THE SYSTEMS HOUSE
MASTER DISTRIBUTION DOCUMENTATION

T A B L E   O F   C O N T E N T S

RECALL GENERATOR

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┌────────────────────────────────────────────────────────────────────┐
│ ◖ .\concord.ini                                          _ ☐ ✕     │
├────────────────────────────────────────────────────────────────────┤
│ File  Edit  Settings  File Transfer                                  │
│         Account:BASE.10           Port: 52 Menu:RECALL.GEN           │
│                                                                      │
│                     Recall Generator Selector                        │
│                     ─────────────────────────                        │
│                                                                      │
│                                                                      │
│          1.Create or Maintain Recall Reports                         │
│                                                                      │
│          2.Run a Recall Report On File                               │
│                                                                      │
│          3.Print A Report of Recall Programs On File                 │
│                                                                      │
│          4.English Generator Flatfile Creation                       │
│                                                                      │
│                                                                      │
│                                                                      │
│                                                                      │
│                   Enter Selection or END :                           │
│                                                                      │
├────────────────────────────────────────────────────────────────────┤
│ │ OE  │ │ VE  │ │MAINT│ │EMAIL│ │AUDIT│       │CAPT ON│ │VIEW │ │Br││
│ │HELP │ │END  │ │INSERT││LDELETE││PREV PG││NEXT PG││INQUIRY││ABORT││k ││
└────────────────────────────────────────────────────────────────────┘
```
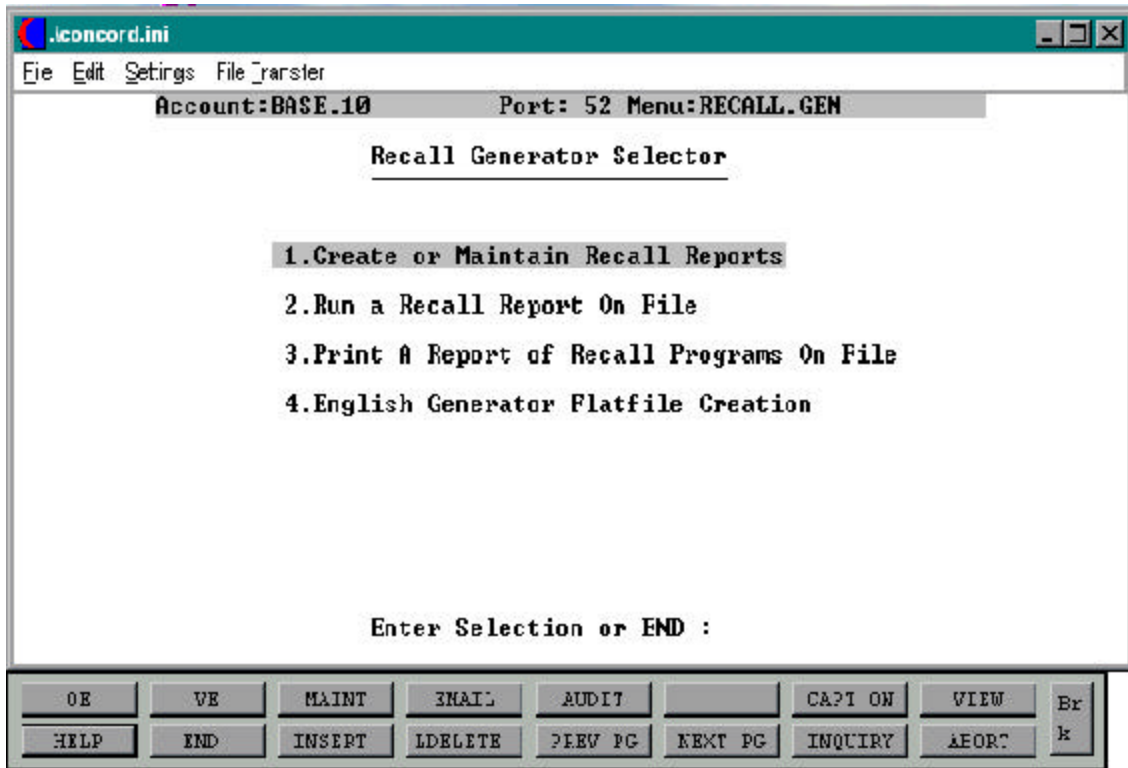
DICTIONARY USE AND OVERVIEW

Before using the Recall Generator Program it is important to have a basic knowledge of dictionary items, attributes, etc., as these are used throughout this section of the documentation.

Let's say you wish to write a report which contains information in the Customer Master file. The first step you would take is to print a dictionary listing of the file to see the attributes (fields where data is stored in the file). To print the file, use the following command:

C file name LPTR

For the Customer Master file, you will type:

C CUST.MAST   OR   C CUST.MAST LPTR

Typing "LPTR" at the end of the file name will send the listing to the printer or to a hold spool, depending on your printer assignment. If LPTR is left off the command line the listing will be spooled directly to the CRT. If you are using dictionaries for the first time it may be easier to print them and have them handy when using Recall Generator Program.

Below are some examples of dictionary listing for the Customer Master file (CUST.MAST). Keep them handy to use as an example throughout this section of the documentation.

SAMPLE DICTIONARY LISTINGS FROM FILE CUST.MAST

ID.	CID	DESCRIPTION	CONV	C/CORR	TP	MAX
2	SOLD.TO.ADD.1	SOLD TO ADDRESS1 25 MAX			LA	25
5	C.ST.ZIP	CITY.STATE.ZIP		F5;"".. ;6;:;"" " ;:;7;:	L	30
6	STATE	2 ALPHA-STATE CODE MAINTAINED SEPARATELY FOR SORTING			LA	2
13	A.CUST.NO	ALPHA CUST.NAME MAX 13 A/N			LA	13

DICTIONARY USE AND OVERVIEW

SAMPLE DICTIONARY LISTINGS FROM FILE CUST.MAST

ID.	CID	DESCRIPTION	CONV	C/CORR	TP	MAX
30	AR.BAL	TOTAL A/R BALANCE (MD2)	MR2		RN	12
35	CRED.HOLD	CREDIT HOLD 'Y'=CUST. ON CREDIT HOLD 'N'=NO			LA	1

RECALL GENERATOR OVERVIEW

The recall generator utility provides the facility to create and maintain recall statements processed against any data file. It is designed for users not having any special training in the use of the editor or recall. As a byproduct of this procedure, the recall program is permanently stored in a file called "ENGLISH".

Once on file, the recall listing can be retrieved and modified. If can be run merely by entering the program name using option #2.

A catalog of recall listings on file can be obtained for reference using option #3 on the menu.

If you need to generate the recall reports to a flatfile for transfer, use option #4 on the menu.

CREATE OR MAINTAIN RECALL REPORTS

PROGRAM NAME   ENG.BP ENGLISH.GENERATOR
SELECTION   20
SELECTION NUMBER   1
FILES ACCESSED   ENGLISH
                                VARIOUS

OVERVIEW
The program starts by prompting for the name of the file to be processed. It makes use of the dictionary of that file to validate input, and to display for the user on the screen the allowable dictionary names that may be used.

The program than prompts the user for:

        User defined catalog information
        Sort sequence and sub-total specifications
        Selection criteria
        Print specifications, and totaling information
        Report headings
        Print on CRT or printer

To start the process, enter menu option 1: 'Create or Maintain Recall Reports'. The first prompt will be:

OPERATING INSTRUCTIONS

FILE NAME: XXXXXXXXXXXXXX

Input the file name you wish to use for the report and hit 'RETURN' to advance to the next screen.

For this example we will create a customer listing of all customers flagged as credit hold "Y" in the Customer file. Input CUST.MAST at the file name prompt and hit 'RETURN' to advance to the next screen.

CREATE OR MAINTAIN RECALL REPORTS

CATALOG INFORMATION
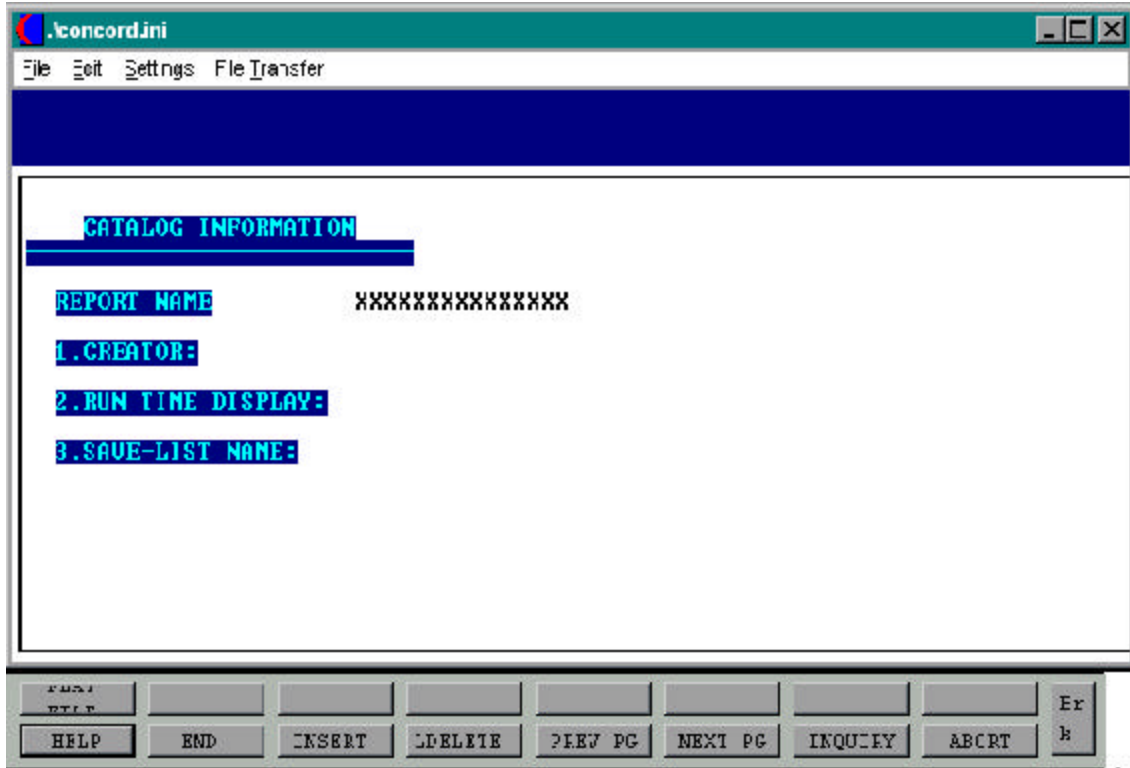
CREATE OR MAINTAIN RECALL REPORTS

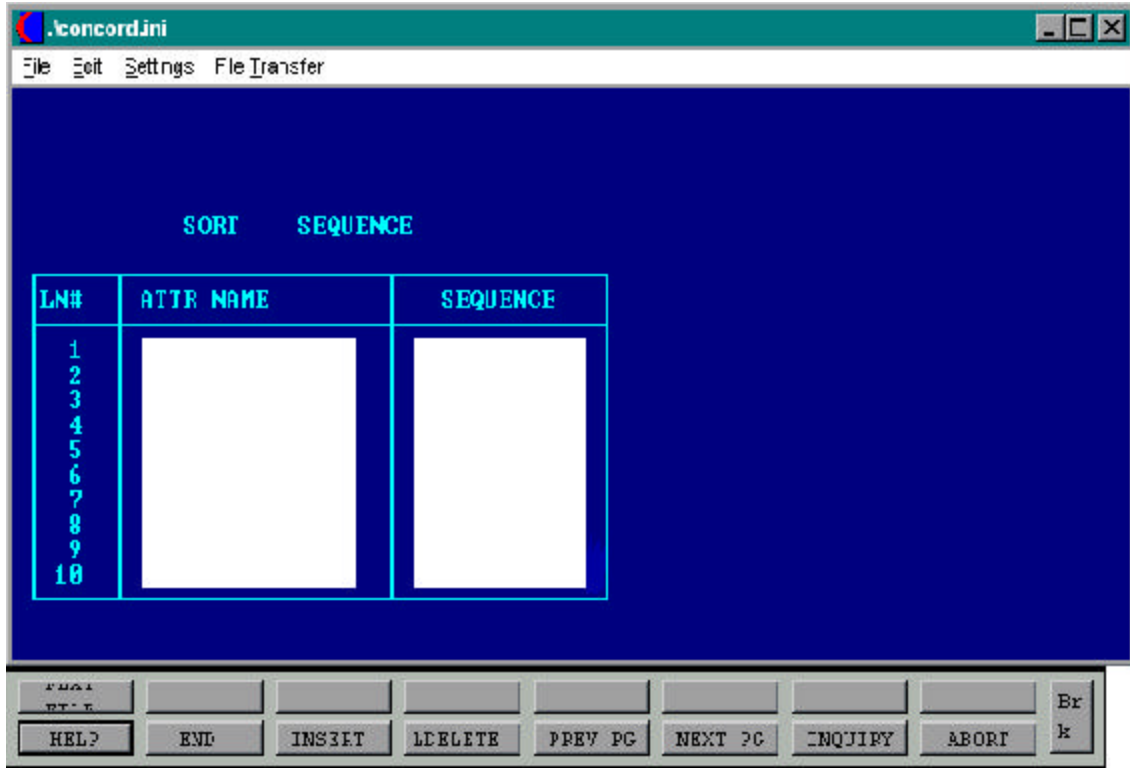**OPERATING INSTRUCTIONS (Continued)**

CATALOG INFORMATION
Here you will define the REPORT NAME, CREATOR and RUN TIME DISPLAY. At the report name enter CUSTLIST100 and hit 'RETURN'. At the CREATOR prompt enter your name or initials and hit 'RETURN'. At the RUN TIME DISPLAY prompt enter "CUSTOMER ON CREDIT HOLD REPORT and hit 'RETURN' to continue with the program.

The report name must not contain any spaces and will be used to run the listing. A listing of all reports for the creator may be run using option #3. The run time display entered is what will be displayed on the screen while the report is running.

CREATE OR MAINTAIN RECALL REPORTS

SORT SEQUENCE

CREATE OR MAINTAIN RECALL REPORTS

OPERATING INSTRUCTIONS (Continued)

SORT SEQUENCE
The sort sequence is used to classify and arrange the report in a certain sequence. For our example we will sort our report by state by external customer number, which in the Customer Master dictionary is attribute (6) STATE and (13) A.CUST.NO. You may use more than one attribute to sort the report. If you enter multiple sort attributes the report will start at the first attribute (STATE) and then within each State by the next attribute, which in this example would be customer number (A.CUST.NO).

Enter STATE in the attribute name prompt and hit 'RETURN'. Enter A.CUST.NO in the attribute name prompts and hit 'RETURN'.

Enter 'END' to advance to the next screen.

CREATE OR MAINTAIN RECALL REPORTS

SELECTION CRITERIA

CREATE OR MAINTAIN RECALL REPORTS

OPERATING INSTRUCTIONS (Continued)

SELECTION CRITERIA
The selection criteria is used to designate which attributes are to be specified for the report.

For our example, the selection criteria for our report will be for all customers on credit hold. The attribute for CREDIT HOLD is (56) in the Customer Master file and the attribute name is "CRED.HOLD". We will place CRED.HOLD in the attribute name field and hit 'RETURN'. In the RELATION field place a '=' and in the VALUE file enter 'Y', hit 'RETURN' through prompt and literal. We have now instructed the program to select all customers with CRED.HOLD = "Y" for the report. The setup would look like the following:

LN#	ATTR NAME	RELATION	VALUE	PROMPT LITERAL	CONN
1	CRED.HOLD	=	Y		AND

We can also use these fields to prompt for from and to information. See the sample below for an example of a prompt for from and to customer number.

LN#	ATTR NAME	RELATION	VALUE	PROMPT LINE	CONN
1	A.CUST.NO	>=	PROMPT	FROM CUST#	AND
2	A.CUST.NO	<=	PROMPT	TO CUST#	AND

This setup will prompt the user to enter a 'FROM' and 'TO' customer number. The relation field says select customer >= (greater than or equal to) the number entered and <= (less than or equal to) the second number entered.

Valid relation entries are:

=	equal to
#	not equal to
>	greater than
<	less than
>=	greater than or equal to
<=	less than or equal to

CREATE OR MAINTAIN RECALL REPORTS

OPERATING INSTRUCTIONS (Continued)

SELECTION CRITERIA (Continued)

If a specific value is input the report is run for than relation and value. Prompt can be used in the value, allowing the operator to enter a specific value each time the report is generated. The literal column would be used as the prompt display for the operator.

The field 'CONN' is used to describe how these fields should be connected. If 'AND' is used, the system will assume that **both criteria must be true** to fulfill the selection. If 'OR' is used, the system will pull all records that fulfill **one or the other** criteria. If you run onto selection problems in your reports, check this connector section first.

CREATE OR MAINTAIN RECALL REPORTS

VARIABLE LIST

```
┌─ .\concord.ini ──────────────────────────────────────────── _ □ × ─┐
│ File  Edit  Settings  File Transfer                                  │
│                                                                      │
│                     VARIABLE LIST                                    │
│                                                                      │
│     ┌────┬────────────────────────┬───────┬──────────┬───────────┬────────┐ │
│     │    │  ATTR NAME             │ BREAK │ NEW PAGE │ UNDERLINE │ TOTALS │ │
│     ├────┼────────────────────────┼───────┼──────────┼───────────┼────────┤ │
│     │  1 │ XXXXXXXXXXXXXXXXXXXXX   │       │          │           │        │ │
│     │  2 │                        │       │          │           │        │ │
│     │  3 │                        │       │          │           │        │ │
│     │  4 │                        │       │          │           │        │ │
│     │  5 │                        │       │          │           │        │ │
│     │  6 │                        │       │          │           │        │ │
│     │  7 │                        │       │          │           │        │ │
│     │  8 │                        │       │          │           │        │ │
│     │  9 │                        │       │          │           │        │ │
│     │ 10 │                        │       │          │           │        │ │
│     └────┴────────────────────────┴───────┴──────────┴───────────┴────────┘ │
│                                                                      │
│  ┌─────────────────────────────────────────────────────────────┐   │
│  │ Use "INQUIRY" to get a list of attributes and descriptions    │   │
│  └─────────────────────────────────────────────────────────────┘   │
│                                                                      │
│  ┌──────┐ ┌──────┐ ┌───────┐ ┌───────┐ ┌───────┐ ┌───────┐ ┌───────┐ ┌───────┐ ┌──┐ │
│  │ HELP │ │ END  │ │INSERT │ │LDELETE│ │PREV PG│ │NEXT PG│ │INQUIRY│ │ ABORT │ │Br│ │
│  └──────┘ └──────┘ └───────┘ └───────┘ └───────┘ └───────┘ └───────┘ └───────┘ └──┘ │
└──────────────────────────────────────────────────────────────────────┘
```
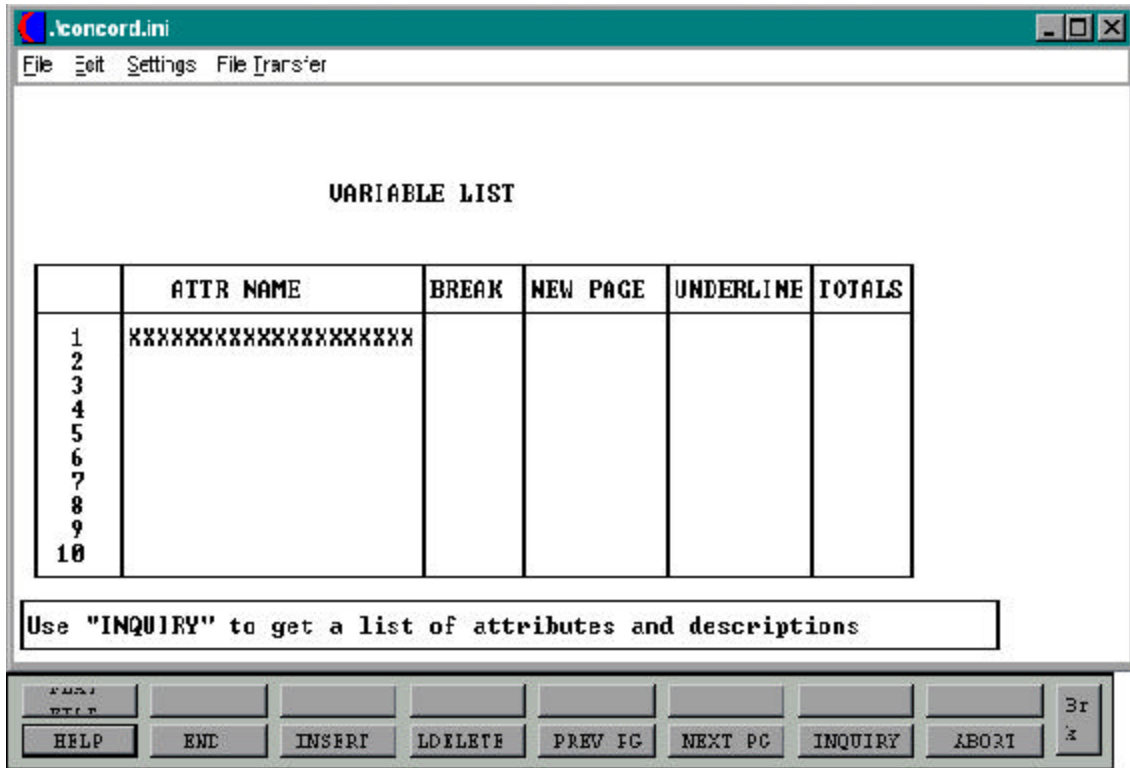
CREATE OR MAINTAIN RECALL REPORTS

OPERATING INSTRUCTIONS (Continued)

VARIABLE LIST
The variable list allows the creator to display additional items on the report. The example below shows the items we would include on our 'CUSTOMER ON CREDIT HOLD' report.

LN	ATTR NAME	BREAK	NEW PAGE	UNDERLINE	TOTAL
1	A.CUST.NO	N	N	N	N
2	SOLD.TO.ADD.1	N	N	N	N
3	C.ST.ZIP	N	N	N	N
4	AR.BAL	N	N	N	Y
5	CRED.HOLD	N	N	Y	N
6	STATE	Y	Y	N	N

If you wish to 'BREAK' a report on a certain field, enter 'Y' in the break field, if you wish to break and start a new page enter 'Y' in new page. If you wish to total and underline a field enter 'Y' in both the underline and total fields.

For example, if you were creating a open accounts receivable listing your variable list would look something like this:

LN	ATTR NAME	BREAK	NEW PAGE	UNDERLINE	TOTAL
1	A.CUST.NO	Y	Y	N	N
2	OPEN-BAL	Y	Y	Y	Y

NOTE: If the report should exceed 132 characters, it will run vertically.

CREATE OR MAINTAIN RECALL REPORTS

OPERATING INSTRUCTIONS (Continued)

REPORT INFO
When you are through you will be prompted:

IS THE PRINTER TO BE USED (Y/N)

Enter 'Y' to send the report to the assigned output queue, or 'N' to direct the report to the CRT.

SHOULD THE REPORT BE DOUBLED SPACED (Y/N)

Enter 'Y' to double space the report, 'N' to single space.

SHOULD THE ID BE SUPPRESSED (Y/N)

Enter 'Y' to suppress the ID, for example the ID for the file we used 'CUST.MAST' is the internal customer number. Since we do not need this on our report we will answer 'Y' for this prompt. If the ID is meaningful for the report enter 'N'. (For example: an order register - order number which is the ID of the file would be meaningful on the report.)

SHOULD THE DETAIL BE SUPPRESSED (Y/N)

Enter 'Y' to suppress file detail, enter 'N' to include the detail. For example, if you wished to display A/R total summary on a report and not the individual invoices and credit memos, you would answer 'Y' to this prompt.

INPUT HEADING OR 'END'

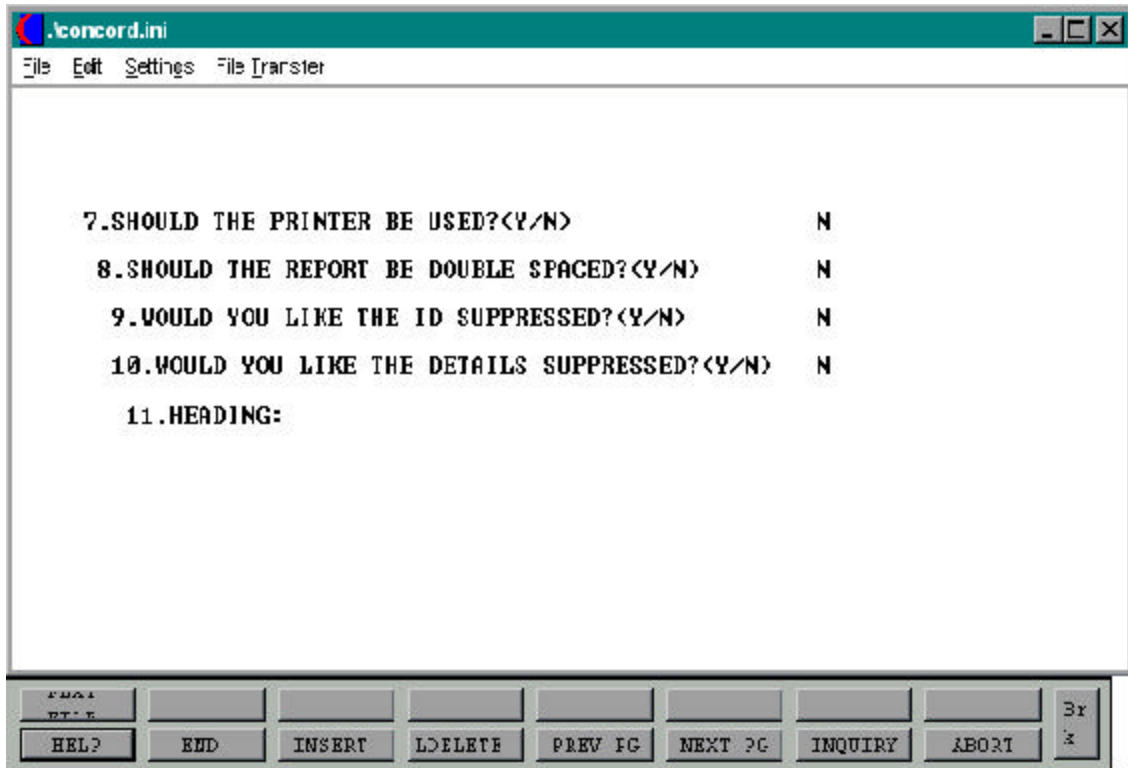###

Enter the heading you wish to appear on the report, make is as meaningful as possible. For our example, we will input "CUSTOMERS ON CREDIT HOLD REPORT". The heading may be 2 lines if necessary.

CONGRATULATIONS: You have created your first recall report. Let's turn to the next section to learn now to print the report we created.

CREATE OR MAINTAIN RECALL REPORTS

REPORT INFO

```
7.SHOULD THE PRINTER BE USED?<Y/N>              N

 8.SHOULD THE REPORT BE DOUBLE SPACED?<Y/N>     N

  9.WOULD YOU LIKE THE ID SUPPRESSED?<Y/N>      N

  10.WOULD YOU LIKE THE DETAILS SUPPRESSED?<Y/N>  N

   11.HEADING:
```

| HELP | END | INSERT | L>ELETE | PREV PG | NEXT PG | INQUIRY | ABORT |

RUN A RECALL REPORT ON FILE

PROGRAM NAME   SSS.BP GEN.MASTER
                               ENG.EXECUTE010
SELECTION   MENU-20
SELECTION NUMBER   2
FILES ACCESSED   ENGLISH
                               VARIOUS

OVERVIEW
This option allow you to run any recall report on file.

OPERATING INSTRUCTIONS

PROGRAM ID:

Enter the report name you entered on the catalog information screen for the report you wish to print. If at any time you cannot remember the report name you have given a report, either hit 'F7' for a CRT listing of the names of the reports, or use the next program to list reports on the system.

PRINT A REPORT OF RECALL PROGRAMS ON FILE

PROGRAM NAME   SSS.BP GEN.MASTER
                                ENG.LISTING010
SELECTION   MENU-20
SELECTION NUMBER   3
FILES ACCESSED   ENGLISH

OVERVIEW
This program will give you a listing of all reports that have been created through recall generator.

OPERATING INSTRUCTIONS

RECALL CATALOG LISTING

WHAT SEQUENCE SHOULD THE CATALOG BE PRODUCED IN:

1.   **BY REPORT NAME**   **SORT BY REPORT NAME**
2.   **BY CREATOR**   **SORT BY CREATOR**
3.   **BY DATE CREATED**   **SORT BY DATE CREATED**
4.   **BY FILE NAME**   **SORT BY SOURCE FILENAME OR END:**

Input 1, 2, 3 or 4 for the sort selection of the report. When you choose a sort method, the system will then prompt:

ENTER <CR> TO PRINT ON SCREEN OR "P" TO PRINT ON PRINTER:

The system will then generate the report to either the screen or the printer, and will come back with a message that says:

HIT <CR> TO CONTINUE

PRINT A REPORT OF RECALL PROGRAMS ON FILE

```
   02:28:47pm        10 DEC 1998      *** RECALL CATALOG LISTING ***                   PAGE  1


ENGLISH              DESCRIPTION                         DT.CREATED    CREATOR    FILE NAME


AR-SLSM              PAID AR BASED ON SALESMAN           08/15/98      GMS        AR
AR-SLSM-TERR         PAID AR BASED ON SLSM BY TERRITORY  09/10/98      GMS        AR
RECEIVED             RECEIVED PURCHASE ORDERS            10/01/98      RAS        PO
REC-ADJ              RECEIVER ADJUSTMENTS                10/15/98      RAS        INV.RCPT


4 records listed.
```

ENGLISH GENERATOR FLAT FILE CREATION

PROGRAM NAME   SSS.BP GEN.MASTER
                                ENG.FLAT.EXECUTE010
SELECTION   MENU-20
SELECTION NUMBER   4
FILES ACCESSED   MD
                                ENGLISH
                                FLATFILE.TXT
                                &SAVEDLISTS&

OVERVIEW
This program gives you the ability to create a flat file.

OPERATING INSTRUCTIONS

REPORT NAME

Enter a record from the English file for this screen to convert to a flat file to the output.

FIELD DELIMITER

Enter the field delimiter for this file, the default is null. The field delimiter is used to separate fields.

RECORD DELIMITER

Enter the record delimiter for this file, the default is carriage return. The record delimiter is used to separate records.

BLOCK SIZE

Enter the block size of the file it will be created in blocks of 'n' size depending on your entry, default is null.

ENGLISH GENERATOR FLAT FILE CREATION

OPERATING INSTRUCTIONS (Continued)

SAVE METHOD

Enter the method to output this flat file for tape. You will be prompted for the device name, for DOS file the default floppy is used. Allowable entries are F for file, D for DOS diskette or T for tape.

If you select 'F' for file you will be prompted:

RECORD NAME

Enter the record name for this file. The program checks to make sure no files are overwritten.

REPORT NAME

Enter the name you wish to give this report. The program checks for existing files and will not allow you to overwrite previous files with the same name.

If you select 'D' for DOS diskette you will be prompted:

DOS FILE NAME

Enter a valid DOS file name for this file to be written to. You must have a DOS formatted diskette in the default drive of the machine.

If you select 'T' for tape you will be prompted:

TAPE DEVICE

Enter the name of the device to be used for output, it is verified against the device file.

ENTER LINE # TO CHANGE SETTINGS OR "Y" TO CREATE FLAT FILE:

Enter line number to change or "Y" to create the flat file.

I N D E X