



Eclipse Report Writer - Mass Load

Release 8.6.4 (Eterm)

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Activant® Eclipse™ 8.6.4 (Eterm) Online Help System

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Report Writer/Mass Load Overview

Report Writer/Mass Load is a program that performs two functions:

- To extract information from the database and create custom reports.
- To update one or more fields of information for a large group of records in a file.

Report Writer

Use Report Writer to extract information from the database and create custom reports.

A report is a file of information that you can print directly from the system or download to your PC, where another application can use the data. The Report Writer program can calculate subtotals and totals, perform mathematical calculations, and print mailing or bin labels.

You can save a report layout and selection criteria and then run the report at another time or set up the Phantom Scheduler to run the report on a regular basis.

Mass Load

Use Mass Load to update one or more fields of information for a large group of records in a file. You can enter data, such as credit data for customers or inventory control parameters for products, and then save the mass load screen layout and selection criteria to use at another time. Updating records in the database can be time-consuming and tedious. If you need to set the same parameter for many records, use Mass Load to update these records with one program run.

For example, you can select a set of products and apply a lost sale parameter. Instead of creating a report with the list of products and then updating each product one at a time, you can use Mass Load to select the products and apply the parameter.

Report Writer/Mass Load Design

The report writer and mass load functions share features of one program. Each function uses a different view of the Report Writer/Mass Load Design screen. Both functions access fields of data in system files. Report Writer uses the selected information for reporting purposes. Mass Load updates the selected fields of information.

If you create a report that identifies selection parameters, you can switch views and use those same parameters in the Mass Load program to update the files.

We recommend that you have a good understanding of the Eclipse Dictionary before using the Report Writer / Mass Load programs. For more information, see Eclipse Dictionary Overview. We also recommend that you attend the UniVerse Data Structures and Report Writer/Mass Load classes before creating your own reports or mass loads.

Files Commonly Used in Reports

The most common files used when creating reports are listed below. The table that follows gives details about these files and some other commonly used files.

Most Commonly Used Files

The following files are most commonly used when creating reports:

- ENTITY
- PRODUCT
- AR (Accrual Register)
- PSUB (Product Subsidiary)
- MATRIX
- ORDER.QUEUE
- PRINT.QUEUE

Commonly Used Files with Descriptions

The following table lists some files that are commonly used when creating reports and gives detailed information about each one.

File	Description
ENTITY	<p>Name and address for customer bill-to's, customer ship-to's, vendor pay-to's, vendor ship-from's, and branches.</p> <p>Note: Branch-specific data for this file is contained in the ENTITY.BR file. Link to these branch-specific data elements via the ENTITY file itself.</p>
PRODUCT	<p>Product descriptions, groupings for products, and pricing information. PROD.PRICE and PROD.DYNAM support this file.</p> <p>Note: Branch-specific data for this file is contained in the PROD.BR file. Link to these branch-specific data elements via the PRODUCT file itself. Calculated information, such as average cost and forecast period, is stored in the PROD.LOG file.</p>
AR	<p>Accrual Register. Summary information (header and totals, along with associated dates) for <i>closed</i> ledger transactions, such as sales invoices, received purchase orders, cash receipts postings, accounts payable invoices, and completed branch transfers. The ID to the file is the Ledger#.Invoice#. Example: S1012302.002.</p> <p>After transactions process, the summary information moves from the ORDER.QUEUE file to the AR file. Transaction details move to the PSUB file.</p>

File	Description
PSUB	Line item detail for <i>closed</i> ledger transactions, such as sales invoices, received purchase orders, transfers, and inventory adjustments. Each product on a transaction creates 1 record in this file. For example, a sales invoice with 5 products creates 5 PSUB records. After transactions process, the detailed product information pertaining to the sales order moves from the ORDER.QUEUE file to the PSUB file.
PROD.DYNAM	Product on-hands, bin locations, average and last cost, and open orders for the product in each branch. Links to the PRODUCT file.
PRINT.REVIEW	Transactions in the Open Order Status Review Queue.
BUY.LINE	Purchasing-related information entered in Buy Line Maintenance, such as buyer, target factor, target value, order cycle days, etc. The ID to the file is the Buy Line ID. Products link to this file when a buy line is assigned to the product. Note: Branch-specific data for this file is contained in the BUY.LINE.BR file. Link to these branch-specific data elements via the BUY.LINE file itself.
CONTACT	Information entered in Contact Maintenance.
COUNT.QUEUE	List of products to be counted for each branch. Products that have a negative on-hand, have been over-committed, or for which there was a manual backorder on a shipped ticket go into this queue.
EDICT	All Eclipse dictionary items for all files. The ID for records in the file is the Filename~DictionaryName. Example: PRODUCT~DESC.
ENTITY.PN.IDS	Customer/vendor-specific part numbers. This file is populated only when customers or vendors are assigned a part number.
FAX.LOG	Activity information about faxes that are sent out using the Eclipse system.
GENLED	G/L account and G/L report template records. This file does not contain G/L balances. The GENLED file has three indexes, which you can use to select one type of record or the other: &INDEX& for G/L accounts only, &INDEX&.GRP for template groups only, and &INDEX&.ALL for all records.
GL.BUDGET	Information entered in G/L Budget Maintenance.
INITIALS	Information entered in User Maintenance, such as user name, title, menu, message tune, keywords, etc.
LEDGER	All sales orders, cash receipts records, purchase orders, journal entries, accounts payable invoices, and branch transfers. This file contains both summary and detail line item information. The ID to the file is the sales order #, purchase order #, etc. This file is rarely used in Report Writer. Use the PSUB file to retrieve detailed information pertaining to shipped tickets. Use the following ledger-index files in Report Writer: AR, ORDER.QUEUE, PRINT.QUEUE, and PSUB.
LEDGER.LOG	All change logs associated with transactions.

File	Description
MATRIX	All price matrix cells for the Sell Matrix and the Buy Matrix. It includes matrix cells for customer classes, as well as customer-specific prices. The ID to the file is BRANCH~Customer# or Class~Group or Product#~Effective Date. Examples: ~C2~GWIRE~10354 or 14993~1684~10354 Use this file to create a report that provides a list of matrix cells that are about to expire.
MAINT.LOG	Audit change log information for any file for which maintenance logging is enabled.
MENUS	All menus created in Eclipse.
MESSAGES	All messages sent and received, until the individual user deletes them.
MISC.DATA	Items from various sources, including commission plans, product families, manifest information, quote maintenance, user's last run report, and customer-created product groups from Web Commerce. The ID is the Type Identifier~ID. Example: COMM~INSSLS.
ORDER.QUEUE	Open ledger transactions, such as open (not printed) sales orders, purchase orders, and transfers. The ID to the file is the Ledger.ShipDate.GID. Example: S1012300.10865.1 (GID = Generation ID) After the order is processed the summary information moves to the AR file and the detailed product information moves to the PSUB file.
OVERRIDES.LOG	Manual overrides to sell and cost values on purchase orders, sales orders, or transfers, if the Log Sell Price, Purchase Price and Cost Overrides control maintenance record is set to Y . This file is used for reporting purposes only.
PRICE-GRP	Information entered in Buy/Sell Group Maintenance.
PRICE.LINE	Data related to setting up price lines in Price Line Maintenance, including default units of measure, basis filed names, and basis assignments. Products link to this file when a price line is assigned to the product. Note: Branch-specific data for this file is contained in the PRICE.LINE.BR file. Link to these branch-specific data elements via the PRICE.LINE file itself.
PRINT.QUEUE	Ledger transactions that are <i>queued</i> to print. The Print Status prompt on the Status screen in SOE, POE, and TOE updates this file. A/P invoices (checks) are also in this file. The ID to this file is the Ledger#.GID. Example: S10112300.1 (GID = Generation ID)
PROCURE.GROUP	Information entered in Procure Group Maintenance. Products link to this file using the procure group entered on the product record or its buy line record. Note: Branch-specific data for this file is contained in the PROCURE.GROUP.BR file. Link to these branch-specific data elements via the PROCURE.GROUP file itself.
PROD.LIFO	All product LIFO information, which updates each time the LIFO update routine runs.
PROD.PRICE	Price and cost information found in Product Price Sheet Maintenance, such as list price and replacement cost, for each product. The product's internal ID is part of the key to this file.

File	Description
PRODUCT.NOTES	Product notes entered in Product Maintenance. This file has the same key as the product file, so they link to one another.
QUAL.LOG	Information generated by Unquality Event Tracking entries.
RECURRING.JE	Setup information for recurring journal entries.
REMINDER	Reminder notes created from Customer Maintenance, Vendor Maintenance, or the System Files menu.
REPORTS	List of reports generated within Eclipse and sent to the Hold file. Includes the date and time stamp for the purging routine. The &HOLD& file stores the detailed information regarding the reports.
SYSTEM.QUEUE	All scheduled phantom processes. This file is dynamic in that the key to each record changes each time the phantom processes an activity listed in Phantom Status.
TAX.CODES	Information related to tax jurisdictions, such as tax rates and G/L posting information.
TERMS	Customer and vendor-related terms entered in Terms Maintenance. It includes information on discount percents, discount days, due dates, service charge percents, and service charge due dates. Customer records, vendor records, and sales transactions link to the Terms file.
TERRITORY	Information entered in Territory Maintenance.
TRACKING.LOG	Call tracking information for all entities and users in the system. The key to this file is the Tracking ID number generated each time a tracker is created.
UD.WARRANTY	Warranty information entered on a user-defined screen when creating returns for you customers. This is a user-defined file, which contains limited information. You can enhance this file, based on how you handle warranties.
WHSE.OP.QUEUE	In-process RF transactions, until they are closed out.
WORK.MISC	Data from different sources, including saved report writer layouts, saved mass load layouts, print price sheets, manifest information, product ranking data, e-mail standard forms, order entry clipboard (Ctrl-F5), detailed daily schedules, physical generations, cycle count generations (RDC), and F10 Quick Access information.
ZIP	Zip code information entered in Zip Code Maintenance. Each Eclipse system contains all US 5-digit postal codes, including city and state information. This file also contains the tax jurisdiction codes.

Dictionary Items Commonly Used in Reports

The dictionary items included in this topic are commonly used when creating reports.

Common ENTITY File Dictionary Items

The following ENTITY file dictionary items are commonly used when creating reports.

Attribute #	Dictionary ID	Notes
1	NAME	
2	ADDRESS	Multi-valued
3	CITY	
4	STATE	
5	ZIP_CODE	
8	SORT_BY	
9	INDEX	Multi-valued
13	CLASS	Branch-specific
14	SHIP_TOS	
16	CONTACTS	Multi-valued
17	PHONE_NBRS	Multi-valued
22	CREDIT_LIMIT	
28	CUST_TERMS	
34	TAX_EXP_NBR	Multi-valued
35	PRICING_TYPE	
36	TAX_JUR_OVERRIDE	
41	OUTSIDE_SALES	
42	PRICE_STYLE	
43	BACK_ORDER_STATUS	
45	PO_NUM_REQ	
46	SHIP_VIA	
47	PAYMENT_DAYS	
48	START_DATE	
50	INVOICE_PRINT_COPIES	
51	INVOICE_SELECT_CODE	
53	HOME_BR	
58	VENDOR_TERMS	
60	OVER_SHORT_PERCENT	

Attribute #	Dictionary ID	Notes
61	OVER_SHORT_DOLLAR	
62	VENDOR_BACK_ORDER	
77	SIC_CODE	
78	CUSTOMER_SELECT_CODE	
81	RANK	
102	1099_TAX_ID	

Common PRODUCT File Dictionary Items

The following PRODUCT file dictionary items are commonly used when creating reports.

Attribute #	Dictionary ID	Notes
1	DESC	Multi-valued
2	GL_PRODUCT_TYPE	
3	STATUS	
4	KEYWORDS	Multi-valued
9	PRICE_LINE	
10	UNIT_WEIGHT	
12	BUY_LINE	
14	COMMODITY_CODE	
19	SELECT_GROUP	
35	PER_QTY	Branch-specific
63	PU_IDS	

Common AR File Dictionary Items

The following AR file dictionary items are commonly used when creating reports.

Attribute #	Dictionary ID	Notes
1	PO_NBR	
1	INV_NBR	
8	BALANCE_DUE	
10	BILL_TO_CUST_ID	Entity ID
11	DISCOUNT_DATE	
12	DUE_DATE	
13	SHIP_DATE	
15	SHIP_TO_CUST_ID	

Common PSUB File Dictionary Items

The following PSUB file dictionary items are commonly used when creating reports.

Attribute #	Dictionary ID	Notes
0	PSUB_ID	PSUB File ID = Product ID ~ GL Branch ~ GL Date ~ Ledger ID # ~ Generation # ~ Line Item # ~ Location Type ~ Bin Location or Direct Vendor ID ~ Kit Component ID ~ Shipping Branch, if different from GL Branch
1	QTY	Positive
4	DOLLAR_ENTITY_ID	
5	PRODUCT_ENTITY_ID	

Common MATRIX File Dictionary Items

The following MATRIX file dictionary items are commonly used when creating reports.

Attribute #	Dictionary ID
1	MATRIX_TYPE
3	PRICE_DATE_OVRD
4	BEST_PRICE
7	QTY_BREAK_BASIS
8	QTY_BREAK_FORMULA
12	COST_BASIS
13	COST_FORMULA
21	REBATE_DATA

Common ORDER.QUEUE File Dictionary Items

The following ORDER.QUEUE file dictionary items are commonly used when creating reports.

Attribute #	Dictionary ID	Notes
1	ORDER_STATUS	B, O, C, A, L, etc.
2	PRICE_BR	
3	PRODUCT_BR	

Attribute #	Dictionary ID	Notes
7	DOLLAR_ENTITY_ID	
8	PRODUCT_ENTITY_ID	
9	WRITER	
11	SALESPERSON_OUT	

Common PRINT.QUEUE File Dictionary Items

The following PRINT.QUEUE file dictionary items are commonly used when creating reports.

Attribute #	Dictionary ID	Notes
1	STATUS	I = Invoice
2	BR	Price Branch
3	STK.BR	Ship Branch
4	SHIPDATE	Invoice Date
5	PRT.STATUS	Q, P, B
6	BT.ENTITY	
7	ST.ENTITY	

Report Writer Overview

Use Report Writer to extract information from the database and create custom reports. You can assemble data on customers, products, or accounts in any combination you need.

Creating a report requires the following four major tasks:

- **Designing the Report Layout** – A report layout includes the title, columns, headings, and totals. It also identifies the file and fields from which to obtain the report data. If you assign an ID and save the report design, you can recall and run the report any time without redesigning it.
- **Entering Column Data** – A dictionary item used in a column of the layout may require additional data in order to produce accurate information on the report. For example, if a dictionary item is multi-valued, you need to indicate the value to use for the report.
- **Selecting Records for the Report** – You need to specify the criteria for selecting the records to include in the report.
- **Processing the Report** – After selecting the records for the report, you need to process the data and create the report.

For step-by-step instructions, see [Creating Reports](#).

Creating Reports

Use Report Writer to select information from the database for reporting purposes. You can gather data on customers, products, or accounts in any combination you need.

► **To create a report:**

1. From the **Reprts** menu, select **Report Writer** to display the Report Writer view of the Report Writer/Mass Load Design screen.
2. Design the report layout.
3. When a dictionary item in a column of the layout requires additional data in order to produce accurate information on the report, use the **Column Data** hot key to enter the required column data.
4. Use the **Sel Build** or **Adv Selection** hot key to select and sort the records to include in the report.

Note: You can perform steps 3 and 4 before or after starting the report driver in step 5. If you do this before starting the report driver, you can save the data and selection criteria as defaults stored with the report design.

5. Use the **Run Report** hot key to run the report driver.

The Report Driver screen displays the prompts and default data entered for the required column and selection data.

6. Edit or enter any missing column data or selection data by doing one of the following:
 - Enter any missing data on this screen. This method applies the data only to the current report.
 - Use the **Column Data** and **Selection Data** hot keys to enter the missing data. This method commits the changes as defaults for the report layout.
7. Set options, if needed, and generate the report.

Designing Report Layouts

Use the report writer view of the Report Writer/Mass Load Design screen to design a report layout. In the header portion of the screen you must assign an ID to the design, designate the file from which the data for the report will be obtained, and enter the title to be printed at the top of each report page.

In the body of the screen describe each column of the report. Sequential numbers identify the report columns on the screen. As you list the dictionary items or formulas from top to bottom on the design screen, the fields display on the report from left to right.

For each column of the report identify the data to print in the column. You can enter a dictionary item or a formula that produces a value for the column. Also specify the width of the column, enter the column heading, indicate whether to print subtotals and totals, designate the print format, and indicate where page breaks should occur.

When the report design is complete, proceed to entering selection criteria for the report and then running the report.

►To design a report layout:

1. From the **Reprts** menu, select **Report Writer** to display the report writer view of the Report Writer/Mass Load Design screen.
2. In the **Design ID** field, enter a unique name that identifies the report. The name can be up to 17 characters.

The system prompts you to confirm that this is a new name and then changes any spaces in the name to periods. The system populates the **Created** and **By** fields with the current date and your user ID.

3. In the **File Name** field, press **F10** and select the name of the file to use to construct the report.
4. In the **Title** field, enter the name of the report.

The title displays on the heading of each page in the report and on the Spooler Control screen for the Hold file. The title can contain up to two lines of text, up to 60 characters each. The system centers the title on the top of each printed page. We recommend that the second line of the title be the Report ID.

The title can also contain dollar variables, such as `$$SLS.PROMPT$`, and virtual dates enclosed in exclamation points, such as `!MO/DAY/YR!`.

5. In the **Dict ID/Formula** field, enter the dictionary items to include. You can also enter a formula that performs a calculation on two or more report columns. The system populates the **Width** and **Column Heading** fields with defaults defined for the dictionary item.

Note: You can also enter a dictionary ID followed by a value. For example, enter **DESC,2** for the second value of the DESC dictionary item. In some cases, dictionary item values may have sub-values. To use those sub-values, simply add another comma followed by the sub-value you want to include.

6. In the **Width** field, enter the character width of the report column.

The default setting reflects the width specified for the dictionary item in Dictionary Maintenance. You can change this value. Enter a zero to indicate that a formula uses the value in the column and the value should not print.

7. By default, the system populates the **Column Heading** field with the value from the **Prompt** field on the Eclipse Dictionary Maintenance screen for the dictionary item. You can change this value.

Type a new heading in the field or use the **Hdg** hot key to display an input screen the width of the field. If you use the **Hdg** hot key and the column heading is longer than the column width, the text will wrap. You can use up to three lines for the heading. If the text wraps, an asterisk (*) displays before the Column Heading name.

8. In the **Brk** field, press **F10** and select how to separate information and print subtotals for the report column:

- **N** – No break occurs when the value in the column changes.
- **Y** – The report subtotals all total fields when the value in the column changes.
- **P** – Page break. The report subtotals all total fields when the value in the column changes and a new page begins after the requested subtotals print.

A break leaves a space and prints a total if the Dictionary ID is numeric and the **Totals** column displays a **Y**. The total is for all the items before the last break. A grand total also prints at the end of the report.

Note: If you are going to break on a Dictionary ID, you should also have the Dictionary ID listed as a sort criteria.

9. In the **Tot** field, for a numeric dictionary item or a formula, specify one of the following options:

- **N** – Do not total the column.
- **Y** – Total this column by adding the contents of the column at each break.
- **C** – Calculate a column total at each break using the formula designated for this column.

An asterisk (*) in the **Tot** field indicates that the field is not numeric.

10. In the **Format** field, change the default conversion code, if needed.

The conversion code determines the printed format of numeric data in this column of the report. The system populates this field with a code based on the information specified for the item in Dictionary File Maintenance. To enter multi-valued formats, use the **Hdg** hot key to display the Output Formats screen.

11. Use the **Opt** hot key to display the Report Writer Options screen, where you can set additional report options.

12. Use hot keys, as needed.

Hot Key	Description
Sel Build	Displays the Report Writer/Mass Load Selection screen, where you can select the records to include in a report or mass load.
Adv Selection	Displays the Advanced Report Writer/Mass Load Selection screen, where you can select and sort the records to include in a report or mass load.
Ecl Dct	Displays the Eclipse Dictionary Maintenance screen, where you can view and edit dictionary items.
Col Data	Displays the Column Data screen, where you can enter additional data required to determine the value of a dictionary item in a report or mass load field. Note: An asterisk (*) next to a column number indicates that the selected dictionary item requires column data.
Copy	Displays copy prompts, which you can use to copy a design to a new ID.
Del	Deletes the displayed report design. The system prompts you to confirm the deletion.
Hdg	Displays the prompt associated with the selected dictionary item on an input screen the width of the report column. If the prompt is longer than the column width, the text wraps. The prompt can use up to 3 lines. Note: If you use this hot key in the Format column, an Output Formats screen containing 5 lines displays, where you can add multi-valued formats.
Analyzer	Reserved for future use in analyzing report data.
Run Rpt	Displays the Report Driver screen, from which you can run a report.
Dict Sum	Displays the Dictionary Maintenance Summary screen, where you can view all the dictionary items defined for a file.
Label	Displays the Report Writer Label Specification screen, where you can set the parameters for printing labels.
Opt	Displays the Report Writer Options screen, where you can set final printing or downloading options before creating a report.
Notes	Displays the Notes screen, where you can enter an internal note about this mass load. You can enter up to 999 lines of free-form text.
View	Displays the View Choices screen, where you can change the view of the Report Writer/Mass Load screen.
Begin Load	Displays the Mass Load Driver screen, from which you can run a mass load.
Set Val	Displays the Default/Set Values screen, which gives you more space in which to enter the text to be mass loaded into the designated field.
Log	Displays the Maintenance Log Viewing screen, where you can view the log of changes made to this design.
Files	Displays other files that the current file directly links to.
Path	For dictionary items that are linked to via one or more files, displays the path from one file to the next.

13. Press **Esc** to save the report design.

Setting Report Writer Options

Use the Report Writer Options screen to designate final printing or downloading options before creating a report.

- For a printed report, you can designate the line spacing, whether to print the report selection criteria, and whether to print line numbers for each new item on the report.
- For downloading a report to a PC, you can enter the column and record delimiters to insert and designate whether to trim blanks from the fields of data.

►To set report writer options:

1. From the **Reprts** menu, select **Report Writer** to display the report writer view of the Report Writer/Mass Load screen.
2. Design the report layout.
3. Use the **Opt** hot key to display the Report Writer Options screen.
4. Complete the following fields, as needed:

Field	Description
Spaces Between Lines	Enter the number of spaces to leave between lines. The default is 0.
Print Prompts (Y/N)	Indicate whether to print on the report the prompts entered on the Report Writer/Mass Load Selection screen to select the data for the report.
Print Line Numbers	Indicate whether to print line numbers for each new line on the report. <ul style="list-style-type: none"> • To not print line numbers, leave the field blank or enter a zero. • To print numbers, enter a number specifying the width of the column for the line numbers.
Column Delimiter	For a report you are downloading to a PC, specify the character to insert as the delimiter between columns.
Record Delimiter	For a report you are downloading to a PC, specify the character to insert as a delimiter between records.
Trim Blanks (Y/N)	For a report you are downloading to a PC, indicate whether to trim trailing blanks from the fields of data.

5. Press **Esc** to save this information and return to the Report Writer/Mass Load Design screen, where you can continue to design the report layout.

Downloading Reports to Your PC

Use Report Writer to download information from the database to your PC, where another application can use the data. For example, you can use the download function to copy financial data into a spreadsheet or set up a database with data from the customer file.

For detailed information on downloading a report writer report to your PC, see Downloading Reports in the general reporting help.

Running Report Writer Reports

Use Report Writer to extract information from the database for reporting purposes. You can gather data on customers, products, or accounts in any combination you need.

Once you have designed and created a report, you can run the report.

►To run a report:

1. From the **Reprts** menu, select **Report Writer** to display the report writer view of the Report Writer/Mass Load Design screen.
2. In the **Design ID** field, enter the ID of the report to run. You can also press **F10** and select the report.
3. Use the **Run Report** hot key to display the Report Driver screen.

The prompts for all missing column data and selection data display on the screen. If data is not required, the following message displays: ***Press Desired Hot Key to Continue***.

4. If there is missing data, do one of the following:
 - Enter any missing data on the screen to apply the data for this report.
 - Use the **Column Data** and **Selection Data** hot keys to enter the missing column data or selection data and commit the changes as defaults for the report writer layout.
5. To run the mass load for a sample number of records, position the cursor on the **Sample** field and enter the number of samples.
6. Use the **Notes** hot key to view internal notes about this design.
7. Set options, if needed, and generate the report.

Printing Labels with Report Writer

Use Report Writer to design and print labels for mailing or inventory bins. For example, you can run a report to gather your customers' names and addresses, and then print these on labels for mass mailings. Or, you can run a report for all nonstock items and label the bins with these items accordingly.

► **To print labels using a Report Writer report:**

1. From the **Reprts** menu, select **Report Writer** to display the report writer view of the Report Writer/Mass Load screen.
2. Design a report for a single label.
 - Each column of the report represents one line of the label.
 - Use the same width for each column.
3. Use the **Label** hot key to display the Report Writer Label Specifications screen.
4. Change the default values displayed in the fields, as needed, to define the size and spacing between the labels.

Set the **Print Labels (Y/N)** field to **Y**.

Field	Description
Print Label (Y/N)	Indication whether this report prints labels.
# of Labels Across the Page	Number of columns of labels across the page.
# of Lines per Label (Height)	Maximum number of lines for the height of the label.
# of Lines to Skip Between Labels	Number of lines to skip between rows of labels.
# of Spaces to Indent (Left Margin)	Number of character spaces to indent for the left edge margin before printing the text on the label.
# of Spaces per Label (Width)	Maximum number of character spaces for a line of text on a label.
# of Spaces to Skip Between Labels	Number of character spaces to skip between labels across the page to create the right margin.
Print Null Fields (Y/N)	Indication whether to print null fields, such as blank address lines.
# of Line Up Labels to Print	Number of test labels the system should to print for alignment purposes before printing all of the labels.
# of Copies to Print for Each Label	Number of copies of each label to print.
Print Label Headings (Y/N)	This option is not active.

5. Press **Esc** to return to the Report Writer / Mass Load Design screen.
6. Use the **Run Report** hot key to run the report driver.

The Report Driver screen displays the prompts and default data entered for the required column and selection data.

7. Edit or enter any missing column data or selection data by doing one of the following:
 - Enter any missing data on this screen. This method applies the data only to the current report.
 - Use the **Column Data** and **Selection Data** hot keys to enter the missing data. This method commits the changes as defaults for the report layout.
8. Use the **Print**, **Hold**, or **Opts** hot keys to produce the labels.

Note: We recommend that you test a label report before printing the labels, because different printers interpret printer characteristics in different ways.

Copying Report or Mass Load Designs

When creating a report or mass load whose design is similar to another report or mass load, you can save time by copying the old design to the new report or mass load and then making the needed changes.

► To copy a report or mass load design:

1. With a report or mass load design displayed on the Report Writer/Mass Load Design screen, use the **Copy** hot key to display the copy prompts screen.
The **Work ID** field displays the ID of the design to copy.
2. In the **Copy To** field, enter a new report or mass load ID.
The system copies the displayed design and stores it using the new ID. The screen continues to display the original design.
3. Press **Esc** to exit the original design and display a blank Report Writer/Mass Load screen.
4. In the **Design ID** field, enter the new report or mass load ID.
5. Edit the new report or mass load layout as needed.
6. When finished, press **Esc** to save your changes.

Mass Load Overview

Use Mass Load to update one or more fields of information for a large group of records in a file, such as credit parameters for customers or inventory control parameters for products.

Creating a mass load involves the following four tasks:

- **Designing the Mass Load Screen Layout** – On a mass load screen layout, identify and define the file and fields to update. If you assign an ID and save the mass load design, you can recall and run the mass load any time without redesigning it.
- **Entering Column Data** – A dictionary item used in a column of the layout may require additional data in order to update the correct attribute value in the file. For example, if a dictionary item is multi-valued, you need to indicate the value the mass load should update.
- **Selecting Records for the Mass Load** – Specify the criteria for selecting the records to update. After you select the records to update, the Mass Load program lists the records on a screen. For each record, fields that describe the record and the fields to update display. You can update these fields one record at a time or, if you update each record with the same information, the system can update all of the records at once.

Note: If your company wants to prevent certain files from being updated via a mass load, designate this preference in the File Definition Maintenance screen.

- **Processing the Mass Load** – After you have selected the records for mass load, process the records and do the updates.

For step-by-step instructions, see Creating Mass Loads.

Creating Mass Loads

Use Mass Load to update one or more fields of information for a large group of records in a file, such as credit parameters for customers or inventory control parameters for products.

► **To create a mass load:**

1. From the **Files** menu, select **Mass Load/Update** to display the mass load view of the Report Writer/Mass Load Design screen.
2. Design the mass load update screen layout.
3. When a dictionary item in a column of the layout requires additional data in order to display accurate information on the screen, use the **Column Data** hot key to enter the required column data.
4. Use the **Sel Build** or **Adv Selection** hot key to select and sort the records to update.

Note: You can perform steps 3 and 4 before or after starting the mass load driver in step 5. If you do this before starting the driver, you can save the data and selection criteria as defaults stored with the mass load design.

5. Use the **Begin Load** hot key to start the mass load driver.

The Mass Load Driver screen displays with the prompts and default data entered for the required column and selection data.

6. Edit or enter any column data or selection data that is still required by doing one of the following:
 - Enter any missing data on this screen. This method applies the data only to the current mass load.
 - Use the **Column Data** and **Selection Data** hot keys to enter the missing data. This method commits the changes as defaults for the mass load layout.
7. Use the **Begin** hot key to process the mass load.

The Mass Load Update screen lists the records selected for updating. The columns across the screen show display-only fields and those to update.

8. Enter the updates and then press **Esc** to complete the mass load.

The cursor skips over the fields that you cannot update.

Designing Mass Load Layouts

Use the mass load view of the Report Writer/Mass Load Design screen to design the mass load update layout. In the header portion of the screen, assign an ID to the design and designate the file to update.

In the body of the screen, you need to identify the fields to display on the Mass Load Update screen. Some are the fields to update and some are display-only fields that describe each selected record. Sequential numbers identify the display columns on the screen. As you list the dictionary items or formulas from top to bottom on the design screen, the fields display on the Mass Load Update screen from left to right.

For each column of the display you must identify a dictionary item or formula, specify the width of the column, indicate whether the data in the column is display-only or to be updated, and, if the data is to be updated, how it is to be updated.

When the design is complete, you can continue with entering column data, entering selection data, and then running the mass load.

►To design the screen layout for a mass load:

1. From the **Files** menu, select **Mass Load/Update** to display the mass load view of the Report Writer/Mass Load Design screen.
2. In the **Design ID** field, enter a unique name that identifies the mass load. The name can be up to 17 characters.

The system prompts you to confirm that this is a new name and then changes any spaces in the name to periods. The system populates the **Created** and **By** fields with the current date and your user ID.

3. In the **File Name** field, press **F10** and select the name of the file to update.
4. In the **Title** field, enter a name or short description of the mass load.
5. In the **Dict ID/Formula** field, identify the information to display or update in the corresponding mass load column. Enter one of the following:
 - A dictionary item. Press **F10** to display a list of dictionary items defined for the file. You can also enter a dictionary ID followed by a value and sub-value. For example, enter **DESC,2,3** for the third sub-value of the second value of the DESC dictionary item.

Note: You can update D-type dictionary items that allow updates or I-types that have an update routine defined. The update subroutine points to the file attribute to update. You cannot update the key in attribute 0.

- A formula that manipulates data from other columns. For example, 4+5 adds the values in columns 4 and 5.

6. In the **Width** field, enter the character width of the display column.

For a dictionary item, the system populates this field with the width specified for the dictionary item in Dictionary Maintenance. The information is view-only.

7. In the **Typ** field, indicate the type of data displayed in the designated column of the Mass Load Update screen. Press **F10** and select one of the following:

Option	Data in this mass load column...
D (Display)	displays in view-only mode. The system displays an asterisk (*) following a D when the field is a dictionary item that does not allow updates. Note: If a dictionary item is view-only, during the loading process the Typ field changes to D and the following message displays: The Dict Item: {field name} is not an updatable Mass Load field.
U (Update)	displays in edit mode. <ul style="list-style-type: none"> • If the Default/Set Value field on this screen is blank, you can enter the data for each record on the Mass Load Update screen. • If the Default/Set Value field on this screen contains a value, you can enter this same value for each record on the Mass Load Update screen (one at a time) as you progress through the records using the Enter key.
S (Set)	displays in edit mode and updates according to the data entered in the corresponding Default/Set Value column. Note: Do not use this Typ code until you are sure that you are updating the correct field with the correct data.

8. When the **Typ** code for a column of data is **S** or **U**, the data in the **Default/Set Value** field determines what the system places in that field.

Value	Function
""	A set of quotes with nothing between them replaces the current value in the designated field with a null value.
" "	A space enclosed in quotes replaces the current value in the designated field with a space.
"text"	Text enclosed in quotes replaces the current value in the designated field with this text.
Dict ID	A dictionary ID replaces the current value in the designated field with the value stored in that dictionary ID.
3+2	A number or numerical expression replaces a value in a designated numerical field with the value of that number or expression.
:	A colon links together two values. For example, Dict ID:"TEXT"
	A separator adds the new data and word wraps the data to the length specified for that field in the mass load.
%AM%, %VM%, %SVM%	Specifies new line characters or record delimiters in your data.

Value	Function
blank	If the Typ code is U and you leave this field blank, you can update this field for each record on the Mass Load Update screen. If the Typ code is S , do not leave this field blank.

9. Use the hot keys as needed.

Hot Key	Description
Sel Build	Displays the Report Writer/Mass Load Selection screen, where you can select the records to include in a report or mass load.
Adv Selection	Displays the Advanced Report Writer/Mass Load Selection screen, where you can select and sort the records to include in a report or mass load.
Ecl Dct	Displays the Eclipse Dictionary Maintenance screen, where you can view and edit dictionary items.
Col Data	Displays the Column Data screen, where you can enter additional data required to determine the value of a dictionary item in a report or mass load field. Note: An asterisk (*) next to a column number indicates that the selected dictionary item requires column data.
Copy	Displays copy prompts, which you can use to copy a design to a new ID.
Del	Deletes the currently displayed mass load design. The system prompts you to confirm the deletion.
Hdg	Displays the prompt associated with the selected dictionary item an input screen the width of the report column. If the prompt is longer than the column width, the text wraps. The prompt can use up to 3 lines. Note: If you use this hot key in the Format column, an Output Formats screen containing 5 lines displays, in which you can add multi-valued formats.
Analyzer	Reserved for future use in analyzing report data.
Run Rpt	Displays the Report Driver screen, from which you can run a report.
Dict Sum	Displays the Dictionary Maintenance Summary screen, where you can view all the dictionary items defined for a file.
Label	Displays the Report Writer Label Specification screen, where you can set the parameters for printing labels.
Opt	Displays the Report Writer Options screen, where you can set final printing or downloading options before creating a report.
Notes	Displays the Notes screen, where you can enter an internal note about this mass load. You can enter up to 999 lines of free-form text.
View	Displays the View Choices screen, where you can change the view of the Report Writer/Mass Load screen.
Begin Load	Displays the Mass Load Driver screen, from which you can run a mass load.
Set Val	Displays the Default/Set Values screen, which gives you more space in which to enter the text to mass load into the designated field.
Log	Displays the Maintenance Log Viewing screen, where you can view the log of changes made to this design.

Hot Key	Description
F iles	Displays other files that the current file directly links to.
P ath	For dictionary items that are linked to via one or more files, displays the path from one file to the next.

10. Press **Esc** to save the mass load design.

Running Mass Loads

After designing and creating a mass load, you can run the mass load.

► To run a mass load:

1. From the **Files** menu, select **Mass Load/Update** to display the mass load view of the Report Writer/Mass Load Design screen.
2. In the **Design ID** field, enter the ID of the mass load to run. You can also press **F10** and select the report.
3. Use the **Begin Load** hot key to display the Mass Load Driver screen.
The prompts for all missing column data and selection data display on the screen. If data is not required, the following message displays: ***Press Desired Hot Key to Continue***
4. To enter missing data, do one of the following:
 - Enter any missing data on the Mass Load Driver screen to apply the data for this run.
 - Use the **Column Data** and **Selection Data** hot keys to enter the missing data and commit the changes as defaults for the mass load layout.
5. To run the mass load for a sample number of records, position the cursor on the **Sample** field and enter the number of samples.
6. Use the **Notes** hot key to view internal notes about this design.
7. Use the **Begin** hot key to run the mass load.

The Mass Load Update screen lists the records selected for updating.

For each record to update, the screen displays the fields listed on the Report Writer/Mass Load Design screen. The width of the displayed data may be greater than the width of the screen. If necessary, use the right and left arrow keys to view fields that are not visible.

8. Update each field.

The cursor moves only to fields that you can update. The screen uses the **Disp Lines** and **Max Lines** values set in the dictionary for the item. The types are as follows:

Type	Function
D	The information in this field is view-only.
S	The records display with the new value already in that field.
U	<ul style="list-style-type: none"> • If no value displays for the field on the Report Writer/Mass Load Design screen, you can type a new value in this field. • If a value displays for the field on the Report Writer/Mass Load Design screen, you can accept the value by positioning the cursor on the field and pressing Enter.

9. Press **Esc** to exit the mass load.

Record Selection Overview

After you have designed a report layout or a mass load display layout, you need to specify the criteria for selecting the records to include in the report or mass load.

The program offers two selection processes. One is a standard selection process and the other is an advanced selection process. Each selection process uses a series of conditional statements. The first conditional statement selects a subset of records from the file. Each additional statement selects records from the prior subset. The standard process is more structured and has less functionality than the advanced process. The following paragraphs explain the differences between the two selection processes.

Using Standard Record Selection

On the Report Writer/Mass Load Selection screen, you can enter one conditional expression at a time and assign it a select number. You can do this up to five times. The system evaluates multiple select statements in order according to their assigned select numbers.

Each conditional statement uses a combination of verbs, modifiers, conjunctions, dictionary item names, and operators to select a subset of records from the file being used to generate the report or mass load. The structure of the screen removes most of the guesswork from creating conditional expressions.

The limitations are as follows:

- The select statement on each screen links to the next with an implied AND operator.
- One select statement can contain multiple conditions, but you cannot use parentheses in the expression to change the order in which the statement evaluates.

Using Advanced Record Selection

On the Advanced Report Writer/Mass Load Selection screen, you can enter up to five conditional statements to specify selection criteria, all on the same screen. Each conditional statement uses a combination of verbs, modifiers, conjunctions, dictionary item names, and operators to select a subset of records from the file being used to generate the report or mass load. To use this screen, you need to have a good understanding of the verbs, operators, and rules for creating conditional statements.

Additional differences that make this option more advanced are:

- If you have two files that use the same record ID, you can select records from one file and then run the report based on information stored in the other file.
- You can use parentheses in conditional expressions to change the order in which the expression evaluates.

Using Standard Record Selection

Use the Report Writer/Mass Load Selection screen to specify the criteria for selecting the records to include in a report or mass load.

To specify selection criteria, you need to build one or more conditional statements. You can use this screen up to five times to create multiple conditional statements. The conditional statement on one select screen connects to the conditional statement on the next select screen by an implied AND operator. Each additional statement applies to the records selected by the previous select statement.

Enter each condition on a separate line. Connect each line to the next with the AND or OR conjunction.

- **AND** – The condition on the previous line and the condition on the given line must both be true to select a record.
- **OR** – Either the condition on the previous line or the condition on the given line must be true to select the record.

The system populates the conjunction column for the first condition with three asterisks. This corresponds to WITH in TCL.

► To enter selection data using the Report Writer/Mass Load Selection screen:

1. With a report or mass load design displayed on the Report Writer/Mass Load Design screen, use the **Select Build** hot key to display the Report Writer/Mass Load Selection screen.

The **File Name** field identifies the file from which to select records for the report or mass load.

2. To run a report or mass load for a limited number of records, enter that number in the **Sample** field.

This is useful for testing the design on a sample number of records before processing the entire file. You can also use this field to generate reports such as Top 100 Products or Top 10 Customers.

3. In the **Reselect (Y/N)** field, indicate whether the system should re-select the records each time the report or mass load runs.
4. In the body of the screen, enter a conditional statement that selects a subset of records from the files the files you identified on the report or mass load design screen. Use a combination of conjunctions, dictionary item names, operators, and comparison values to create the conditional statement.

- You can only have one conditional statement per Report Writer/Mass Load Selection screen.
- One statement can contain multiple conditions, as long as you:
 - Enter each condition on a separate line.

- Start the first condition with ***.
- Connect each additional condition to the previous line with the AND or OR conjunction.
- We recommend that you *not* use ANDs and ORs in the same condition.
- *Do not* use parentheses in the statement to change the order in which the statement is evaluated.

Note: To delete a selection statement, use the **Delete Sel** hot key. The system prompts you to confirm the deletion.

5. Use the **Edit Prompts** hot key, as needed, to change the default column heading or prompt defined for the associated dictionary item.
6. Use the **Add Slet** hot key to enter up to four additional conditional statements.

From the displayed list, do one of the following:

- Select **New** to display a blank Report Writer/Mass Load Selection screen, where you can enter a new conditional statement.
- Select the number of another select screen.

The conditional statement on one select screen connects to the conditional statement on the next select screen by an implied AND operator. Each additional statement applies to the records selected by the previous select statement.

Note: To delete the displayed select statement, use the **Delete Sel** hot key.

7. Use the **Sort** hot key to enter sort criteria for the report or mass load data.

On the Sort Sequence screen enter the dictionary items by which to sort the records. For each dictionary item, indicate whether to sort the records in ascending or descending sequence.

8. Use the **Selection Data** hot key to enter default selection data values, as needed.

In some cases, the system requires additional data from you for a dictionary item listed on the Report Writer/Mass Load Selection screen to select the correct record.

9. Use the **Begin Sel** hot key to select and sort the records.

If the program requires selection data, the Selection Prompts screen displays. The screen lists the prompts for any required selection data for which defaults do not exist. Enter the requested information for each prompt and press **Enter**.

The **Count** field in the upper right corner of the screen displays the number of records selected by each select statement.

Note: The system saves selections in select lists named REP~ Report ID n, where **n** is the selection number. You can display these lists using TCL. New selection lists overwrite previous selection lists.

10. Press **Esc** to return to the Report Writer/Mass Load Design screen, where you can run the report or begin the mass load.

Entering Sort Criteria for Standard Record Selection

After defining the selection criteria for a report or mass load, you need to define the sort criteria for the report or mass load data.

On the Sort Sequence screen enter the dictionary items by which to sort the records. For each dictionary item, indicate whether to sort the records in ascending or descending sequence.

► To enter sort criteria for standard record selection:

1. With a report or mass load design displayed on the Report Writer/Mass Load Design screen, use the **Select Build** hot key to display the Report Writer/Mass Load Selection screen.
2. Use the **Sort** hot key to display the Sort Sequence screen.
3. For each dictionary item listed on the screen, in the **Order** column indicate whether to sort the records in ascending or descending sequence. If you leave this field blank, the default value is **A**.
 - **A** – Ascending
 - **D** – Descending
4. Press **Esc** to save this information and return to the Report Writer/Mass Load Selection screen.

Note: If you link to a dictionary item in another file, you can determine the file path from the current file to the target file using the **Path** hot key.

Using Advanced Record Selection

On the Advanced Report Writer/Mass Load Selection screen you can enter up to five conditional expressions that select and sort a subset of records from the file used to generate the report or to update by the mass load. Each expression uses a combination of verbs, modifiers, conjunctions, dictionary item names, and operators to select a subset of records from the file. The system applies each additional expression to the records selected by the previous expression.

►To enter selection data using the Advanced RW/ML Selection screen:

1. With a report or mass load design displayed on the Report Writer/Mass Load Design screen, use the **Adv Selection** hot key to display the Advanced Report Writer/Mass Load Selection screen.
2. To run a report or mass load for a limited number of records, enter that number in the **Sample** field.

This is useful for testing the design on a sample before processing the entire file and obtaining reports such as Top 100 Products or Top 10 Customers.

3. In the **Reselect (Y/N)** field, indicate whether the system should re-select the records each time the report or mass load is run.
4. Enter up to five conditional statements using TCL retrieve sentence operators.
 - You can only have one conditional statement per line; start the first statement with **WITH**.
 - One statement can contain multiple conditions; connect each additional condition to the previous one with the **AND** or **OR** conjunction.
 - We recommend that you *not* use **ANDs** and **ORs** in the same condition.
 - You can use parentheses in the statement to change the order in which the statement evaluates.
 - Use the **BY** and **BY-DESC** operators to enter sort criteria.

Note: To clear statements from the screen, use the **Delete Selections** hot key. The system prompts you to confirm the deletion.

5. Use the **Selection Data** hot key to enter default selection data values, as needed.

In some cases, the system requires additional data from you for a dictionary item listed on the Report Writer/Mass Load Selection screen to select the correct record.

6. Use the **Begin Select** hot key to select and sort the records.

If the program requires selection data, the Selection Prompts screen displays. The screen lists the prompts for any required selection data for which defaults do not exist. Enter the requested information for each prompt and press **Enter**.

The **Count** column displays the number of records selected by each conditional expression.

7. Press **Esc** to return to the Report Writer/Mass Load Design screen, where you can run the report or begin the mass load.

Creating Conditional Statements

A conditional statement selects a subset of records from the file for generating the report or mass load display. Use a combination of conjunctions, dictionary item names, operators, and comparison values to create the conditional statement.

We recommend that you attend a Report Writer/Mass Load class to learn how to use variables and placeholders in conditional statements. The following sections describe basic rules for creating conditional statements:

- Standard Report Writer/Mass Load Selection Screen
- Advanced Report Writer/Mass Load Selection Screen

Standard Report Writer/Mass Load Selection Screen

Use the guidelines in the following table for creating a conditional statement on the standard Report Writer/Mass Load screen:

In this column...	Enter...
Conj	<p>a term that links the condition defined on a given line to the condition defined on the previous line in a multi-conditional selection statement.</p> <ul style="list-style-type: none"> • *** designates the beginning of a conditional statement. • AND indicates that the condition on the previous line and the condition on the given line must both be true for a record to be selected. • OR indicates that either the condition on the previous line or the condition on the given line must be true for the record to be selected. • GET identifies the name (in the Compare To column) of a previously saved Select List that was created in TCL (True Command Language) using UniVerse Retrieve commands. If used, this must be on the first line of the first Select.
Dictionary Name	<p>the dictionary item to use for this conditional statement.</p> <p>For each record entering the selection process, the system compares the value in this field to the value in the Compare To column using the operator entered in the Op column, and determines whether the record meets the selection criteria.</p>
Op	<p>an operator that expresses the condition. Press F10 and select one of the following options:</p> <ul style="list-style-type: none"> • = Equal To • # Not Equal To • < Less Than • > Greater Than • <= Less Than or Equal To • >= Greater Than or Equal To

In this column...	Enter...
Compare To	<p>the value to which the system compares each designated dictionary item, to determine whether to select the record for the report. This can be:</p> <ul style="list-style-type: none"> • A dictionary item from the file used to create the report or mass load. • One or more text strings enclosed in quotation marks. The system infers a logical OR between multiple strings. For example, "SMITH" "JONES" means Smith or Jones. • A null or blank value. • A user-defined prompt. <p>The value you enter can use the following wildcard characters:</p> <ul style="list-style-type: none"> • To select any record whose dictionary value ends with the text string entered, enter a string of characters preceded by a left square bracket, such as [ING. • To select any record whose dictionary value begins with the text string entered, enter a string of characters followed by a right square bracket, such as GAR]. • To select any record whose dictionary value contains that text string anywhere in the value, enter a string of characters preceded by a left square bracket and followed by a right square bracket, such as [DESC]. • To select any record whose dictionary value starts and ends with designated text, but can contain anything in between, use the "^" symbol as a one-character wildcard. For example, use B^^^ING to select any 6-letter word that begins with B and ends with ING. <p>To have the system prompt you to enter a Compare To value at the time the report or mass load runs, type a character or word between two dollar signs, such as \$STATE\$. The text between the dollar signs is <i>not</i> the prompt. By default, the system uses the corresponding dictionary item's Prompt value. Use the Edit Prompts hot key to view or change the prompt.</p>

Advanced Report Writer/Mass Load Selection Screen

On the Advanced Report Writer/Mass Load Selection screen, enter the same type of conditional statement described for the standard selection screen using the standard TCL retrieve sentence operators. This screen does not display the different parts of the statement in separate columns. You can enter up to five conditional statements on this screen.

Identifying Dictionary Items to Include

When writing a report or running a mass load, you identify which dictionary items you want to include. These dictionary items may be in the file in which you are working, or in other related files. Enter dictionary items in the format below.

If you want to include...	And you know...	Then enter...
a dictionary item from the current file	all, or part, of the dictionary item name	all, or part, of the dictionary item name and press Enter . If more than one dictionary item contains the text you enter, a selection list displays. Select the dictionary item you want.
a dictionary item from a related file	all, or part, of the dictionary item name	a forward slash (/) followed by all, or part, of the dictionary item name (/CUST, for example) and press Enter . If more than one dictionary item contains the text you enter, a selection list displays. Select the dictionary item you want.
a dictionary item from a related file	all, or part, of the file name in which the dictionary item resides	an exclamation point (!) followed by all, or part, of the file name (!CUST, for example) and press Enter .
a dictionary item from a related file	the full file name and all, or part, of the dictionary item name	an exclamation point (!) followed by the full file name followed by a tilde (~) followed by all, or part, of the dictionary item name (!CUST~NAME, for example) and press Enter .

Note: When linking to files outside of the current file, you may be prompted to select a file path from a list of choices. Choose the path that ends with the file you want to include (usually the shortest path). If you are unsure which path is correct, ask your system administrator. **If you choose the wrong path, you could link to the wrong data.**

Viewing Dictionary Item File Paths

When creating Report Writer reports, if you link to a dictionary item in another file, you can determine the file path from the current file to the target file using the **Path** hot key. This hot key, which can be accessed from more than one screen, displays the File Path screen, shown below.

This view-only screen displays the target file and target dictionary item in the **End File** and **End Dict** fields, respectively. The **File** and **Foreign Key** columns display the Path from the current file to the target dictionary item, line by line. In the example below, the path begins at the *Entity* file. This file contains the *Home_Territory* dictionary item, which is the key to the *Territory* file.

File Path	
End File : TERRITORY	
End Dict : ENTITY_ID	
File	Foreign Key
ENTITY	HOME_TERRITORY
TERRITORY	
1 of 2	

Editing Prompts

The Edit Prompts screen displays the default column heading or prompt defined for each dictionary item listed as selection data or column data for the report or mass load. This screen lists:

- Prompts identified in the **Compare To** column on the Report Writer/Mass Load Selection screen or the compare-to portion of a conditional statement on the Advanced Report Writer/Mass Load Selection screen.
- Prompts for any dictionary item on this screen that has Dictionary Common Prompts defined on the Eclipse Dictionary Maintenance screen.
- Prompts for any dictionary item on the selection screen that requires Column Data.

Use the Edit Prompts screen to modify the selection prompts for the selected report writer/mass load design.

►To edit a prompt:

1. With a report or mass load design displayed on the Report Writer/Mass Load Design screen, do one of the following:
 - Use the **Select Build** hot key to display the Report Writer/Mass Load Selection screen.
 - Use the **Adv Selection** hot key to display the Advanced Report Writer/Mass Load Selection screen.
2. From either screen, use the **Edit Prompts** hot key to display the Edit Prompts screen.
3. To edit a prompt, type over the displayed text.
4. Press **Esc** to save your changes and return to the selection screen.

Selection Data Overview

A report layout or mass load layout defines the fields of data to use, but you may still have to enter record selection and column data that tells the program which subset of records and fields to select for the report or mass load.

Entering Record Selection Data

In some cases the system requires you to enter additional data to select the correct record. For example, if you are running a monthly branch activity report, you need to identify the branch and month for which to run the report.

Entering Column Data

In some cases the system requires additional data from you for a dictionary item listed on the Report Writer/Mass Load Design screen to produce accurate information. For example, if a dictionary item is multi-valued, you need to indicate the value to use for the report or to update by the mass load. If an I-Descriptor dictionary item determines a report field value, you may need to enter additional information, such as start and end dates, to evaluate the I-Descriptor formula.

Entering Record Selection Data

In some cases the system requires you to enter additional data for a conditional statement listed on the Report Writer/Mass Load Selection screen to select the correct record.

The following tasks describe two ways you can enter the requested data:

- *As defaults* to be used every time the selection is done.
- *On demand* when you begin the selection process.

Entering Selection Data Defaults

The program uses any data you enter on the Selection Data screen as the default selection data every time you perform the selection.

►To enter default selection data for a report or mass load:

1. With a report or mass load design displayed on the Report Writer/Mass Load Design screen, do one of the following:
 - Use the **Select Build** hot key to display the Report Writer/Mass Load Selection screen.
 - Use the **Adv Selection** hot key to display the Advanced Report Writer/Mass Load Selection screen.
2. From either screen, use the **Selection Data** hot key to display the Selection Data screen.

The **Selection** column lists the user-defined fields or dictionary items that require input. The **Prompt** column displays the prompt for each field.

Note: To edit a prompt, use the **Edit Prompts** hot key on the Report Writer/Mass Load Selection screen.

3. In the **Data** column, enter the data described in the **Prompt** field.

The program uses this data to calculate the value to print in the designated column of the report or display in the designated column of the mass load update screen.

Use the **Multi** hot key to enter multiple values in response to a prompt. If you enter multiple values, *Multi* displays as the field value.

Use the **Delete Data** hot key, as needed, to clear the **Data** column.
4. Press **Esc** to save the selection data and return to the previous screen.

Responding to Selection Data Prompts

If you have not specified default selection data for a report or mass load, then the system prompts you to enter the data when you begin the selection process.

► **To enter selection data as you begin to process a selection:**

1. With a report or mass load design displayed on the Report Writer/Mass Load Design screen, do one of the following:
 - Use the **Select Build** hot key to display the Report Writer/Mass Load Selection screen.
 - Use the **Adv Selection** hot key to display the Advanced Report Writer/Mass Load Selection screen.

2. From either screen, use the **Begin Select** hot key to start the selection process.

If the program requires selection data and defaults are not set up, the Selection Prompts screen displays. The screen lists the prompts for any required selection data.

3. In the **Data** column, enter the data described in the **Prompt** field.

The program uses this data to calculate the value to print in the designated column of the report or display in the designated column of the mass load screen.

- Use the **Multi** hot key to enter multiple values in response to a prompt. If you enter multiple values, *Multi* displays as the field value.
- Use the **Delete Data** hot key, as needed, to clear the **Data** column.

4. Press **Enter** or **Esc** continue the selection process.

Entering Column Data

In some cases, the system requires additional data from you for a dictionary item listed on the Report Writer/Mass Load Design screen to produce accurate information. For example, if a dictionary item is multi-valued, you need to indicate the value to use for the report or to update by the mass load. If an I-Descriptor dictionary item determines a report field value, you may need to enter additional information, such as start and end dates, to evaluate the I-Descriptor formula.

An asterisk displayed next to a column number on the Report Writer/Mass Load Design screen indicates that the field requires column data. When you position the cursor on a field that requires column data, the **Column Data** hot key highlights.

Use the Column Data screen for entering additional data required for a report or mass load field.

► To enter column data for a report or mass load:

1. On a Report Writer/Mass Load Design screen that is set up for a report or a mass load, position the cursor on a field that requires column data and use the **Col Data** hot key to display the Column Data screen.

You can also display this screen using the **Column Data** hot key on the Report Driver or Mass Load Driver screens.

This screen displays the column number, first line of the column heading, and dictionary item prompt for each field that requires additional data from you.

Note: To edit a prompt, use the **Edit Prompts** hot key on the Report Writer/Mass Load Selection screen.

2. Use the **Expand** hot key, as needed, to display the complete column heading for an item.

The display screen is the width of the column heading. You can change the text of the heading in this screen. If the column heading is longer than the column width, the text wraps. You can use up to three lines for the heading. If the text wraps, an asterisk (*) precedes the text in the **Column Heading** field. Mass Load only uses the first line of the heading.

3. In the **Data** field for each listed item, enter the data described in the **Prompt** field. The program uses this data to calculate the value to print in the designated column of the report or display in the designated column of the mass load update screen.

Note: If the prompt is for a multi-valued position, enter **0** to indicate *all* values, **1** to indicate the first value, **2** to indicate the second value, and so forth.

You can use the **Delete Data** hot key to clear all data from the **Data** column. Eclipse prompts you to confirm the deletion.

4. Press **Esc** to save the column data and return to the previous screen.

Conversion Codes and Operators Overview

The Report Writer/Mass Load program uses standard formula operators for creating expressions that select and display records and data. Pick conversion codes designate how to display numerical data.

The following topics describe the conversion codes and operators you can use with this program:

- RW/ML Formula Operators
- RW/ML Format Conversion Codes
- TCL Retrieve Sentence Operators

RW/ML Formula Operators

The following table lists the formula operators used by Report Writer/Mass Load.

Operator	Description	Example
+	Add	4+5, adds the value in column 4 to the value in column 5.
-	Subtract or negation	4-5, subtract the value in column 5 from the value in column 4. -5, a negative value.
/	Divide	4/5, divide the value in column 4 by the value in column 5.
*	Multiply	4*5, multiply the values in columns 4 and 5.
" or '	Constants	"4" + "5" = 9 '4' + '5' = 9 When numeric values are enclosed in double quotes (") or single quotes ('), the actual numeric value, as opposed to the column number, is being referenced.
()	Change the order of evaluation.	2*(3+4) is interpreted as 2*7=14 (2*3)+4 is interpreted as 6+4=10.

RW/ML Format Conversion Codes

The following tables list the Pick format conversion codes used by Report Writer/Mass Load.

Decimal Numbers / Money

Code	Data	Output
MR0	123456	123456
MR2	123456	1234.56
MR3	123456	123.456
MR23	123456	123.46
MR2,	123456	1,234.56
MR2,\$	123456	\$1,234.56
MR2,\$*12	123456	\$***1,234.56
MR2E	-123456	<1234.56>
MR2D	123456	1234.56DB
MR2C	-123456	1234.56CR
MR29	1234560000	1.23
MR29	1237891234	1.24

Dates

Code	Data	Output
D	10851	15 SEP 1997
D2-	10851	09-15-97
D4-	10851	09-15-1997
D2/	10851	09/15/97
D4/	10851	09/15/97
DI	09/15/97	10851

Time

Code	Data	Output
MT	32400	9:00
MT	54000	15:00
MTH	3600	01:00AM
MTH	46800	01:00PM
MTS	54000	15:00:00
MTHS	54000	3:00:00PM

Case/Character

Code	Data	Output
MCA	#123ABC*	ABC
MC/A	#123ABC*	#123*
MCN	#123ABC*	123
MCT	JOHN DOE	John Doe
MCU	John Doe	JOHN DOE
MCL	John Doe	john doe

TCL Retrieve Sentence Operators

Use the following operators to create conditional expressions on the Advanced Report Writer/Mass Load Selection screen.

Use this Operator...	To select a record if the attribute value...
= EQ EQUAL	is equal to the reference value.
# NE NOT NO <> ><	is not equal to the reference value.
>GT AFTER GREATER	is greater than the reference value.
< LT BEFORE LESS	is less than the reference value.
>= GE	is greater than or equal to the reference value.
<= LE	is less than or equal to the reference value.

Use the following operators to determine a sort sequence for the data:

Use this Operator	To...
BY	sort by the reference value in ascending order.
BY-DSND	sort by the reference value in descending order.

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