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Setting Up & Using SQL Preview Reports for DDMS

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Introduction to SQL Preview Reports

The new Preview Reports function in the Report Menu combines the current capabilities of the existing sales database report screens in DDMS with the new functionality of the SQL EBS database. It is designed to allow both new and experienced users to easily view and print SQL reports. It also allows users to make minor report changes on the fly that could previously only be made in more complex report designer applications. Information is displayed in an Excel-style grid with columns that can be fully customized using sorts and limits.

The first standard group of cataloged sales reports is included with the DDMS Version 8.13 software installation. These print from their respective SQL tables. For example, the sales reports print from the current SQL SalesOrderJournal table and related supplemental files. The report definition files are saved as an XML document and placed in the ddms/reporting/eci2 folder during software installation.

Custom reports can be created and saved using third party software, Component One (C1) Report Designer. If you create additional reports, you save them in the ddms/reporting/custom folder. The Preview Reports function lets you catalog and provide security for your reports. See the *Advanced SQL Reporting* handout for more information on creating custom SQL Reports.

Before You Begin

Before you can begin using the Preview Reports function, you must:

- Install the latest version of DDMS software (8.13 or later).
- Share the DDMS/Reporting folder on the server with read permissions so client machines can access the reports. See the **Setting Up a Shared Folder on the Server** heading.
- Before using any EBS program for the first time, you must import your existing data to the new SQL database. For more information, see *Using the EBS SQL Import Panel* handout on our website at www.ddms.com. Due to changes in the software in version 8.16, you must import your SQL data. If you previously installed version 8.16, you do not need to import your data again.
- Familiarize yourself with report structure. See the **Understanding Report Structure** heading.

Setting Up a Shared Folder on the Server

1. Locate the DDMS/Reporting folder using Windows Explorer.
2. Right-click on the folder and select Properties.

3 Go to the Sharing tab and select Share this Folder.

4 Share the folder with users to grant read/write permissions.

Understanding Report Structure

To make the most of the new Preview Reports application, you need to familiarize yourself with a few new terms and some general information about reports. Basic reports have two parts: a heading and a detail section. The heading appears at the top of every page and includes general information such as report title, date, and page number. The detail section includes the actual data in the report.

In more complex reports, you might break the detail information into groups. For example, on a sales report, you might divide the sales data into groups for each salesperson. You could go a step further and divide each salesperson's sales by customer account number. In reports that are divided into groups, it is common to have a separate group header. The group header is a description or field of data that prints above a group and describes the group of report data that follows.

A report that breaks the data into groups might also have footer sections. A footer prints after each group of data.

Once you understand how the data is organized on a report, you can use the Preview Reports function to make changes to the way the data on some reports is grouped. If a report already has defined groups, you can select new grouping fields from a pre-defined list and change the way that the data is grouped on the final report. As part of that change, you can also change the data in the group header or footer sections to reflect the new grouping. However, keep in mind that you can only change grouping of data on reports that already have some grouping defined in the format.

Using the Preview Reports Function

The Preview Reports Function allows you to:

- Execute a Report
- Design a Report
- Set up Reports
- Set up User Groups.

The Design a Report function opens the C1 Report Designer. You must be authorized to use the Designer to create custom reports.

The Set Up a Report and Set Up User Groups functions can be password protected, but do not require authorization.

To access Preview Reports:

1 In the DDMS Master Menu, click 

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2 Click 

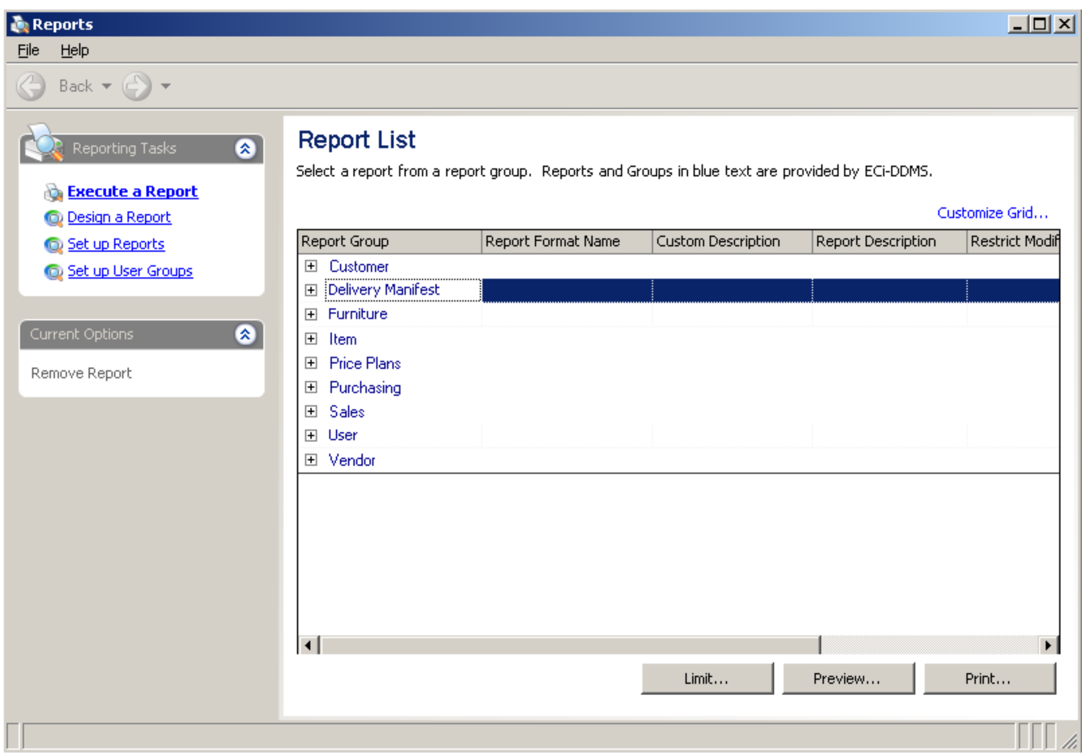
. The Reports window opens. You can execute a report, design a report, set up reports, or set up user groups. For more information see the appropriate heading.

Executing a Report

The Execute Report function does not require authorization or a password. Administrators can set up reports and users using the Set Up Report and Set Up User Groups functions. Once you do so, access to the reports in the Execute Report section is limited to the assigned users. If you do not set up users, everyone has access to all reports in this window.

You execute reports from the Report List. See Figure 1.

Figure 1: Execute Reports Report List



1 In the Reporting Tasks menu, click Execute a Report.

2 The Report List opens. You can limit, preview, or print the report. In the Report List, the standard DDMS reports and groups are shown in blue. These cannot be deleted. If you modify and save changes to these reports or add new reports, they display in black. The original reports are not deleted.

3 To select a report, click on the + (plus sign) in front of the group name in the Report Group column.

4 Click on the report name in the Report Format Name column.

Note: The Custom Description column displays a description of any custom reports that have been created in the Preview Reports application.

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5 Once you select a report, you can limit the report, sort and group the report, or set other options. You can also preview or print the report without making any changes.

Limiting the Report

In this window, you can add additional limits or sorts for the current report or modify the report groupings.

1 Once you select a report, click the Limit button.

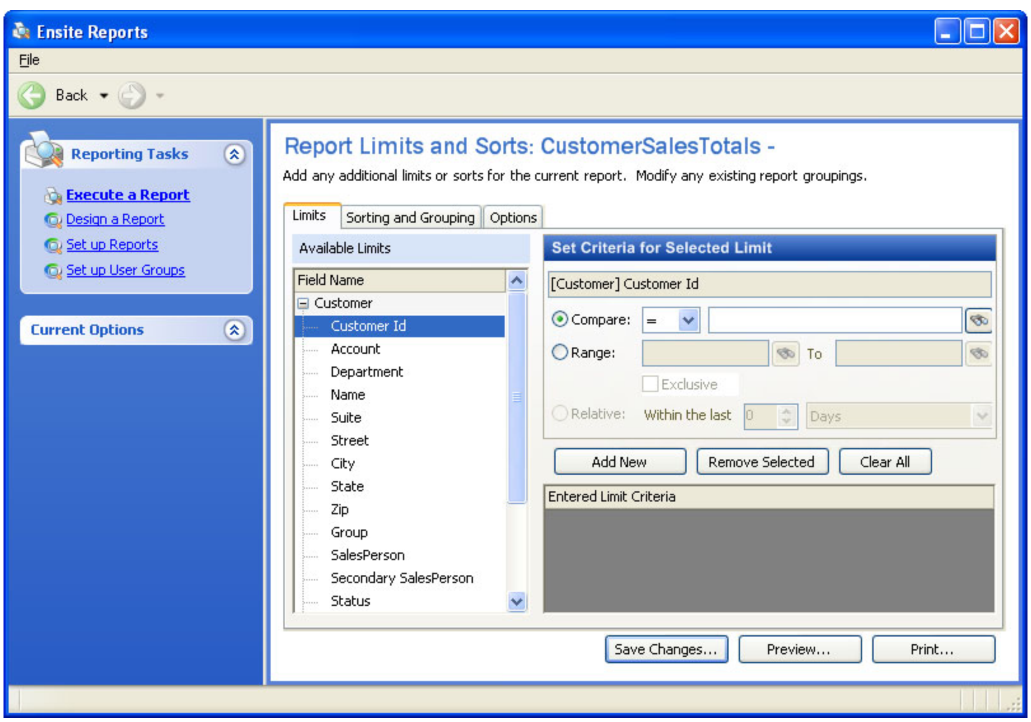

Figure 2: Limits Tab in the Limts and Sorts Window

2 The Report Limits and Sorts window opens. You can select Limits, Sorting and Grouping, and Options.

Setting Limits

When you select Limits, the fields by which you can limit are listed in the Field Name box. See Figure 2.

Note: These fields are predefined for each report and cannot be changed by the user.

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1 Use the scroll bar to locate the field name to use. Click the field name to select it.

2 Set the Criteria for the selected limit. For example, to limit by Customer ID use the buttons to select Compare, Range, or Relative.

- Use the Compare boxes to specify whether to limit by numbers that are greater than, less than, or equal to the numbers entered in these boxes. For example, if you limit by account, you would click Compare, then specify whether to limit by sales greater than, less than, or equal to by using the drop down arrow. Then, enter the number in the last box. Use the following table to determine which symbol to use:

=	Equal to
<>	Not Equal
>	Greater than
>=	Greater than or Equal
<	Less than
<=	Less than or Equal
Like	Contains given characters (ex. Search for “smi” would return Smith, Smithfield, etc.)

Then, enter a value in the corresponding box or click to browse.

- Use the Range/To boxes to enter a range of numbers, such as vendor or item numbers. Enter the first number in the range in the Range box and the ending number in the To box. Click to browse.

- The Exclusive check box works with the Range/To boxes. After entering a range, click Exclusive to limit by numbers outside of the range you set.

- Use the Relative boxes to limit by relative dates. Click Relative. Then, use the arrows in the Within the Last box to select the number and in the corresponding drop down box, the unit of measure (days, weeks, and so on).

3 When you have selected the limit to use, click Add New.

4 To select additional criteria, repeat **Steps 2-3**.

Note: You can limit to two or more sets of data for each field name. To do so, add the field name a second time with a new criteria. For example, to limit to account number 1234 or 4321, first set the account number in the compare box to 1234 and add that limit. Second, add 4321 as a limit. The data must meet any one of the limits for that field (either 1234 or 4321 in this case), but not all.

5 To remove, click the limit to remove in the Entered Limit Criteria box and click Remove Selected. Click Clear All to remove all limits.

Changing Sorting and Grouping

In the Sorting and Grouping tab, you can change how the report is sorted and grouped. See Figure 3. Groups appear in the Defined Groups box if the original report format had defined groupings. If the original report did not have defined groupings, sorting and grouping options are disabled. The order in which the groups appear is the order they print on the report.

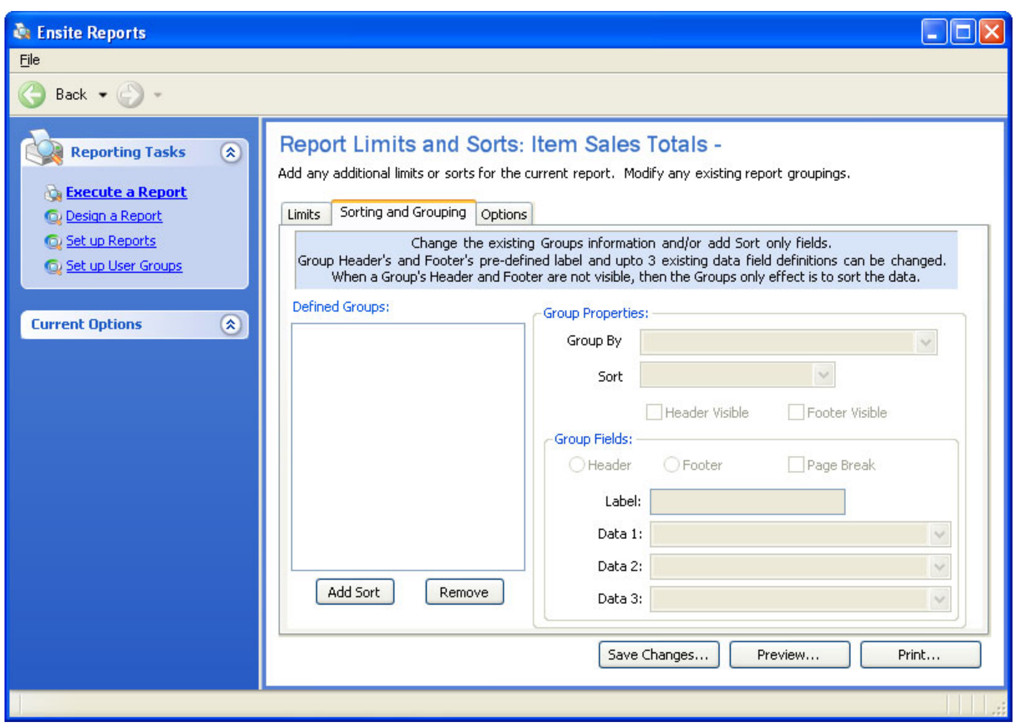


Figure 3: Sorting and Grouping Tab in the Limits and Sorts Window

Headers and Footers are per group not per page.

To edit an existing sort/group:

1 Click the group to change in the Defined Groups box. The report is sorted in the order these groups appear. To change the first sort, select the first group in the list. To change the second way the report is sorted, select the second sort, and so on. You can set Group Properties and Group Fields for each sort.

2 Set Group Properties.

2.1 Once the group to change is selected, use the drop down arrow in the Group By box to select the field name for the new sort. The new sort name appears in the Defined Groups box.

2.2 In the Sort box, use the down arrow to select how to sort: NoSort, Ascending, or Descending.

2.3 Click Header Visible and/or Footer Visible to make these fields visible on the report. The header and footer defined in this section are group headers and footers that print at the beginning and end of each group.

3 In the Group Fields section, set what is displayed in the header/footer. These fields are only available if Header Visible or Footer Visible are checked in the Group Properties section.

3.1 Click Header or Footer to indicate where to display the label.

3.2 Click the Page Break check box to include a page break after each group. Leave this check box blank to print with no page break between groups.

3.3 In the Label box enter a label for the group to print on the report. For example, if you are sorting by customer name, you might type Customer Name.

3.4 In the Data 1, Data 2, and Data 3 boxes select the data fields to print on the header/footer lines.

4 To edit additional sorts/groups, repeat **Steps 2-3**, selecting a different sort to edit in the Defined Groups box each time.

5 When finished, click Save Changes to save the changes as a New Report for later use. If you are running a one-time report, you can preview or print without saving changes.

6 The Save Changes as New Report box opens. Enter the description for the report and click OK.

To add a new sort/group:

1 Click Add Sort. Sort 1 appears in the Defined Groups box. You can set Group Properties and Group Fields. See **Steps 2-3** under editing an existing sort/group for additional details.

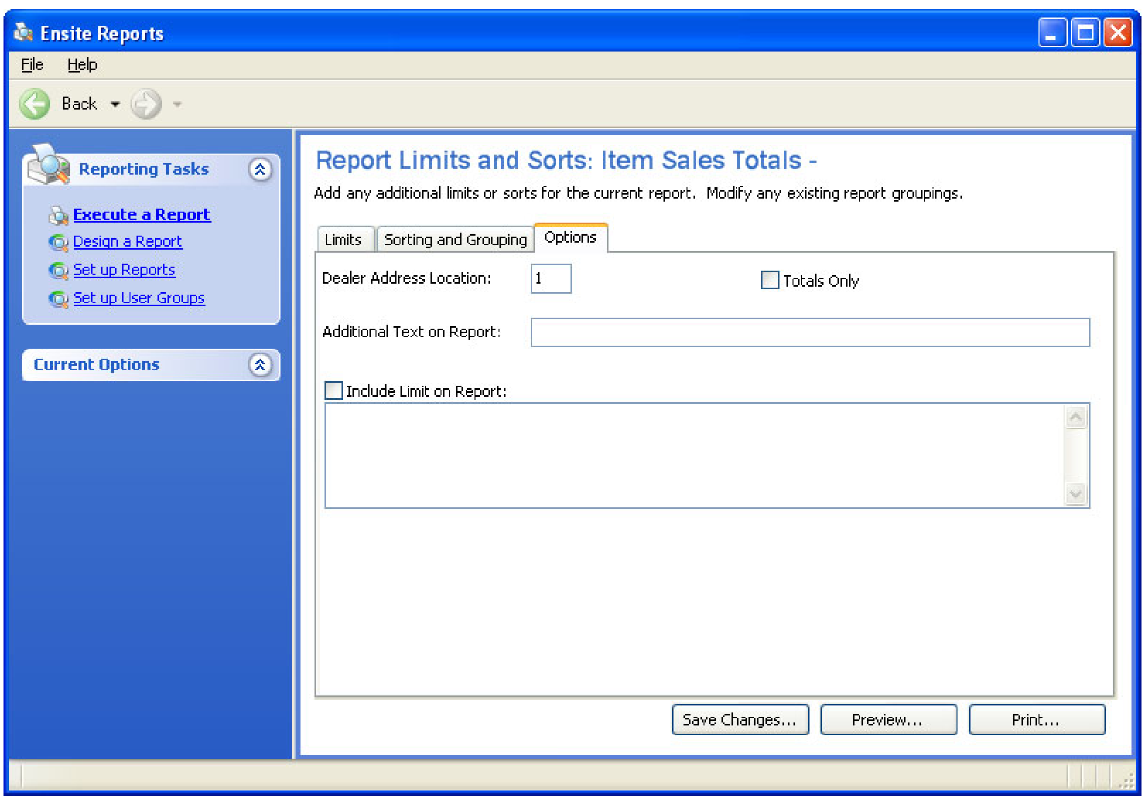
2 To add an additional sort, click Add Sort again and set Group Properties and Group Fields. Remember, the order that the sorts appear in this list is the order that the sorts are applied.

3 When finished, click Save Changes to save the changes as a New Report for later use. If you are running a one-time report, you can preview or print without saving changes.

4 The Save Changes as New Report box opens. Enter the description for the report and click OK.

Note: When a user changes a report, only this user has initial access to the new report. System administrators can make this report available to other users. See the heading **Setting Up a Report**. Reports changed and saved through this application appear in the Report List in black text. Standard reports appear in blue text.

Figure 4: Options Tab in the Limits and Sorts Window

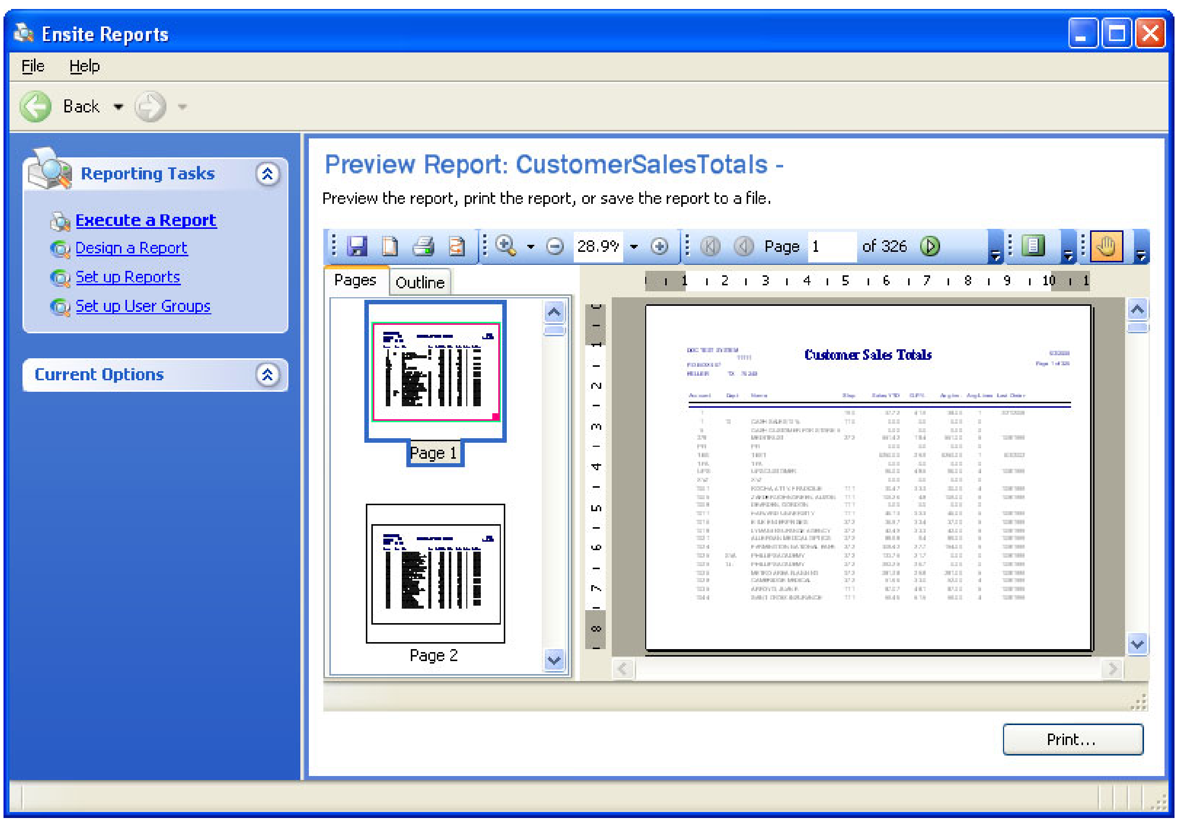


Viewing Options

In the Options tab, you can select additional information to print on the report. See Figure 4.

- In the Dealer Address Location box, enter the dealer location for which you ran the report.
- Click the Totals Only box to print only header/footer lines. You can use this feature to preview or print just the data totals that appear on the header and footer lines and omit all of the detail records.
- The Additional Text on Report box allows you to enter up to 60 characters of additional text to print on the report.
- Click the Include Limit on Report checkbox to print the limits from the Limits tab. You can manually change the information that prints in the box below.
- You can also select Save Changes, Preview, or Print from this menu.

Figure 5: The Preview Report Window



Previewing the Report

In the Preview Report window, you can preview the report, print the report, or save the report to a file. See Figure 5.

Every time the client clicks print or preview, the system queries data on the server and brings back all the data to the client and formats it on the client machine.

- Set up your page just like you would in any other program, such as portrait or landscape
- Change the view from Single Page, Continuous, Pages Facing, and Pages Facing Continuous
- Use the Find function to search for text
- Move through the pages using the arrow keys or the scroll bar
- Zoom in to view the report more clearly and use the hand icon to move the zoomed picture to a particular location on the report
- Print reports or export to a file.

1. Click Preview Reports.
2. In the Print Preview window, you can print or save to a file.

   To export to a file, click . You can save the file as a pdf, htm, rtf, xls, or emf.

   To print, click .

   Once you save a report to one of these formats, you can manipulate data and print as needed from other applications such as Excel.

Printing the Report

If you select print, you can print to any local printer or any printer you have access to on your network. Select print by clicking or Print.

Designing a Report

Click Design a Report. The Component 1 Report Designer opens if you are authorized. The Component 1 Designer is an advanced SQL reporting tool included in your software at no charge as a tool for those who are experienced with SQL database reporting. At this time ECi does not offer training or support for the Component 1 Report Designer. See the *Advanced SQL Reporting Guide* document online for more information.

Setting Up a Report

The Setting Up a Report function allows administrators to organize and set security for all of your reports. This function is password-protected. The password is set in the Reporting Parameters accessible through the Keyop Menu.

Reports are now organized and displayed by groups. New report groups can be created or deleted. Custom reports can be added to or removed from new or existing report groups.

Report security can be controlled by user. Users can be assigned to specific reports individually or in user groups. Users who are not assigned to a report do not see that report in the list of available reports. Reports that do not have any assigned users or user groups are viewable to all users.

In this window, you can right click a report or use the Current Options list on the left side to select options.

- To add a report group, click Add Group. The Report Group Name dialog box opens. Enter the name for the report group and click OK.
- To remove a report group, click Remove Group. At the Remove Report Group prompt, click OK. You cannot remove system-created standard report groups.
- To add a custom report, click on a report group, then click Add Report.

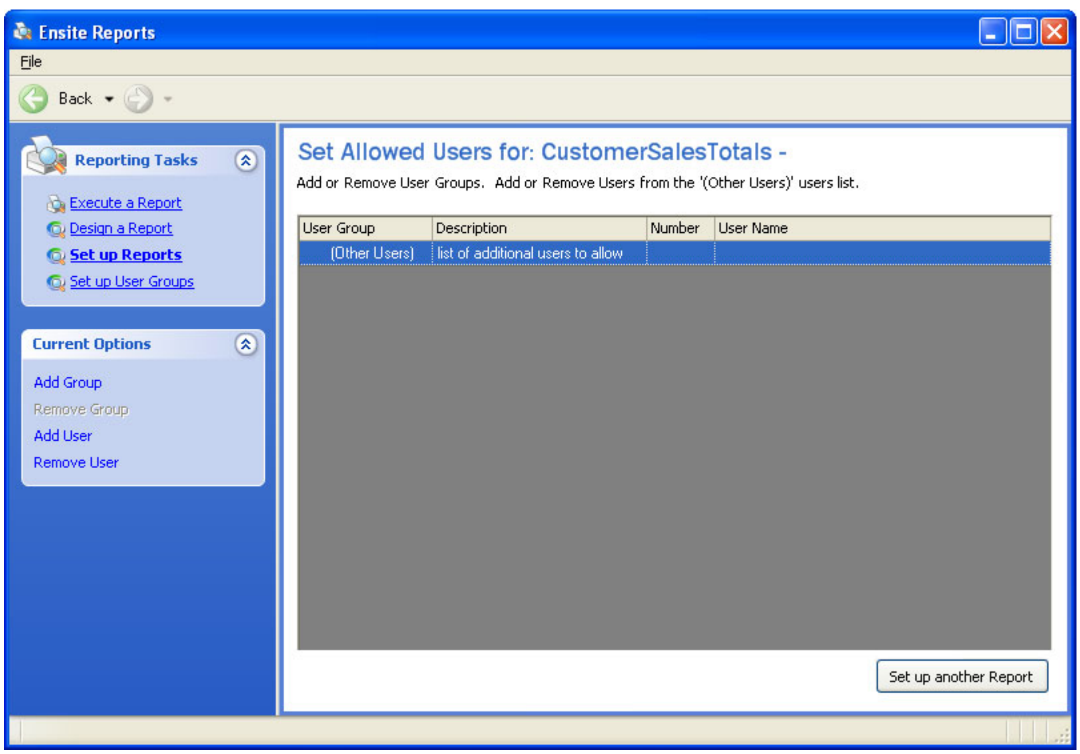


Figure 6: The Set Allowed Users For Window

The Select Desired Component 1 Report Definition File dialog box opens. Navigate to the proper location and select the XML report definition file and click Open. Then, choose the report to add and click Continue. For more information on Custom Reports, see the *Advanced SQL Reporting Guide*.

- To Remove a Report, click Remove Report. At the Remove Report prompt, click OK.

Note: If you create a custom report and are still the sole user, you can delete a report as an end-user. Otherwise, only administrators have access to this feature.

- To set allowed users, select a report in the Report Format Name column and click Set Allowed Users.

Setting Allowed Users

The Set Allowed Users For window opens. See Figure 6.

You can perform the following functions:

- To add a user group, click Add Group. The Select User Group Security dialog box opens. Select a group and click OK.

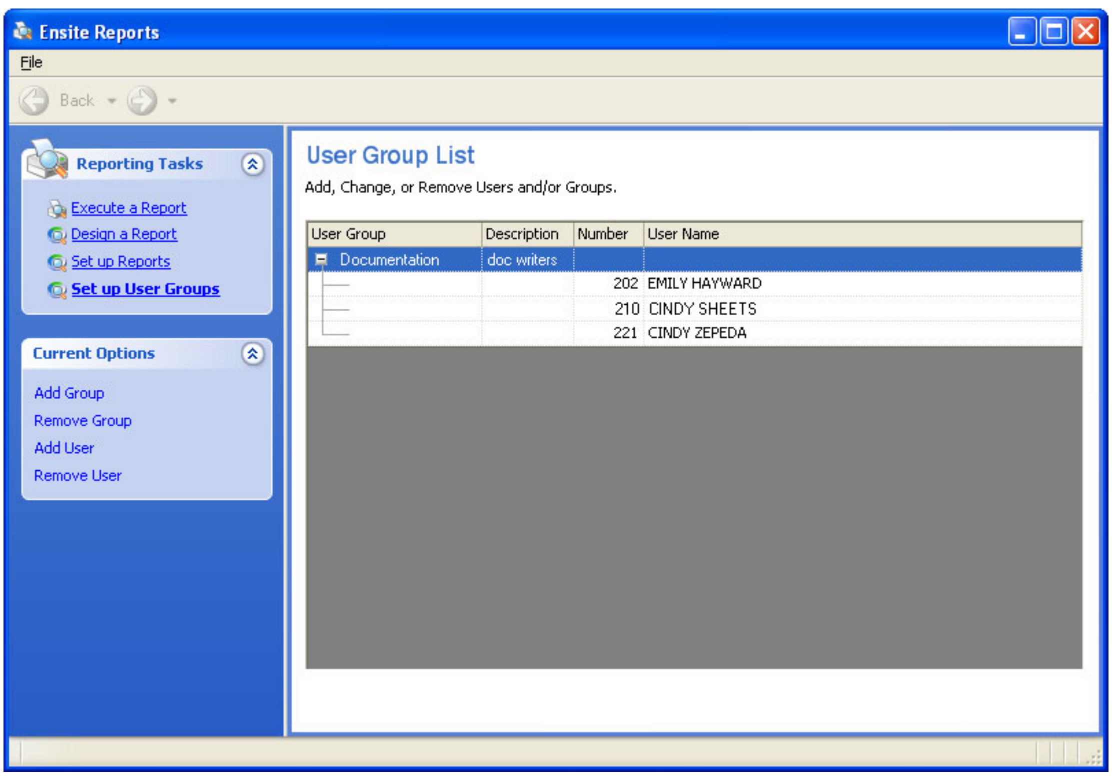


Figure 7: The User Group List

- To remove a user group, click Remove Group. At the Remove User Group prompt, click OK.
- To add a user, click Add User. The Select Users dialog box opens. Select a user and click OK.
- To remove a user, click Remove User. The User Remove dialog box opens. Click OK.

Setting Up User Groups

In the User Group List, you can create user groups and assign users to those groups. Click Set Up User Groups. The User Group List opens. See Figure 7. You can perform the following functions:

- To add a user group, click Add Group. The Set User Group dialog box opens. Enter the Name and Description in the boxes and click OK.
- To remove a user group, select the group and click Remove Group. The User Group Remove dialog box opens. Click OK.
- To add a user, click Add User. The Select Users dialog box opens. Select the user and click OK.

Note: The list of users displayed in the Select Users dialog box includes all the users you currently have set up in your DDMS system.

- To remove a user from a group, click Remove User. In the User Remove box, click OK.