



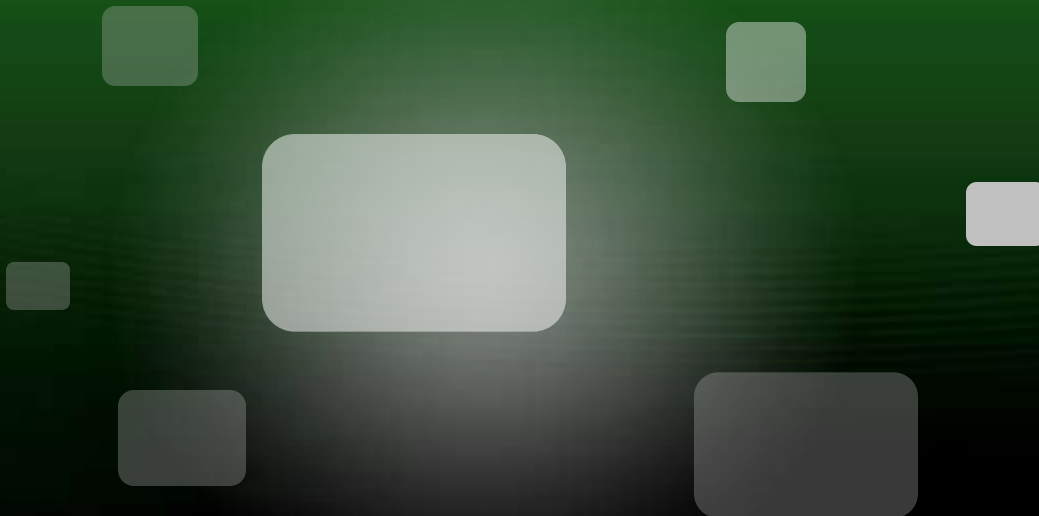
RUC 2012



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## Build Custom Quick Reports

Marilyn Grant



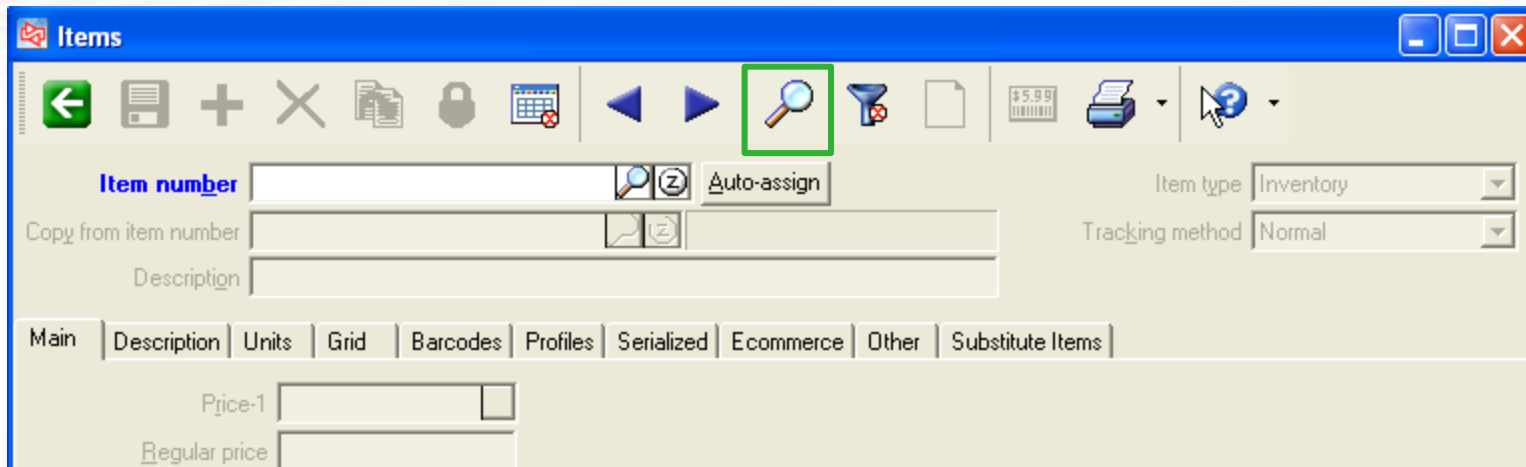
# Agenda

## You will learn how to:

- **Use Column Designer to build a custom lookup**
- **Preview a Quick Report of the lookup**
- **Save the Quick Report**
- **Add a menu selection that runs the Quick Report**
- **Customize a filter for the report**

# Start in a Maintenance Menu Selection

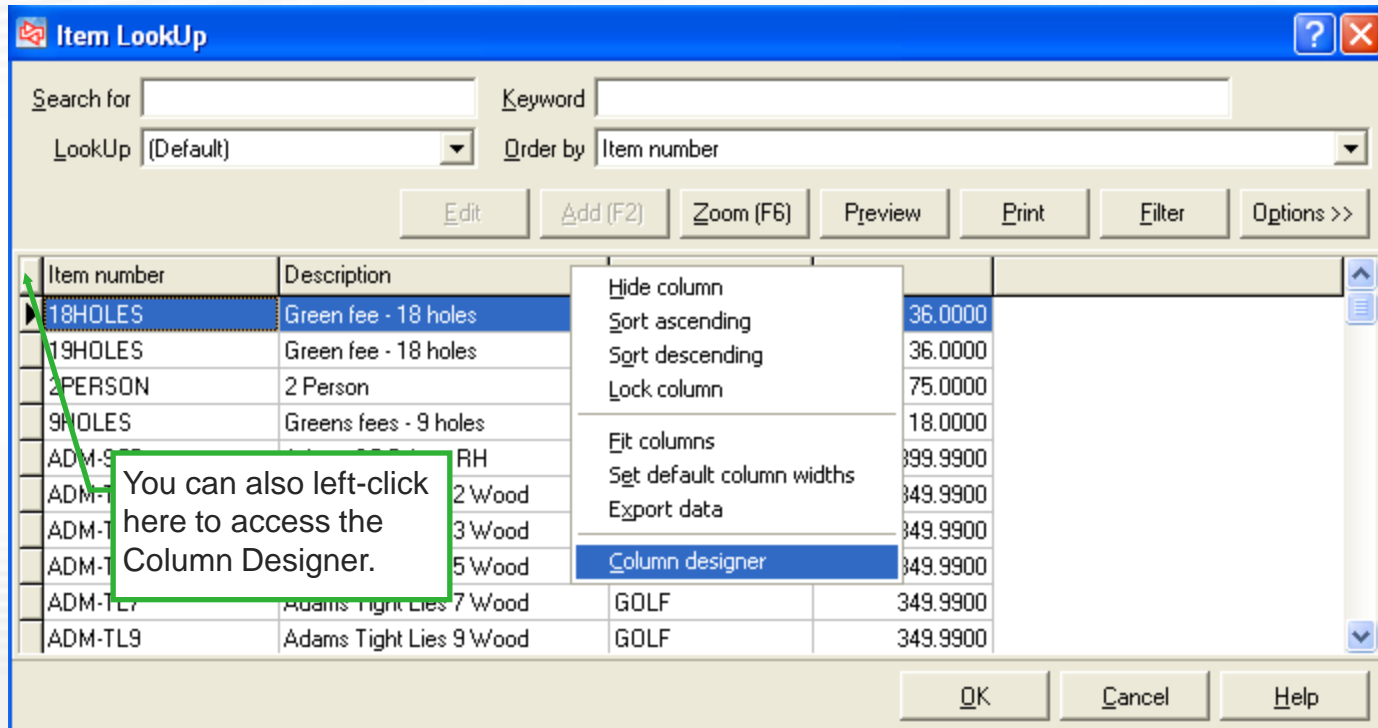
## Select Inventory / Items



Click  to open a lookup window for the table.

# Add Columns using Column Designer

## Use Column Designer to add any additional columns



The screenshot shows the 'Item LookUp' dialog box. At the top, there are search fields for 'Search for' and 'Keyword', and dropdown menus for 'LookUp' (set to '(Default)') and 'Order by' (set to 'Item number'). Below these are buttons for 'Edit', 'Add (F2)', 'Zoom (F6)', 'Preview', 'Print', 'Filter', and 'Options >>'. The main area contains a table with columns for 'Item number', 'Description', and a price column. A context menu is open over the table, listing options: 'Hide column', 'Sort ascending', 'Sort descending', 'Lock column', 'Fit columns', 'Set default column widths', 'Export data', and 'Column designer' (which is highlighted). A green callout box with an arrow pointing to the 'Column designer' option contains the text: 'You can also left-click here to access the Column Designer.'

Item number	Description	
18HOLES	Green fee - 18 holes	36.0000
19HOLES	Green fee - 18 holes	36.0000
2PERSON	2 Person	75.0000
9HOLES	Greens fees - 9 holes	18.0000
ADM-S	RH	999.9900
ADM-T	2 Wood	349.9900
ADM-T	3 Wood	349.9900
ADM-T	5 Wood	349.9900
ADM-TL7	Adams Tight Lies 7 Wood	GOLF 349.9900
ADM-TL9	Adams Tight Lies 9 Wood	GOLF 349.9900

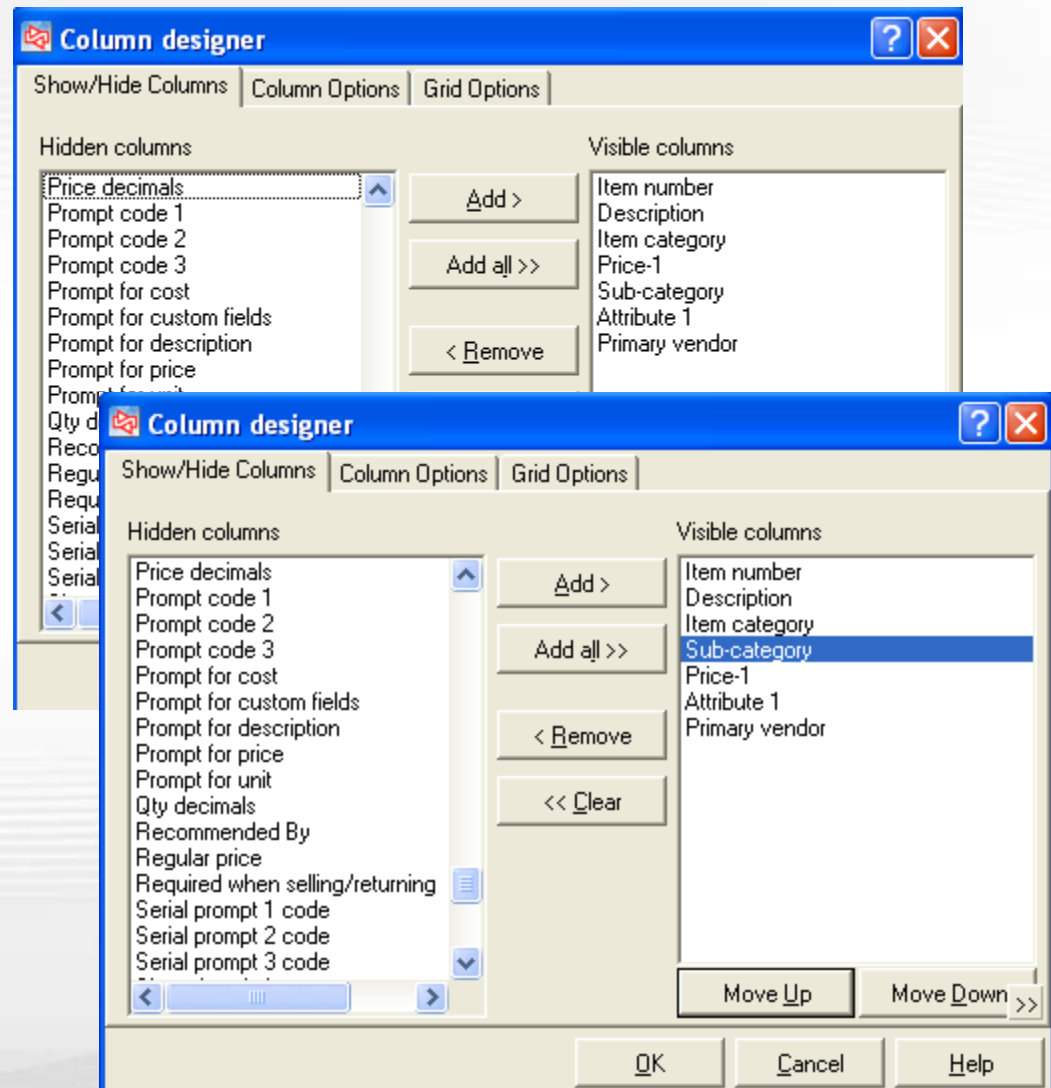
# Add Columns using Column Designer

Add these columns to the Visible columns:

**Sub-category**  
**Attribute 1**  
**Primary vendor**

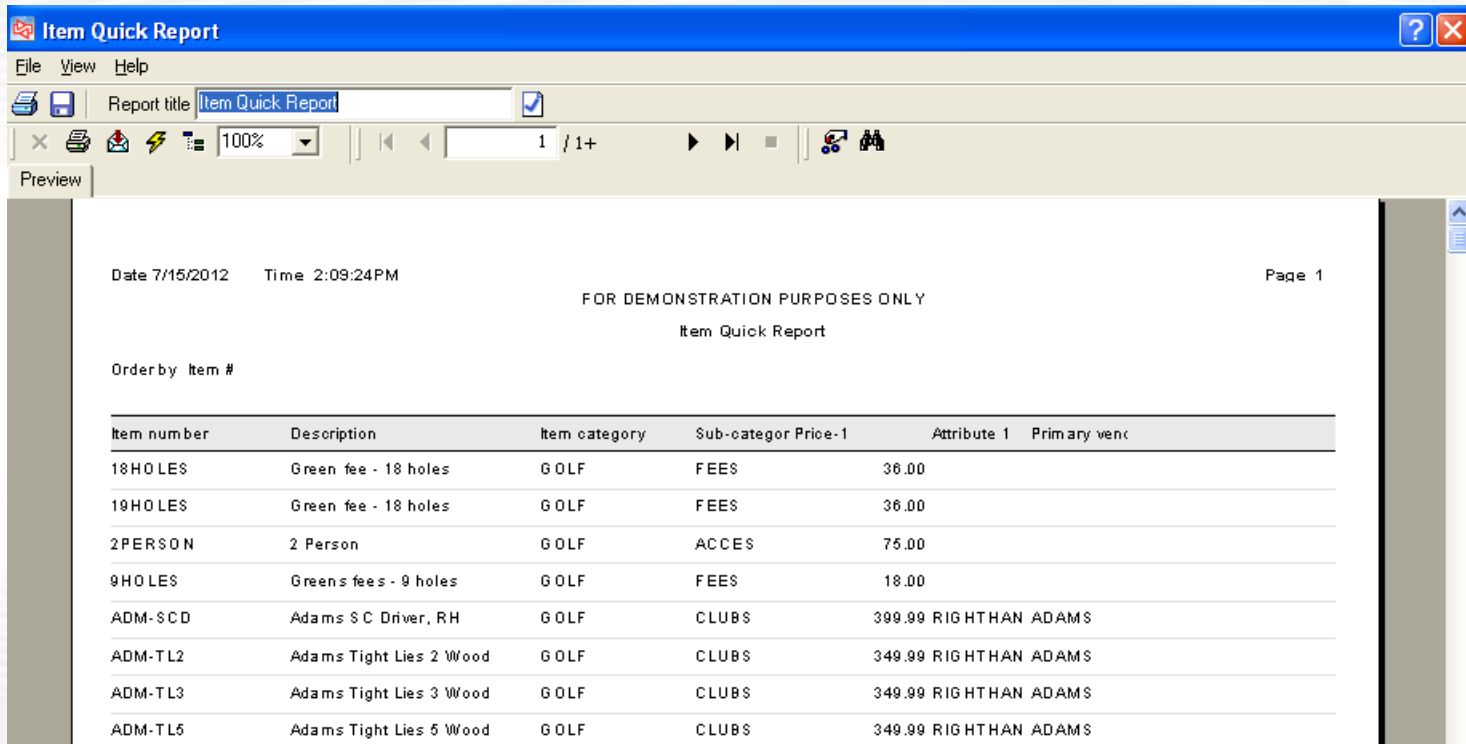
Move Sub-category up so that it falls after Item category.

Click OK to return to the lookup window.



# Preview the Customized Quick Report

When you return to the lookup, click  to see the Quick Report.



The screenshot shows a software window titled "Item Quick Report" with a menu bar (File, View, Help) and a toolbar. The report content includes a date and time stamp, a page number, and a disclaimer. Below this is a table with columns for item number, description, category, sub-category, price, and vendor. The table lists various golf-related items such as green fees, 2-person access, and club memberships.

Item number	Description	Item category	Sub-categor	Price-1	Attribute 1	Primary vend
18HOLE\$	Green fee - 18 holes	GOLF	FEE\$	36.00		
19HOLE\$	Green fee - 18 holes	GOLF	FEE\$	36.00		
2PERSON	2 Person	GOLF	ACCES	75.00		
9HOLE\$	Greens fees - 9 holes	GOLF	FEE\$	18.00		
ADM-SCD	Adams S C Driver, RH	GOLF	CLUB\$	399.99	RIGHTHAN	ADAMS
ADM-TL2	Adams Tight Lies 2 Wood	GOLF	CLUB\$	349.99	RIGHTHAN	ADAMS
ADM-TL3	Adams Tight Lies 3 Wood	GOLF	CLUB\$	349.99	RIGHTHAN	ADAMS
ADM-TL5	Adams Tight Lies 5 Wood	GOLF	CLUB\$	349.99	RIGHTHAN	ADAMS

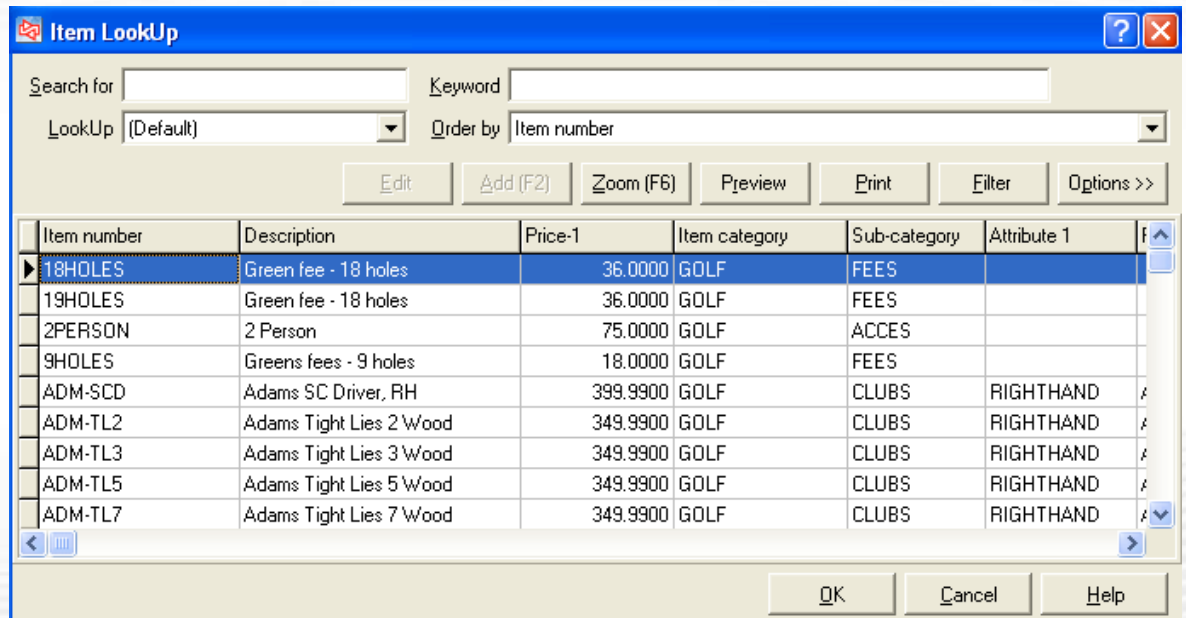
All of the columns appear, but some are truncated and Price-1 values are far to the right of the column heading.

# Fine-tune the Lookup

Close the Quick Report to return to the Lookup window.

Move the columns so that they appear in this order:

Item number  
Description  
Price-1  
Item category  
Sub-category  
Attribute 1  
Primary vendor



The screenshot shows the 'Item Lookup' window with a table of items. The columns are: Item number, Description, Price-1, Item category, Sub-category, and Attribute 1. The first row is selected, showing '18HOLES' with a description of 'Green fee - 18 holes' and a price of 36.0000. The 'Sub-category' column is currently empty for this row.

Item number	Description	Price-1	Item category	Sub-category	Attribute 1
18HOLES	Green fee - 18 holes	36.0000	GOLF	FEES	
19HOLES	Green fee - 18 holes	36.0000	GOLF	FEES	
2PERSON	2 Person	75.0000	GOLF	ACCES	
9HOLES	Greens fees - 9 holes	18.0000	GOLF	FEES	
ADM-SCD	Adams SC Driver, RH	399.9900	GOLF	CLUBS	RIGHTHAND
ADM-TL2	Adams Tight Lies 2 Wood	349.9900	GOLF	CLUBS	RIGHTHAND
ADM-TL3	Adams Tight Lies 3 Wood	349.9900	GOLF	CLUBS	RIGHTHAND
ADM-TL5	Adams Tight Lies 5 Wood	349.9900	GOLF	CLUBS	RIGHTHAND
ADM-TL7	Adams Tight Lies 7 Wood	349.9900	GOLF	CLUBS	RIGHTHAND

Expand the Sub-category heading by clicking and dragging it to the right. Do the same for the Attribute 1 field.

# Fine-tune the Lookup

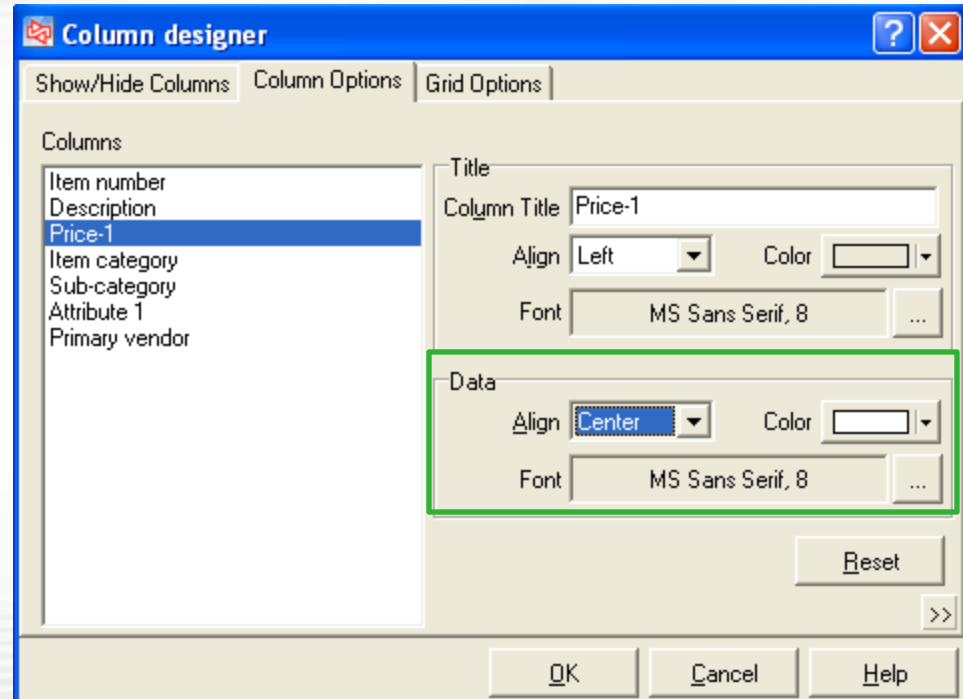
Now let's correct the alignment problem for Price-1.

Open Column Designer again.

Switch to the Column Options tab and select Price-1.

In the Data group, set Align to Center.

Click OK to close the Column Designer.





# Save the Lookup

The lookup now looks like this:

Save the modified lookup. Click Options >> and select Save As...

Save the lookup as **User Conference**.

The screenshot shows the 'Item LookUp' application window. At the top, there are search fields for 'Search for' and 'Keyword', and dropdown menus for 'LookUp' (set to 'Default') and 'Order by' (set to 'Item number'). Below these are buttons for 'Edit', 'Add (F2)', 'Zoom (F6)', 'Preview', 'Print', 'Filter', and 'Options >>'. The main area contains a table with the following data:

Description	Price-1	Item category	Sub-category
Green fee - 18 holes	36.0000	GOLF	FEES
Green fee - 18 holes	36.0000	GOLF	FEES
2 Person	75.0000	GOLF	ACCES
Greens fees - 9 holes	18.0000	GOLF	FEES
Adams SC Driver, RH	399.9900	GOLF	CLUBS
Adams Tight Lies 2 Wood	349.9900	GOLF	CLUBS
Adams Tight Lies 3 Wood	349.9900	GOLF	CLUBS
Adams Tight Lies 5 Wood	349.9900	GOLF	CLUBS
Adams Tight Lies 7 Wood	349.9900	GOLF	CLUBS

A context menu is open over the first row, showing options: 'Filter', 'Show all', 'Save', 'Save As...', 'Delete', 'Reload lookup', and 'Column designer'. The 'Save As...' option is selected. A 'Save to Database...' dialog box is also open, with 'Save name' set to 'UserConference' and 'OK' and 'Cancel' buttons.

# Preview the Quick Report

Preview the Quick Report again and notice the improvements.



The screenshot shows a software window titled "Item Quick Report" with a menu bar (File, View, Help) and a toolbar. The report content includes a date and time, a page number, and a table of items. The table has columns for item number, description, price, category, sub-category, attribute, and vendor.

Date 7/15/2012 Time 2:49:45PM Page 1


FOR DEMONSTRATION PURPOSES ONLY

Item Quick Report

Order by Item #

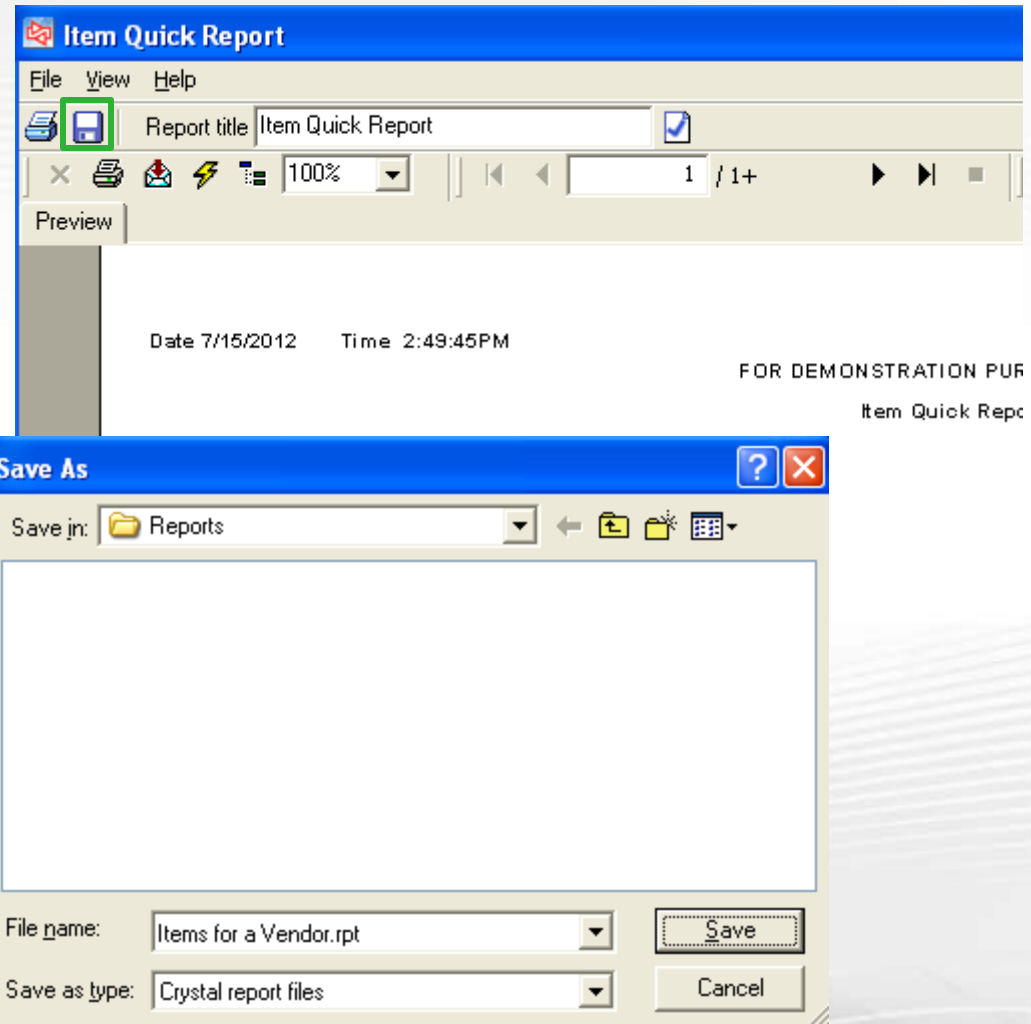
Item number	Description	Price-1	Item category	Sub-category	Attribute 1	Primary vendo
18HOLES	Green fee - 18 holes	36.00	GOLF	FEEES		
19HOLES	Green fee - 18 holes	36.00	GOLF	FEEES		
2PERSON	2 Person	75.00	GOLF	ACCES		
9HOLES	Greens fees - 9 holes	18.00	GOLF	FEEES		
ADM-SCD	Adams SC Driver, RH	399.99	GOLF	CLUBS	RIGHTHAND	ADAMS
ADM-TL2	Adams Tight Lies 2 Wood	349.99	GOLF	CLUBS	RIGHTHAND	ADAMS

# Save the Quick Report

Click  to save the Quick Report.

Change the filename from Item Quick Report to **Items for a Vendor**.

If asked, select to generate the data to save.



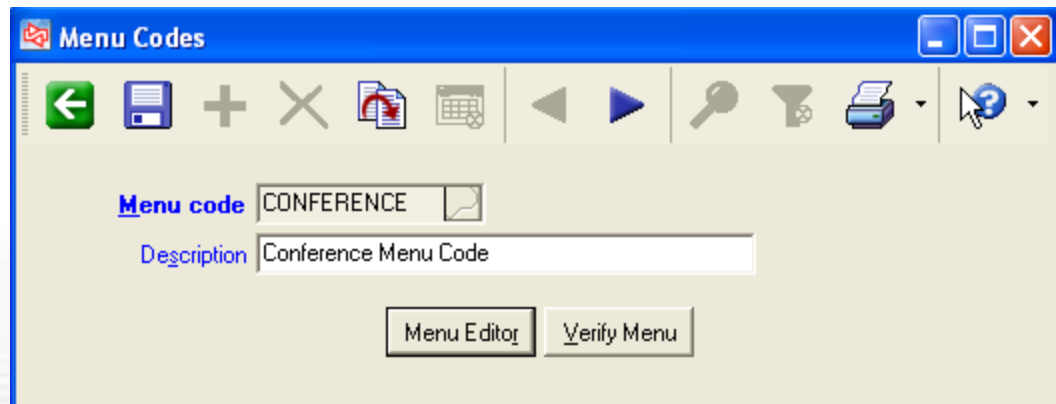
# Add a Menu Selection to Run the Report

We're done in the Items function. Now let's add the menu selection to run the report.

Select **Setup / System / Menu Codes.**

Add a new menu code named **CONFERENCE.**

Click  to edit the menu selections for the code.



The screenshot shows a software window titled "Menu Codes". The window has a blue title bar and a toolbar with various icons including a back arrow, save, add, delete, refresh, calendar, left arrow, right arrow, search, filter, printer, and help. Below the toolbar, there are two input fields: "Menu code" containing the text "CONFERENCE" and "Description" containing the text "Conference Menu Code". At the bottom of the window, there are two buttons: "Menu Editor" and "Verify Menu".

# Add a Menu Selection to Run the Report

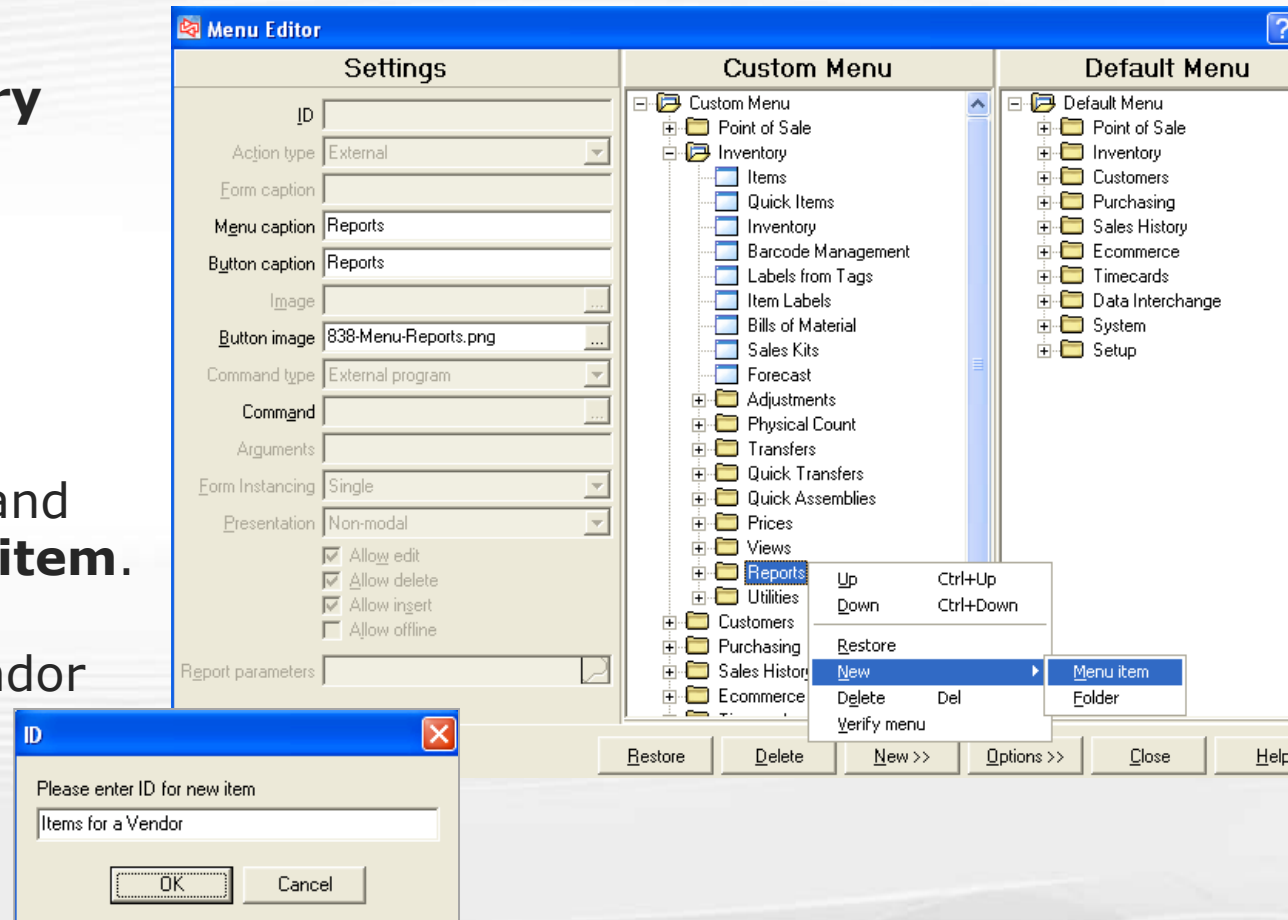
We'll add the report under the Inventory/Reports folder.

Expand the **Inventory** folder under the Custom Menu folder.

Then select the **Reports** folder.

Right-click **Reports** and select **New > Menu item**.

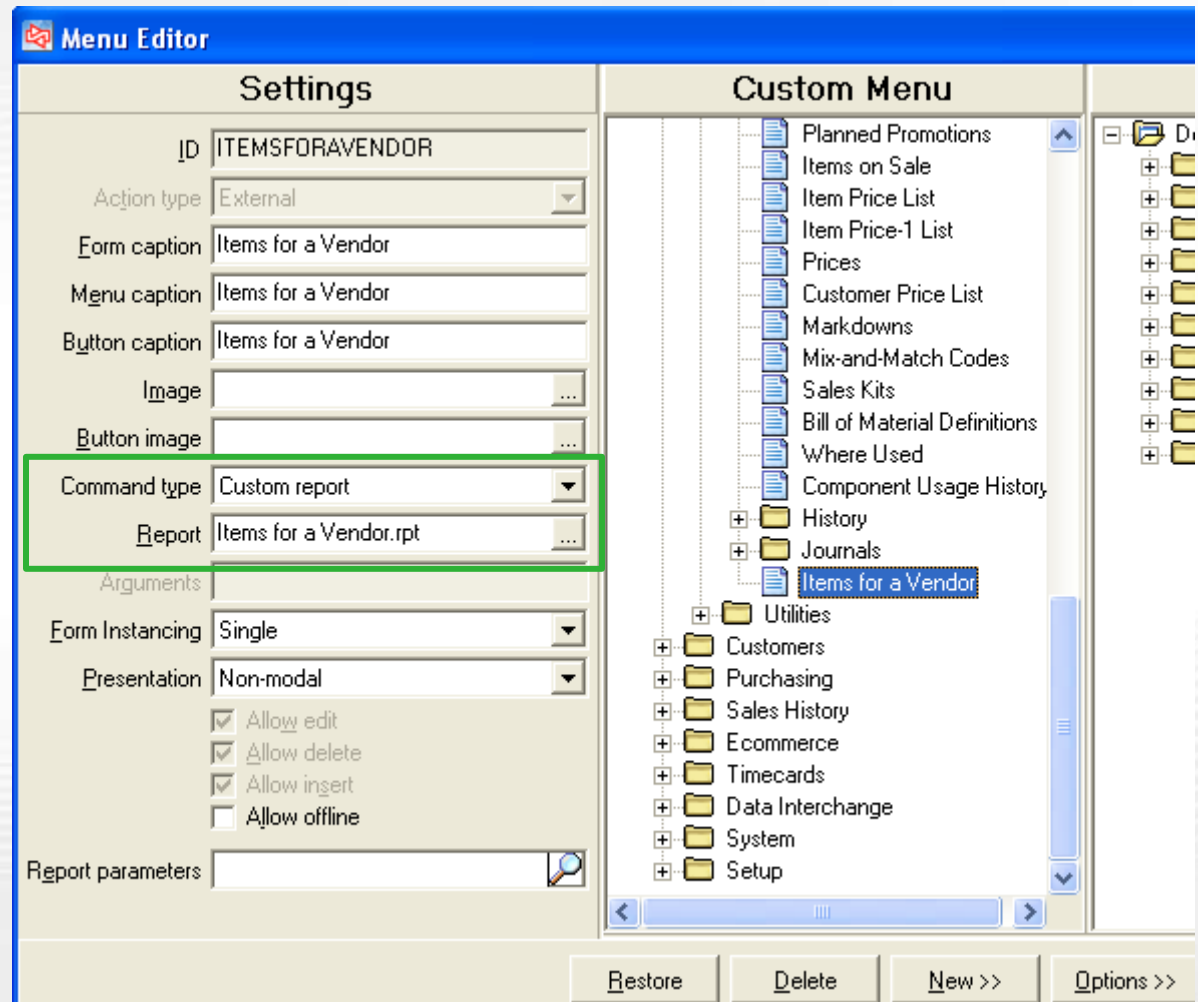
Enter Items for a Vendor as the ID of the new menu selection.



# Add a Menu Selection to Run the Report

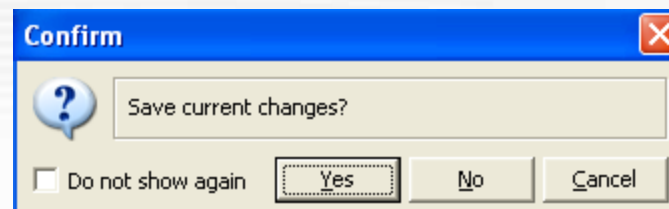
In the Settings panel, change Command type to **Custom Report**.

At Report, browse and select the **Items for a Vendor.rpt** file.

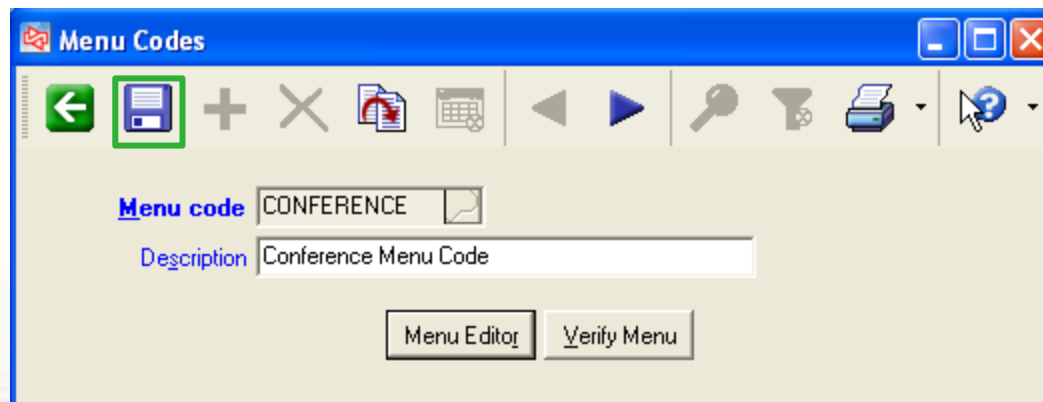


# Add a Menu Selection to Run the Report

Close the Menu Editor and select to save the changes.



Then save the menu code.



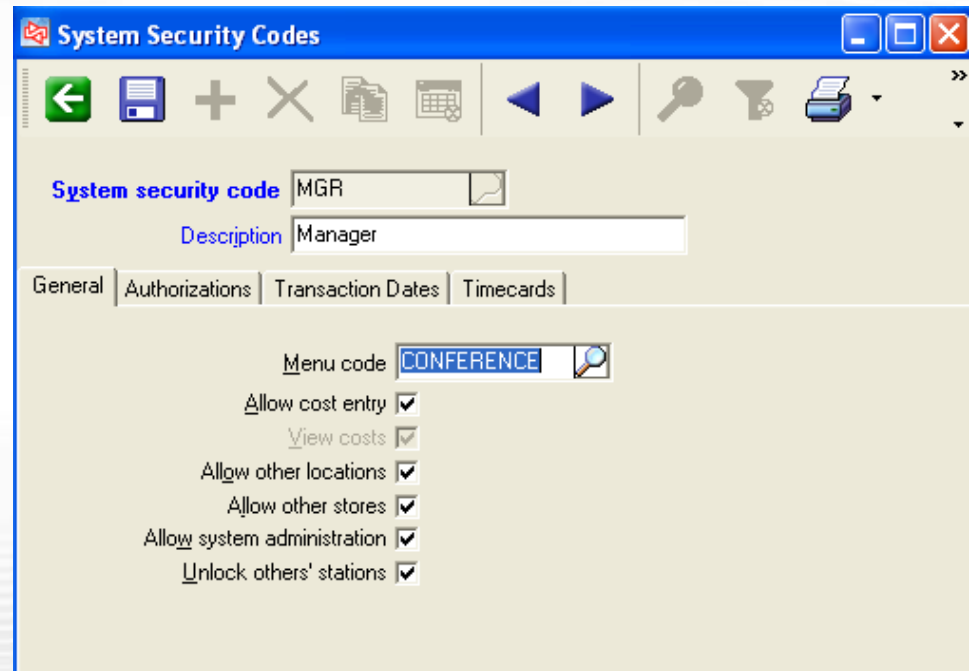
# Add the Menu Code to a Security Code

Add the Menu Code to the security code of users who need to run the report.

Select **Setup / System / Security Codes**.

Display the MGR security code and assign the CONFERENCE menu code.

Then save the security code.



The screenshot shows the 'System Security Codes' window. The 'System security code' field contains 'MGR' and the 'Description' field contains 'Manager'. The 'Menu code' field is set to 'CONFERENCE'. Below these fields, there are several checkboxes, all of which are checked: 'Allow cost entry', 'View costs', 'Allow other locations', 'Allow other stores', 'Allow system administration', and 'Unlock others' stations'. The window has a blue title bar and a toolbar with various icons.

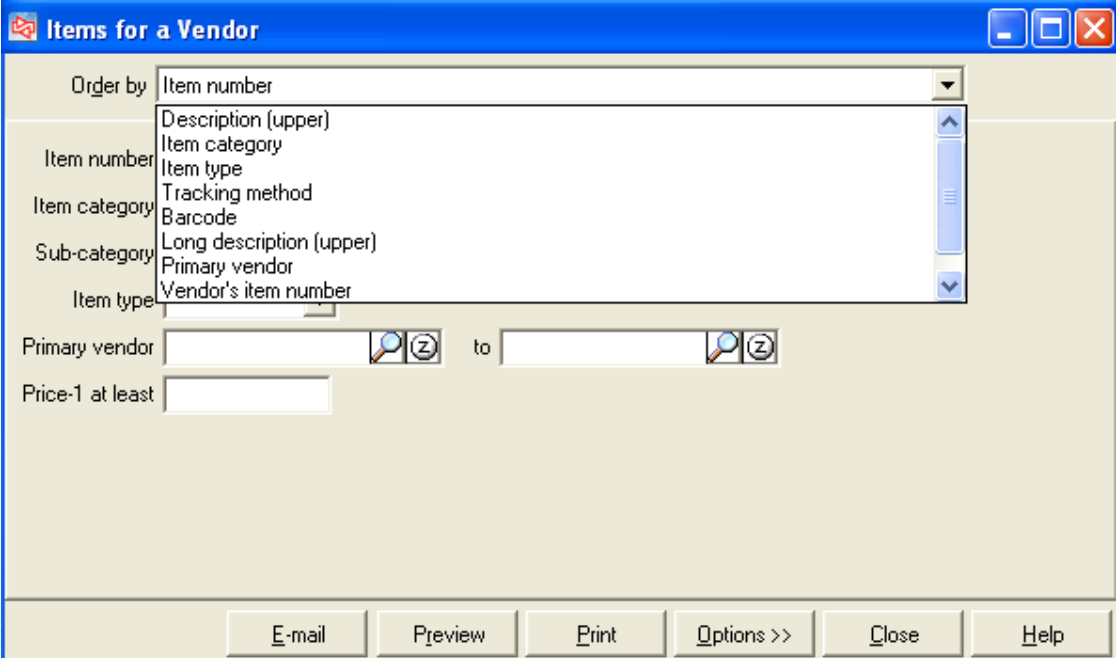


# Run the Report

Select **Inventory / Reports / Items for a Vendor** from the menu.

Select the order in which the report will print.

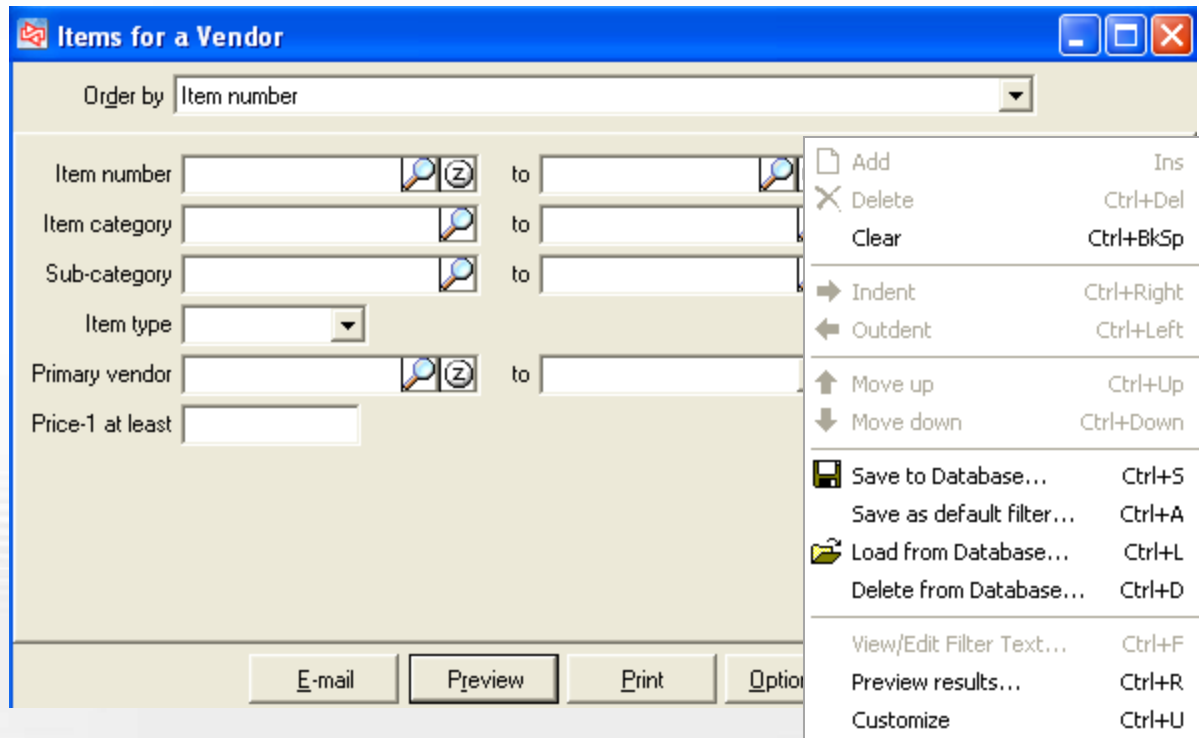
Filter the items that you want to include in the report.



The screenshot shows a software window titled "Items for a Vendor". It features a list of fields for filtering and ordering, including "Order by", "Item number", "Item category", "Sub-category", and "Item type". Below the list are input fields for "Primary vendor" (with search and zoom icons) and "Price-1 at least". At the bottom, there are buttons for "E-mail", "Preview", "Print", "Options >>", "Close", and "Help".

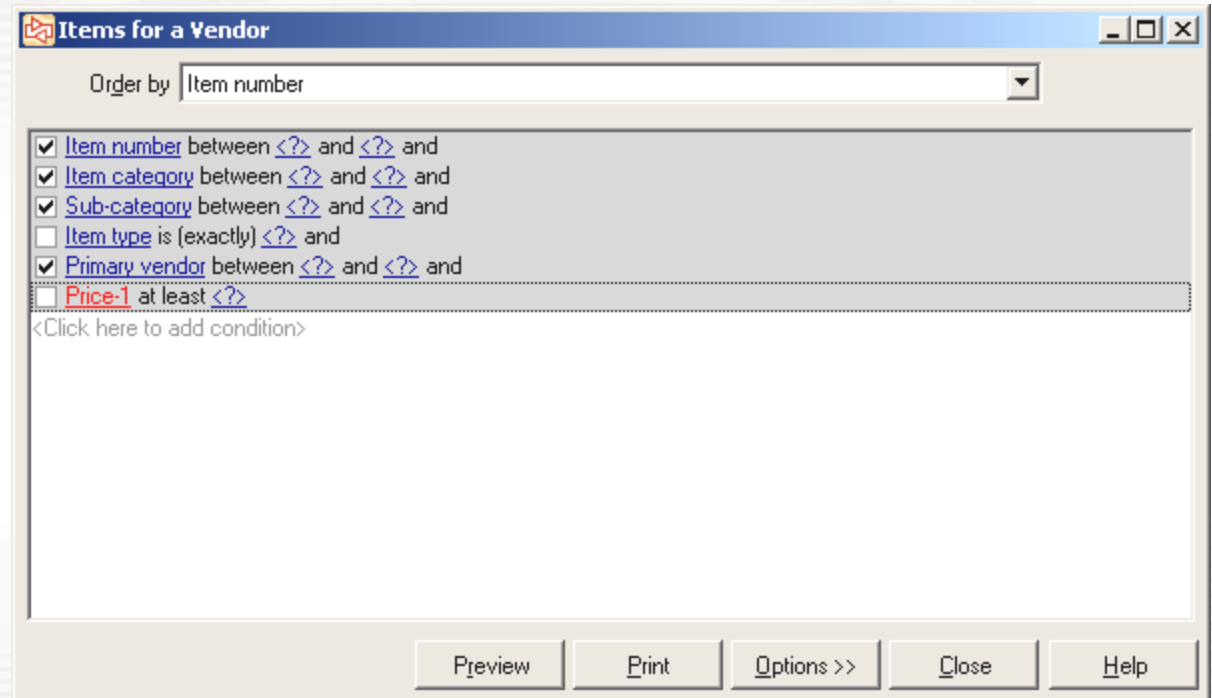
# Build a Default Filter

To build a default filter for this menu selection, right-click anywhere on the window and select **Customize**.



# Build a Default Filter

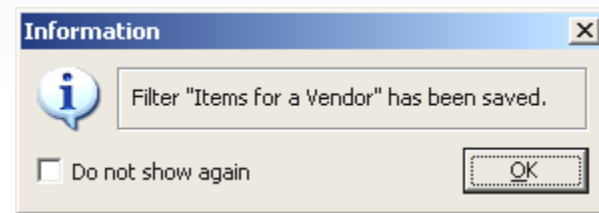
Clear the checkboxes for the **Item type** and **Price-1** filters, to de-activate them.



# Build a Default Filter

Right-click anywhere and select **Simplify** to see the new simplified filter.

Right-click anywhere and select **Save as default filter**.



Any time you select to print this report, the default filter will display.

# Use the Report

Select a primary vendor range of **Taylormade** to **Taylormade**.

Preview the report.

Items for a Vendor

Order by: Item number

Item number: [ ] to [ ]

Item category: [ ] to [ ]

Sub-category: [ ] to [ ]

Primary vendor: TAYLORMADE to TAYLORMADE

Buttons: Preview, Print, Options >>, Close, Help

# Use the Report

Items for a Vendor (Preview)

File View Help

100%

1 / 1

Preview

Date 7/15/2012 Time 5:18:15PM Page 1

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Item Quick Report

Order by Item number

Item: Primary vendor between TAYLORMADE and TAYLORMADE

Item #	Description	Item Pro 1	Category	Sub cat	Item attr 1	Vendor #
TAY-FSD	TaylorMade FireSole Driver	419.00	GOLF	CLUBS	RIGHTHAND	TAYLORMADI
TAY-FSI	TaylorMade FireSole Irons	789.00	GOLF	CLUBS	RIGHTHAND	TAYLORMADI
TAY-FSR	TaylorMade FireSole Rescue	119.00	GOLF	CLUBS	RIGHTHAND	TAYLORMADI
TAY-FSW	TaylorMade FireSole Woods	729.00	GOLF	CLUBS	RIGHTHAND	TAYLORMADI
TAY-NUP	TaylorMade Nubbins Putter	109.00	GOLF	CLUBS	RIGHTHAND	TAYLORMADI

5 record(s) printed.

-- End of report --