Report Capture

Training Guide

MDS Report Capture Training
Guide

Report Capture Training Guide

The following training guide is a users manual for MDS' report manager, Report Capture.

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Introduction

- How to use Report Capture
- How to Design Report Templates

MDS Report Capture Training Guide

Introduction

The Report Capture feature enables reports to be captured and sent to a hold file. Using The Report Master Menu, users can then view, print, e-mail, and download any captured file.

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Agenda

- Function Key Definitions
  - Report Functions for Existing Reports
- Designing Report Templates
  - Manual Method
  - Visual Method

MDS Report Capture Training Guide

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Getting Started:
Operator File Settings

Report Capture settings in the Operator File:

Everyone with a log-on may use report capture. Each user's reports will be saved to their own report capture so that other do not accidentally delete a report.

However**, Super-User Access** allows the specified operator(s) to view another operator's Report Capture. Super-User Access specified in the Operator file (File Maintenance-Company Related Files-Operator) by **Process Code SU.**
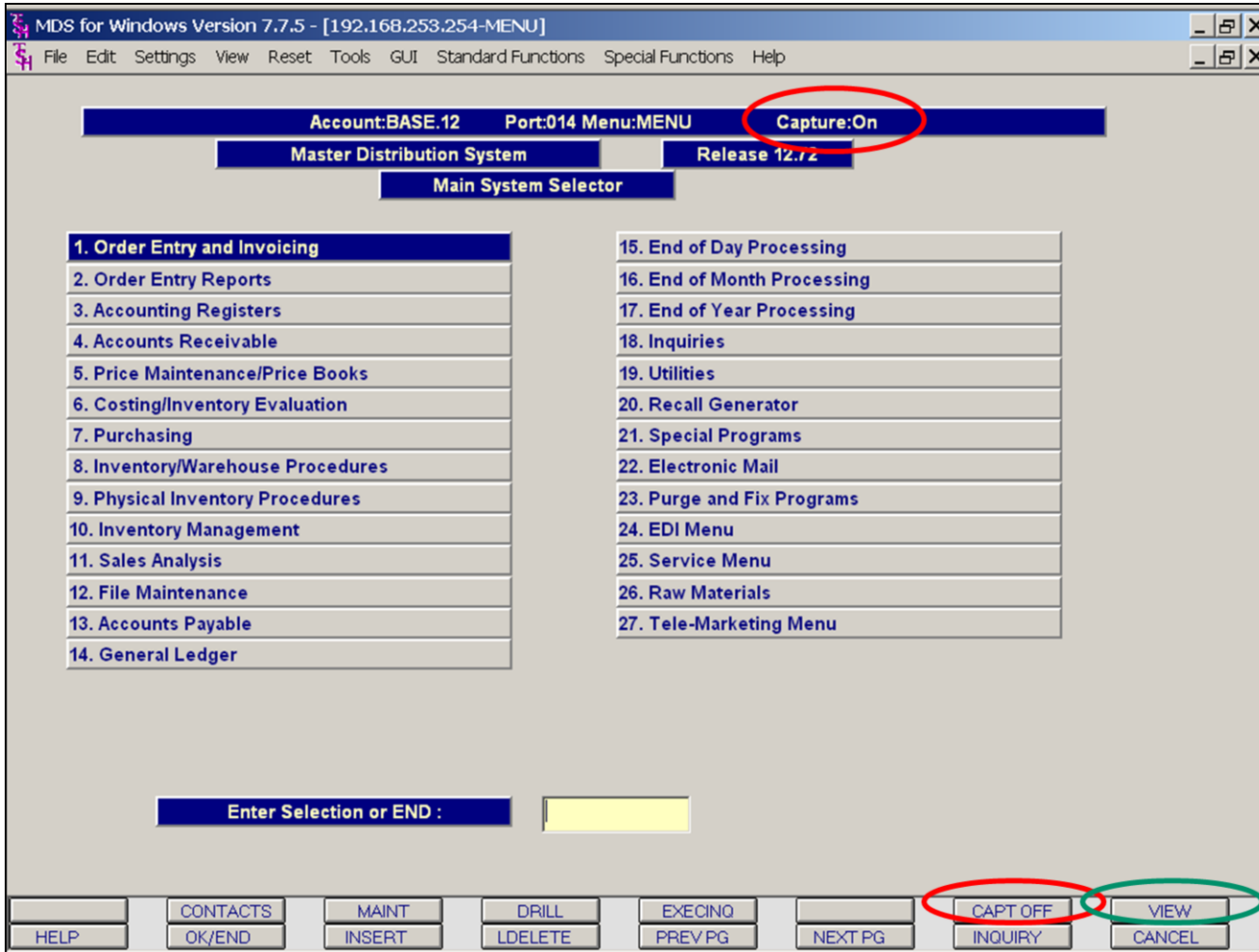
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Main Menu

Enabling Report Capture

Before any reports can be seen in Report Capture, the **Report Capture feature must first be enabled**. From any menu, use the <Shift+F7> function key. This key is highlighted in red on the bottom of the page. This key is a toggle key. The label on the key toggles between CAPTOFF (turn report capture off) and CAPT ON (Turn report capture ON) The Capture Status is shown on the top right-hand side of the screen (highlighted in red circle). To send a report to report capture the **Capture status on the top of the page MUST say ON**.

Note: most MDS customers have capture set to automatically be ON unless it is turned off.

Sending Reports to Report Capture

To send a report to report capture, you run any MDS report as you normally would **with Report Capture turned on**. Instead of the report automatically spitting out to a printer, it will be saved in report capture. Once a report is in Report Capture, users can print the entire report or a few pages, download the report to a flat-file, email or fax the report (fax and email server required).

Viewing Reports in Report Capture

To enter Report Capture, use the or VIEW <Shift+F8> function key or click on the 'VIEW' button, to VIEW a report saved to Report Capture. This will display a list of all reports sent to your report capture.

There are separate report captures for End of Day, AR End of Month, AP End of Month, and GL End of Month. The reports can be accessed from the End Of Day and End of Month Menu options.

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Report Master - Report Summary    CAPTURED

User : johnsenr    Archive :

#    Report Name                                Date       Time      Size St
     _____

  1. Stock Status--Sales Report                 08/27/02 02:10:35  15267
  2. Picker, Packer Productivity Report          08/27/02 02:10:20   1136
  3. Daily Non-Stock Report                      08/27/02 02:10:16    880
  4. Price Hold Report                           08/27/02 02:10:06  39531
  5.
  6.
  7.
  8.
  9.
 10.
 11.
 12.
 13.
 14.
 15.

Enter Line# to View, DELETE to Delete or END :XXXXXX

All Rpts  Range    DelRange  Comm/User  Copy     Flat     Fax      EMail
HELP      END      INSERT    LDELETE    PREV PG  NEXT PG  INQUIRY  ABORT
```

Function Keys- Overview

There are 8 function keys across the bottom of the screen. Each key has 2 sections. The lower lever are basic function keys. These labels stay the same throughout MDS. You may access these functions by clicking on the lower function button or F1-F8 keys.

The upper level are the contextual function keys. The labels will change from screen to screen. You may access these functions by clicking on the upper button or hitting SHIFT + F1..etc.

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Report Master - Report Summary    CAPTURED

User : johnsenr   Archive :

#   Report Name                                Date      Time     Size St

  1.Stock Status--Sales Report                08/27/02 02:10:35  15267
  2.Picker, Packer Productivity Report         08/27/02 02:10:20   1136
  3.Daily Non-Stock Report                     08/27/02 02:10:16    880
  4.Price Hold Report                          08/27/02 02:10:06  39531
  5.
  6.
  7.
  8.
  9.
 10.
 11.
 12.
 13.
 14.
 15.

Enter Line# to View, DELETE to Delete or END :XXXXXX
All Rpts  Range      DelRange  Comm/User Copy      Flat      Fax      EMail
HELP      END        INSERT    LDELETE   PREV PG   NEXT PG   INQUIRY  ABORT
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Function Keys- Overview

These are your basic function key definitions.

HELP- The HELP function key will bring up a pop-up help box with useful information on additional feature of Report Capture.

END - The END function is available by clicking on the 'END' button or by pressing the <F2> function key. This feature eliminates the need to manually type the word 'END' at the end of a screen.

INSERT - The INSERT function is used to insert text in the middle of a text field.

LDELETE – The LINE DELETE function is available by clicking on the 'LDELETE' button or by pressing the <F4> function key. The LDELETE function allows the user to delete a report from the Report Capture view. Simply bring the cursor to the line or field you wish to delete and click on the 'LDELETE' button or press the <F3> function key.

PREV PG – The PREVIOUS PAGE function key is available by clicking on the 'PREV PG' button or by pressing the <F5> function key. This function is used to view previous reports in the list. This function is used in conjunction with the NEXT PG function button (see next item) to move back and forth through a multi-page list.

NEXT PG – The NEXT PAGE function is available by clicking on the 'NEXT PG' button or by pressing the <F6> function key. This function is used to view additional reports in a list. This function is used in conjunction with the PREV PG function to move back and forth through a multi-page list.

INQUIRY – The INQUIRY function is used to bring up a list of choices for certain fields.

ABORT – The ABORT function is available by clicking on the 'ABORT' button or by pressing the <F8> function key. This function is used to exit out of the Report Capture viewer or out of a report without saving changes.

Report Master View Help

```
n                      - Move to Line n
Down Arrow             - Move Down One Line
Up Arrow               - Move Up One Line
<F5>                   - Move Up the Page
<F6>                   - Move Down the Page
Right Arrow            - Shift Right
Left Arrow             - Shift Left
<SHIFT F1>             - Move to Top of Report
<SHIFT F2>  or $       - Move to End of Report
/pattern               - Find Pattern
/                      - Repeat Last Find - Forward
^pattern               - Find Pattern - Backward
^                      - Repeat Last Find - Backward
SHIFTnn                - Change Column shift to 'nn'
SELECT or S            - Select Printer other than Default
<SHIFT F3> or V80      - View 80 columns of data
<SHIFT F4> or V132     - View 132 columns of data
<SHIFT F5> or P        - Print All or Part of Report
<SHIFT F6> or FAX      - FAX All or Part of Report
<SHIFT F7> or MAIL     - e-Mail All or Part of Report
<SHIFT F8> or MARK     - Mark block of report
   (or use Mouse)
```

Report Capture Master Function Keys HELP Function and Pattern Search

The **HELP** function is available by clicking on the 'HELP' button or by pressing the <F1> function key. In the report viewer, HELP function will display all the functions available in Report Capture.

Search:

To search a document for a particular word, or product number, you can use the **Find Pattern feature**. For example, To search for product number "12345", while in a report, you would type /12345 and ENTER. You would then be taken to the first page in the document where "12345" occurs. To find it again, you would simply type "/".

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Report Master - Report Summary    CAPTURED

User : johnsenr   Archive :

#   Report Name                             Date      Time     Size St
_____
 1.Stock Status--Sales Report              08/27/02 02:10:35  15267
 2.Picker, Packer Productivity Report       08/27/02 02:10:20   1136
 3.Daily Non-Stock Report                   08/27/02 02:10:16    880
 4.Price Hold Report                        08/27/02 02:10:06  39531
 5.
 6.
 7.
 8.
 9.
10.
11.
12.
13.
14.
15.

Enter Line# to View, DELETE to Delete or END :XXXXXX
All Rpts  Range    DelRange  Comm/User Copy      Flat      Fax       EMail
HELP      END      INSERT    LDELETE   PREV PG   NEXT PG   INQUIRY   ABORT
```

Function Key Definitions

The following are the upper, or shift-function key definitions for report capture.

ALL RPTS – The ALL REPORTS function is available by clicking on the 'ALL RPTS' button or by pressing the <Shift+F1> function key. This will display all the reports listed in the Report Master view.

RANGE – The RANGE function is available by clicking on the 'RANGE' button or by pressing the <Shift+F2> function key. This will allow the user to select a starting and ending range of reports to view.

DEL RANGE – The DELETE RANGE function is available by clicking on the 'DEL RANGE' button or by pressing the <Shift+F3> function key. This will allow the user to select a starting and ending range of reports to delete.

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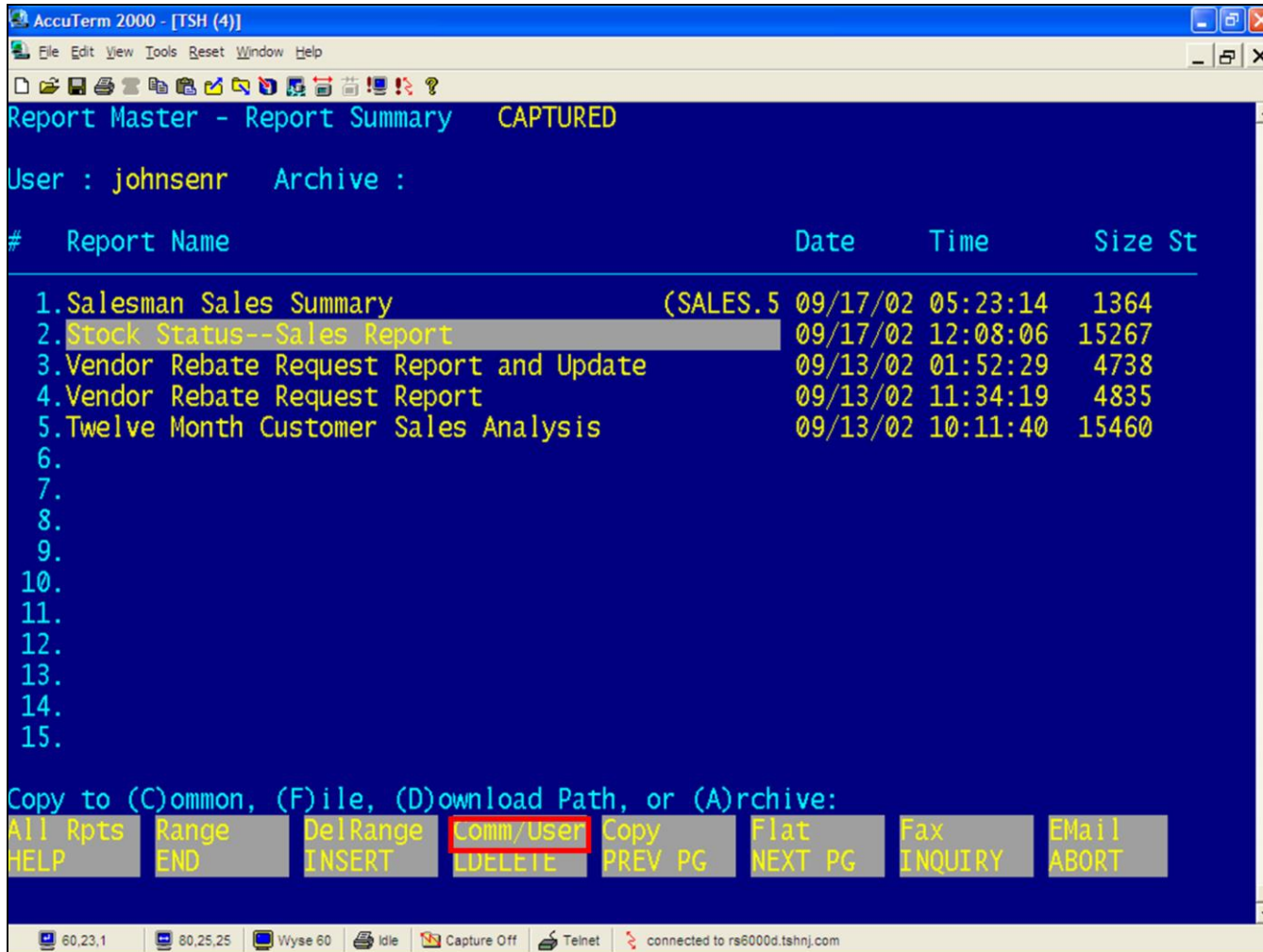
Function Key Definitions Copy Function

COMM/USER – The COMMON/USER function is available by clicking on the 'COMM/USER' button or by pressing the <Shift+F4> function key. This will allow the user to view the reports in their own Report Capture or the COMMON Report Capture.

The **COMMON** function copies the selected report to a new key for the Common Report Capture. If the item already exists, the operator can overwrite it by answering 'Y***'.

```
AccuTerm 2000 - [TSH (4)]
File Edit View Tools Reset Window Help

Report Master - Report Summary    CAPTURED

User : johnsenr   Archive :

#   Report Name                              Date      Time     Size St

 1.Salesman Sales Summary         (SALES.5 09/17/02 05:23:14   1364
 2.Stock Status--Sales Report              09/17/02 12:08:06  15267
 3.Vendor Rebate Request Report and Update  09/13/02 01:52:29   4738
 4.Vendor Rebate Request Report            09/13/02 11:34:19   4835
 5.Twelve Month Customer Sales Analysis    09/13/02 10:11:40  15460
 6.
 7.
 8.
 9.
10.
11.
12.
13.
14.
15.

Copy to (C)ommon, (F)ile, (D)ownload Path, or (A)rchive:
All Rpts  Range     DelRange  Comm/User Copy      Flat      Fax       EMail
HELP      END       INSERT    LDELETE   PREV PG   NEXT PG   INQUIRY   ABORT

  60,23,1    80,25,25   Wyse 60   Idle   Capture Off   Telnet   connected to rs6000d.tshnj.com
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Function Key Definitions Copy Function continued

The **FILE** function copies the selected report to a valid Universe file. The system will ask the operator for the filename and the item key to copy to. See example.

If the item already exists, the operator will be prompted: "Item XXXX already exists – Overwrite? (Y)".

The operator can overwrite it by answering 'Y***'.

AccuTerm 2000 - [TSH (4)]

File Edit View Tools Reset Window Help

Report Master - Report Summary   CAPTURED

User : johnsenr   Archive :

#	Report Name	Date	Time	Size St
1.	Salesman Sales Summary (SALES.5	09/17/02	05:23:14	1364
2.	Stock Status--Sales Report	09/17/02	12:08:06	15267
3.	Vendor Rebate Request Report and Update	09/13/02	01:52:29	4738
4.	Vendor Rebate Request Report	09/13/02	11:34:19	4835
5.	Twelve Month Customer Sales Analysis	09/13/02	10:11:40	15460
6.				
7.				
8.				
9.				
10.				
11.				
12.				
13.				
14.				
15.				

Enter ITEM KEY to copy Report : SALES SUMMARY.XLS_

All Rpts	Range	DelRange	Comm/User	Copy	Flat	Fax	EMail
HELP	END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	ABORT

51,22,1   80,25,25   Wyse 60   Idle   Capture Off   Telnet   connected to rs6000d.tshnj.com

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Function Key Definitions
Copy Function/ Download Path

The **DOWNLOAD PATH** function downloads the report to the path that is specified in Archive Maintenance. This is a shared directory, which can be accessed over the network by PC's. Windows Explorer or FTP can be used to move the report to the local machine. When downloading the report the operator may keep the existing filename or specify the filename at the prompt as shown in the example.

The operator may choose to keep the capture id for the archive function. The report will show an '*' in the ST column in Report Capture View if it does not have a capture id.

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AccuTerm 2000 - [TSH (3)]
File  Edit  View  Tools  Reset  Window  Help

Report Master - Report Summary    CAPTURED

User : johnsenr    Archive :

#   Report Name                                   Date       Time      Size St

 1.Stock Status--Sales Report                     09/24/02 05:04:37    2581
 2.Fill Rate Report                               09/24/02 03:52:11     668
 3.Fill Rate Report                               09/24/02 03:43:34     668
 4.Fill Rate Report                               09/24/02 01:27:17     668
 5.Update Aging to Customer File                  09/24/02 01:25:56
 6.Source Upgrade Instructions                    09/23/02 11:20:27     765
 7.Source Upgrade Instructions                    09/20/02 02:38:20     773
 8.Salesman Sales Summary           (SALES.5      09/17/02 05:23:14    1364
 9.Stock Status--Sales Report                     09/17/02 12:08:06   15267
10.Vendor Rebate Request Report and Update        09/13/02 01:52:29    4738
11.Vendor Rebate Request Report                   09/13/02 11:34:19    4835
12.Twelve Month Customer Sales Analysis           09/13/02 10:11:40   15460
13.
14.
15.
Enter ITEM KEY or Return to keep Capture ID :

All Rpts   Range     DelRange   Comm/User  Copy       Flat      Fax       EMail
HELP       END       INSERT     LDELETE    PREV PG    NEXT PG   INQUIRY   ABORT

  48,22,1      80,25,25    Wyse 60    Idle    Capture Off    Telnet    connected to rs6000d.tshnj.com
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Function Key Definitions Copy Function Archive

The **ARCHIVE** function allows the user to save the report to an archive directory. The directory must be previously defined in Archive Maintenance. The user will be able to select the Archive file from a pop-up box.

The user may choose to keep the capture ID or specify a key.

If the item already exists, the operator may overwrite by answering 'Y***' to the system prompt.

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AccuTerm 2000 - [TSH (3)]
File  Edit  View  Tools  Reset  Window  Help

Report Master - Report Summary    CAPTURED

User : johnsenr   Archive :

#   Report Name                                          Time      Size St
                    Report Master Archive File Lookup Screen
  1. Stock Status--S  Line#  Archive Filename            05:04:37   2581
  2. Fill Rate Repor    1.  tmp directory hold           03:52:11    668
  3. Fill Rate Repor    2.  Local capture               03:43:34    668
  4. Fill Rate Repor    3.  specific capture            01:27:17    668
  5. Update Aging to    4.  TEST1                       01:25:56
  6. Source Upgrade     5.  Download reports            11:20:27    765
  7. Source Upgrade                                      02:38:20    773
  8. Salesman Sales                                      05:23:14   1364
  9. Stock Status--S                                     12:08:06  15267
 10. Vendor Rebate R                                     01:52:29   4738
 11. Vendor Rebate R                                     11:34:19   4835
 12. Twelve Month Cu                                     10:11:40  15460
 13.
 14.
 15.
      Enter ITEM KEY or Return to keep Capture ID :

All Rpts   Range      DelRange   Comm/User  Copy       Flat       Fax        EMail
HELP       END        INSERT     LDELETE    PREV PG    NEXT PG    INQUIRY    ABORT

  21,8,1      80,25,25    Wyse 60    Idle    Capture Off    Telnet    connected to rs6000d.tshnj.com
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Function Key Definitions
Flat(file) Function

The **FLAT** function is available by highlighting the selected report, then clicking on the 'FLAT' button or by pressing the <Shift+F2> function key. This will allow the operator to convert a report to a flat file. A template, described in a separate section, must already exist in the system.

For custom reports, the user will be prompted with the message: "Enter TEMPLATE to use or 'NEW'".

For standard reports, with system templates, the user will be prompted: "Enter TEMPLATE to use, RETURN for Standard, or 'NEW'", see example.
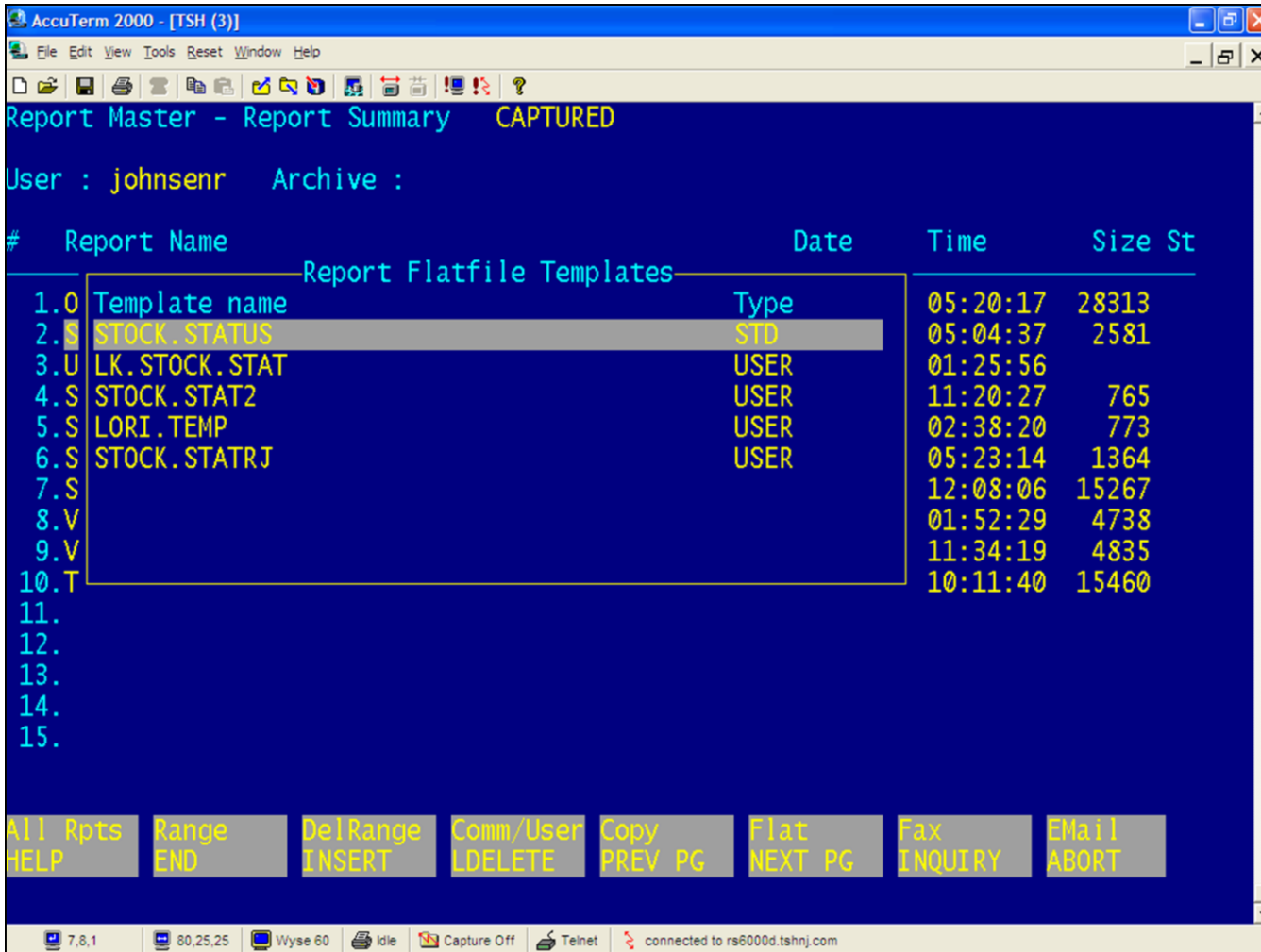
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Save As Flat Function (continued)

An Inquiry is then available by clicking on the 'INQUIRY' button or by pressing the <F7> function key. This will allow the user to choose which template to use, followed by hitting <RETURN>.

Once a template has been selected, the results may be sent to one of the four options: **Save, E-mail, Download, Maintain user template**.

The **SAVE** function saves the file to a pre-determined file and item name, stored in the template. If it is not defined, the user will be prompted for the file and item key.

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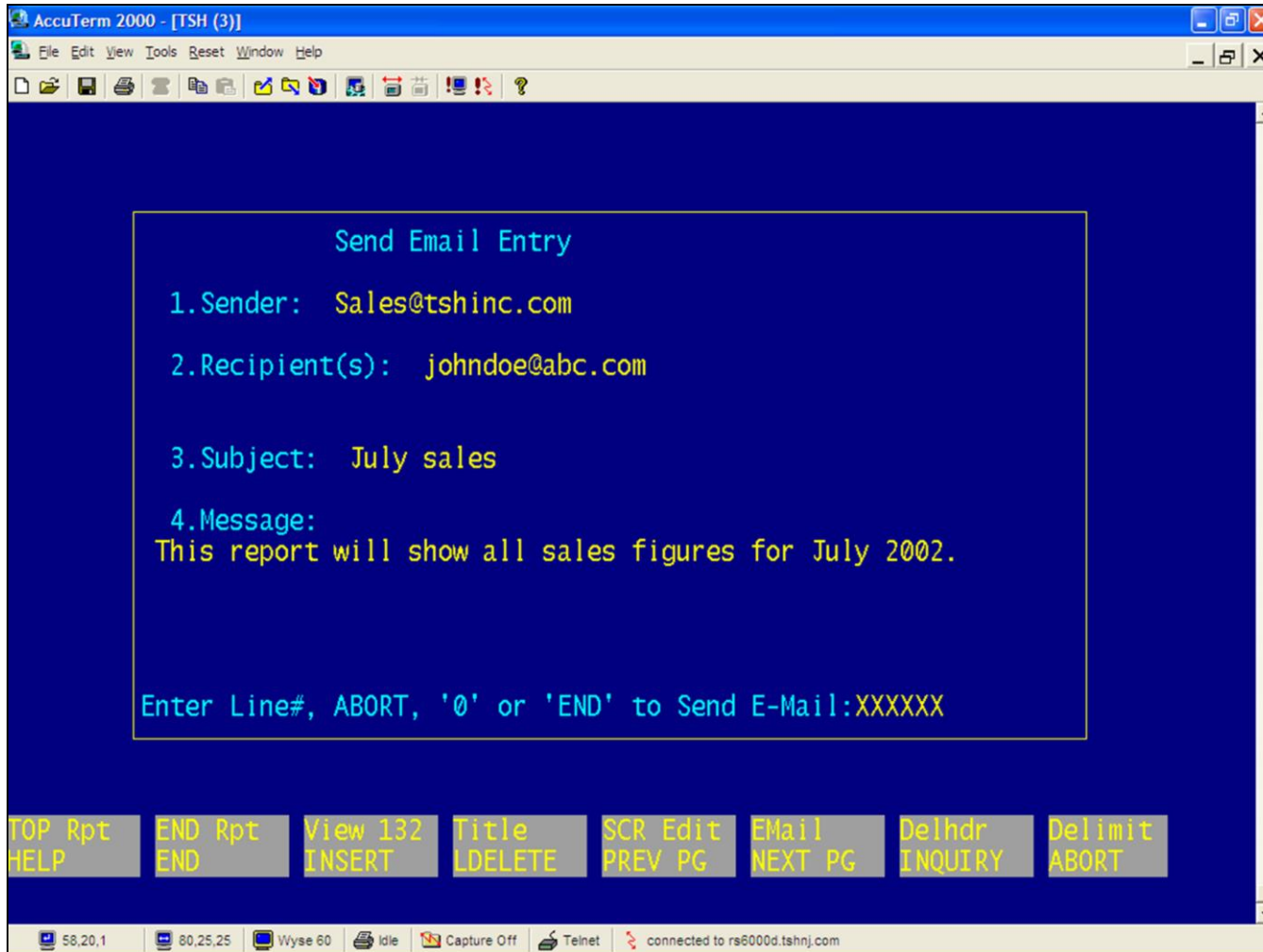
Function Key Definitions

Flat Function continued

The **EMAIL** function allows the user to e-mail the selected report as an attachment.

SENDER – Enter the sender's (user's) e-mail address. This will be the e-mail address used if the recipient chooses to reply to the e-mail being sent.

RECIPIENTS(S) – Enter the recipient(s) e-mail address. Multiple addresses need to be separated by a semicolon.

SUBJECT – Enter the reference information for this e-mail.

MESSAGE – Enter text information, if any, that will appear for this message.

ENTER LINE #, ABORT, '0' OR 'END' TO SEND E-MAIL: *XXXXXX*

Enter the line number to change. Enter 'ABORT' to end without sending the e-mail. Enter '0' to accept and send the e-mail. Enter 'END' to end out and send the e-mail.

The **DOWNLOAD** function will allow the user to download a report, as a flat file, to a pre-defined shared directory. The operator will be prompted to enter the Item Key or hit <RETURN> to choose the default Item Key.

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RC Fax Function

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  Report Master FAX Format

Set Laser Printer to Landscape Format
Set Laser Printer to Portrait Format
Laser Form (PO,INVOICE,etc)
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The **FAX** function is available by clicking on the 'FAX' button or by pressing the <Shift+F6> function key. This allows the user to fax the selected report directly from Report Capture. The system will display the Report Master Fax Options. The user is given the choice of the format for the report. The user will choose from: Set to Landscape Format, Set to Portrait Format, or Laser Form (PO, INVOICE, etc). See example.

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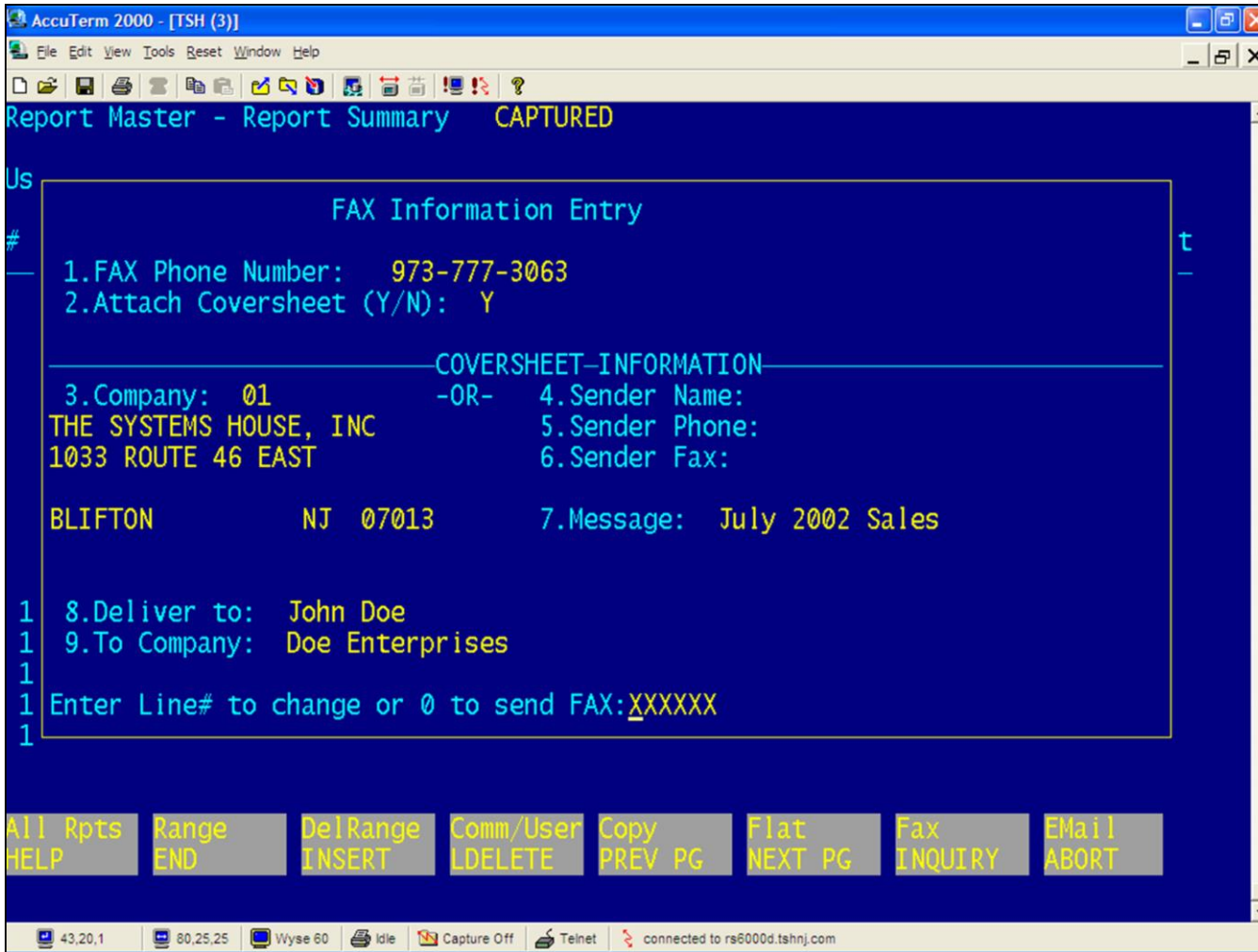
Once one of the format options are chosen, the Fax Information Entry screen is displayed. See example.

FAX – Enter the phone number the fax software should dial to send this fax.

ATTACH COVER SHEET – Enter 'Y' to attach a cover sheet, or 'N' to send the report only.

COMPANY – Enter a company number from the company file or <RETURN> to enter the Sender Information.

SENDER NAME – Enter the name of the person or department sending this fax.

SENDER PHONE – Enter the phone number of the person sending this fax or the phone number to contact, in case the fax did not transmit properly.

SENDER FAX – Enter the phone number of your fax machine for any return faxes.

MESSAGE – Enter a message, which will appear on the cover sheet. If the user leaves this blank, the message will read: "See Attached Report Page(s)".

DELIVER TO – Enter name of the person or department that should receive this fax.

TO COMPANY - Enter the company name that will be receiving this fax.

ENTER LINE# TO CHANGE OR '0' TO SEND FAX: XXXXXX

Enter the line number to change. Enter 'ABORT' to end without faxing the

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document. Enter '0' to accept and send the fax.

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E-mail Function Key Definitions

The EMAIL function is available by clicking on the 'EMAIL' button or by pressing the <Shift+F8> function key. This allows the user to e-mail the selected reports as an attachment. See example.

SENDER – Enter the sender's (user's) e-mail address. This will be the e-mail address used if the recipient chooses to reply to the e-mail being sent.

RECIPIENTS(S) – Enter the recipient(s) e-mail address. Multiple addresses need to be separated by a semicolon.

SUBJECT – Enter the reference information for this e-mail.

MESSAGE – Enter text information, if any, that will appear for this message.

ENTER LINE #, ABORT, '0' OR 'END' TO SEND E-MAIL: *XXXXXX*

Enter the line number to change. Enter 'ABORT' to end without sending the e-mail. Enter '0' to accept and send the e-mail. Enter 'END' to end out and send the e-mail.

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AccuTerm 2000 - [TSH (3)]
File  Edit  View  Tools  Reset  Window  Help

                    Send Email Entry

    1.Sender:   Sales@tshinc.com

    2.Recipient(s):   johndoe@abc.com


    3.Subject:   July sales

    4.Message:
  This report will show all sales figures for July 2002.




  Enter Line#, ABORT, '0' or 'END' to Send E-Mail:XXXXX
```

TOP Rpt	END Rpt	View 132	Title	SCR Edit	EMail	Delhdr	Delimit
HELP	END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	ABORT

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```
   PAGE    1                     INVENTORY STOCK STATUS BY BRANCH BY PROD

      WHSE: 001--NEW YORK


:M NO                         BEGIN!RECEIPTS!   SALES!RETURNS!ADJUSTS!CON
 PRODUCT DESCRIPTION             !  & PROD!    MTD !      !& TRANS! &
                              ------------------------------------------
                                !       !       !       !       !
   TEST                        0!  13222!     84!    -36!     0!
                              ------------------------------------------
   PRODUCT CLASS: 001              13222             -36
                                0                84              0



                                !       !       !       !       !
   ULTRA BROWN PLASTIC DESK     0!      4!     44!     0!    -5!
                                !       !       !       !       !
   ULTRA GREEN PLASTIC DESK     0!      0!      0!     0!     0!
                              ------------------------------------------
   PRODUCT CLASS: 101                   4                0
                                0                44              -5

                                            Report Master (1,1)
 RPT     END RPT   VIEW 80   VIEW 132  PRINT    FAX      EMAIL    MARK
.P       END       INSERT    LDELETE   PREV PG  NEXT PG  INQUIRY  ABORT
```

Report Capture View Function Keys

TOP RPT – The TOP REPORT function is available by clicking on the 'TOP RPT' button or by pressing the <Shift+F1> function key. This function will bring the user to the top of the report.

END RPT – The END REPORT function is available by clicking on the 'END RPT' button or by pressing the <Shift+F2> function key. This function will bring the operator to the end of the report.

VIEW 80 – The VIEW 80 function is the default viewing mode, 80 columns of data. It is available by hitting <RETURN>, clicking on the 'VIEW 80' button, pressing the <Shift+F3> function key, or by typing V80 and hitting <RETURN>.

VIEW132 – The VIEW 132 function is available by clicking on the 'VIEW 132', pressing the <shift+f4> function key, or by typing V132 and hitting <RETURN>. This will display the screen output in 132 columns of data.

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le Edit View Tools Reset Window Help                                    _ |ð
    PAGE    1                    INVENTORY STOCK STATUS BY BRANCH BY PROD

      WHSE: 001--NEW YORK

M NO                            BEGIN!RECEIPTS!   SALES!RETURNS!ADJUSTS!CON
  PRODUCT DESCRIPTION              !  & PROD!   MTD !     !& TRANS! &
                                ---------------------------------------------
                                   !       !       !       !       !
   TEST                          0!  13222!    84!   -36!     0!
                                ---------------------------------------------
   PRODUCT CLASS: 001              13222            -36
                                 0             84              0


                                   !       !       !       !       !
   ULTRA BROWN PLASTIC DESK       0!     4!    44!     0!    -5!
                                   !       !       !       !       !
   ULTRA GREEN PLASTIC DESK       0!     0!     0!     0!     0!
                                ---------------------------------------------
   PRODUCT CLASS: 101               4             0
                                 0             44             -5

elect Printer, 'A'uxiliary Port or <Return> For Default Printer :
 RPT    END RPT  VIEW 80  VIEW 132 PRINT    FAX      EMAIL    MARK
.P      END      INSERT   LDELETE  PREV PG  NEXT PG  INQUIRY  ABORT
```

PRINT – The PRINT function is available by clicking on the 'PRINT' button, typing 'P' and hitting <RETURN>, or pressing the <Shift+F5> function key. The system will display: "(S)elect Printer, 'A'uxiliary or <Return> for Default Printer".

The user can choose 'S' to select a printer (covered in next section), type 'A' to print to their auxiliary printer, or hit <RETURN> to print to the default printer.

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Report Capture View – Print Function Key continued

If the user chooses 'S' to select a printer, the user will be prompted: "Enter Printer Number or 'END':". The user can type in the printer number or hit the <F7> function key to use the lookup function to select the printer. See example.

The user will then be prompted: "Is this Print Job a Laser Form? Y/N". If it is a laser form (pick ticket, purchase order, etc.) the user would enter 'Y', if not enter 'N'.

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RC View Print Options

```
  Report Master Print Options


Print Entire Report
Print the CURRENT page only
Print from current page to BOTTOM
Cancel Print
```

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          Report Master Print Format


Set Laser Printer to Landscape Format
Set Laser Printer to Portrait Format
Do Not Change Format
```

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Report Capture View – Print Function Key continued

The Report Master Print Options will display. This is where the user can choose to print the entire report, print only the current page, print the current page to the bottom of the report, or cancel the print request.

If any of the first 3 options are selected, the system will then display the Report Master Print Format Options.

When the user chooses to either set the format to landscape or portrait, the system will prompt the user to enter the number of copies. Hit <RETURN> to accept the default of 1, or the user can choose the number of copies to print followed by hitting <RETURN>.

At this point, the system will print the report.

Notes:

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RC View Email Function

Report Master e-Mail Options

e-Mail Entire Report
e-Mail the CURRENT page only
e-Mail from current page to BOTTOM
Cancel e-Mail

MDS Report Capture Training
Guide

The EMAIL function is available by clicking on the 'EMAIL' button, typing 'M', and hitting <RETURN>, or pressing the <Shift+F7> function key. This allows the user to e-mail the selected reports as an attachment. See example.

The system will display the Report Master E-mail Options.

The user can select to e-mail the entire report, only e-mail the current page of the report, e-mail from the current page to the bottom of the report, or cancel the e-mail process.

If any of the first three options are selected, the system will bring the user to the Send Email Entry screen.

Notes:

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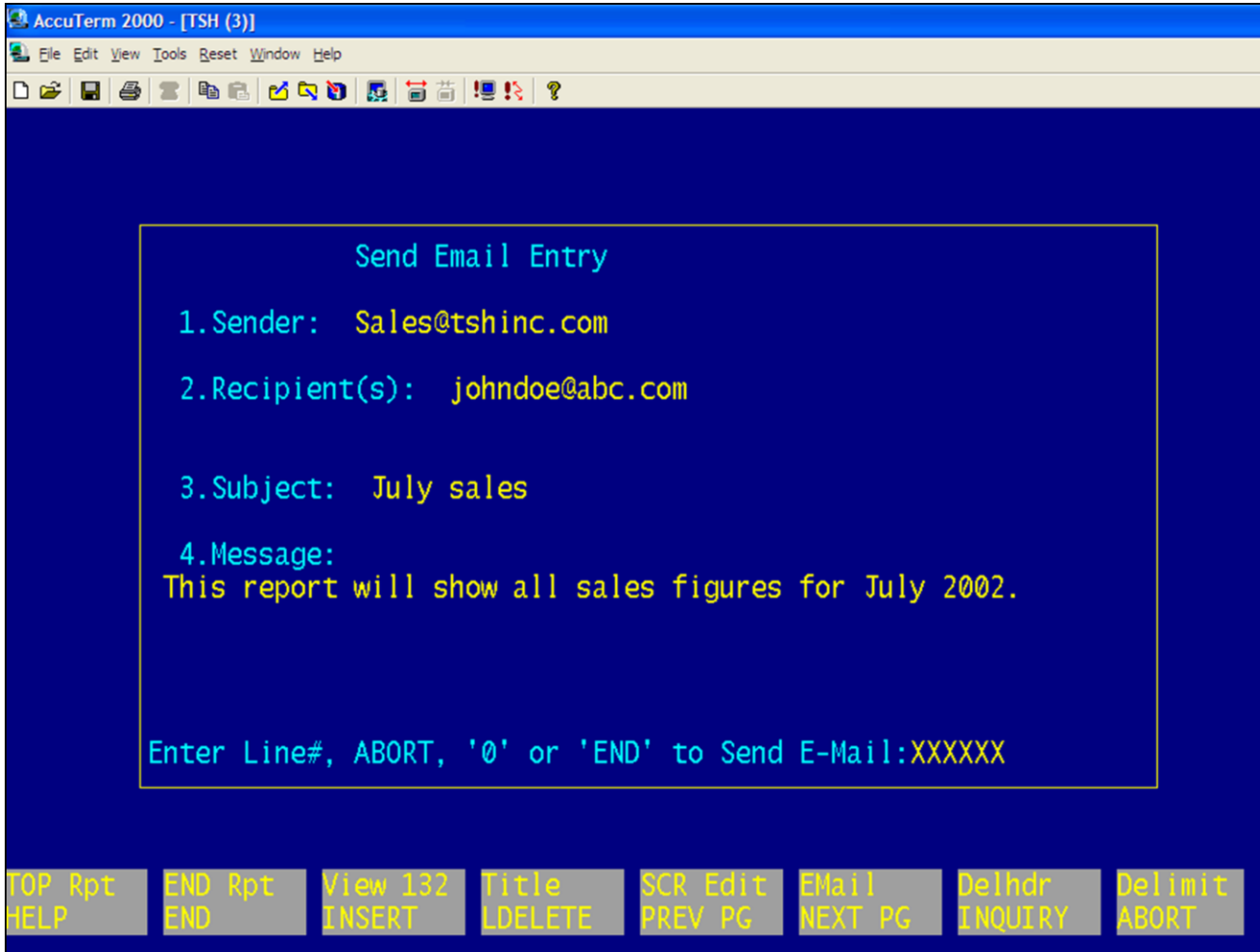
Report Capture View – E-mail Function Key continued

SENDER – Enter the sender's (user's) e-mail address. This will be the e-mail address used if the recipient chooses to reply to the e-mail being sent.

RECIPIENTS(S) – Enter the recipient(s) e-mail address. Multiple addresses need to be separated by a semicolon.

SUBJECT – Enter the reference information for this e-mail.

MESSAGE – Enter text information, if any, that will appear for this message.

ENTER LINE #, ABORT, '0' OR 'END' TO SEND E-MAIL: *XXXXXX*

Enter the line number to change. Enter 'ABORT' to end without sending the e-mail. Enter '0' to accept and send the e-mail. Enter 'END' to end out and send the e-mail.

AccuTerm 2000 - [TSH (3)]

File Edit View Tools Reset Window Help

```
                    Send Email Entry

    1.Sender:  Sales@tshinc.com

    2.Recipient(s):  johndoe@abc.com


    3.Subject:   July sales

    4.Message:
 This report will show all sales figures for July 2002.




 Enter Line#, ABORT, '0' or 'END' to Send E-Mail:XXXXX
```

TOP Rpt	END Rpt	View 132	Title	SCR Edit	EMail	Delhdr	Delimit
HELP	END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	ABORT

Notes:

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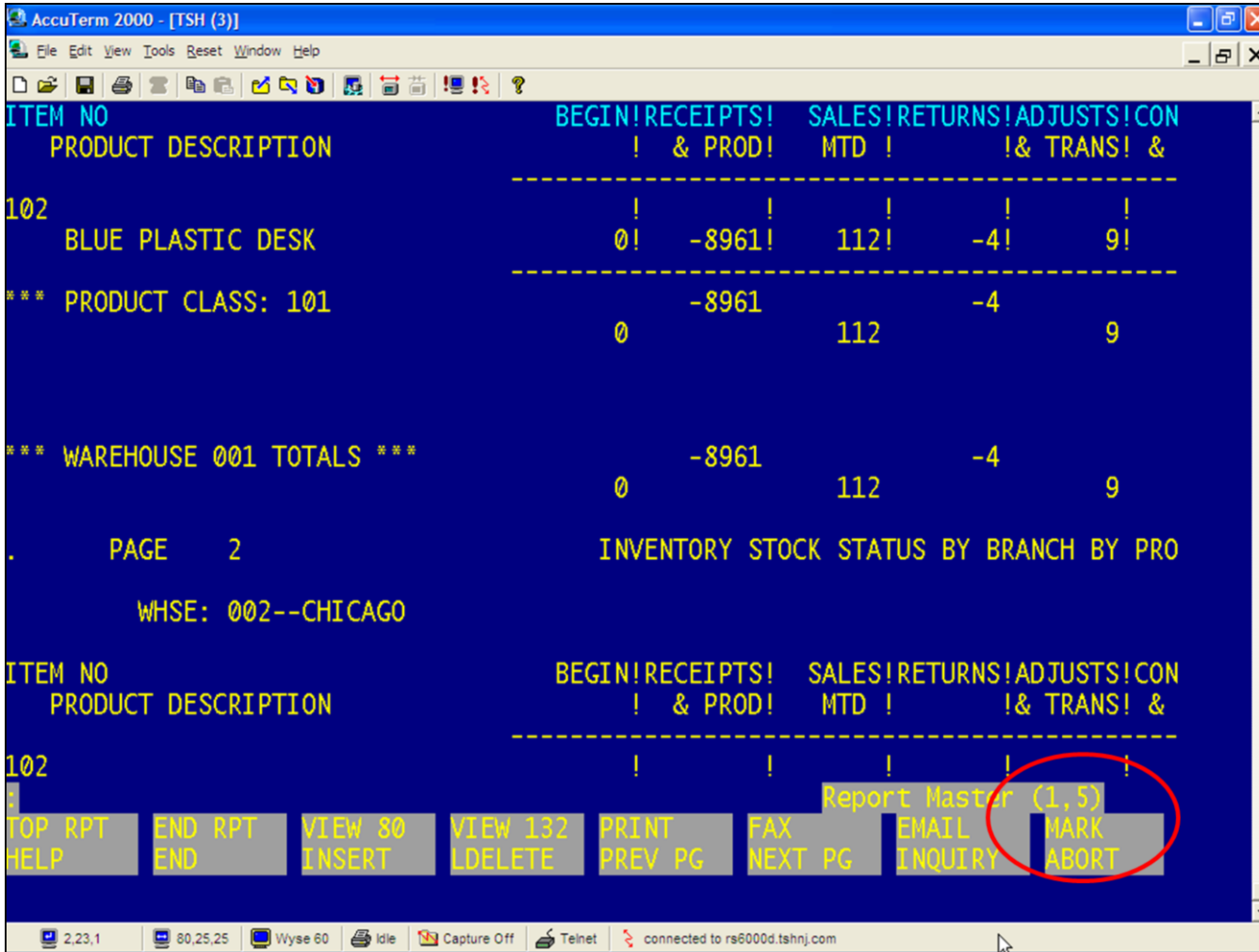
Report Capture View – Mark Function

The MARK function is available by clicking on the 'MARK' button or by pressing the <Shift+F8> function key. This function allows the user to mark the beginning and ending sections of a report to print, fax, or e-mail.

To begin, the operator would need to mark the beginning of the report to be sent. To do this, position the first line of the selection at the top of the screen and click on the 'MARK' button, or press the <Shift+F8> function key.

In this example, the marked section starts on line 5 (see the position in the lower right of screen).

Notes:

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To mark the end of the report, position the ending line at the top of the screen and click on the 'MARK' button, or press the <Shift+F8> function key. The section that was selected will be highlighted. In the example, the selected text is circled.

```
***** VOUCHER MAINTENANCE BY VENDOR *****

VENDOR#: A10000    UNION ATHLETIC WEAR        A/P BALANCE:    1733.55
    CO#:  A


LN# VOUCHER# VENDOR-INVOICE# INV-DATE DUE-DATE  GROSS-AMT  DISC-AMT    NET/OPEN
    MISC. DESCRIPTION                              BANK#   PAY-STAT    SING-CHK

 1  01000130 555            12/19/01 12/19/01    100.00     0.00       100.00
    EXPRESS MERCHANDISE                            100        P           N
 2  01000151 333333         12/24/01 12/24/01    100.00     0.00       100.00
                                                   100        P           N
 3  01000152 333334         12/24/01 12/24/01    200.00     0.00       200.00
                                                   100        P           N
 4  01000153 333333B        12/24/01 12/24/01    -15.00     0.00       -15.00
    ORDER CREDIT- PER LF                           100        P
 5  01000154 333456         12/30/01 12/30/01    549.54     0.00       549.54
    END OF YEAR SPECIALS                           100        P           N
 6  01000155 333459         12/31/01 01/01/02    799.01     0.00       799.01
                                                   100        N           N




ENTER LINE# TO CHANGE , '0' TO ACCEPT OR 'C' TO CANCEL THIS SESSION: XXXXXX
HELP      END       INSERT     LDELETE     PREV PG  NEXT PG  INQUIRY  ABORT
```

Notes:

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```
Mark (S)tarting point, (E)nding point, or (C)lear Marks:

ITEM NO                            BEGIN!RECEIPTS!  SALES!RETURNS!ADJUSTS!CON
   PRODUCT DESCRIPTION               !  & PROD!  MTD !        !& TRANS! &
                                  ----------------------------------------------
107                                  !        !      !        !        !
      TEST                        0!  13222!     84!    -36!      0!
                                  ----------------------------------------------
*** PRODUCT CLASS: 001                  13222            -36
                                  0                84               0


101                                  !        !      !        !        !
   RED PLASTIC DESK                0!  20891!    486!   -175!      6!
102                                  !        !      !        !        !
   BLUE PLASTIC DESK               0!  -8936!    127!     -5!      9!
103                                  !        !      !        !        !
   BROWN PLASTIC DESK              0!    258!     17!      0!      5!
104                                  !        !      !        !        !
   ULTRA RED PLASTIC DESK          0!  15546!    172!      0!     10!
105                                  !        !      !        !        !
   ULTRA BLUE PLASTIC DESK         0!   2703!     26!      0!      0!
                                              Report Master (1,3)
TOP RPT    END RPT    VIEW 80   VIEW 132  PRINT     FAX        EMAIL     MARK
HELP       END        INSERT    LDELETE   PREV PG   NEXT PG    INQUIRY   ABORT
```

Report Capture View – Mark Function continued

The user is able to start the marked section on any line prior to the previously marked beginning section, without having to re-mark the entire section. Also, the operator is able to end the marked section on any line following the previously marked ending section, without having to re-mark the entire marked section.

If the user attempts to have more than one line marked, the system will prompt: "Mark **S**tarting point, **E**nding point, or **C**lear Marks:"

Entering an 'S' allows the user to mark a new Starting point. Entering an 'E' allows the user to mark a new Ending point. Entering a 'C' , clears the previously marked section.

Once the user has a section highlighted, they may choose to print, fax, or e-mail the selection. The user will be given the corresponding options (print, fax, or e-mail) for the marked selection. This is covered in the next section.

Notes:

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```
          WHSE: 001--NEW YORK

ITEM NO                        BEGIN!RECEIPTS!  SALES!RETURNS!ADJUSTS!CON
   PRODUCT DESCRIPTION            ! & PROD!  MTD !       !& TRANS! &
                                 ------------------------------------------
107                               !       !       !       !       !
    TEST                        0! 13222!   84!   -36!    0!
                                 ------------------------------------------
*** PRODUCT CLASS: 001               13222           -36
                                 0            84               0


101                               !       !       !       !       !
    RED PLASTIC DESK            0! 20891!  486!  -175!    6!
102                               !       !       !       !       !
    BLUE PLASTIC DESK           0! -8936!  127!    -5!    9!
103                               !       !       !       !       !
    BROWN PLASTIC DESK          0!   258!   17!     0!    5!
104                               !       !       !       !       !
    ULTRA RED PLASTIC DESK      0! 15546!  172!     0!   10!
105                               !       !       !       !       !
    ULTRA BLUE PLASTIC DESK     0!  2703!   26!     0!    0!
'S'elect Printer, 'A'uxiliary Port or <Return> For Default Printer :
TOP RPT   END RPT   VIEW 80   VIEW 132  PRINT     FAX       EMAIL     MARK
HELP      END       INSERT    LDELETE   PREV PG   NEXT PG   INQUIRY   ABORT
```

Report Capture View – Printing a Marked Section

The user can click on the 'PRINT' button or press the <Shift+F5> function key to print the marked section. The system will display: "(S)elect Printer, 'A'uxiliary or <Return> for Default Printer".

The user can choose 'S' to select a printer(covered in next section), type 'A' to print to their auxiliary printer, or hit <RETURN> to print to the default printer.

Notes:

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```
WHSE: 001--NEW YORK

ITEM NO                              BEGIN!RECEIPTS!  SALES!RETURNS!ADJUSTS!CON
   PRODUCT DESCRIPTION                  !  & PROD!   MTD !         !& TRANS! &
                                   ---------------------------------------------
107                                     !        !        !        !        !
   TEST                             0!  13222!     84!    -36!     0!
                                   ---------------------------------------------
*** PRODUCT CLASS: 001                   13222              -36
                                   0                 84                   0


101                                     !        !        !        !        !
   RED PLASTIC DESK                 0!  20891!    486!   -175!     6!
102                                     !        !        !        !        !
   BLUE PLASTIC DES ┌────────────────────────────────────────────────────┐
103               │MDS Printer Queue Inquiry                             │
   BROWN PLASTIC DE │LAND3                                                │
104               │LAND4                                                 │
   ULTRA RED PLASTI │LAND4000                                            │
105               └────────────────────────────────────────────────────┘
   ULTRA BLUE PLASTIC DESK          0!   2703!     26!     0!     0!

TOP RPT   END RPT   VIEW 80   VIEW 132   PRINT     FAX       EMAIL     MARK
HELP      END       INSERT    LDELETE    PREV PG   NEXT PG   INQUIRY   ABORT
```

Report Capture View – Printing a Marked Section – Selecting a Printer

If the user chooses 'S' to select a printer, the user will be prompted: "Enter Printer Number or 'END':". The user can type in the printer number or hit the <F7> function key to use the lookup function to select the printer. See example.

The user will then be prompted: "Is this Print Job a Laser Form? Y/N". If it is a laser form (pick ticket, purchase order), they would answer 'Y', if not answer 'N'.

Notes:

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Report Capture View – Printing a Marked Section – Print Options

When printing only the marked section, the user would choose: "Print marked section of report".

Notes:

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The user can choose Landscape or Portrait for the print format. After choosing the format, the system will prompt the user to enter the number of copies, or hit <RETURN> to accept the default of 1.

At this point, the system will print the marked selection of the report.

```
        WHSE: 001--NEW YORK

ITEM NO                              BEGIN!RECEIPTS!   SALES!RETURNS!ADJUSTS!CON
   PRODUCT DESCRIPTION                   !  & PROD!    MTD !         !& TRANS! &
                                     --------------------------------------------
107                                      !        !        !        !        !
   TEST                                0!   13222!      84!     -36!       0!
                                     --------------------------------------------


              ┌─────────────────────────────────────────┐
              │     Report Master Print Format           │
              │                                          │
              │  Set Laser Printer to Landscape Format   │
              │  Set Laser Printer to Portrait Format    │
              │  Do Not Change Format                    │
              │                                          │
              │                                          │
              └─────────────────────────────────────────┘




   ULTRA BLUE PLASTIC DESK                0!    2703!     26!       0!       0!

TOP RPT   END RPT   VIEW 80   VIEW 132  PRINT     FAX        EMAIL     MARK
HELP      END       INSERT    LDELETE   PREV PG   NEXT PG    INQUIRY   ABORT
```

Notes:

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```
       WHSE: 001--NEW YORK

ITEM NO                          BEGIN!RECEIPTS!  SALES!RETURNS!ADJUSTS!CON
   PRODUCT DESCRIPTION              !  & PROD!  MTD !        !& TRANS! &
                                 -------------------------------------------
107                                 !         !       !        !        !
    TEST                         0!    13222!     84!     -36!      0!
                                 -------------------------------------------
*** PRODUCT CLASS: 0                                        -36
     ┌──────────────────────────────────────────────────────┐       0
     │     Report Master FAX Format                         │
     │                                                      │
     │  Set Laser Printer to Landscape Format               │
101  │  Set Laser Printer to Portrait Format        !       !
     │  Laser Form (PO,INVOICE,etc)              -175!      6!
    RED PLASTIC DESK│                                              
102  │                                              !       !
    BLUE PLASTIC DES└──────────────────────────────────      -5!      9!
103                                 !         !       !        !        !
    BROWN PLASTIC DESK             0!      258!     17!      0!      5!
104                                 !         !       !        !        !
    ULTRA RED PLASTIC DESK         0!    15546!    172!      0!     10!
105                                 !         !       !        !        !
    ULTRA BLUE PLASTIC DESK        0!     2703!     26!      0!      0!
                                                    Report Master (1,3)
TOP RPT   END RPT   VIEW 80   VIEW 132  PRINT     FAX        EMAIL     MARK
HELP      END       INSERT    LDELETE   PREV PG   NEXT PG    INQUIRY   ABORT
```

Report Capture View – Faxing a Marked Section – Fax Format

The user can click on the 'FAX' button or press the <Shift+F6> function key to fax the marked selection.

The user can choose to fax the report in Landscape format, Portrait format, or as a Laser form.

Notes:

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When faxing only the marked section, the user would choose: "Fax marked section of report".

```
       WHSE: 001--NEW YORK

ITEM NO                              BEGIN!RECEIPTS!   SALES!RETURNS!ADJUSTS!CON
   PRODUCT DESCRIPTION                   !  & PROD!    MTD !        !& TRANS! &
                                     -------------------------------------------
107                                      !        !       !        !        !
   TEST                               0!  13222!      84!     -36!      0!
                                     -------------------------------------------

              ┌──────────────────────────────────────────┐
              │      Report Master FAX Options            │
              │                                           │
              │  FAX Entire Report                        │
              │  FAX the CURRENT page only                │
              │  FAX from current page to BOTTOM          │
              │  FAX marked section of report             │
              │  Cancel FAX                               │
              │                                           │
103           │                              !        !   │
   BROWN PLASTIC DESK                 0!     258!     17!      0!      5!
104                                      !        !       !        !        !
   ULTRA RED PLASTIC DESK            0!   15546!     172!      0!     10!
105                                      !        !       !        !        !
   ULTRA BLUE PLASTIC DESK           0!    2703!      26!      0!      0!
                                                       Report Master (1,3)
TOP RPT    END RPT    VIEW 80    VIEW 132   PRINT     FAX         EMAIL      MARK
HELP       END        INSERT     LDELETE    PREV PG   NEXT PG     INQUIRY    ABORT
```

Notes:

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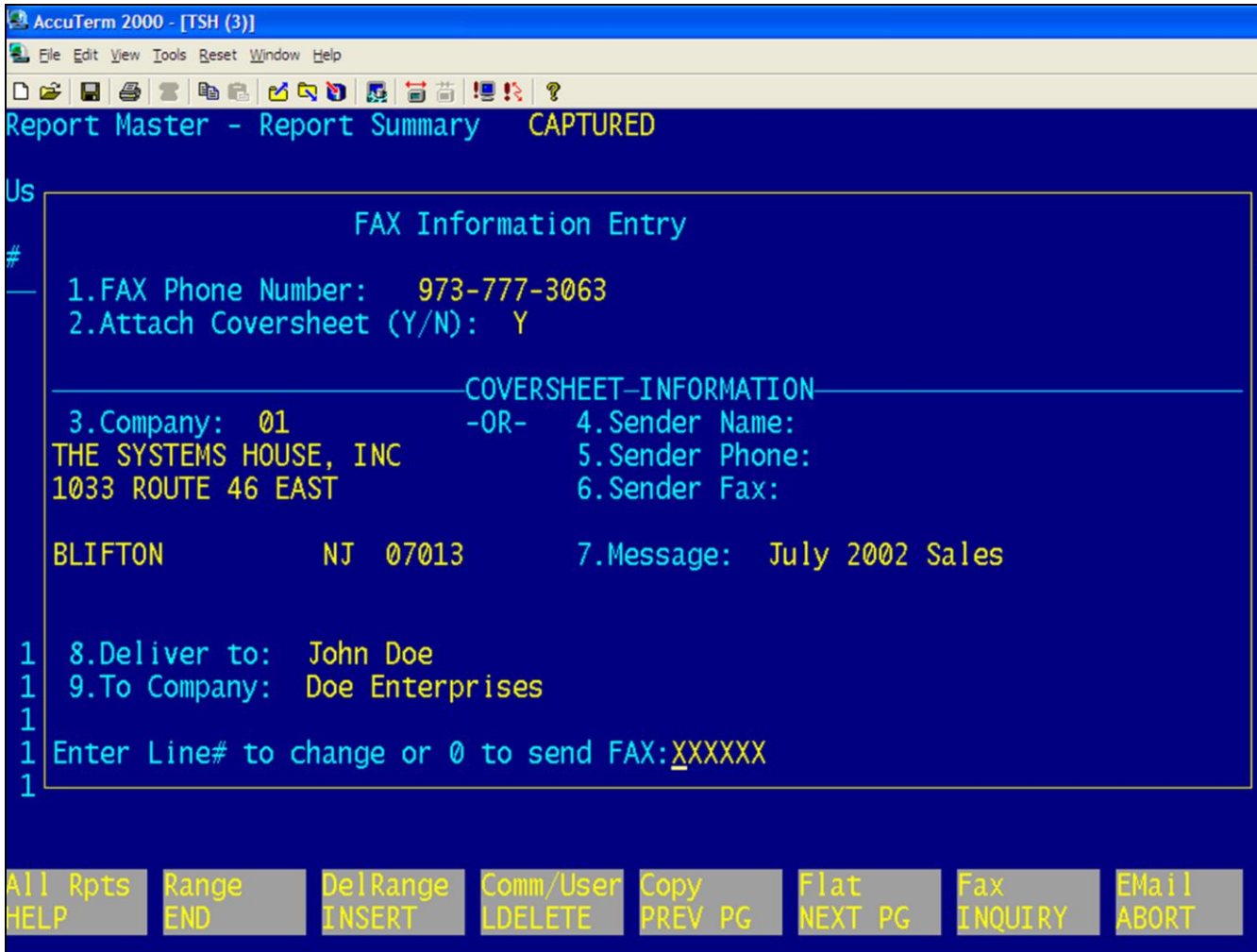
Report Capture View – Faxing a Marked Section – Fax Information Entry Screen

FAX – Enter the phone number the fax software should dial to send this fax.

ATTACH COVER SHEET – Enter 'Y' to attach a cover sheet, or 'N' to send the report only.

COMPANY – Enter a company number from the company file or <RETURN>, to enter the Sender Information.

SENDER NAME – Enter the name of the person or department sending this fax.

SENDER PHONE – Enter the phone number of the person sending this fax or the phone number to contact, in case the fax did not transmit properly.

SENDER FAX – Enter the phone number of your fax machine for any return faxes.

MESSAGE – Enter a message, which will appear on the cover sheet. If the user leaves this blank, the message will read: "See Attached Report Page(s)".

DELIVER TO – Enter name of the person or department that should receive this fax.

TO COMPANY - Enter the company name that will be receiving this fax.

ENTER LINE# TO CHANGE OR '0' TO SEND FAX: *XXXXXX*

Enter the line number to change. Enter 'ABORT' to end without faxing the document. Enter '0' to accept and send the fax.

Notes:

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RC View Function Keys

- E-mailing a Marked Section
  - E-mail Options

Report Master e-Mail Options

e-Mail Entire Report
e-Mail the CURRENT page only
e-Mail from current page to BOTTOM
e-Mail marked section of report
Cancel e-Mail

MDS Report Capture Training
Guide

The user can click on the 'EMAIL' button or press the <Shift+F7> function key to e-mail the marked selection.
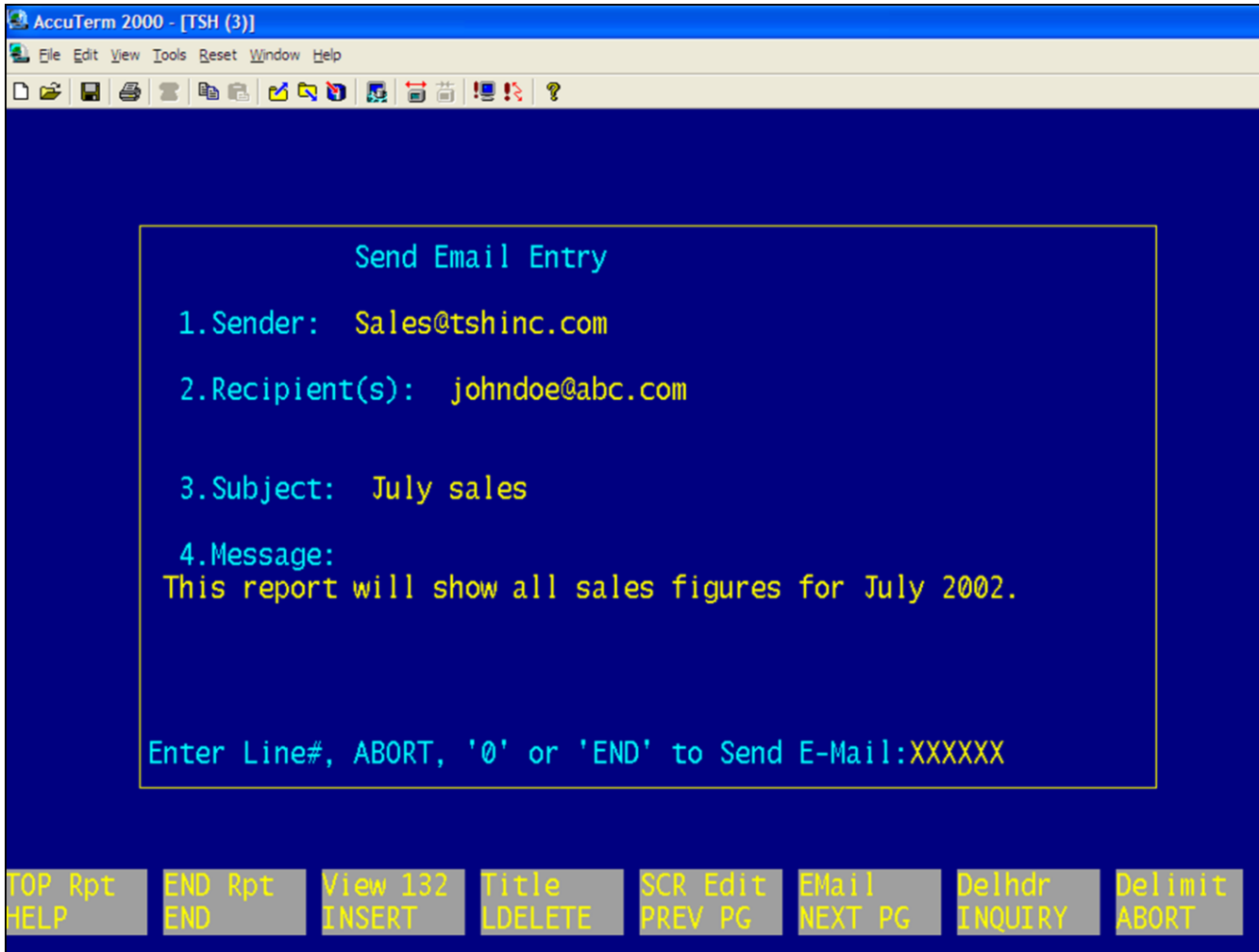When e-mailing only the marked section, the user would choose: "E-mail marked section of report".

Notes:

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Report Capture View – E-mailing a Marked Section – Send E-mail Entry

SENDER – Enter the sender's (user's) e-mail address. This will be the e-mail address used if the recipient chooses to reply to the e-mail being sent.

RECIPIENT – Enter the recipient(s) e-mail address. Multiple addresses need to be separated by a semicolon.

SUBJECT – Enter the reference information for this e-mail.

MESSAGE – Enter text information, if any, that will appear for this message.

ENTER LINE#, ABORT, '0' OR 'END' TO SEND E-MAIL:*XXXXXX*

Enter the line number to change. Enter 'ABORT' to end without sending the e-mail. Enter '0' to accept and send the e-mail. Enter 'END' to end out and send the e-mail.

```
AccuTerm 2000 - [TSH (3)]
File  Edit  View  Tools  Reset  Window  Help

                    Send Email Entry

    1.Sender:   Sales@tshinc.com

    2.Recipient(s):   johndoe@abc.com


    3.Subject:   July sales

    4.Message:
  This report will show all sales figures for July 2002.




 Enter Line#, ABORT, '0' or 'END' to Send E-Mail:XXXXXX


TOP Rpt    END Rpt    View 132   Title      SCR Edit   EMail      Delhdr     Delimit
HELP       END        INSERT     LDELETE    PREV PG    NEXT PG    INQUIRY    ABORT
```

Notes:

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RC Flatfile Templates Overview

MDS Report Capture Training Guide

Notes:

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Report Capture Flatfile Templates Maintenance

Overview

Report Capture Flatfile generation depends upon the setup of templates which define how the report is defined into columns for Excel. This feature is designed to create columns for Excel spreadsheets, but could be used to create flat delimited or fixed length files for other applications to import as well.

There are two ways to maintain the templates. One method is by manually entering in the information into the template. Column positions can be determined using a printout of the report. The other method is by running the report to Report Capture and using the visual screen mode of defining the report columns. Either way, the same pieces of information need to be inputted into the system.

When planning the report, the user should know in advance what results they want to come out of the report and go into the flatfile. Then the operator will need to know how to breakdown a report to get that information.

Expected Results:

1. A Title (optional), which will go into cell A1 in the Excel spreadsheet.

2. Column headings (optional), which will go into row 1 (or row 2 if a title is specified) for each column in the Excel spreadsheet.

3. The Detail data, which will appear in the column format in the cells of the spreadsheet.

4. The Totals, which will appear at the appropriate point in the Excel spreadsheet. Since totals can be calculated in Excel, this

is optional.

Notes:

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```
┌─────────────Custom Report Flatfile Template Maintenance─────────────┐
│ Template ID:  LORI.TEST              Report:  RC.FAX.CONFIRM010      │
│                 ─Report─Heading─Deletion─Parameters─                 │
│  1.Heading Type:        P    PAGE LENGTH                             │
│  2.Page Length:         57          5.Delete (records listed):  Y    │
│  3.Heading Length:       8          6.Remove Blank Lines:        Y    │
│  4.Column Header Lines: Y           7.Use Column Descriptions:        │
│    Begin:   7   End:   7                                             │
│                 ─Flatfile─Definition─Parameters─                    │
│  8.Field Delimiter:    009               Data SAVE Overrides         │
│  9.Record Delimiter:                11.File:  TMP                    │
│ 10.Trim Blanks Option:  B           12.Item:  FAXX                   │
│                 ─Column─Definition─Parameters─                      │
│      DETAIL LINES                         HEADER LINES               │
│ 13.Number of DETAIL lines:   1      15.Number of HEADER lines:   1   │
│ 14.Column  Begin  Ending  Line Trim 16.Column Begin Ending Line Depth Trim│
│      1       1      30      1           1      1      11    01     1 │
│      2      32      46      1           2     32      40    01     1 │
│      3      48      56      1           3     48      56    01     1 │
│      4      58      67      1           4     58      63    01     1 │
│      5      69      80      1           5     69      80    01     1 │
└─────────────────────────────────────────────────────────────────────┘
ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT  :XXXXXX    PAGE  1 OF  3
┌────────┐┌────────┐┌────────┐┌────────┐┌────────┐┌────────┐┌────────┐┌────────┐
│VISUAL  ││        ││        ││        ││        ││        ││        ││        │
│HELP    ││  END   ││ INSERT ││LDELETE ││PREV PG ││NEXT PG ││INQUIRY ││ ABORT  │
└────────┘└────────┘└────────┘└────────┘└────────┘└────────┘└────────┘└────────┘
```

Notes:

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Report Capture Flatfile Templates Maintenance – Manual

This program allows the operator to define all of the information they require to process their report.

TEMPLATE ID – Enter the name of the template. This TEMPLATE ID will show in the Inquiry from Report Capture at the "Enter Template or NEW" prompt.

REPORT – This identifies the report this template is used for. There are two ways the user can set this up:

1. Type the word "MENU" and the operator will be prompted for the menu path to the report. The system will determine the internal report name from the menu path.

2. Go to the menu option and use the ^ to display the menu option information. Take the statement and replace all spaces with periods. If the user knows that it is a BASE.PROK or PROK file item, they can use the name of the proc. If the type is equal to an 'R' type, the user can use the name of the report. If the user chooses the option from Report Capture to make a new template, this step is already completed.

HEADING TYPE – 'C'ontrol character or 'P'age Length. The user will need to check the report code/prok for this information. Most of the MDS reports are control character paged. Recall Reports are this way by default. Other reports that use HEADING and PAGE statements are this way. Only Line Counted reports would use Page Length. This tells the program how to determine the top of each page to remove the page headings.

PAGE LENGTH – Enter the page length,. This is only required if the Heading Type is set to 'P' for Page Length.

HEADING LENGTH – Enter the heading length. This field tells the program how many lines to strip off of each page. This is a required field.

Notes:

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```
┌─────────Custom Report Flatfile Template Maintenance─────────┐
│ Template ID:  LORI.TEST              Report:  RC.FAX.CONFIRM010 │
│ ─────────────Report─Heading─Deletion─Parameters───────────── │
│ 1.Heading Type:       P    PAGE LENGTH                        │
│ 2.Page Length:        57        5.Delete (records listed):  Y │
│ 3.Heading Length:      8        6.Remove Blank Lines:       Y │
│ 4.Column Header Lines: Y        7.Use Column Descriptions:    │
│    Begin:   7   End:   7                                      │
│ ─────────────Flatfile─Definition─Parameters───────────────── │
│ 8.Field Delimiter:    009           Data SAVE Overrides       │
│ 9.Record Delimiter:              11.File:  TMP                │
│ 10.Trim Blanks Option:  B        12.Item:  FAXX               │
│ ─────────────Column─Definition─Parameters─────────────────── │
│      DETAIL LINES                      HEADER LINES           │
│ 13.Number of DETAIL lines:  1   15.Number of HEADER lines:  1 │
│ 14.Column  Begin  Ending  Line Trim  16.Column Begin Ending Line Depth Trim │
│     1       1      30      1  1         1      1    11   01    1   │
│     2      32      46      1  1         2     32    40   01    1   │
│     3      48      56      1  1         3     48    56   01    1   │
│     4      58      67      1  1         4     58    63   01    1   │
│     5      69      80      1  1         5     69    80   01    1   │
│                                                                │
│ ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :XXXXXX   PAGE  1 OF  3 │
│ VISUAL                                                         │
│ HELP    END    INSERT   LDELETE  PREV PG  NEXT PG  INQUIRY  ABORT │
└────────────────────────────────────────────────────────────┘
```

Notes:

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Report Capture Flatfile Templates Maintenance – Manual continued

COLUMN HEADER LINES – Enter 'Y' or 'N' to use or not use the printed column headings. The user may enter their own headings or have no headings. Enter the beginning or ending lines of the report to save for column headings.

DELETE (records listed) – Enter 'Y' or 'N' to delete the "### records listed" message generated from recall listings. The system default is 'Y'.

REMOVE BLANK LINES – Enter 'Y' or 'N' to remove all the lines that are completely blank. The user may leave them in for spacing. The system default is 'Y'.

USE COLUMN DESCRIPTIONS – Enter 'Y' or 'N'. If the user specified no column headings from the report, they may specify whether to include the column descriptions as the headings. If they answer 'N'o to both places, the Excel spreadsheet will have no column headings at all.

FIELD DELIMITER – Specify the ASCII character code (3 numeric), 'TAB', or ','(comma). This is the delimiter the program will place between the columns in the flatfile. Excel will recognize the TAB character and import the columns automatically. If the field delimiter is not specified here, the file will be fixed length fields, padded with blanks. **NOTE: 009** is the ASCII character for the TAB, once the user types in TAB, the system converts it to the internal character.

RECORD DELIMITER – Leave this blank unless there is a specific record delimiter needed. This field will accept the 3 digit ASCII character code if necessary. This is the same as in ODBC or English Report Generator.

TRIM BLANKS OPTION – Not all data is the same length in a field. The system allows the user the option to trim off leading blanks, trailing blanks, both, or none. Fixed length fields assumes none, it will pad anyway. The default is BOTH.

```
┌─────────────Custom Report Flatfile Template Maintenance────────────┐
│ Template ID:  LORI.TEST              Report:  RC.FAX.CONFIRM010     │
│ ──────────────Report-Heading-Deletion-Parameters──────────────     │
│  1.Heading Type:        P    PAGE LENGTH                            │
│  2.Page Length:             57        5.Delete (records listed):  Y │
│  3.Heading Length:           8        6.Remove Blank Lines:        Y │
│  4.Column Header Lines:  Y            7.Use Column Descriptions:    │
│     Begin:   7   End:   7                                           │
│ ──────────────Flatfile-Definition-Parameters──────────────          │
│  8.Field Delimiter:     009              Data SAVE Overrides        │
│  9.Record Delimiter:                 11.File:  TMP                  │
│ 10.Trim Blanks Option:  B            12.Item:  FAXX                 │
│ ──────────────Column-Definition-Parameters──────────────            │
│       DETAIL LINES                       HEADER LINES               │
│ 13.Number of DETAIL lines:  1      15.Number of HEADER lines:  1    │
│ 14.Column  Begin  Ending  Line Trim 16.Column Begin Ending Line Depth Trim │
│      1       1      30     1           1      1    11    01     1   │
│      2      32      46     1           2     32    40    01     1   │
│      3      48      56     1           3     48    56    01     1   │
│      4      58      67     1           4     58    63    01     1   │
│      5      69      80     1           5     69    80    01     1   │
│                                                                     │
├─────────────────────────────────────────────────────────────────────┤
│ ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT  :XXXXXX  PAGE 1 OF 3 │
│ VISUAL                                                              │
│ HELP     END     INSERT    LDELETE   PREV PG  NEXT PG  INQUIRY  ABORT │
│                                                                     │
└─────────────────────────────────────────────────────────────────────┘
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Notes:

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Report Capture Flatfile Templates Maintenance – Manual continued

FILE – Enter the name of the file the delimited record is written to when it is processed. If this field is left blank, the user will be prompted each time to enter the filename. It is a good idea to setup this field if you intend to download or e-mail the report.

ITEM – Enter in the Item Key for the delimited record. If blank, the user will be prompted each time (See above).

DETAIL LINES SECTION

NUMBER OF DETAIL LINES – The number of lines each detail record uses on the report. The default is 1. **NOTE:** ALL details must use the same number of lines or this will not work.

DETAIL DATA COLUMNS (MULTI-VALUED)

COLUMN –The column number, It is recommended to use sequential numbers.

BEGIN – The beginning column number on the printout where the data begins. Verify that this is the beginning of the column, and not just the piece of data.

ENDING – The ending column position for this data field on the printout.

LINE – The detail data line number, 1 to a number of lines. Specify which line of the detail data contains the data for this column.

TRIM – Trim option, L, T, B, or N (leading, trailing, both, none) overrides

the TRIM BLANKS OPTION (#10) above, **ONLY FOR THIS COLUMN.**

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```
┌─────────────Custom Report Flatfile Template Maintenance─────────────┐
│ Template ID: LORI.TEST              Report:  RC.FAX.CONFIRM010       │
│               ──Report─Heading─Deletion─Parameters──                │
│  1.Heading Type:        P    PAGE LENGTH                            │
│  2.Page Length:            57         5.Delete (records listed):  Y │
│  3.Heading Length:          8         6.Remove Blank Lines:        Y │
│  4.Column Header Lines:  Y            7.Use Column Descriptions:     │
│    Begin:   7   End:    7                                           │
│               ──Flatfile─Definition─Parameters──                    │
│  8.Field Delimiter:     009              Data SAVE Overrides         │
│  9.Record Delimiter:                  11.File:   TMP                 │
│ 10.Trim Blanks Option:  B             12.Item:   FAXX                │
│               ──Column─Definition─Parameters──                      │
│      DETAIL LINES                         HEADER LINES               │
│ 13.Number of DETAIL lines:   1      15.Number of HEADER lines:   1   │
│ 14.Column  Begin  Ending  Line Trim 16.Column Begin Ending Line Depth Trim │
│     1        1      30      1            1       1     11   01      1 │
│     2       32      46      1            2      32     40   01      1 │
│     3       48      56      1            3      48     56   01      1 │
│     4       58      67      1            4      58     63   01      1 │
│     5       69      80      1            5      69     80   01      1 │
│                                                                     │
├─────────────────────────────────────────────────────────────────────┤
│ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT  :XXXXXX  PAGE  1 OF  3 │
│VISUAL                                                               │
│HELP      END      INSERT    LDELETE   PREV PG  NEXT PG  INQUIRY  ABORT │
└─────────────────────────────────────────────────────────────────────┘
```

Notes:

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Report Capture Flatfile Templates Maintenance – Manual continued

HEADER LINES SECTION

NUMBER OF HEADER LINES – The number of lines on the report where column headings, which will be used for Excel, exist (calculated from the Column Header Lines).

COLUMN HEADING DEFINITIONS (MULTI-VALUED)

COLUMN – Enter the column number. Match this number to the columns in the DETAIL section.

BEGIN – Enter the beginning column position in the header lines of the printout for this column.

ENDING – Enter the ending column position in the header lines for this column heading.

LINE – Enter the header line number, 1 to number of heading lines, where the heading for this column begins.

DEPTH – If the heading exists on more than one line, enter the line number it uses.

TRIM – Trim option, L, T, B, or N (leading, trailing, both, or none) overrides the TRIM BLANK OPTION above **ONLY FOR THIS COLUMN.**

```
┌─────────────Custom Report Flatfile Template Maintenance─────────────┐
│ Template ID:  CREDIT.HOLD.RPT          Report:   CREDIT.HOLD.RPT011  │
├─────────────────────────────────┬───────────────────────────────────┤
│   BREAK COLUMN DEFINITION        │   TOTALS COLUMN DEFINITION         │
│ # 17.Identifier Col  Lines  Process│ # 19.Identifier Col  Lines  Process│
│ 1  CUST          3    2       A   │ 1  COM          1    1       R     │
│ 2  ***           1    1       R   │ 2  TOT          1    1       R     │
│ 3                                 │ 3  CUST         1    1       R     │
│ 4                                 │ 4                                  │
├─────────────────────────────────┼───────────────────────────────────┤
│ 18.Column  Begin Ending Line Trim ID│ 20.Column  Begin Ending Line Trim ID│
│    1         1    11    2      1  │                                    │
│    2        12    41    2      1  │                                    │
│    3        43    61    2      1  │                                    │
│    4        63    74    2      1  │                                    │
│                                   │                                    │
└─────────────────────────────────┴───────────────────────────────────┘
ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT  :XXXXXX    PAGE  2 OF  3
┌────────┐┌────────┐┌────────┐┌────────┐┌────────┐┌────────┐┌────────┐┌────────┐
│VISUAL  ││        ││        ││        ││        ││        ││        ││        │
│HELP    ││  END   ││ INSERT ││LDELETE ││PREV PG ││NEXT PG ││INQUIRY ││ ABORT  │
└────────┘└────────┘└────────┘└────────┘└────────┘└────────┘└────────┘└────────┘
```

Report Capture Flatfile Templates Maintenance – Manual continued

Breaks and Totals

Without breaks and totals being defined in a report, the detail columns will try to grab data from them, and the results will be incorrect.

Multiple Breaks and Totals may exist in the report and each can be defined separately for processing. The user may remove lines, add the data as a new column into the appropriate detail section, or include the data as a separate line (as it appears on the report). The example uses the ORDERS ON CREDIT HOLD report to show the Break and Total logic.

Both Breaks and Totals are to be defined in this report. The definition fields are the same but the difference is the that the BREAK data occurs before the detail lines associated with it.

The TOTALS occurs after the detail lines. If the user includes the data on the detail lines, they must put the definition in the correct section to associate the data correctly.

Notes:

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```
┌─────────Custom Report Flatfile Template Maintenance─────────┐
│ Template ID:  CREDIT.HOLD.RPT          Report:   CREDIT.HOLD.RPT011   │
│                                                                        │
│    BREAK COLUMN DEFINITION          │      TOTALS COLUMN DEFINITION     │
│  # 17.Identifier Col  Lines  Process│  # 19.Identifier Col  Lines  Process│
│  1   CUST          3     2      A   │  1   COM          1     1      R   │
│  2   ***           1     1      R   │  2   TOT          1     1      R   │
│  3                                  │  3   CUST         1     1      R   │
│  4                                  │  4                                 │
│                                     │                                    │
│ 18.Column   Begin Ending Line Trim ID│ 20.Column  Begin Ending Line Trim ID│
│      1        1    11    2      1    │                                    │
│      2       12    41    2      1    │                                    │
│      3       43    61    2      1    │                                    │
│      4       63    74    2      1    │                                    │
│                                     │                                    │
│                                     │                                    │
│                                     │                                    │
│                                     │                                    │
│                                     │                                    │
│                                     │                                    │
ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT  :XXXXXX      PAGE  2 OF  3
┌────────┐┌────────┐┌────────┐┌────────┐┌────────┐┌────────┐┌────────┐┌────────┐
│VISUAL  ││        ││        ││        ││        ││        ││        ││        │
│HELP    ││ END    ││ INSERT ││ LDELETE││ PREV PG││ NEXT PG││ INQUIRY││ ABORT  │
└────────┘└────────┘└────────┘└────────┘└────────┘└────────┘└────────┘└────────┘
```

Report Capture Flatfile Templates Maintenance – Manual continued

BREAK AND TOTAL COLUMN DEFINITION – These entries are multi-valued definitions.

IDENTIFIER – Enter the Identifier. This text identifies the section. The text **MUST** appear in the same column position each time it appears on the report. It **MUST** be unique in that position. For example, 'C' in column 1 is not unique, the user would need more information to define a section.

COLUMN – Enter the Column number. This identifies the print column where the identifier starts.

LINES – Enter the number of lines to print.

PROCESS – Allowable entries are: A, R, or I. Add, Remove, or Include that data in this section. 'ADD' adds data columns to the DETAIL section with the data repeated in each Detail record. 'INCLUDE' includes the data in a separate detail line. 'REMOVE' removes the data from the report.

Notes:

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```
┌──────────────Custom Report Flatfile Template Maintenance──────────────┐
 Template ID:  CREDIT.HOLD.RPT              Report:  CREDIT.HOLD.RPT011

    BREAK COLUMN DEFINITION              │    TOTALS COLUMN DEFINITION
  # 17.Identifier Col  Lines  Process   │  # 19.Identifier Col  Lines  Process
  1   CUST          3    2       A       │  1   COM         1    1       R
  2   ***           1    1       R       │  2   TOT         1    1       R
  3                                      │  3   CUST        1    1       R
  4                                      │  4

  18.Column  Begin Ending Line Trim ID   │ 20.Column  Begin Ending Line Trim ID
      1        1    11     2      1       │
      2       12    41     2      1       │
      3       43    61     2      1       │
      4       63    74     2      1       │
```

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT   :XXXXXX   PAGE 2 OF 3

| VISUAL HELP | END | INSERT | LDELETE | PREV PG | NEXT PG | INQUIRY | ABORT |

Report Capture Flatfile Templates Maintenance – Manual continued

BREAK AND TOTALS DATA DEFINITION – This is the data to be included in the spreadsheet.

COLUMN – Enter the column number. If the column is being added, it should not be a column used in the column definition. If the column is being included, indicate the data column in which to place the data.

BEGIN – Enter the beginning column position for the data.

ENDING – Enter the ending column position for the data.

LINE – Enter the line in the section where the data exists (1 to a number of lines in section).

ID – Enter the section number. The program needs to know which Break or Total section the information is coming from.

Notes:

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```
┌─────────────Custom Report Flatfile Template Maintenance─────────────┐
│ Template ID: LORI.TEST              Report:  RC.FAX.CONFIRM010       │
├─────────────────────────────────────┬───────────────────────────────┤
│ COLUMN DESCRIPTION MAINTENANCE      │ TITLE DEFINITION              │
│                                     │                               │
│  COL#  21.Column Description        │ 22.TITLE ROW    BEGIN    END  │
│   1    REPORT NAME                  │      4            1      45   │
│   2    TIME SENT                    │                               │
│   3    DATE SENT                    │                               │
│   4    STATUS                       │                               │
│   5    FAX P                        │                               │
│   6                                 │                               │
│   7                                 │                               │
│   8                                 │ 23.MANUAL TITLE:              │
│   9                                 │                               │
│  10                                 │                               │
│  11                                 │                               │
│  12                                 │                               │
│  13                                 │                               │
│  14                                 │                               │
│                                     │                               │
└─────────────────────────────────────┴───────────────────────────────┘
ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT  :XXXXXX    PAGE  3 OF  3
┌─────────┐
│VISUAL   │
│HELP     │  END     INSERT   LDELETE   PREV PG   NEXT PG   INQUIRY   ABORT
```

Report Capture Flatfile Templates Maintenance – Manual continued

Column and Title

In this section the user would define the data to be included in the spreadsheet.

COLUMN DESCRIPTION – Enter the column description name.

TITLE DEFINITION – The user can use the pre-defined report title, specify the row to start, and the beginning and ending columns. The user is also given the option to create their own by using the Manual Title option.

TITLE ROW – Enter the row number to place the title.

BEGIN – Enter the beginning column number to place the title.

END – Enter the ending column number to place the title.

MANUAL TITLE – The user can enter their own custom report title. The data entered here does not wrap from one line to the next.

Notes:

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```
LINE: ....|....1....|....2....|....3....|....4....|....5....|....6....|....7...
0001:
0002:
0003:
0004: COMPANY 01                                  CUSTOMER CREDIT HOLD REPORT (ORDE
0005:
0006:
0007:    CUST #        CUSTOMER NAME                 CONTACT NAME           PHONE NO
0008: CORBIN       CORBIN CORP                    AL PALMER            212-858-250
0009:
0010: ORD # 200011  ORDER $    448.80  OPEN $    448.80  IN-PICK $    0.00   ORD
0011: ORD # 110836  ORDER $     62.40  OPEN $     62.40  IN-PICK $    0.00   ORD
0012:
0013: CUSTOMER TOTALS ---      511.20            511.20              0.00
0014: *********************************************************************************
0015:
0016:    CUST #        CUSTOMER NAME                 CONTACT NAME           PHONE NO
0017: IDEAL        IDEAL DISTRIBUTION CO           RICHARD GALVIN       201-444-454
0018:
0019: ORD # 127917  ORDER $   262.50  OPEN $    262.50  IN-PICK $    0.00   ORD
0020:
0021: CUSTOMER TOTALS ---      262.50            262.50              0.00
:                                               Report View (1,1)
TOP Rpt   END Rpt   View 132   Title                      Delhdr    Delimit
```

Report Capture Flatfile Templates Maintenance – Visual

Report Capture allows you to take an existing report and define it as a flatfile for Excel or other applications in Windows that requires a fixed length field format or a delimited format.

The operator is able to save the template for later use, or do one-time files. Once a template is saved, the operator can process the report without entering the maintenance, and e-mail, save, or download the results. **Only** if a report format changes, will maintenance need to be done on a template.

Notes:

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```
Report Master - Report Summary   CAPTURED

Enter TEMPLATE to use, RETURN for Standard,
or 'NEW' :             XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
#    Report Name                               Date      Time      Size St
                   ┌─────Report Flatfile Templates─────┐
  1. S │ Template name                    Type    │  12:08:06  15267
  2. V │ STOCK.STATUS                     STD     │  01:52:29   4738
  3. V │ LK.STOCK.STAT                    USER    │  01:51:34   5810
  4. V │ STOCK.STAT2                      USER    │  11:34:19   4835
  5. T │ LORI.TEMP                        USER    │  10:11:40  15460
  6. T │ STOCK.STATRJ                     USER    │  10:11:21   1799
  7. T │                                          │  10:11:02   3125
  8.   │                                          │
  9.   │                                          │
 10.   └──────────────────────────────────────────┘
 11.   ┌──────────────────────────────────────────┐
 12.   │ Enter FILE NAME to copy Report :   TMP    │
       └──────────────────────────────────────────┘
 13.   ┌──────────────────────────────────────────┐
 14.   │ Enter ITEM KEY to copy Report :  ST.STAT.RJ.XLS │
 15.   └──────────────────────────────────────────┘

All Rpts  Range     DelRange  Comm/User Copy      Flat      Fax       EMail
HELP      END       INSERT    LDELETE   PREV PG   NEXT PG   INQUIRY   ABORT
 G4HELP      G0  G4END      G0  G4INSERT    G0
```

Notes:

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Report Capture Flatfile Templates Maintenance – Visual

From Report Capture, highlight the report to convert, and click on the 'FLAT' button or press the <Shift+F6> function key. If a standard template exists, the operator will be prompted:

'Enter TEMPLATE to use , RETURN for Standard, or 'NEW':

If a standard template does not exist, the prompt will be:

'Enter TEMPLATE to use or 'NEW':

The operator can enter the template name, click on the 'INQUIRY' button or press the <F7> function key to display all existing templates for the report, or enter 'NEW' to create a new template. **Note:** Type 'STD' is the standard template and 'USER' are the custom templates.

If you choose to select a template, you must then answer 'M' to maintain the user template.

Enter the filename to copy the report to, followed by hitting <RETURN>. This will be the operator's work file and also the filename when the operator chooses to SAVE the report.

Enter the Item Key to copy the report. This will be the item id of the raw report, and will be used to make the delimited record key when the operator chooses to SAVE the report (*key*.DLM)

The report will then be displayed on the screen.

```
LINE: ...|....1....|....2....|....3....|....4....|....5....|....6....|....7...
0001:       PAGE    1                         INVENTORY STOCK STATUS BY BRANCH B
0002:
0003:          WHSE: 001--NEW YORK
0004:
0005: ITEM NO                                  BEGIN!RECEIPTS!  SALES!RETURNS!ADJUS
0006:    PRODUCT DESCRIPTION                       ! & PROD!   MTD !      !& TRA
0007:                                          ----------------------------------------
0008: 107                                          !        !       !       !
0009:    TEST                                   0!    13222!    84!    -36!
0010:                                          ----------------------------------------
0011: *** PRODUCT CLASS: 001                        13222            -36
0012:                                          0                84
0013:
0014:
0015: 101                                          !        !       !       !
0016:    RED PLASTIC DESK                       0!    20896!   486!   -177!
0017: 102                                          !        !       !       !
0018:    BLUE PLASTIC DESK                      0!    -8936!   749!     -9!
0019: 103                                          !        !       !       !
0020:    BROWN PLASTIC DESK                     0!      258!   917!      0!
0021: 104                                          !        !       !       !
:                                                    Report View (1,1)
TOP Rpt    END Rpt    View 132    Title    SCR Edit  EMail     Delhdr    Delimit
HELP       END        INSERT      LDELETE  PREV PG   NEXT PG   INQUIRY   ABORT
   G4HELP      G0  G4END      G0  G4INSERT     G0
```

Notice the line numbers to the left and the Ruler on top. These are there to help the operator determine the positions of data on the report.

Also, on the bottom right, the system displays the status, which shows the operator important information regarding where they are and what they are doing. In this example, the operator is in View mode, at column 1, line 1.

Notes:

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Report Capture Flatfile Templates Maintenance – Visual – Help

The operator can click on the 'HELP' button or press the <F1> function key.

In each mode the operator is in, there is a help screen that tells them what can be done there.

Most of the options are also found in the regular Report Capture View. The operator also has the edit options (for one-time templates ONLY, the edits are not saved for processing later!).

The PICK editor is the same as ED from TCL.

The RESTORE option allows the user to restore the record to it's original state before heading deletion. It does not restore before EDITing. This is in case the operator does not like the result from the heading deletion, they can reset to check line numbers.

Notes:

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```
<SHIFT F3>              - Toggle view 80/132 columns
V80                     - View 80 columns of data
V132                    - View 132 columns of data
<SHIFT F4>              - Define Title lines
<SHIFT F5>              - Screen edit data
<SHIFT F6>              - E-Mail Delimited File
<SHIFT F7>              - Automatic Header Deletion
<SHIFT F8>              - Tag and Delimit Columns

SCREEN EDIT MODE:


Down Arrow              - Move Down One Line
Up Arrow                - Move Up One Line
Right Arrow             - Move Right
Left Arrow              - Move Left
<F5>                    - Move Up the Page
<F6>                    - Move Down the Page

<F3>                    - Insert/Replace text mode

<ctrl>D                 - Delete character
<F4>                    - Delete a line
<SHIFT-F5> - Report View Mode

Hit <RETURN> to Continue , OR PREVIOUS PAGE _
```

Report Capture Flatfile Templates Maintenance – Visual

Help Continued

The Screen editor lets the operator edit on screen like Microsoft Word does.

Notes:

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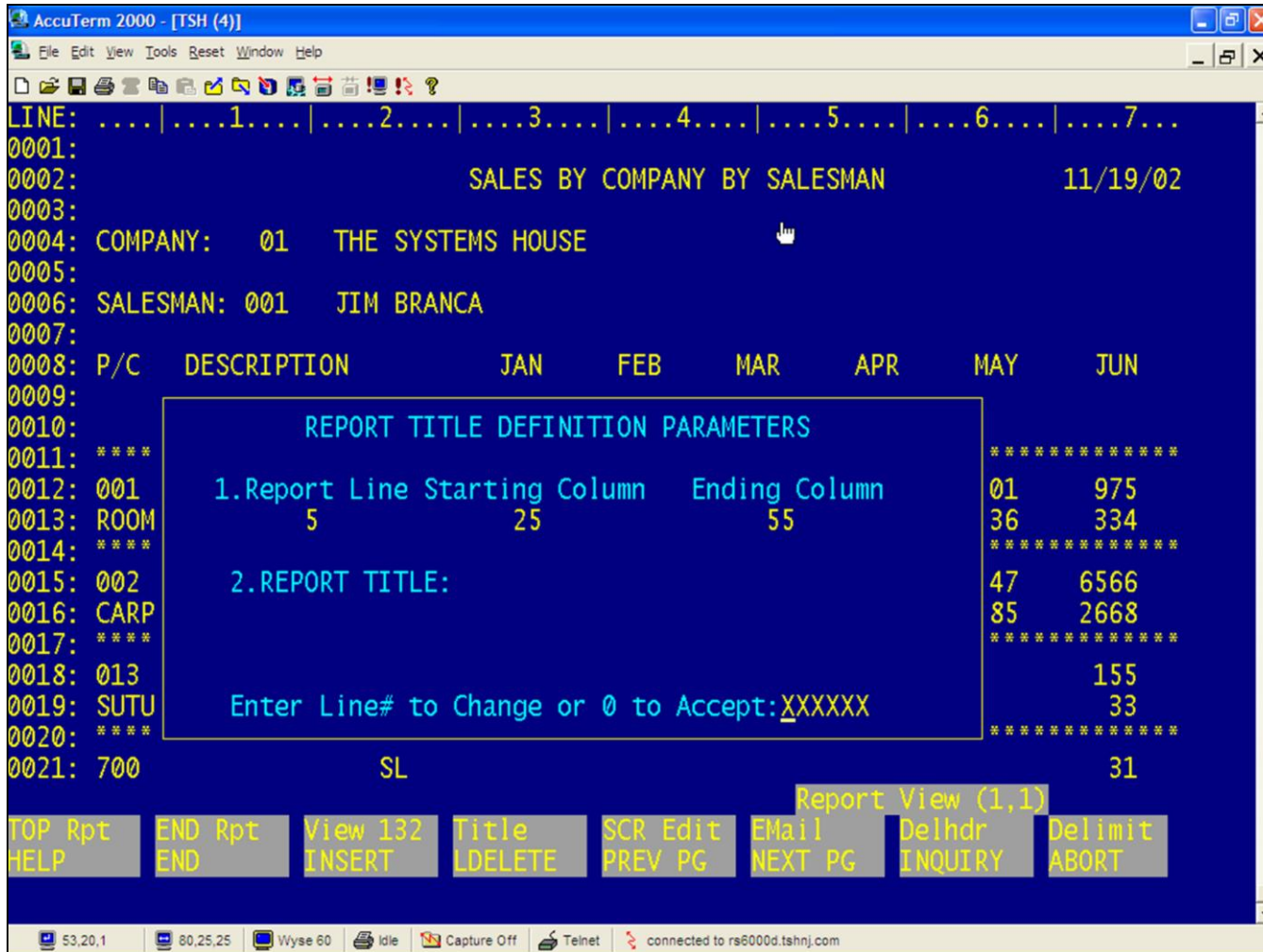
Title

In this section, the operator can define the title of the report.

Either enter the title line(s) (#1 in example) or the operator can manually enter in the report title (#2).

If the operator selects part of the report, the selected text will appear in the Report Title (#2). Enter the title prior to deleting the headers or this will not show correctly.

If the headers were already deleted, use the RESTORE function to bring back the original record to do this function.

```
AccuTerm 2000 - [TSH (4)]
File Edit View Tools Reset Window Help

LINE: ....|....1....|....2....|....3....|....4....|....5....|....6....|....7...
0001:
0002:                      SALES BY COMPANY BY SALESMAN                11/19/02
0003:
0004: COMPANY:   01   THE SYSTEMS HOUSE
0005:
0006: SALESMAN: 001   JIM BRANCA
0007:
0008: P/C   DESCRIPTION              JAN     FEB     MAR     APR     MAY     JUN
0009:
0010:             REPORT TITLE DEFINITION PARAMETERS
0011: ****                                                         *************
0012: 001   1.Report Line Starting Column   Ending Column    01      975
0013: ROOM         5              25                   55     36      334
0014: ****                                                         *************
0015: 002      2.REPORT TITLE:                              47      6566
0016: CARP                                                   85      2668
0017: ****                                                         *************
0018: 013                                                          155
0019: SUTU      Enter Line# to Change or 0 to Accept:XXXXXX          33
0020: ****                                                         *************
0021: 700              SL                                           31
                                                    Report View (1,1)
TOP Rpt   END Rpt   View 132   Title    SCR Edit  EMail    Delhdr    Delimit
HELP      END       INSERT     LDELETE  PREV PG   NEXT PG  INQUIRY   ABORT

53,20,1   80,25,25   Wyse 60   Idle   Capture Off   Telnet   connected to rs6000d.tshnj.com
```

Notes:

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```
File  Edit  View  Tools  Reset  Window  Help                                    _ 8 X
LINE: ....|....1....|....2....|....3....|....4....|....5....|....6....|....7...
0001:
0002:                                                                11/19/02
0003:          REPORT HEADING DELETION PARAMETERS
0004: COMP
0005:               Heading Type: CONTROL CHAR
0006: SALE
0007:                1.Page Length          57
0008: P/C                                                     AY    JUN
0009:                2.Heading length:        6
0010:
0011: ****          3.Column Header Lines:    N           *************
0012: 001              Start:      End:                   01     975
0013: ROOM             Use Column Descriptions: Y         36     334
0014: ****                                                *************
0015: 002           4.Delete (records listed): Y          47    6566
0016: CARP                                                 85    2668
0017: ****          5.Remove Blank Lines       Y          *************
0018: 013                                                        155
0019: SUTU     Enter Line# to Change or 0 to Accept:XXXXXX        33
0020: ****                                                *************
0021: 700              SL                                         31
                                              Report View (1,1)
TOP Rpt   END Rpt   View 132   Title    SCR Edit   EMail    Delhdr    Delimit
HELP      END       INSERT     LDELETE  PREV PG    NEXT PG  INQUIRY   ABORT
 G4HELP       G0  G4END     G0  G4INSERT    G0

  53,20,1      80,25,25   Wyse 60   Idle   Capture Off   Telnet   connected to rs6000d.tshnj.com
```

Notes:

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Deleting Headers

To delete headers from the report, click on the 'DELHDR' button or press the <Shift+F7> function key.

1. **Page Length –** This is the default page length, the operator is unable to maintain this field.

2. **Heading Length –** Enter the number of heading lines to be deleted from each page of this report.

3. **Column Header Lines:** Do you want to save any of the heading lines from page 1 as column headings? If so enter 'Y' and you will be prompted for range of line numbers to save. Otherwise enter 'N'.

    1. **Start –** Enter the Starting line to save as a Column heading.

    2. **End –** Enter the Ending line to save as a column heading.

4. **Delete (records listed) –** Do you want to delete the "### records listed." line from this report if it exists? Valid answers are: 'Y' or 'N'.

5. **Remove Blank Lines –** Do you want to remove any blank lines? Valid answers are: 'Y' or 'N'.

Enter Line# to Change or '0' to Accept:

Enter a line number to change or '0' to

accept.

Notes:

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```
LINE: ....|....1....|....2....|....3....|....4....|....5....|....6....|....7...
0001: P/C    DESCRIPTION          JAN      FEB      MAR      APR      MAY      JUN
0002: ****************************************************************************
0003: 001               SL     1265     4039     1510     3101     3101      975
0004: ROOM DEODORIZERS   GP      586     1871      699     1231     1436      334
0005: ****************************************************************************
0006: 002               SL     8410     6221     7488     3940     4147     6566
0007: CARPET CLEANERS    GP     3416     2527     3042     1403     1685     2668
0008: ****************************************************************************
0009: 013               SL                                                   155
0010: SUTURES           GP                                                    33
0011: ****************************************************************************
0012: 700               SL                                                    31
0013: ** INVALID **      GP                                                    12
0014: ****************************************************************************
0015: 710               SL                                                  4016
0016: SUTURES           GP                                                   707
0017: ****************************************************************************
0018: SALESMAN: 001      SL     9674    10260     8998     7040     7248    11743
0019: TOTAL             GP     4002     4398     3741     2634     3121     3753
0020: P/C    DESCRIPTION          JAN      FEB      MAR      APR      MAY      JUN
0021: ****************************************************************************
                                                   Report View (1,1)
TOP Rpt   END Rpt   View 132   Title    SCR Edit   EMail    Delhdr    Delimit
HELP      END       INSERT     LDELETE  PREV PG    NEXT PG  INQUIRY   ABORT
  G4HELP       G0  G4END       G0  G4INSERT    G0
```

Report Capture Flatfile Templates Maintenance – Visual

Results

Shown in the example is the report with the headers deleted.

Notes:

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Delimit

It is suggested that you check out the totals and other information here as once you are in DELIMIT mode, you cannot page the report. You can return to the VIEW mode at any time, from the DELIMIT mode by clicking on the 'SCR VIEW' button or by pressing the <Shift+F8> function key.

When in VIEW mode, to access the DELIMIT mode, click on the 'DELIMIT' button or press on the <Shift+F8> function key.

Note the Action request in the lower left hand corner. The line you are working with is highlighted on the display, but it is not a detail line. The BREAK sections need to be setup first so you can see the detail data as it is chosen.

The first question the system prompts is: : "Enter number of PRINT lines in each DETAIL: 1 ".

The default is 1, in this example, we want to use 2, so simply enter '2' and hit <RETURN>.

Notes:

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Report Capture Flatfile Templates Maintenance – Visual

Define

Click on the 'DEFINE' button or press the <Shift+F7> function key to choose the section to define.

If the operator is using heading lines, the option will be available, as shown in the example.

Notes:

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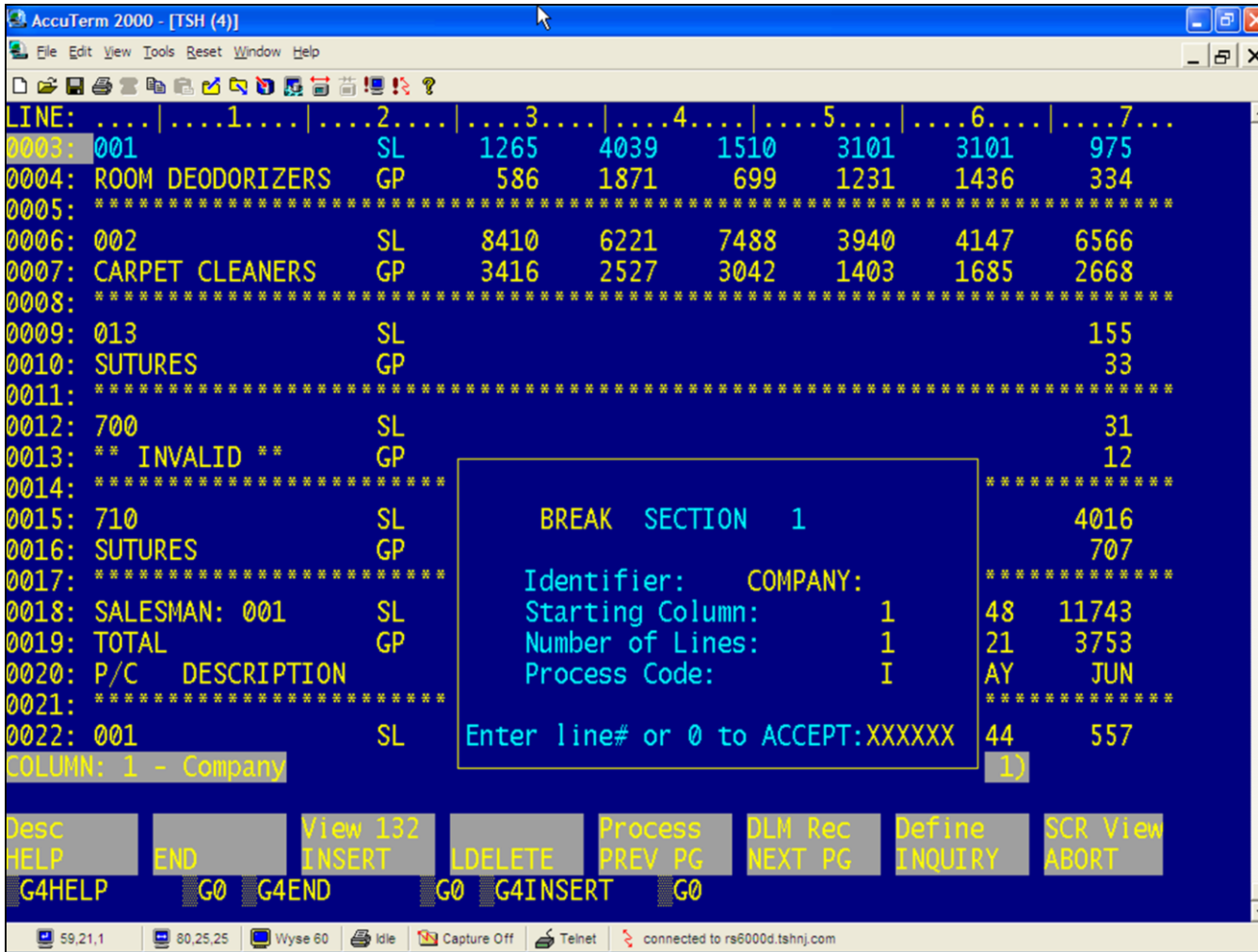
Report Capture Flatfile Templates Maintenance – Visual

Define – Break Section

In this section we are defining the Break section.

Identifier – Enter the Identifier. This text identifies the section. The text MUST appear in the same column position each time it appears on the report. It also must be given a unique name. For example, 'C' is not unique, the operator would need to supply more information to define the section.

Starting Column – Enter the starting column number. This identifies the print column where the identifier starts.

Number of Lines – Enter the number of lines to print.

Process Code – Allowable entries are A, R, or I. Add, Remove, or Include that data in this section. 'ADD' adds the data columns to the DETAIL section with the data repeated in each Detail record. 'REMOVE' removes the data from the report. Lastly, 'INCLUDE' includes the data in a separate detail line.

In the example, we are defining 4 sections:

Company, Salesman, and P/C

When completed entering in all the BREAK sections, press the <F2> function key and '0' to accept.

Notes:

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Report Capture Flatfile Templates Maintenance – Visual

Define – Break Section

Column Definition

Note the status at the bottom of the screen. This tells the operator that they are ready to define column 1, it is a NEW column (not defined in any section yet). Also notice in the bottom right hand corner that the operator is in BREAK section 1, LINE 1 (this is the highlighted line at the top of the page.

The program is waiting for the operator to MARK the beginning column. To view the mode the operator is in, look at the bottom right hand corned. In this example, the operator is in Column Definition mode at position 1,3.

First, give your column a name by pressing on the <Shift+F1> function key. You will be prompted at the bottom of the screen. The first column can be named "Company".

If you do not put a title in the column, the default is: COL#. You can redefine the column description any time using the <Shift+F1> function keys.

Notes:

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Define – Break Section

```
AccuTerm 2000 - [TSH (4)]
File  Edit  View  Tools  Reset  Window  Help

LINE:  ....|....1....|....2....|....3....|....4....|....5....|....6....|....7...
0033:  COMPANY:    01        SL     21886    14462    14258    11094    15252    22021
0034:  TOTAL                 GP      9075     6233     6027     4302     6501     7893
0035:  P/C    DESCRIPTION            JAN      FEB      MAR      APR      MAY      JUN
0036:  GRAND                 SL     21886    14462    14258    11094    15252    22021
0037:  TOTAL                 GP      9075     6233     6027     4302     6501     7893
0038:
0039:
0040:
0041:
0042:
0043:
0044:
0045:
0046:
0047:
0048:
0049:
0050:
0051:
0052:
COLUMN: 1 - Company                                  (BREAK: 1, LINE: 1)
MARK BEGINNING OF COLUMN                             Column Definition (1,3)
TOP Rpt    END Rpt    View 132    Title      Process    DLM Rec    Define     SCR View
HELP       END        INSERT      LDELETE    PREV PG    NEXT PG    INQUIRY    ABORT
 G4HELP       G0   G4END       G0   G4INSERT     G0

7,1,1    80,25,25    Wyse 60    Idle    Capture Off    Telnet    connected to rs6000d.tshnj.com
```

Now the column needs to be defined. This can be done in 2 ways:

1. If you have your mouse switched on, you may click the beginning and ending column position anywhere on the screen. The line you are working with is **always** the highlighted line.

2. You can move the cursor along the line ruler on the top of your screen and use the '[' and ']' to mark the beginning and ending positions.

To move to the next column use the TAB key. You may return to the previous column by entering '<' ('>' also works to move to the next column).

REMEMBER: The line you are working with is ALWAYS the highlighted (dimmed) line.

When you are done marking the column, it will appear highlighted on the active line.

Notes:

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Report Capture Flatfile Templates Maintenance – Visual

Define – Detail Section

In this section we are defining the Detail section.

Define the columns in the same way in all sections, either with the mouse or '[' and ']'.

With multiple detail lines, use the up and down arrows to move between them.

Notes:

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Report Capture Flatfile Templates Maintenance – Visual

Define – Totals Section

In this section we are defining the Totals section.

In this example, I am defining 2 Totals:

GRAND: col:1 lines:2 code:R

TOTAL: col:1 lines:1 code:R

Since Excel can total the report for me, I am removing the two totals.

Codes:

R= Remove

A= Add data to detail
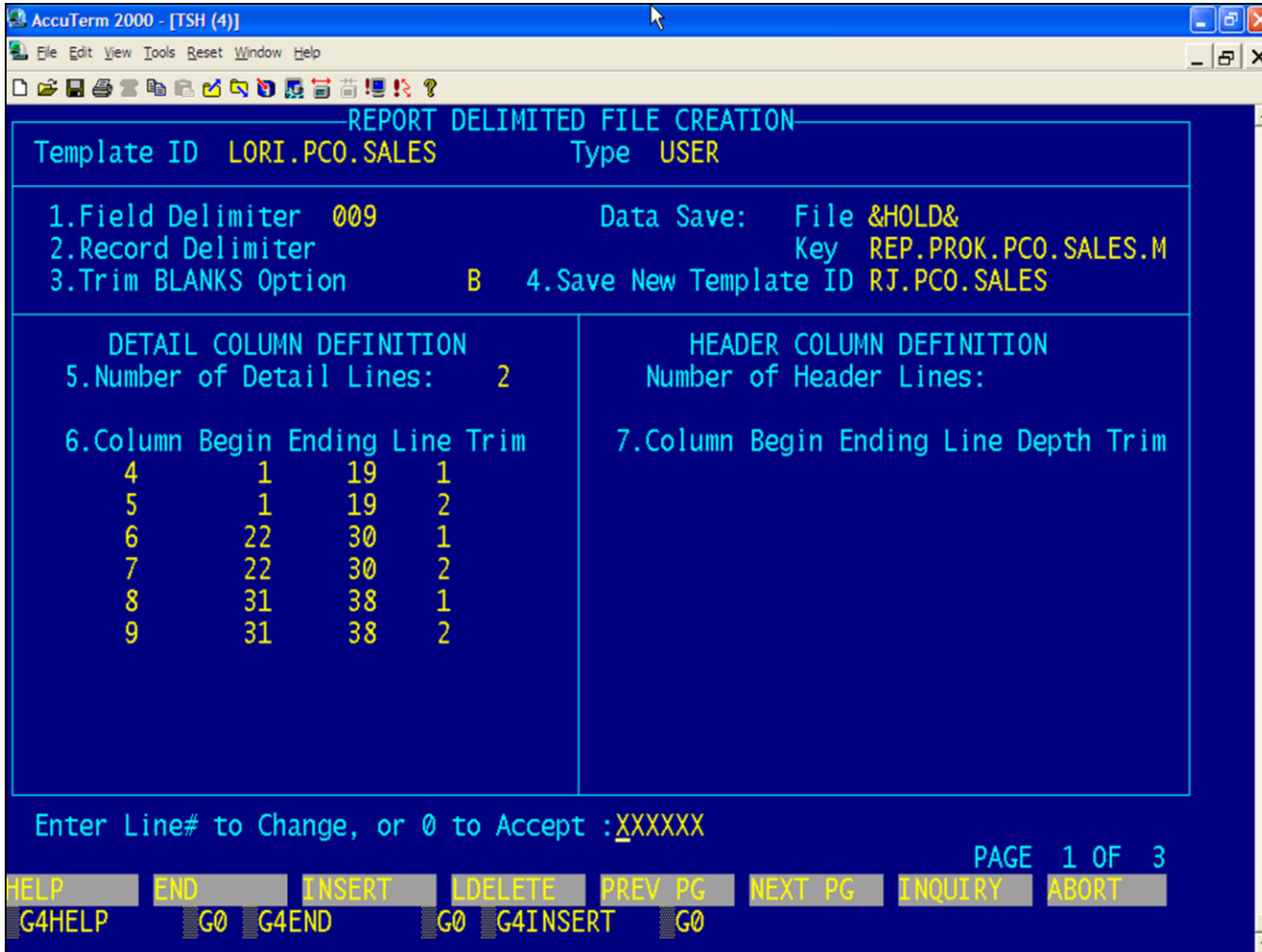
I = Include as own row

Notes:

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Report Capture Flatfile Templates Maintenance – Visual

Define – Processing – Screen 1

In this section we are defining the Processing function.

Field Delimiter - Enter field delimiter. Leave blank for fixed length flat file. Enter 3-digit ascii character (000 - 255) or type the delimiter (eg. ","). TAB is ASCII 009.

Record Delimiter - Enter the record delimiter. This is an ASCII character (000 - 255). Hit return for CRLF. CR is ASCII 010.

Trim Blanks Option - Enter the trim option: N - No trim, L - trim leading spaces, T - trim trailing spaces, B - trim both leading and trailing spaces.

Data Save File – The workfile is displayed. Key- The item id of the raw report is displayed.

Save New Template ID – Enter a template ID to be able to reuse this template. Leave blank if this is only being used one time.

Detail Column Definition – You are able to maintain any column settings that were previously defined.

Header Column Definition - You are able to maintain any column settings that were previously defined.

```
AccuTerm 2000 - [TSH (4)]
File  Edit  View  Tools  Reset  Window  Help

                  REPORT DELIMITED FILE CREATION
 Template ID  LORI.PCO.SALES          Type  USER

  1.Field Delimiter   009          Data Save:   File &HOLD&
  2.Record Delimiter                           Key  REP.PROK.PCO.SALES.M
  3.Trim BLANKS Option        B    4.Save New Template ID  RJ.PCO.SALES

     DETAIL COLUMN DEFINITION              HEADER COLUMN DEFINITION
   5.Number of Detail Lines:    2        Number of Header Lines:

   6.Column Begin Ending Line Trim       7.Column Begin Ending Line Depth Trim
      4       1     19     1
      5       1     19     2
      6      22     30     1
      7      22     30     2
      8      31     38     1
      9      31     38     2

 Enter Line# to Change, or 0 to Accept :XXXXX
                                                        PAGE  1 OF  3
HELP       END        INSERT     LDELETE    PREV PG    NEXT PG   INQUIRY   ABORT
G4HELP        G0  G4END      G0  G4INSERT     G0
```

Notes:

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Define – Processing – Screen 2

In this section we are defining the Processing function.

The Template ID and Template Type are displayed from the main screen.

Break Column Definition - You are able to maintain any column settings that were previously defined.

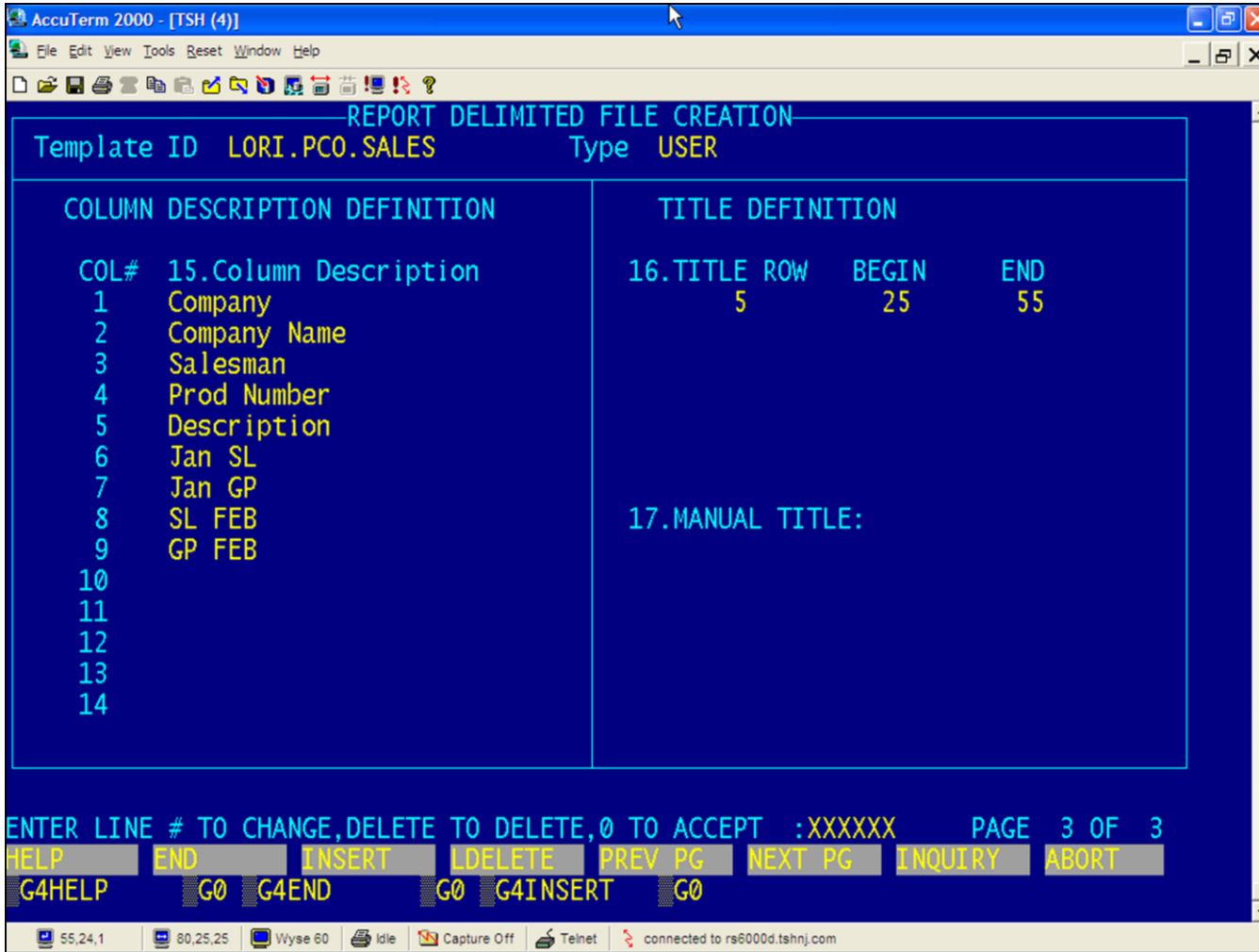Totals Column Definition – As above, you are able to maintain any column settings that were previously defined.

```
File Edit View Tools Reset Window Help                                    _ |B| X
D B H B I B B C B B B B B B I B !  ?

────────────────REPORT DELIMITED FILE CREATION────────────────
 Template ID  LORI.PCO.SALES          Type  USER

   BREAK COLUMN DEFINITION              TOTALS COLUMN DEFINITION
 #  9.Identifier Col  Lines  Process   # 12.Identifier Col  Lines  Process
 1   COMPANY:      1    1       I       1   GRAND         1    2       R
 2   SALESMAN:     1    1       I       2   TOTAL         1    1       R
 3   P/C           1    1       R       3
 4   *********     1    1       R       4

 10.Column   Begin Ending Line Trim ID  13.Column   Begin Ending Line Trim ID
     1         9    15     1     1
     2        17    70     1     1
     3        17    49     1     2

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT  :XXXXXX    PAGE  2 OF  3
HELP         END         INSERT      LDELETE   PREV PG   NEXT PG   INQUIRY   ABORT
 G4HELP      G0  G4END      G0  G4INSERT    G0

 55,24,1      80,25,25   Wyse 60   Idle   Capture Off   Telnet   connected to rs6000d.tshnj.com
```

Notes:

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Define – Processing – Screen 3

In this section we are defining the Processing function.

The Template ID and Template Type are displayed from the main screen.

Columns Definition - You are able to maintain any column settings that were previously defined.

Title Definition – As above, you are able to maintain any column settings that were previously defined.

ENTER LINE#, ABORT, '0' OR 'END' TO SEND E-MAIL:*XXXXXX*

Enter the line number to change. Enter 'ABORT' to end without saving any changes. Enter '0' to accept and process the template.

Screen contents:

```
AccuTerm 2000 - [TSH (4)]
File  Edit  View  Tools  Reset  Window  Help

┌─────────────REPORT DELIMITED FILE CREATION─────────────┐
 Template ID  LORI.PCO.SALES        Type  USER

    COLUMN DESCRIPTION DEFINITION          TITLE DEFINITION

     COL#   15.Column Description      16.TITLE ROW    BEGIN      END
      1     Company                          5          25        55
      2     Company Name
      3     Salesman
      4     Prod Number
      5     Description
      6     Jan SL
      7     Jan GP
      8     SL FEB              17.MANUAL TITLE:
      9     GP FEB
     10
     11
     12
     13
     14


ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT  :XXXXXX    PAGE  3 OF  3
HELP       END        INSERT     LDELETE    PREV PG  NEXT PG  INQUIRY  ABORT
  G4HELP      G0  G4END      G0  G4INSERT    G0

55,24,1    80,25,25   Wyse 60   Idle   Capture Off   Telnet   connected to rs6000d.tshnj.com
```

Notes:

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Report Capture Flatfile Templates Maintenance – Visual

Define – Processing – Final Result

Notice the status (bottom right hand corner) shows us that we are viewing the DELIMITED RECORD.

You may switch back and forth between the source and delimited records using the <Shift+F6> keys.

If any changes are made to the columns, you must reprocess (<Shift+F5>) to see the effects.
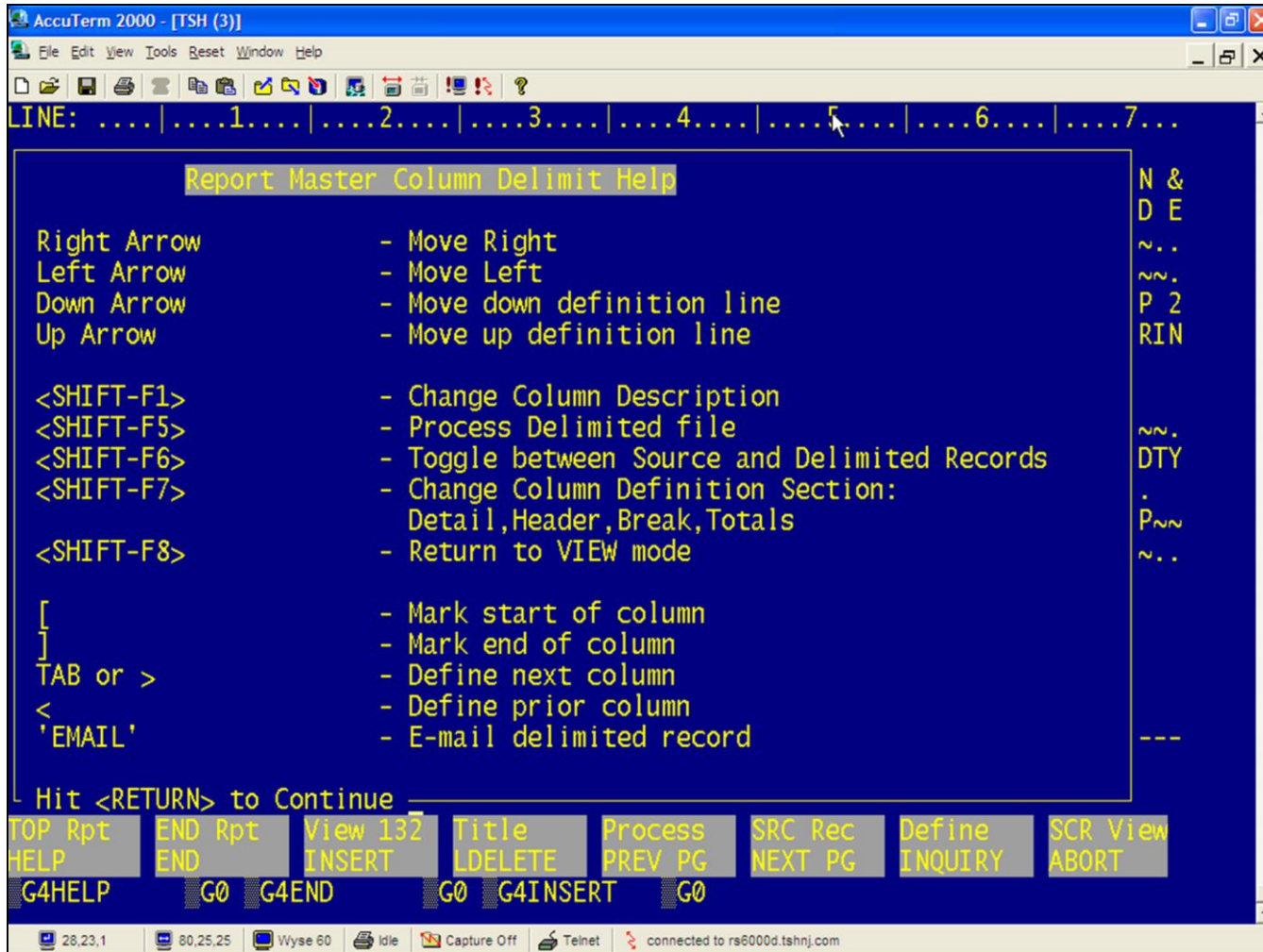
Notes:

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Report Capture Flatfile Templates Maintenance – Visual

Delimit Help Screen

Notice you can EMAIL from this point. If you have processed, you will be prompted:

SEND (F)LAT FILE OR (S)OURCE RECORD

Enter either 'F' or 'S'.

The EMAIL popup appears (see detailed steps in the Report Capture E-mail section on page 15).

Notes:

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Where to Get More Information

- Other Training Sessions
- Support Call 973-777-8050

MDS Report Capture Training
Guide

Notes:

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