **Help** Load up Viságe Help
- **Sort-Order** Allows you to view and if necessary change the sort order for this Report.
- **Add G-Head/Foot** Add a Group Header and Footer Section
- **Add P-Head/Foot** Add a Page Header and Footer Section (cannot add a Page Header/Footer to a sub Report)

- **Add R-Head/Foot** Add a Report Header and Footer Section
- **Delete-Section** Delete the section the cursor is currently located in
- **Sec-Properties** Display the properties of the current section
- **Properties** Display the properties of the Report.

Report Design Property Editor

Report Designer – General Property Editor

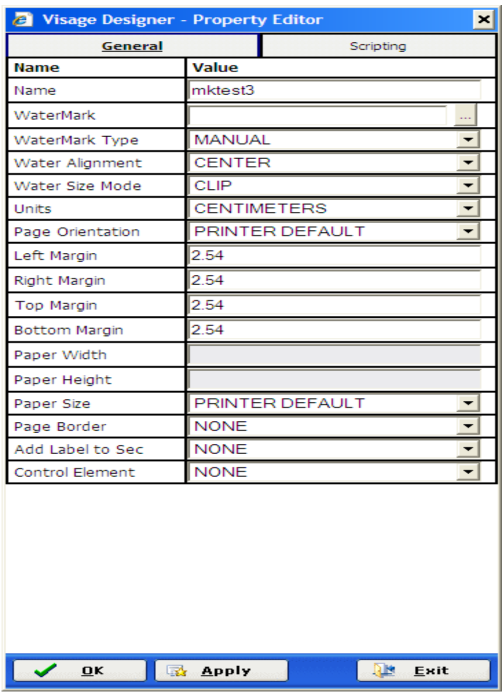


Figure 11: General Tab of the Report Design Property Editor

If required you can adjust any of the following:

Name: Set the field name to your requirements or leave as default.

Watermark: Click on the … button. Select the required icon/Glyph Image

Watermark Type: Select Manual or From Entity. From Entity will use existing Icon/Glyph previously set up in Entity Maintenance. Manual will use the image selected from the Watermark option.

Watermark Alignment: Select required alignment for a watermark. Top Left, Top Right, Center, Bottom right or Bottom left.

Watermark Size: Select required option, Clip, Stretch or Zoom.

If you do not require a watermark in your report, leave the Watermark options blank.

Units: Select Centimeters or Inches for page measurements.
Page Orientation: Select Printer Default, Landscape or Portrait as the page Orientation for the report.

Left Margin: Leave margins as already set or set margin as required.
Right Margin: Leave margins as already set or set margin as required.
Top Margin: Leave margins as already set or set margin as required.
Bottom Margin: Leave margins as already set or set margin as required.

Paper Width: Use this option instead of setting individual margins or if you have a custom paper size.
Paper Height: Use this option instead of setting individual margins or if you have a customer paper size.

Paper Size: Select Printer Default, A4 or Custom.
Page Border: Select from drop down list if you require a Page Border.
Set to NONE if no border is required.

Add label to Sec: Select location where you want the labels of the DB Fields element to be added to your report.

Control Element: This is set to NONE by default. Make your selection from the drop down list.

Report Designer – Scripting Property Editor

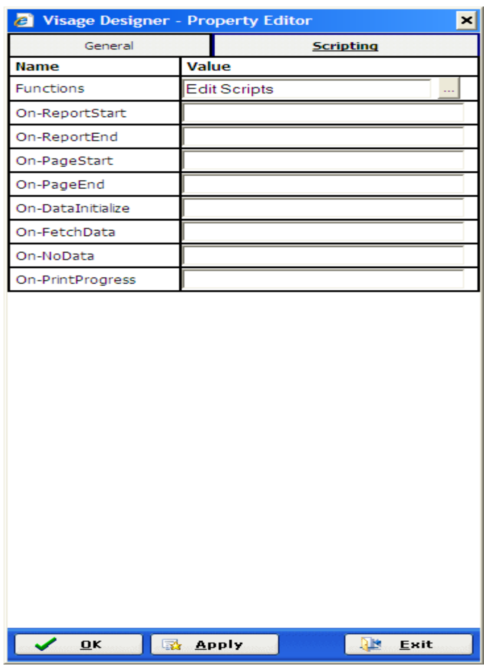


Figure 12: Scripting Tab of the Report Design Property

Before you start adding Standard, Expressions or DB Fields to your report, you should decide if you want to add labels for elements from these categories to your report. If you add a DB field to your report, by default, this is only adding the information to your report: It is not including the field label.

If you do not set the Add label to Sec property option, when you drag DB Fields onto your report, the label will not appear, only the data for that field will display. You can of course, manually add in the label.

To manually add in a label you need to drag either the Text or Label element from the Standard Options onto your report and set up the Label Text Name.

Add label to section

Add labels to sections:
Steps:

1. Position the cursor anywhere in the report designer window.
2. Right click with the mouse. Select Properties. You will then see the following attributes for the Report.

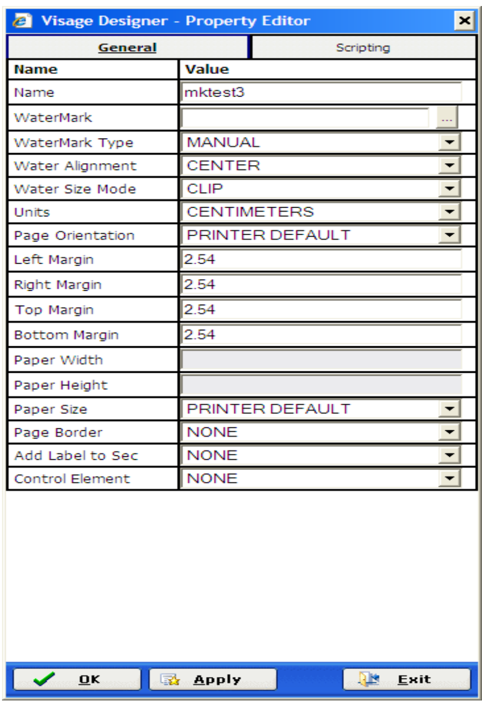


Figure 13: Report Properties to set Add Label to Sec

Select the Add Label to Sec option, and choose where you want the labels to appear. Click ok after your selection has been made.

You have options of:

- Report Header – Labels will appear in the Report Header section
- Page Header – Labels will appear in the Page Header Section
- Detail Header – Labels will appear in the Group Header Section

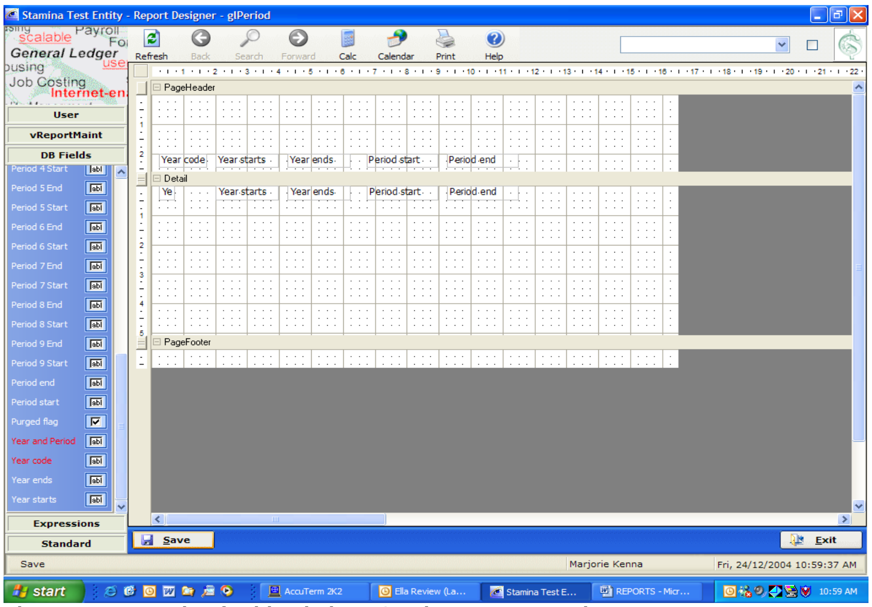


Figure 14: Example of Add Labels to Section – Page Header.

When fields were added to this report, the label is also added to the Page Header Section.

You can change the location where you set up the labels to appear by changing this Add to Sec option:

- If you require some labels to appear in Page Header section for example, you would set the Add Label to Sec to Page Header, drag the elements onto the report – labels will appear in Page Header section.

- Change the Add Label to Sec option, drag remaining fields onto report. Labels will then appear in currently selected Add Label to Sec option.

Page Margins / Orientation

If your report is missing information at the top and/or at the bottom of your report, you will need to set margins for the report.

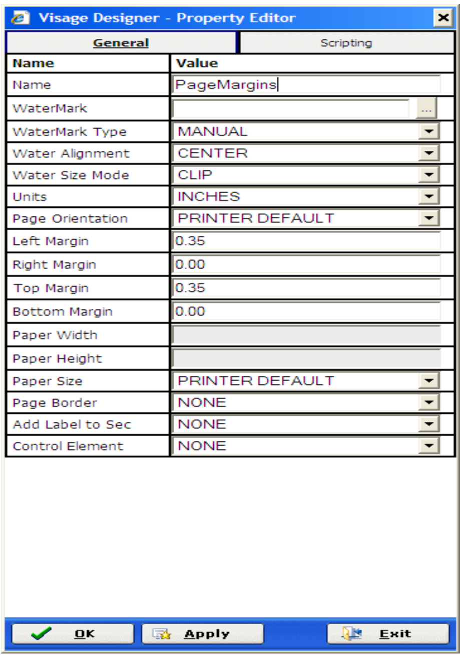


Figure 15: Set Page Margins for your report.

Open your report through Report Designer. With the cursor anywhere in the window, right click with the mouse, and then select the Report Properties option. You will then see the attributes for the report. Set the margins to suit your printer and printing requirements.

You can also set the page orientation in this section. If you want your report to print in Landscape, Printer default or Portrait select the appropriate option under the Page Orientation section of the Properties of the report.

You should then set the margins for Right, Left, Top and Bottom according to where you want the information to be printed on your report. An example of margins for an A4 report – might be Left 0.83, Right 0.14, Top 0.35 and Bottom 0.35. When you create a report, the default margins that are set are 1 inch.

You cannot have a sub report set to portrait or vice versa and a main report set to landscape or vice versa and have both reports print out in different orientation. The report will print out to the page orientation that is set for the 'main' report. The page orientation for the sub report is 'lost' and does not work when combined with a main report that is set to a different page orientation.

Report Header

Details contained in the Report Header will print at the beginning of the report only ie. On the first page of the Report. They will not print on any other pages in your report.

Add a Report Header

Steps:

1. Position the cursor on the second screen of Report Designer in any area that is blank
2. Right click with the mouse.

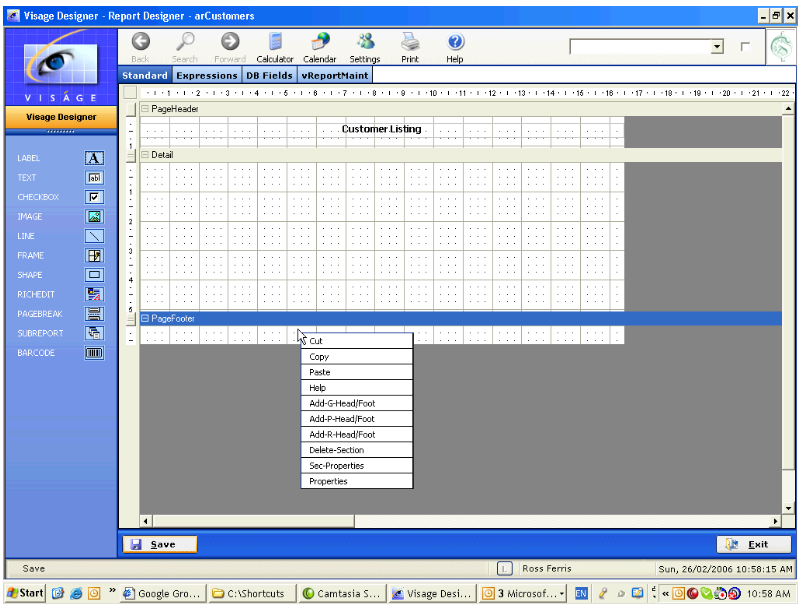


Figure 16: Add additional bands to your Report

You will then see a context menu with options to allow you to:

- Add G-Head/Foot – Add Group Header/Footer
- Add P-Head/Foot – Add Page Header/Footer
- Add R-Head/Foot – Add Report Header/Footer
- Delete-Section – Delete current section

Left click required option and that option will be added or deleted from your report.

Report Header Properties

To view the Report Header Properties

Steps:

1. Position the cursor in the Report Header section.
2. Right click with the mouse.
3. Select Sec-Properties to display the following options

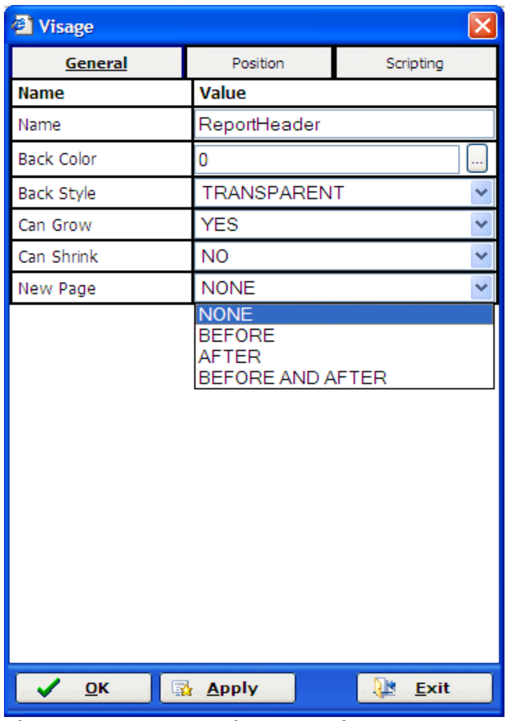


Figure 17: Report Header Properties

General

- **Name:** A unique identifier for the element. The name property is used by the system to reference individual elements. For non-database types it is recommended that the user set a meaningful name. eg. txtCustomerNumber. For database elements, the name property will inherit the name defined on the dictionary.

- **Back Color:** The background colour for the selected element. The colour will only be visible if the back style is set to "NORMAL"

- **Back Style:** Toggles whether the element has a solid colour background or a transparent background. (Background colours can be defined on a style)

- **Can Grow:** Toggle if the element can grow to fit the data. If set to "No" the element will remain the designed height and width. If set to "Yes" the elements height will grow to the maximum size of the section to accommodate the data set.

- **Can Shrink:** Toggle if the element can grow to fit the data. If set to "No" the element will remain the designed height and width. If set to "Yes" the elements height will grow to the maximum size of the section to accommodate the data set.

- **New Page:** Sets when the section should render a new page.

  NONE - No new page is created.
  BEFORE - A new page is forced before the current section is rendered.
  AFTER - A new page is forced after the current section is rendered.
  BEFORE AND AFTER - A new page is forced before and also after the current section is rendered.

Position

- **Height:** The height of the elements in terms of pixels.
- **Visible:** Setting this option to "No" allows the element to exist on the canvas, but not be visible at run-time.

Scripting

- **Functions:** Click the ellipsis (...) to edit scripts for this page. By clicking this button the script editor will be loaded ready for input. Any scripts written through this section will belong only to this page, and can only be accessed from this page.

- **onFormat:** This script fires after the data is loaded and bound to the controls contained in this section, but before the section is rendered on the canvas.

  The format event is the only event where the section's height may be changed. This section may be used to set or change the properties of any controls.

  If the canGrow or canShrink property of any control contained within a section, or the section itself, is set to true, all of the growing and shrinking of controls contained in this section, and the section itself, takes place in this event. Because of this, information about a control or section's height cannot be obtained in this event.

- **on-BeforePrint:** This event fires before the section is rendered to the canvas.

  The growing and shrinking of the section and all controls contained in a section have already taken place by the time this event fires. Use this section to resize any controls if needed.

  Since all controls and section growth have already taken place by the time this event fires, this event may be used to get an accurate height of the section or any controls in it. You may resize any controls in this event, but you cannot resize the section itself.

  on-AfterPrint: This event fires after the section is rendered to the canvas. This event is mainly used for drawing on the canvas after text has already been rendered on the canvas

Page Header

By default, a Report is created with a Page Header and Page Footer option (unless the Report is a sub Report).

The Page Header should contain the information that you wish to print on every page.

Page Header Properties

To view the Page Header properties

Steps:
1. Position the cursor in the Page Header section.
2. Right click with the mouse.
3. Select Sec-Properties to display the following options

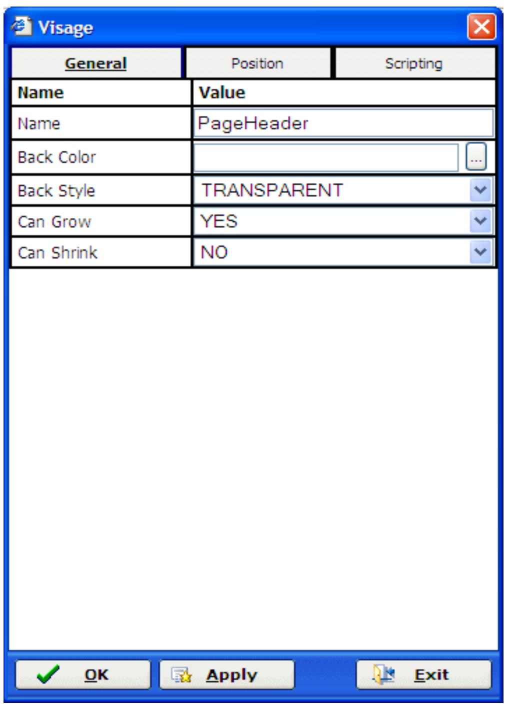


Figure 18: Report Page Header General Properties

You have options of changing the following:

- **Back Colour:** Select the eclipse button (…) and make your selection. Leave as default if no change is required.
- **Back Style:** Select required option from the drop down menu. Leave as default if no change is required.
- **Can Grow:** Allows you to toggle the Page Header to fit the data. If set to 'No' the Report Header will remain the designed height and width and data will be truncated if it does not fit into the designed height and width. If set to 'Yes" the Report Header height will grow to the maximum size to accommodate the data and No data will be truncated.

- **Can Shrink:** Allows you to toggle the Page Header to fit the data. If set to 'No' the Report header will remain the designed height and width. It set to 'Yes' the Header height will decrease to accommodate the data set.

Group Header

The Group Header should contain the 'group' elements that are common to every page of the document/report you will be printing. If you are generating an Invoice - the Invoice Number, Customer name, Delivery address and postal address, and invoice date could be common to every page. .

You can have up to 5 levels of Group Headers.

Add Group Header

To add a Group Header to your Report:

Steps:

1. Position the mouse within the Reporter Window,
2. Right click with your mouse and select the G-Head/Foot option.
3. Left Click G-Header/Foot option. A Group Header and Footer will then be added to your report.

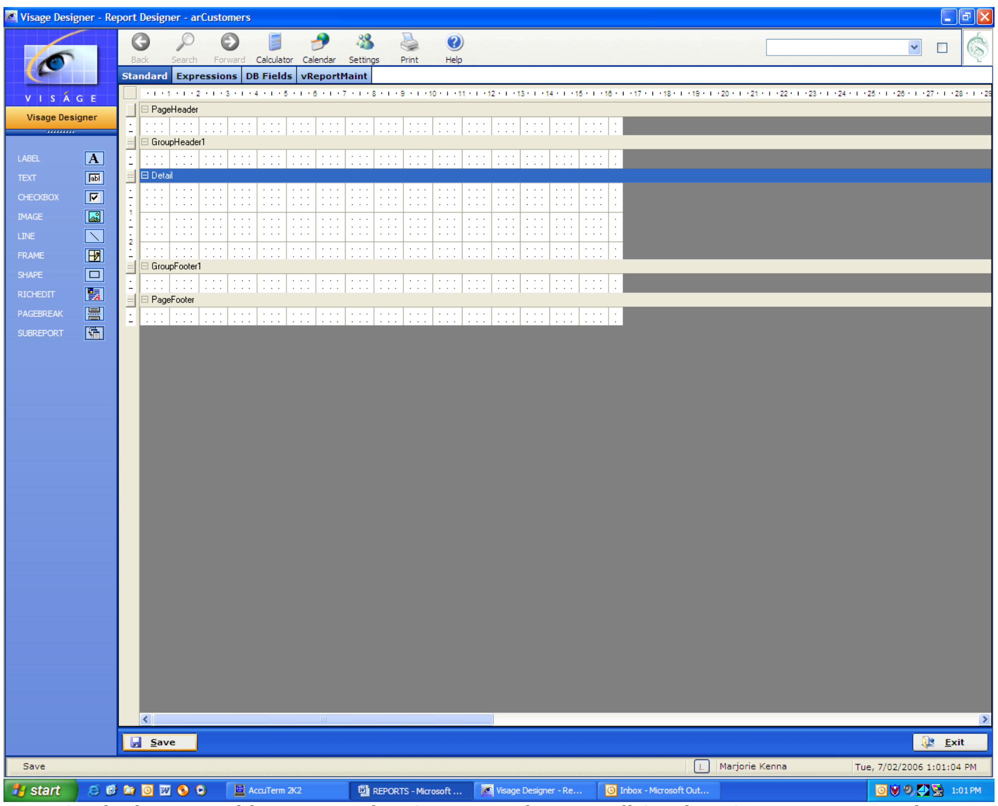


Figure 19: Blank report with Page Header, Group Header1, Detail Section, Group Footer1 and Page Footer

Group Header Properties

To view the Group Header properties

Steps:
1. Position cursor within the Group Header section.
2. Right click with the mouse
3. Left click on Sec-Properties and you will see the following attributes

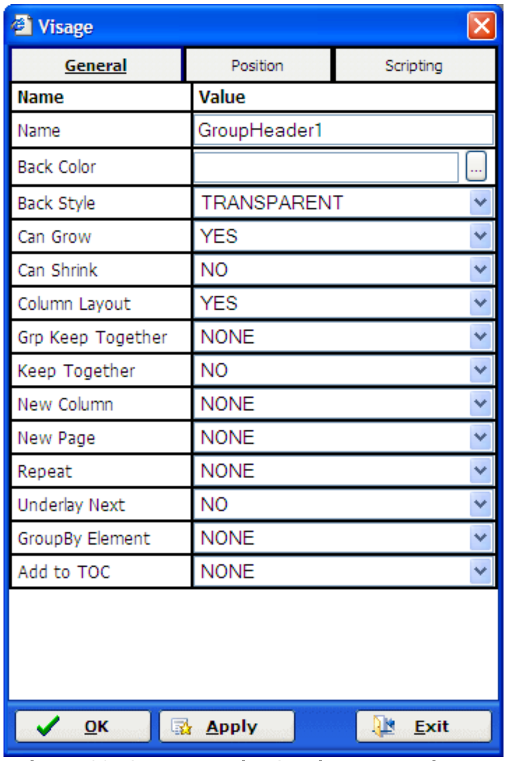


Figure 20: Group Header Section Properties

View Group Header Properties

- **Name**: A unique identifier for the element. The name property is used by the system to reference individual elements. For non-database types it is recommended that the user set a meaningful name. eg. txtCustomerNumber. For database elements, the name property will inherit the name defined on the dictionary.

- **Back Color**: The background colour for the selected element. The colour will only be visible if the back style is set to "NORMAL".

- **Back Style**: Toggles whether the element has a solid colour background or a transparent background. (Background colours can be defined on a style)

- **Can Grow**: Toggle if the element can grow to fit the data. If set to "No" the element will remain the designed height and width. If set to "Yes" the elements height will grow to the maximum size of the section to accommodate the data set.

- **Can Shrink**: Toggle if the element can shrink to fit the data. If set to "No" the element will remain the designed height and width. If set to "Yes" the elements height will decrease to the to accommodate the data set

- **Column Layout**: This determines whether a group header section should use the same column layout of its detail section. When this property is true, the number of columns in a detail section will be reflected in the associated group headers and footers.

- **Grp Keep Together**: This determines whether group header and footer sections will print as a single block on the same page.

  The property defaults to NONE, which allows the group block to be split across pages.

  When you set this property to ALL, Viságe attempts to print the complete block on the same page without any page-breaks. When a complete block does not fit on a single page, it will be split across two or more pages.

  The third option prevents any windowed group header sections. The group header will always print with at least one detail section

- **Keep Together**: This property determines whether a section should print in its entirety on the same page. When you set this property to true, the section will print on the same page without any page breaks. A false setting allows the section to be split across two or more pages.

- **New Column**: Determines whether Visage should insert a column-break before and/or after printing the section.

- **New Page**: Sets when the section should render a new page.

  - NONE - No new page is created.
  - BEFORE - A new page is forced before the current section is rendered.
  - AFTER - A new page is forced after the current section is rendered.
  - BEFORE AND AFTER - A new page is forced before and also after the current section is rendered

- **Repeat**: This determines whether a group header section should be printed again before its associated detail section when the detail section is broken across multiple pages or columns

- **Underlay Next**: Underlay Next property determines whether the section should print underneath the following section. The following section will start printing from the top coordinate of the under-laid section instead of the bottom co-ordinate.

- **GroupBy Element:** Group-By Element property determines which element is used to break a section. The group-by element should be in sorted order and have the repeat flag turned on in the parent designer screen. Every time a change occurs in the data of the group-by element the detail section will break and the group header will be rendered.

GroupBy Example:

If your report is in the following format:

Report Heading		
Column 1 Heading	Column 2 Heading	Column 3 Heading
Data	Data	Data
Data	Data	Data
Data	Data	Data

In this example the GroupBy Element has been set to none. The report will print with the data in columns below each column heading as above.

If however you wish to group your report by the data contained in the first column heading as an example you would set the GroupBy Element to the field name referenced in Column 1.

Report Heading		
Column 1 Heading	Column 2 Heading	Column 3 Heading
Data	Data	Data
Column 1 Heading	Column 2 Heading	Column 3 Heading
Data	Data	Data
Column 1 Heading	Column 2 Heading	Column 3 Heading
Data	Data	Data

The report would then be formatted/grouped as above.

- **Add to TOC**: The AddTo TOC property allows the designer to select which field should be added to the table of contents. The table of contents is available from the toolbar when running a report or if the report has been exported to PDF.

Examples of Reports with Page Headers and Group Headers

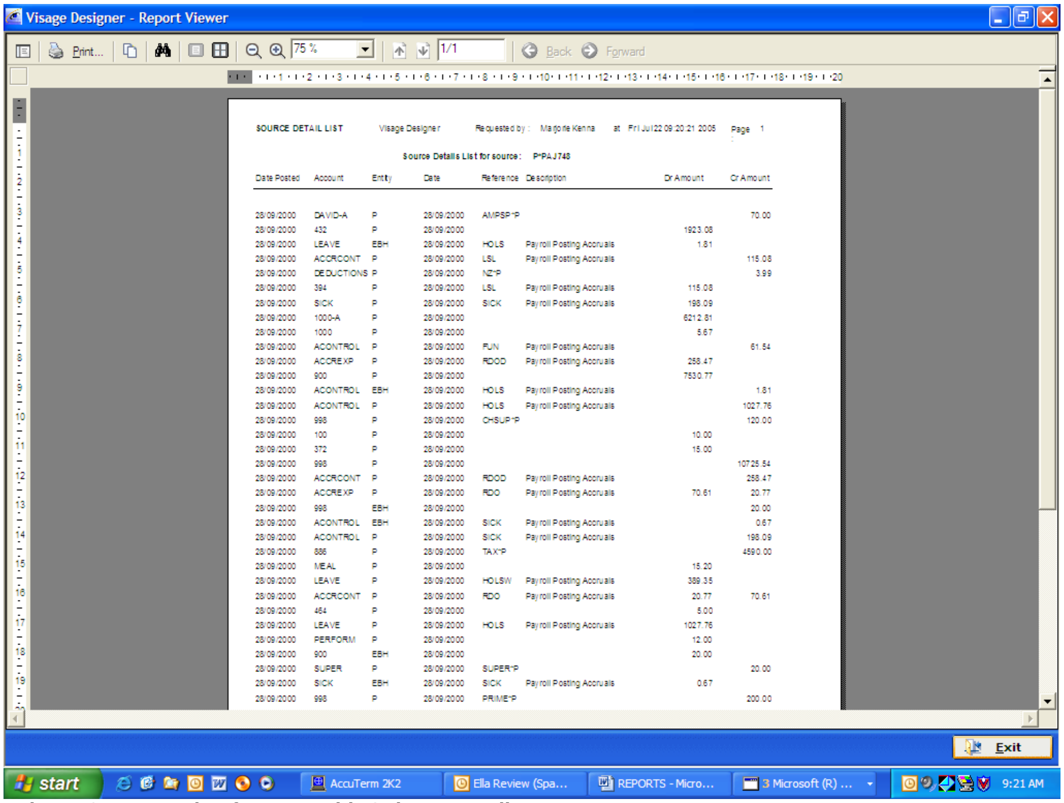


Figure 21: Example of Report with Column Headings

The Page Header should contain the information that you wish to print on every page. See example of arDocEnt below.

The Group Header should contain the 'group' elements eg. Invoice to customer details of name and delivery address and postal address, Invoice number and date etc… that exist for every document you are printing.

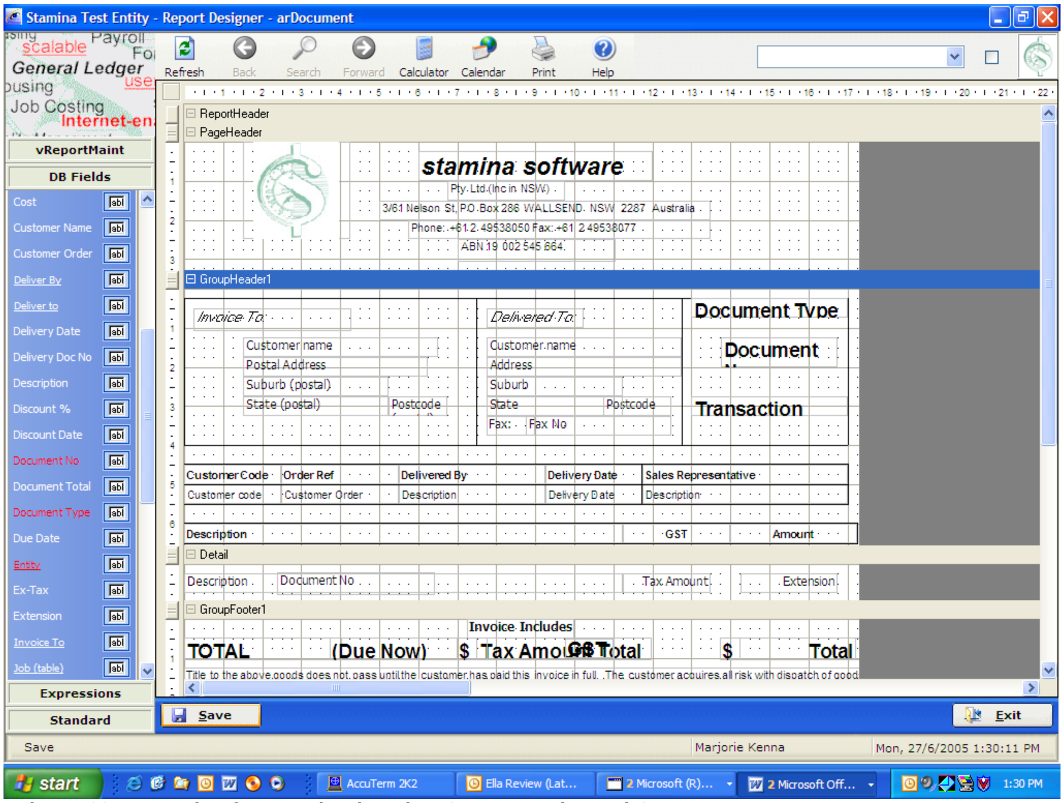


Figure 22: Example of report that is using Group Header and Group Footer

For documents produced from ArDocuments – Tax Invoice and Credit Notes, OE Invoices – Tax Invoices and Credit Notes etc… and you wish to set up a Viság̃e Report template you will need to use Group Headers and Group Footers. This is so that if the invoice/credit prints over 1 page, the totals print at the bottom of the last page as well as the information contained in the group header will print at the top of each page. If the Invoice/credit only prints on 1 page, the totals will also print at the bottom of the page.

The 'lines' of the Invoice should be contained in the Detail section of the report. Eg. The items being charged eg. products, services etc..

Group Footer

The Group Footer can be used in conjunction with the GroupBy Element.

The Group Footer can contain the Totals relating to the document being printed. Eg. Document/Invoice Total, Total GST, Totals for columns of data - total debits, total credits, plus any other information you want printed at the bottom of your Report.

From the Section Properties of the Group Footer section you have an option to have the Group Footer to print at the bottom.

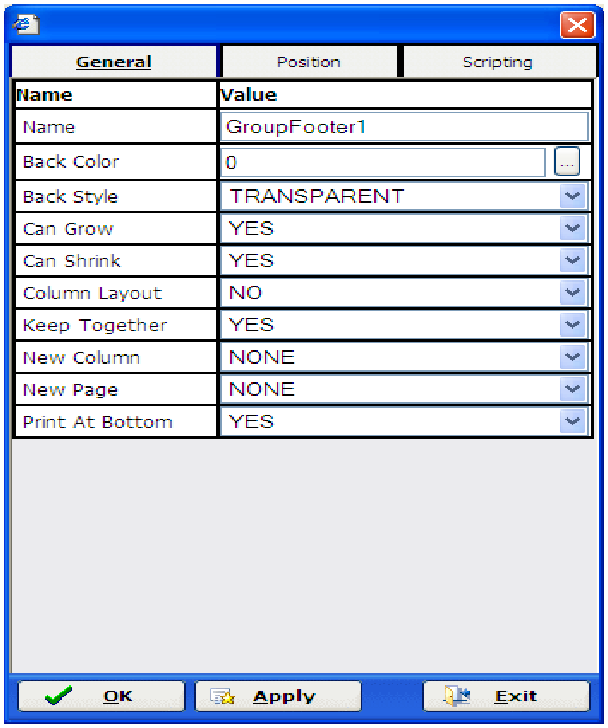


Figure 23: Group Footer Options

- **Name:** This is the default name for this GroupFooter.
- **Back Color:** Select Eclipse button (…) to change the back color if required.
- **Back Style:** Make your selection from drop down list if any change is required.
- **Can Grow:** Allows you to toggle the element to fit the data. If set to 'No' the element will remain the designed height and width and data will be truncated if it does not fit into the designed height and width. If set to 'Yes' the elements height will grow to the maximum size of the section to accommodate the data set. No data will be truncated.
- **Can Shrink:** Allows you to toggle the element to fit the data. If set to 'No' the element will remain the designed height and width. If set to 'Yes' the elements height will decrease to accommodate the data set.
- **Column Layout:** This determines whether a group header section should use the same column layout of its detail section. When this property is true,

the number of columns in a detail section will be reflected in the associated group headers and footers

- **Keep Together:** This property determines whether a section should print in its entirety on the same page. When you set this property to true, the section will print on the same page without any page breaks. A false setting allows the section to be split across two or more pages.

- **New Column:** New column determines whether Visage should insert a column-break before and/or after printing the section.

- **New Page:** Sets when the section should render a new page.

  NONE - No new page is created.

  BEFORE - A new page is forced before the current section is rendered.

  AFTER - A new page is forced after the current section is rendered.

  BEFORE AND AFTER - A new page is forced before and also after the current section is rendered

- **Print at Bottom:** Sets the Group Footer details to print at the bottom of the last page if set to Yes. It not set the Group Footer details will print wherever the report finishes.

Example:
If you have set up your report with a GroupBy Element of Column1 for example, then have set up details for your Group Footer, those details in your group footer will print below the data details. Eg.

Column 1 Heading	Column 2 Heading	Column 3 Heading
Data	Data	Data
Group Summary details will print here		
Column 1 Heading	Column 2 Heading	Column 3 Heading
Data	Data	Data
Group Summary details will print here		

Eg: Page 1 of your report

If however you have set up the Group Footer Section Properties for the Group Footer to ‘Print at Bottom’ = Yes the report will print as follows:

Column 1 Heading	Column 2 Heading	Column 3 Heading
Data	Data	Data
Group Summary Details will print at bottom of page		

Eg: Page 1 of your Report

Design Elements

Within the *Visage* Report Designer, the design elements fall into one of three broad categories:

Standard - The most commonly used Report Elements.

Expression - Dynamic Report Elements.

DB-Fields - Data bound Elements.

To switch between Categories of Design Elements, position your mouse pointer over required element and left click mouse button.

Place a Design Element onto the Canvas

Steps:

1. Position cursor over icon to the right of the required element name in the Navigation section on left side of screen - Screen 2 of Viságe Reporter.

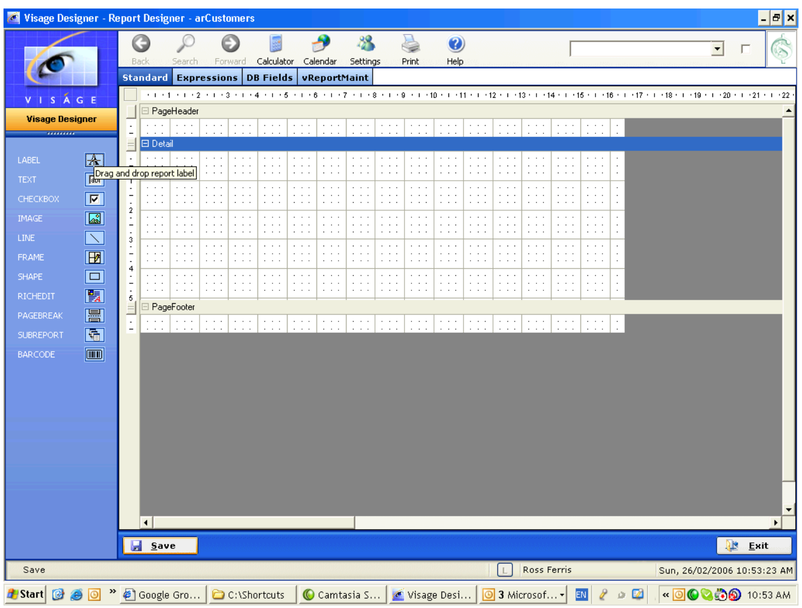


Figure 24: Add a Design Element to the canvas

2. Left click with mouse, while holding down left mouse button drag icon to required location on the canvas area. Release left mouse button to drop in the required location.

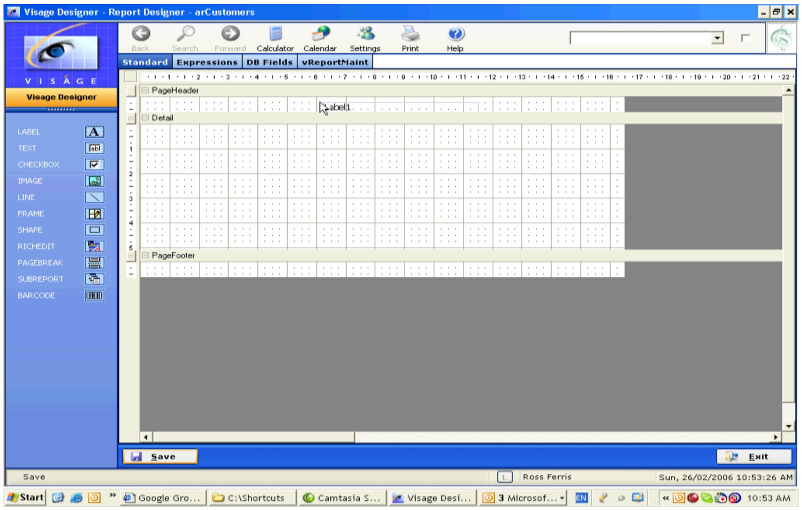


Figure 25: Design Element added to canvas

Select an Element on the Canvas Area

To select a single element - position the mouse pointer over the element, left click mouse button. To select more than one element at a time, hold either the "*Ctrl*" or "*Shift*" keys while you left click each element with mouse. Clicking on an element that has already been selected whilst holding either of these keys will de-select it.

Re-position an Element

To re-position an element already placed onto the canvas – position the mouse pointer over the element, left click mouse button, hold the left mouse button down move the mouse to re-position the element. Release the mouse button to place element in new location. You will typically be limited to moving the element within the confines of the visible areas of the canvas or container element, unless scrollbars are visible.

The position of the element can also be changed through the element's Properties editor. Select required element, Right click mouse button, Scroll down list until Properties option is highlighted, left click *"Properties"* Tab, enter required details in either Left, Top, Height or Width selection. Making changes to either left or top option will reposition the element to left or top of screen. Making changes to either Height or Width option will adjust the Height or Width of the element.

Resize an Element

To resize an item already placed onto the canvas, or into a container element such as a Frame, select it, then move the mouse near the edge of the item. When the mouse pointer changes into a directional arrow, press and hold the left mouse button, move the mouse in the direction, then release the mouse button to resize the element. Resizing the element with the mouse cursor near one of the element's corners will resize its height and width simultaneously. The dimensions of the element can also be changed through the element's property editor. To access the property editor for an element, click the right mouse button on the element and select the "*Properties*" option. Make required changes by adjusting Height or Width options.

Remove an Element

To remove an element from the canvas, simply select the element by clicking with left mouse button. Press the "*Delete*" key on your keyboard. You may also remove an element by selecting the element, click the right mouse button and select the "*Delete*" option from the context-menu that appears.

Standard Tab

Add a Label Element from the Standard Tab to your report.

Standard Tab Elements

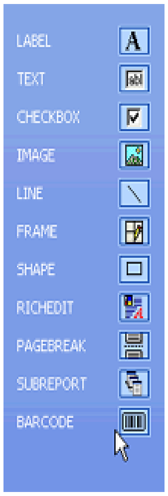


Figure 26: Standard Elements options.

Steps:

1. Position cursor over desired Element logo eg. Label. Cursor image will change from arrow to a hand.

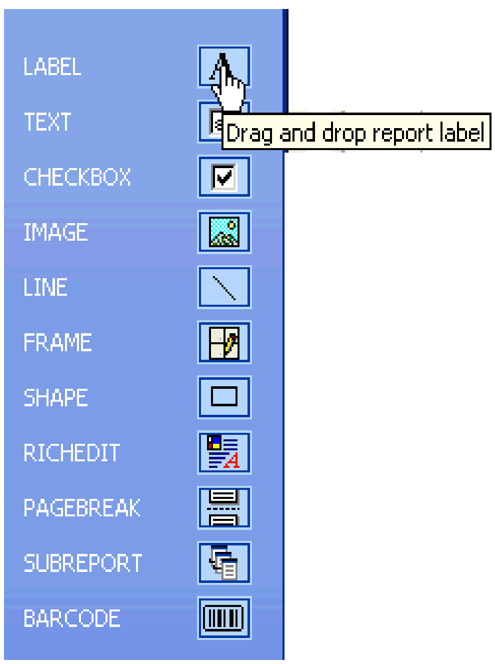


Figure 27: Select Label Element to add to a report

2. With cursor positioned over required element (ie. Mouse pointer is a hand NOT an arrow), left click mouse button, drag element to required location on your

report design screen. Release mouse button to position element in required location.

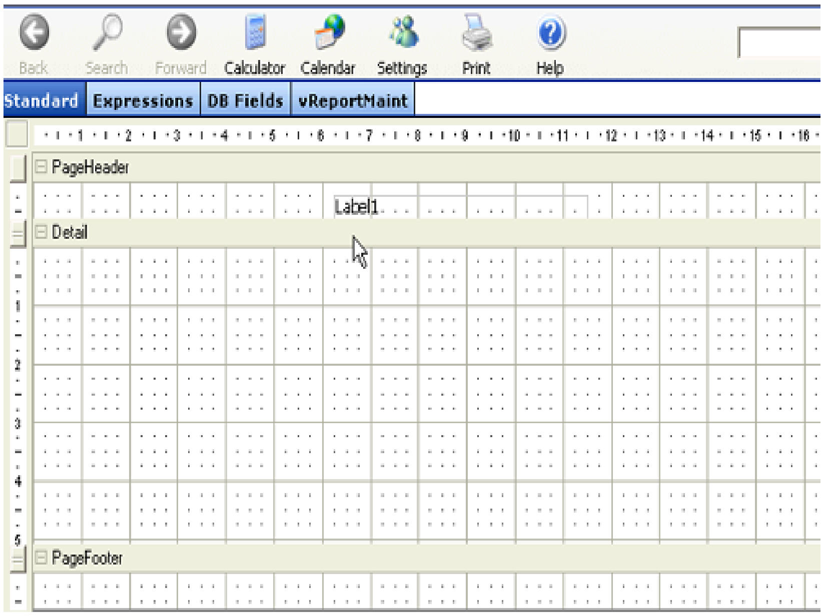


Figure 28: Label Element added to PageHeader of report.

A Label Standard Element has been added to this Report in PageHeader Band.

Label Element

Right Click the element to view the Properties. You can amend the Properties if required.

General

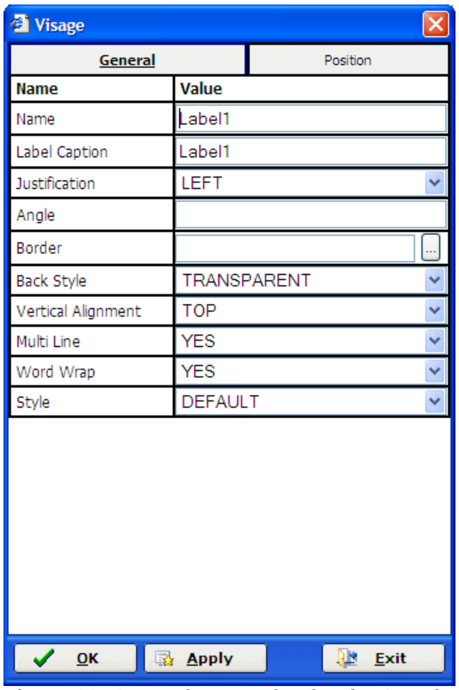


Figure 29: General Properties for the Standard Label Element

- **Name:** Defaults with element name and number of elements in current report. eg. Label1 indicates this element is a label and there is 1 label in this report.. If you add an additional Label, the name on that will change to be Label2. You can change this name if you wish.
- **Label Caption:** Enter as free text the label details you want to appear on your report.
- **Justification:** Make your selection from the drop down list of how you want to justify this label. e.g. Left, Right or Center. .
- **Angle:** If you want this label to appear on an angle, enter the angle number in this field or simply leave this field blank. Usually this field is left blank as by default all labels will be 90 degrees.
- **Border:** If you want this label to have a border, select the required border. *(see Standard Tab Elements - Borders to add Borders).*
- **Back Style:** Determines whether the element has a solid colour background or a transparent background. Make your selection from the drop down list.
- **Vertical Alignment:** Determines where the Text value should be printed relative to the Top, middle and bottom edges of the field
- **Multi Line:** Determines whether the contents of the field should wrap across multiple lines. When set to No, the text is limited to a single line regardless of the height or Can Grow properties. .
- **Word Wrap:** Determines whether the labels caption will wrap. If the caption is longer than the label, setting word wrap to false will truncate the caption at the end of the label instead of truncating the caption after the last full word.

When setting Word Wrap to true, Multi Line must also be set to true.

- **Style:** Make your selection from the drop down list to change the Style.

Position

The Position Tab of the Label element contains the following options

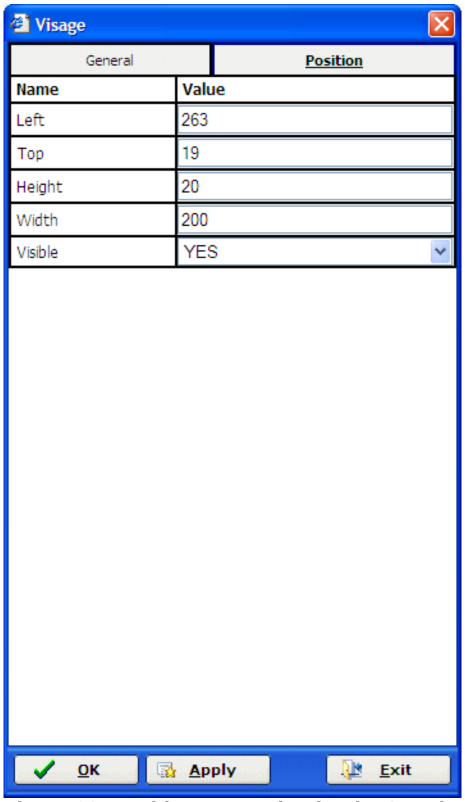


Figure 30: Position Properties for the Standard Label Element

- **Left**: The element's x-coordinate representing its location on the canvas. The coordinate is based on the left edge of the element.
- **Top**: The element's y-coordinate representing its location on the canvas. The coordinate is based on the top edge of the element.
- **Width**: The width of the element in terms of pixels.
- **Height**: The height of the element in terms of pixels.
- **Visible**: Setting this option to 'No' allows the element to exist on the canvas, but not be visible at run time.

After you have made your selections click Apply, then select Exit.

Text Element

Add a Text Element from the Standard Tab options to your report.

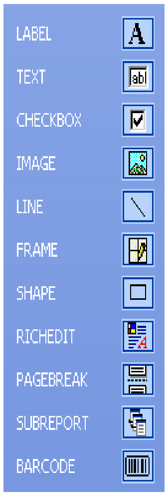


Figure 31: Standard Elements options.

Steps:

1. Position cursor over Text Element logo. Cursor image will change from arrow to a hand.

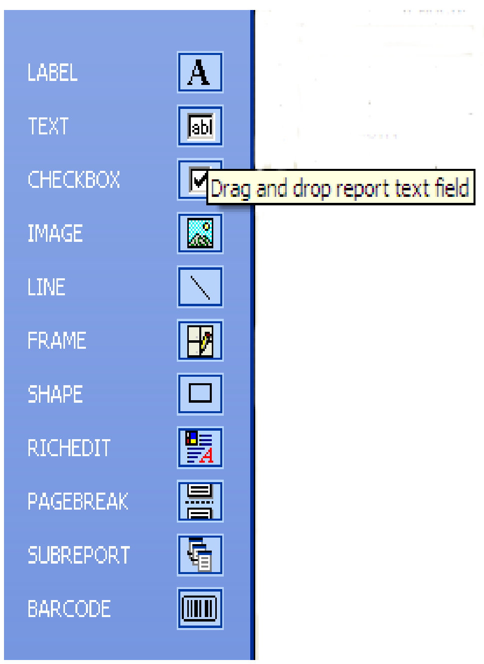


Figure 32: Select Text Field to add to a report.

2. With cursor positioned over required element (ie. Mouse pointed is a hand NOT an arrow) left click mouse button, drag element to required location on your report design screen. Release mouse button to position in required location.

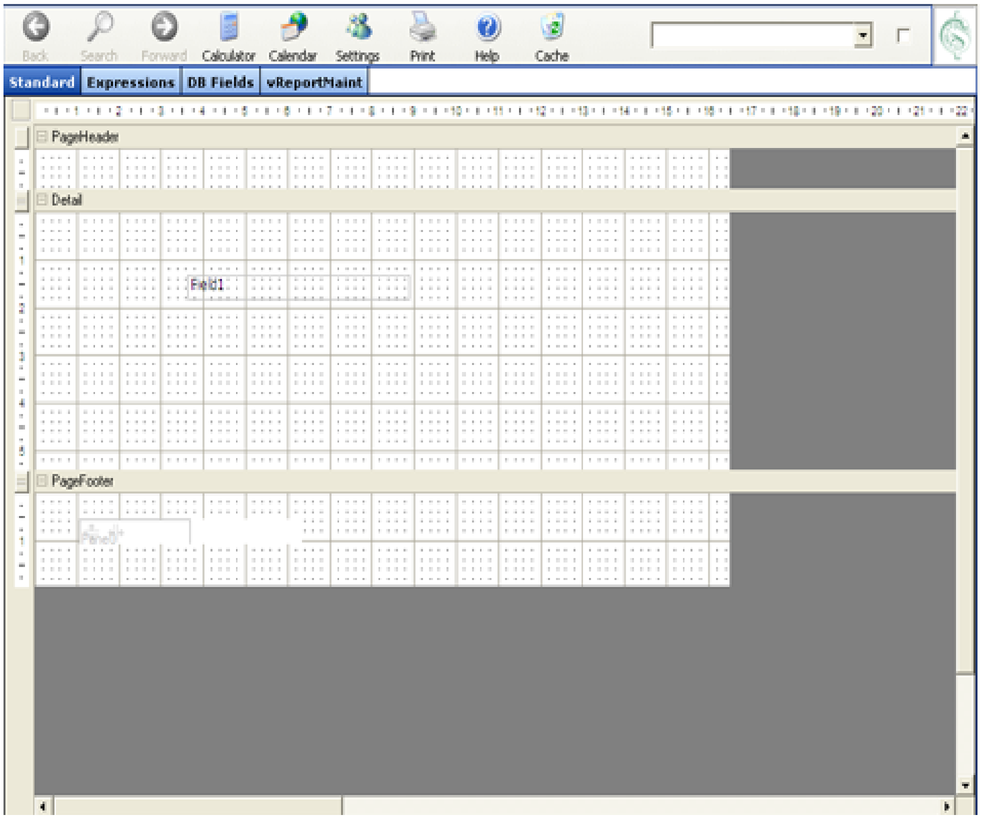


Figure 33: Standard Text Element has been added to the details section of the report.

A Text Element has been added to your report.

Text Element – Properties

Right Click the element to view the Properties. You can amend the properties if required.

General:

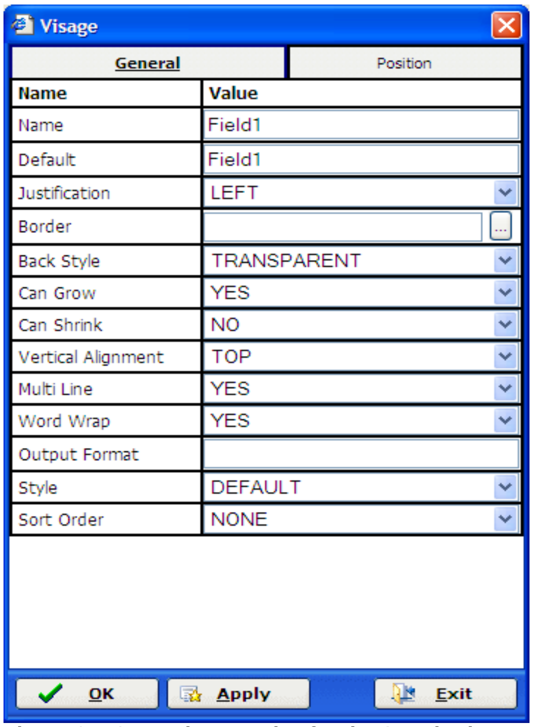


Figure 34: General Properties for the Standard Text Element

A Label and a Text Element are very similar. You have additional options with a Text Element eg. , Can Grow, Can Shrink, Output Format and Sort Order.

- **Can Grow:** Allows you to toggle the element to fit the data. If set to 'No' the element will remain the designed height and width and data will be truncated if it does not fit into the designed height and width. If set to 'Yes' the elements height will grow to the maximum size of the section to accommodate the data set. No data will be truncated.
- **Can Shrink:** Allows you to toggle the element to fit the data. If set to 'No' the element will remain the designed height and width. If set to 'Yes' the elements height will decrease to accommodate the data set.
- **Output Format:** If you wish to format the data contained in this field in a particular manner, set the format here. If no formatting is required, leave this field blank. E.g. This field contains numbers you want to format the output to appear as $x,xxx.00. In this example you would enter the output format as $x,x0.00
- **Sort Order:** This is used if you wish to set a sort order by this field for your report. Options are Ascending or Descending. If you do not wish to sort your report by this field, leave it set to the default of none.

Position

The Position Tab of this Text element window contains the following properties

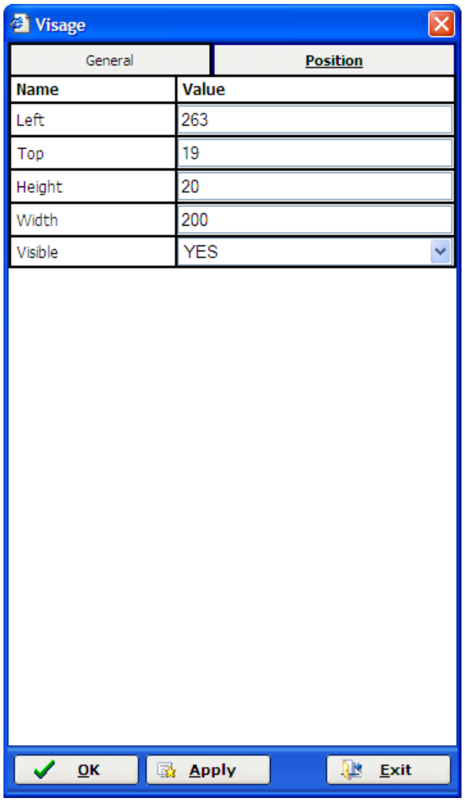


Figure 35: Position Properties for the Standard Text Element

- **Left**: The element's x-coordinate representing its location on the canvas. The coordinate is based on the left edge of the element.
- **Top**: The element's y-coordinate representing its location on the canvas. The coordinate is based on the top edge of the element.
- **Width**: The width of the element in terms of pixels.
- **Height**: The height of the element in terms of pixels.
- **Visible**: Setting this option to 'No' allows the element to exist on the canvas, but not be visible at run time.

After you have made your selections click Apply, the Select Exit

Labels and Text Borders

Label and Text elements have a Border option.

The steps involved to set these elements to display with borders are

Steps:

1. Add either a Label or Text Element to your report.
2. Select the element
3. Right click element to display Properties
4. Select ellipsis button (…)

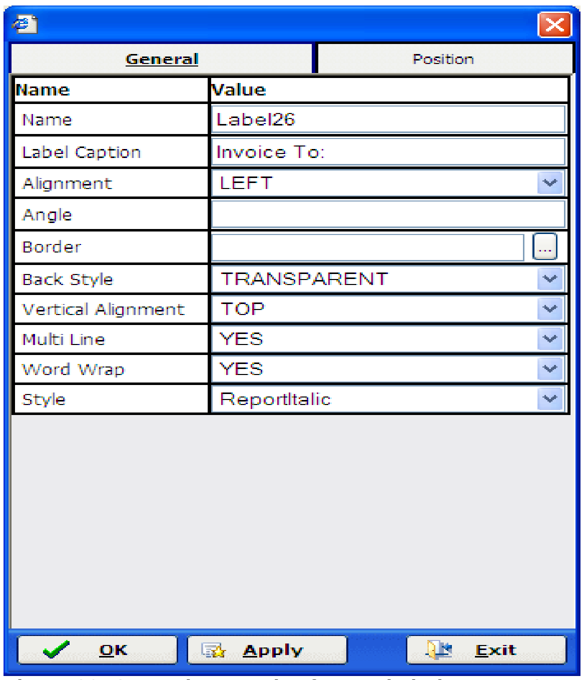


Figure 36: General Properties for a Label Element – Set a Border

5. Select Line Styles or Presets to add a border to your element.

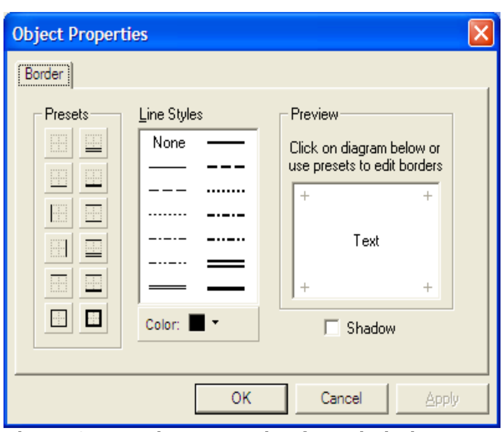


Figure 37: Border Properties for Label Element

6. Click OK when finished.

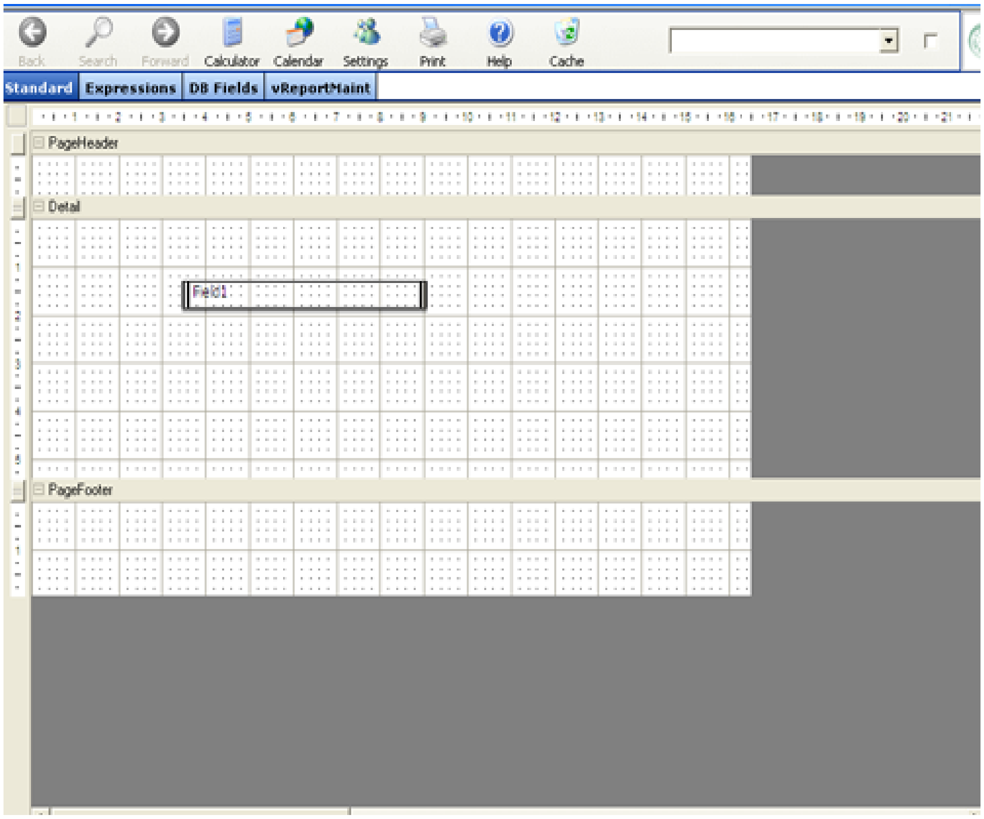


Figure 38: Field 1 with border

Check Box

Add a Check Box Element to your Report:

Steps:

1. Drag and drop the Check Box Element to your Report.
2. Position the Element to your desired location on your report.
3. Right Click the element to view the Properties.

   You can amend the Properties if required,

General:

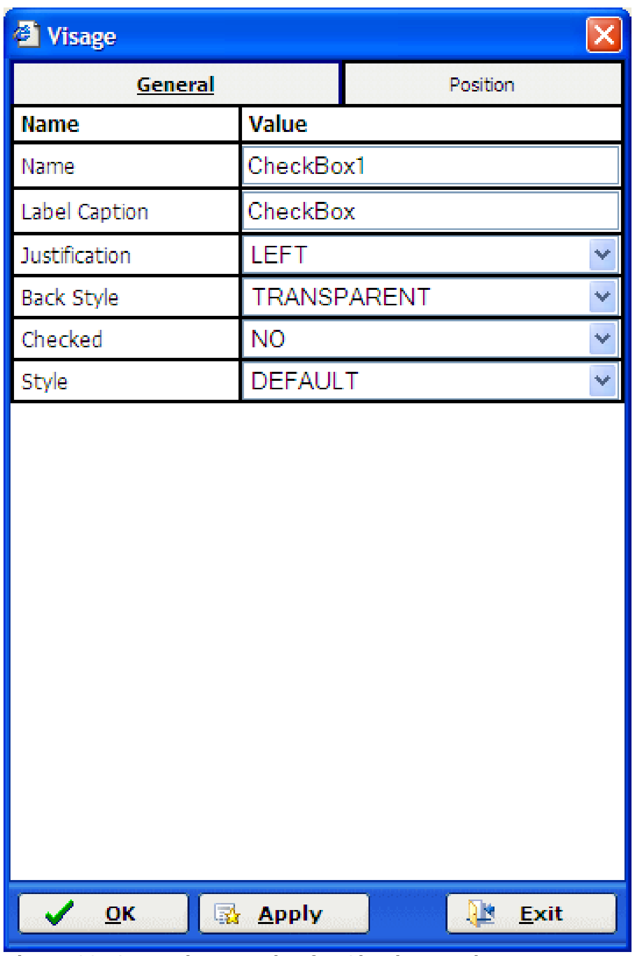


Figure 39: General Properties for Check Box Element

- **Name:** Defaults with element name and number of elements in current report. eg. CheckBox1 indicates this element is a CheckBox and there is 1 CheckBox in this report. If you add an additional CheckBox, the name on that will change to be CheckBox2. You can change this name if you wish.

- **Label Caption:** Enter as free text the label details you want to appear on your report beside this element.
- **Justification:** Determines whether the text appears to the left, right or centre of the element.
- **Back Style:** Determines whether the element has a solid colour background or a transparent background. Make your selection from the drop down list.
- **Checked:** This is the initial default state of the check box. eg. Checked or Not Checked.
- **Style:** Make your selection from the drop down list.

Position

The Position Tab of this Text element window contains the following properties

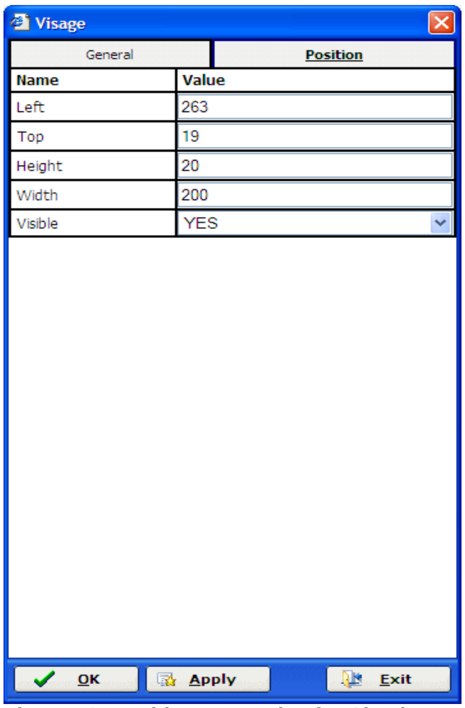


Figure 40: Position Properties for Check Box Element

- **Left**: The element's x-coordinate representing its location on the canvas. The coordinate is based on the left edge of the element.
- **Top**: The element's y-coordinate representing its location on the canvas. The coordinate is based on the top edge of the element.
- **Width**: The width of the element in terms of pixels.
- **Height**: The height of the element in terms of pixels.
- **Visible**: Setting this option to 'No' allows the element to exist on the canvas, but not be visible at run time.

After you have made your selections click Apply, the Select Exit

Image

Add an Image Element to your Report:

Steps:

1. Drag and drop the Image Element to your Report.

2. Position the Element at the required location on your report and release the mouse button.

3. Right Click the element to view the Properties.

   You can then amend those Properties if required.

General:

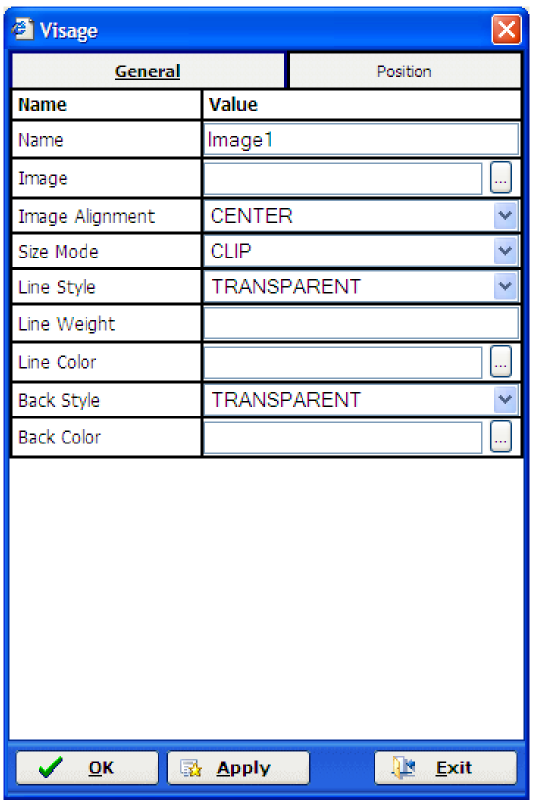


Figure 41: General Properties for Image Element

4. Select the (…) Ellipsis button to the right of the Image section and browse to find the Image you want to insert into your report.

The options in this element are:

Image Alignment: Sets the alignment of how the image will be positioned in the rectangular field area
Size Mode: Sets the size mode on how the image will appear on the report.
Line Style: Select a different line style from the drop down selection.
Line Weight: Determines the thickness of the line. The higher the value, the thicker the line.

Line Colour: Select the (…) ellipsis button to select a line colour.
Back Style: Determines whether the element has a solid colour background or a transparent background
Back Color: Determines the background colour for the selected element. The colour will only be visible if the back style is set to NORMAL

If none of these additional options are required, simply leave the fields set at the defaults.

Position

The Position Tab of this Image element window contains the following properties

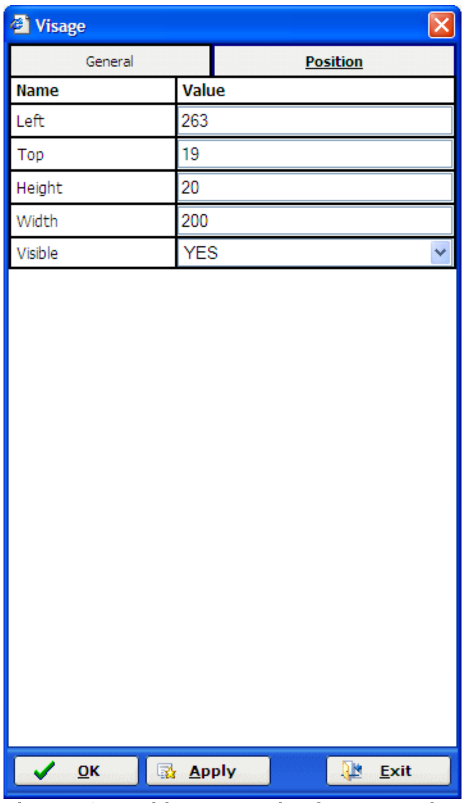


Figure 42: Position Properties for Image Element

- **Left**: The element's x-coordinate representing its location on the canvas. The coordinate is based on the left edge of the element.
- **Top**: The element's y-coordinate representing its location on the canvas. The coordinate is based on the top edge of the element.
- **Width**: The width of the element in terms of pixels.
- **Height**: The height of the element in terms of pixels.
- **Visible**: Setting this option to 'No' allows the element to exist on the canvas, but not be visible at run time.

After you have made your selections click Apply, then select Exit

Line

Add a Line Element to your Report:

Steps:

1. Drag and drop the Line Element to your Report.

2. Position the Element at the desired location on your report and release mouse button.

3. Right Click the element and you have the following Properties

   You can amend the Properties if required.

General:

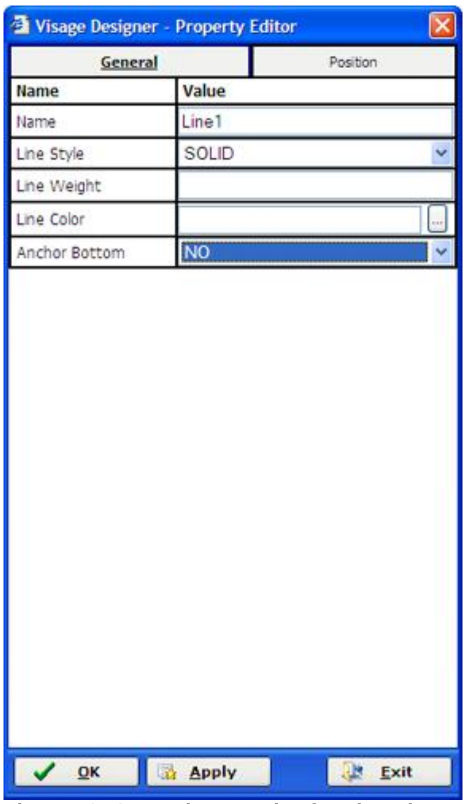


Figure 43: General Properties for Line Element

- **Line Style:** Select Solid, Dash, Dot or Dash-Dot from the drop down list.

- **Line Weight:** Enter a number to define the line thickness. eg.1 for thin, 2 for slightly thicker and 3 for thicker.

- **Line Color:** Select the ellipsis button (…) to change the line Color.

- **Anchor Bottom:** When set to true will automatically stretch the line to the bottom of the current section. This will allow for vertical lines on a section by section basis to auto grow.

Position:

The Position Tab of this Line element window contains the following properties

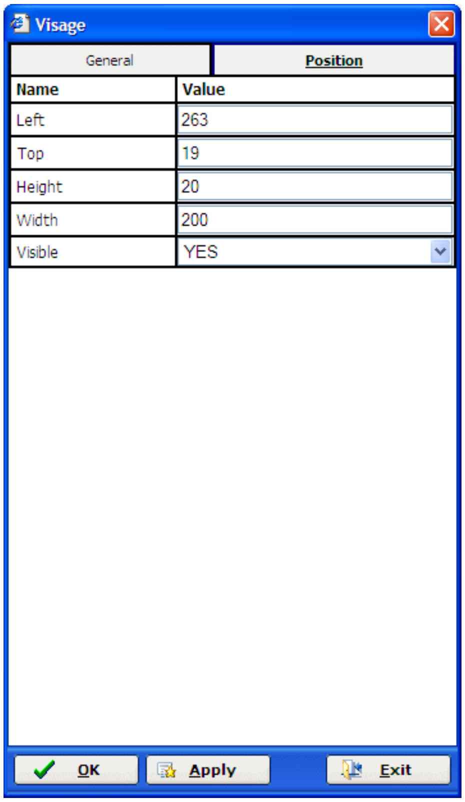


Figure 44: Position Properties for Line Element

- **Left**: The element’s x-coordinate representing its location on the canvas. The coordinate is based on the left edge of the element.
- **Top**: The element’s y-coordinate representing its location on the canvas. The coordinate is based on the top edge of the element.
- **Width**: The width of the element in terms of pixels.
- **Height**: The height of the element in terms of pixels.
- **Visible**: Setting this option to ‘No’ allows the element to exist on the canvas, but not be visible at run time.

After you have made your selections click Apply, the Select Exit

Frame

A frame element is a container where fields/elements can be positioned inside the container. If the frame is moved or deleted, all the elements in the frame are moved or deleted. Unlike a shape, where elements positioned behind the shape cannot be moved without the shape being moved, all elements inside the Frame can be moved by simply moving the frame. If you wish to delete one element from the frame, you only need to select that element and press the delete key.

When elements are initially added to a Frame, they will be docked inside the frame at the top left corner of the frame. You only need to select the element and drag to the required location in the frame.

A frame can be added to any section of your report.

To add a Frame Element into your report:

Steps:

1. Drag and drop the Frame Element to your Report.

2. Position the Frame Element at the desired location on your report and release the mouse button.

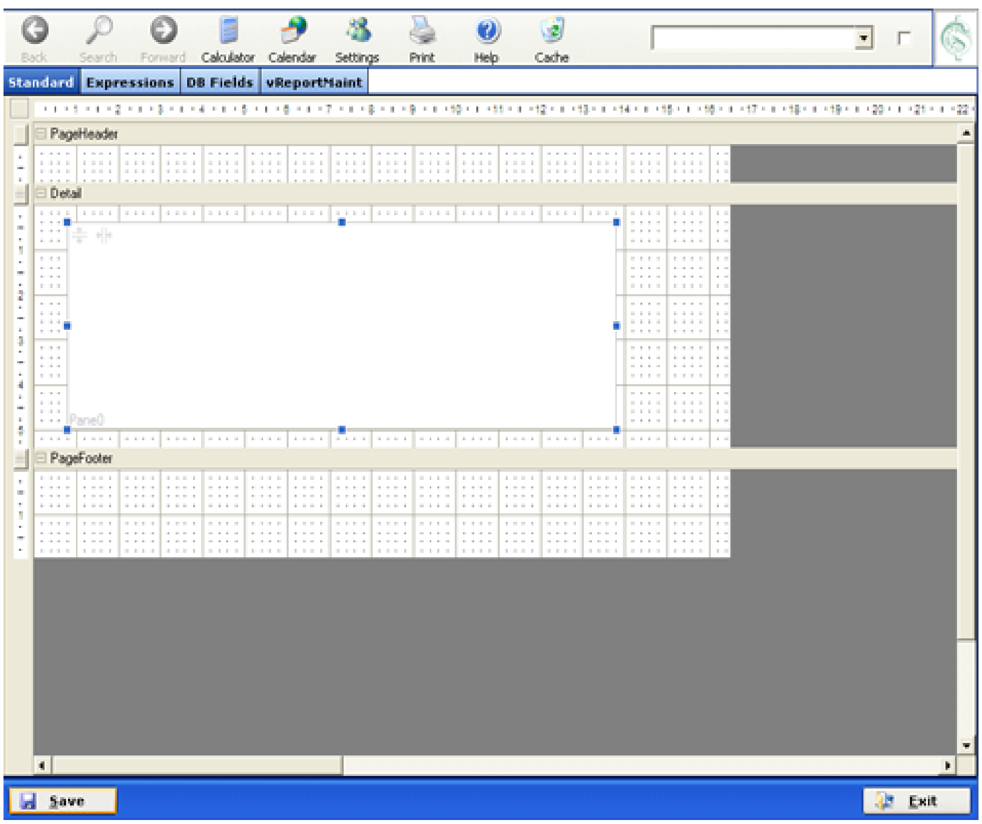


Figure 45: Frame added to Report Detail section.

3. With the Frame Element selected, Right Click with the mouse and you have the following Properties.

You can amend the Properties if required.

Figure 46: Frame Properties

- **Name:** This is a default name for the frame and does not appear on your report.
- **Back Colour:** Unless you need to change the background colour for your frame, leave as default. If you do need to change the background colour, select the eclipse button (…) and make your selection from the colour chart available. Click OK to make your selection.
- **Can Grow:** Allows you to toggle the element to fit the data. If set to 'No' the element will remain the designed height and width and data will be truncated if it does not fit into the designed height and width. If set to 'Yes' the elements height will grow to the maximum size of the section to accommodate the data set. No data will be truncated.
- **Can Shrink:** Allows you to toggle the element to fit the data. If set to 'No' the element will remain the designed height and width. If set to 'Yes' the elements height will decrease to accommodate the data set.

- **Border:** Select eclipse button (…) to make a selection if you require the frame to have a border.

Click ok when finished making changes.

Adding Elements to a Frame

You can add any element/field from the Standard, Expressions or DB Fields categories to a Frame.

Follow the same steps as listed through out this document to add elements/fields from either category to the frame on your report.

When adding elements/fields to a frame – position the element/field over the frame and then release the mouse button. The element/field will drop into the frame and be docked in the top left corner of the frame.

Simply select the element and position it in the required location of the frame, the same as you would reposition any element/field you added to your report screen.

NOTE!! You must add an element/field direct from either category direct into the frame. You cannot re-position an element/field already added to the report screen into a frame.

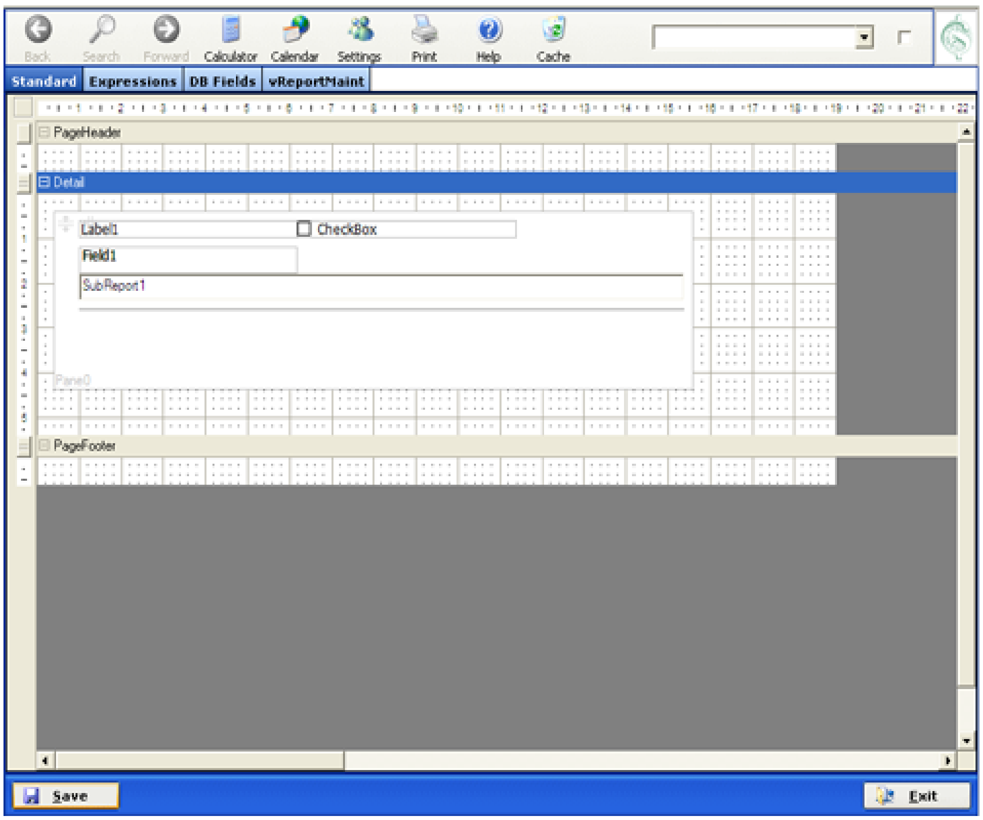


Figure 47: Sample Report with a number of items added to a Frame Element

Shape

Add a shape element to your report:

Steps:

1. Drag and drop the Shape Element to your Report.

2. Position the Element at the required location on your report and release the mouse button.

3. Right Click the element and you have the following Properties.

You can amend the Properties if required.

General:

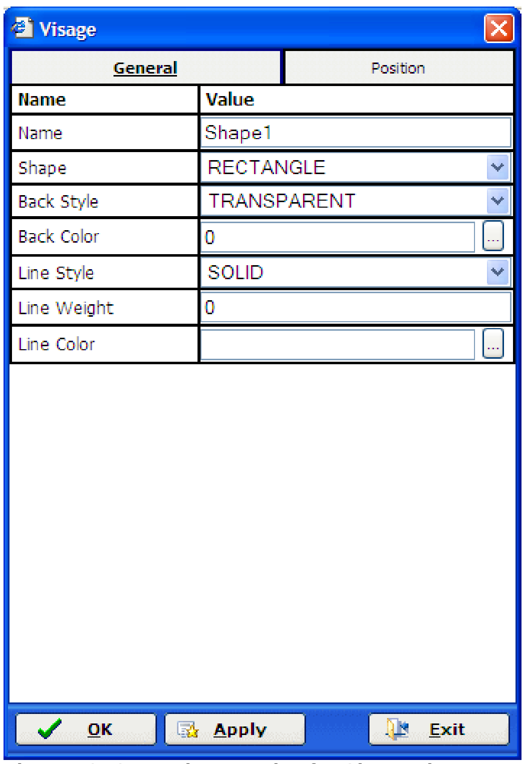


Figure 48: General Properties for Shape Element

If you insert a shape into your Report, and the shape overlaps other fields, you will not be able to select the other fields unless you move the shape away from those fields.

The shape is in front/ on top of the fields and as a result the fields cannot be selected until the shape has been moved away from the fields.

- **Shape:** Make your selection of Rectangle, Ellipse, or Rounder Rectangle
- **Back Style:** Make your selection form the drop down list
- **Back Color:** Determines the background color for the selected element. The color will only be visible if the back style is set to NORMAL
- **Line Style:** Select Solid, Dash, Dot or Dash-Dot from the drop down list.

- **Line Weight:** Enter a number to define the line thickness. eg.1 for thin, 2 for slightly thicker and 3 for thicker.
- **Line Color:** Select the ellipsis button (…) to change the line Color

If there are no additional options requiring changes, simply leave the fields set at the defaults.

Position:

The Position Tab of this Shape element window contains the following properties

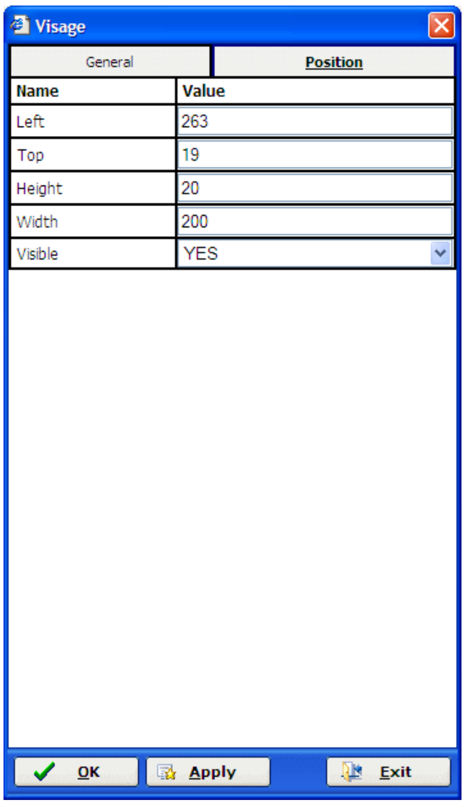


Figure 49: Position Properties for Shape Element

- **Left**: The element's x-coordinate representing its location on the canvas. The coordinate is based on the left edge of the element.

- **Top**: The element's y-coordinate representing its location on the canvas. The coordinate is based on the top edge of the element.

- **Width**: The width of the element in terms of pixels.

- **Height**: The height of the element in terms of pixels.

- **Visible**: Setting this option to 'No' allows the element to exist on the canvas, but not be visible at run time.

After you have made your selections click Apply, the Select Exit

Page Break

To insert a Page Break into your report at a pre defined location:

Steps:

1. Drag the Page Break element to your Report and position it where you want the Page Break to occur, release mouse button and page break will be inserted at that location on your report.

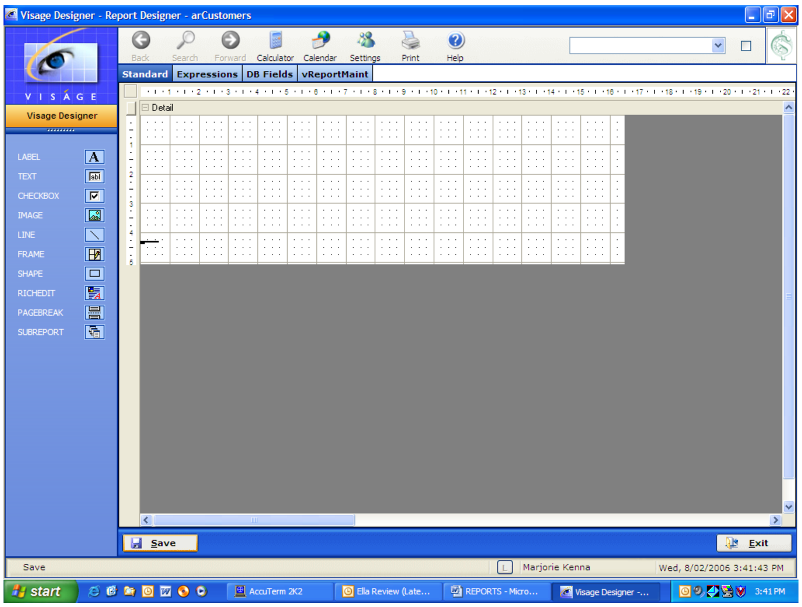


Figure 50: Blank report that has been set up with a Page Break

A Page Break will appear as a small black mark to the left of your Report.

Sub Report

Add a sub Report to a Standard Report

You can include more than 1 sub report into a ‘Standard’ report.

To insert a sub report into a ‘Standard’ report:

Steps:

1. Create the sub report
2. Save the sub report
3. Create the ‘Standard’ report
4. Insert sub report in ‘Standard’ report.
5. Save ‘main’ report.

NOTE!!! Sub Reports cannot be placed on Report Templates.

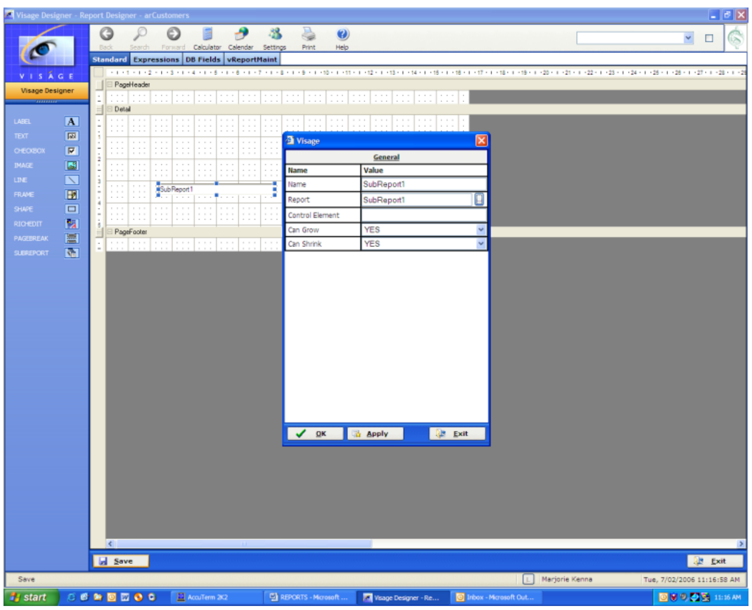


Figure 51: Add sub report to ‘main’ report

Insert sub Report into ‘Standard’ report

Steps:

1. Open a ‘Standard’ report
2. Drag the Standard Element – Sub Report to the canvas section of your ‘Standard’ ’ report
3. With Sub Report Element Highlighted, right click and select Properties

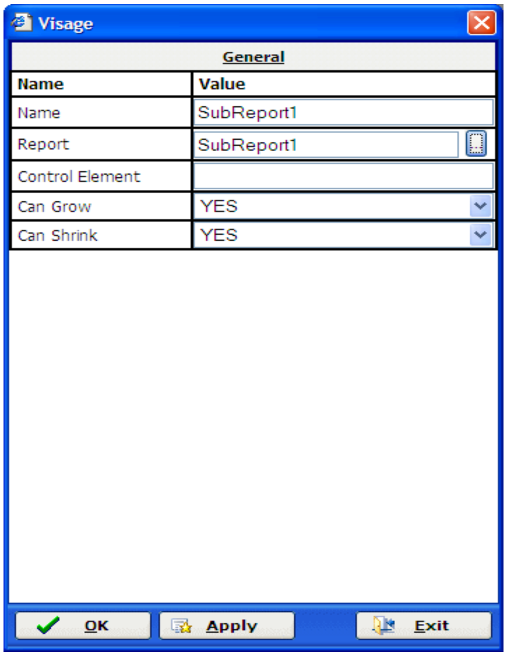


Figure 52: Sub Report General Properties

4. Select the ellipse (…) button for the Report Selection. You will then be presented with the Report Search Screen, where you can select your Sub Report to insert into this 'Standard' report.

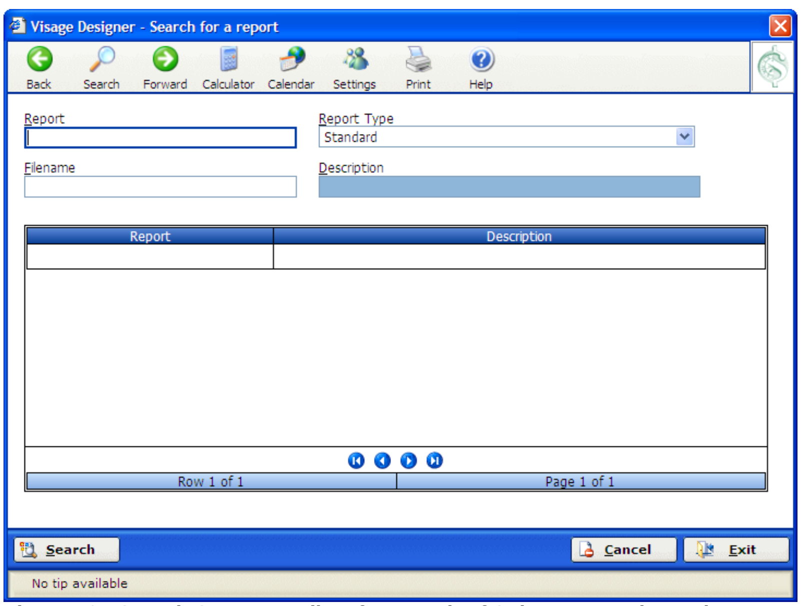


Figure 53: Search Screen to allow for search of Sub Report to insert into Report.

All available reports will be displayed or alternatively select Search Button to locate available reports. You can then select a report to be inserted as a sub report into your 'Standard' report.

DB Fields Tab

This Tab will display all Data Base Fields belonging to the file you entered on the initial screen of the Report Designer.

If you click on the DB Fields Tab/Button, the Data Base Fields will display on the left of your Report Maintenance Screen as follows (where the Standard Elements were displayed previously)

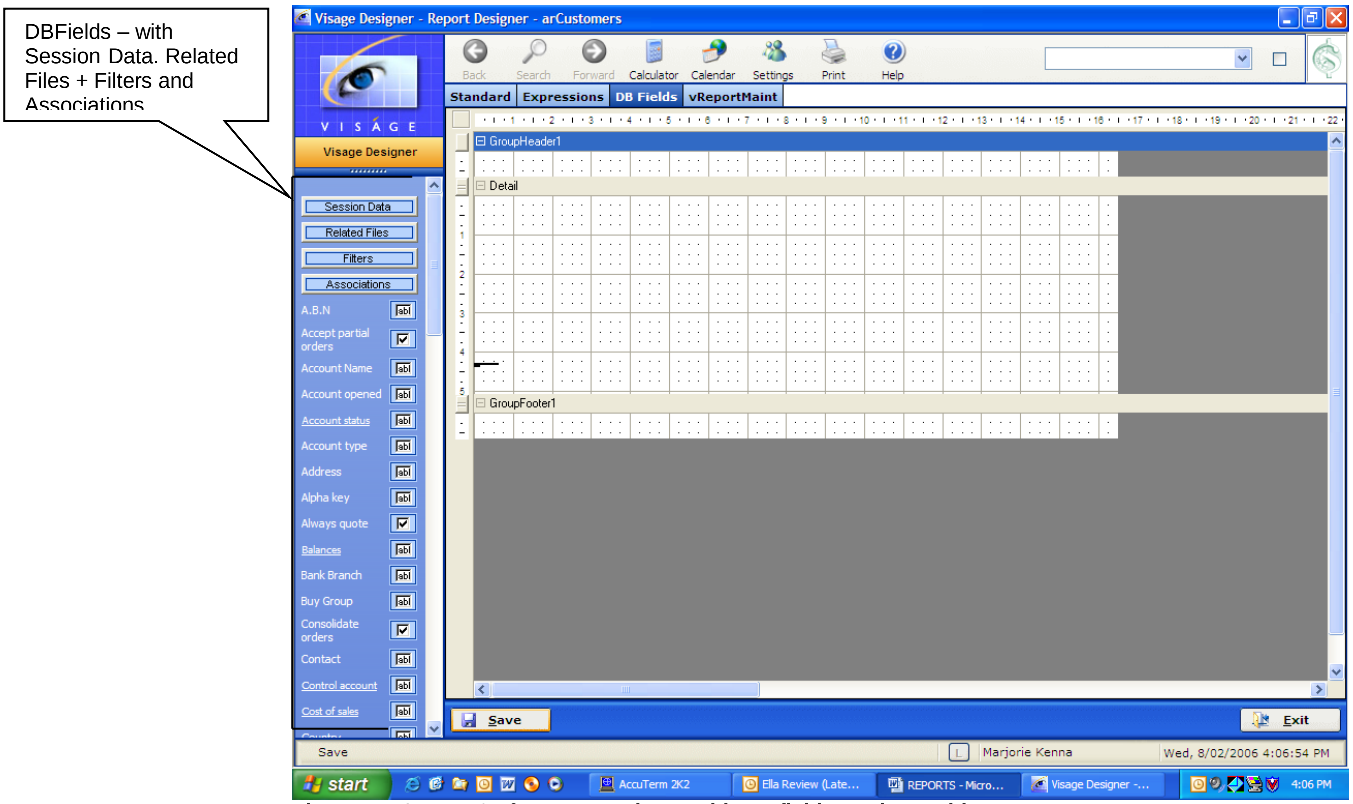


Figure 54: Screen 2 of Report Designer with DB fields ready to add to Report

You will notice a number of other buttons displaying at the top of the DB Fields eg. Session Data, Related Files, Filters and Associations. Some or all of these buttons may or may not appear. The buttons available will depend on the file you have selected on which you are basing your report. If they all do not appear, do not be concerned as it simply means that the file you are basing your report on does not have any related files, or Filters or Associations.

Add a DB field to your report

Now that you have set up your report with paper size, margins, labels to be added to sections, added additional bands of either Group Header/Footers, Report Header/Footers if required you are now ready to add DB Fields to your report.

Steps:

1. Move mouse pointer over required field icon until the pointer changes from an Arrow to a Hand.

   Select the required field icon/image (same as you did when adding Standard Elements to your report) and drag and drop to required location on your report.

2. Position on the canvas/screen. Continue dragging and dropping fields onto your report as required.

You will notice that some Data Base fields in the file are underlined.

This means that those fields give you access to information in other files. If you left click on the item that is underlined, you will see the additional information that can be added to your current report. You can then drag and drop those fields from the current file onto your report if required.

To return to the original file, left click on the up arrow located at the top left of screen

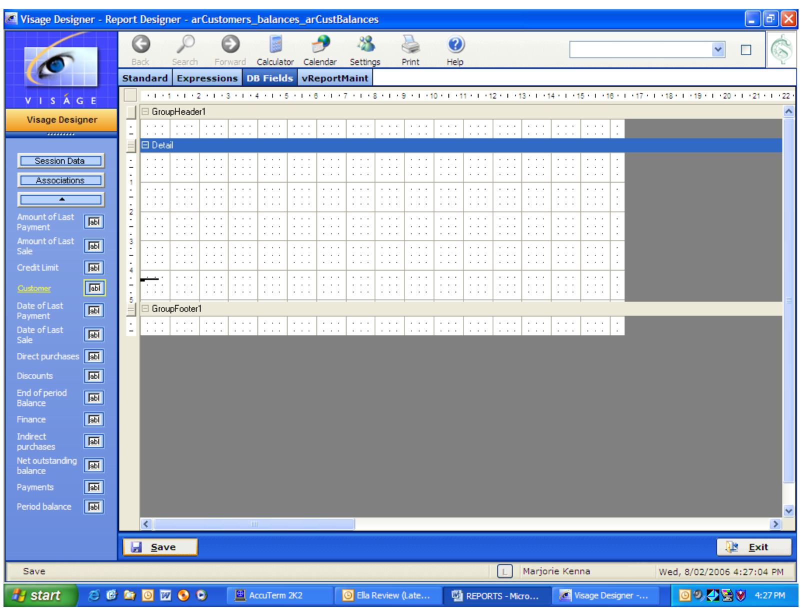


Figure 55: Blank Canvas to add DB Fields for your report.

Fields indicated with yellow font are the key fields for that file.

Continue dragging and dropping DB Fields onto your report until you have added the required fields for your report.

DB Fields Properties

Each field you add to your report will contain Properties. To view the properties for each field:

Steps:

1. Position cursor over field until pointer changes from Arrow to Hand. Left click mouse button.
2. Select Properties. The properties will look something like Figure 59. You can change any of these properties if required by selecting available options from the drop down list, or alternatively leave setting as default.

General:

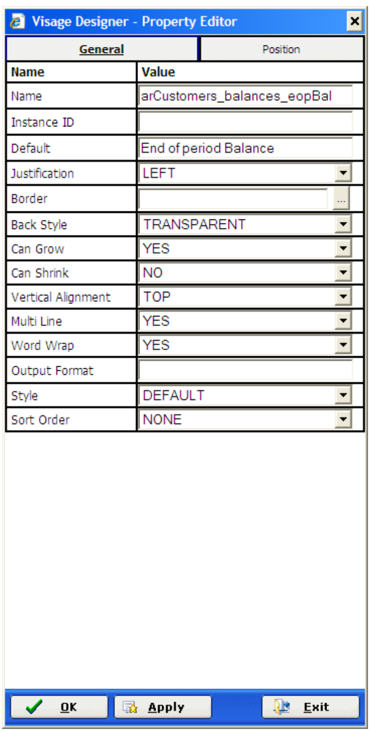


Figure 56: General Properties of DBField from the arCustomers File

- **Name:** Is the field name and the file name. You cannot change this.

- **Instance ID:** If you want to include this field more than once in your report, you will need to set up this field with an instance ID. This is simply something to distinguish between the same fields located in more than one location on this report. eg. top, header, detail etc.. If you are only referencing this field once on this report you can leave the Instance ID field blank.

- **Default:** This is the default text information that will appear on your report designer when this field is referenced.

- **Justification:** By default the justification for this field is set to left, if you wish to change this make your selection from the drop down list.

- **Border:** By default there is no border set for this field. If you want to set this field with a border, simply select the ellipse (…) button to the right of this selection and make your desired selection. If you do not require a border, simply leave this field blank.

- **Back Style:** This is a predefined style that has been set up in Viság e. Leave blank if you do not require any changes.

- **Can Grow:** If the data contained in this field might be greater than the size of the field shown on your report, Select Y to can grow. If the data is only small and you have sized this field sufficiently on your report, than you can set this field to N. Can Grow will only grow vertically.

- **Can Shrink:** This is used in conjunction with the Can Grow option. If you have sized the element on your report to contain a great deal of data, but the field might only contain a small amount of data, if you set this option to Can shrink any additional space will be removed.

- **Vertical Alignment:** You have options of Top, Middle or Bottom for the vertical alignment of this field.

- **Multi Line:** If the Data contained in this field might extend over multi lines, do you want to display the multi lines on the report? – If so set this option to Yes, otherwise it will simply truncate the text of this field to only display one line.

- **Word Wrap:** This field is used in conjunction with Multi Line and operates if data in this field is likely to extend over the size of the field set in the report. If you drop a field onto a report where the data is too wide for the field, and you have Word Wrap turned off, the data will be truncated. If you have Word Wrap turned on the text will simply wrap and the entire text will be printed.

- **Output Format:** If you wish to format the data contained in this field in a particular manner, set the format here. If no formatting is required, leave this field blank. e.g. This field contains numbers you want to format the output to appear as $x,xxx.00. In this example you would enter the output format as $x,x0.00

- **Style:** Make your selection from the drop down list to change the Style.

- **Sort Order:** This is used if you wish to set a sort order by this field for your report. Options are Ascending or Descending. If you do not wish to sort your report by this field, leave it set to the default of none.

Position:

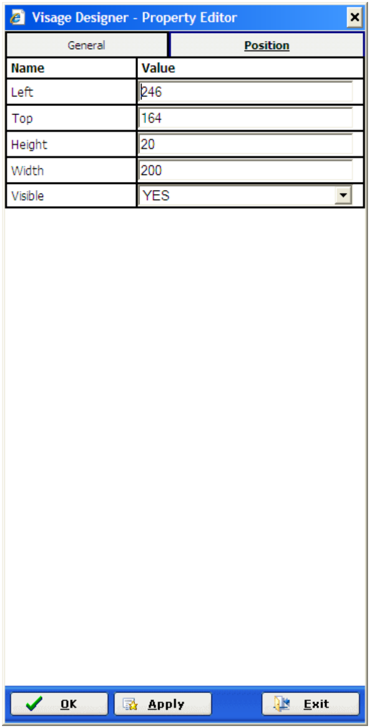


Figure 57: Position Properties Tab of DBField from the arCustomers File

Position Properties:

- **Left**: The element's x-coordinate representing its location on the canvas. The coordinate is based on the left edge of the element.

- **Top**: The element's y-coordinate representing its location on the canvas. The coordinate is based on the top edge of the element.

- **Width**: The width of the element in terms of pixels.

- **Height**: The height of the element in terms of pixels.

- **Visible**: Setting this option to 'No' allows the element to exist on the canvas, but not be visible at run time.

Session Data

The Session Data button will give you additional fields that you may find useful to include on your report.

Figure 58: Session Data elements available to add to your report

Add Session Data elements to your Report

Steps:

1. Left click with mouse on Session Data Button/Tab.
2. Available Session Data elements will then be visible.
3. Position cursor over image/icon to the right of the field name. Mouse pointer will change from an arrow to a hand.
4. Left click with mouse and drag element to your report. Position as required on your report.

After you have completed your Report setup, Click the Save Button.

Each Field has various properties. After you have dragged and dropped the required field on to your report, right click, Select Properties – adjust the properties as required.

Expressions Tab

Expressions are ….

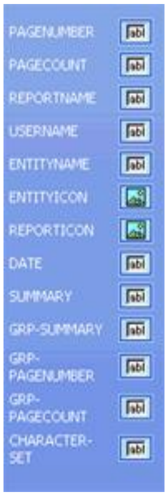


Figure 59: Expressions Options available to add to your Report

Add Expression Tab Elements to your Report

Steps:

1. Left click with mouse on Expressions button
2. Available Expression elements will then be visible on left side of screen.
3. Position cursor over image/icon to the right of the field name. Mouse pointer will change from an arrow to a hand.
4. Left click with mouse and drag element to your report. Position as required on your report.

After you have completed your Report setup, Click Save Button.

- **PageNumber** – Will add the page number of the report
- **PageCount** – Will add the total number of pages in the report
- **ReportName** – Will add the name of the process where this report originated
- **UserName** – Will add the name of the user currently logged on
- **EntityName** – Will add the name of the current entity where the user is logged onto
- **EntityIcon** – Will add the image set up for this Entity in the Entity Maintenance section of Viságe. If no image has been set in the Entity Maintenance section, this will have no affect.
- **ReportIcon** – Will add the image set up for Reports that has been set in the Entity Maintenance section of Viságe. If no image has been set in the Entity Maintenance section, this will have no affect.
- **Date** – Will add the current date
- **Summary** – Will add the Grand Total for the nominated field to the report.
- **Grp-Sumary** – Will add the Sub Total for the nominated field to the report.
- **Grp-PageNumber** – If you have your report set up by Groups. This will add the current page number in the report for that Group.

- **Grp-PageCount** – If you have your report set up for Groups, this will add the total number of pages in the report for that group.
- **Character-Set** – Will add a printer character set to the report.

Each expression element has various General and Position Properties associated with it. To view the properties for each expression, right click with the mouse, Select Properties and then left click. You can then view and/or make any changes as necessary.

After you have made the changes, click the ok button to return to the Report.

NOTE!!! Adding elements from the Expressions Category to your report will only display the information eg. Page Number. If you wish to add a label to this field to identify that this is actually the page number you should add a Label from the Standard Category.

Search for a Report

Report Name

If you wish to view an existing Report, you can enter the report name in Report field selection, and press <enter>. The Report details will then display on screen. You can then amend the report as required.

If you do not know the exact Report Name, you can use the Search functions to locate the report.

Steps:

1. Click on the Search button at the top of the screen.

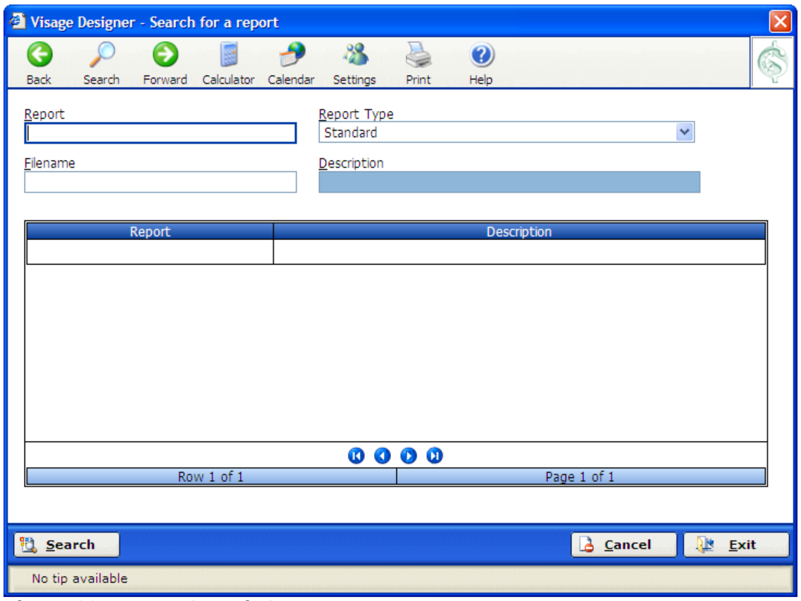


Figure 60: Report Search Screen

To display ALL Standard Reports

a) Leave Report Field Blank.
b) Select Standard in Report Type Field.
c) Click on Search Button at the bottom of this screen.

To display ALL Template Reports

d) Leave Report Field Blank.
e) Select Template in Report Type Field.
f) Click on Search Button at the bottom of this screen.

To display ALL Subreports.

g) Leave Report Field Blank.
h) Select Subreport in Report Type Field.
i) Click on Search Button at the bottom of this screen.

All reports matching Search Criteria will then be displayed in Search Screen.

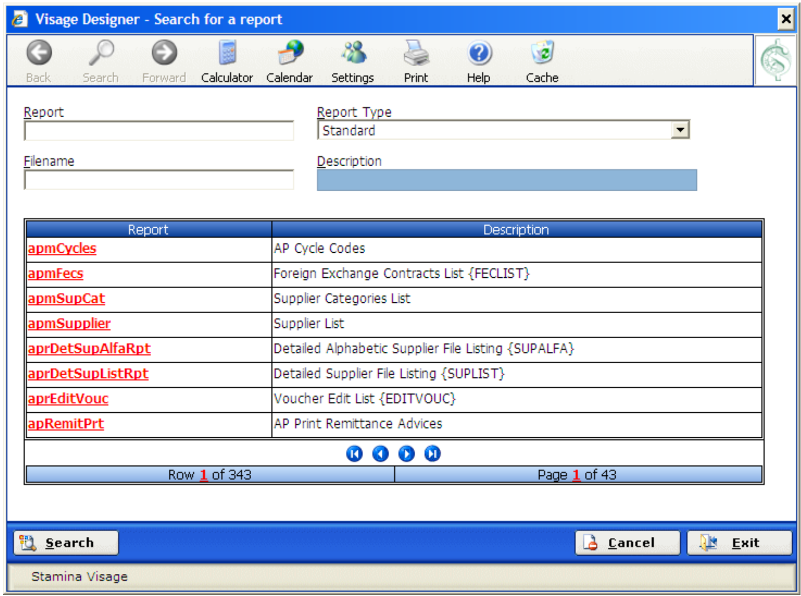


Figure 61: Search Screen displaying ALL Standard Reports

Navigate through this list to locate the required report by using the Navigation buttons.

2. Select report indicated with Red Text and a red underline, by left clicking with your mouse button. You can then view or amend this report as required.

Report Wildcard Characters

If you know part of the report name, you can utilise the wildcard characters in your search criteria.

These are [and]. The [says the report starts with anything.
The] says the report ends with anything.

Example:
The report name might be *arcustomerreport*. If you were not exactly sure of the spelling of the report name, to search for this report you could enter *[customer]* in the Report Name field, then click on Search. All reports that have the word customer in Report Name will be returned by the search.

Alternatively if you want to search for all reports that start with *ar*, you could enter *ar]* into the name field, then click Search.

Alternatively if you want to search for all reports that have *report* as the last text in the report name, you could enter *[report* into the name field, then click Search.

Create a Standard Report

Report Name

When creating a report, the first thing you need to do is to give your report a name. Using the standard we have developed we would name a customers report *arrCustomers.*

ar	–	Indicating the Accounts Receivable System
r	--	Indicating this is a report
Customers	–	Indicating the report will show details of customers.

You are free to set up your own standards for report names as you wish.

Design

This can be utilised if you have a base report and you want to create another report for a different entity using the base report.

If you have an existing arDocEnt (Document Invoice form) for Entity XYZ, and you want to use this existing report for Entity ABC –

- Enter the report name in Report field, eg. arDocEnt
- Enter the Entity Name in this field. eg. ABC
- Click on Design button and make the required changes. You can make as many changes as you require. Any changes will only be reflected in this report. The original report arDocEnt will remain unchanged.

If you do not wish to design reports for different Entities' you can leave this field blank.

Always use the same Entity Name in Report Design field for consistency and traceability throughout the system.

Description

This will be a more meaningful name that will describe this report in more detail.

Report Type

You have a number of options available. Select the appropriate option for the report you wish to create.

Choices are:

- Standard
- Template
- Sub-Report

Template

If you wish to utilise a Template in your report, make your selection from the list of Templates available from the drop down menu.

If you do not wish to use a Template in your report, simply leave this field blank.

Delivery Type

Make your selection from the options available from the drop down list.

File Name

Enter the file name that you will be basing your report on. If you do not know the File Name, use the Search features to locate the name.

When creating a Report, after entering the file name and exiting this field, you will notice the field for File Name, is greyed out. This indicates that the file name is no longer changeable. This is because the file name is the starting point of the report and as such once entered cannot be changed. If you have made a mistake and entered the incorrect file name here, your only option is to delete the current report and create a new report using the correct file name.

Repeat

Indicates that elements part of the Controlling structure but not as deep as the controlling element in the detail section should be repeated.

Sort Dictionary Item / Sort by Table

At this stage of creating a report, you should leave this table blank.

The Sort By Table will be populated from the next screen - Report Design Screen. On the Report Design Screen, you will be adding elements/fields to your report. One option of each element/field is to Sort By. *See later in this document on setting the Sort Order.*

After the sort order has been set from the elements on Screen 2, if you wish to adjust the sort order, you can then use this Sort by Table.

Then click on the Design Button.

You will then be presented with a screen that looks like the following:

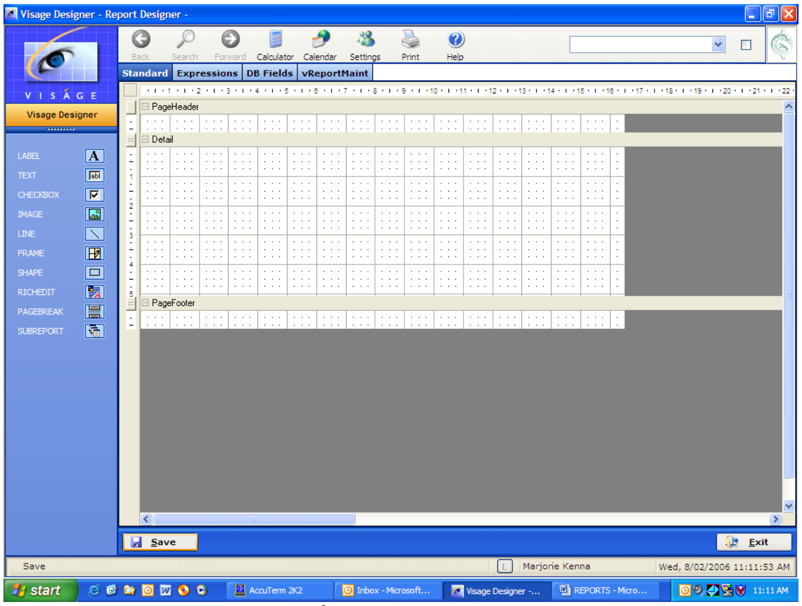


Figure 62: Screen 2 - Blank Viságe Reporter Screen ready to design your Report

The Report Design Screen is classified as a Banded Report Generator Screen, with a Page Header, Detail Section and a Page Footer Section.

The Tabs/Buttons for Standard, Expressions and DB Fields provide you with the options, elements and features to assist you in creating your report.

By Default, the Standard Tab will be highlighted. This Tab gives you access to the Standard Report Options that can be dragged and dropped onto your report.

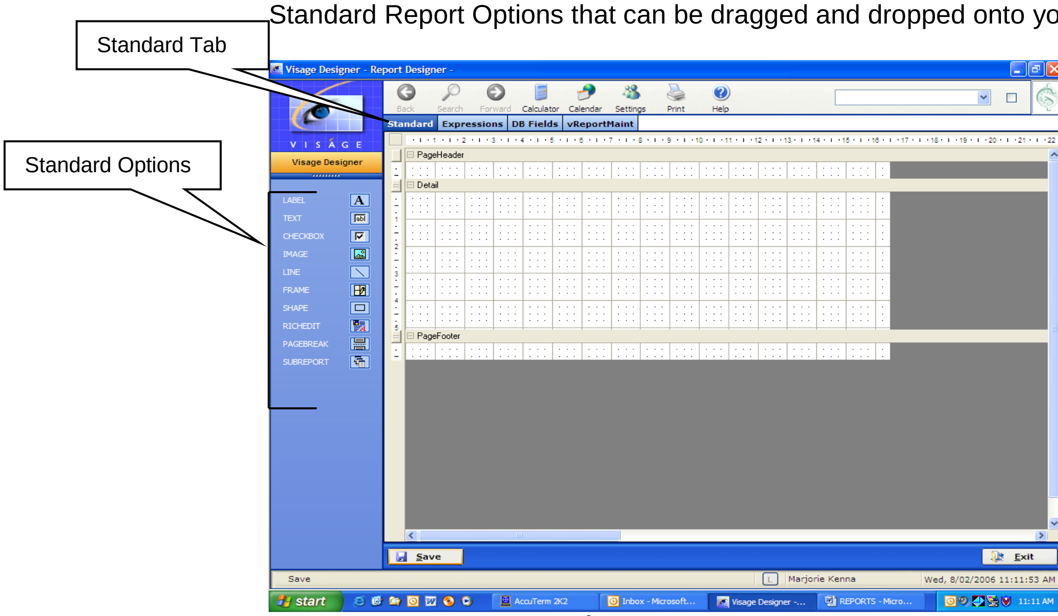


Figure 63: Screen 2 - Blank Viságe Reporter Screen

Add elements to Report Canvas

Drag and drop the Standard, DBFields and Expression Elements to the canvas section of Screen 2 and position as required.

Add additional Bands if required

Depending on the type of report you are creating, you may also need to add additional bands for Group Header/Footer or Report Header/Footer.

The following Report set up details are only recommendations. You are free to set up your report any way you wish.

The following Report setup might be followed for each report type as listed:

1. **Columns of entries with a column heading for each column (not grouped)**

   Page Header – containing details to print at the top of each page of the report. Might also contain labels for data bound elements that will be included in the Detail section of the report.
   Detail Section – to contain data bound elements that are being reported on.
   Page Footer – to contain anything required to print on the Page Footer for every page of this report.

2. **Columns of entries with a column heading for each column (grouped)**

   Same as above but with a GroupHeader/Footer band added

   Group Header – containing labels for data bound elements that will be included in the Detail section of the report. Section property of the report set up with Group By Element. You can only group elements that are included in the Details Section of the report.
   Group Footer – containing grouped by element together with Expression elements to total columns of figures that might included in detail section of the report.
   Report Footer – If required, might contain an Expression element to provide a Grand total for columns of figures included the report.

3. **Report to print individual Document / Invoices / Credits / Purchase Orders / Customer Orders etc.**

   Page Header – containing details to appear at the top of every page. This might consist of company name, company logo, address and contact details.
   Group Header – containing elements to appear at the top of every group. This might consist of Invoice to, Delivery To – customer name and address/contact details. Docket number and date etc, Set up with Group By element.
   Detail Section – containing data bound elements that are being reported on. Eg. Product code, product description, qty, prices.
   Group Footer – containing details of Totals relevant to this report.
   Page Footer – containing details that will appear at bottom of each page. This could consist of Page number of Page Count. Eg. Page 1 of 2.

Save

Click on the Save Button to Save your Report.

Quick Steps to create a Standard Report

Steps:

1. Enter your Report name and Description.
2. Select Report Type: Standard
3. Set the Template option to - No Selection.
4. Set Delivery Type to - No Selection.
5. Enter the File Name on which you wish to use to base your Report.
6. Click on the Design button located bottom left of screen.
7. Add in additional bands if required. Set up Report to add labels to required section.
8. Drag and drop the Standard, DB Fields and Expression Elements to your report and position as required.
9. Click the Save Button to save your Report.

Create a Report Template

A Report Template might be created and used where you have a number of reports in the system that would contain similar information. eg. Report Headings, Company Name details, Company Address details, Report Name, Time Report was created, User name who requested report etc..etc.

A Report Template will form the basis of Standard Reports that might contain similar information, eliminating the need to duplicate setup information on reports.

If you make a change to a Report Template, ALL reports based on the template will be changed automatically.

Steps:

1. Enter your Report name and Description.
2. Select Template for the Report Type

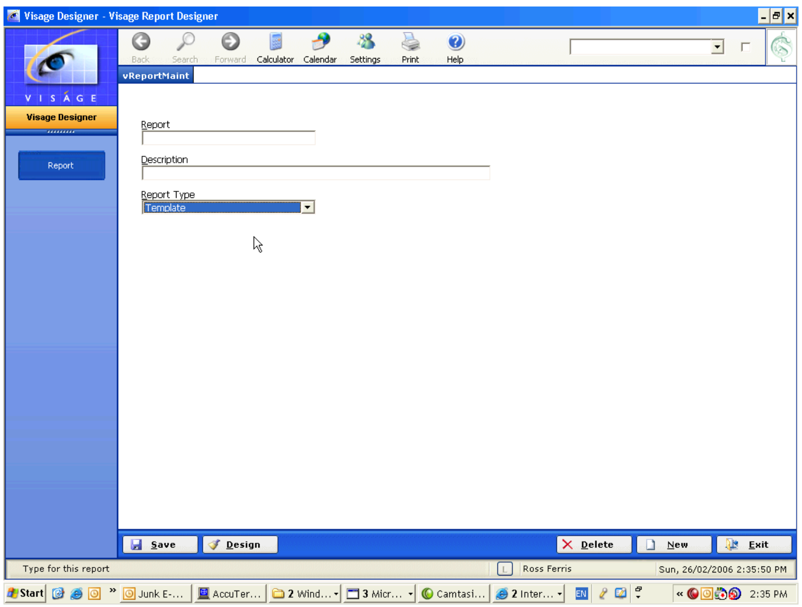


Figure 64: Create a Report Template

Notice that the fields!! – Template, Delivery Type, Sort Table and File Name disappear. This is because they are not required for a Template.

3. Click on the Design button located bottom left of screen.
4. Drag and drop the Standard, DB Fields and Expression Elements to your report and position as required.
5. Click the Save button to save your Report

Base Standard Report on Report Template

After you have created a Report Template, you can then use this as a basis for any other Report in the system.

Steps:

1. Create your Standard Report name and description.
2. Select the Report type to be Standard.
3. In the Template Drop Down section, select the Template that you want to use as a basis for this report.

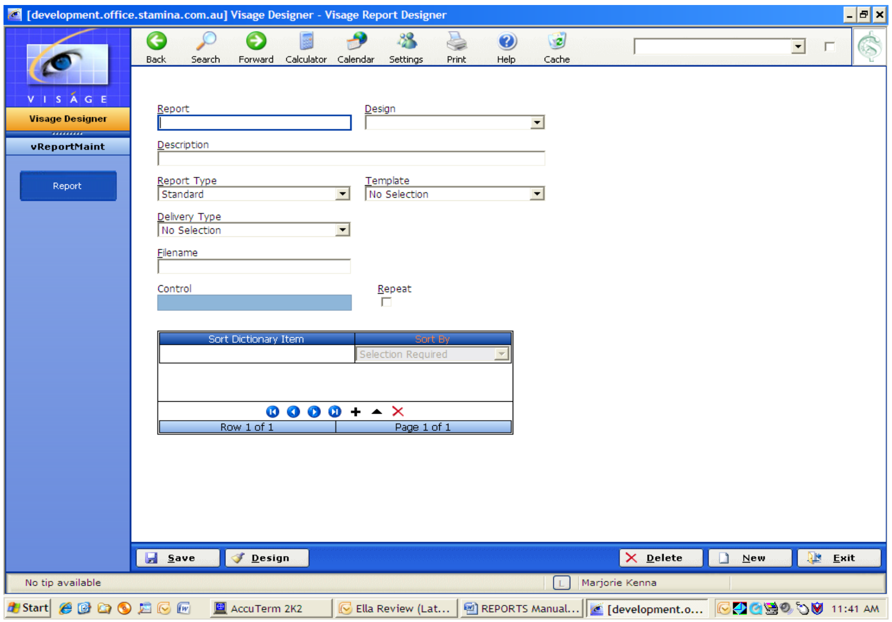


Figure 65: Create Standard Report using a Template

4. Leave the Delivery Type to- No Selection.
5. Enter the File name you wish to use for your Standard Report.
6. Click the Design Button located bottom left of screen. The details inherited from your Template will be visible on the next screen. Drag and Drop the items onto this screen.
7. Save your report.

You cannot change any thing on the Report Template from the Standard Report. All changes to the Report Template must be completed by viewing the Report Template and making the required adjustments. After the Template is saved, any or all changes made to the Template will be reflected in any or all reports that are based on that Template. You do not have to re-save any Standard Reports based on a template for the changes made in the template to take effect.

Create a Sub Report

To create a sub report,

Steps:
1. Create your Report Name and Description
2. Select Subreport from the Report Type Selection.

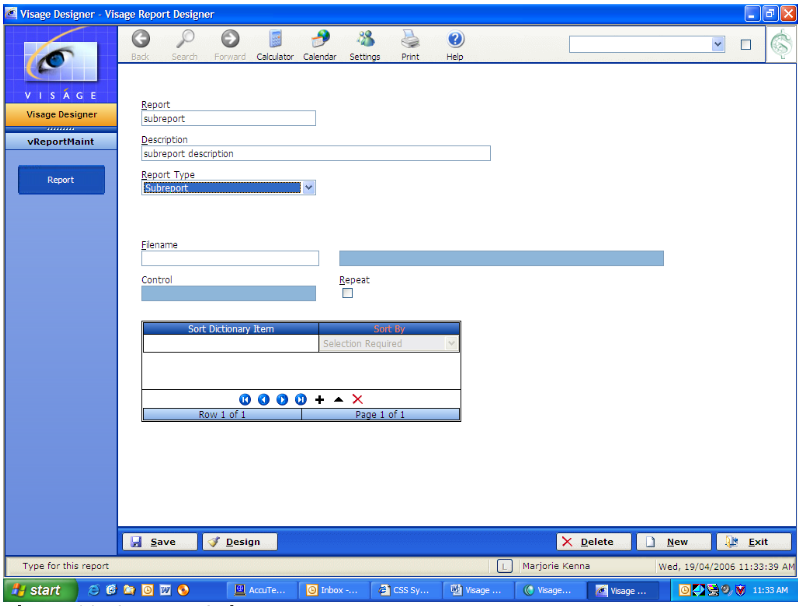


Figure 66: Create a Sub Report

3. Enter the File name you wish to use for your Standard Report
4. Click the Design button located bottom left of screen.
5. Drag and drop the items onto this screen.
6. Save your Report.

A sub report by default only shows the Details Section.

You can add a Report Header/Footer or a Group Header/Footer but you cannot add a Page Header to a sub report.

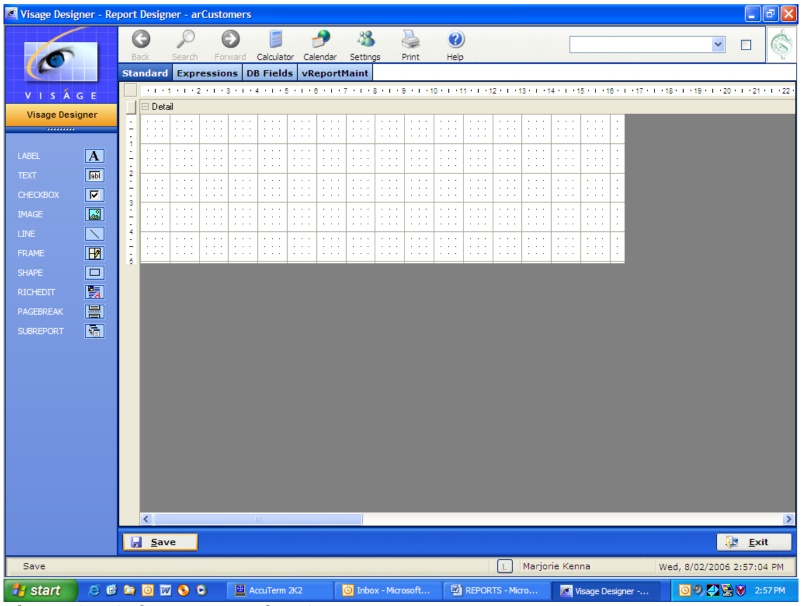


Figure 67: Sub report Design Screen

Setting the Sort order

This table will be populated when you set the sort order for individual elements on the Report Designer screen of your report.

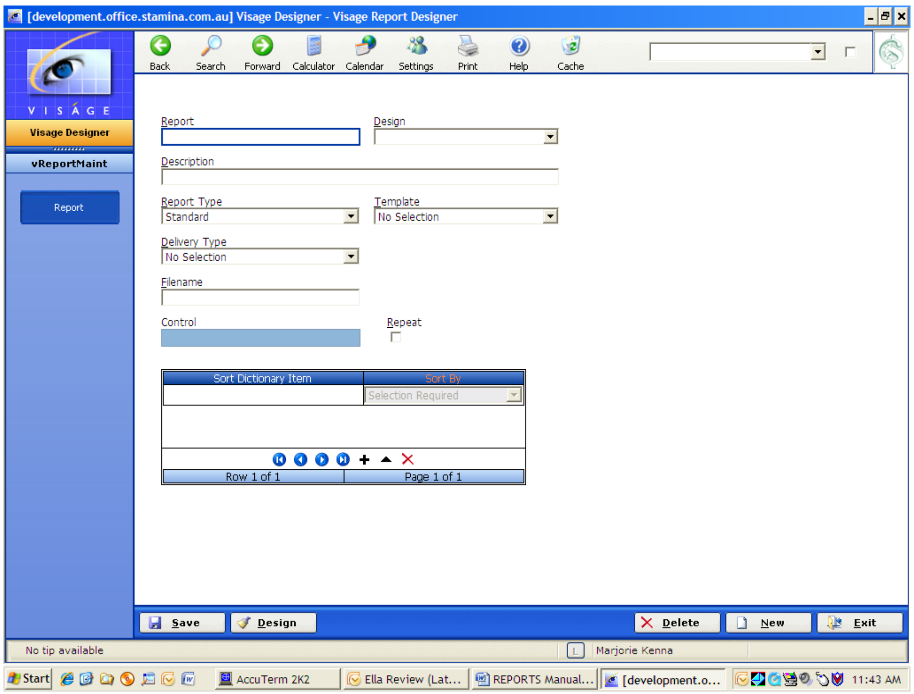


Figure 68: Report Design – Sort Dictionary Item

Example:

Set the sort order for this existing report to EmployeeCode.

Steps:

1. Highlight field to be sorted - EmployeeCode
2. Right click with Mouse.
3. Select Properties and left click with Mouse.

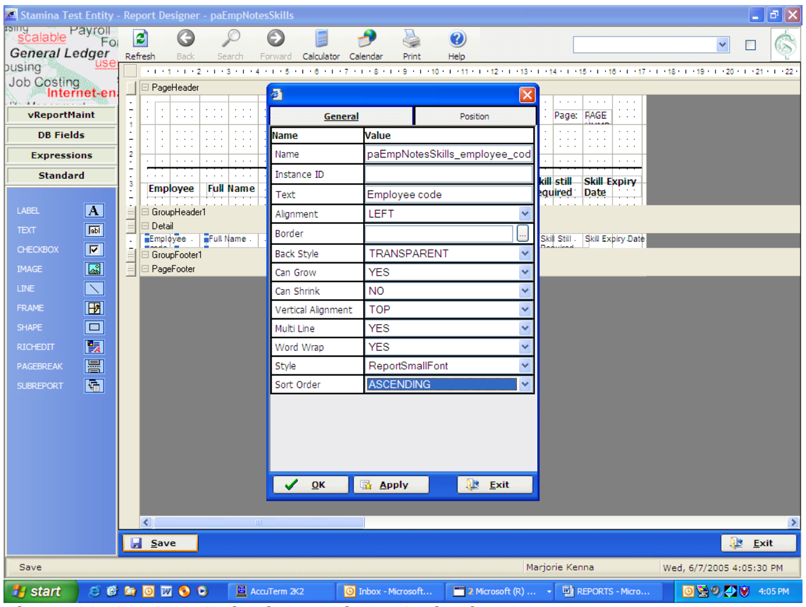


Figure 69: Set Sort Order for EmployeeCode element

4. Make your selection from the Drop down list of Sort Order – Ascending or Descending.
5. Click Save.

If you then navigate to the first screen of Report Designer, the Sort Dictionary Item Table will now contain the EmployeeCode element name.

Save all changes.

Changing Sort Order

If you have set up 2 Elements/Fields to sort in Ascending or Descending Order, but now instead of sorting by Field 1 then Field 2, you want to sort by Field 2 then Field 1, you can change the Sort Order by following these steps.

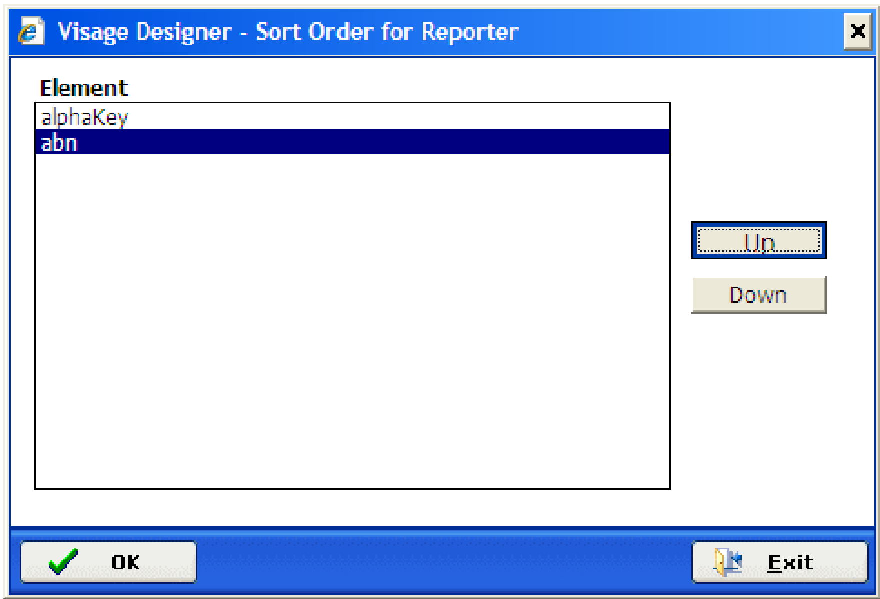


Figure 70: Report currently sorted by 2 elements.

Steps:

1. Position cursor anywhere on Screen 2 of Report Designer. Right Click with your mouse to see Reporter Properties – select Sort Order and a window similar to Figure 70: will appear where you can see the current elements that are included in the sort criteria.
2. Select an element and then click on the Up or down option from this Window to change the sort order.
3. Click ok.
4. The Sort Dictionary item table now reflects the changed sort order.

Report Example 1 – Journal Edit List

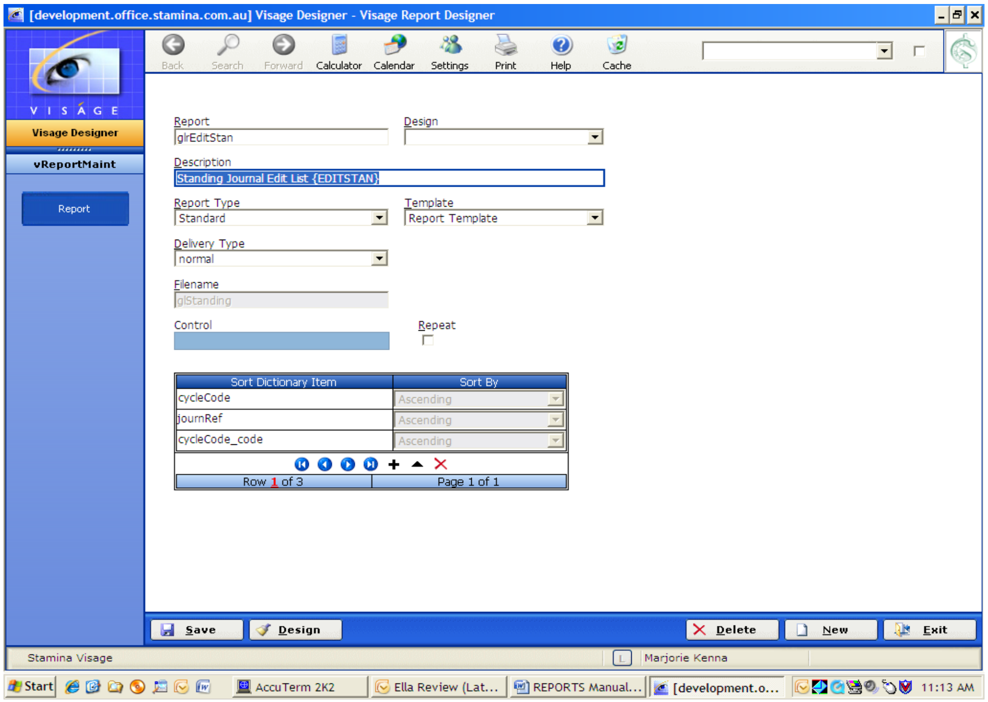


Figure 71: Example of Screen 1 - vReportMaint for glrEditStan Report

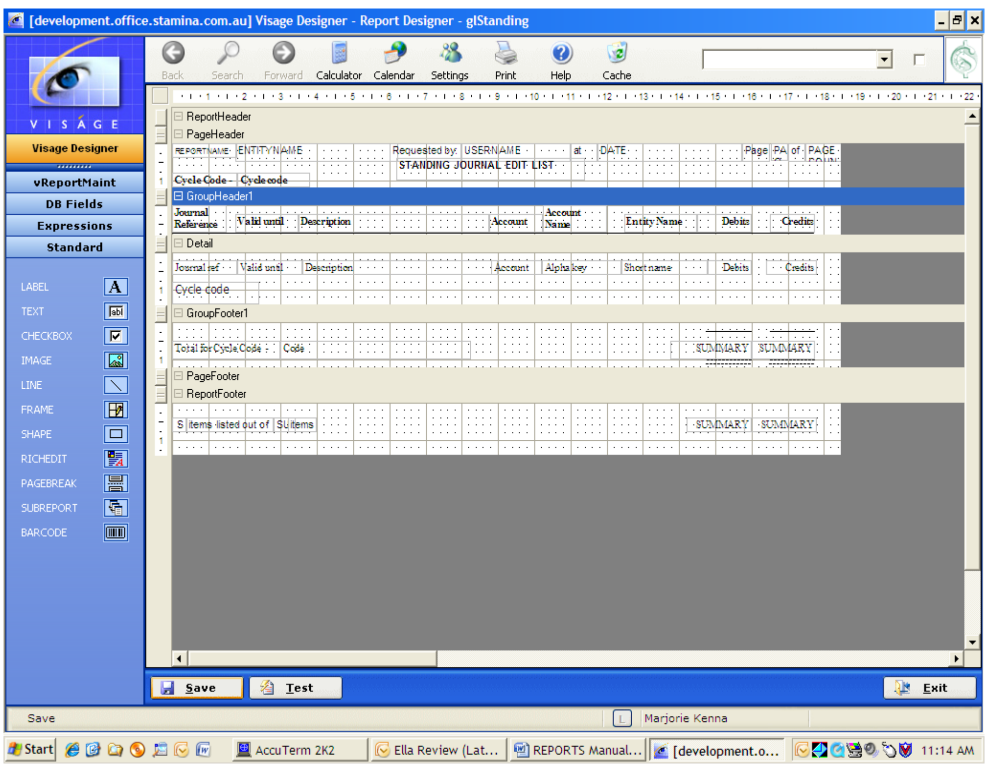


Figure 72: Example of Screen 2 - vReportMaint for glrEditStan Report

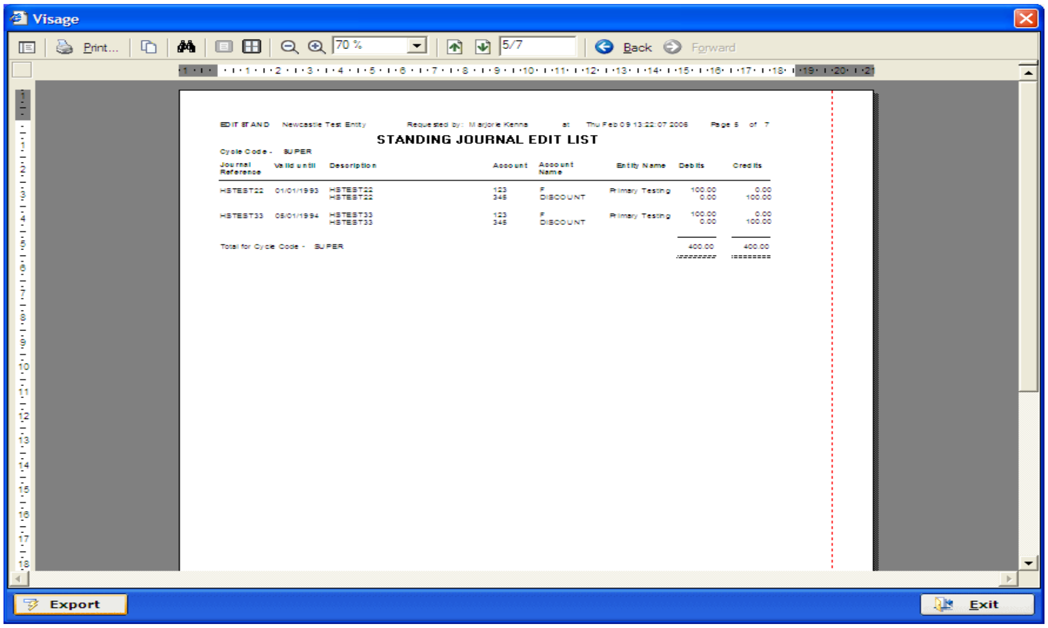


Figure 73: Report Generated from above vReportMaint Report.

For this report we have Report Name, Entity Name, Date and Time, Page Number and Report Title, plus column headings with rows of data under each column heading, then a total at the bottom of the report.

This report could be one page or could be many pages. The Headings will print on every page, the details will print on every page and the totals will only print at the end of the report.

Page Header

Because we have the same details appearing on all pages of this report, we have set this report to use a Report Template called – *Report Template*. This *Report Template* contains the details appearing on the top line of this report. We cannot make any changes to the *Report Template* from this report, but any changes made to *Report Template* directly will be immediately reflected in this report. Using the Report Template saves us time in having to add the same fields to this report.

Section Properties
Can Grow: Yes
Can Shrink: Yes

Group Header1

A Group Header is required because this report is grouped on General Ledger Cycle Code. We want all details relating to each General Ledger Cycle Code to be grouped together on our report.

Section Properties
Can Grow: Yes
Can Shrink: Yes
Grp Keep Together: Select First Detail.
Keep Together: No
New Page: After – when do you want a new page to be generated?
Repeat: - Set to Every Page to get the details appearing in the Group Header to print on every page.
GroupBy Element: Select the item for the Cycle Code, to group this report by Cycle Code.

Detail
As the name suggests this section contains the details of the report. This section can be one line or many pages. It should be set to Yes for can shrink and can grow. If you have allowed a small amount of space for this section on your report set up and the details for your report are many pages – those details will not display fully. They will display to fill the allowed space only.

Section Properties
Can Grow: Yes
Can Shrink: Yes

Group Footer 1
This section contains the totals for the item selected in the Group Header 1 eg. General Ledger Cycle Code, plus the details code and name for each General Ledger Cycle.

On this section we have added an Expression called Summary from the Expressions options available.

We want to total each Debit and Credit Amount to show a Total per General Ledger Cycle Code.

Summary Element Properties
Multi Line: Yes
Word Wrap: Yes
Element: Select the element you want to perform the calculations on. In our example we want to total the Debits and Credits. We would select the element for Debit and create another Summary Element set select the element for Credit.
Summary Distinct: No
Summary Function: Sum
Summary Running: Group
Summary Type: Sub Total

Section Properties
Can Grow: Yes
Can Shrink: Yes
Keep Together: Yes

Report Footer
Details in this section will print at the end of the report only. They will not print on every page. If you want something to print on the bottom of every page, you should add a Page Footer and set the details you want to print on every page in this section.

Section Properties
Can Grow: Yes
Can Shrink: Yes
Keep Together: Yes
Print at Bottom: No

Report Example 2 – AR Document

In this example we will be creating a Tax Invoice from the AR Document process.

Navigate to the Design Option -> Reports -> Reports in Visage

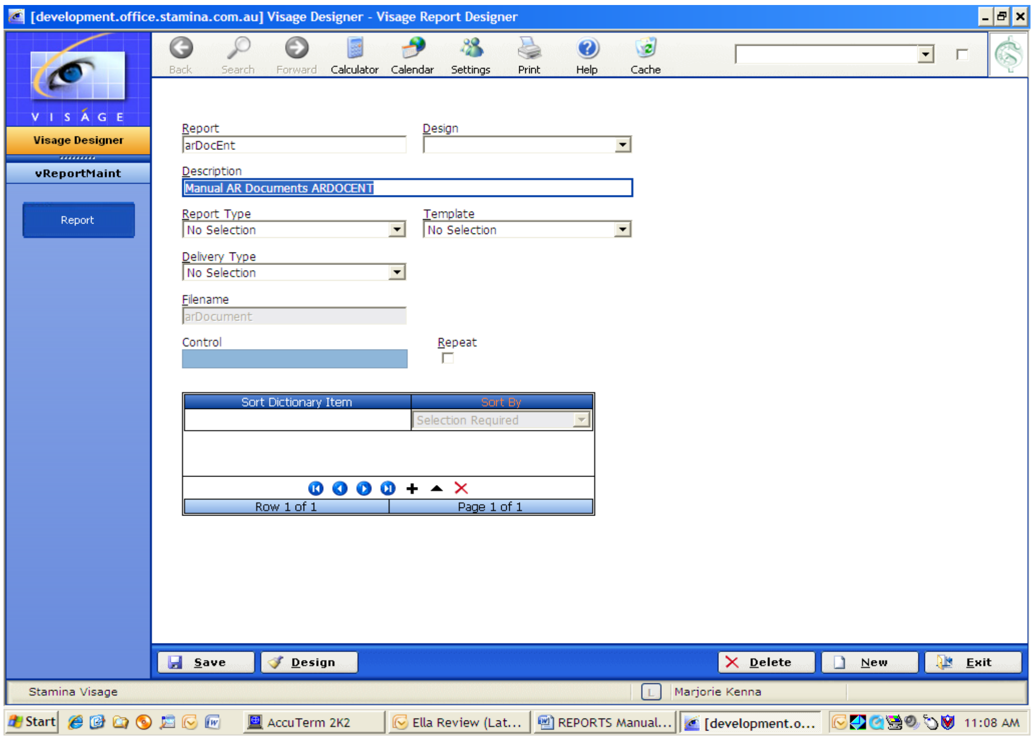


Figure 74: Screen 1 – vReportMaint for arDocEnt Report

1. **Report** – Enter a name for your report.

2. **Design** – Not used in this example so left blank. This field can be used if you have a base report that you want to modify for a new client. Eg. If you have a report but you want to change it slightly – you would enter the report name in the Report field, and then enter the client name in the Design field. When calling this report it would then be referenced as reportname$designname. Where if the report did not have a design name it would be referenced simply as reportname.

3. **Description** – Enter a meaningful description for the report

4. **Report Type** – Not used in this example so leave selection as No Selection.

5. **Template –** Not used in this example, so left blank here - BUT if you have similar details on a number of reports eg. Date, ReportName, Entity Name etc. that are repeated on each report, you could set up a template and reference the template as this point. This would save you time in setting up these same details each time a report is created. The Template details will then appear on Screen 2 of Report Designer. A Template can only be changed from the original template design. It cannot be adjusted from other reports that are using that template.

6. **Delivery Type –** Not used here, so left blank here

7. **Filename –** Enter file name to be used as basis of your report. In this example the file name is arDocument.

8. **Control –** Not set on our report. This gets set from next screen.

9. **Repeat -** Not set on our report.

10. **Sort Dictionary Item –** Table will be completed when items are selected from next screen.

Report Properties

Prior to commencing the design of your report, take some time to consider the layout/design of your report.

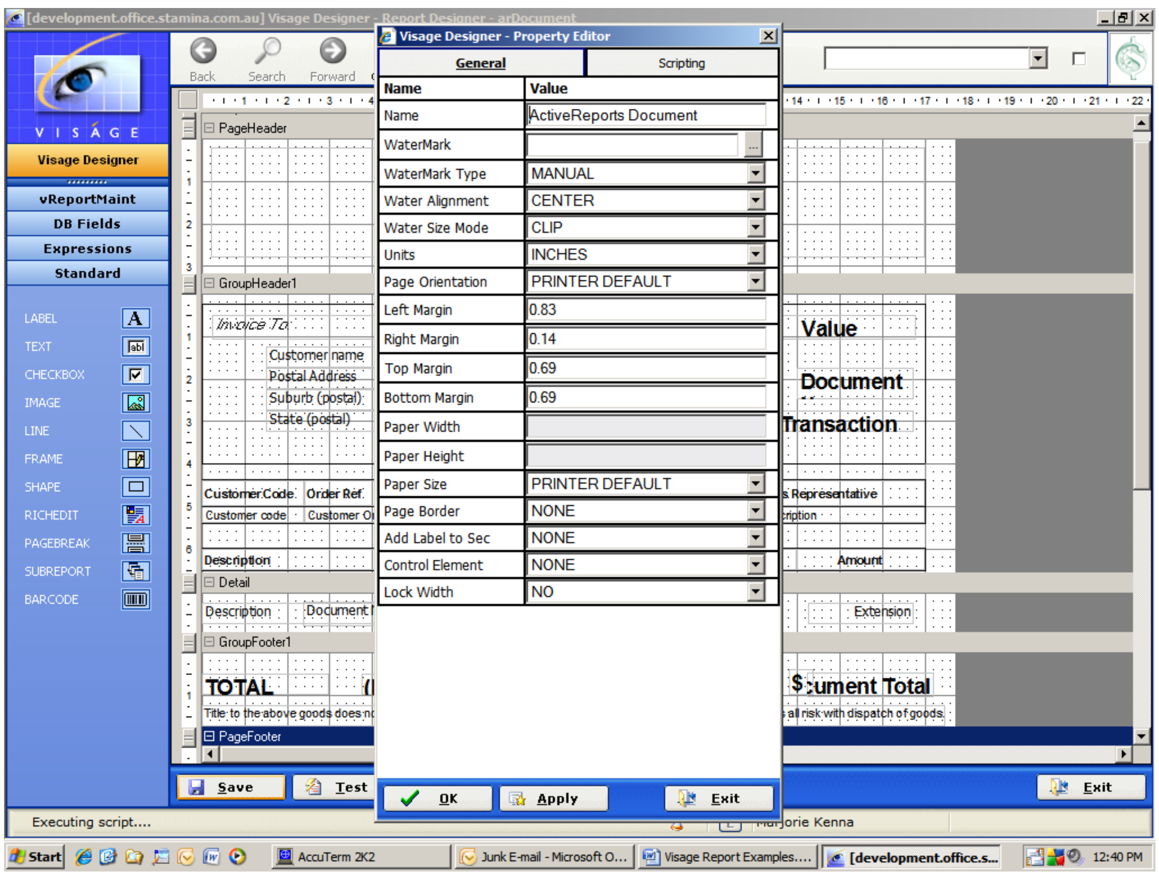


Figure 75: Report Properties for the Invoice/ AR Document Report

View Report Properties

- Position mouse in a vacant spot on Screen 2
- Click Mouse
- Select Properties

Page Details

- Set all page related options according to the paper size and layout of the report to be printed. Eg. Paper size, Border, Width, Orientation and Margins.

Add Label to Sec

- Select the section where you want the labels for the DB Fields to appear when you start dropping the DB fields onto your report.

  If you do not make this selection prior to dropping DB Fields onto your report, only the data portion of the field will appear. You would then have to add the Field Labels to your report by adding the Standard -> Label or Text element to the report for each DB Field.

Page Header

For our report this section contains a ReportIcon from the Expressions Tab. A Report Icon is an image file and is referenced in the Entity Profile for the relevant Entity under the Report Icon option. You must have previously captured the Icon via the Icon Capture option.

Add ReportIcon to Page Header

- Click Expression Button on Navigation Bar.
- Drag and drop ReportIcon to Page Header section of the report.
- Size and position as required.

Group Header1
A Group Header is required because this report is grouped on Document/Invoice Number.

We want all details relating to each Document/Invoice Number to be grouped together on our report.

Set options for GroupHeader1 as indicated in Figure 76.

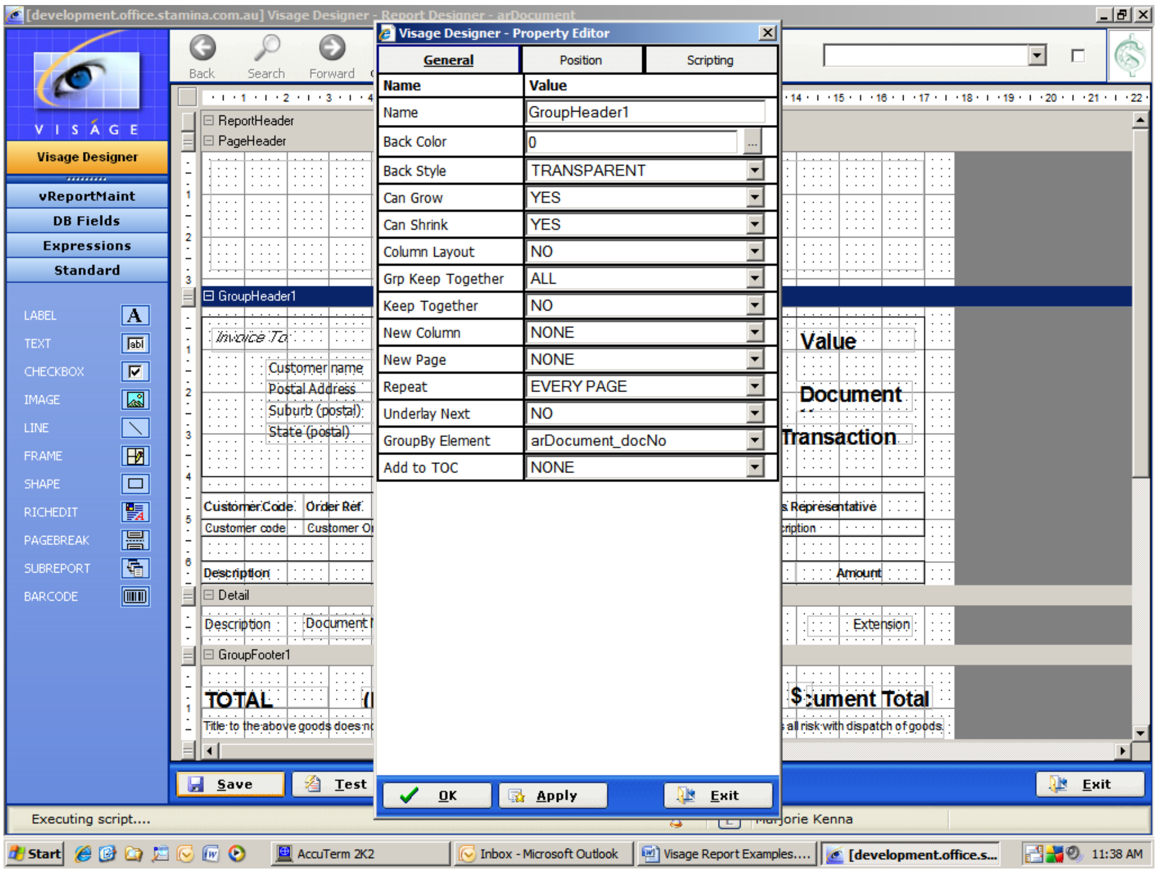


Figure 76: Section Properties of the Group Header1 of your report.

Detail

As the name suggests this section contains the details of the report. This section can be one line or many pages.

Set the options for this section as indicated in Figure 77 below.

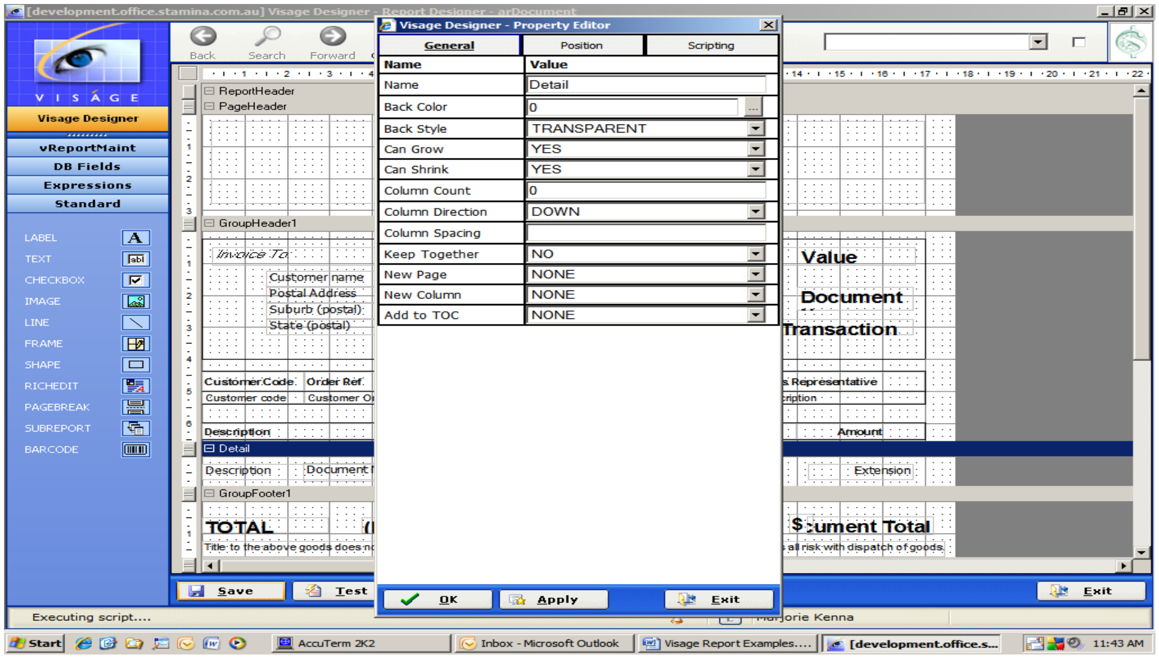


Figure 77: Section Properties for Detail section of your report

Group Footer 1

This section contains the totals for the Document/Invoice. Add the relevant fields to this section and set the Section Properties as indicated in Figure 78.

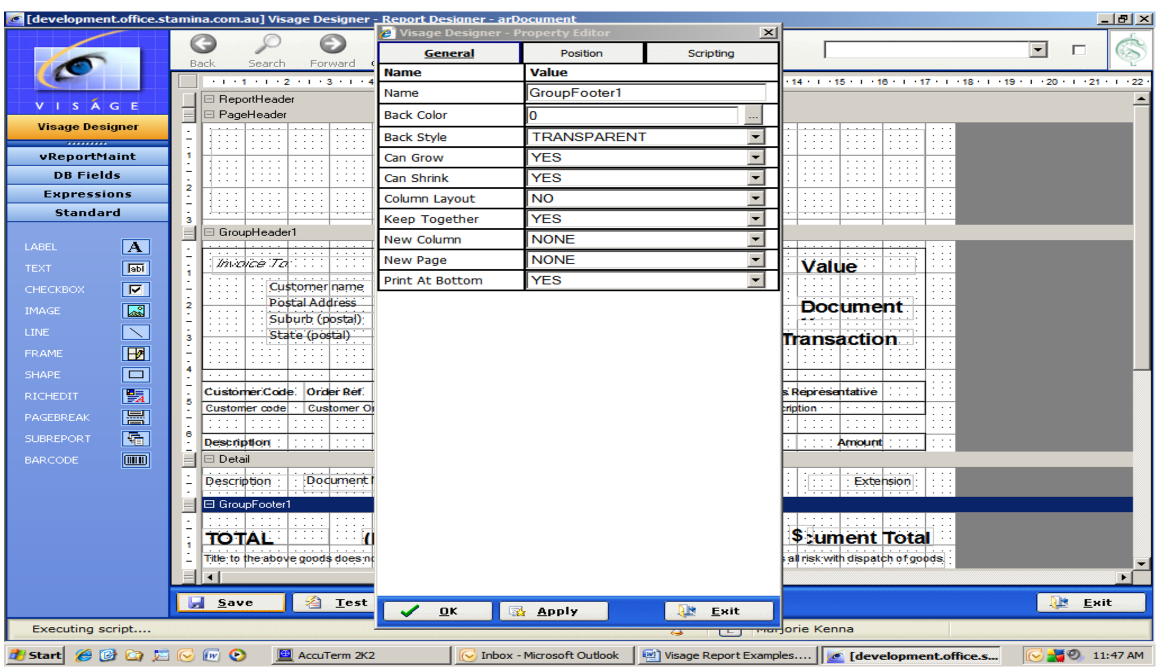


Figure 78: Section Properties for the GroupFooter1 section of your report

Page Footer
This section will print at the footer of each page of the report.

Set the options for this section as indicated in Figure 79.

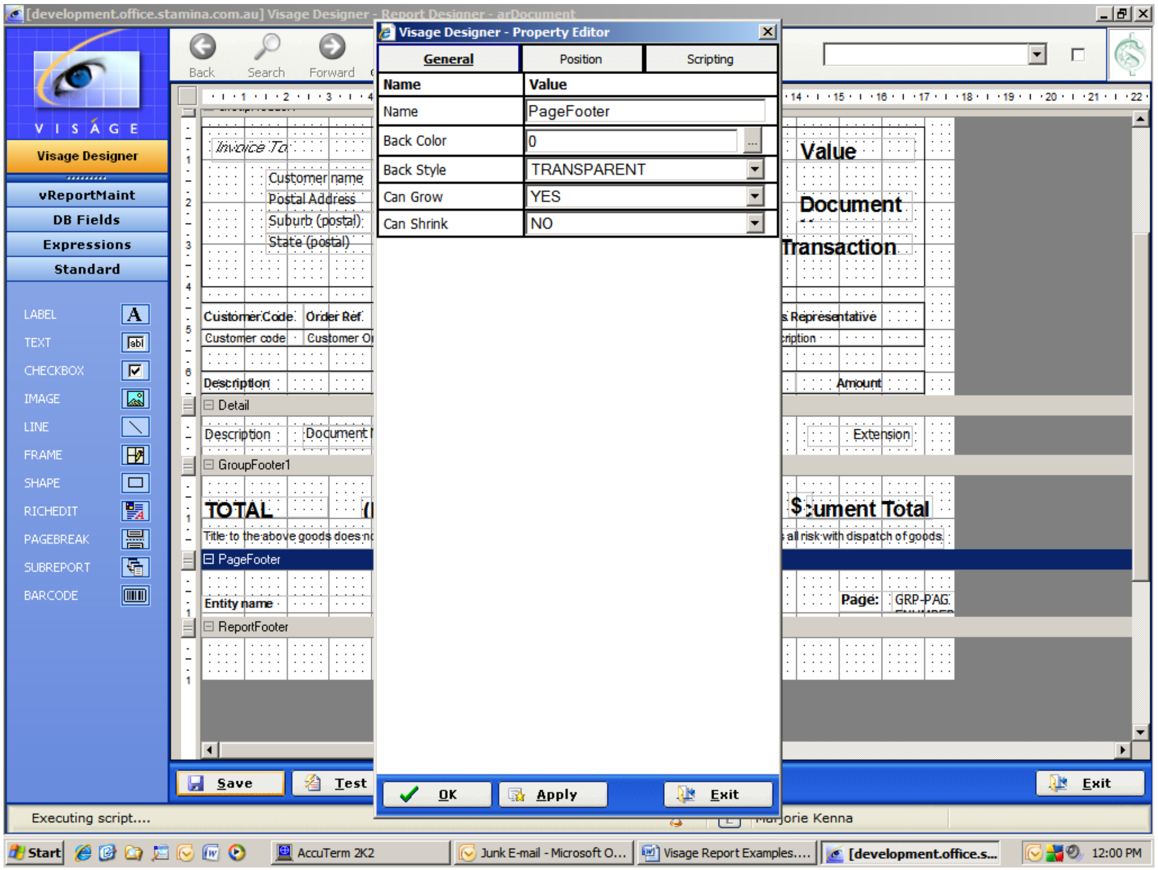


Figure 79: Section Properties for the PageFooter section of your report

REPORT OUTPUT

The below screen image will be how the Invoice will print to your designated printer.

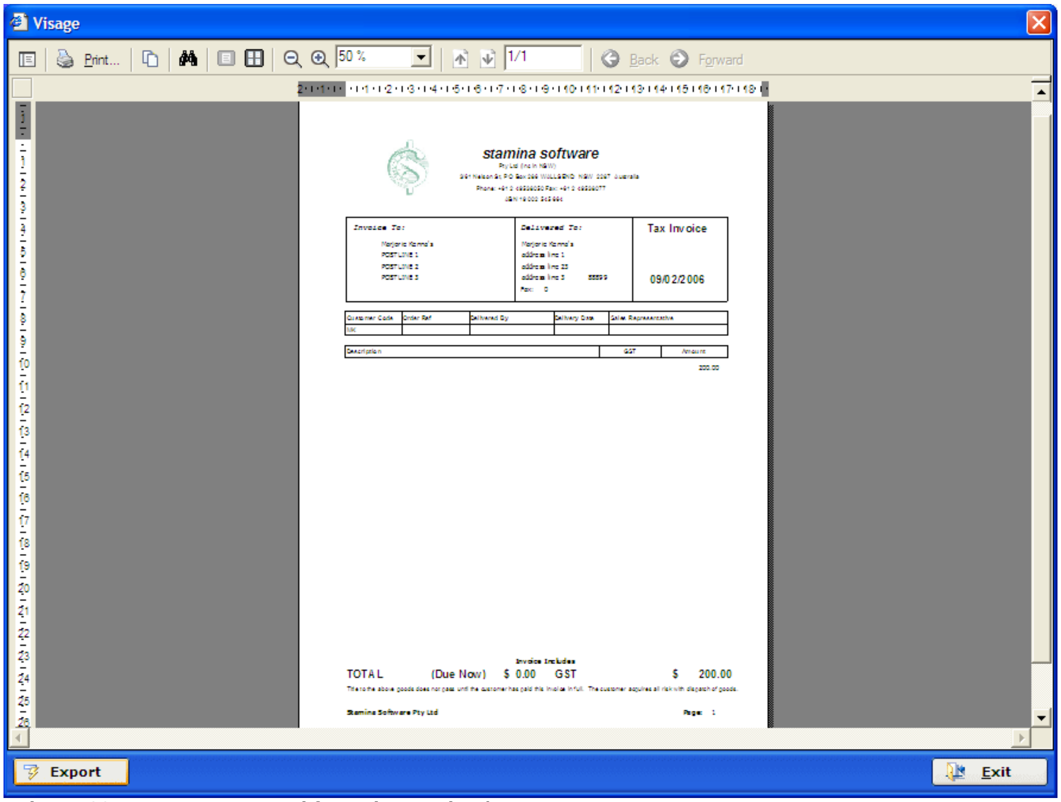


Figure 80: Report generated from the Invoice / AR Document Report

Report Example 3 – Purchase Order

In this example we will be creating a Purchase Order Report to print your Purchase Orders from the ORDERS Process.

Navigate to the Design Option -> Reports -> Reports in Viságe.

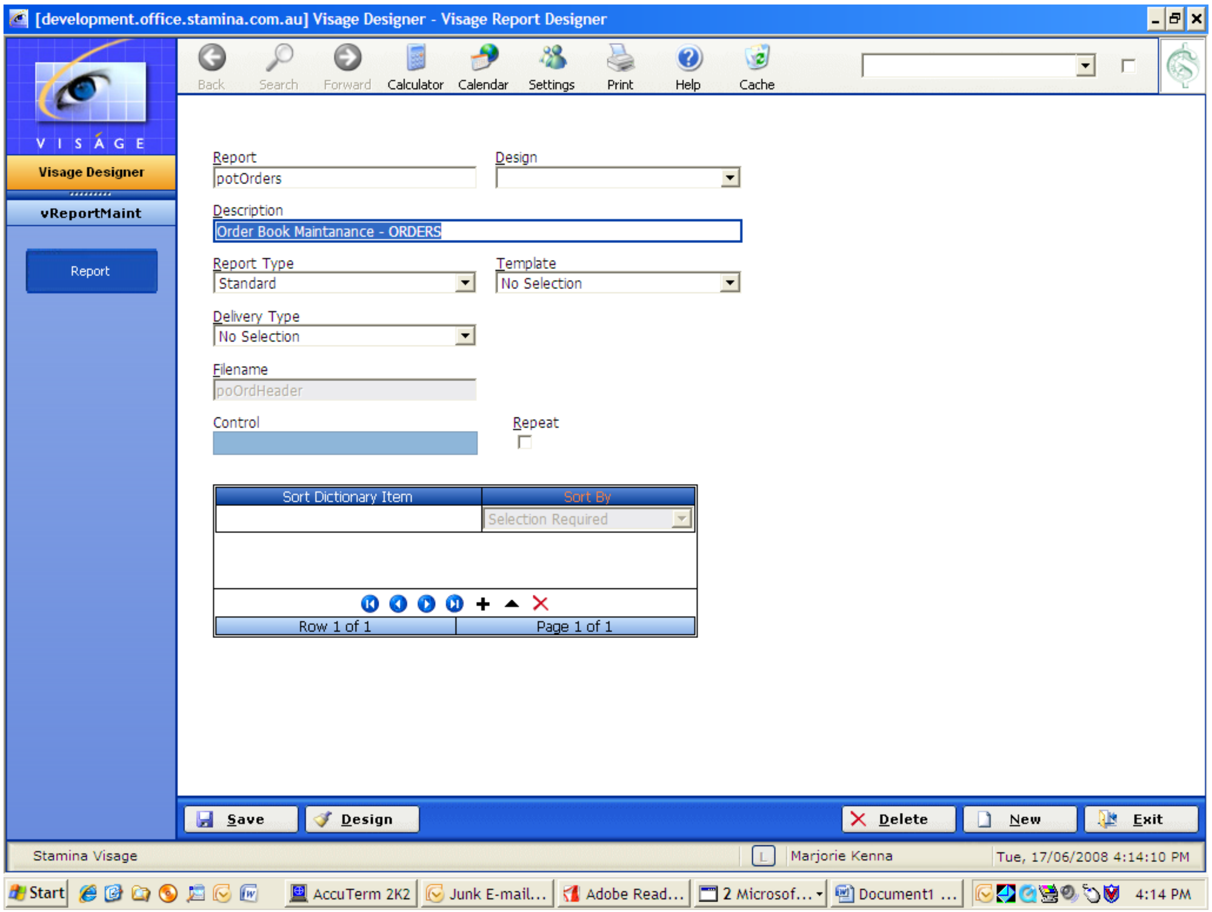


Figure 81: Screen 1 - vReportMaint for potOrders Report

1. **Report –** Enter a name for your report.

2. **Design** – Not used in this example so left blank. This field can be used if you have a base report that you want to modify for a new client. Eg. If you have a report but you want to change it slightly – you would enter the report name in the Report field, and then enter the client name in the Design field. When calling this report it would then be referenced as reportname$designname. Where if the report did not have a design name it would be referenced simply as reportname.

3. **Description -** Enter a meaningful description for the report.

4. **Report Type** – Select Standard.

5. **Template –** Not used in this example, so left blank here - BUT if you have similar details on a number of reports eg. Date, ReportName, Entity Name etc. that are repeated on each report, you could set up a template and reference the template as this point. This would save you time in

setting up these same details each time a report is created. The Template details will then appear on Screen 2 of Report Designer. A Template can only be changed from the original template design. It cannot be adjusted from other reports that are using that template.

6. **Delivery Type –** Not used here, so left blank here

7. **Filename –** Enter file name to be used as basis of your report. In this example the file name is poOrdHeader.

8. **Control –** Not set on our report. This gets set from next screen.

9. **Repeat -** Not set on our report.

10. **Sort Dictionary Item –** Table will be completed when items are selected from next screen.

Report Properties

Prior to commencing the design of your report, take some time to consider the layout/design of your report.

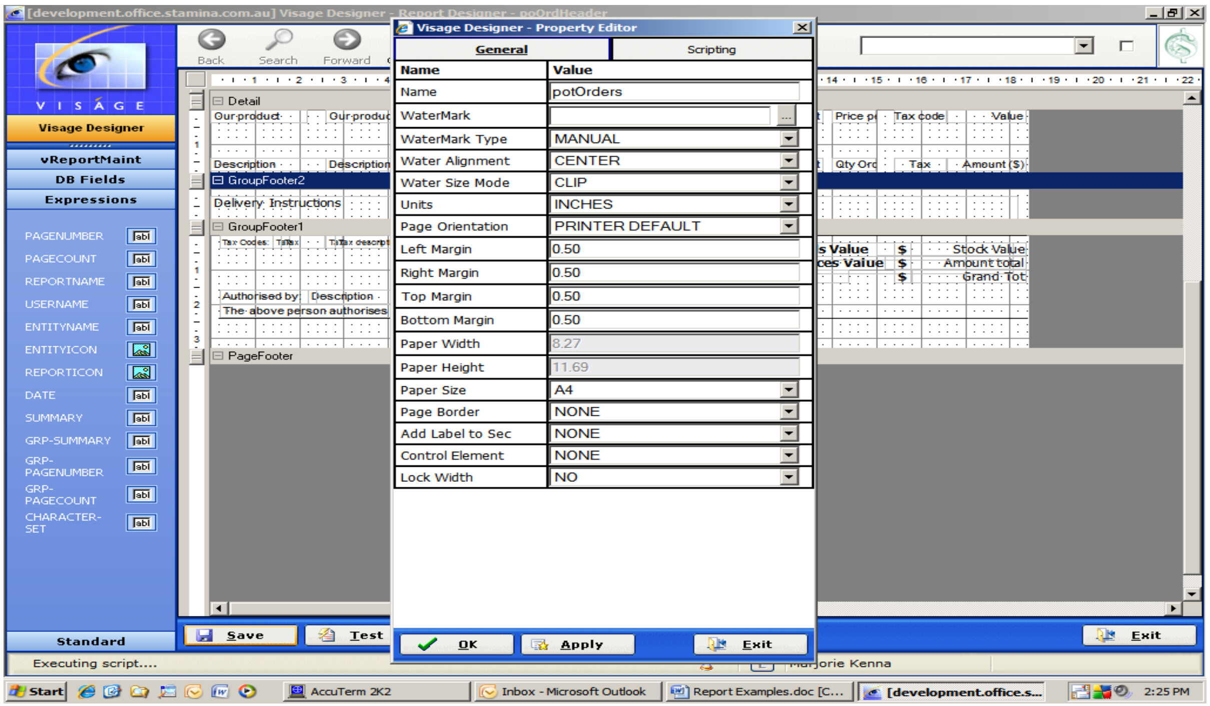


Figure 82: Report Properties

View Report Properties

- Position mouse in a vacant spot on Screen 2.
- Click Mouse
- Select Properties

Page Details:

- Set all page related options according to the paper size and layout of the report to be printed. Eg. Size, Border, Width, Orientation and Margins.

Add Label to Sec:

- Select the section where you want the labels for the DB Fields to appear when you start dropping the DB fields onto your report.

  If you do not make this selection prior to dropping DB Fields onto your report, only the data portion of the field will appear. You would then have to add the Field Labels to your report by adding the Standard -> Label or Text element to the report for each DB Field.

Report Sections

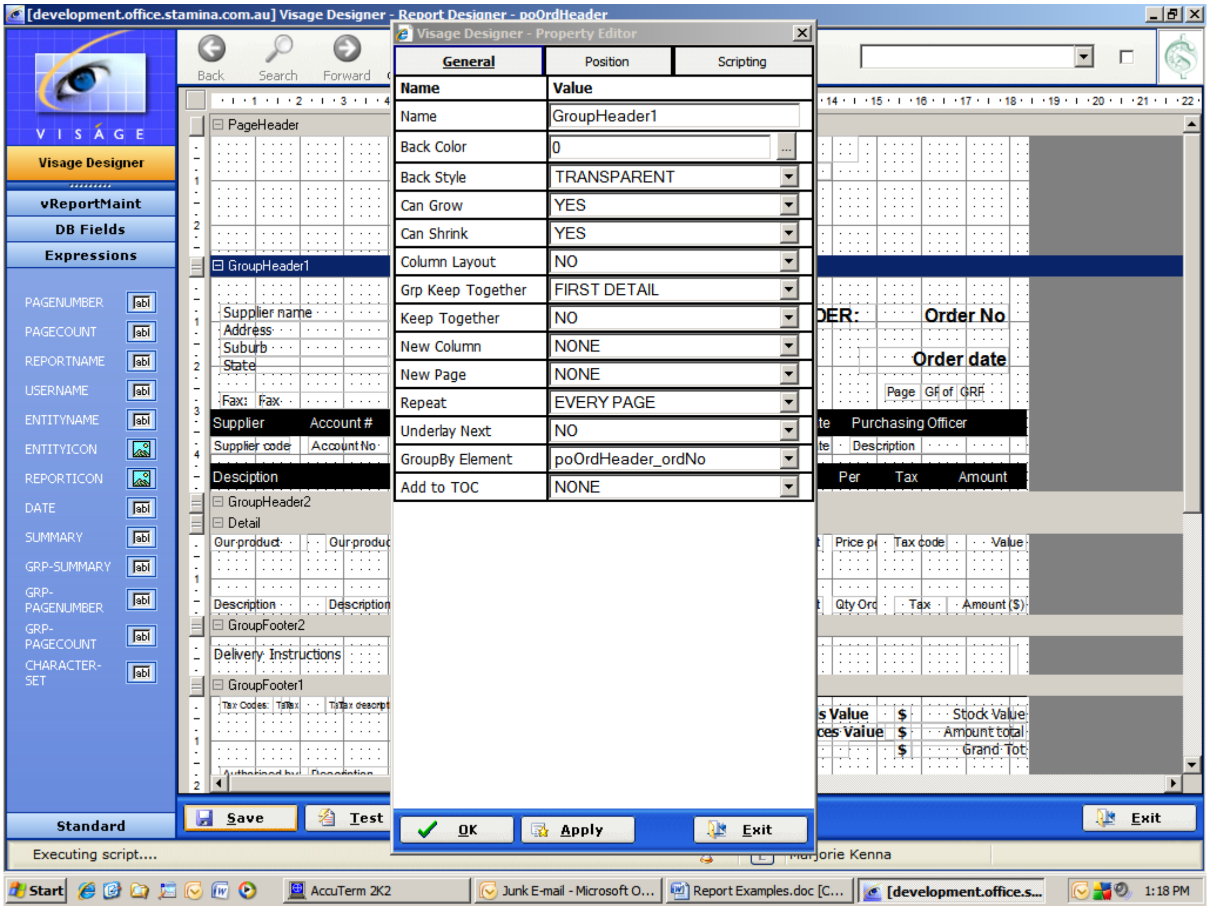


Figure 83: GroupHeader1 Section Properties

1. **ReportHeader –** Contains everything you want to print on the first page of your report **ONLY.** In this example we have deleted the Report Header.

   - **Delete Report Header –** Position cursor anywhere in the Report Header section.
     - Right click the mouse button.
     - Select the Delete Section option.
     - Left click the mouse button to confirm deletion.
     - Report Header and Report Footer is deleted.

2. **PageHeader –** Contains everything you want to print on the top of each page of your report. In this example we will add the fields for the Company Name, Address, Contact Details, ABN plus the Reporter Icon.
   - Add – DB Fields to Section – Left click on DB Fields button in Navigation Bar. Drag and drop the fields onto you report.
   - Add - Reporter Icon – Left click on Expressions in Navigation Bar. Drag and drop the REPORTERICON image to the required location in the PageHeader section of the report.

3. **GroupHeader1 –** Contains details of how this report is grouped.
   - Click the mouse and highlight the GroupHeader1 Section.

- Position mouse anywhere in GroupHeader1 Section
- Right click mouse then left click mouse to select SecProperties option
- Select the GroupBy Element option and locate the poOrdHeader_ordNo field
- Set other options in this Property Editor as indicated
- Click ok

The Purchase Order will then be grouped by Order No field. Within each group the common factors are Supplier Name, Address Details, Order Date and Order Number, together with Page Number. Add these fields onto your report.

4. **GroupHeader2 –** If you then wanted to group the report by another field, you would enter the details in this section. In our example, we have not set any details for the GroupHeader2 section. We will use the GroupFooter2 section to add Delivery Instructions to the Purchase Order. If there is a GroupHeader there must be a corresponding GroupFooter. You cannot have a GroupFooter without a GroupHeader.

5. **Detail -** Contains the details of your report.

    - Add the fields for: Product Code, Product Description, Price, Quantity, Tax eg the lines of the Purchase Order

6. **GroupFooter2 –** In our example add the Delivery Instructions field.

7. **GroupFooter1 –** In our example add the fields for - Totals of the Goods, Services, GST, and Grand Total.

    - Set Properties of GroupFooter1 as indicated below.

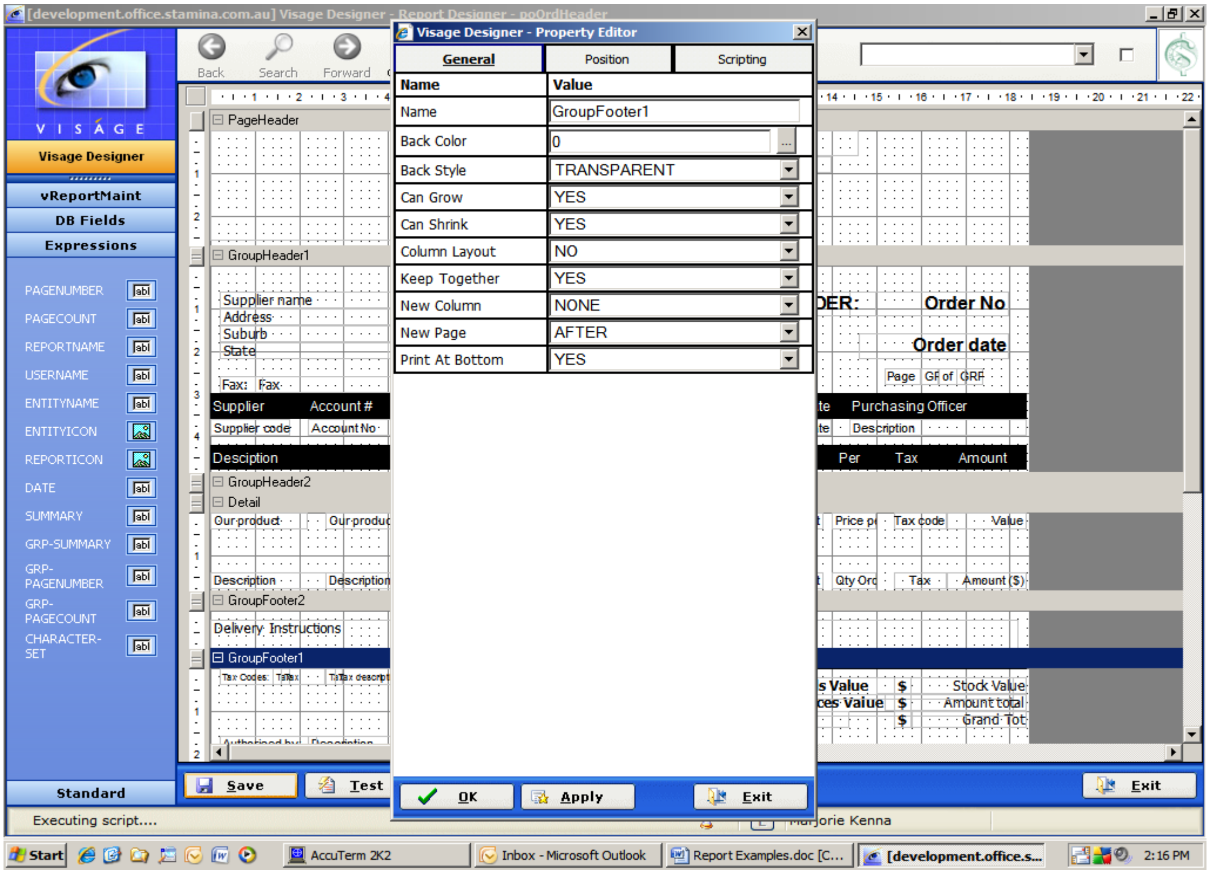


Figure 84: GroupFooter1 Properties

8. **PageFooter –** Contains everything you want to print on the bottom of each page of your report. You might want to add the Page number here instead of in the Group Header.

9. **ReportFooter** – Contains everything you want to print on the Report Footer. Report footer will always print on the last page of your report.

   If you do not have anything appearing in the Report Header or Report Footer, you can delete this section.

   If you have something appearing in the Report Footer and nothing appearing in the Report Header, you can set the Report Header size to Nil and add in the fields to print in the Report Footer.

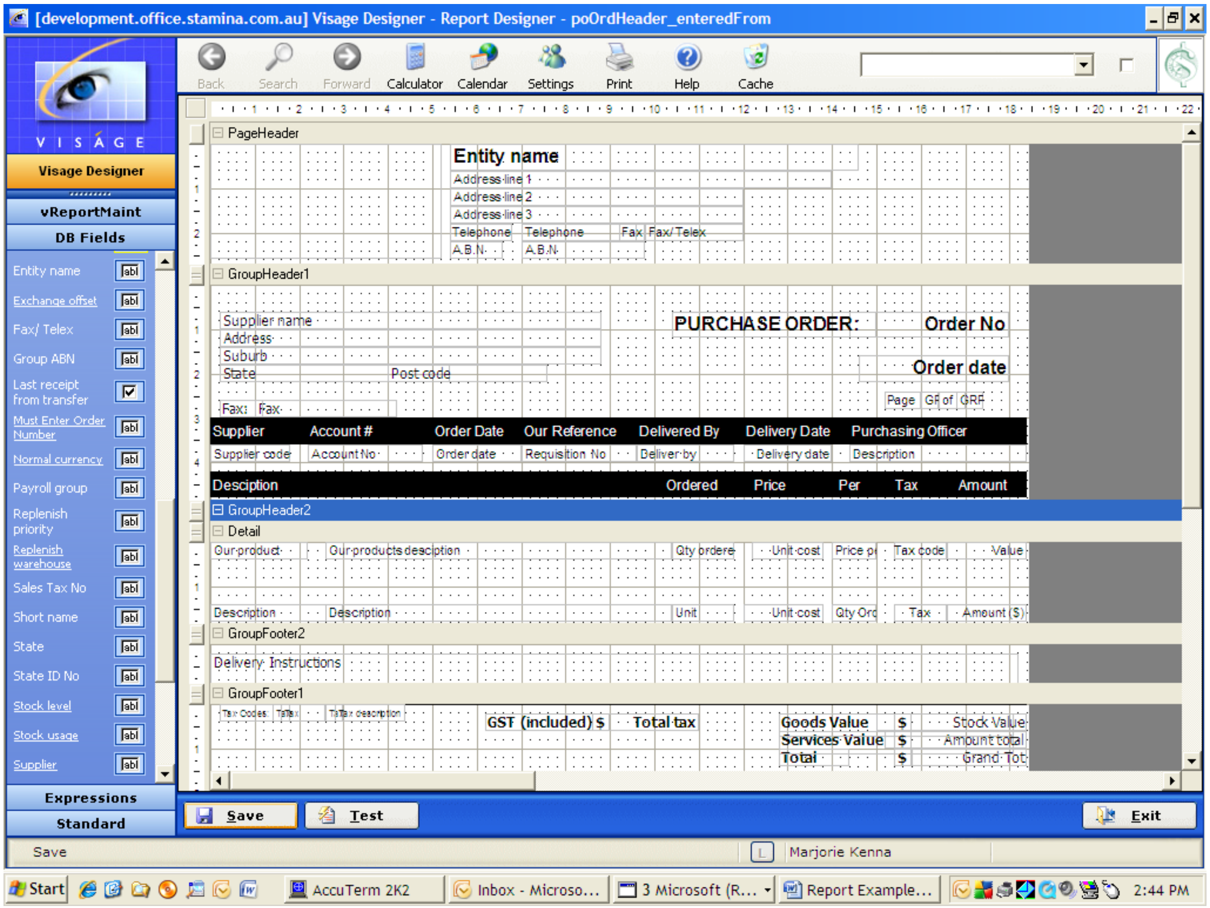


Figure 85: Screen 2 of vReportMaint for potOrders Report

REPORT OUTPUT

Below are screen images of how a two Page Purchase Order and a single Page Purchase Order would look like from the report you have created in this example.

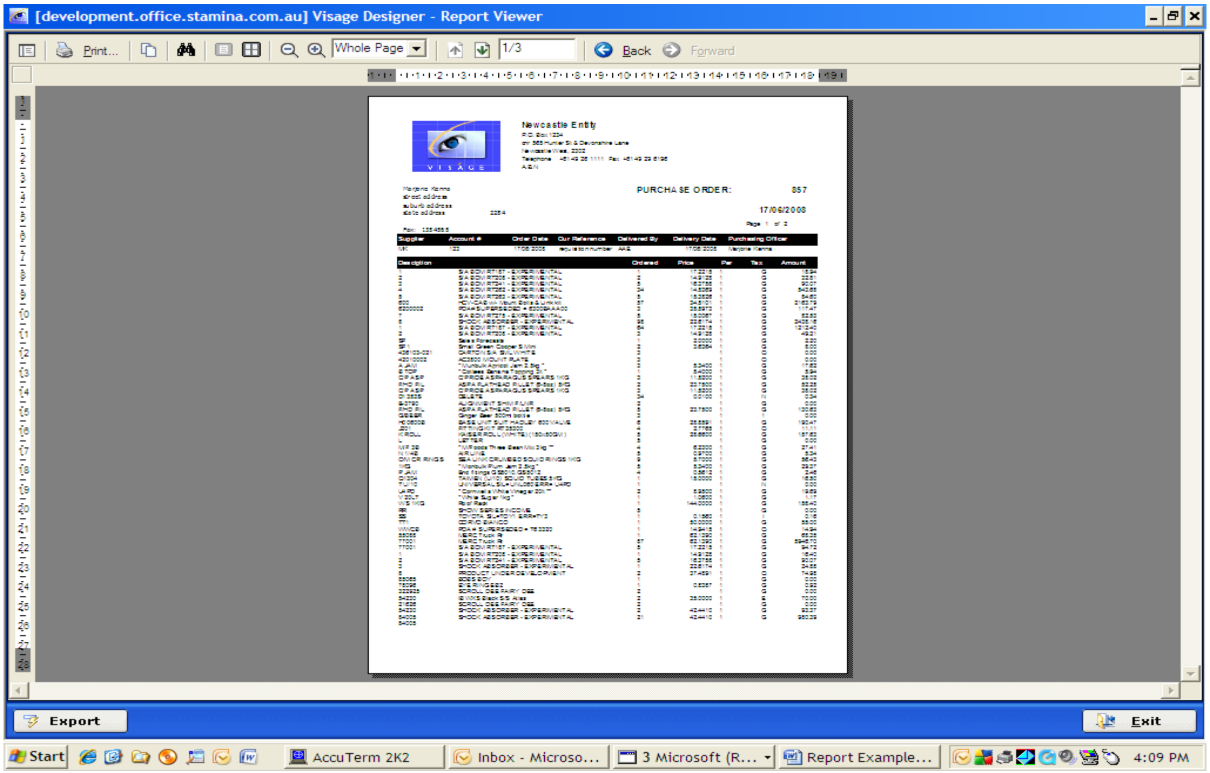


Figure 86: Page 1 of a two Page Purchase Order

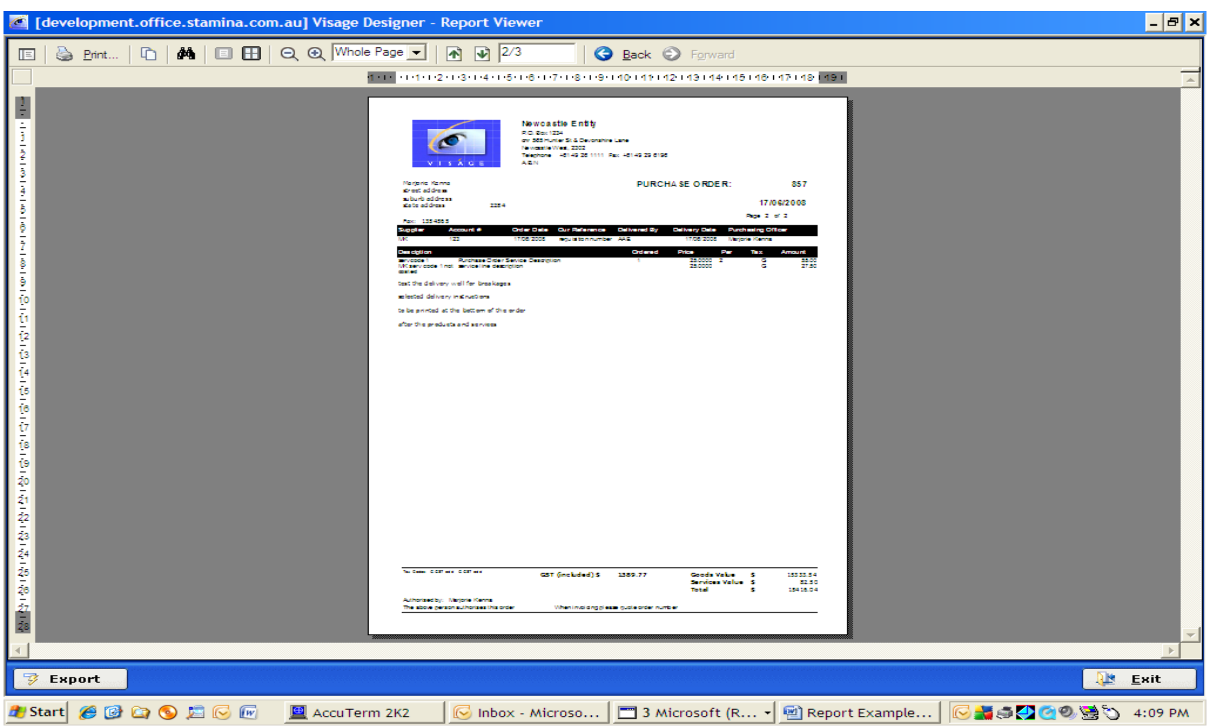


Figure 87: Page 2 of the two Page Purchase Order from Figure 86.

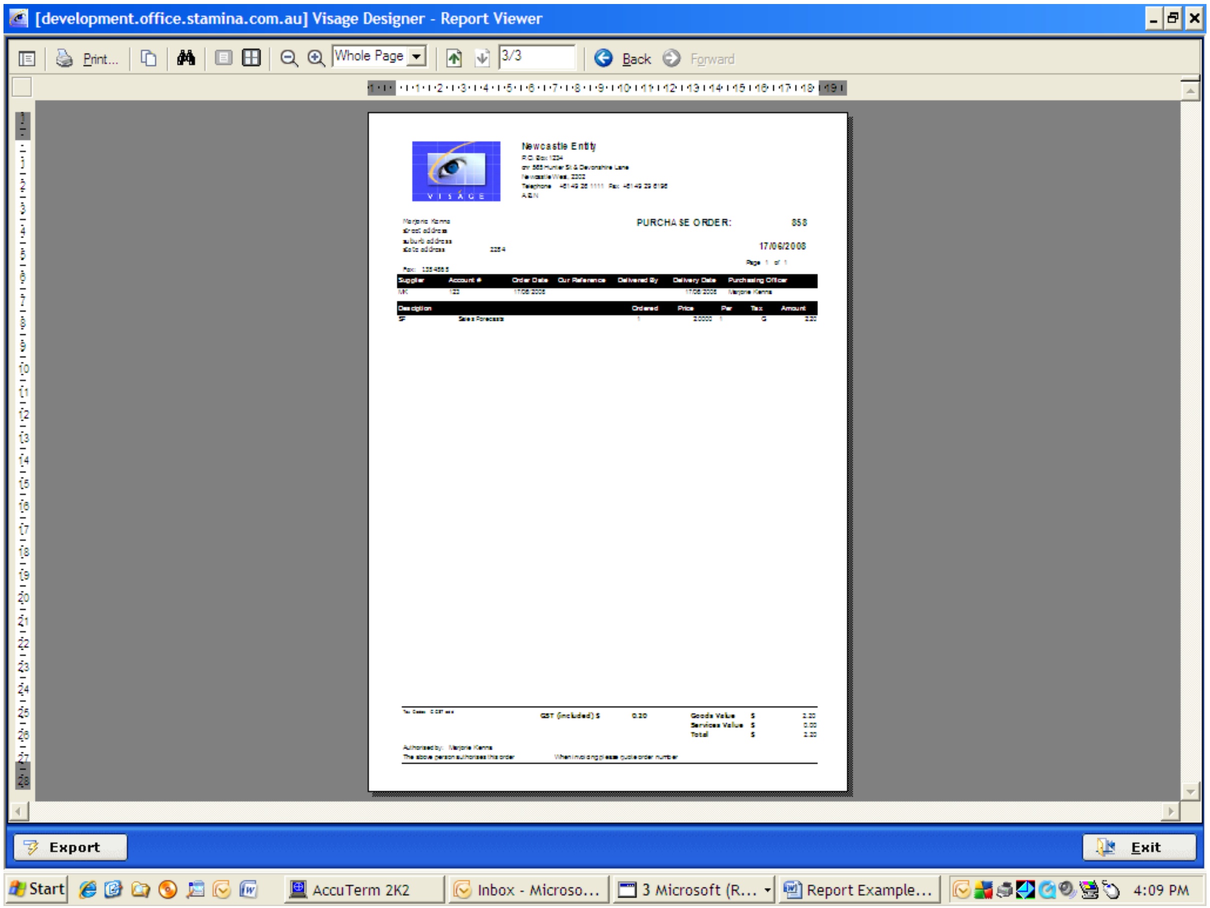


Figure 88: Copy of a single page Purchase Order

Report Example 4 – List of Bank Accounts

To generate a Report to Print Bank Account details where one Bank Account has many Statement Import Transactions associated with the account – follow these steps.

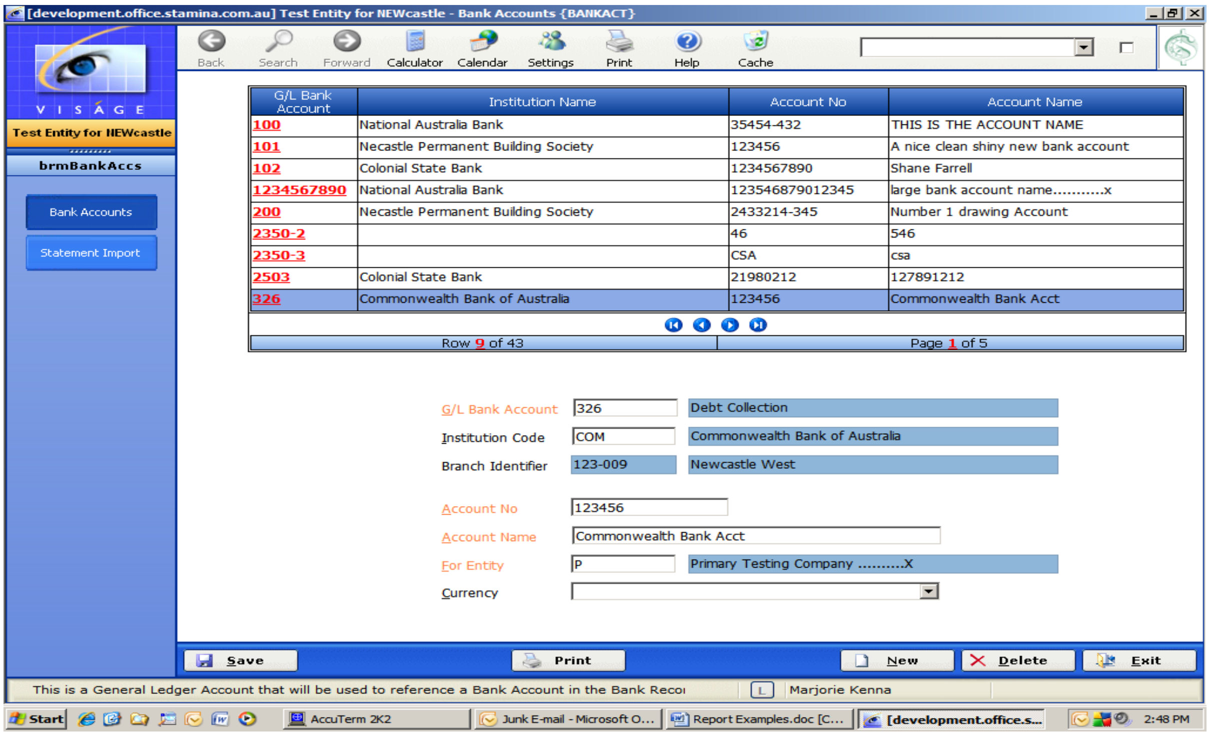


Figure 89: Bank Account Details screen

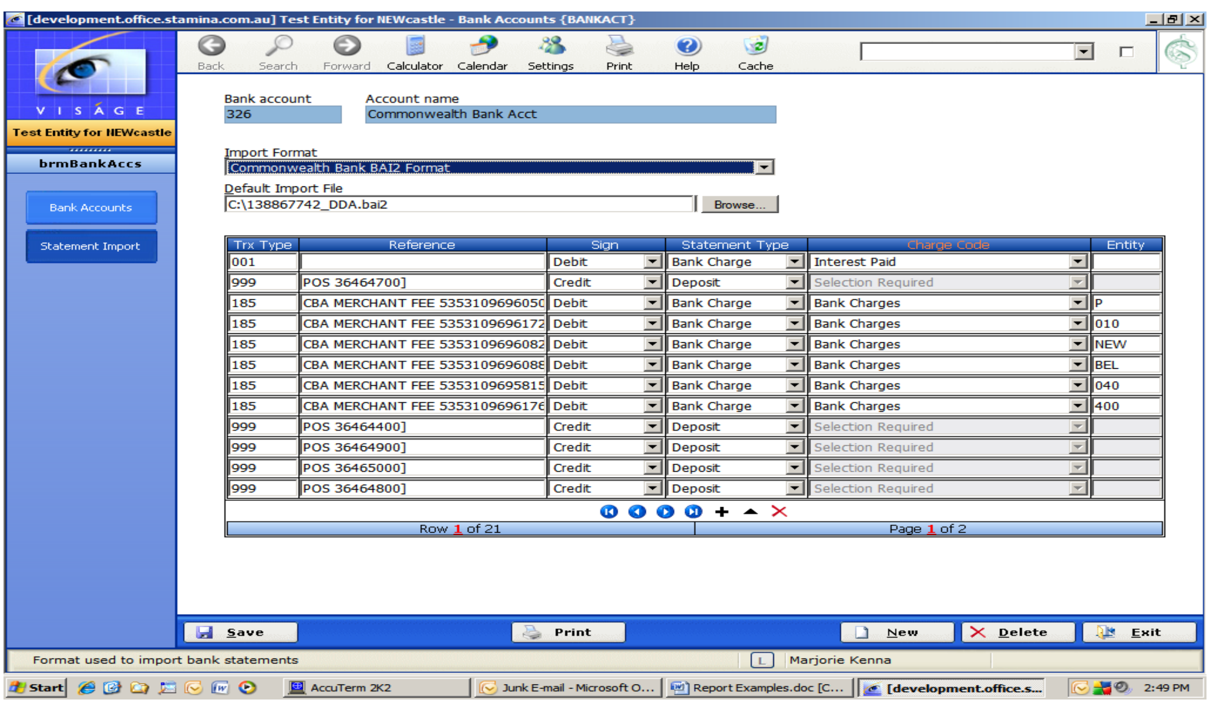


Figure 90: Import Transactions associated with selected Bank Account

Report Example 4 - List of Bank Accounts Report

Navigate to the Design Option -> Reports -> Reports in Viságe.

1. **Report** – Enter name for your report.
2. **Design** – Not used in this example, so left blank.
3. **Description** – Enter a meaningful description for the report. In this example we have used Bank Account List.
4. **Report Type** – Set to Standard in this example.
5. **Template** – In this example we are using the Default Report Template. This template has been set up previously and will allow us to display the Report Name, Entity Name, and Requested by username, Date, Time and Page numbers each time this Template is used.
6. **Delivery Type** – Not used in this example, so left blank.
7. **Filename** – Enter file name to be used as a basis of your report. In this example the file name being used is brBankAccs.
8. **Control** – Set on Screen 2 of vReportMaint to trxtype in this example.
9. **Repeat** – Not set on this report.
10. **Sort Dictionary Item** – Set on Screen 2 of vReportMaint to glBankAcc_code in Ascending Order.

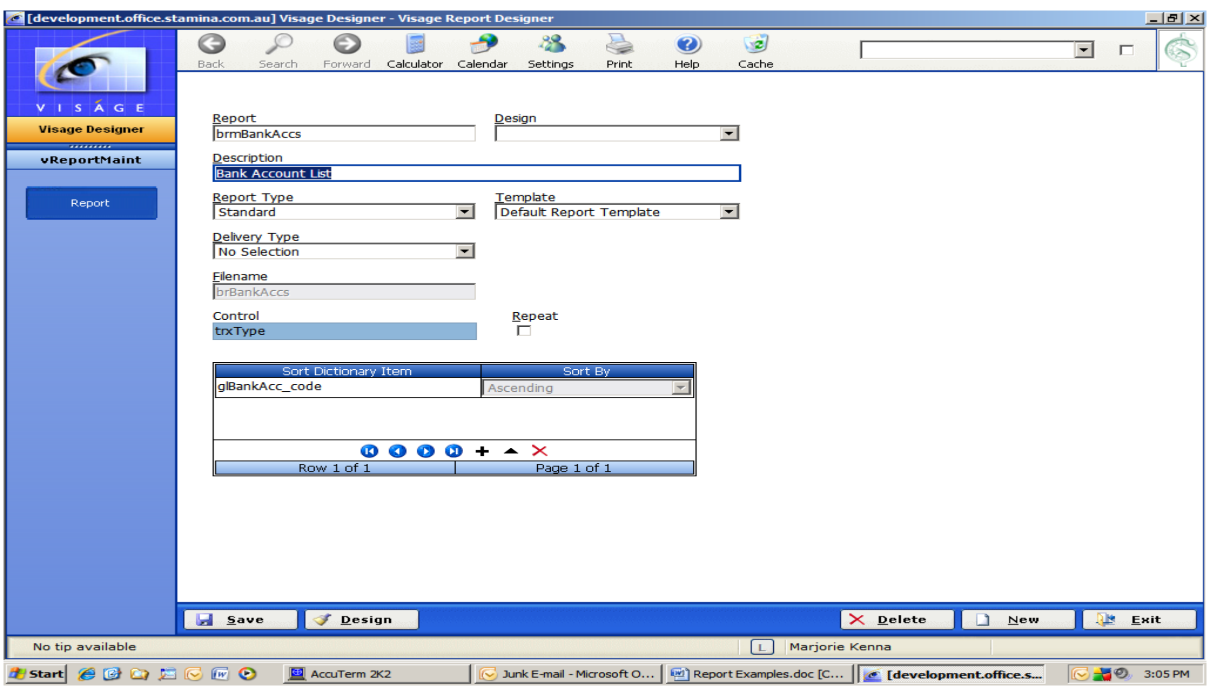


Figure 91: vReportMaint Screen 1 for the Bank Accounts Report

Report Properties

Prior to commencing the design of your report, take some time to consider the layout/design of your report.

View Report Properties

- Position mouse in a vacant spot on Screen 2.
- Click Mouse
- Select Properties

Page Details:

- Set all page related options according to the paper size and layout of the report to be printed. Eg. Size, Border, Width, Orientation and Margins.

Add Label to Sec:

- Select the section where you want the labels for the DB Fields to appear when you start dropping the DB fields onto your report.

  If you do not make this selection prior to dropping DB Fields onto your report, only the data portion will display. You would then have to add the Field Labels to your report by adding the Standard -> Label or Text element to the report for each DB Field.

Control Element:

- Set the Control Element to brBankAccs_trxtype in this example.

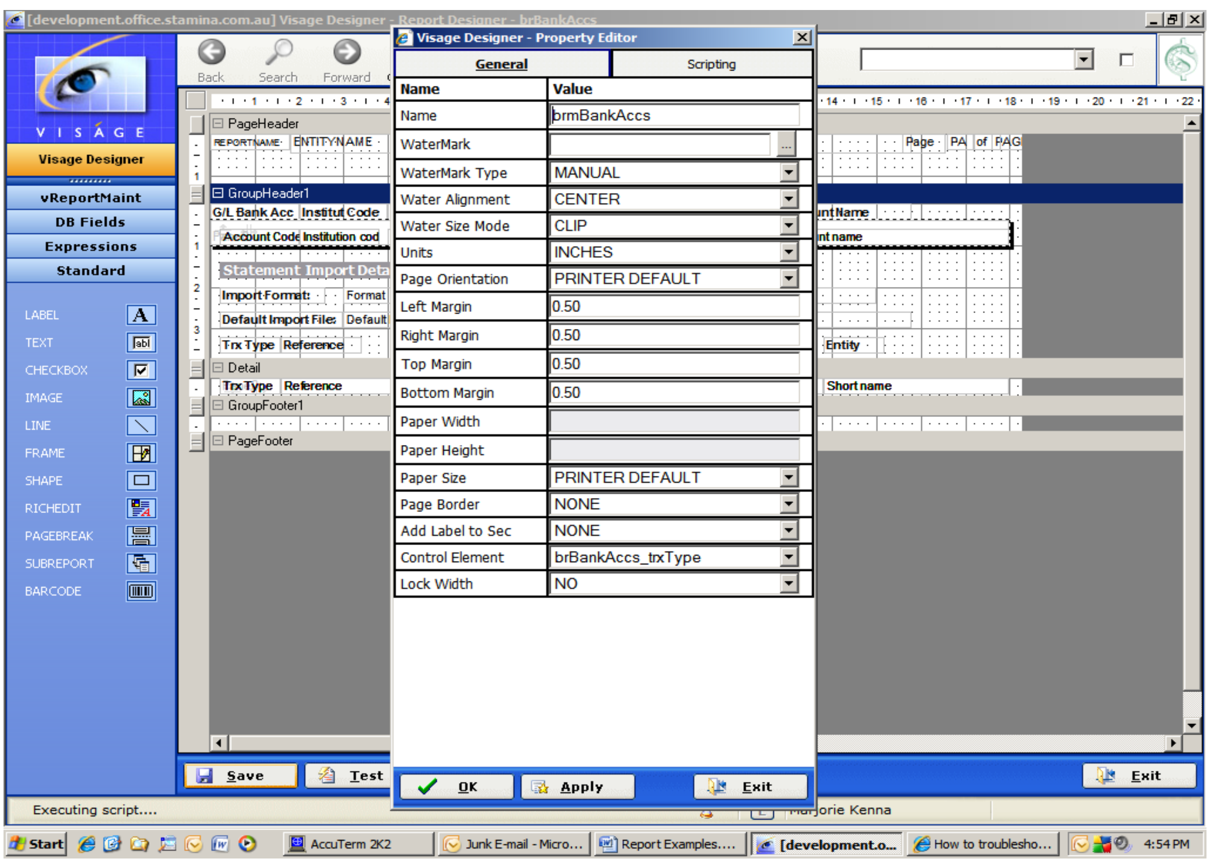


Figure 92: Report Properties

Report Sections

1. **ReportHeader** – Not used in this report, so you can delete this section.

2. **PageHeader** – The first line of this PageHeader contains the fields for ReportName, EntityName, Requested by, Date and Page Number. These details come from the Default Report Template being referenced from Screen 1 of this report setup. Details on a Template cannot be changed from a report. Changes to Templates can only be carried out from amending the actual Template. Any changes in a Template are then reflected in the reports where that template is being referenced.

   - Click on Standard button in the Navigation Bar.

   - Drag Label Element to top of screen – and set up as Figure 93. The Report Style of ReportSmallFontBold has been set up previously. If you do not have this style, select your own style for the heading or alternatively set up a new Style in the Style Menu.

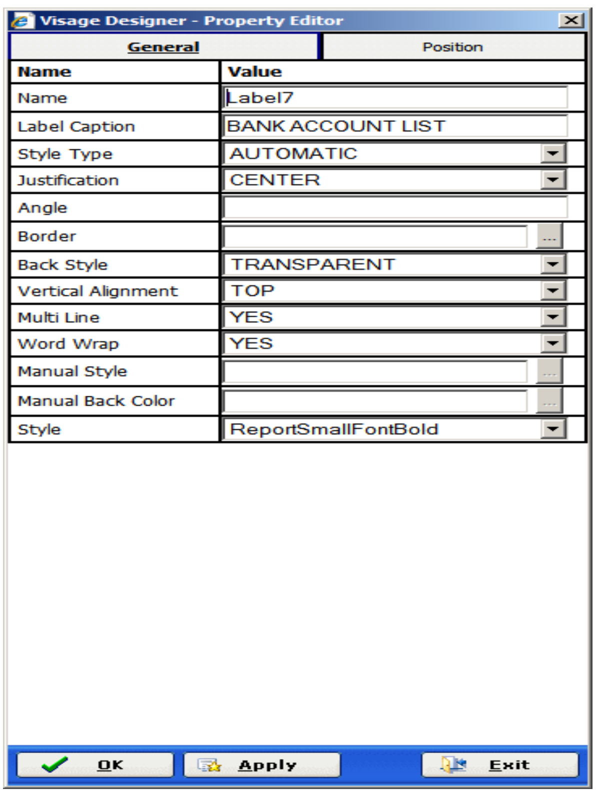


Figure 93: Label Element for name of report

   - Click ok and position as required.

3. **GroupHeader1 –** Contains details of how the report is grouped plus details of what will appear in the Group.

    - Add the fields for each of these elements to the GroupHeader1 section of the report.

    - The fields – Account Code, Institution Code, Branch Name, Branch ID, Account No and Account Name has been added to a Frame after the frame has been added to the report

    - **Add a Frame**
        - Click on the Standard button in the Navigation Bar
        - Drag Frame Element to GroupHeader1 section of the report
        - Position and format as required.

    TIP!!! Add the frame first, and then add the fields into the Frame.

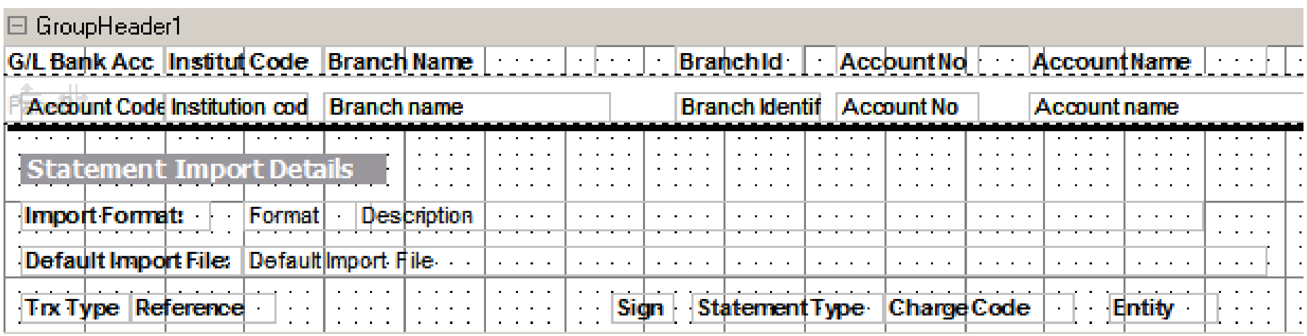


Figure 94: GroupHeader1 section of the Bank Account's Report

- Position mouse in the GroupHeader1 Section.

- Right click mouse then left click mouse to select SecProperties option.

- Set the GroupBy Element option to brBankAccs_glBankAcc_code

- Set other options in the Property Editor as indicated.

- Click ok.

The report will then be grouped by Bank Account Code field.

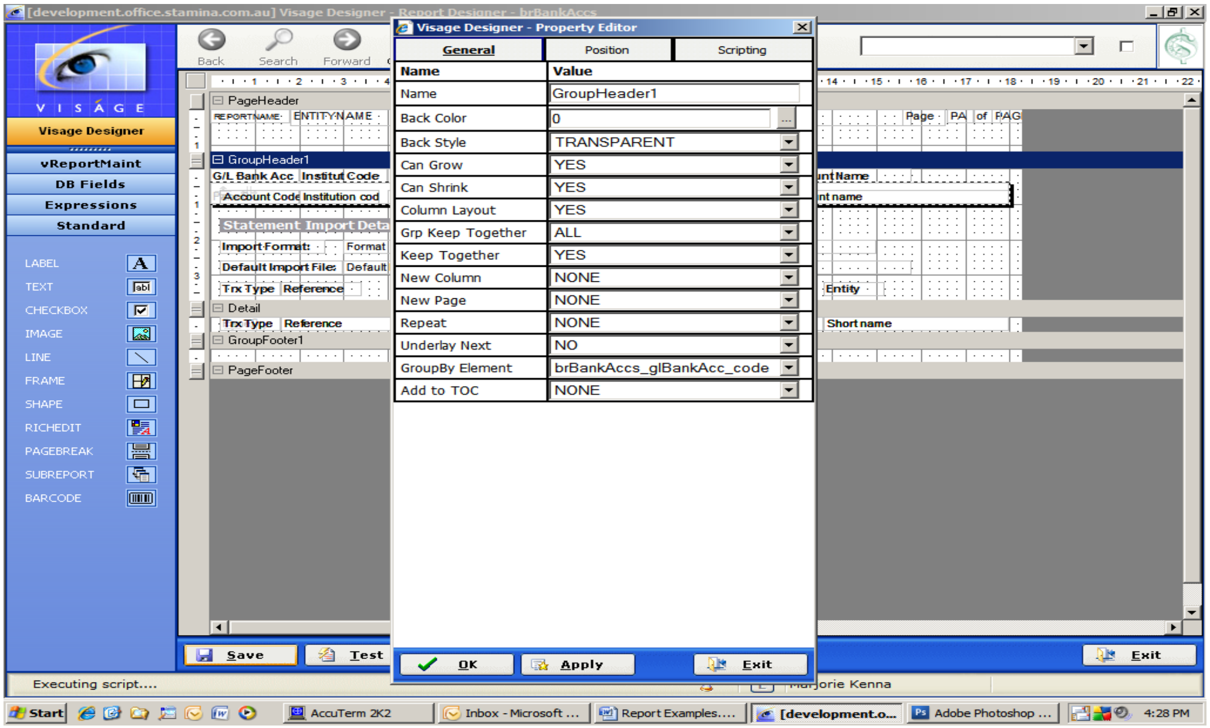


Figure 95: GroupHeader1 Section Properties

4. **Detail** – Contains the details of your report.

    - Add the fields for: Trx Type, Reference, Sign, Statement Type, Charge Code and Entity from DB Fields to the detail section of the report. Position and format as required.

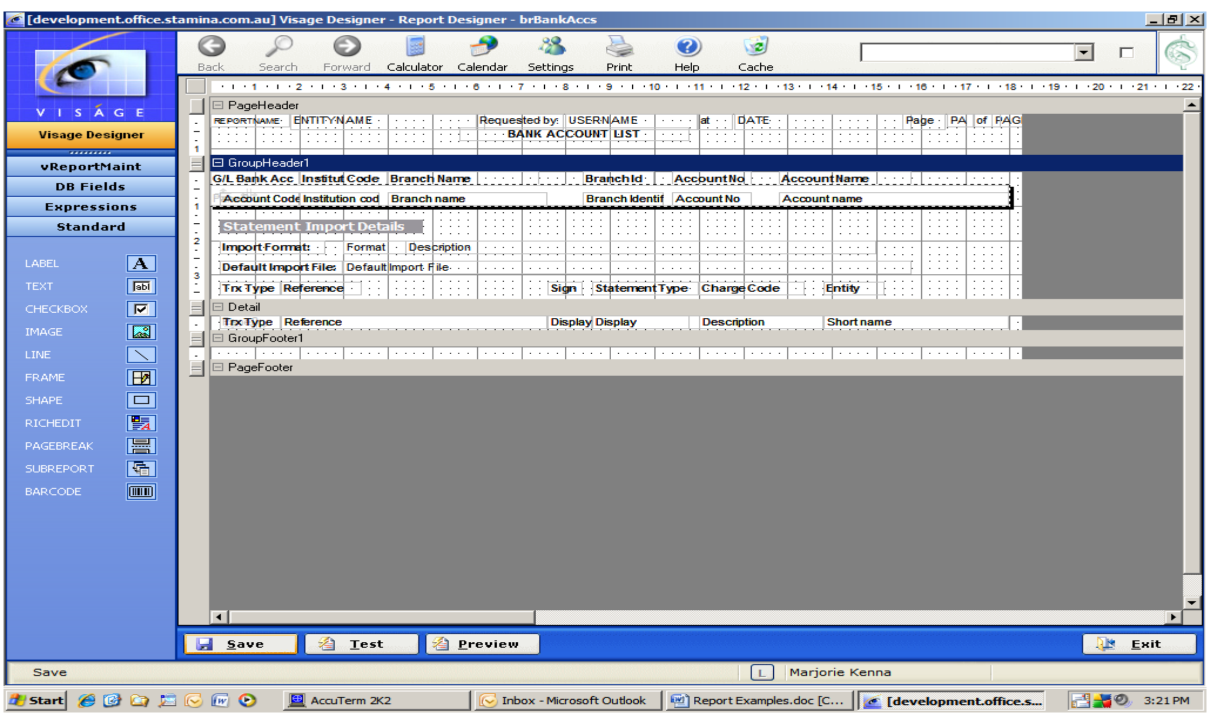


Figure 96 : vReportMaint Screen 2 for the Bank Accounts Report

Set Sort Order of the Report

If you were only ever printing this report for a single bank account you would not need to worry about setting up Sort Order.

However if you have cause to print this report for more than one bank account you would want to set the sort order of the report.

In this example we will be setting the sort order to be the Bank Account field.

- Select the field for the Bank Account field.
- Right click and select Properties
- Set the Sort Order to Ascending
- Click ok

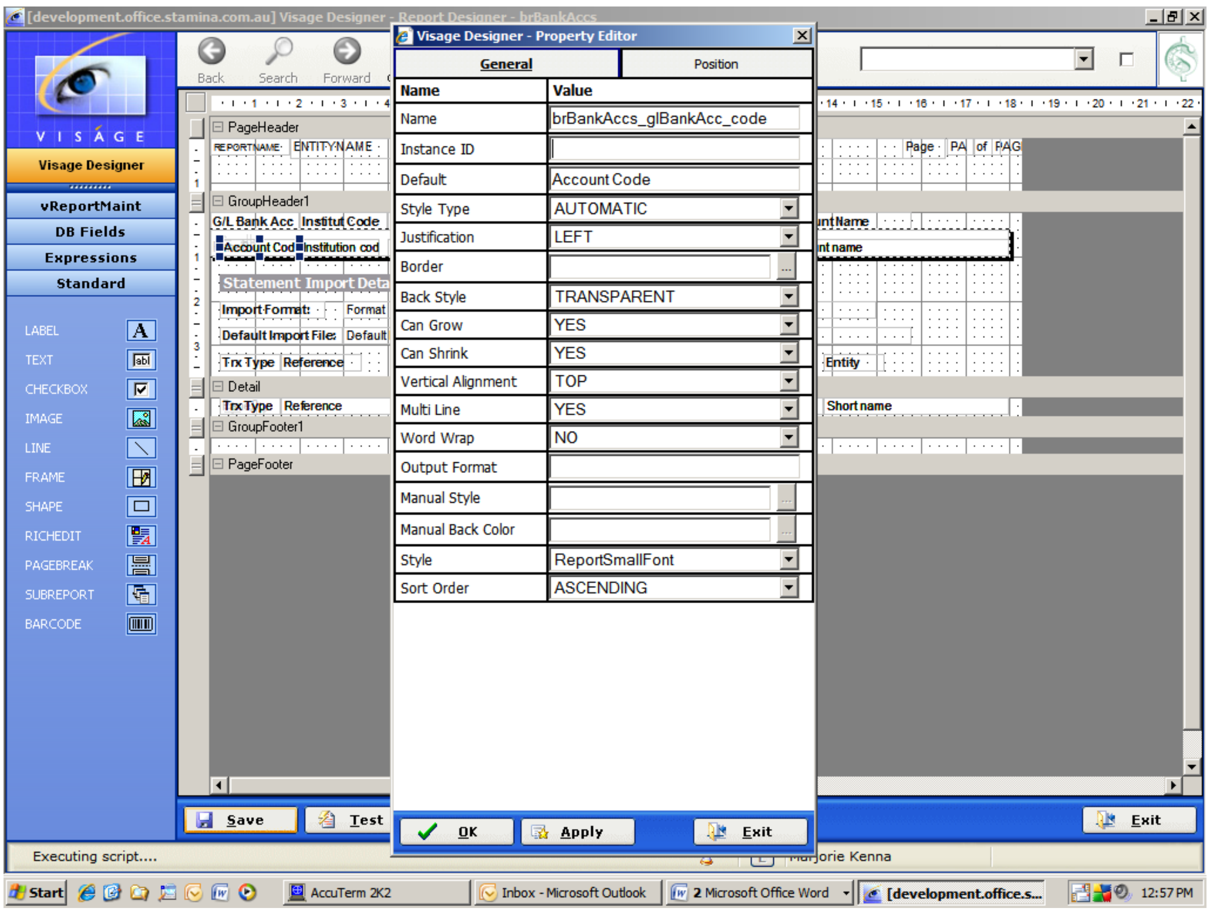
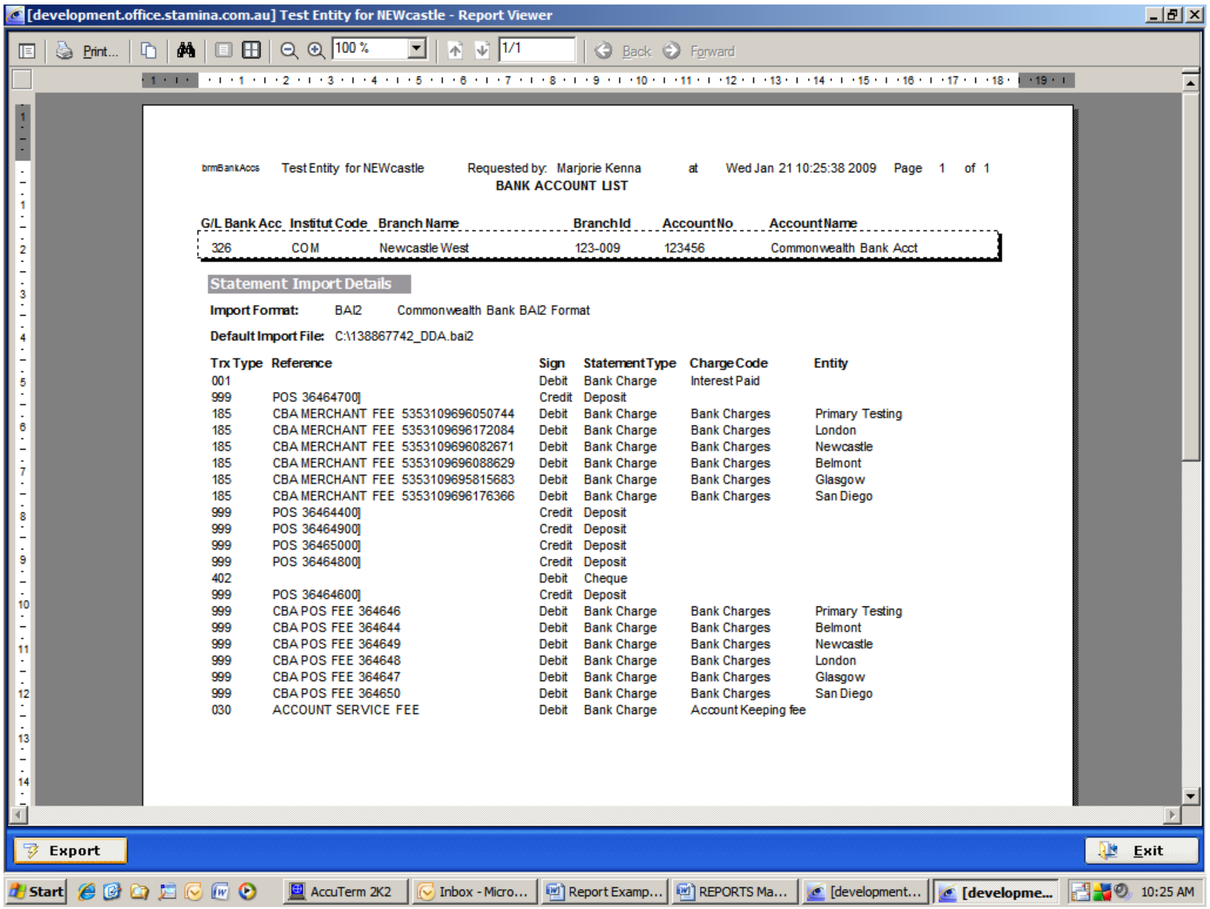


Figure 97: Setting sort order to Bank Account Code field

REPORT OUTPUT

Below is an example of the output generated from the Report you have just created.



[development.office.stamina.com.au] Test Entity for NEWcastle - Report Viewer

brmBankAccs Test Entity for NEWcastle Requested by: Marjorie Kenna at Wed Jan 21 10:25:38 2009 Page 1 of 1

BANK ACCOUNT LIST

G/L Bank Acc	Institut Code	Branch Name	BranchId	AccountNo	AccountName
326	COM	Newcastle West	123-009	123456	Commonwealth Bank Acct

Statement Import Details

Import Format: BAI2 Commonwealth Bank BAI2 Format

Default Import File: C:\138867742_DDA.bai2

Trx Type	Reference	Sign	Statement Type	Charge Code	Entity
001		Debit	Bank Charge	Interest Paid	
999	POS 36464700]	Credit	Deposit		
185	CBA MERCHANT FEE 5353109696050744	Debit	Bank Charge	Bank Charges	Primary Testing
185	CBA MERCHANT FEE 5353109696172084	Debit	Bank Charge	Bank Charges	London
185	CBA MERCHANT FEE 5353109696082671	Debit	Bank Charge	Bank Charges	Newcastle
185	CBA MERCHANT FEE 5353109696088629	Debit	Bank Charge	Bank Charges	Belmont
185	CBA MERCHANT FEE 5353109695815683	Debit	Bank Charge	Bank Charges	Glasgow
185	CBA MERCHANT FEE 5353109696176366	Debit	Bank Charge	Bank Charges	San Diego
999	POS 36464400]	Credit	Deposit		
999	POS 36464900]	Credit	Deposit		
999	POS 36465000]	Credit	Deposit		
999	POS 36464800]	Credit	Deposit		
402		Debit	Cheque		
999	POS 36464600]	Credit	Deposit		
999	CBA POS FEE 364646	Debit	Bank Charge	Bank Charges	Primary Testing
999	CBA POS FEE 364644	Debit	Bank Charge	Bank Charges	Belmont
999	CBA POS FEE 364649	Debit	Bank Charge	Bank Charges	Newcastle
999	CBA POS FEE 364648	Debit	Bank Charge	Bank Charges	London
999	CBA POS FEE 364647	Debit	Bank Charge	Bank Charges	Glasgow
999	CBA POS FEE 364650	Debit	Bank Charge	Bank Charges	San Diego
030	ACCOUNT SERVICE FEE	Debit	Bank Charge	Account Keeping fee	

Figure 98: Example of Report showing the Bank Account with the Statement Import Details

Set up Process to Print Report

A report will normally be initiated from a Process. It could be a standard Maintenance Process or a Transaction Entry Process or a Print Initiation process.

Example:

To initiate the report from a standard Maintenance process called - armCust

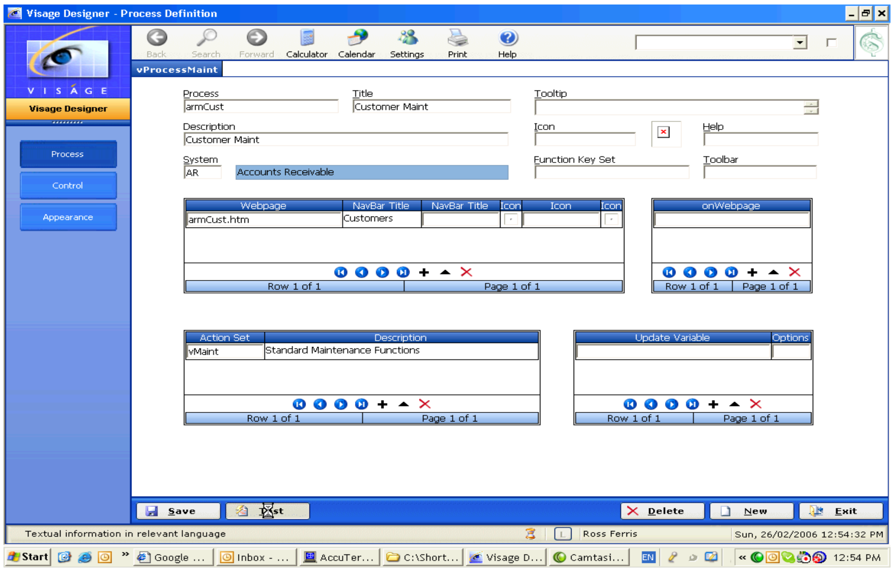


Figure 99: Process Maintenance Screen for armCust

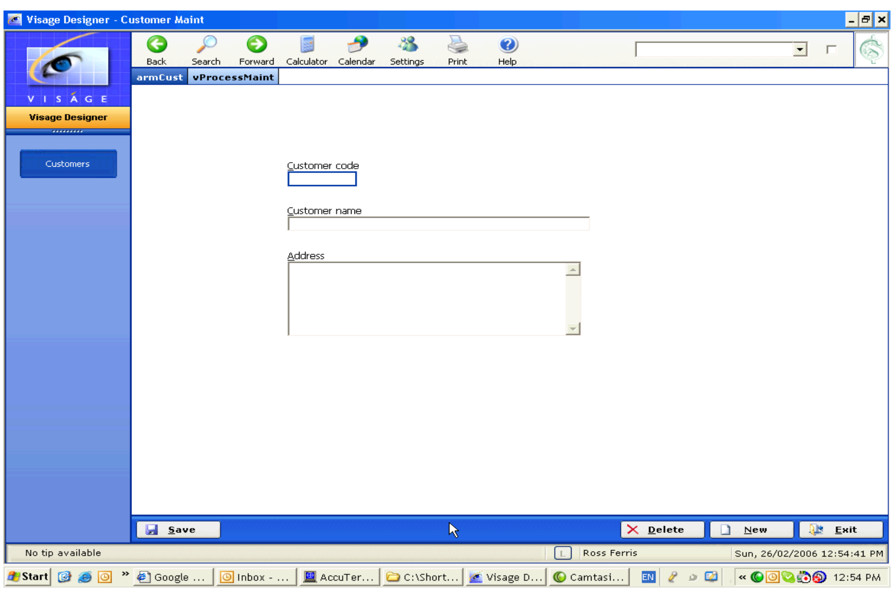


Figure 100: Process Screen for armCust

This standard process must be working off the same file as was used when creating the report. eg. arrCustomers report is working off the arCustomers file, armCust maintenance process is working off the arCustomers file.

You now need to tie the report – arrCustomers to the process armCust.

Steps:

1. Load up the armCust process

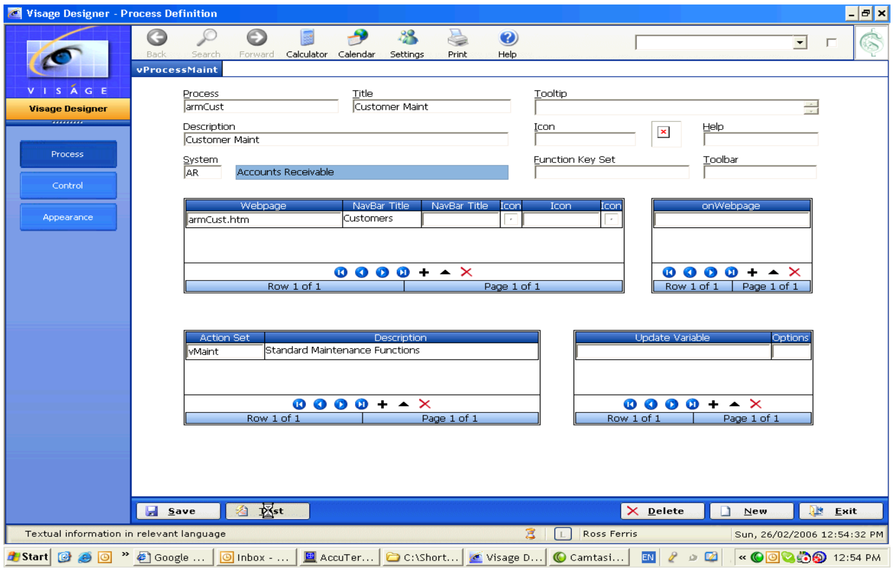


Figure 101: Process Screen for armCust process

2. Add another row to the Action Set / Description table.
3. Add the Action Set of Print – enter Continue button for Reports
4. Left click on the Control button on the left side of screen.

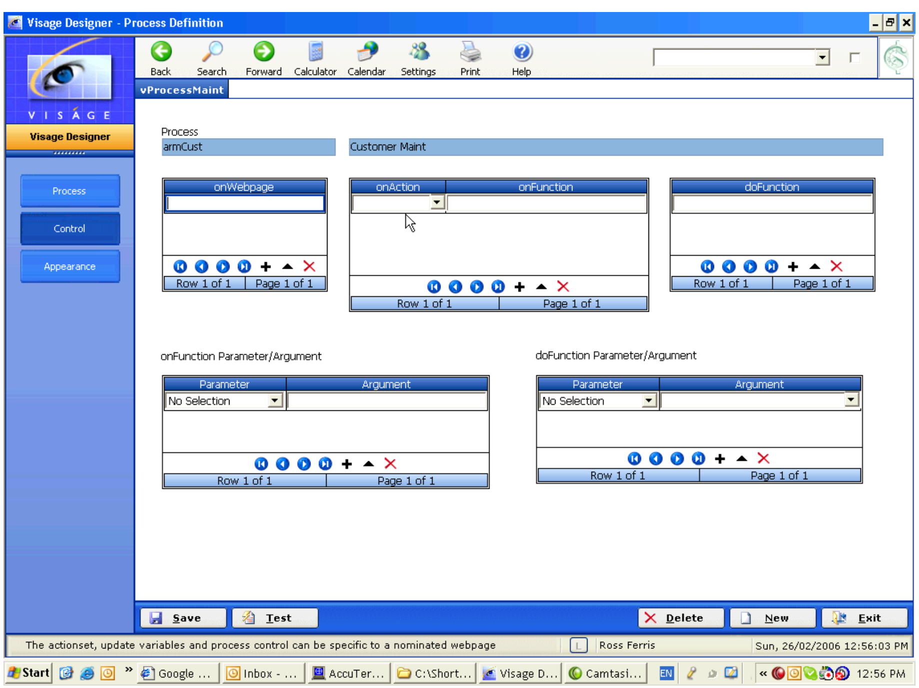


Figure 102: Control screen for armCust Process.

5. You will need to add **Print** to the onAction area

6. You will need to add **wl.report** to the doFunction area. (wl.Report is documented in the online help of Viságe)

7. You will need to select **Report** from the doFunction Parameter/Argument.

8. Enter the Argument of **/arrCustomers/**

9. Click Save.

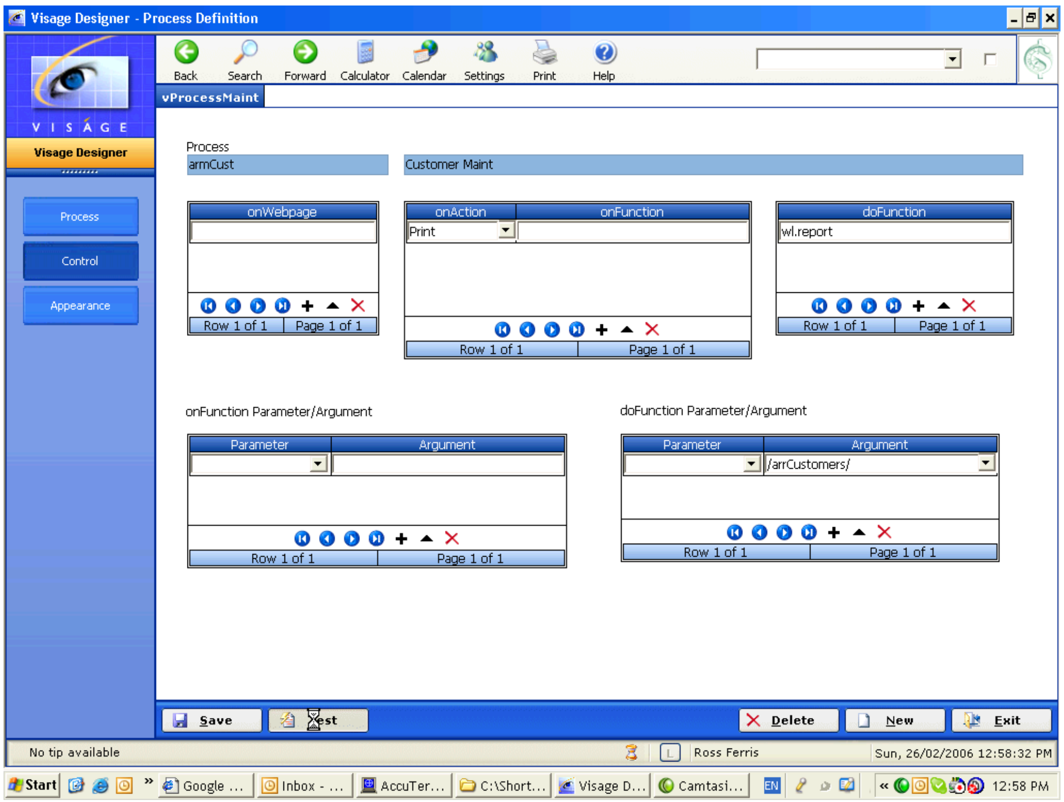


Figure 103: armCust process with Report – arrCustomers defined to print when Print button selected.

10. Click Test

Example - Generating Report for Single Customer

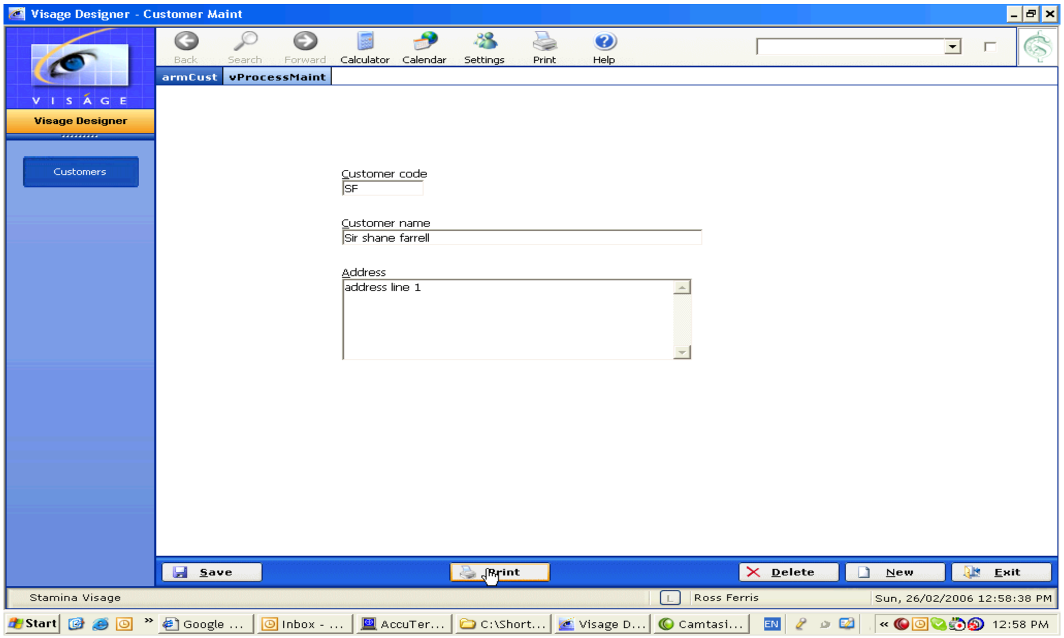


Figure 104: armCust Process with new Print Button.

11. Enter Customer details
12. Click Print Button.

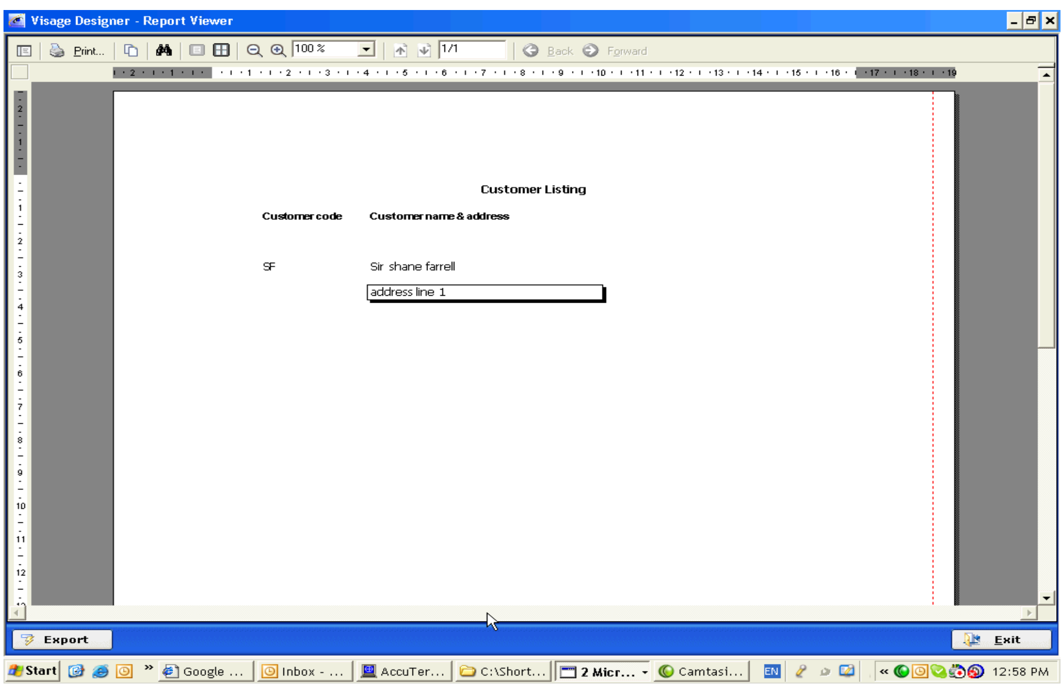


Figure 105: arrCustomers Report generated.

Report Delivery Options

You then have the option of printing the Report to any printers associated with the workstation from where the report was generated or exporting the Report to a number of file formats eg. pdf, xls, tiff, text, rich text or HTML.

Print Report

To print the report to a nominated printer

Steps:

1. Select the Print button
2. Select the nominated printer from the Window that appears. You will only have choices of printers associated with the workstation where the report was generated from.
3. Select Print.

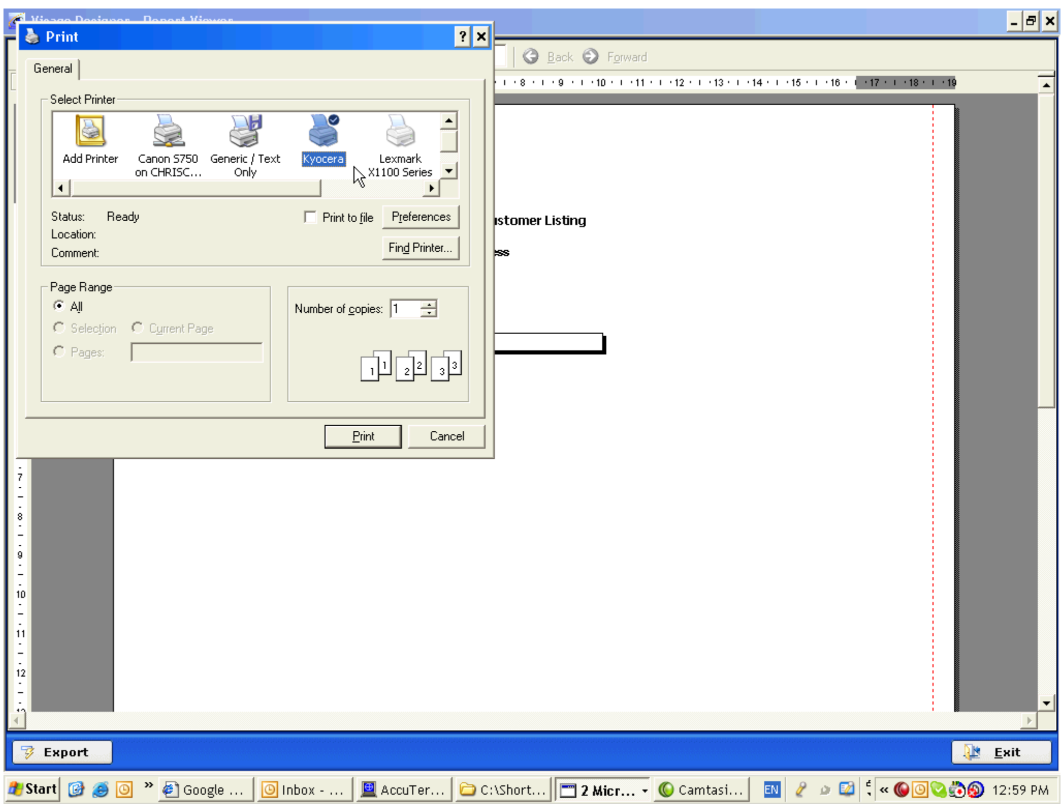


Figure 106: Printer options to select to Print Report to a printer.

Export Report

To export the report to a file

Steps:

1. Select the Export Button
2. Make your selection of File Type from the drop down list.

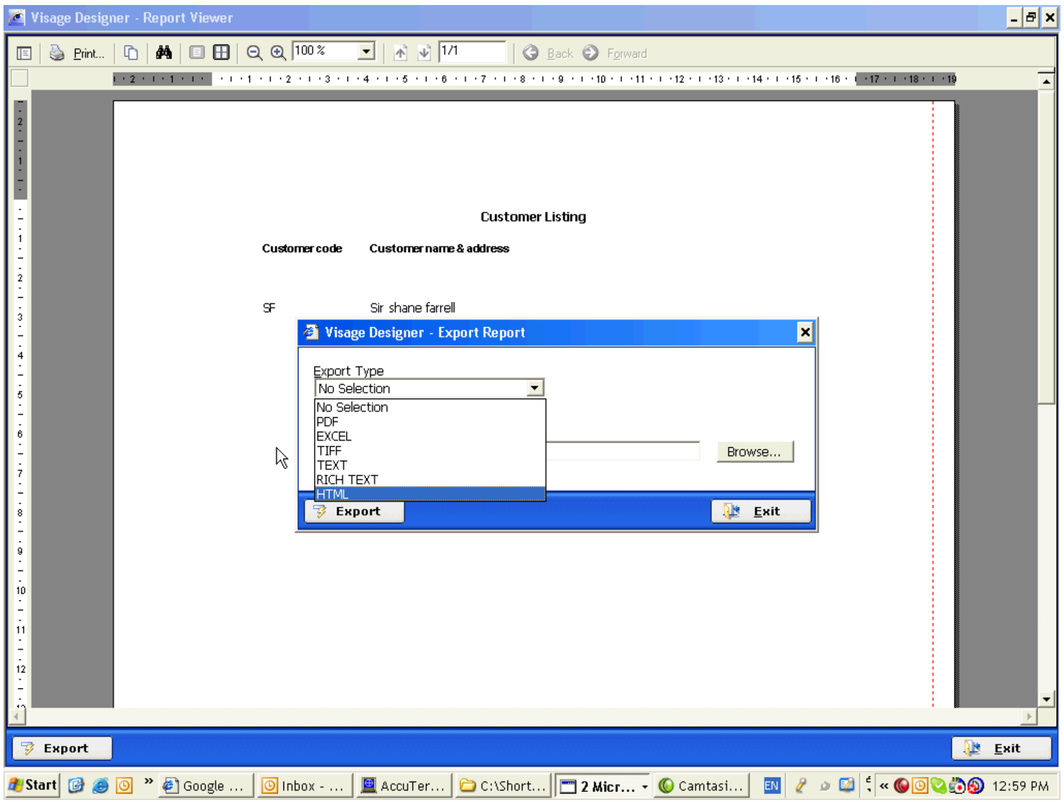


Figure 107: Selection of options available to export a report

3. In the Filename section - Enter the name of the file and location to export to.

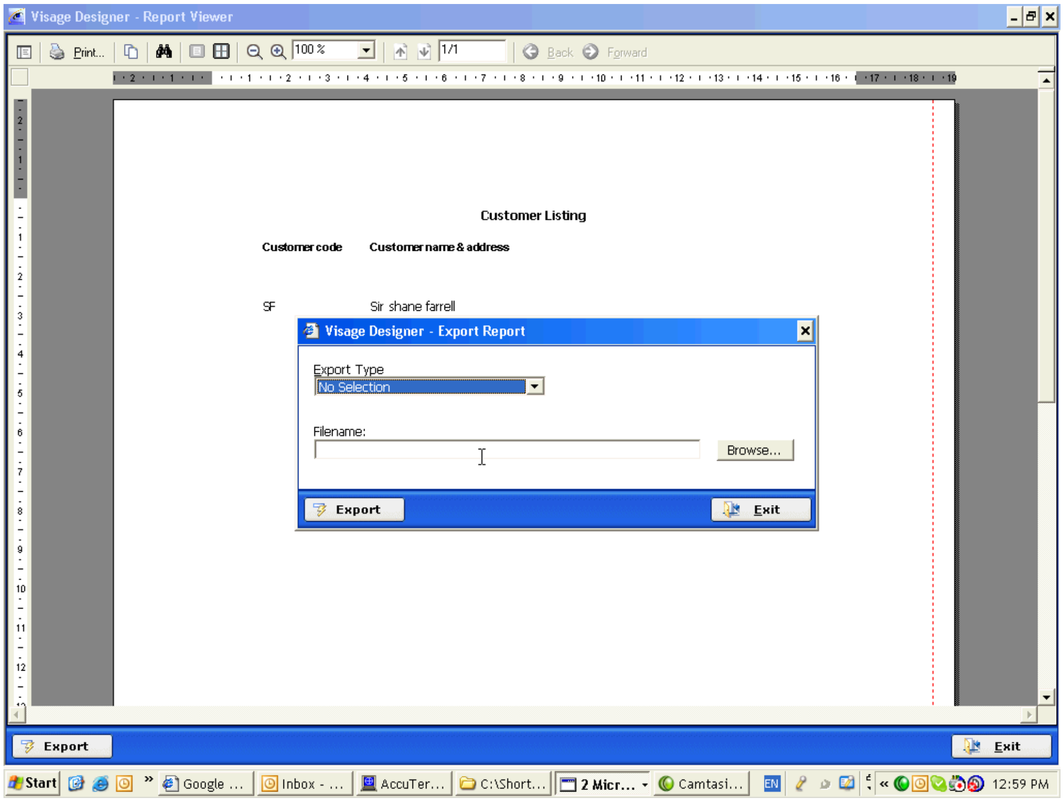


Figure 108: Enter the File name and location to export your report

4. Click Export.

The file will then be exported in the format as you have selected and to the location you have entered.

Example - Generating Report for ALL Customers

In the previous example, we had a single customer display on the process screen and then selected the Print Button. The resulting report only displayed this one customer.

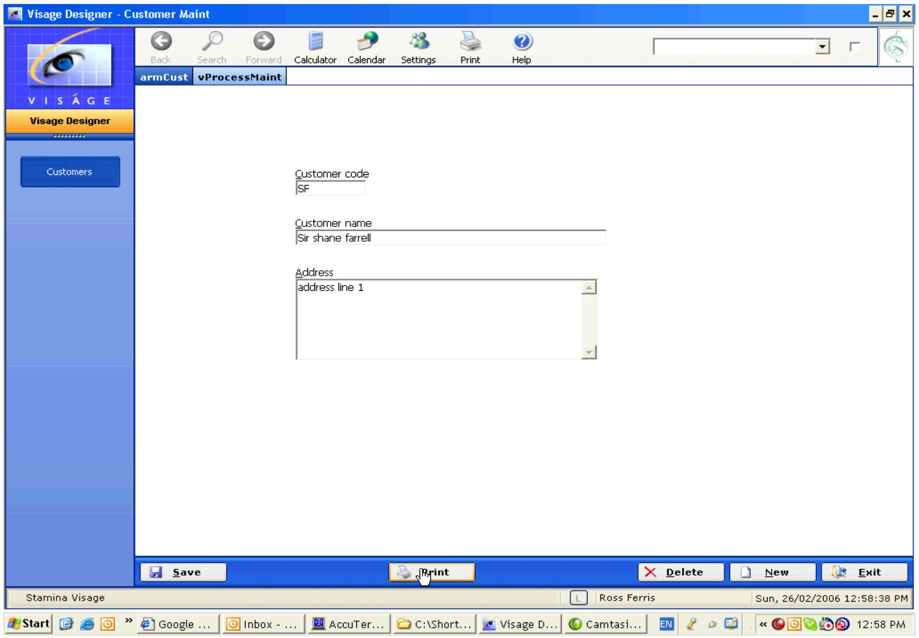


Figure 109: Single customer code entered for output to a report

A single page report would be produced showing details for a single customer only.

If you do not display any customer on screen, then click on the Print Button

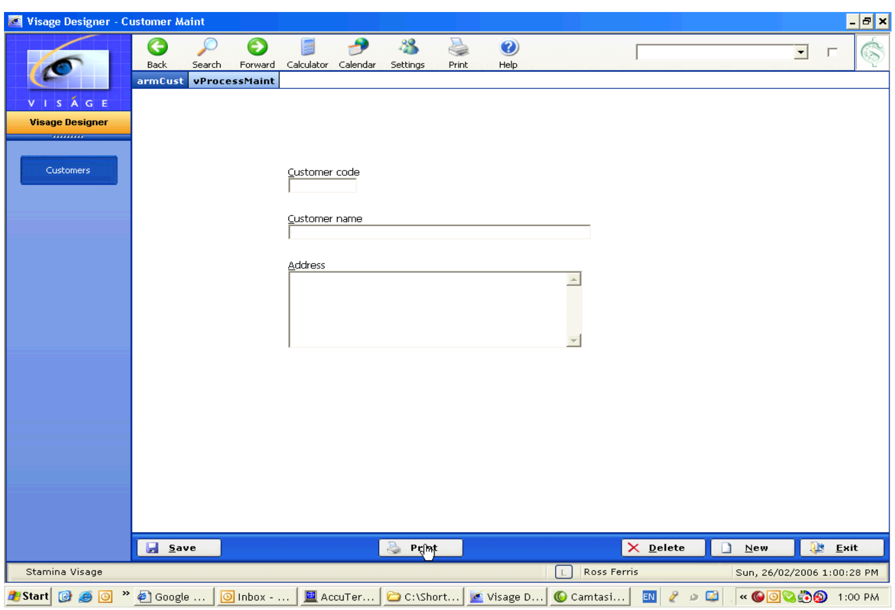


Figure 110: No customer details entered but if the Print button is clicked a report for ALL customers will be generated

The Report that is generated now is for ALL Customers.

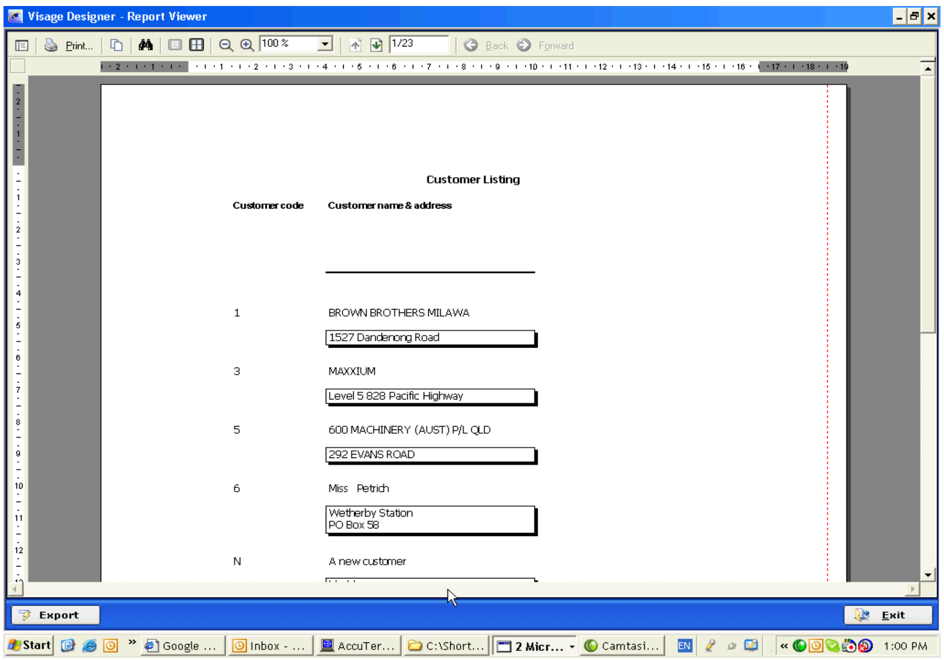


Figure 111: Samples of one page of a 23 page report that displays entries for ALL customers.

Same Report now has 23 pages and displays entries for ALL Customers.

Server Side / Client Side Printing

As well as displaying a Window box where the user can make choices of where or how the want their report to be treated, they can also select to use Server Side or Client Side Printing.

Adding a delivery Parameter with the Argument of /?/ to the Control screen of the process will display a option box to the user, where this decision can be made, after they select the Print Button.

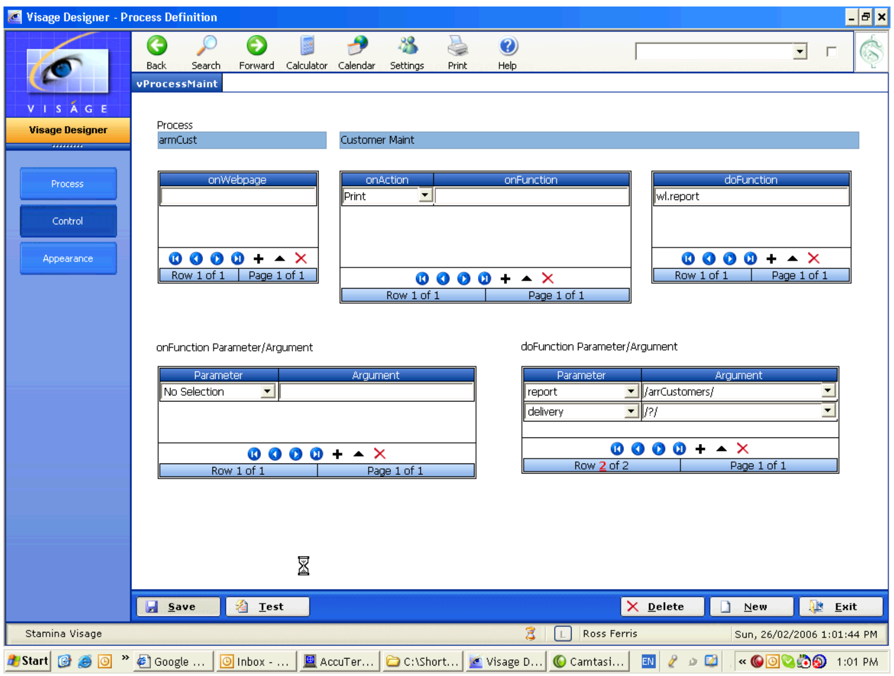


Figure 112: Enter a delivery Parameter to allow user to select Server Side or Client Side Printing

Save these changes.

Click the Test Button.

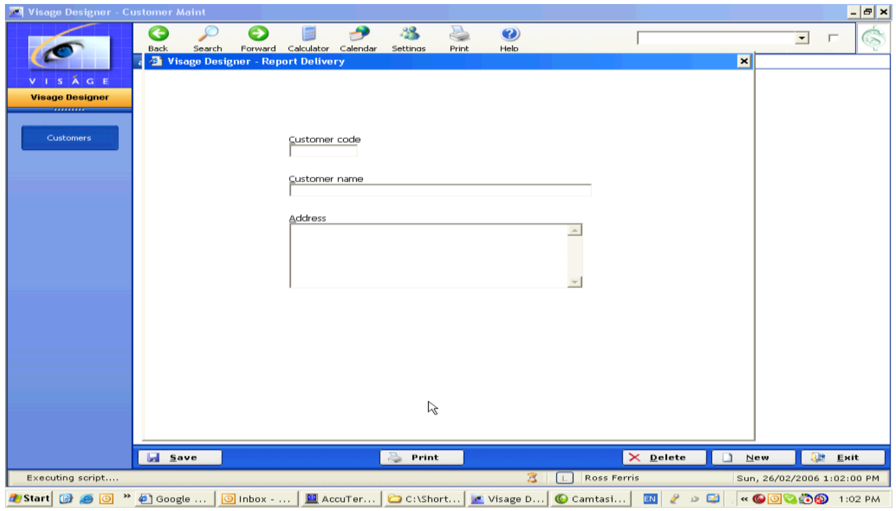


Figure 113: Generate Report to select all customers

Click Print Button

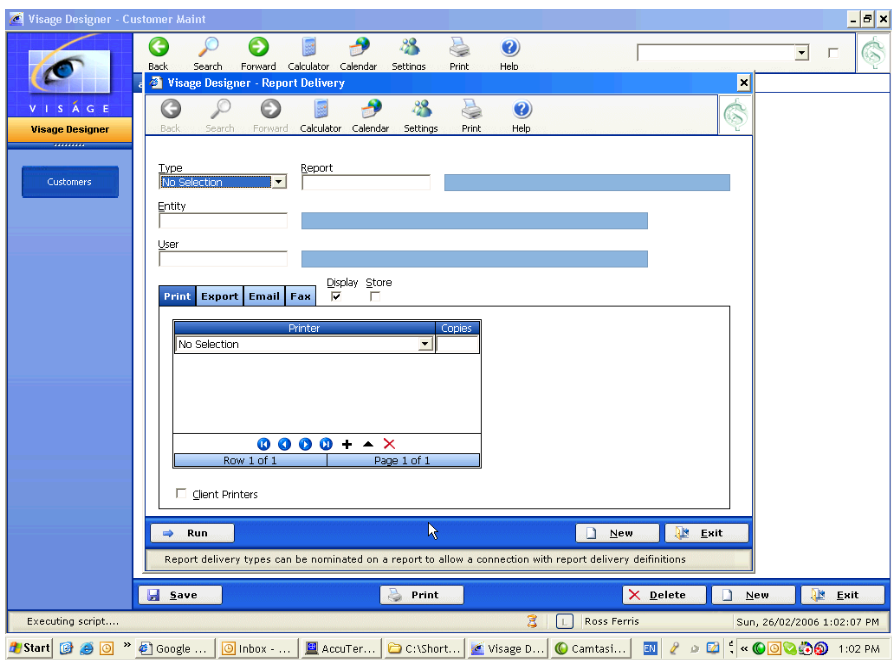


Figure 114: Select output options for printing report

Now, a dialog window appears with a number of choices for delivery of your report.
- Print, Export, Email, Fax, Display to Screen or Store.

Print

When selecting the Printer Option, the printers are those printers that are defined on the Report Server as distinct from the individual printers that have been set up from the initiating workstation previously.

When selecting the Printer from this dialog area the report generated will be a Server Side Report as distinct from a Client Side Report. The server side report is much faster. as a client side report that data is physically sent out to the client, the client then does the report manipulation and generation.   If the report is put out to the server, all the client gets is the finished report.

You can send this report to more than one printer by simply selecting a different printer in the drop down select list and changing numbers of copies if necessary.

Client Printers – Will give you additional options of Client printers in the drop down list as a choice of where to send the report.

Email

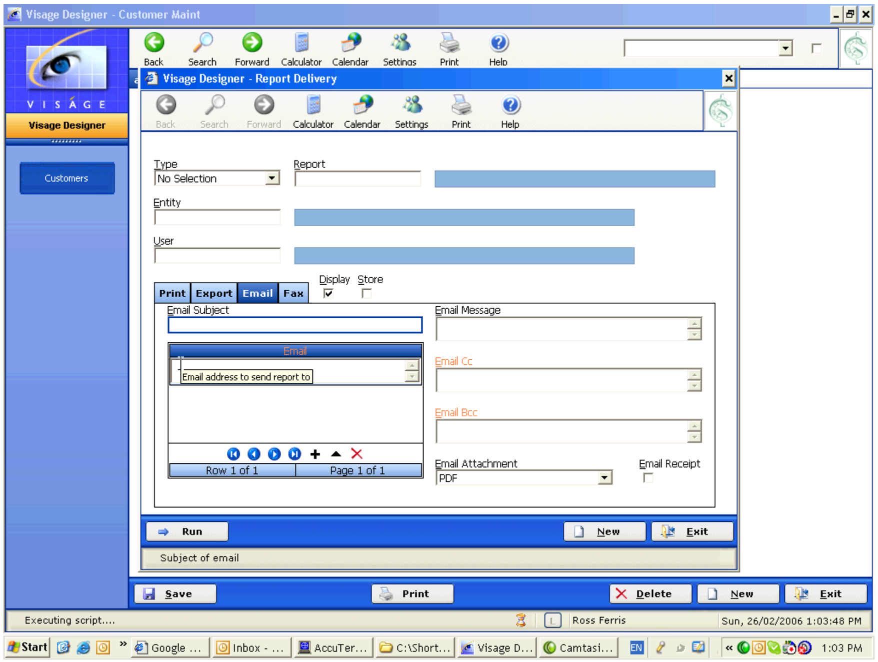


Figure 115: Output options for reports include email.

1. Enter Email subject.
2. Enter an email address
3. Enter an email message if you wish. If not leave this field blank.
4. Enter a cc email address if you want to send this report to more than one email address. If not leave this field blank.
5. Enter a bcc email address if you want to send this report to more than one email address and you do not wish the original email address to see that you have sent this report to any other email address. If not leave this field blank.
6. Select File Attachment Format.
7. Click Email Receipt check box if you wish to receive an email receipt. If not leave this check box unticked.
8. Click Run.

Fax

You can also send this report out to a fax

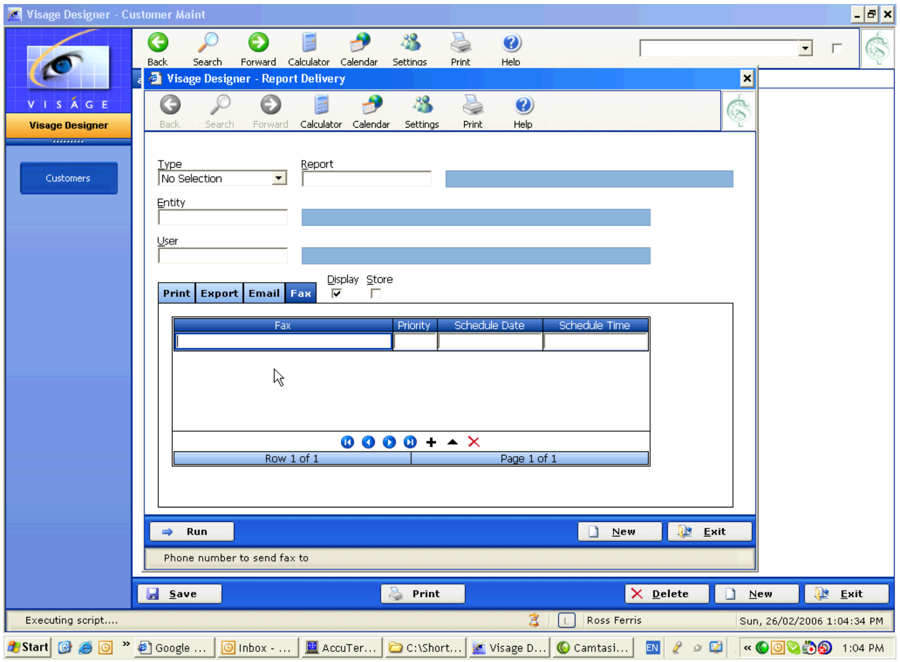


Figure 116: Output options for reports include fax.

1. Enter Fax Number
2. Enter Priority
3. Enter Scheduled Date if wish to schedule this fax.
4. Enter Scheduled Time if you wish to schedule a time this fax will be sent.
5. Click Run.

Display

By clicking on the Display check box, will also display this report to Screen when the Run button is clicked.

Multiple Destinations

You can select multiple Printers, and/or Faxes and/or Email addresses and/or Export destinations of where/when you want the report to be printed, faxed, emailed or exported.

When you have set up the multiple selections, simply click on the Run button. One pass through the system will send the report to multiple destinations.