

# USAS and D.U.C.K.

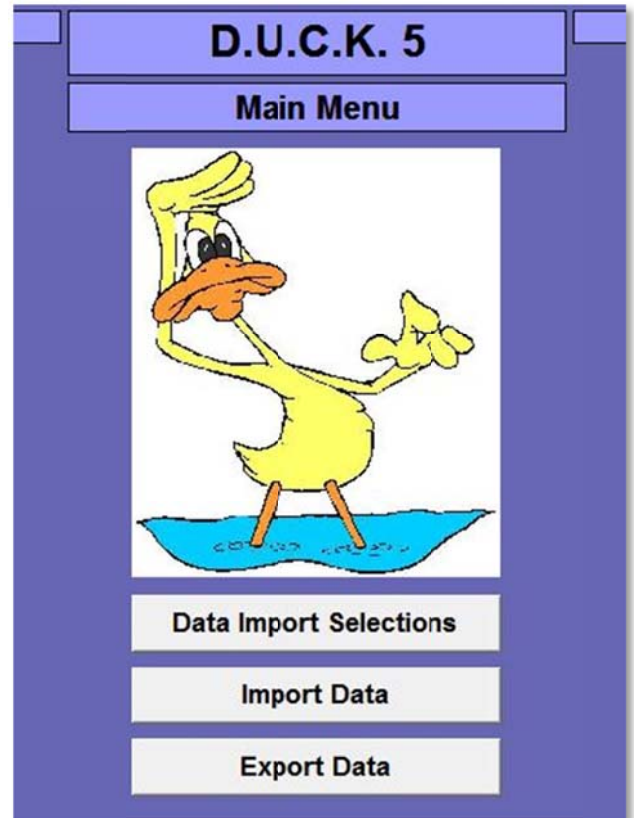
There are three buttons on the D.U.C.K. Main Menu.

**Data Import Selections** This screen is used to choose the source of the data and the fields to be downloaded. Criteria can also be specified to limit or filter the data that is collected by the remote server.

**Import Data** This screen is used to download the chosen data.

**Export Data** This screen is used to export data into Excel Spreadsheets or delimited files.

Help buttons exist throughout the utility to provide context sensitive assistance.



Before any data can be downloaded, a connection needs to be setup. Double-click the "D.U.C.K. 5" title at the top of the Main Menu to access the Setup screen.



Select the appropriate software, and then enter "CP" for the connection.

Click the door icon at the top-right of the screen to return to the Main Menu.

Connections	
Software	Connection
USAS	CP

## Data Import Selections

This is the Data Import Selections screen. This is where you can choose the fields to download, along with specifying any criteria to filter the data. The five boxes on the screen work like links in a chain. Something has to be selected in each box.

The [Summary Report] button will generate a report of what is selected in the top four boxes.

The [Detail Report] button will generate a report of everything that's selected in all five boxes, along with any criteria and data conversions.

The [Clear All] button will uncheck everything that's been selected in case you decide to start from scratch.

The [Search] button will open a screen that will allow you to enter a field name or partial field name, and then show you which definitions contain what you're searching for.

The two [Display Selected] buttons will toggle between showing you everything and only showing what's been selected.

The [Display fields by Field Name] button will toggle between displaying the fields alphabetically or by field number, which is how they appear in the definition on the server.

?
Summary Report
Detail Report

D.U.C.K. 5

Clear All
Search
🔍

Data Import Selections

Software	Import	Connection	Import	Dbase / Year	Import	USAS		Import	Combine
USAS	<input checked="" type="checkbox"/>	CP	<input checked="" type="checkbox"/>	<Current>	<input checked="" type="checkbox"/>	PO_HEADERS_REC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
USPS	<input type="checkbox"/>			2015	<input type="checkbox"/>	VENDOR_REC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
				2014	<input type="checkbox"/>				
				2013	<input type="checkbox"/>				
				2012	<input type="checkbox"/>				
				2011	<input type="checkbox"/>				
				2010	<input type="checkbox"/>				
				2009	<input type="checkbox"/>				
				2008	<input type="checkbox"/>				

De-Select All
De-Select All
De-Select All
De-Select All
Display All

Import	PO_HEADERS_REC	Criteria	Convert	Type	Length	Convert To	Size	Format
<input checked="" type="checkbox"/>	PURCHASE_ORDER_NO		<input type="checkbox"/>	Text	7		0	
<input checked="" type="checkbox"/>	PO_DATE		<input type="checkbox"/>	Date	6		0	
<input type="checkbox"/>	PO_YEAR	=2015	<input type="checkbox"/>	Long	4		0	
<input checked="" type="checkbox"/>	VENDOR_NO		<input type="checkbox"/>	Text	6		0	
<input checked="" type="checkbox"/>	AMOUNT		<input type="checkbox"/>	Double	8		0	
<input checked="" type="checkbox"/>	STATUS		<input type="checkbox"/>	Text	1		0	
<input checked="" type="checkbox"/>	AMOUNT_PAID		<input type="checkbox"/>	Double	8		0	
<input checked="" type="checkbox"/>	CHECK_NO		<input type="checkbox"/>	Long	4		0	

Select All
De-Select All
Display All
Delete All Criteria
Display fields by Field Name
?
Format Examples

The heading at the top of the definitions box indicates which software you're currently working with.

The heading at the top of the fields column indicates which definition you're currently working with.

You can choose fields from as many different data definitions as desired, and you can choose as many fields from each definition as you like.

**D.U.C.K. 5**

**Data Import Selections**

Software	Import	Connection	Import	Dbase / Year	Import	USAS	Import	Combine
USAS	<input checked="" type="checkbox"/>	CP	<input checked="" type="checkbox"/>	<Current>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
USPS	<input type="checkbox"/>			2015	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
				2014	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
				2013	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
				2012	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
				2011	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
				2010	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
				2009	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
				2008	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

Import	PO_HEADERS_REC	Criteria	Convert	Type	Length	Convert To	Size	Format
<input checked="" type="checkbox"/>	PURCHASE_ORDER_NO		<input type="checkbox"/>	Text	7		0	
<input checked="" type="checkbox"/>	PO_DATE		<input type="checkbox"/>	Date	6		0	
<input type="checkbox"/>	PO_YEAR	=2015	<input type="checkbox"/>	Long	4		0	
<input checked="" type="checkbox"/>	VENDOR_NO		<input type="checkbox"/>	Text	6		0	
<input checked="" type="checkbox"/>	AMOUNT		<input type="checkbox"/>	Double	8		0	
<input checked="" type="checkbox"/>	STATUS		<input type="checkbox"/>	Text	1		0	
<input checked="" type="checkbox"/>	AMOUNT_PAID		<input type="checkbox"/>	Double	8		0	
<input checked="" type="checkbox"/>	CHECK_NO		<input type="checkbox"/>	Long	4		0	

Summary Report    Detail Report    **D.U.C.K. 5**    Clear All    Search

**Data Import Selections**

Software	Import	Connection	Import	Dbase / Year	Import	USAS	Import	Combine
USAS	<input checked="" type="checkbox"/>	CP	<input checked="" type="checkbox"/>	<Current>	<input checked="" type="checkbox"/>	PENDING_INVS	<input type="checkbox"/>	<input type="checkbox"/>
USPS	<input type="checkbox"/>			2015	<input type="checkbox"/>	PO_DESC_REC	<input type="checkbox"/>	<input type="checkbox"/>
				2014	<input type="checkbox"/>	PO_HEADERS	<input type="checkbox"/>	<input type="checkbox"/>
				2013	<input type="checkbox"/>	PO_HEADERS_REC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
				2012	<input type="checkbox"/>	PO_ITEM_REC	<input type="checkbox"/>	<input type="checkbox"/>
				2011	<input type="checkbox"/>	PO_ITEMS	<input type="checkbox"/>	<input type="checkbox"/>
				2010	<input type="checkbox"/>	PURCHASE_ORDER	<input type="checkbox"/>	<input type="checkbox"/>
				2009	<input type="checkbox"/>	RCPT_DESC_REC	<input type="checkbox"/>	<input type="checkbox"/>
				2008	<input type="checkbox"/>	RECEIPT_REC	<input type="checkbox"/>	<input type="checkbox"/>

De-Select All    De-Select All    De-Select All    De-Select All    Display Selected

Import	PO_HEADERS_REC	Criteria	Convert	Type	Length	Convert To	Size	Format
<input type="checkbox"/>	PO_HEADER_KEY		<input type="checkbox"/>	Text	7	▼	0	
<input checked="" type="checkbox"/>	PURCHASE_ORDER_NO		<input type="checkbox"/>	Text	7	▼	0	
<input type="checkbox"/>	PO_HEADER_DESCRIPTION		<input type="checkbox"/>	Text	30	▼	0	
<input checked="" type="checkbox"/>	PO_DATE		<input type="checkbox"/>	Date	6	▼	0	
<input type="checkbox"/>	PO_YEAR		<input type="checkbox"/>	Long	4	▼	0	
<input type="checkbox"/>	PO_MO		<input type="checkbox"/>	Long	4	▼	0	
<input type="checkbox"/>	PO_DAY		<input type="checkbox"/>	Long	4	▼	0	
<input checked="" type="checkbox"/>	VENDOR_NO		<input type="checkbox"/>	Text	6	▼	0	
<input type="checkbox"/>	RECORD_DELETION_FLAG		<input type="checkbox"/>	Text	1	▼	0	
<input type="checkbox"/>	CHARGES_ON_PO		<input type="checkbox"/>	Long	4	▼	0	
<input checked="" type="checkbox"/>	AMOUNT		<input type="checkbox"/>	Double	8	▼	0	
<input checked="" type="checkbox"/>	STATUS		<input type="checkbox"/>	Text	1	▼	0	
<input checked="" type="checkbox"/>	AMOUNT_PAID		<input type="checkbox"/>	Double	8	▼	0	
<input type="checkbox"/>	AMOUNT_FILLED		<input type="checkbox"/>	Double	8	▼	0	
<input checked="" type="checkbox"/>	CHECK_NO		<input type="checkbox"/>	Long	4	▼	0	
<input type="checkbox"/>	REQUISITION_NO		<input type="checkbox"/>	Text	8	▼	0	

Select All    De-Select All    Display Selected    Delete All Criteria    Display fields by Field Name    Format Examples

To enter criteria, double-click the criteria field next to the field you would like to specify criteria.

More than one criterion can be entered for a single field.

PO_HEADERS_REC	PO_YEAR
Operation	Value
equals	2015
And    Or	
And    Or	

Click the door icon to close the criteria editor.

Summary Report    Detail Report    **D.U.C.K. 5**    Clear All    Search

**Data Import Selections**

Software	Import	Connection	Import	Dbase / Year	Import	USAS	Import	Combine
USAS	<input checked="" type="checkbox"/>	CP	<input checked="" type="checkbox"/>	<Current>	<input checked="" type="checkbox"/>	PO_HEADERS_REC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
USPS	<input type="checkbox"/>			2015	<input type="checkbox"/>	VENDOR_REC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
				2014	<input type="checkbox"/>			
				2013	<input type="checkbox"/>			
				2012	<input type="checkbox"/>			
				2011	<input type="checkbox"/>			
				2010	<input type="checkbox"/>			
				2009	<input type="checkbox"/>			
				2008	<input type="checkbox"/>			

De-Select All    De-Select All    De-Select All    De-Select All    Display All

Import	PO_HEADERS_REC	Criteria	Convert	Type	Length	Convert To	Size	Format
<input checked="" type="checkbox"/>	PURCHASE_ORDER_NO		<input type="checkbox"/>	Text	7	▼	0	
<input checked="" type="checkbox"/>	PO_DATE		<input type="checkbox"/>	Date	6	▼	0	
<input type="checkbox"/>	PO_YEAR	=2015	<input type="checkbox"/>	Long	4	▼	0	
<input checked="" type="checkbox"/>	VENDOR_NO		<input type="checkbox"/>	Text	6	▼	0	
<input checked="" type="checkbox"/>	AMOUNT		<input type="checkbox"/>	Double	8	▼	0	
<input checked="" type="checkbox"/>	STATUS		<input type="checkbox"/>	Text	1	▼	0	
<input checked="" type="checkbox"/>	AMOUNT_PAID		<input type="checkbox"/>	Double	8	▼	0	
<input checked="" type="checkbox"/>	CHECK_NO		<input type="checkbox"/>	Long	4	▼	0	

Select All    De-Select All    Display All    Delete All Criteria    Display fields by Field Name    Format Examples

An abbreviated version of the criteria entered will be displayed.

We're also going to import fields from the VENDOR\_REC definition.

Import	VENDOR_REC	Criteria	Convert	Type	Length	Convert To	Size	Format
<input checked="" type="checkbox"/>	VENDOR_NO		<input type="checkbox"/>	Long	4	▼	0	
<input checked="" type="checkbox"/>	NAME_1		<input type="checkbox"/>	Text	30	▼	0	
<input checked="" type="checkbox"/>	ADDRESS_1		<input type="checkbox"/>	Text	30	▼	0	
<input checked="" type="checkbox"/>	ADDRESS_2		<input type="checkbox"/>	Text	30	▼	0	
<input checked="" type="checkbox"/>	CITY		<input type="checkbox"/>	Text	20	▼	0	
<input checked="" type="checkbox"/>	STATE		<input type="checkbox"/>	Text	15	▼	0	
<input checked="" type="checkbox"/>	ZIP_CODE		<input type="checkbox"/>	Text	10	▼	0	

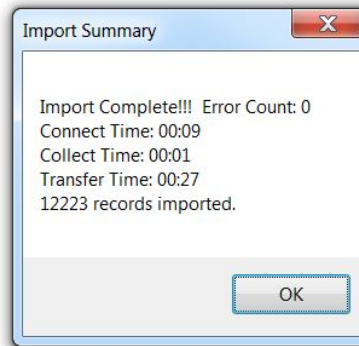
## Import Data

To import the data, enter your Username and Password, and then click the [Import Data] button.

You can also limit the amount of data downloaded by clicking the checkbox towards the top of the screen and entering the number of records to be downloaded. This feature is useful for experimenting when large amounts of data will be downloaded.

The screenshot shows the 'D.U.C.K. 5' web interface for importing data. At the top, there is a header 'D.U.C.K. 5' and a sub-header 'Import Data'. Below this, a 'Last Import' status bar shows '2/19/2015 12:50:42 PM'. A checkbox labeled 'Only download the first' is followed by an input field containing '0' and the text 'records of each table.'. Below this are three input fields: 'Server' with the value 'HCCA1', 'Username', and 'Password'. At the bottom, there are two buttons: 'Import Data' and 'View Error Log'.

A summary of the data downloaded will be displayed.



## Export Data

The Export Data utility allows you to export any table or query into an Excel Spreadsheet or a delimited file.

This is useful for loading data into other applications.

The screenshot shows the 'D.U.C.K. 5' web interface for exporting data. At the top, there is a header 'D.U.C.K. 5' and a sub-header 'Export Data'. Below this is a dropdown menu labeled 'Select Table or Query to Export' with the value 'PO\_HEADERS\_REC'. Below the dropdown is a section for 'Select Version' with a dropdown menu showing 'Excel 2007/2010 (XLSX)'. Below this are two buttons: 'Export To Excel' and 'Open With Excel'. Below these is a section for 'Export Type' with radio buttons for 'Comma' (selected) and 'Tab'. Below this are three sections, each with radio buttons: 'Include Field Names?' with 'No' (selected) and 'Yes'; 'Delimit Fields w/Quotes?' with 'No' (selected) and 'Yes'; and 'Select Filename Extension' with '.CSV' (selected) and '.TXT'. At the bottom, there are two buttons: 'Export' and 'Open With Notepad'.

## Create a Query

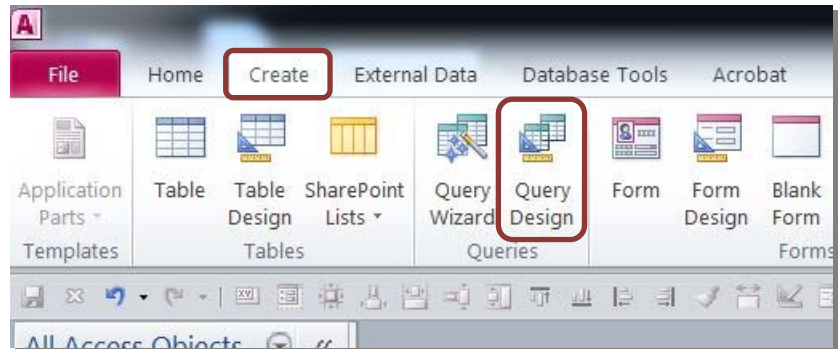
One of the strengths of Access is the ability to “join” multiple sources of data and create new sets of data. The following example will demonstrate how to join two tables on a common field and create a new set of data.

Let’s create a query that includes fields from the “PO\_HEADERS\_REC” and “VENDOR\_REC” tables. The common field in both tables is the “VENDOR\_NO” field.

Import	PO_HEADERS_REC	Criteria	Convert	Type	Length	Convert To	Size	Format
<input checked="" type="checkbox"/>	PURCHASE_ORDER_NO		<input type="checkbox"/>	Text	7		0	
<input checked="" type="checkbox"/>	PO_DATE		<input type="checkbox"/>	Date	6		0	
<input type="checkbox"/>	PO_YEAR	=2015	<input type="checkbox"/>	Long	4		0	
<input checked="" type="checkbox"/>	VENDOR_NO		<input type="checkbox"/>	Text	6		0	
<input checked="" type="checkbox"/>	AMOUNT		<input type="checkbox"/>	Double	8		0	
<input checked="" type="checkbox"/>	STATUS		<input type="checkbox"/>	Text	1		0	
<input checked="" type="checkbox"/>	AMOUNT_PAID		<input type="checkbox"/>	Double	8		0	
<input checked="" type="checkbox"/>	CHECK_NO		<input type="checkbox"/>	Long	4		0	

Import	VENDOR_REC	Criteria	Convert	Type	Length	Convert To	Size	Format
<input checked="" type="checkbox"/>	VENDOR_NO		<input type="checkbox"/>	Long	4		0	
<input checked="" type="checkbox"/>	NAME_1		<input type="checkbox"/>	Text	30		0	
<input checked="" type="checkbox"/>	ADDRESS_1		<input type="checkbox"/>	Text	30		0	
<input checked="" type="checkbox"/>	ADDRESS_2		<input type="checkbox"/>	Text	30		0	
<input checked="" type="checkbox"/>	CITY		<input type="checkbox"/>	Text	20		0	
<input checked="" type="checkbox"/>	STATE		<input type="checkbox"/>	Text	15		0	
<input checked="" type="checkbox"/>	ZIP_CODE		<input type="checkbox"/>	Text	10		0	

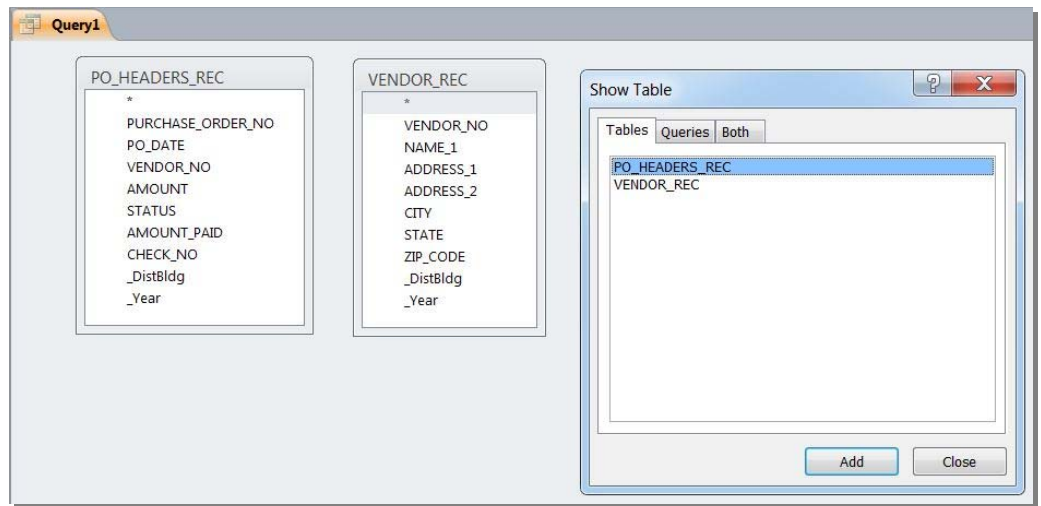
Click the “Create” tab, and then select the “Query Design” option.



Select each table and click the [Add] button.

The tables will appear in the query editor.

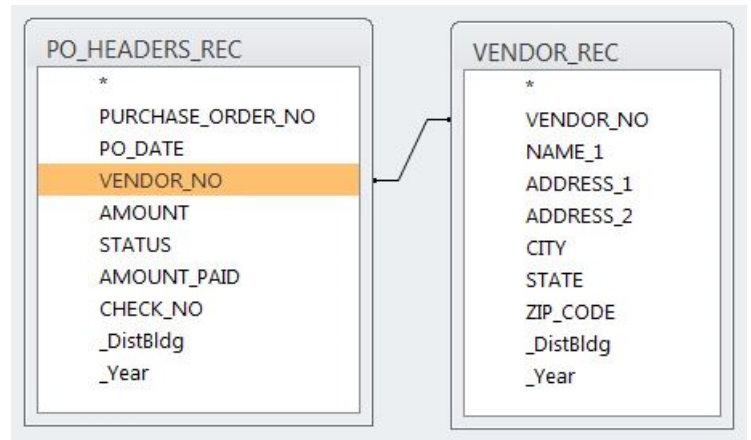
Click the [Close] button.



Now, join the two tables on the common “VENDOR\_NO” field.

To do this, click-n-drag the “VENDOR\_NO” field in the “PO\_HEADERS\_REC” table, and drop it on the “VENDOR\_NO” field in the “VENDOR\_REC” table.

A line will connect the two tables, illustrating that they’re joined.

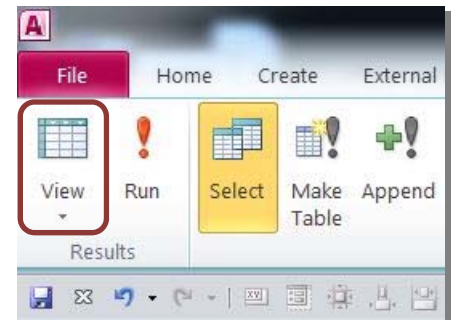


Now add the desired fields to the field list below. You can either click-n-drag the fields from the tables to the grid, or you can double-click each field to add it.

The screenshot shows a query editor window titled "Query1". It displays two tables, "PO\_HEADERS\_REC" and "VENDOR\_REC", joined together. The "VENDOR\_NO" field in "PO\_HEADERS\_REC" is highlighted in orange. Below the tables is a field list grid with the following columns and rows:

Field:	PURCHASE_ORDER_NO	PO_DATE	AMOUNT	STATUS	AMOUNT_PAID	CHECK_NO	VENDOR_NO	NAME_1	ADDRESS_1	ADDRESS_2	CITY	STATE	ZIP_CODE
Table:	PO_HEADERS_REC	PO_HEADERS_REC	PO_HEADERS_REC	PO_HEADERS_REC	PO_HEADERS_REC	PO_HEADERS_REC	VENDOR_REC	VENDOR_REC	VENDOR_REC	VENDOR_REC	VENDOR_REC	VENDOR_REC	VENDOR_REC
Sort:													
Show:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Criteria:													

Click the “View” icon to run the query and display the new recordset of data.





Oops!



This error occurred because the “data type” of the “VENDOR\_NO” field in the “PO\_HEADERS\_REC” table does not match the data type of the “VENDOR\_NO” field in the “VENDOR\_REC” table. The “VENDOR\_NO” field in the “PO\_HEADERS\_REC” table is a 6 character, zero filled text field. The “VENDOR\_NO” field in the “VENDOR\_REC” table is a numeric field.

PO_HEADERS_REC			
PURCHASE_ORDER_NO	PO_DATE	VENDOR_NO	AMOUNT
1400005	7/31/2013	000005	
1400006	7/31/2013	000006	16
1400007	7/31/2013	000007	
1400008	7/31/2013	000008	3
1400009	7/31/2013	000009	12

VENDOR_REC		
VENDOR_NO	NAME_1	
1	Coleman, Felicia	2556 K
2	A Test Vendor	1234 M
3	MERRITT, TARA	6024 H
4	HOWARD-WOODARD, SHERRY	557 W
5	Abbatiello, Patti M	3412 D

Import	PO_HEADERS_REC	Criteria	Convert	Type	Length	Convert To	Size	Format
<input checked="" type="checkbox"/>	PURCHASE_ORDER_NO	>= '1000' and <= '2000'	<input type="checkbox"/>	Text	7		0	
<input checked="" type="checkbox"/>	PO_DATE		<input type="checkbox"/>	Date	6		0	
<input checked="" type="checkbox"/>	VENDOR_NO		<input type="checkbox"/>	Text	6		0	
<input checked="" type="checkbox"/>	AMOUNT		<input type="checkbox"/>	Double	8		0	
<input checked="" type="checkbox"/>	STATUS		<input type="checkbox"/>	Text	1		0	
<input checked="" type="checkbox"/>	AMOUNT_PAID		<input type="checkbox"/>	Double	8		0	
<input checked="" type="checkbox"/>	CHECK_NO		<input type="checkbox"/>	Long	4		0	

Import	VENDOR_REC	Criteria	Convert	Type	Length	Convert To	Size	Format
<input checked="" type="checkbox"/>	VENDOR_NO		<input type="checkbox"/>	Long	4		0	
<input checked="" type="checkbox"/>	NAME_1		<input type="checkbox"/>	Text	30		0	
<input checked="" type="checkbox"/>	ADDRESS_1		<input type="checkbox"/>	Text	30		0	
<input checked="" type="checkbox"/>	ADDRESS_2		<input type="checkbox"/>	Text	30		0	
<input checked="" type="checkbox"/>	CITY		<input type="checkbox"/>	Text	20		0	
<input checked="" type="checkbox"/>	STATE		<input type="checkbox"/>	Text	15		0	
<input checked="" type="checkbox"/>	ZIP_CODE		<input type="checkbox"/>	Text	10		0	

It's D.U.C.K. to the rescue!!!

The “Convert” feature in the Data Import Selections screen allows you to convert fields from one data type to another as the data is downloaded.

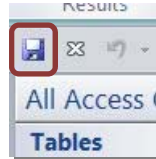
Back in the “Data Import Selections” screen, click the Convert checkbox of the “VENDOR\_NO” field, then select the “Text” data type in the Convert To column, set the size to “6”, and enter six zeroes in the Format column.

Import	VENDOR_REC	Criteria	Convert	Type	Length	Convert To	Size	Format
<input checked="" type="checkbox"/>	VENDOR_NO		<input checked="" type="checkbox"/>	Text	6	Text	6	000000
<input checked="" type="checkbox"/>	NAME_1		<input type="checkbox"/>	Text	30		0	
<input checked="" type="checkbox"/>	ADDRESS_1		<input type="checkbox"/>	Text	30		0	
<input checked="" type="checkbox"/>	ADDRESS_2		<input type="checkbox"/>	Text	30		0	
<input checked="" type="checkbox"/>	CITY		<input type="checkbox"/>	Text	20		0	
<input checked="" type="checkbox"/>	STATE		<input type="checkbox"/>	Text	15		0	
<input checked="" type="checkbox"/>	ZIP_CODE		<input type="checkbox"/>	Text	10		0	

After making this change, download the data again, and then the query will work properly.

PURCHASE_ORDER_NO	PO_DATE	AMOUNT	STATUS	AMOUNT_PAID	CHECK_NO	VENDOR_NO	NAME_1	ADDRESS_1	ADDRESS_2	CITY	STATE	ZIP_CODE
1403511	6/24/2014	244.57	4	244.57	834234	000001	Coleman, Felicia	2556 Kipling Avenue		Cincinnati	OH	45239
1403355	6/24/2014	244.57	4	244.57	834234	000001	Coleman, Felicia	2556 Kipling Avenue		Cincinnati	OH	45239
1403969	6/24/2014	244.57	4	244.57	834890	000003	MERRITT, TARA	6024 HAMMEL AVE		Cincinnati	OH	45237
1403394	6/24/2014	244.57	4	244.57	834400	000004	HOWARD-WOODARD, SHERRY	557 W LIBERTY ST	Apt 201	Cincinnati	OH	45214
1400005	7/31/2013	83.11	4	83.11	820479	000005	Abbateiello, Patti M	3412 Driftwood Circle		Cincinnati	OH	45239
1400006	7/31/2013	1691.72	4	1691.72	820480	000006	Abrolat, Richard G	2813 Silo Lane		Villa Hills	KY	41017
1400007	7/31/2013	396.8	4	396.8	820481	000007	Adair, Lisa Kay	8266 Gourmet Lane		Loveland	OH	45140

Save the query by clicking the Save icon.



Name the query "PO\_HEADERS\_VENDORS"

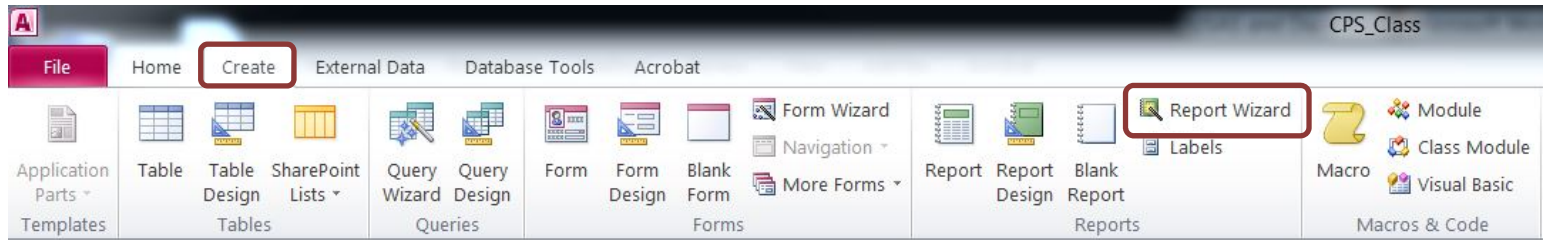
The new query is now visible in the list of Objects.



## Create a Report

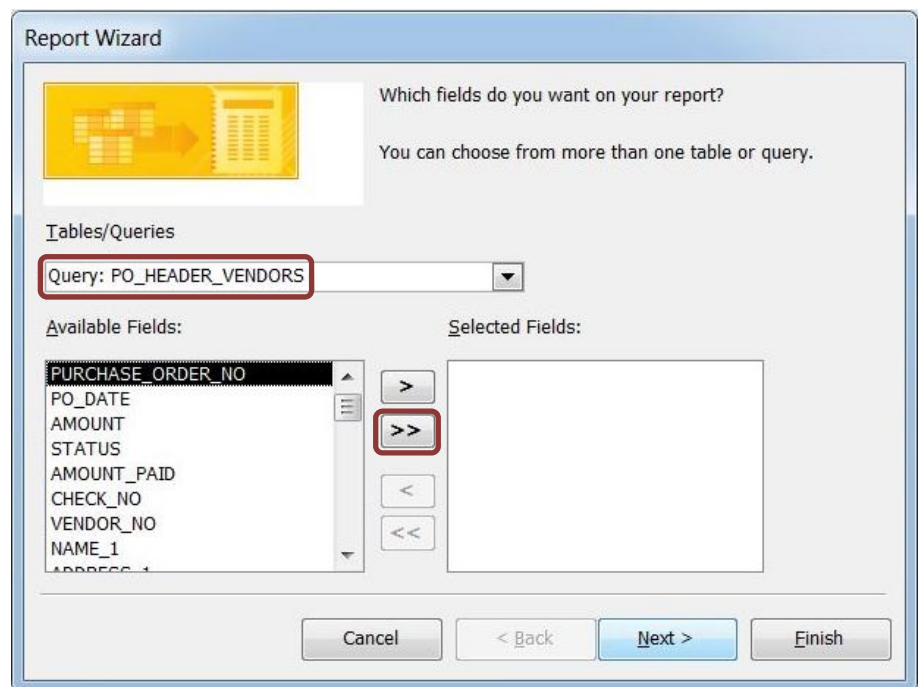
Access contains “Wizards” that simplify creating queries, forms, and reports. The wizards will prompt for various pieces of information, and then create the object. In most cases, the reports generated aren’t very pretty, but they’ll provide a good starting point. After the report has been generated, it can be opened with an editor and modified as needed.

Click the “Report Wizard” under the “Create” tab to begin the process.



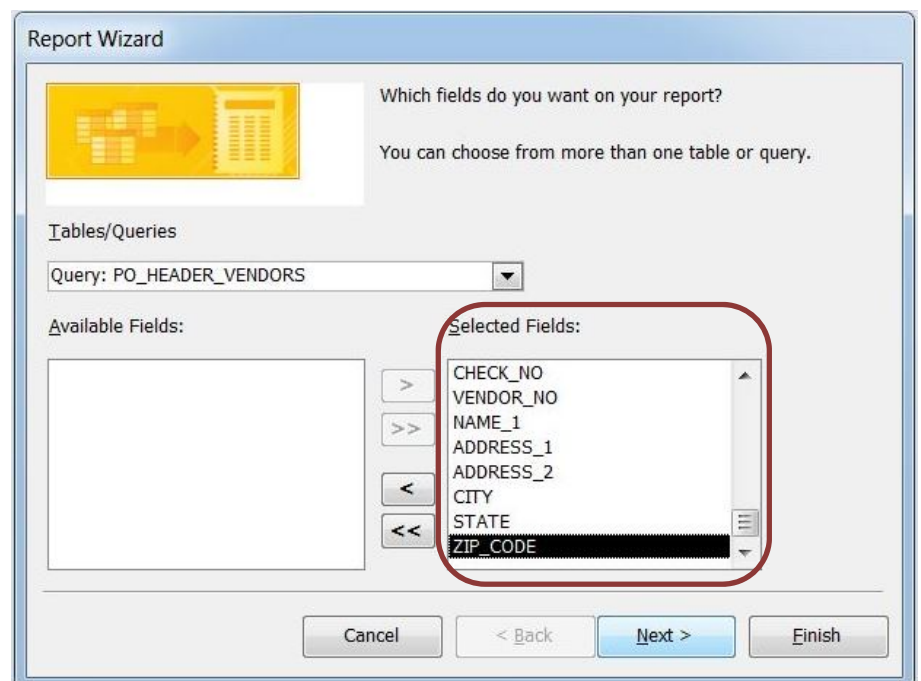
In the first screen, you’ll be prompted for the source of the data. For this example, we’ll use the “PO\_HEADER\_VENDORS” query created earlier.

Click the [>>] button to select all of the fields.



All of the fields should now appear in the “Selected Fields” pane.

Click [Next].



The data can be broken out by one or more groups to make the report easier to read.

For this example, we'll select the "VENDOR\_NO" field and click the [>] button.

The wizard shows an example of how it will look.

Click [Next].

Report Wizard

Do you want to add any grouping levels?

PURCHASE\_ORDER\_NO  
PO\_DATE  
AMOUNT  
STATUS  
AMOUNT\_PAID  
CHECK\_NO  
NAME\_1  
ADDRESS\_1  
ADDRESS\_2  
CITY

>  
<  
Priority  
↓

VENDOR\_NO

PURCHASE\_ORDER\_NO, PO\_DATE, AMOUNT, STATUS, AMOUNT\_PAID, CHECK\_NO, NAME\_1, ADDRESS\_1, ADDRESS\_2, CITY, STATE, ZIP\_CODE

Grouping Options ... Cancel < Back Next > Finish

One or more sort options can be chosen.

Select the "PO\_Date" for the first sort option.

Click the [Summary Options ...] button to add subtotals to the report.

Report Wizard

What sort order and summary information do you want for detail records?

You can sort records by up to four fields, in either ascending or descending order.

1 PO\_DATE Ascending  
2 Ascending  
3 Ascending  
4 Ascending

Summary Options ...

Cancel < Back Next > Finish

Select "Sum" for the "AMOUNT" and "AMOUNT\_PAID" fields.

Click [OK].

Summary Options

What summary values would you like calculated?

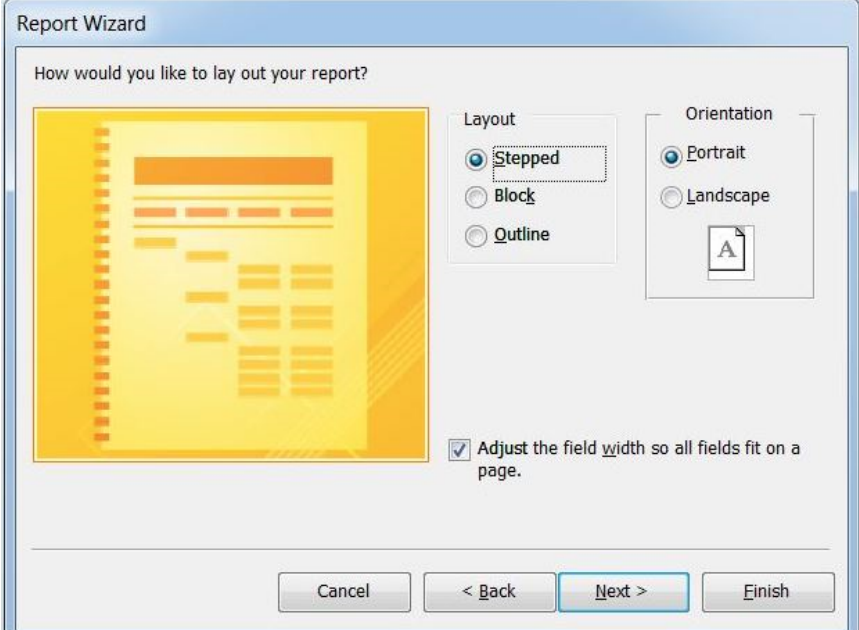
Field	Sum	Avg	Min	Max
AMOUNT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AMOUNT_PAID	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CHECK_NO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

OK  
Cancel

Show  
 Detail and Summary  
 Summary Only  
 Calculate percent of total for sums

The overall layout of the report along with the page orientation can be chosen here.

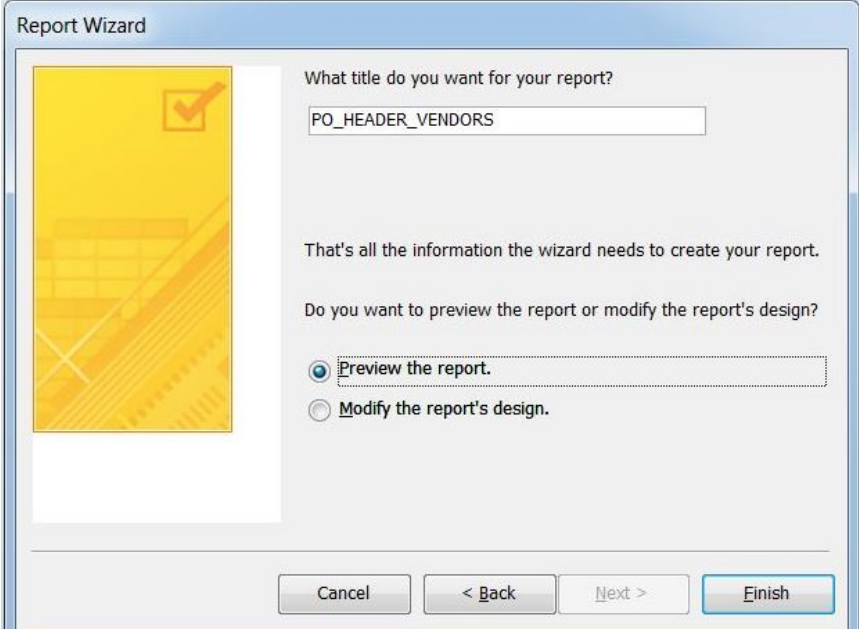
Click [Next] to use the defaults.



The screenshot shows the 'Report Wizard' dialog box with the title 'Report Wizard'. The main question is 'How would you like to lay out your report?'. On the left is a preview of a report page with a yellow background and a grid of data. To the right, under 'Layout', there are three radio buttons: 'Stepped' (selected), 'Block', and 'Outline'. Under 'Orientation', there are two radio buttons: 'Portrait' (selected) and 'Landscape'. Below these is a checkbox labeled 'Adjust the field width so all fields fit on a page.' which is checked. At the bottom are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

The Wizard uses the name of the data source for the name of the report by default.

Click [Finish] to use the defaults.



The screenshot shows the 'Report Wizard' dialog box with the title 'Report Wizard'. The main question is 'What title do you want for your report?'. On the left is a preview of a report page with a yellow background and a grid of data, with a checkmark icon in the top right corner. To the right, there is a text input field containing 'PO\_HEADER\_VENDORS'. Below this, there is a message: 'That's all the information the wizard needs to create your report.' followed by the question 'Do you want to preview the report or modify the report's design?'. There are two radio buttons: 'Preview the report.' (selected) and 'Modify the report's design.'. At the bottom are four buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

As mentioned, the report generated by the Wizard isn't a thing of beauty, but it provides a good starting point.

# PO\_HEADER\_VENDORS1

VENDOR_NO	PO_DATE	PURCHASE_ORDER_NO	AMOUNT	STATUS	CHECK_NO	NAME_1	ADDRESS_1	ADDRESS_2	CITY	STATE
000822		##### 1500386	280	3	280	##### Roberta A We	1503 Van Blar		Cincinnati	OH

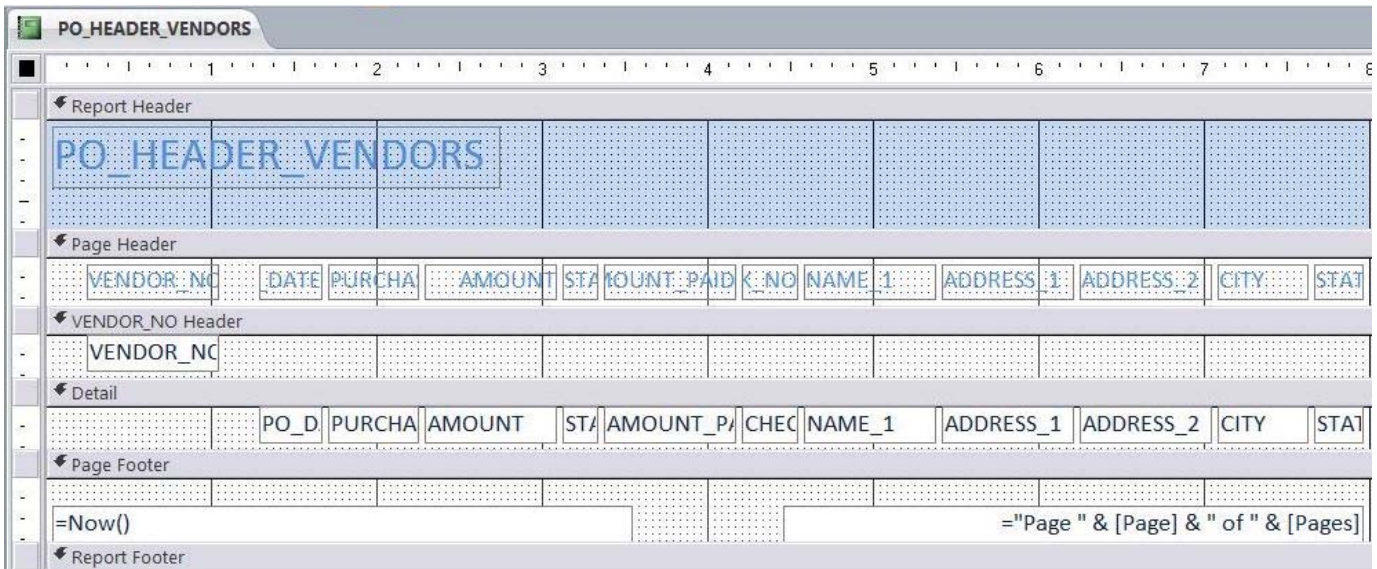
Summary for 'VENDOR\_NO' = 000822 (1 detail record)

Sum	280	280
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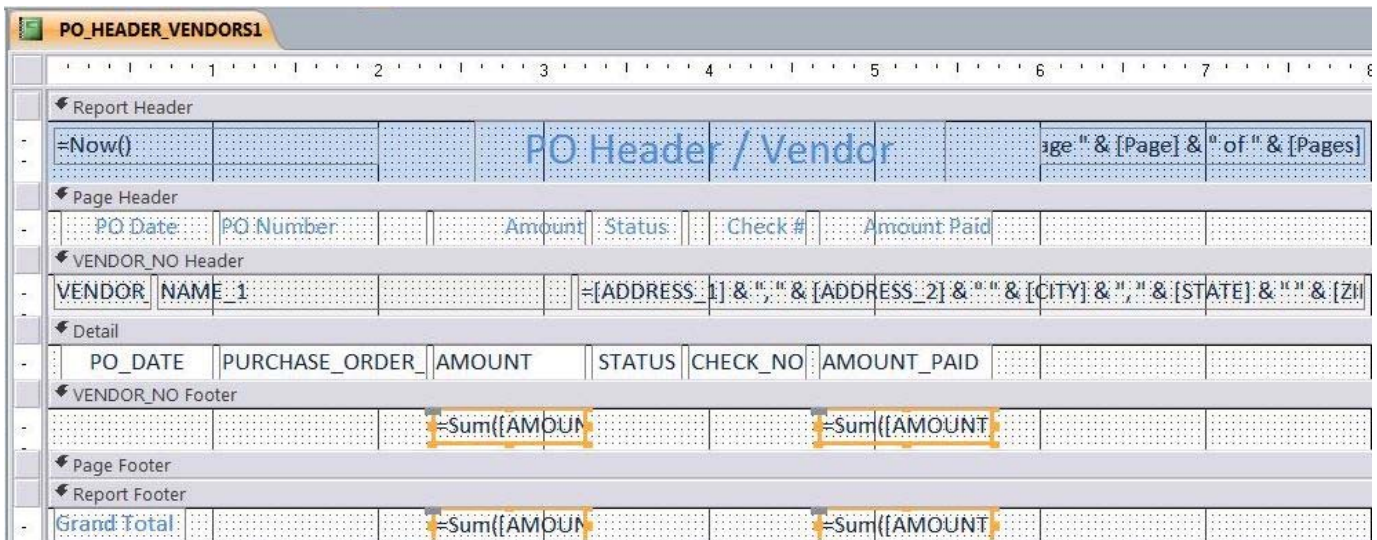
Click the [Close Print Preview] button...



... and the report will be opened in the Design editor.



Fields can be moved around, fonts changed, background colors altered, etc.

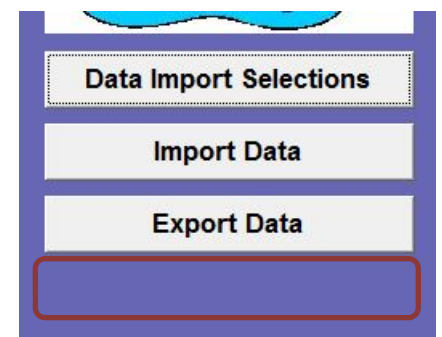


Much better!

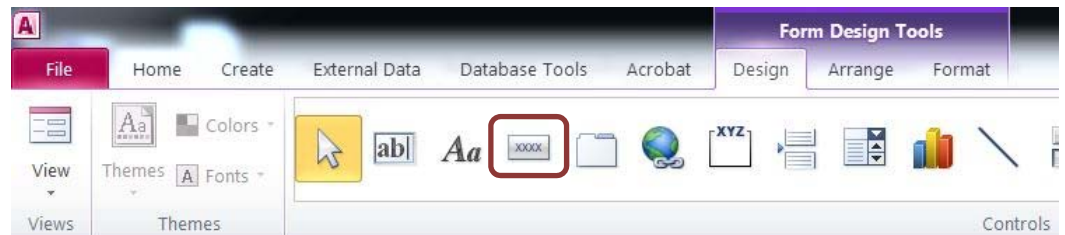
PO Date	P.O. Number	Amount	Status	Amount Paid	Check #
100052	IBEW Local 212 - PAYROLL	212 Crown Point Pl #101, Cincinnati, OH 45241			
1/15/2015	9124721	497.04	4	497.04	842657
2/13/2015	9124790	745.56	4	745.56	843751
		<u>1242.6</u>		<u>1242.6</u>	
100053	Plumbers Pipefitters - PAYROLL	1228 Central Parkway Rm 200, Cincinnati, OH 45210			
1/15/2015	9124720	685.56	4	685.56	842736
2/13/2015	9124789	829.71	4	829.71	843793
		<u>1515.27</u>		<u>1515.27</u>	

## Add the report to the Main Menu

For the final touch, we'll add a button to the Main Menu that will open the new report in Preview mode.



Click the Button control...

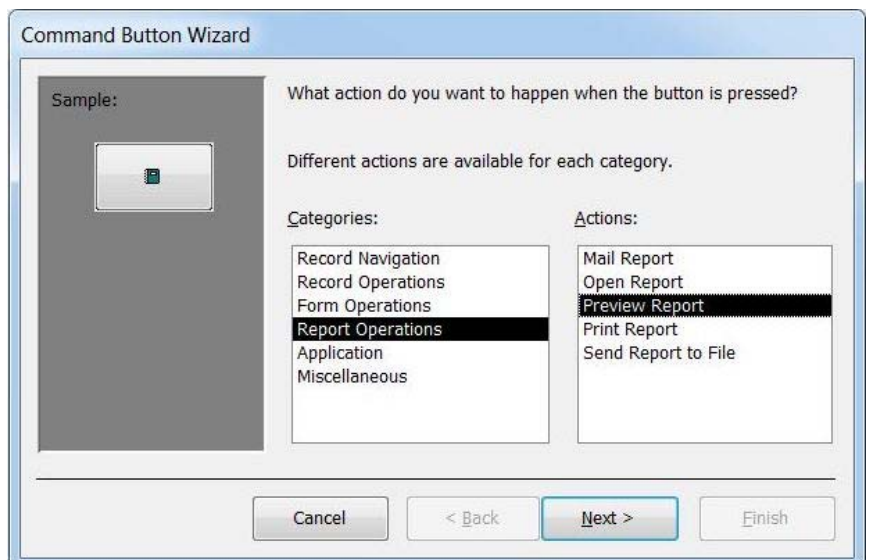


Click-n-drag a rectangle on the form where you want the button positioned.

When you release the mouse button, the Command Button Wizard will open.

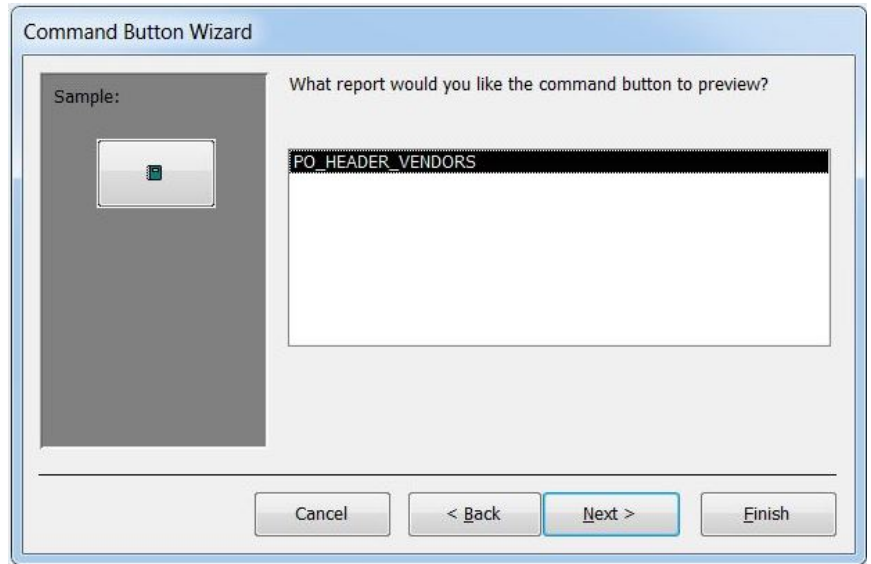
Select "Report Operations" and "Preview Report".

Click [Next].



Select the "PO\_HEADER\_VENDORS" report.

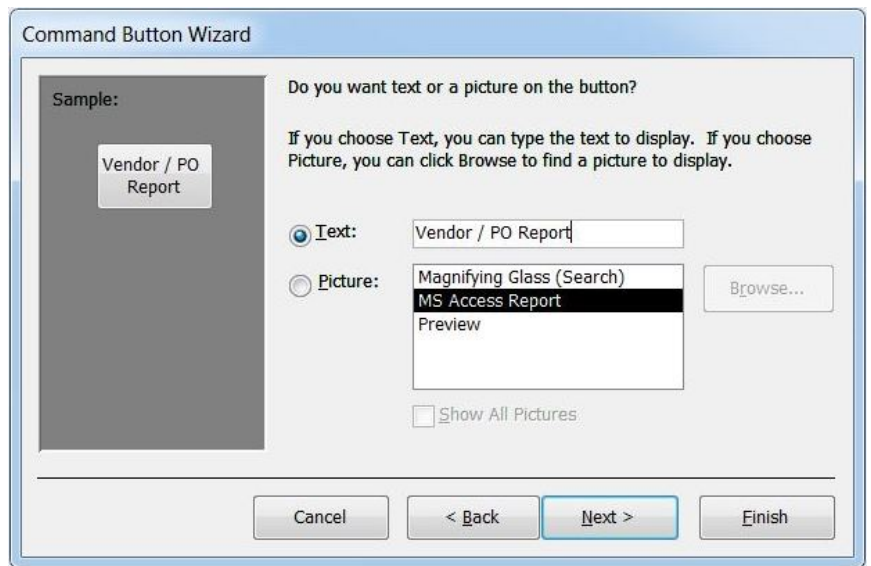
Click [Next].



You can choose between having an icon displayed on the button, or text.

Since the other buttons display text labels, enter "Vendor / PO Report" in the Text field.

Click [Next].



The Wizard generates a generic name for the button.

Leave it as-is and click [Finish].

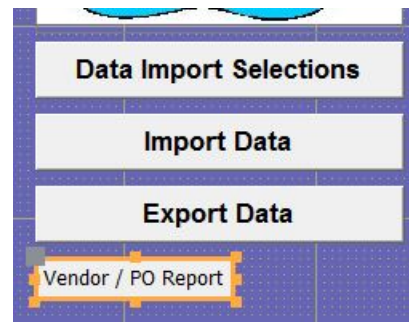




The new button will be displayed on the form.

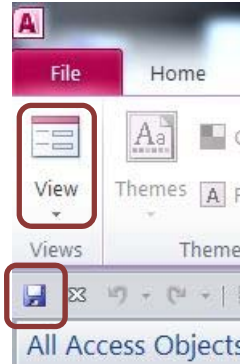
Manually resize the button to match the existing buttons.

Change the font to match the other buttons as well.

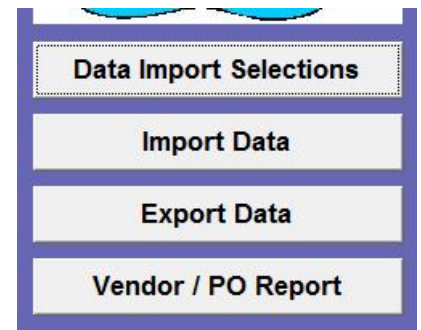


Click the disk icon to save the changes.

Click the [View] button to run the form.



Click the new [Vendor / PO Report] button and the new report will be opened in Print Preview mode.



I heavily recommend setting the button to open the report in "Print Preview" mode as opposed to "Print Report" mode. The reason is that if the "Print Report" mode is used, the report is instantly sent to the printer. "Print Preview" mode displays the report to the screen first and allow you to send it to the printer if desired. This can prevent wasting a lot of paper if a button is clicked accidentally!

Many reports can be created and added to a menu, making them easy to access.