

# *Jacana User Guide*

Release 2.5, May 1999.

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## ▼ *Table of Contents*

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|   |                    |
|---|--------------------|
| <b><i>About this guide</i></b>                | <b><i>J-1</i></b>  |
| Who is this guide for? .....                  | J-1                |
| What it covers .....                          | J-1                |
| What it does not cover .....                  | J-1                |
| How to use this guide .....                   | J-2                |
| Conventions .....                             | J-3                |
| Need help? .....                              | J-3                |
| <b><i>Reporting fundamentals</i></b>          | <b><i>J-4</i></b>  |
| <b><i>What is Jacana?</i></b>                 | <b><i>J-8</i></b>  |
| Definitions .....                             | J-9                |
| <b><i>Preparing for installation</i></b>      | <b><i>J-11</i></b> |
| <b><i>Installing Jacana</i></b>               | <b><i>J-14</i></b> |
| <b><i>All about Jacana</i></b>                | <b><i>J-17</i></b> |
| The Jacana window .....                       | J-17               |
| Toolbars, buttons and menus .....             | J-20               |
| <b><i>Using Jacana - an introduction</i></b>  | <b><i>J-40</i></b> |
| Starting Jacana .....                         | J-40               |
| Exiting Jacana .....                          | J-45               |
| Your mouse .....                              | J-45               |
| <b><i>Using Jacana - Basic tasks</i></b>      | <b><i>J-49</i></b> |
| Getting results .....                         | J-49               |
| Creating a new report definition .....        | J-50               |
| Modifying an existing report definition ..... | J-54               |

|  |                     |
|--|---------------------|
| Saving your report definition.....                 | J-55                |
| Choosing the fields to use .....                   | J-57                |
| Adding fields into your report definition .....    | J-58                |
| Adding text to your report definition.....         | J-61                |
| Refining your report - contents .....              | J-62                |
| Refining your report - matrix columns .....        | J-82                |
| Refining your report - appearance.....             | J-89                |
| Printing your report definition layout.....        | J-99                |
| <b><i>Using Jacana - Advanced tasks</i></b>        | <b><i>J-101</i></b> |
| Using filters.....                                 | J-101               |
| Checking your data source.....                     | J-106               |
| Checking the field properties.....                 | J-108               |
| Checking the report properties .....               | J-111               |
| Changing your output settings.....                 | J-114               |
| Editing the run-time interface.....                | J-119               |
| Using report templates .....                       | J-121               |
| Changing your server .....                         | J-122               |
| <b><i>Trouble-shooting</i></b>                     | <b><i>J-123</i></b> |
| Messages from the server product.....              | J-123               |
| Other messages .....                               | J-124               |
| Version checking.....                              | J-126               |
| <b><i>Hands-on exercises</i></b>                   | <b><i>J-129</i></b> |
| <b><i>Appendix A: Technical specifications</i></b> | <b><i>J-184</i></b> |
| <b><i>Index</i></b>                                | <b><i>J-186</i></b> |

## ▼ *About this guide*

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### ▲ *Who is this guide for?*

This guide is for:

- ◆ new users
- ◆ experienced AS/400 users who want to access their reporting software via Microsoft Windows, and
- ◆ anyone wanting to use the ease of Windows, Win95 or WindowsNT to create reports from their AS/400 data.

Use this guide to get the best results from Jacana. It provides clear instructions on how to achieve the results you want.

### ▲ *What it covers*

This guide is designed to help you to learn how to use Jacana as quickly and as easily as possible. The guide focuses on the following tasks:

- ◆ installing Jacana
- ◆ setting up Jacana
- ◆ getting used to Jacana
- ◆ using Jacana to create new report definitions
- ◆ using Jacana to modify existing report definitions.
- ◆ learning how to use Jacana by doing the Hands-on exercises.

### ▲ *What it does not cover*

This guide does not provide details on how to use Microsoft Windows or your AS/400 reporting software. For details on these refer to the documentation that came with these products.

## ▲ *How to use this guide*

This guide is designed to help you use Jacana as quickly and as easily as possible. It provides clear instructions on how to achieve the results you want from Jacana. It has been designed so it can 'live' on your desk and always be at hand. This means you can quickly turn to the information you need without wasting any time.

This guide has several sections. These are:

*Reporting fundamentals* is an introduction to the basic concepts of reporting, the use of databases and Jacana.

*What is Jacana?* is an introduction to Jacana.

*Preparing for installation* covers administrative information for Jacana including system requirements and licensing of Jacana.

*Preparing for installation* covers how to install and setup Jacana on your PC.

*All about Jacana* covers the Jacana screen, the menus, toolbars and buttons you use in Jacana.

*Using Jacana - an introduction* provides detailed instructions on how to use Jacana. This section covers how to start and exit Jacana. It also covers the extra mouse functions in Jacana.

*Using Jacana - Basic tasks* provides detailed instructions on how to achieve the major tasks. This section covers creating and modifying report definitions, adding data to your report definitions and designing the report layout.

*Using Jacana - Advanced tasks* provides detailed instructions on how to perform advanced tasks. These include filtering data fields, changing output devices, changing the server and editing run-time interface text.

*Trouble-shooting* to help you solve problems you might have.

*Hands-on exercises* to help you learn more about Jacana.

The guide has a *Table of Contents* and an *Index*. Use these to find a topic or task you want information about.

## ▲ *Conventions*

These following conventions are used in this guide to identify special names or text:

**Bold type** indicates menu names, button names and function keys.

*Italic type* indicates titles of sections of the guide. It is also used to indicate text that you are to type (such as in the *Hands-on exercises*).

➡ **Tip:** indicates additional information or short-cuts that you might find useful.

√ Indicates actions you are to do.

✘ **Indicates warnings and special precautions.**

## ▲ *Need help?*

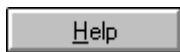
You can find information about Jacana either in this guide or by using the on-line help.

For information on how to use Microsoft Windows or your AS/400 reporting software refer to the documentation that came with these products or any on-line help that may be available.

### On-line help

Much of the information that appears in this book is also available as on-line help. You can use the on-line help by:

- ◆ choosing the **Help** menu from the menu bar
- ◆ clicking on the **Help** button on the toolbar and then clicking on the command, tool, screen region or item you want information about
- ◆ clicking on the **Help** button shown in certain dialog boxes
- ◆ pressing **F1**
- ◆ double-clicking on the status line.
- ◆ Click the **More About** button to show more information for a selected item, such as a report, data source or calculation function. **More About** information may be added locally or supplied with the server product.



## ▼ *Reporting fundamentals*

---

The essential ingredient for many businesses is information. They accumulate large quantities of data then extract the detailed information they require from this data.

### Databases

These large accumulations of data are normally stored on computers, structured into databases. What is a database? A database is a collection of related pieces of data. For example, an address book is a basic database, storing data about friends, colleagues, organizations, companies, etc.

| <i>Name</i>         | <i>Address</i>     | <i>City</i>        | <i>Zip</i> | <i>Phone</i>   | <i>Birthday</i> |
|---------------------|--------------------|--------------------|------------|----------------|-----------------|
| Andrew              | (H) 1 Connaught Rd | Madison Mills, Va. | 22953      | 223 9230       | 10 March, 1967  |
| Andrew              | (W) 32 Market St   | Arlington, Va.     | 22203      | 686 3245       |                 |
| CMS Inc.            | 56 Bridge Street   | Portland, Or.      | 97225      | (503) 203 6732 |                 |
| Darren<br>Edwards   | 24 Ash Street      | Winnipeg, Manitoba | R2Y 2K2    | (204) 888 5425 | 13 June, 1968   |
| Michael<br>Hanratty | 830 E. Cody        | Everett, Wa.       | 78203      |                | 23 August 1972  |

In database terms, each piece of data (address, city, phone, etc.) is a **field** and each associated set of fields is a **record**. The separate entries for (H)ome and (W)ork would be individual records, although they are for the same person. The complete address book, since all its records have similar data is a **file**. Copies of correspondence, Personal/Business, Received/Sent kept for reference, is another file familiar to everybody.

An address book is arranged to let you easily find the information that you need, providing you know the person's name. However, this sequence would be inconvenient if you wanted to know all the people with a birthday next month. In this case you would need to read every entry.

An address book is an example of a basic, single file database. Since many of the letters (records) in the correspondence files can be associated to a name/address in the address book, these files could be considered part of the same database.

## How data is stored on computers

Computers store data in files. Each database file consists of a collection of related fields arranged into a table structure, as illustrated in the address book earlier. Each **column** is a **field** - holding only one kind of information, e.g. zip code. Each **row** is a **record** - holding a set of directly related fields, e.g. name, address, birthday, etc.

Associated with every file there is a set of attributes identifying it and defining its contents.

## Attributes of a database file

- ◆ *Library identifier.* The disk space on a computer can contain vast numbers of files. The library is a means of grouping files allowing for easier location and retrieval.
- ◆ *File identifier.* Each file within a library is referenced with a unique identifier, e.g. DFB01.
- ◆ *File description.* Text that describes the data contained within a file, e.g. "Address information".
- ◆ *Fields.* Each file has one or more fields, e.g. an address file may include the fields such as:
  - » name
  - » line 1 of postal address
  - » line 2 of postal address
  - » zip code
- ◆ *Keys.* Key fields are the means of identifying records of data held on a file, e.g. name.

Each field in a file, like the file itself, has a set of attributes identifying it and defining its contents.

## Attributes of database fields

The attributes present might include such things as:

- ◆ *Descriptors*. For instance, Column Headings, Description and Labels.
- ◆ *Data type*. Describing the type of symbols or characters the field may hold.
  - » *Numeric* - the field can only contain numbers, e.g. a field *Quantity on Hand* may only hold a count of an item in stock.
  - » *Alphanumeric* - the field can contain any symbols (numbers, letters and special characters such as commas, etc.), e.g. an *Address* field may contain any numbers and letters.
- ◆ *Field size*. This indicates the number of characters the field can hold. The field will always be full of characters, e.g. a *Name* field could be 30 characters long, if you type "IBM" into such a field, the remaining character positions contain the invisible character *blank*.

## Data and information

Databases on computers may comprise hundreds, even thousands of files. Each file may have dozens or hundreds of fields, with some files involving thousands, often millions of records. This volume of data is unmanageable at an individual record level, unless there is some means of isolating from the mass of data the information that is required. Maybe this information is exceptions, e.g. overdue debtors, stock items requiring reorder, etc. At other times it may be summarized information that is needed, e.g. total sales of an item across all stores, the maximum, minimum and average daily sales for each store in a given week, etc. The means of transforming data into information is reporting.

## What is reporting?

Reporting is the means of isolating and presenting the information required from the data available. Using a reporting solution such as Jacana, you specify what data you need to produce a report containing only the important, meaningful information that you require. This process comprises some or all of the following steps.

- ◆ *Identifying the data source.* Which file(s) or set of files contain the required data?
- ◆ *Choosing the fields.* Which fields from these files need to be used for any reason in the report?
- ◆ *Selecting.* Which records of data are needed?
- ◆ *Sorting.* If the records are not sorted (or sequenced) into the order that you require they may be presented in an order of little meaning or use to you. Also, sorting may be required for creating totals.
- ◆ *Totaling.* Combining data from several records into a single value by means of totals, counts, averages, etc.
- ◆ *Designing the layout.* Organizing the data for presentation.
- ◆ *Calculating.* Sometimes the raw data in the files needs transforming to be presented as information in your report.

## ▼ *What is Jacana?*

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Jacana is a Windows-based program that allows you to create and modify AS/400 reports from your PC. It acts as a client to AS/400 server products such as OPEN/DB, Info WorkPlace, MIDAS/Q and SYNON/RW.

Using Jacana you can:

- ◆ design new report definitions
- ◆ modify existing report definitions
- ◆ store your report definitions locally (on your PC) for future use.

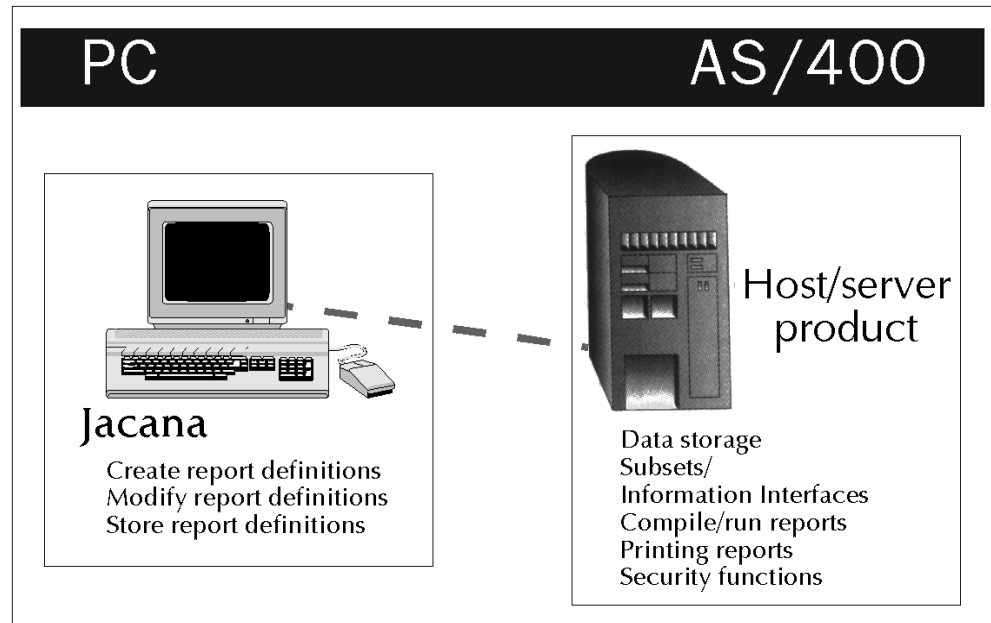
You can rapidly create a new report definition from scratch, or base it on an existing one. ReportWizards can help you create a report definition quickly and easily.

You do not need specialized knowledge of the database, its structure, files or keys. You do not need technical knowledge to perform complex data manipulation. Jacana has tools to perform many functions including totals, subtotals, averages and other data manipulation actions for your reports.

Jacana gives you full access to your AS/400 server product's reporting capabilities from your PC. This gives you the power, security and sophistication of your AS/400 and its software, combined with the ease-of-use of the Windows environment allowing you to easily create and modify report definitions, while retaining the benefits of the AS/400 where the reports are actually run. This ensures:

- ◆ file linking and joins are correct
- ◆ users cannot create superfluous and resource-hungry logical views
- ◆ accurate automatic measuring of report times, usage and report definitions
- ◆ optimized performance of compiled programs
- ◆ no reliance on ODBC drivers or SQL
- ◆ large volumes of data can be rapidly processed, and
- ◆ systems resources are fully managed.

The diagram below shows what happens on each computer.



Jacana enables you to use the data on your AS/400. The quality of this data and the quality of the information interface are crucial to how much you can get out of Jacana.

- ✘ **Some of the sophisticated report layouts created or modified using Jacana may contain features that cannot be replicated on a server product “green screen”. If the “green screen” Quick function is used to attempt a report redesign, a warning is displayed. This warning says that the existing layout will be changed. The warning has an option to allow you to abandon the layout redesign. Using a server “green screen”, it may not be possible to exactly recreate a layout designed using Jacana.**

## ▲ *Definitions*

There are a few terms used in this guide that you should know about.

### Data source

The term ‘data source’ refers to the server (AS/400) database file or subset you are using. The data source is defined on the server, but a copy may be saved locally (on your PC).

### Parameter

The term 'parameter' refers to a constant value supplied by the user who initiates a report run. It is defined within the Report Specifications and can be used in various ways (e.g., calculations, conditions). It can also be printed anywhere in the report layout.

### Picking list/Working list

The term 'picking list' refers to the list of available fields from the data source.

The term 'working list' refers to the list of fields currently used in the report definition. A working list is made up of the fields used in any part of the report definition. These can be fields used in specifications, fields dragged into the report and fields that you chose from the picking list by using the checkbox.

You can choose which list is shown in the DataCrafter.

### Properties

The term 'properties' refers to the attributes or settings of an item in Jacana. You can set properties for:

- ◆ individual fields (field properties)
- ◆ individual lines in a report layout (line properties)
- ◆ a report section (sheet properties), and
- ◆ the entire report (report properties).

### Report

The term 'report' refers not only to printed output - it also applies to output designed for workstations or file output. You can choose the output medium you require and tailor your report for that medium.

### Sheet

Jacana supports multi-sheet reports. A report sheet determines the overall look of a section of a report or output. For example, a report could have a detail sheet and a summary sheet.

### Subset

The term 'subset' refers to a portion of the server database that you can access. A subset is defined in the server product.

## ▼ *Preparing for installation*

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This section contains information on how to prepare for Jacana installs, including:

- ◆ What steps to do on the server product
- ◆ Preparing Jacana installation diskettes.

### ▼ *On the server product*

- ◆ When you INSTALL or UPGRADE the server product on the AS/400 make sure you choose to restore client install objects. Part of this step includes creating an AS/400 folder. The default name for this folder is /QDLS/<product>/INSTALL, with sub-folders for JACANA, and VALET.
- ◆ Ensure that your users are authorized to the AS/400 folders in the above step. A default install will grant \*PUBLIC access to these folders.
- ◆ Ensure the server product has the Common product library set (See Client information option in the Global Settings function on the server product).
- ◆ License the server product for Jacana.

### ▼ *Licensing Jacana*

Jacana can be installed on PCs not connected to a compatible AS/400 server product, for demonstration, education or similar purposes. In such cases Jacana is fully functional but cannot receive from or save to the server product. Any attempt to communicate with an unlicensed server product will be unsuccessful and an appropriate message will be shown.

For Jacana to operate with your AS/400 server product there must be a valid Jacana license in the target AS/400 product. This license will allow Jacana, installed on any number of PCs connected to that AS/400, to operate in client/server mode. In this mode it will make full use of the controlled environment and data that the server product makes available.

Any licensed Jacana installation can, in the course of a client/server session, have required data source information downloaded to it from the server product. This copy of the data source can be saved locally on the PC. Later, when not connected to the server, this local copy can be used to develop report definitions. Of course, the report definitions must be transferred to the same server product library before they can be used to generate output.

To apply a Jacana license to the AS/400 server product, use the \$SLICENSE command in that product.


## ▼ *Communications*

Jacana communicates with the server product via either

- ◆ APPC
- ◆ CPI-C
- ◆ TCP/IP.

The APPC and CPI-C options require Client Access/400 to be installed on both the AS/400 and each PC workstation.

When using TCP/IP, make sure:

- ◆ You set up AS/400 connections using menu item **L Connect** from the **Jacana** menu. 
- ◆ The TCP/IP monitor is started on the server product before starting Jacana (see *Client/Server contents and installation* guide).

In any option, make sure:

- ◆ that the necessary hardware network connections (e.g. twinax, Ethernet) exist between the AS/400 and the PC workstations, and
- ◆ The appropriate network options are configured on the PC workstations.

## ▼ *System requirements*

Jacana requires the following hardware and software resources.

### PC hardware

At a minimum, your PC should have:

- ◆ a 486 processor
- ◆ 16 MB of RAM
- ◆ 8 MB of free hard disk space for the Jacana software
- ◆ additional hard disk space is required for saving report definitions on your PC
- ◆ A communication adapter connecting your PC to your AS/400. For example, Twinax, Ethernet or Token Ring connection under the Client Access router.

### PC software

- ◆ Microsoft Windows NT or
- ◆ Microsoft Windows 95
- ◆ Microsoft Windows 98.

If using APPC or CPIC communications protocol, you will also need:

- ◆ Client Access Version 3 or later.

### AS/400 software

- ◆ OS/400 V3R1M0 or later.
- ◆ Server product internal level 070 or later.  
Note: To check the internal level number on your server product, choose the **Global Settings** menu option and read the release/level number on the screen.

## ▲ *Installing Jacana*

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Installing Jacana is an easy process that takes approximately five minutes.

Installing using a mapped network folder

To install Jacana:

- √ Check that you have no other applications running.
- √ Using Explorer, map a network drive to the AS/400 folder for installing Jacana. By default this is  
\\<AS400>\qdl\<product>\install\jacana  
where:  
<AS400> is the name of your AS/400, and  
<product> is the name you specified when you installed the client install objects on the server product.

✘ **The InstallShield will not work with Client Access/400 shared folders unless you use the map network drive facility.**

➡ Your administrator may have created an install set on a PC network server.

- √ Open the folder *Disk1*.
- √ Double click on the file *setup.exe*. The Jacana setup program starts.
- √ Follow the instruction in the setup wizard.

When you have finished installing Jacana you will see that your Window's **Start** menu has been modified. You will see:

- ◆ A new menu item has been added to the **Programs** menu.
- ◆ **Jacana** has been added to the new menu item.
- ◆ Items have been added to the **Jacana** menu. The items added will depend on the choices made in the setup wizard.

Installing using diskettes

To install Jacana:

- √ Check that you have no other applications running.

- √ Insert the *Jacana Installation Disk 1* into your floppy disk drive, usually drive A.
- √ Choose **Run** from the **Start** menu.
- √ Type *a:\setup* in the dialog box and click **OK**. The Jacana setup program starts.
- √ Follow the instruction in the setup wizard.

When you have finished installing Jacana you will see that your Window's **Start** menu has been modified. You will see:

- ◆ A new menu item has been added to the **Programs** menu.
- ◆ **Jacana** has been added to the new menu item.
- ◆ Items have been added to the **Jacana** menu. The items added will depend on the choices made in the setup wizard.

## Setup types

Jacana offers alternate setup types. By not installing certain components, you can save disk space. If you are not sure which option to use, choose *Typical*.

### Typical

This option will install:

- ◆ Jacana
- ◆ Jacana on-line help
- ◆ Support for TCP/IP connections
- ◆ Jacana exercises.

### Compact

This option will install:

- ◆ Jacana.

### Custom

This option will allow you to install Jacana and optionally:

- ◆ Jacana on-line help
- ◆ Support for TCP/IP connections

- ◆ Jacana exercises
- ◆ Jacana Administrator
- ◆ Jacana Administrator on-line help.

When this option is selected, the default is for a complete installation.

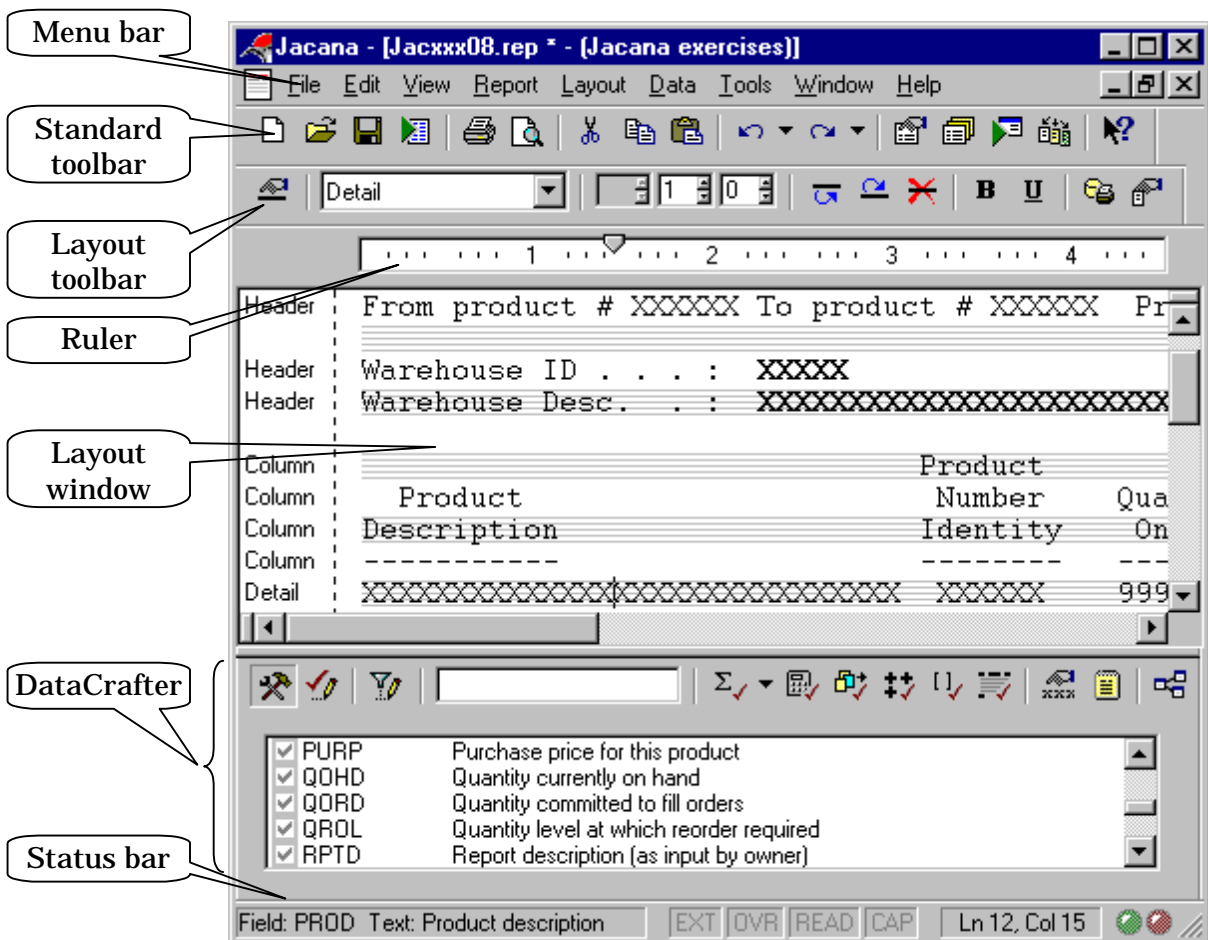
## ▼ All about Jacana

This section describes the Jacana screen, menus, toolbars and buttons.

### ▲ The Jacana window

Jacana is a Windows-based product. This means it works in much the same way as all your other Windows programs. You can choose functions or tools by using either the buttons on the toolbars or by choosing from the menus.

The following illustration identifies each part of the Jacana window.



## Layout window

Jacana shows your report definition in the layout window. Use the layout toolbar and/or the menu options to refine the layout of your report. Add fields to your report definition simply by dragging them from the DataCrafter into the report layout.

Use the scroll bars to move around the report definition. Alternatively, use the arrow keys to move the cursor in the report definition.

Jacana lets you have multiple report definitions open at any one time.

You can arrange your report definition layouts in various ways. They can be cascaded down the layout window or tiled across it. A report layout can also be split, both horizontally and vertically. Report layouts can also be minimized as icons in the layout window.

## The DataCrafter

The DataCrafter allows you to filter, select and view your fields. Along the top of the DataCrafter is the data toolbar. This has buttons that let you select which field list is shown, filter the fields and view the properties and source of any field.

To add fields to your report definition simply drag them from the DataCrafter into the report layout.

In the lower portion of the DataCrafter the fields available in your current data source are shown, being either the working list of fields or the picking list. The picking list can show all the fields in the data source and is the list of fields you can pick to use, the working list shows the fields currently used in the report definition. Use the toolbar to choose which field list is shown.

For each field listed there is a checkbox, the field name and a description of the field. The checkbox indicates if this field is already being used in the report definition.

You can change the size of the DataCrafter. Move the cursor over the top edge of the DataCrafter, the cursor changes to a double-headed arrow. Click and drag to re-size the DataCrafter.

You can also move the DataCrafter around your screen. Simply click on the border and drag it into the new position. In fact by using the **Toolbars** option from the **View** menu you can turn the DataCrafter off and on.

## Status bar

Jacana's status bar along the bottom of the window lets you know what is happening. Jacana displays messages, for instance what the particular toolbar button does, and a progress bar for longer tasks. The status bar may show other information, according to user options, which include:

- ◆ if you have chosen to overwrite, i.e. what you type replaces the information shown in the report definition
- ◆ if you are viewing a read-only file
- ◆ communications status.

Some indicators shown in the status bar may be toggled on or off by double-clicking with the mouse. For example

- ◆ overwrite
- ◆ read only
- ◆ caps lock
- ◆ number lock

The last two numbers on the status bar are the current coordinates of the insertion point. They show what line and character the insertion point is at in the report definition shown in the layout window.

To turn off the status bar use the **Status bar** option from the **View** menu.

## Ruler

You can have a ruler shown along the top of your layout window. The ruler measures the number of characters across the report. The marker in the ruler bar shows where the cursor is in the current line of the report. You can use this marker to help align items in your layout. If you click on the ruler it shows a vertical line down the layout window, this can also help you to align things in your report layout.

To turn the ruler on or off, choose the **Ruler** option from the **View** menu.

## ▲ *Toolbars, buttons and menus*

Jacana gives you several ways to choose commands. You can select the options you want from the menus, use the shortcut menus or click toolbar buttons with the mouse. Jacana has four toolbars:

- ◆ standard toolbar
- ◆ layout toolbar
- ◆ data toolbar, and
- ◆ sheet toolbar.

The standard toolbar is always available and is usually shown at the top of the Jacana window. The layout and data toolbars are available when you are using report layout and the DataCrafter respectively. The layout toolbar changes depending on whether you are using the page layout view or the record layout view. The sheet toolbar is not shown by default, but may be useful when using multi-sheet reports. All Jacana toolbar commands are also available from the menus.

## Standard toolbar



This toolbar lets you perform the most common functions with a single click of the mouse. Just click on the button to do the following actions.

Create a new report definition.



Open an existing report definition.



Save the active report definition.



Run the active report definition. This option is only available if Valet is installed on your computer.



Print the active report definition.



Preview how the report definition would appear on your printer.



Cut selection from Layout to clipboard.



Copy selection from Layout to clipboard.



Paste selection from clipboard to Layout.



Undo report changes.



Redo undone actions.



See the properties of the active report definition.



See the specifications for the active report definition.



See the run-time interface text. This is the text displayed on the AS/400 asking for select/omit and parameter values at run-time.



See list of sheets for the report.



Get context-sensitive help about using Jacana. This is help about the item you then click on.



## Layout toolbar (Page view)



This toolbar lets you perform the major layout functions with a single mouse click. It shows the status of the current line in the report layout and allows you to change the characteristics of this line.

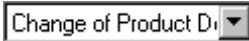


See the attributes of the current line.

Blank lines shown in the layout may have no line type. These are spacing lines shown when the **View Image** option from the **Image** menu has the **Show line spacing** option checked.

If the current line is a blank space line you can convert it into an empty print line.

Empty lines are not printed when the report is run.



Choose and change a line type for the current line.



Set the page line number that this report line is printed on.



Set how many blank spacing lines there are before the current line.



Set how many blank spacing lines there are after the current line



Insert an empty line after the current line, of the same line type.



Insert an empty line before the current line, of the same line type.



Delete the current line.



Toggle the bold attribute on or off for the current field or line (field if cursor is in field, otherwise line).



Toggle the underline attribute on or off for the current field or line (field if cursor is in field, otherwise line).

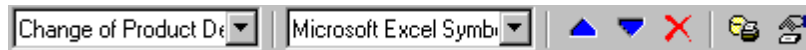


See the output settings.



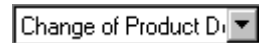
See the properties and output settings for the current layout sheet.

## Layout toolbar (Record view)

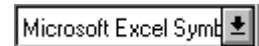


This toolbar lets you perform the major record layout functions with a single mouse click.

Choose if detailed or summarized data will be output.



Choose how the report output should be formatted for use by PC-based applications.



Move the current field up the list of chosen output fields.



Move the current field down the list of chosen output fields.



Delete the current field from the list of chosen output fields.



Set the output settings.



See the properties and output settings for the current layout sheet.



## Sheet toolbar

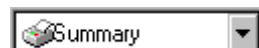


This toolbar is useful when working with multi-sheet reports.

Add a new sheet to the report.



Choose which report sheet to display.



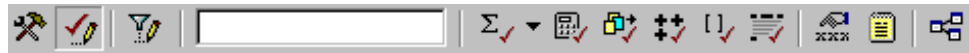
Toggle the null report sheet setting. If this button is down, this sheet will be output if no data chosen when the report runs.



Delete the current sheet.



## Data toolbar



The data toolbar is part of the DataCrafter. This toolbar lets you work with the available lists of fields with a single mouse click. Just click on the button to do the following actions.



See the working list of fields.



See the picking list of fields.



Define the criteria for filtering fields into the picking list.



Pick fields containing specified string. This is a shortcut to the long text option of the filter picking list dialog.



See only the summary fields in the DataCrafter.



See summary fields by type and/or sort level.



See only the calculated fields in the DataCrafter.



See only the fields used for selections in the DataCrafter.



See only the fields used for matrix columns in the DataCrafter.



See only the parameters in the DataCrafter.



See only standard fields in the DataCrafter. Standard fields are common to all data sources and include fields such as page number and report name.



See the properties of the field highlighted in the DataCrafter.



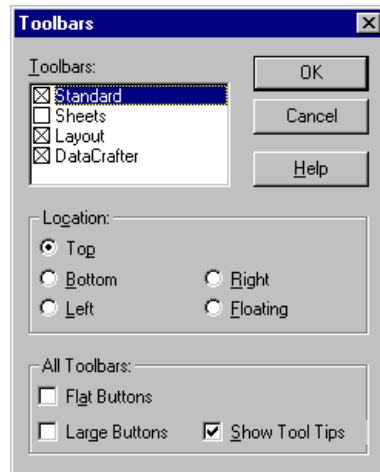
See more about the field highlighted in the DataCrafter.



See the source of the data for the report.

## Choosing and locating toolbars

You can decide which toolbars are shown and where they appear. Move the cursor to any toolbar and click the **right** mouse button or choose **Toolbars** from the **View** menu, Jacana shows the Toolbars dialog box.



Use this dialog box to:

- ◆ choose which toolbars to see,
- ◆ where toolbars appear,
- ◆ the appearance of the buttons on the toolbars, and
- ◆ decide if Tool Tips are to be shown.

To change the location of a toolbar:

- √ Select the toolbar in the toolbar list
- √ Click on a location option.
- ➔ You can also move a toolbar to any location by simply clicking on it and dragging it to the new location.

## Menus

Jacana commands are grouped on menus. Each menu contains a group of related commands. The menus available are:

- ◆ File
- ◆ Edit
- ◆ View
- ◆ Report
- ◆ Layout
- ◆ Data
- ◆ Tools
- ◆ Window, and
- ◆ Help.

Each of these menus lists commands or functions related to that area. For example, the **File** menu has commands to open, create, save and print your report definitions.

### File menu



This menu allows you to do the major file actions, e.g. opening, saving and printing your report definitions. Select the option you require to perform the following functions.

|                         |  |
|-------------------------|--|
| <b>New</b>              | Create a new report definition.  |
| <b>Open</b>             | Open an existing report definition.  |
| <b>Server</b>           | Choose a new AS/400 server to connect to. You can choose the system and library you want to use.<br>Note. This option is only shown when no report definitions are open. |
| <b>Close</b>            | Close the active report definition.<br>If you have any unsaved changes, Jacana asks if you want to save them.  |
| <b>Save</b>             | Save the active report definition.   |
| <b>Save As</b>          | Save the active report definition with a new name.<br>This leaves the existing report as it was.   |
| <b>Run</b>              | Run the current report. This option is only available if Valet is installed on your computer.  |
| <b>Diagnostics</b>      | Display errors or warnings that may prevent the report from running correctly.   |
| <b>Print</b>            | Print the report definition.   |
| <b>Print preview</b>    | See how the report definition would appear on your printer.  |
| <b>Print setup</b>      | Setup your printer.<br>This is for your Windows printer to print the report definition, not your AS/400's printer.   |
| <b>(Recent reports)</b> | Jacana lists the names of the last few report definitions you have used. Choose one to re-open that report definition.   |
| <b>Exit</b>             | Exit from Jacana.<br>If you have any unsaved changes, Jacana asks if you want to save them.  |

## Edit menu

|                           |          |
|---------------------------|----------|
| <u>U</u> ndo Delete       | Ctrl+Z   |
| <u>R</u> edo Delete       | Ctrl+Y   |
| <hr/>                     |          |
| C <u>u</u> t              | Ctrl+X   |
| <u>C</u> opy              | Ctrl+C   |
| <u>P</u> aste             | Ctrl+V   |
| Paste Special             | ▶        |
| <hr/>                     |          |
| Select <u>A</u> ll        | Ctrl+A   |
| Select <u>L</u> ine       |          |
| Select <u>W</u> ord       | Shift+F8 |
| Select <u>C</u> olumn     |          |
| E <u>x</u> tend Selection | F8       |
| <hr/>                     |          |
| <u>O</u> vertype          | Ins      |
| Read Only                 |          |
| <hr/>                     |          |
| Empty Undo <u>B</u> uffer |          |

This menu allows you to do some editing functions, e.g. switching between overtyping and insert modes. Select the option you require to perform the following functions.

- Undo** Use this option to reverse the last change to the report.
- Redo** Use this option to re-apply an undone action.
- Cut** Use this option to remove parts of Layout. The removed parts may then be used for a Paste operation.
- Copy** Use this option to copy parts of Layout for a Paste operation.
- Paste** Use this option to insert cut or copied parts of layout using the default mode, i.e.:
- Paste Insert Lines** if whole lines were cut or copied, or
- Paste tracker** or **Paste immediate** depending on your preferences set in **Options**
- Paste Special** Use these options to insert cut or copied parts of layout in one of three ways:
- Paste tracker:** The data is pasted using a two-stage procedure. First move the insertion point with the mouse or keyboard. Jacana shows an outline of where the data will be pasted. When

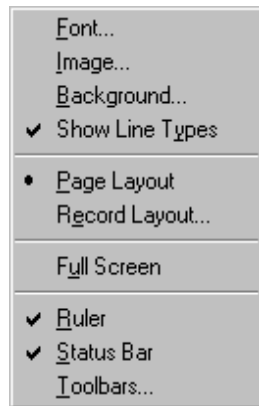
satisfied, either click with the mouse or press the Enter key to complete the paste. Press escape to avoid completing the operation.

**Paste immediate:** The data is pasted at the insertion point. This method is more conventional, but does not provide the visual feedback of the tracker option.

**Paste Insert Lines:** The data is pasted on new lines inserted before the insertion point.

- |                          |   |
|--------------------------|---|
| <b>Select All</b>        | Use this option to select all lines in the layout.  |
| <b>Select Line</b>       | Use this option to select the line indicated by the insertion point.  |
| <b>Select Word</b>       | Use this option to select the word or field indicated by the insertion point.   |
| <b>Select Column</b>     | Use this option to select the column (field plus headings) indicated by the insertion point.  |
| <b>Extend Selection</b>  | Use this option to toggle extended selection mode.  |
| <b>Overtyp</b>           | Use this option to toggle between over-typing and text insertion in your report layout. Over-typing means anything you type will type over the existing material. Inserting text means your typing is added to the report layout at the current cursor location or insertion point.   |
| <b>Read only</b>         | Use this option to toggle the read-only restriction on or off for this file. This is intended as a warning only.<br>The read-only 'flag' is set 'on' when you download a report from the AS/400 and you do not have the authority to change it. However, you can change the read only setting (by using this menu option or double-clicking on the indicator on the status bar) and then save the report either to a different AS/400 or by using the Save As option from the <b>File</b> menu. |
| <b>Empty Undo Buffer</b> | This option will clear the empty undo buffer. It may be used to reduce the size reports before they are saved.  |

## View menu



This menu allows you to set how Jacana looks on your screen. You can specify the font used, whether the ruler, status bar and toolbars are shown and how. Select the option you require to perform the following functions. This menu changes, depending on whether you are in page layout or record layout.

### **Font**

Choose or change the font for your report definition to appear in Jacana.  
Note, this is not the font in the actual report created when you run the report on your AS/400. It is the font Jacana uses for this report definition. You cannot currently use Jacana to change the font used on your AS/400.

### **Image**

Set how the report layout appears. Jacana displays a dialog box in which you can choose the number of report detail lines shown in the layout window and whether line spacing and page breaks are shown.

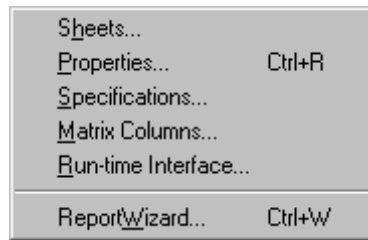
### **Background**

Choose or change the background of the layout window. Setting the background makes it easier to distinguish layout lines.

- Line types**      **Show:** Toggles on or off showing line types in the margin of the layout window.
- Small:** Toggles on showing line types and sets the size of the margin to small. When showing a small margin, only a one or two letter abbreviation is used for each line type, e.g. H=Page header, S1=first sort break.
- Medium:** Toggles on showing line types and sets the size of the margin to medium. When showing a medium margin, a single word will be used for the line type, e.g. Header=Page header, Sort(1)=first sort break.
- Large:** Toggles on showing line types and sets the size of the margin to large. When showing large margins the full line type description is shown, and sort lines show the name of the sort field (Change of ...).
- Columns**              Set how the columns of the record layout are displayed. Jacana displays a dialog box in which you can choose which columns are displayed and what order they are displayed.
- Page Layout**        Display the layout view allowing you to work with multiple lines.  
Note: This will convert the report layout, re-designing for output to printer, workstation or disk with unstructured record formats. The existing design of the report sheet will be lost.
- Record Layout**     Display the layout view allowing you to work with a single line.  
Note: This will convert the report layout, re-designing for output to disk with a structured record format. The existing design of the report sheet will be lost.
- Full screen**         Toggle full screen mode. Full screen mode enlarges the layout window to cover the entire screen. The full screen allows you to see more of the report layout without scrolling.  
NOTE: Although the menu is not shown in full screen mode, all menu options are available via the keyboard shortcuts. E.g. **Alt + F** shows the file menu.

|                   |   |
|-------------------|---|
| <b>Ruler</b>      | Toggle the ruler on or off.   |
| <b>Status bar</b> | Toggle the status bar on or off.                                      |
| <b>Toolbars</b>   | Choose which toolbars are shown and where and how they are displayed. |

#### Report menu



This menu gives you access to the commands that affect the whole report. These include report sheet properties, the report properties (appearance) and the major report specifications (content specifications). You can also select the ReportWizard to help you to quickly create a report based on your requirements. Select the option you require to perform the following functions.

|                           |   |
|---------------------------|---|
| <b>Sheets</b>             | See and/or change the report sheets. You can attach different banner and control pages and specify output settings.   |
| <b>Properties</b>         | See and/or change the properties for the report. These include the report name, execution modes, run-time statistics, data and AS/400 information about the report.   |
| <b>Specifications</b>     | See and/or change the specifications for the report. Use the Specifications dialog box to access the field specifications for the report. This includes workfields, summary fields, page skips, run-time selections and parameters. |
| <b>Matrix Columns</b>     | See and/or change the matrix column specifications for the report.  |
| <b>Run-time Interface</b> | See and/or change the run-time interface text. This is the text displayed when the report is run asking for select/omit and parameter values.   |
| <b>ReportWizard</b>       | Use this option to choose the ReportWizard to use for this report definition.   |

### Layout menu (Page view)

|                                     |              |
|-------------------------------------|--------------|
| <u>B</u> old                        | Ctrl+B       |
| <u>U</u> nderline                   | Ctrl+U       |
| <u>I</u> nsert Field...             | &            |
| <u>C</u> hange Field...             |              |
| <u>F</u> ormat Field...             | Ctrl+Shift+F |
| Field <u>P</u> roperties...         | Ctrl+F       |
| <u>I</u> nsert Line                 | ▶            |
| <u>D</u> elete Line                 | Ctrl+Del     |
| <u>L</u> ine Properties...          | Ctrl+L       |
| Re <u>s</u> equene Lines            | Ctrl+Q       |
| Output <u>S</u> etup...             |              |
| <u>S</u> heet Properties...         | Ctrl+H       |
| Layout <u>W</u> izard...            | Ctrl+Shift+W |
| <u>C</u> onvert to Record Layout... |              |

This menu allows you to work on the layout of your report definition, e.g. you can insert fields, change the appearance of the current field or line, select the line type, insert or delete lines. Select the option you require to perform the following functions.

A number of these options apply to either the current field or line in the report layout. If the cursor is in a field, the option applies only to that field. If the cursor is in a line but not in a field, the option applies to the entire line.

**Bold** Toggle the bold attribute on or off for the current field or line (field if cursor is in field, otherwise line).

**Underline** Toggle the underline attribute on or off for the current field or line (field if cursor is in field, otherwise line).

**Insert field** Insert a field into the layout. Jacana shows a pop-up box. Enter the first characters of the field you want. Press space or **Enter** to accept the field or press **Esc** to cancel.

**Change field** Change (replace) the current field in the report layout. Jacana shows a pop-up box with the current field name. Enter the first character(s) of the new field name, Jacana updates the field name. Press space or **Enter** to accept the field or press **Esc** to cancel.

|                                 |   |
|---------------------------------|---|
| <b>Format field</b>             | See and/or change the formatting for the current field.   |
| <b>Field Properties</b>         | See and/or change the properties of the current field, including type, size, description, data subset and map.  |
| <b>Insert line</b>              | Insert a blank line before or after the current line. The new line is of the same line type.  |
| <b>Delete line</b>              | Delete the current line.  |
| <b>Line properties</b>          | See and/or change the line properties for the current line. You can use this option to change the attributes and conditioning of the line in the report.  |
| <b>Resequence lines</b>         | Resequence layout lines by line type.<br>Note: "Change of ..." lines before detail will remain before detail lines and "Change of ..." lines after detail lines will remain after detail lines. |
| <b>Output setup</b>             | See and/or change the settings for the output media specified in the report sheet.  |
| <b>Sheet properties</b>         | See and/or change the current report sheet properties. You can specify attributes, banner and control pages and output settings.  |
| <b>LayoutWizard</b>             | Apply a LayoutWizard to the current report definition layout.   |
| <b>Convert to Record Layout</b> | Convert the report layout for output to disk with a structured record format.<br>Note: The existing design of the report format will be lost.   |

### Layout menu (Record view)

|  |              |
|--|--------------|
| I <u>n</u> sert Field                        |              |
| D <u>e</u> lete Field                        | Ctrl+Del     |
| M <u>o</u> ve Field <u>U</u> p               | Ctrl+Up      |
| M <u>o</u> ve Field <u>D</u> own             | Ctrl+Down    |
| F <u>o</u> rm <u>a</u> t Field...            | Ctrl+Shift+F |
| F <u>i</u> eld <u>P</u> roperties...         | Ctrl+F       |
| O <u>u</u> tput <u>S</u> etup...             |              |
| S <u>h</u> ee <u>t</u> <u>P</u> roperties... | Ctrl+H       |
| L <u>a</u> yo <u>u</u> t <u>W</u> izard...   | Ctrl+Shift+W |
| C <u>o</u> n <u>v</u> ert to Page Layout...  |              |

This menu allows you to work on the disk output layout of your report definition when the report output will use structured record formats, e.g. you can insert, move or delete fields, and select detail or summary level for output data. Select the option you require to perform the following functions.

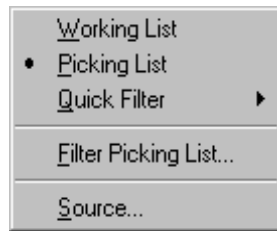
|                         |  |
|-------------------------|--|
| <b>Insert field</b>     | Insert the current field in the DataCrafter into the disk output fields list.  |
| <b>Delete field</b>     | Deletes the current field from the disk output fields list.  |
| <b>Move field up</b>    | Moves the current disk output field up the list.   |
| <b>Move field down</b>  | Moves the current disk output field down the list.   |
| <b>Format field</b>     | See and/or change the formatting for the current disk output field.  |
| <b>Field Properties</b> | See and/or change the properties of the current disk output field, including type, size, description, data subset and map.       |
| <b>Output setup</b>     | See and/or change the settings for the output media specified in the report sheet.   |
| <b>Sheet properties</b> | See and/or change the current report sheet properties. You can specify attributes, banner and control pages and output settings. |
| <b>LayoutWizard</b>     | Apply a LayoutWizard to the current report sheet.  |

**Convert to  
Page Layout**

Convert the report layout, redesigned for output to printer, workstation or to disk with unstructured record formats.

Note: The existing design of the report sheet will be lost.

Data menu



This menu allows you to work with the data in your report definition, e.g. you can select which field list is shown in the DataCrafter, filter the picking list, use QuickFilters, see the data properties, usage and source and find a given field. Select the option you require to perform the following functions.

**Working list** Show the working list of fields in the DataCrafter.

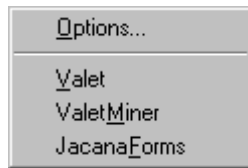
**Picking list** Show the picking list of fields in the DataCrafter.

**Quick Filter** Show either the summary fields, calculated fields, fields used for selections, parameters or constants in the DataCrafter.  
For the summary fields you can select which summary fields are shown in the DataCrafter.  
For definition of constant fields, refer to Message constants in your host product documentation.  
Jacana currently supports the use of existing constant fields defined in the report. However, you cannot define constant fields from Jacana. Use the host product to define a new constant field.

**Filter picking list** Define the criteria for filtering fields into the picking list from the data source.

**Source** See information on the source of the data for the report.

## Tools menu

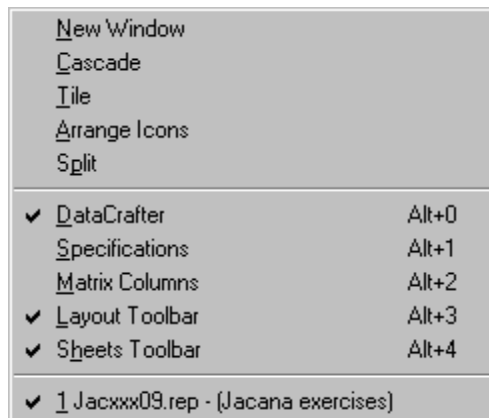


This menu allows you to see and/or change various Jacana settings, and use some products that complement Jacana. Other menu items may be shown if the user has customized the user tools.

**Options** Show the Jacana Settings dialog box. The tabs on this dialog box allow you to change screen appearance, report design defaults and other options.

**Valet, ValetMiner, JacanaForms.** These menu options give access to various products that complement Jacana, and will only be shown if the Jacana settings indicate the products are installed.

## Window menu



This menu allows you to control the various windows in Jacana, e.g. you can arrange your report definitions, split the layout window, switch between open report definitions and launch the specification dialog box. Select the option you require to perform the following functions.

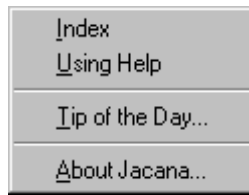
**New window** Open a new window with another copy of the current report definition.

**Cascade** Re-arrange the report definitions on your screen. Cascade arranges the report definitions to overlap so that each title bar is visible.

|                       |  |
|-----------------------|--|
| <b>Tile</b>           | Re-arrange the report definitions on your screen. Tile arranges the report definitions in smaller windows to fit next to each other.   |
| <b>Arrange icons</b>  | Re-arrange any report icons. Jacana places the report icons along the bottom of the layout window.   |
| <b>Split</b>          | Split the current report definition window. The window can be split both horizontally and vertically. Use the mouse or cursor keys to specify where you want to split the screen. You can also use the split bars (in the scroll bars) to create horizontal or vertical splits.<br>To remove a split, drag the split 'to the edge of the window. |
| <b>DataCrafter</b>    | Move the cursor into the DataCrafter. If the DataCrafter is turned off, Jacana displays it. The check mark indicates that the DataCrafter is visible.  |
| <b>Layout Bar</b>     | Move the cursor into the layout toolbar. If the layout toolbar is turned off, Jacana displays it. The check mark indicates that the layout toolbar is visible.   |
| <b>Specifications</b> | See and/or change the specifications for the report. The check mark indicates that the Specifications dialog box is visible.   |
| <b>Matrix Columns</b> | See and/or change the matrix columns specification for the report. The check mark indicates that the Matrix Columns dialog box is visible.   |
| <b>Sheets toolbar</b> | Move the cursor into the sheets toolbar. If the sheets toolbar is turned off, Jacana displays it. The check mark indicates that the sheets toolbar is visible  |

At the end of the Windows menu, Jacana lists the open report definitions. Choose the report definition you want to work with. The current report definition is indicated by a check mark.

## Help menu



This menu lists the various on-line help options. You can see the Help index, information on using the on-line help plus release and copyright information about Jacana. Select the option you require to perform the following functions.

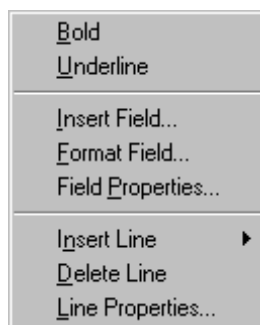
- |                       |   |
|-----------------------|---|
| <b>Index</b>          | See the on-line Help Index. This lists all the Help topics available for Jacana.                |
| <b>Using help</b>     | See information on how to use the on-line Help.   |
| <b>Tip of the Day</b> | See useful tips on how to use Jacana.   |
| <b>About Jacana</b>   | See information about Jacana. This includes release details, copyright and product information. |

## Shortcut menus

When you point to or choose some items in Jacana you can use a shortcut menu. Shortcut menus contain commands related to the item you're working with. Shortcut menus are available in both the layout window and the DataCrafter.

➡ Click on the right mouse button to see a shortcut menu.

For example, if you point to a field in the Layout window and click on the right mouse button, Jacana displays this shortcut menu.



## ▼ *Using Jacana - an introduction*

---

This section describes how to:

- ◆ start Jacana
- ◆ setup your AS/400 connection
- ◆ exit Jacana
- ◆ use the mouse for extra functions
- ◆ use the keyboard shortcuts.

### ▲ *Starting Jacana*

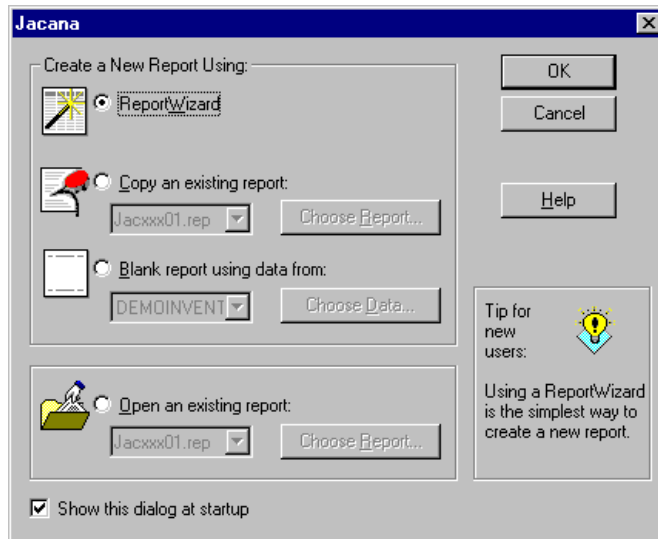
- √ Use the **Start** button to choose menu item **Start\Programs\Momentum\Jacana\Jacana**.

NOTE: The sub-menu **Momentum** may be different for private label installations of Jacana.

- √ Jacana starts and displays the Tip of the day dialog.



- √ Click on the Close button. Jacana displays the start dialog box.



- √ Select the option you want to either create a new report definition or open an existing report definition.  
For further details on creating a new report definition, refer to the *Creating a new report definition* section of this guide.

Jacana automatically connects to the last system and data library you used.

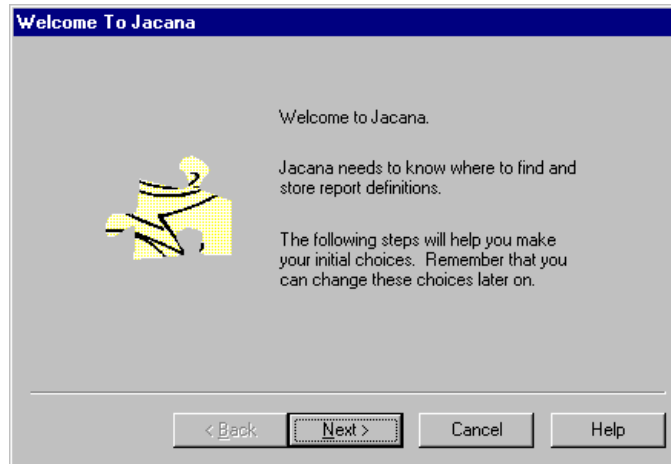
## Starting Jacana for the first time

Jacana has to know which AS/400 system and which data library you want to use. The first time you start Jacana, Jacana asks you to tell it where to find your data.

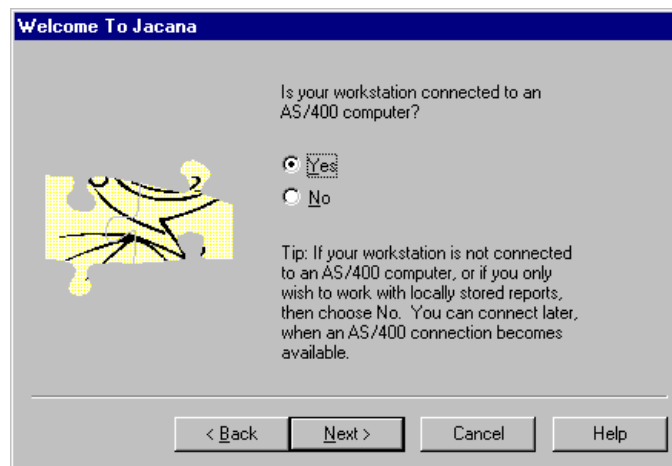
- ➔ Check which AS/400 system and data library you are connected to before you start.

To set up Jacana:

- √ Double-click on the Jacana icon. Jacana starts and displays the Welcome to Jacana dialog box.

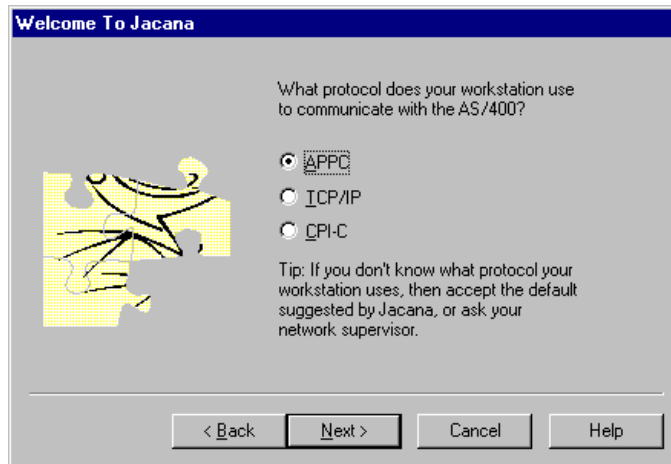


- √ Click on the **Next** button to continue. Jacana displays the next dialog box.

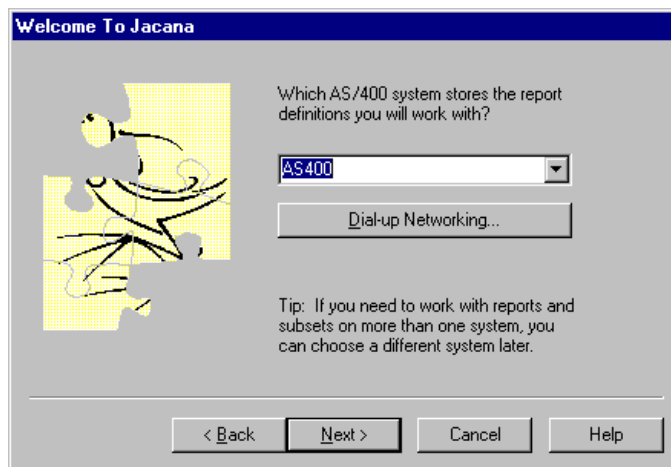


- √ Choose **Yes** if you are connected to an AS/400  
Choose **No** if you are not connected to an AS/400. Jacana stops the setup process here. You can connect to your AS/400 at a later date. For further information, refer to the *Changing your server* section of this guide.

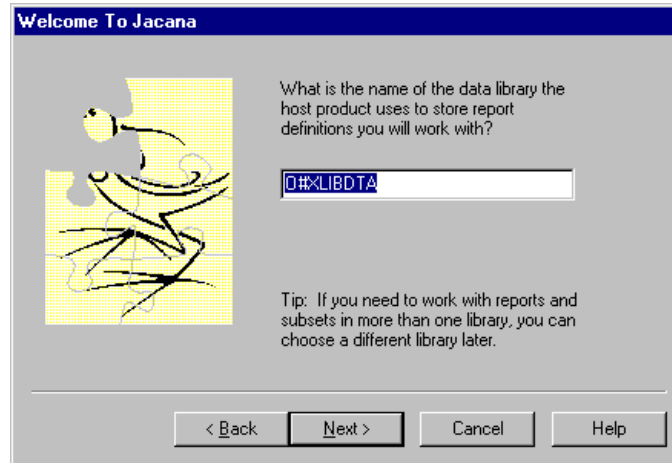
- ✓ Click on the **Next** button. Jacana displays the next dialog box.



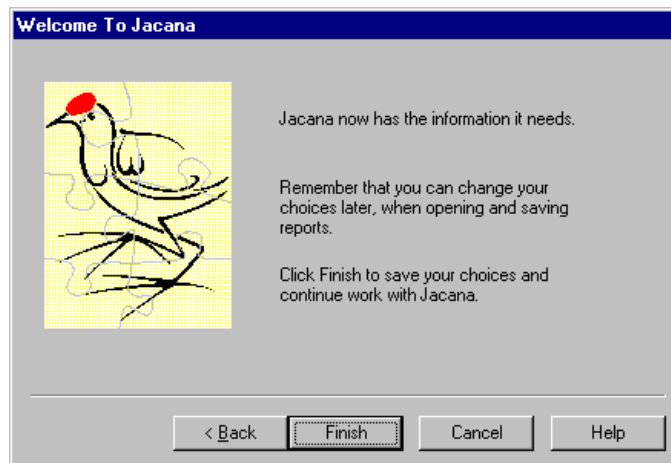
- ✓ Choose the protocol used for AS/400 communications. If you are unsure which protocol should be used with your AS/400, contact your network supervisor OR try each choice to establish which is correct for your configuration.
- ✓ Click on the **Next** button. Jacana checks your connection and displays the next dialog box.



- ✓ Choose the system you want to use from the drop-down list OR type the name of a configured AS/400 system
- ✓ Click on the **Next** button to continue.



- √ Enter the data library you want to use.
- √ Click on the **Next** button to continue. Jacana connects to the system and library you have chosen and displays the next dialog box.



- √ Click on the **Finish** button to complete setting up your system and library settings.

The settings you have just created will remain as the default settings until they are changed. Jacana will automatically use these settings each time it is started.

## ▲ *Exiting Jacana*

- √ Choose **Exit** from the **File** menu to exit Jacana.  
If there are any reports that you have created or changed and have not already saved, Jacana asks if you want to save them.

## ▲ *Your mouse!*

Jacana allows you to get more out of your mouse by giving power to the right mouse button!

By clicking the right mouse button you can complete some functions without having to move up to a toolbar or pull-down menu. These include:

- ◆ using shortcut menus
- ◆ specifying how a field appears in your report layout or in the report specifications dialog boxes.

For further information, refer to the *Toolbars, buttons and menus*, *Adding fields into your report definition* and *Refining your report - contents* sections of this guide.

## Keyboard shortcuts

Jacana is designed so it can be used with or without a mouse or other pointing device. Using the cursor keys, Tab key, Ctrl key and Alt key (often when used with another key) you can still use Jacana to its full extent.



Certain key combinations perform particular actions. These include the following.

| <b>This key</b> | <b>Does this</b>   |
|-----------------|--|
| Insert          | Edit-Overtyp   |
| F1              | Help   |
| Shift+F1        | Context Help   |
| F5              | Refresh layout view  |
| Ctrl+F6         | Next window  |
| Shift+F6        | Previous window  |
| F8              | Toggle Extended Selection mode                                 |
| Shift+F8        | Layout-Select Word   |
| Shift+F10       | Context menu<br>(equivalent to clicking on right mouse button) |
| Alt+0           | Window-DataCrafter   |
| Alt+1           | Window-Layout window   |
| Alt+2           | Window-Specifications  |
| Alt+3           | Window-Matrix Columns  |
| Alt+4           | Window-Sheets Toolbar  |
| &               | Insert field   |

| <b>This key with</b> | <b>CTRL<br/>Selects this menu and menu option</b> | <b>CTRL+SHIFT<br/>Selects this menu and menu option</b> |
|----------------------|---|---|
| Delete               | Layout-Delete Line                                |   |
| A                    | Edit-Select All                                   |   |
| B                    | Layout-Bold                                       |   |
| C                    | Copy  |   |
| F                    | Layout-Field Properties                           | Layout-Format Field                                     |
| I                    | Layout-Insert Line After                          | Layout-Insert Line Before                               |
| L                    | Layout-Line Properties                            |   |
| H                    | Layout-Sheet Properties                           |   |
| N                    | File-New  |   |
| O                    | File-Open   |   |
| P                    | File-Print  |   |
| Q                    | Layout-Resequence Lines                           |   |
| R                    | Report-Properties                                 |   |
| S                    | File-Save   |   |
| U                    | Layout-Underline                                  |   |
| V                    | Edit-Paste  |   |
| W                    | Report-ReportWizard                               | Layout-LayoutWizard                                     |
| X                    | Edit-Cut  |   |
| Y                    | Edit-Redo   | Multiple Edit-Redo dialog                               |
| Z                    | Edit-Undo   | Multiple Edit-Undo dialog                               |

The keyboard shortcuts are shown on the menu bar menus. However, they are not shown on the shortcut menus.

In addition, some other actions may be modified using keys as follows:

| Action  | This key | Does this   |
|---|----------|---|
| Save (  or menu)   | Shift    | Save As.  |
| New calculation<br>(  or option <b>New Calculation</b> in specifications short-cut menu) | Shift    | Reverse default action. See <b>Show Calculation Builder for new calculation</b> setting (see specifications tab in options dialog). |
| Moving insertion point in expressions   | Alt      | Reverse default <b>Auto-select</b> setting (see expressions tab in options dialog).   |

## ▼ *Using Jacana - Basic tasks*

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This section describes how to:

- ◆ create a new report definition
- ◆ modify an existing report definition
- ◆ save a report definition
- ◆ choose fields to use in a report definition
- ◆ add and remove fields to a report definition
- ◆ add text to a report definition
- ◆ refine the content of a report
- ◆ refine the appearance of a report
- ◆ set the appearance of a report
- ◆ preview how a report definition layout would appear when printed.

## ▲ *Getting results*

To create a report definition you may not have to do all of these tasks. Using a ReportWizard is often the fastest way to create your report definition. The ReportWizard helps you create a report definition by following a series of easy steps. You can then modify your report definition as much as you want to suit your needs.

For further details on ReportWizard, refer to the *Creating a new report definition* section below.

The ReportWizard is only one way Jacana has of letting you get on with your work. Jacana also has LayoutWizard and QuickFilters. You can use these whenever you are working on a report definition.

LayoutWizard helps you speed up the layout of your report. You can quickly choose or change how your report will appear. For further details on LayoutWizards, refer to the *Refining your report - appearance* section of this guide.

QuickFilters let you choose the types of fields you see in the DataCrafter. For further details on QuickFilters, refer to the *Using filters* section of this guide.

## ▲ *Creating a new report definition*

When you create a new report definition, you must specify both the content and the layout of the report. That is, you have to define what is in the report and where and how it is shown.

There are three ways to create a new report definition. You can create a report definition by using:

- ◆ a ReportWizard
- ◆ an existing report, or
- ◆ a data source, such as a data subset or database file.

The ReportWizard displays a series of dialog boxes that lead you through the steps in creating the report definition you really want.

Choose an existing report as the base to create a new report definition. This is useful when you need to create a new report definition that is very similar to an existing report definition.

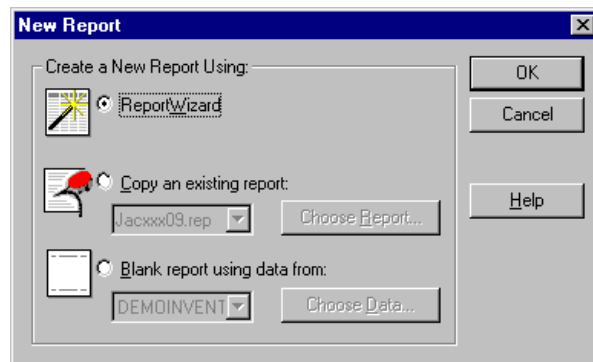
Choose a blank report using data from a subset or file to create a new report definition. This option gives the most flexibility but also requires you to make more decisions on report content and layout.

➡ Use a ReportWizard to quickly create your report definition.

### Using a ReportWizard

To create a new report definition:

- ✓ Click on the **New** button or choose **New** from the **File** menu. Jacana displays the New Report dialog box.

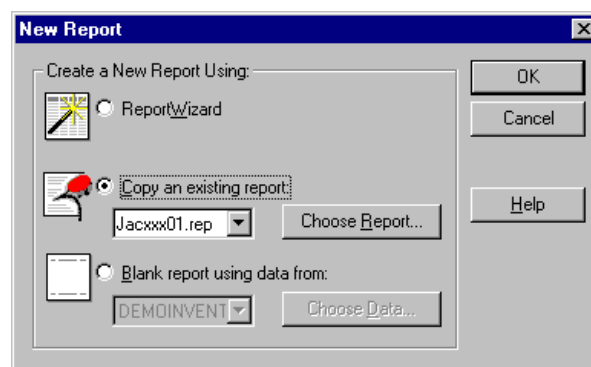


- √ Choose the **ReportWizard** option.  
Jacana displays either:
  - ◆ the first ReportWizard dialog box, or
  - ◆ the Choose Wizard dialog box.
- ➔ The Choose Wizard dialog is shown only if more than one Wizard is available, and the **Always use default ReportWizard** option is NOT set.
- √ The ReportWizard leads you through a series of dialog boxes. These ask you questions about what information you want in your report definition and how you want that information laid out.
- √ Click on the **Finish** button when you are satisfied with the settings you have entered. The ReportWizard will now create your report definition based on your answers.
- √ You can now modify your report if you want to.
- √ Remember to **Save** your new report definition.

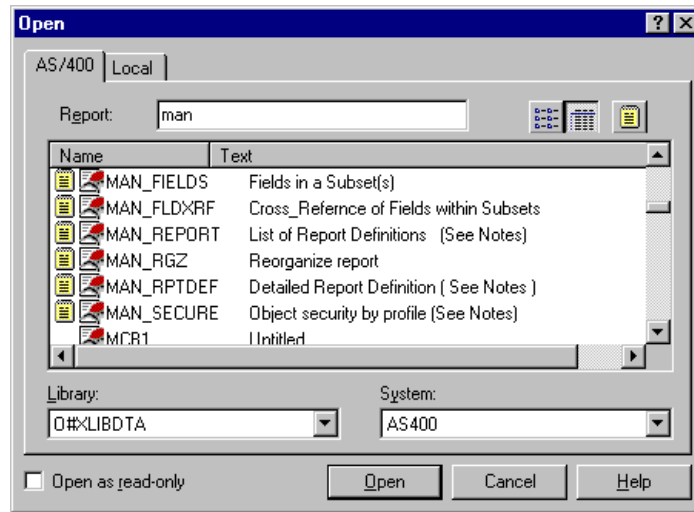
## Using an existing report definition


To create a new report definition from an existing report definition:

- √ Click on the **New** button or choose **New** from the **File** menu.  
Jacana displays the New Report dialog box.
- √ Choose the **Copy an existing report** option.



- √ Choose a recently used report definition from the drop-down list box or click on the **Choose Report** button to see the Choose Report dialog box.

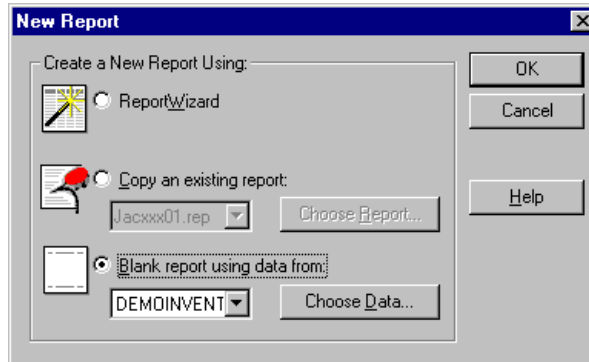


- √ Choose either the **Local** or **AS/400** tab depending on where the existing report definition is.
- √ If you choose a report on your PC, check the disk drive and directory are correct and choose the report you want.
- √ If you choose a report on your AS/400, check the library and system are correct and choose the report you want.
- ➔ To change your AS/400 or library, click on the pull-down list at the bottom of the screen. If your system is not shown, it must be configured via Client Access/400 or the L Connect and the Connection Wizard for TCP/IP.
- ➔ Use the **More about** button to see information about reports. 
- √ Click **OK** to load this report definition. Jacana displays the report's layout in the layout window and lists the fields in the DataCrafter.
- √ You can now modify your report definition.
- √ Remember to **Save** your new report definition.

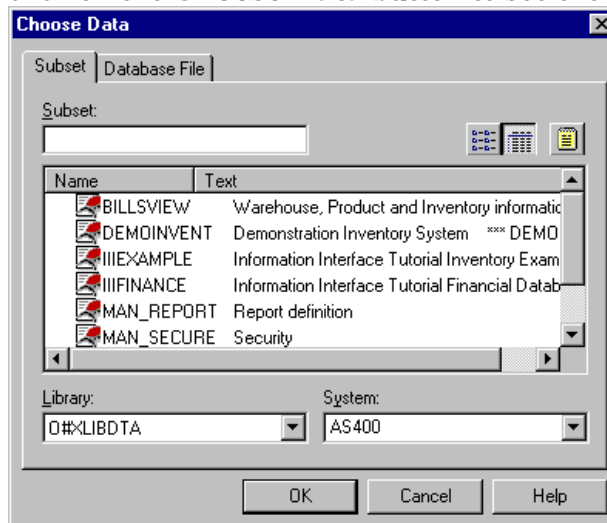
## Using a data source

To create a new report from a data source (a subset or a database file):

- ✓ Click on the **New** button or choose **New** from the **File** menu. Jacana displays the New Report dialog box.
- ✓ Choose the **Blank report using data from** option.



- ✓ Choose the data source you want to use from the drop-down list or click on the **Choose Data** button to see the Choose Data dialog box.



- ✓ Choose either the **Subset** or **Database file** tab depending on the data you want to use. If you are working off-line, only locally saved (on your PC) data sources are available.
- ✓ Choose the appropriate system and library. For a database file the library must be the library where the database file is, not the server product library.
- ✓ Choose the subset or database file you want to use for your new report definition.
- ➔ Use the **More about** button to see information about a data source.



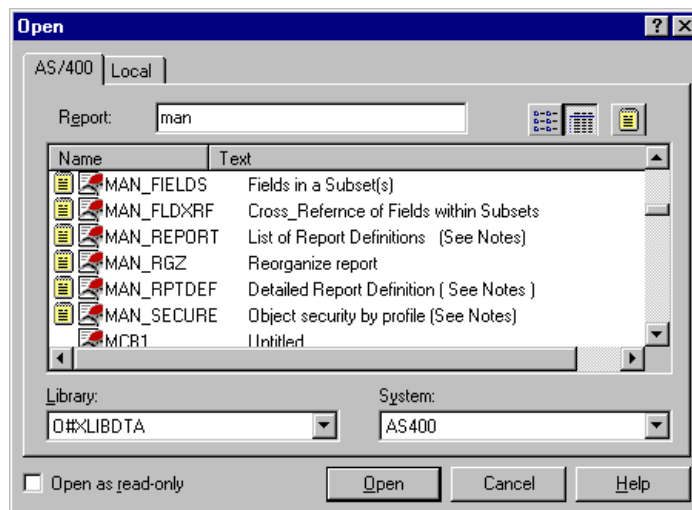
- ✓ Click **OK** to load this data. Jacana displays a default report layout in the layout window and lists the fields in the DataCrafter.
- ✓ You can now create your report. Remember to **Save** your new report definition.

## ▲ *Modifying an existing report definition*

Sometimes you may want to change a report that you have already defined. This may be due to changing user needs or other changes, for example, a report did not give the exact result you wanted.

To modify an existing report definition:

- ✓ Click on the **Open** button or choose **Open** from the **File** menu. Jacana displays the Open dialog box.



- ➡ Jacana lets you have multiple report definitions open at any time.
- ✓ Choose either the **Local** or **AS/400** tab, depending on whether the report definition you want is on your PC or on the AS/400.
- ✓ If you choose a report on your PC, check the disk drive and directory are correct and choose the report you want.
- ✓ If you choose a report on your AS/400, check the library and system are correct and choose the report you want.
- ✓ Jacana retrieves your report definition and displays it on your screen.

- ✓ Remember to either **Save** your report or **Save As** to create a new report.

## ▲ *Saving your report definition*

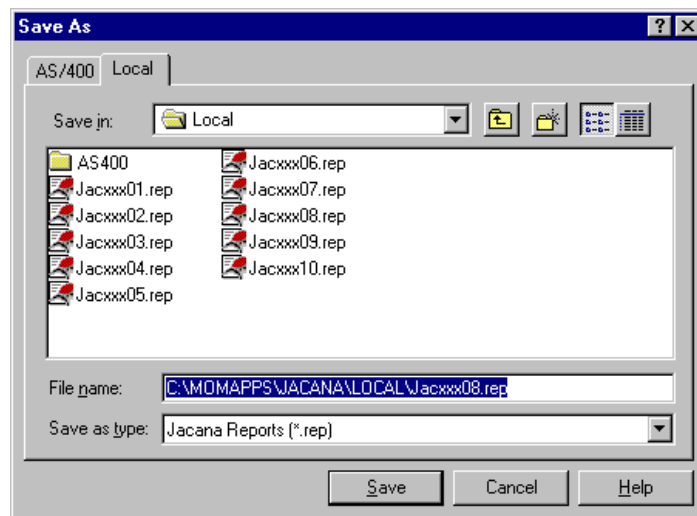
You must save your report definitions to the AS/400 before you can run them using your server product. You can save your report definitions locally (on your PC) and on your AS/400.

- ➔ You might want to save your report definition locally if you want to work on it later, without signing on to your AS/400. You will have to save it to your AS/400 when it is finished so your server product can run it.

### Saving a new report definition

To save a new report definition:

- ✓ Click on the **Save** button or choose **Save** or **Save As** from the **File** menu. Jacana displays the Save As dialog box.



- ✓ Choose either the **Local** or **AS/400** tab depending on whether you want to save this report definition on your PC or AS/400.
- ✓ If you want to save the report on your PC, check disk drive and directory are correct and enter a file name.

- √ If you want to save the report on your AS/400, check the library and system are correct and enter a report name.
- √ Click **OK**. Jacana saves your report definition.
- ➡ When you save a report definition locally (on your PC) it is held as a separate file. Report definition files have the default extension .REP.

## Saving a modified report definition

To save a modified report definition, using the same name, complete this procedure. The version you save replaces the original version of the report definition.

- √ Click on the **Save** button or choose **Save** from the **File** menu. Jacana saves your report definition and updates the saved report to include your changes.

## Saving a modified report definition as a new report definition

To save a modified report definition as a new report definition:

- √ Choose **Save As** from the **File** menu.
- √ Choose either the **Local** or **AS/400** tab depending on whether you want to save this report definition on your PC or AS/400.
- √ If you want to save the report on your PC, check disk drive and directory are correct and enter a file name.
- √ If you want to save the report on your AS/400, check the library and system are correct and enter a report name.
- √ Click **OK**. Jacana saves your report definition.
- ➡ When you save a report definition locally (on your PC) it is held as a separate file. Report definition files have the default extension .REP



## ▲ *Adding fields into your report definition*

When you run a report, it is the fields you specify in the report definition that determine what information is shown. An important part in creating a report definition is adding the correct fields in the correct place. Jacana makes this easy by allowing you to drag-and-drop the field from the DataCrafter into the exact place you want it in the layout window.

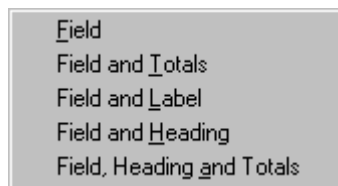
You can add fields to your report in one of three ways. You can either use

- ◆ your mouse,
  - ◆ your keyboard, or
  - ◆ a menu.
- ➔ Use the right mouse when adding fields. Jacana displays the shortcut menu to help you.

### Using your mouse

To use the mouse to add a field to your report definition:

- √ Click on the field you want in the DataCrafter.
- √ Drag-and-drop the field where you want it in the layout window. Jacana shows an outline of the field as you position it in the layout window. Drop it where you want it to be.
- √ If you used the right mouse button, Jacana displays a shortcut menu.



- √ Choose the field option you want to insert into your report definition. Any option that is not available is 'grayed out'. Headings are added at the top of the report layout, labels are shown to the left of the field and totals are shown at the bottom of the report layout.
- √ If you used the left mouse button only, Jacana inserts the field into your report layout.

- √ If you use the left mouse button with one of these keys, Jacana will include the detail shown.

| <b>This key</b> | <b>Adds this</b>  |
|-----------------|-------------------|
| <b>Shift</b>    | Field and heading |
| <b>Alt</b>      | Field and totals  |
| <b>Ctrl</b>     | Field and label   |

Note: You can use these cumulatively, e.g. dragging a field with the left mouse button while holding the Shift and Alt keys will insert the field with its heading and totals.

## Using your keyboard

To use the keyboard to add a field to your report definition:

- √ Place the cursor exactly where you want the field inserted into the layout window.
- √ Press the **&** (ampersand) key. Jacana shows a pop-up box with the name of current field from the DataCrafter.



- √ Enter the first character(s) of the field you want. Press space or **Enter** to accept the field or press **Esc** to cancel.
- √ If you hold one of these following keys as you press space or **Enter**, Jacana will include the detail shown.

| <b>This key</b> | <b>Adds this</b>  |
|-----------------|-------------------|
| <b>Shift</b>    | Field and heading |
| <b>Alt</b>      | Field and totals  |
| <b>Ctrl</b>     | Field and label   |

Note: You can use these cumulatively, e.g. holding the Shift and Alt keys will insert the field with its heading and totals.

## Using a menu

To use a menu to add a field to your report definition:

- √ Place the cursor exactly where you want the field inserted into the layout window.
- √ Highlight the field you want in the DataCrafter (This step is optional).
- √ Choose the **Layout** menu.
- √ Choose the **Insert field** option. Jacana shows a pop-up box with the name of current field from the DataCrafter.



- √ Enter the first character(s) of the field you want. Press space or **Enter** to accept the field or press **Esc** to cancel.
- √ If you hold one of these following keys as you press space or **Enter**, Jacana will include the detail shown.

| <b>This key</b> | <b>Adds this</b>  |
|-----------------|-------------------|
| <b>Shift</b>    | Field and heading |
| <b>Alt</b>      | Field and totals  |
| <b>Ctrl</b>     | Field and label   |

Note: You can use these cumulatively, e.g. holding the Shift and Alt keys will insert the field with its heading and totals.

## Inserting and Insert/Overtyping mode

If you are working in Overtyping mode and insert a field in the same location as or overlapping another field, it will replace that other field. If you are working in Insert mode, the field will be inserted and both fields will be in your report layout.

If you are working in Overtyping mode and use Backspace or Delete to remove fields and/or text, Jacana will not move the material to the right, i.e. the positioning of other fields and text is retained.

If you are working in insert mode, fields and text may be pushed past the right boundary of your report. When saving the report, Jacana will issue a diagnostic message to warn you if this has occurred. To find fields or text which is beyond the right boundary of your report, either:

- ◆ Press the delete key repeatedly until the fields or text is shown, or
- ◆ Use output settings to make your report sheet wider.

## Removing fields from a report definition

You may need to remove a field from your report definition. This is done very easily. To remove a field:

- √ Click on the field you want to remove.
- √ Press the **Delete** key or the **Backspace** key. Jacana removes the field.

To remove a selection of fields and text from your report::

- √ Use you mouse to lasso the data you want deleted.
- √ Press the **Ctrl + X**. Jacana removes the selection.

## ▲ *Adding text to your report definition*

To add text to your report definition:

- √ Position the cursor in the layout where you want to add the text.
- √ Type the text you want to add to the report layout.

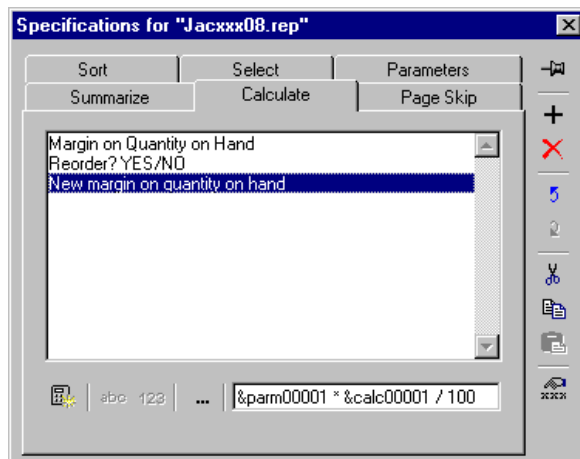
- ✘ **Check the overtype indicator.**  
**If you are in overtype mode the characters you type will overtype or replace the existing characters.**  
**In insert mode, Jacana inserts your text while keeping all the existing information.**

## ▲ Refining your report - contents


After you have created the basic layout and contents of your report definition, perhaps using the ReportWizard, you can refine it further. You can specify quite detailed and/or complex specifications for sorting, selecting, summarizing, manipulating and displaying the data and the report. This helps you get exactly the report you want.

Using the Report Specifications dialog box you can set:

- ◆ how the data is sorted (sort tab)
- ◆ how the data is summarized (summarize tab)
- ◆ the run-time parameters (parameters tab)
- ◆ the run-time selections (select tab)
- ◆ the calculated workfields (calculate tab)
- ◆ where page breaks occur for the report (page skip tab), and
- ◆ Cut, copy and paste report-defined fields.



√ You can see this dialog box by either:

- » Choosing the **Specifications** option from the **Report** menu, or
- » Clicking on the Report Specifications button on the standard toolbar. 

Use this dialog box to build calculations, parameters, workfields and select/omit parameters for your report definition.

The Report Specifications dialog box has six tabs, which allow you to set different types of report specifications. Each tab, described in the following sections, has a row of buttons along the bottom of the window to allow you to quickly set the specifications you want for your report.

You can use the data fields in setting many of the report specifications. Simply drag-and-drop the field you want from the DataCrafter into the dialog box and apply the specifications you need. Dragging fields here works in much the same way as in the layout window. If you drag-and-drop a field with the left mouse button, Jacana inserts the field into the dialog box. If you drag-and-drop a field with the right mouse button, Jacana displays a shortcut menu from which you can choose the field option you want. You can also see this menu by clicking on a field in this dialog box using the right mouse button.

With each of the tabs in the Report Specifications dialog box you can use multiple fields. You can combine fields to create complex tests or specifications to suit your needs.

The Report Specifications dialog box has buttons down its right hand side that can help you build the specifications. The buttons have the following actions.



toggles the Pinned status of the specification dialog. If pinned, when the escape key is pressed, the specifications dialog will remain open, but focus will be passed to the Layout window. Close a pinned dialog using the standard Close Window button in the title bar.

This is equivalent to the Keep open menu option of the control-box menu (shown by **Alt** + spacebar or right click on dialog title).



adds the current field from the DataCrafter into this dialog box. Or you can drag-and-drop a field from the DataCrafter.



removes the current field from the dialog box list.



'promotes' the current field up the dialog box list. You can use this to change the order in which, for example, a report is sorted or the calculated fields are processed.



'demotes' the current field down the dialog box list. You can use this to change the order in which, for example, a report is sorted or the calculated fields are processed.



cuts the chosen field from the specification field list. This field is then available for pasting to the specification dialog of another report or sheet.



copies the chosen field from the specification field list. This field is then available for pasting to the specification dialog of another report or sheet. E.g. Use the copy and paste buttons to copying a work field from one report to another.




pastes a cut or copied field.



displays the properties of the current field.  
NOTE: In some tabs (such as Summarize, and Selection) this button shows the properties for the based on field. This is because there may be several report-defined fields arising from the one entry in the specifications field list.

To see the properties for Summary or Select fields:

1. Click on the appropriate QuickFilter in the DataCrafter.
2. Choose the field you want to show properties for.
3. Click on the button in the DataCrafter.

For help in this dialog, click help button  in standard toolbar, then click on the item you want help for.

The following description of the six Report Specifications tabs describes how to create the various types of specification you can add to report definitions using the mouse. You can choose to use these buttons to do many of the same functions.

Any fields used or created using this dialog box are available using the QuickFilters in the DataCrafter.

➡ Use your mouse.

You can use the mouse to do nearly everything - drag fields, build expressions, add specifications, etc.

## Sort tab

Use this tab to choose the fields to sort your report by.

You can control the order in which data appears in your report by specifying sort fields and sort levels. For example, a company sales report might show for each COMPANY a list of products, and for each PRODUCT, a list of the INVOICES involved. This report would have the sort sequence:

COMPANY (major)

PRODUCT

INVOICE (minor)

COMPANY, PRODUCT and INVOICE are the sort fields. COMPANY is the major sort field, that is, it has the lowest sort level value. INVOICE is the minor sort field and has the highest sort level value. A different report would be produced if the sort sequence was changed to:

PRODUCT

COMPANY

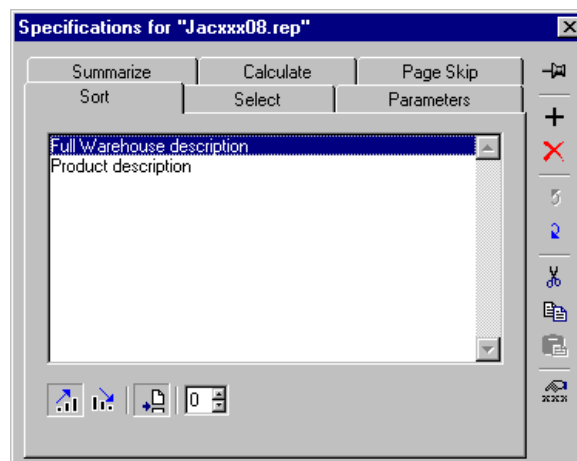
INVOICE

The report would contain the same data but with a different emphasis. It would show, for each PRODUCT, a list of COMPANIES; and for each COMPANY, a list of INVOICES - a product sales report rather than a company sales report.

You can sort using any field, including sub-totals.

To specify a sort:

- ✓ Click on the **Sort** tab. Jacana shows this dialog box.



- ✓ Drag-and-drop the field you want to sort by into the dialog box.
- ✓ Click on the button to choose either:



an ascending sort,



or descending sort.

- √ Click on the page break button if you want Jacana to insert a page break when the sort field changes value.



If you do set a page break, this is also shown in the **Page Skip** tab.

- √ Set the spacing between sorted detail lines with the Blank lines to space box.



This is the number of blank lines inserted between groups in the sorted detail lines of the output. You can set the spacing from 1 to 9 lines. Inserting space into the output makes it easier for the user to read, particularly if no “Change of...” line types have been used.

## Select tab

Use this tab to determine what data appears in the output. You can specify the fields that will be used to choose the data to include or exclude (select or omit) in the report.

- ◆ A select field is used to include data in reports.
- ◆ An omit field is used to exclude data from reports.

For example, you could create a select test that included records for particular warehouses. Or you could create a report that omitted customers with a zero balance. You can also allow the user to specify the select/omit value when they run the report.

You can specify a set of rules or tests for each select/omit field. These are used to pick the records used in the output report.

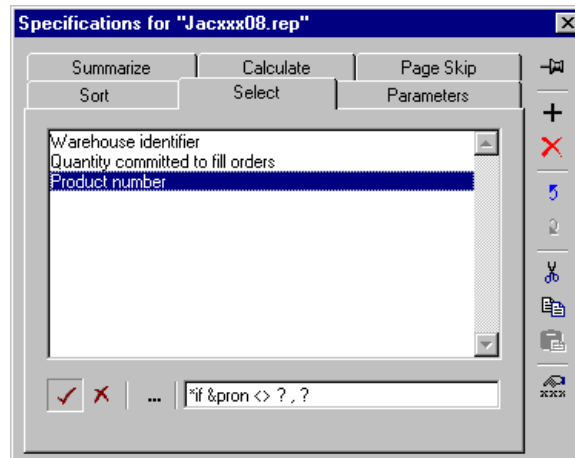
For each record, the value of the select field is tested against the rules. If the values satisfy the test criteria, the record is accepted for inclusion in the report.


Any field can be used to select or omit data providing it has not been specifically excluded from being used in this way in the server product's data dictionary definition, e.g. Report page number.

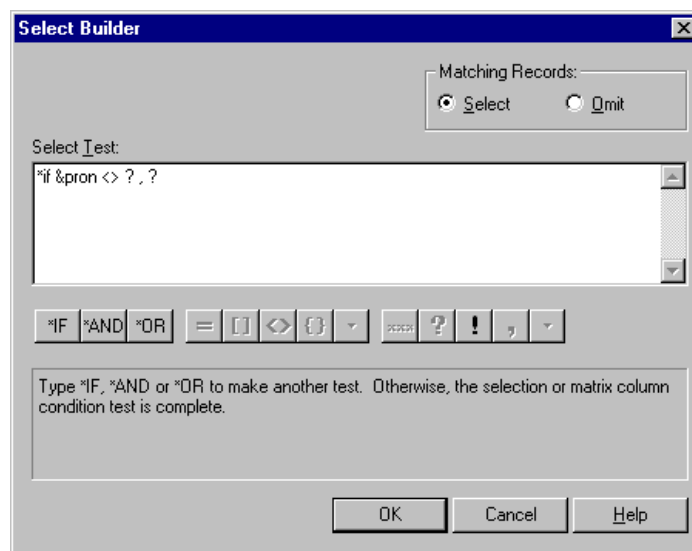
Select and Omit selections work in exactly the same way, just click on the appropriate button.

To specify a select/omit test:

- ✓ Click on the **Select** tab. Jacana shows this dialog box.



- ✓ Drag-and-drop the field you want to select by into the dialog box.
- ✓ Click on either the  select or  omit button, depending on what kind of test you want. That is, do you want to include or exclude records from the report?
- ✓ Either type the select/omit test expression in the box or click on the builder button.  Jacana displays the Select Builder dialog box.



- √ Check that the matching records indicator is correctly set to select or omit.
- √ Enter or build the select test expression. You can either type the expression into the Select Test box or build it using the buttons. Clicking on a button will insert that operator or variable at the current cursor location.
- ➔ Jacana gives hints on how to build your expression in the bottom of the dialog box.

#### Logical operator buttons



Logical IF command



Logical AND command to join select/omit tests



Logical OR command to add an alternate select/omit test

Operator/mathematical function buttons. Use these to determine how data will be selected or omitted. For example, you could be asking the run-time user to specify what value a record must equal to be included.



equal to. Allows you to ask the user what the value must be equal to to be selected/omitted.



containing. Allows you to ask the user what the value must include to be selected/omitted.



in the range. Allows you to ask the user to specify a range that the value must fall in to be selected/omitted.



in the list. Allows you to ask the user to specify a list of acceptable values that may be selected/omitted.



shows a menu of other conditional operator functions.

#### Value buttons



inserts the current field from the DataCrafter into the expression.



run-time variable. This allows the variable to be asked for when the report is run on the AS/400.



ignore sign or case. Instructs the AS/400 to ignore the sign or case of the record, e.g. 'a' is treated as 'A'.



comma. Use this to separate items in a list or range.



shows a menu of special values.

- √ You can create linked tests for a field using the **IF**, **AND** and **OR** buttons.
- √ Click **OK** to finish building your select test.
- ➔ You can edit the run-time prompt text. This is the prompt the AS/400 will show when asking for the run-time select/omit values. Click on the Run-time interface button or use the **Run-time Interface** option from the **Report** menu. For further details, refer to the *Editing the run-time interface* section of this guide.

## Parameters tab

Use this tab to add run-time parameters to your report definition. These are parameters that are accepted into the report and used in the report's processing. For example, you could have a parameter that asks for that day's exchange rates and then uses those rates to calculate various figures and totals for the report. Parameters allow additional flexibility in running a report.

Parameters can affect the type of report that is run. Some examples of how parameters can affect or influence report processing include:

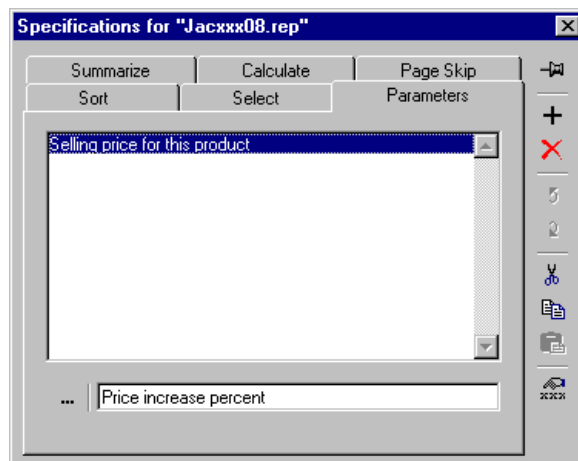
- ◆ A run-time parameter that allows the user to perform 'what-if' reports, e.g. what if the commission or the selling prices were changed by 15%? You could do this by creating a workfield with the formula  
New Selling Price = Existing Selling Price x (1 + Parameter / 100).
- ◆ A run-time parameter asking the user what level of detail they want in their report, e.g. by conditioning detail lines with the formula:  
Parameter 'Show detail?' = YES.
- ◆ A run-time parameter asking what the minimum, threshold level is of a field to include that record in a report.
- ◆ A run-time parameter prompting the user to indicate if they are running an end-of-month or end-of year report and thus determining what calculations are performed and what information is shown in the output.


Run-time parameters can allow you to effectively create different reports from one report definition rather than having multiple report definitions. This is done by having the user choose what they want when they run the report on the AS/400.

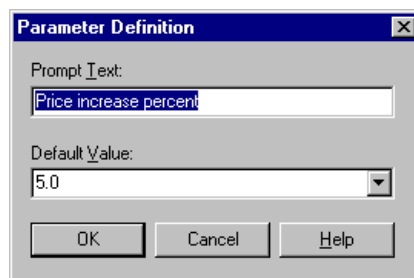
A run time parameter must be associated with a field from the picking list and it will adopt the attributes of this field.

To specify a run-time parameter:

- ✓ Click on the **Parameters** tab. Jacana shows this dialog box.



- ✓ Drag-and-drop the field you want to attach a run-time parameter to into the dialog box.
- ✓ Click on the extended definition button.  Jacana displays the Parameter Definition dialog box.



- ✓ Enter the prompt text. This is the text the user will be shown when asked for a value for this field.
- ✓ Enter the default value. This is the value to be used if the user does not enter a value.
- ✓ Click **OK** to finish defining the parameter.

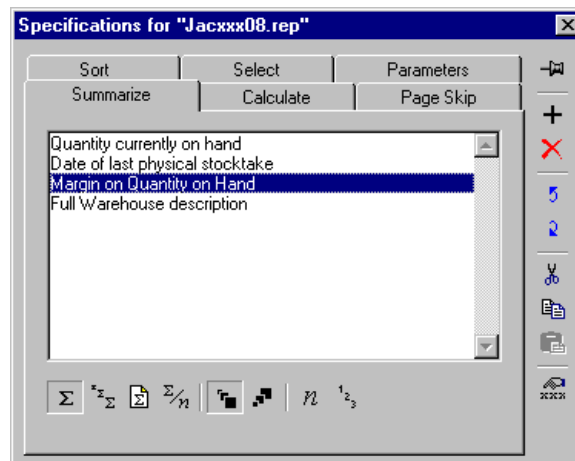
- ➔ You can add further run-time prompt text. Click on the Run-time interface button or use the **Run-time Interface** option from the **Report** menu. For further details, refer to the *Editing the run-time interface* section of this guide.

## Summarize tab

Use this tab to add summary fields to your report definition. Summary fields can include totals, averages, maxima, minima and counts.

To add a summary field:

- ✓ Click on the **Summarize** tab. Jacana shows this dialog box.



- ✓ Drag-and-drop the field you want summary values for into the dialog box.
- ✓ Click on the summary buttons you need. You can have various summary values for each field. The buttons allow you to add:



normal total (numeric fields only)



running total (numeric fields only). A running total is the total of the contents of the field for all the records included so far.



page total (numeric fields only)



average (numeric fields only)



maximum value



minimum value



number of records (count), and/or



number of unique values (count).

## Calculate tab

Use this tab to create workfields or calculated fields to add to the report definition.

A workfield contains one or more expressions for calculating a value and a set of conditions that control which expression is used at a particular time. Workfield expressions can include mathematical computation, character string manipulation and/or logical comparison.

For example, to create a report that will let the user determine the products that need to be reordered, you could include all of the following fields below in the report output and then do the reorder calculations by hand.

| <b>Field name</b> | <b>Field description</b>          |
|-------------------|-----------------------------------|
| QOHD              | Quantity on hand                  |
| QORD              | Quantity committed to fill orders |
| QDEL              | Quantity awaiting delivery to us  |
| QROL              | Level at which to reorder         |

Alternatively, you could create a workfield that calculated a net quantity on hand (i.e.  $QOHD + QDEL - QORD$ ) for each product. This workfield can then be included in the output instead of the raw data, saving the user the trouble (and the potential for error) of calculating the figures.

For every workfield you create, you must specify the field characteristics. These can include field type, edit codes, etc. You must then define the expression that will be used to calculate a value for the field.

A workfield can contain up to 20 alternative expressions by using conditions. For further details on conditions, refer to the *Condition builder* section below.

During calculation, condition sets are tested in sequence.

If the condition set is satisfied, the associated expression is used to generate a value for the workfield.

If no condition set is met, the workfield will be calculated using the expression associated with the *else*.

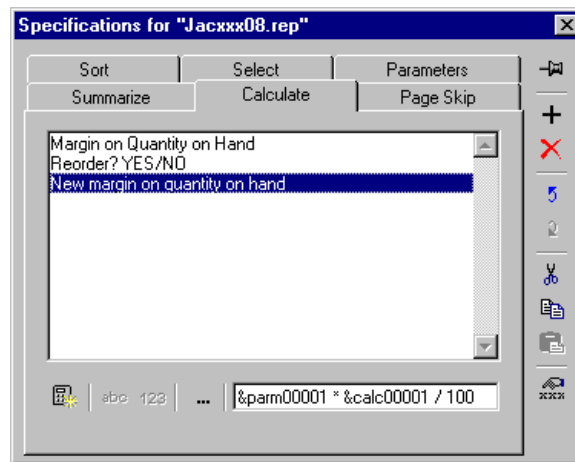
The calculation stops when a value has been generated.

When you create a workfield, a field name is automatically allocated to it.

➔ Workfields can be used in the same way as any other data field.

To create a workfield:



√ Click on the **Calculate** tab. Jacana shows this dialog box.




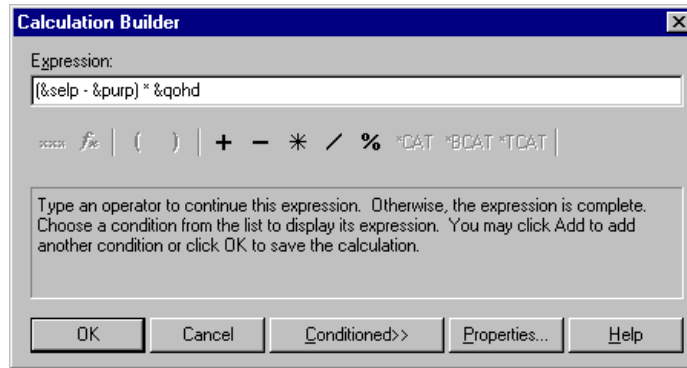
√ Drag-and-drop the first field you want to use in your calculation into the dialog box or press the New Calculation button.



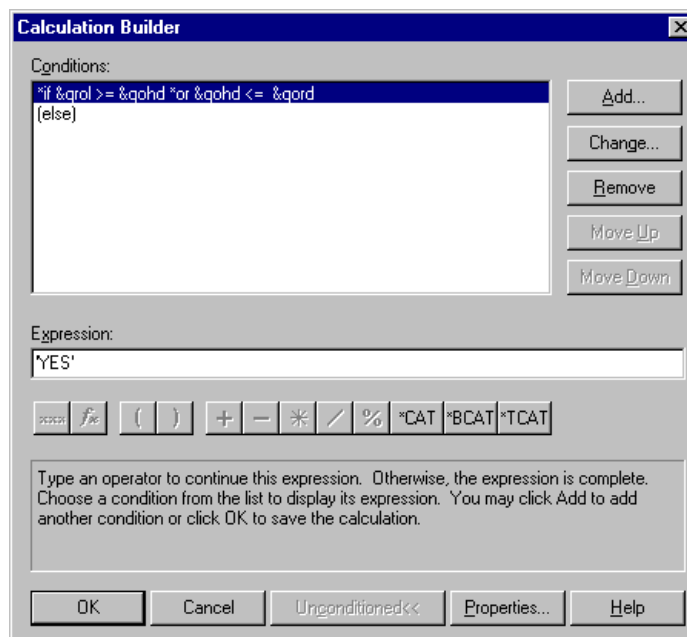
➔ The **Move Up** and **Move Down** buttons change the processing sequence for the calculations at run-time. That is, the order in which calculations are shown here is the order they will be done in when the report is run.

√ Click on the alpha  or numeric  button to specify the type of calculation you want. This usually depends on what kind of fields you are calculating from.

- √ Click on the calculation builder.   
Jacana displays the Calculation Builder dialog box (see next page).  
Use this box to help you build calculations.  
For simple workfields, the standard dialog is shown:

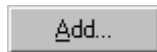


For conditioned workfields, or if the **Conditioned** button is clicked, the expanded dialog is shown:

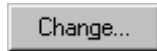


- ➡ The Expression box can only display one expression at a time. To see a particular expression for a condition, click on the condition in the upper part of the dialog box.
- √ Enter or build the calculation. You can either type the calculation into the Expression box or build it using the buttons and/or by dragging in fields. Jacana gives hints on how to build your expression in the bottom of the dialog box.

- √ Click on the buttons down the side of the dialog box to:



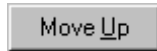
add a condition. Jacana displays the Condition Builder.



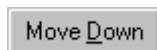
change a condition. Jacana displays the Condition Builder.



remove a condition and its related expression.



move a condition up or 'promotes' the current field up the dialog box list. This changes the order in which the lines are processed.



move a condition down or 'demotes' the current field down the dialog box list. This changes the processing order.

- √ Clicking on a button will insert that operator, function or variable into the expression at the current cursor location. The buttons insert the following:

#### Field/function buttons



inserts the current field from the DataCrafter into the condition.



shows a menu of available functions.

#### Parentheses buttons



open parentheses



close parentheses

#### Arithmetic operator buttons



plus



minus



multiply



divide



percentage

### Character operator buttons



join two character strings, including any trailing blank characters in the first string.



join two character strings, after removing any trailing blanks from the first string and then inserting a single blank character.



join two character strings, after removing any trailing blanks from the first string.

√ Click **OK** to finish building the calculation.

### Condition builder

Use this dialog to create conditions that can be used in:

- ◆ calculation specifications,
- ◆ controlling the printing of data lines,
- ◆ matrix columns.



Each condition set (single group of linked conditions) may contain up to five condition lines. Within each condition line there must be four pieces of information. These specify:

- ◆ the logical relationship of the current condition to the previous condition - the AND/OR.  
The first condition line always started with IF. Succeeding lines can be either AND or OR.
- ◆ the field to be tested by the current condition. This can include workfields.
- ◆ the comparison operator to use for the test
- ◆ a value to test against the field - the condition value or field. This can be a simple fixed value, a complex mathematic computation (which can include parenthetical material) or character manipulation.

For example, this condition set specifies a zip code from 20,000 to 29,999.

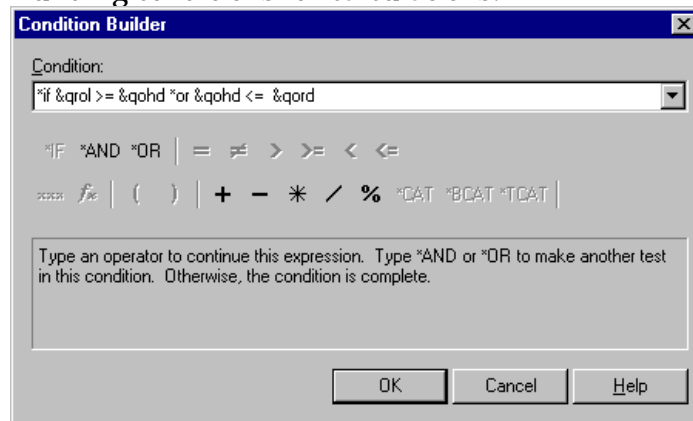
| AND/OR | Field | Comparison operator | Condition (field/value) |
|--------|-------|---------------------|-------------------------|
| IF     | ZIP   | >=                  | 20000                   |
| AND    | ZIP   | <=                  | 29999                   |

√ To show the condition builder:

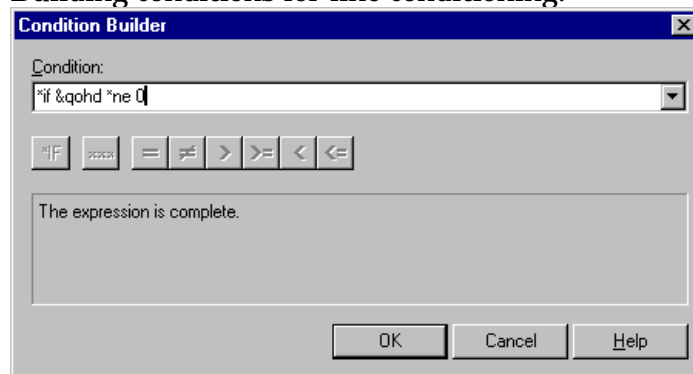
- ◆ click on the Condition Builder button  in the Line properties dialog,
- ◆ click on the **Add** or **Change** buttons in the Calculation builder,
- ◆ click on the Condition Builder button  in the Matrix Columns dialog

Jacana displays the Condition Builder dialog box in one of the following ways:

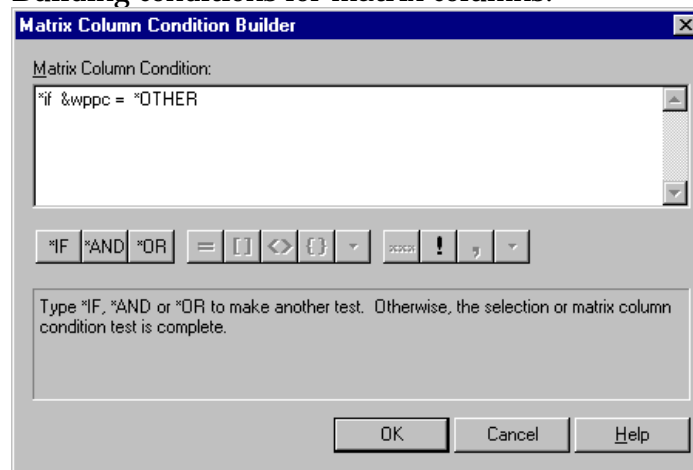
#### Building conditions for calculations:



#### Building conditions for line conditioning:






### Building conditions for matrix columns:










- √ Enter or build the condition. You can either type the condition into the Condition box or build it using the buttons and/or by dragging in fields. Jacana gives hints on how to build your condition in the bottom of the dialog box.
- √ Clicking on a button will insert that operator, function or variable into the condition at the current cursor location. The buttons insert the following:

#### Logical operator buttons

-  Logical IF command.
-  Logical AND command to join conditions.
-  Logical OR command to add an alternate condition.

#### Conditional operator buttons

-  equal to
-  not equal to
-  greater than
-  greater or equal to
-  less than
-  less than or equal to
-  containing. Allows you to ask the user what the value must include to be selected/omitted.



in the range. Allows you to ask the user to specify a range that the value must fall in to be selected/omitted.



in the list. Allows you to ask the user to specify a list of acceptable values that may be selected/omitted.



shows a menu of other conditional operators.

#### Field/function buttons



inserts the current field from the DataCrafter into the condition.



shows a menu of other available functions.

#### Parentheses buttons



open parentheses



close parentheses

#### Arithmetic operator buttons



plus



minus



multiply



divide



percentage

#### Character operator buttons



join two character strings, including any trailing blank characters in the first string.



join two character strings, after removing any trailing blanks from the first string and then inserting a single blank character.



joint two character strings, after removing any trailing blanks from the first string.

### Value buttons



ignore sign or case. Instructs the AS/400 to ignore the sign or case of the record, e.g. 'a' is treated as 'A'.



comma. Use this to separate items in a list or range.



shows a menu of special values.

- √ You can create linked tests for a field using the **IF**, **AND** and **OR** buttons.

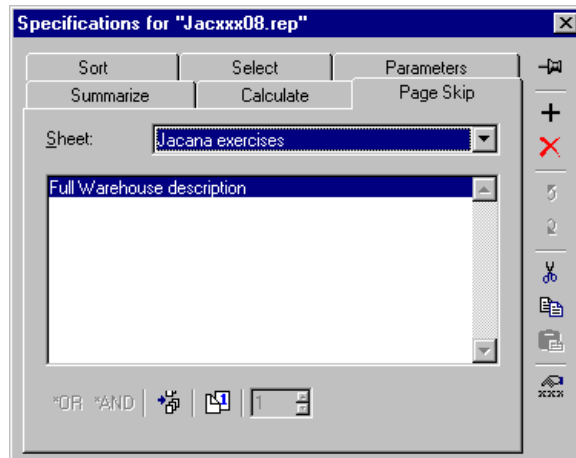
Click **OK** to finish building the condition.

### Page skip tab



Use this tab to set page skips in the report. These will cause the report to go to a new page or spool file when the chosen field changes in value, e.g. you could set a stock report to start a new page when the warehouse number changes.

To set a page skip:

- √ Click on the **Page Skip** tab. Jacana shows this dialog box.



- √ Select a report sheet you want page breaks for using the **Sheet** pull-down list.
- √ Drag-and-drop the field(s) you want to force page breaks by into the dialog box.

√ You can create complex page skip tests by using the  and  buttons to link tests, e.g. you can specify to go to a new page when one or more fields change value.

√ Click on the New File button if you want to create a new spool file rather than a page skip.



√ Click on the Restart Page Numbering button if you want to re-set the page numbering when the report goes to a new page or spool file. Enter the number you want to re-start at in the box.



## ▲ *Refining your report - matrix columns*

What is a matrix report?

A matrix is an array of columns and rows containing information. The concept is best shown using an example. Let us consider a report that shows quarterly sales using simple report design, i.e. not using matrix.

| <i>State</i> | <i>Qtr</i> | <i>Sales</i> | <i>Profit</i> |
|--------------|------------|--------------|---------------|
| CA           | 1          | 1.1          | 0.3           |
|              | 2          | 1.0          | 0.3           |
|              | 3          | 1.1          | 0.4           |
|              | 4          | 1.3          | 0.5           |
| FL           | 1          | 1.3          | 0.4           |
|              | 2          | 1.1          | 0.3           |
|              | 3          | 0.8          | 0.2           |
|              | 4          | 1.4          | 0.5           |

The same information can be shown using the matrix concept of using field values for **Quarter** to make extra columns:

| <i>State</i> | <i>Qtr 1</i> |               | <i>Qtr 2</i> |               | <i>Qtr 3</i> |               | <i>Qtr 4</i> |               |
|--------------|--------------|---------------|--------------|---------------|--------------|---------------|--------------|---------------|
|              | <i>Sales</i> | <i>Profit</i> | <i>Sales</i> | <i>Profit</i> | <i>Sales</i> | <i>Profit</i> | <i>Sales</i> | <i>Profit</i> |
| CA           | 1.1          | 0.3           | 1.0          | 0.3           | 1.1          | 0.4           | 1.3          | 0.5           |
| FL           | 1.3          | 0.4           | 1.1          | 0.3           | 0.8          | 0.2           | 1.4          | 0.5           |

As can be seen, the matrix concept makes the report shorter but wider.

## Terms used to define a matrix

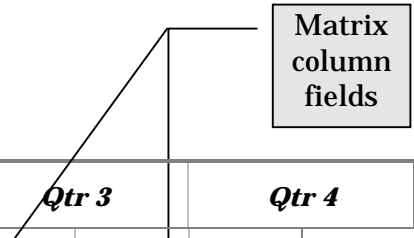
There are three components that describe a matrix report.

- ◆ Matrix column field
- ◆ Matrix column condition, and
- ◆ Matrix data field.

### Matrix column fields

These are the fields shown in repeated groups across each line. In the example there are two matrix column fields:

- ◆ Sales, and
- ◆ Profit.

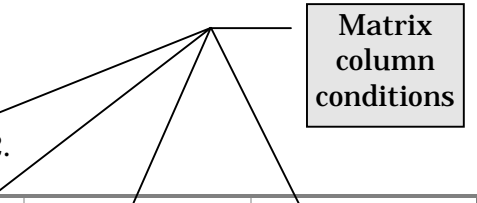


| <i>State</i> | <i>Qtr 1</i> |               | <i>Qtr 2</i> |               | <i>Qtr 3</i> |               | <i>Qtr 4</i> |               |
|--------------|--------------|---------------|--------------|---------------|--------------|---------------|--------------|---------------|
|              | <i>Sales</i> | <i>Profit</i> | <i>Sales</i> | <i>Profit</i> | <i>Sales</i> | <i>Profit</i> | <i>Sales</i> | <i>Profit</i> |
| CA           | 1.1          | 0.3           | 1.0          | 0.3           | 1.1          | 0.4           | 1.3          | 0.5           |
| FL           | 1.3          | 0.4           | 1.1          | 0.3           | 0.8          | 0.2           | 1.4          | 0.5           |

### Matrix column conditions

The column fields may be repeated in groups across the report line. Each group needs a condition to define when data from column fields is shown in that group. In the example there are four matrix column conditions.

- ◆ Qtr 1: Sales Month in range 1 to 3
- ◆ Qtr 2: Sales Month in range 4 to 6
- ◆ Qtr 3: Sales Month in range 7 to 9
- ◆ Qtr 4: Sales Month in range 10 to 12.



| <i>State</i> | <i>Qtr 1</i> |               | <i>Qtr 2</i> |               | <i>Qtr 3</i> |               | <i>Qtr 4</i> |               |
|--------------|--------------|---------------|--------------|---------------|--------------|---------------|--------------|---------------|
|              | <i>Sales</i> | <i>Profit</i> | <i>Sales</i> | <i>Profit</i> | <i>Sales</i> | <i>Profit</i> | <i>Sales</i> | <i>Profit</i> |
| CA           | 1.1          | 0.3           | 1.0          | 0.3           | 1.1          | 0.4           | 1.3          | 0.5           |
| FL           | 1.3          | 0.4           | 1.1          | 0.3           | 0.8          | 0.2           | 1.4          | 0.5           |

### Matrix data fields

These represent a single column of data. There will be a matrix data field for each combination of matrix column field with each matrix column condition. In the example there are eight matrix data fields.

- ◆ Sales for Qtr 1
- ◆ Sales for Qtr 2
- ◆ Sales for Qtr 3
- ◆ Sales for Qtr 4
- ◆ Profit for Qtr 1
- ◆ Profit for Qtr 2
- ◆ Profit for Qtr 3
- ◆ Profit for Qtr 4.

| <i>State</i> | <i>Qtr 1</i> |               | <i>Qtr 2</i> |               | <i>Qtr 3</i> |               | <i>Qtr 4</i> |               |
|--------------|--------------|---------------|--------------|---------------|--------------|---------------|--------------|---------------|
|              | <i>Sales</i> | <i>Profit</i> | <i>Sales</i> | <i>Profit</i> | <i>Sales</i> | <i>Profit</i> | <i>Sales</i> | <i>Profit</i> |
| CA           | 1.1          | 0.3           | 1.0          | 0.3           | 1.1          | 0.4           | 1.3          | 0.5           |
| FL           | 1.3          | 0.4           | 1.1          | 0.3           | 0.8          | 0.2           | 1.4          | 0.5           |

### Matrix rows

Unlike common spreadsheet implementations of matrices, there are no special matrix definitions relating to rows. The rows are governed by sort and summary specifications.

### Identifying matrix fields

Use the matrix QuickFilter to show the matrix fields in the DataCrafter. This shows several types of fields.

- ◆ XCNDnnnnnn: There will be one of these for each matrix column condition. These fields indicate if the condition is true or false. They are not normally used elsewhere in the report.
- ◆ XFLDnnnnnn: These are the matrix data fields. These fields will either be shown in layout, or used with summary fields for use within layout.
- ◆ Others (such as SUMnnnnnn): These are summary fields for the matrix data fields.

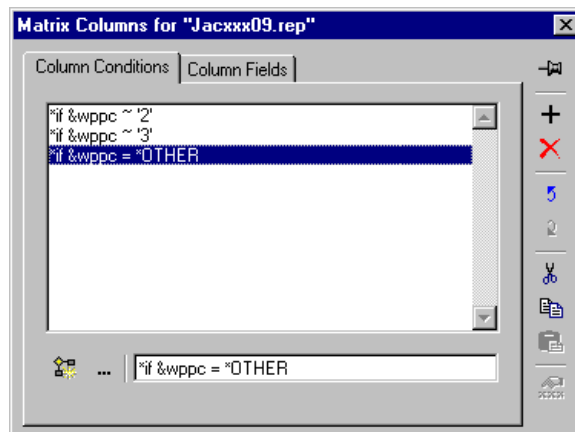
## Changing matrix definitions

**Note:** It is much simpler to use the ReportWizard to design or re-design your matrix reports. You may modify your matrix columns using the Matrix columns dialog. However, you should be familiar with the terms and concepts for matrix reports (refer to the *Terms used to define a matrix* section for further information).

One reason for using the Matrix columns dialog is defining more complex matrix column conditions than the ReportWizard allows.

Using the Matrix Columns dialog box you can set:

- ◆ conditions for making matrix columns (the Column Conditions tab)
- ◆ the fields shown within matrix columns (the Column Fields tab).



- √ You can see this dialog box by choosing the **Matrix Columns** option from the **Report** menu.

Use this dialog box to build fields for using with matrix columns for your report definition.

The Matrix Column dialog box has two tabs, which allow you to define matrix data fields. Each tab, described in the following sections, has a row of buttons along the bottom of the window to allow you to quickly set the specifications you want for your report.

You can use the data fields in setting many of the report specifications. Simply drag-and-drop the field you want from the DataCrafter into the dialog box and apply the specifications you need. Dragging fields here works in much the same way as in the layout window. If you drag-and-drop a field with the left mouse button, Jacana inserts the field into the dialog box. If you drag-and-drop a field with the right mouse button, Jacana displays a shortcut menu from which you can choose the field option you want. You can also see this menu by clicking on a field in this dialog box using the right mouse button.

The Matrix Columns dialog box has buttons down its right hand side that can help you build the matrix column fields. The buttons have the following actions.



toggles the Pinned status of the dialog. If pinned, when the escape key is pressed, the dialog will remain open, but focus will be passed to the Layout window. Close a pinned dialog using the standard Close Window button in the title bar.



adds the current field from the DataCrafter into this dialog box. Or you can drag-and-drop a field from the DataCrafter.



removes the current field or condition from the dialog box list.



'promotes' the current field or condition up the dialog box list.



'demotes' the current field down the dialog box list.



cuts the chosen field or condition from the dialog box list. This is then available for pasting to the Matix Columns dialog of another report.




copies the chosen field or condition from the dialog box list. This is then available for pasting to the Matix Columns dialog of another report



pastes a cut or copied field or condition.



displays the properties of the current field.

For help in this dialog, click help button  in standard toolbar, then click on the item you want help for.

The following description of the two Matrix Columns tabs describes how to create the various types of specification you can add to report definitions using the mouse. You can choose to use these buttons to do many of the same functions.

Any fields used or created using this dialog box are available using the QuickFilters in the DataCrafter.

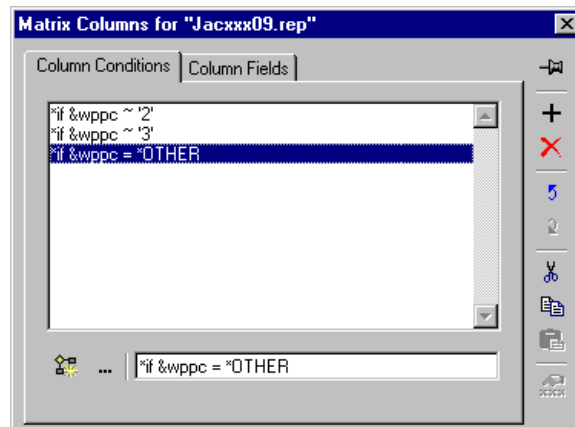
## Column conditions

Use this tab of the Matrix columns dialog box to add, change or delete column conditions.

Note: When column conditions are added, new matrix fields are defined in combination with matrix column fields. The matrix data fields are **not** added to layout or summarized unless the report is re-designed using ReportWizard.

To specify a Column condition:

- ✓ Click on the **Column Condition** tab. Jacana shows this dialog box.




- ✓ Drag-and-drop the field you want to use in the condition into the dialog box or press the New Condition button.



Restriction: All Matrix Column conditions must be based on the same field.

- ✓ The condition box shows a simple default condition. You can enter the condition in this box.

- √ Click on the **Condition Builder** button to build a condition.   
Jacana displays the **Condition Builder** dialog box (see *Condition builder* above).

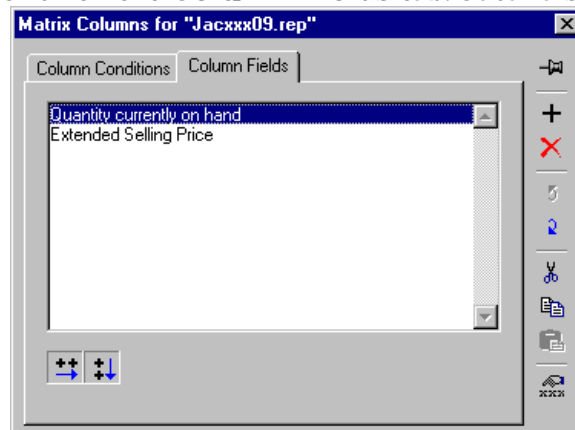
## Column fields

Use this tab of the Matrix columns dialog to add or delete column fields.

Note: When column fields are added, new matrix fields are defined in combination with column conditions. The matrix data fields are **not** added to layout or summarized unless the report is re-designed using ReportWizard.

To specify a Matrix Column field:

- √ Click on the **Column Fields** tab. Jacana shows this dialog box.



- √ Drag-and-drop the field you want available for matrix columns into the dialog box.
- √ Click on the button to choose:



total across the page. This creates fields for totaling the matrix rows



total down the page. This creates fields for totaling the matrix columns

## ▲ *Refining your report - appearance*

Jacana gives you a great deal of flexibility in determining how your report will look when it is run. In addition to having the ReportWizard and LayoutWizard features that can quickly set the overall look of the report you can tailor just about anything in the report just the way you want it. You can specifically set the:

- ◆ report sheet properties
- ◆ line properties
- ◆ attributes for individual fields.

This section covers each of these options.

### LayoutWizards

A LayoutWizard helps you speed up the layout of your report. You can choose how your report will appear.

To use a LayoutWizard:

- √ Choose the **LayoutWizard** option from the **Layout** menu. Jacana displays either:
  - ◆ the first LayoutWizard dialog box, or
  - ◆ the Choose Wizard dialog box.
- ➔ The Choose Wizard dialog is shown only if more than one Wizard is available, and the **Always use default LayoutWizard** option is NOT set.
- √ Jacana leads you through a series of dialog boxes that ask you questions about how you want your report to appear. These questions include asking you about the:
  - » output medium
  - » level of detail
  - » layout style
  - » fields to include
  - » report title.
- √ Click on the **Finish** button. Jacana re-designs the report layout based on the your answers.

## Setting the sheet properties

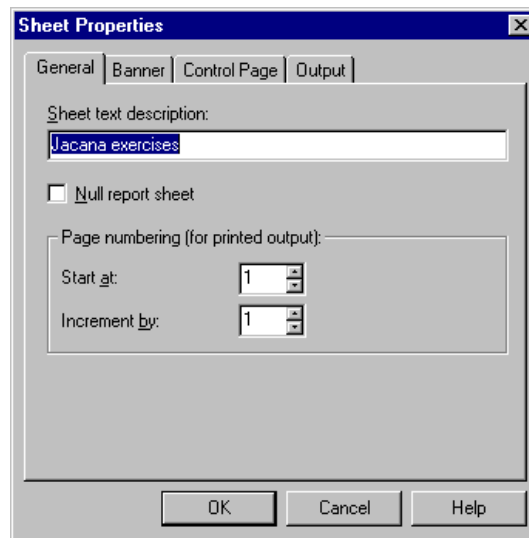
Reports can have up to twenty sections, which may even have different output methods. For example, a report may have a detail section and a summary section, or a report may produce a disk output and a printer output. The Report Properties option covers the settings for the entire report. Sheet Properties set how each of the sections or outputs appears.

The report sheet determines the overall look of your report section or output. It provides control over the report output, including specifying control and banner pages, attributes and changes to the output settings.

All sheets of a report share common report specifications other than page skipping. This includes sorting, selection, totaling, matrix, parameters and workfields. See *Refining your report - contents*

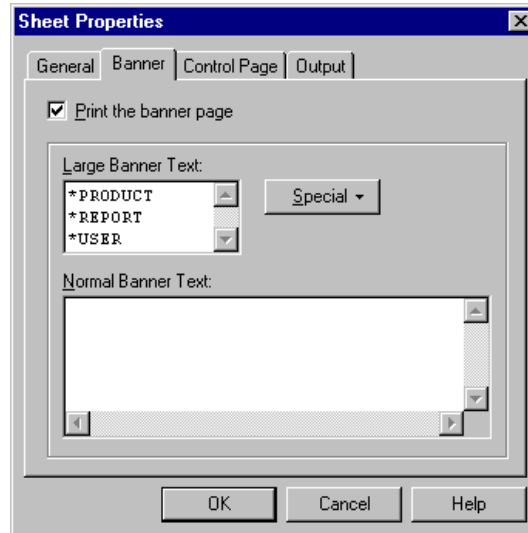
To display or change the sheet properties:

- ✓ Click on the Sheet Properties button or choose the **Sheet Properties** option from the **Layout** menu. Jacana displays the Sheet Properties dialog box.



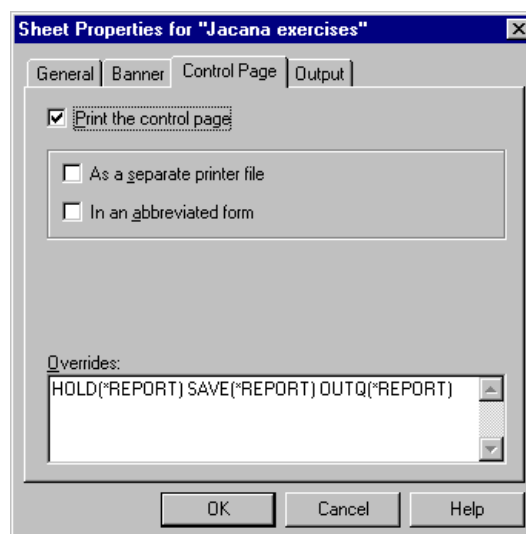
- ✓ Use the **General** tab to name the sheet. You can also choose to set this sheet to be the null report sheet. The null report sheet is used for any report-run that selects no records. That is, if when the report is run the values the user enters do not select any records the null report sheet will be produced. You may also set the page number starting value, and the page number increment for subsequent pages.

- √ Use the **Banner** tab to set how any banner page for this sheet is to appear. The banner page is the first page printed for the sheet. You can add or remove text for this page. You can also suppress the banner page by turning off the Print Banner Page checkbox.

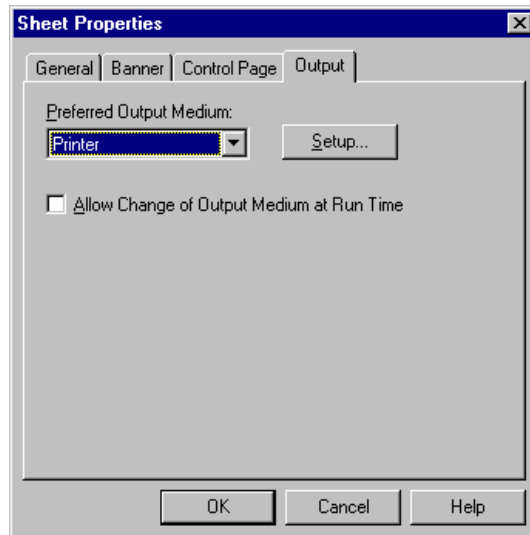


- √ Use the **Control Page** tab to set how the control page(s) for the sheet are to appear. The control pages show the selection criteria used, workfield definitions, run-time duration and the number of records selected for a report run. You can choose to make them separate and/or abbreviated. Abbreviated may be appropriate if there are many select/omit tests and/or workfields. You can suppress the control page by turning off the Print Control Page checkbox. You can also override print options.

Note: The host product may have limited overrides. The allowable override keywords are all shown with default values. Any other keywords will prevent saving the report to the host product.



- √ Use the **Output** tab to set the output medium to use for the sheet. Click the **Setup** button to make more specific output settings. For further details on output settings refer to the *Changing your output settings* section of this guide. You can also allow the user to choose which medium they want by choosing the *Allow change of output medium at run time* checkbox and set the printer overrides for the control page.



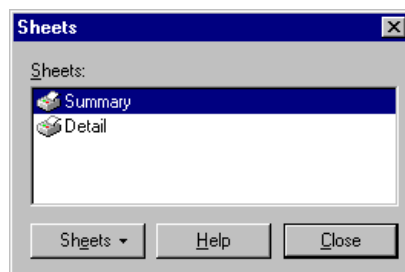
- √ Click **OK** to finish setting the report sheet properties.


## Adding sheets

You can add up to twenty report sheets to a report.

To add a sheet to your report definition:

- √ Choose the **Sheet** option from the **Report** menu. Jacana displays the Sheet dialog box.



- √ Click on the  button.
- √ Choose the **New** menu option.

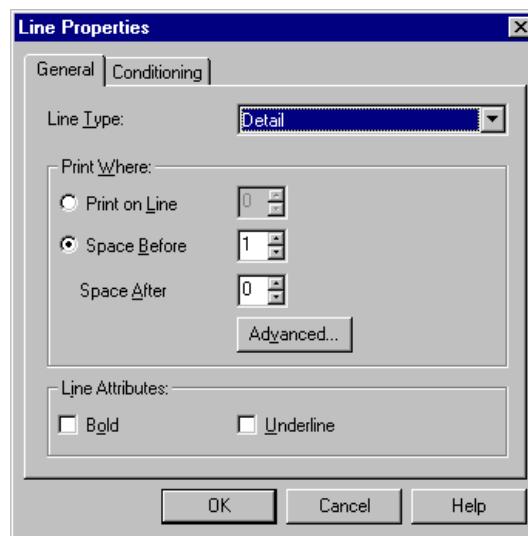
- √ Set the sheet properties (for further information on sheet properties, refer to the *Setting the sheet properties* section of this guide).
- √ Click **OK** to add the new sheet.

## Setting the line properties

Using the ReportWizard and/or LayoutWizard functions can set much of the report's appearance. But you can enhance your report to exactly meet your needs by modifying the appearance of individual lines.

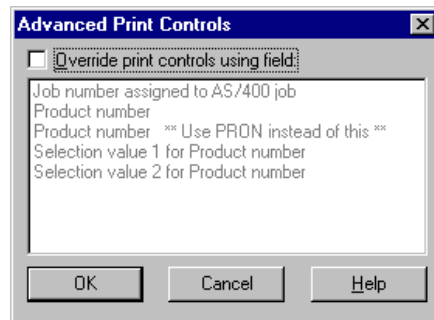
To set the line properties for the current line:

- √ Click on the line in the layout window you want to set properties for.
- √ Click on the Line Properties button or choose the **Line...** option from the **Layout** menu. Jacana displays the Line Properties dialog box.



- ➔ If you click on the Line Properties button or choose the **Line...** option and the current line is a 'space' line between two print lines, Jacana asks if you want to convert this space line into a print line. Click on the **Convert** button to convert this line or click on the **Cancel** button and re-select the line you want to set properties for.

- √ Use the **General** tab to:
  - ◆ change the type of report line being used (for further information on report line types, refer to the *Report line types* section below)
  - ◆ set the line number this line is to appear/print on the page
  - ◆ set the number of blank lines before and/or after this line
  - ◆ set the line to appear bold and/or underlined.
- ➔ You can use the layout toolbar buttons to set some of these line attributes. For further information, refer to the *Toolbars, buttons and menus* section of this guide
- √ Click on the **Advanced** button to override print controls. Jacana displays the Advanced Print Controls dialog box. To override print controls, click on the checkbox and choose the field you want to use to override the print controls for this line. Click **OK** to accept your changes.



- ➔ A print control field is six digits long. The format of the field is:

| Position | Line control                 | Value                |
|----------|------------------------------|----------------------|
| 1-2      | Skip to line before printing | Absolute line number |
| 3-4      | Skip to line after printing  | Absolute line number |
| 5        | Space before printing        | 0-3                  |
| 6        | Space after printing         | 0-3                  |

Blanks are not allowed. Use 0 (zero) if the line control is not used

This feature is useful if line spacing should vary, e.g. to emphasize where the quantity on hand is less than the reorder level, you could include extra spacing by:

- ◆ defining a calculated field like this:

| <i>Condition</i> | <i>Expression</i> |
|------------------|-------------------|
| QOHD < QROL      | '000022'          |
| else             | '000011'          |


- ◆ using the calculated field in the override print controls.

√ Use the **Conditioning** tab to:

- ◆ print a line always or only if a specified condition is met. If you specify a condition, that condition must be met before a line is printed. For example, you might want a line to print only if a particular field or total is greater than a certain value.
- ◆ print data on the next available line on the page or force a page break if it is close to the bottom of the page. You can set how close to the bottom of the page this line may appear before forcing a page break.



√ To specify a condition, you may

- ◆ type a condition in the condition box,
- ◆ click on the list pull-down to select from conditions used elsewhere in the report,
- ◆ click on the Condition Builder button  to build a condition.

For further details on conditions, refer to *Condition builder* in the *Refining your report - contents* section of this guide.

√ Click **OK** to confirm your line settings.

### Report line types

The report layout is made up of a series of report lines. A report line can contain data from the database, identification labels, text and/or space.

The type of report line controls when the line appears in the output. A report can contain the following types of report lines:

- ◆ *Page header* lines appear at the top of every page or screen of output.
  - ◆ *Column heading* lines also appear at the top of every page or screen of output, after the header lines. They describe columns of data.
  - ◆ *Footer* lines appear to bottom of every page or screen of output.
  - ◆ *Detail* lines appear between the column header and the footer lines. They contain detailed information from the database. A detail line is produced for each record included in the output. This is usually the bulk of the report - it is the records you have extracted from the database.
  - ◆ *Sort* lines appear between the column header and the footer when there is a change in a particular sort field. They often contain summary information such as totals. You can specify both leading and trailing sort lines. Leading sort lines are included in the output before the data they summarize, i.e. detail lines. Trailing sort lines follow the data they summarize. Sort lines can include *report level* lines and *change of* lines A *report level* line is a level of sorting e.g. grand totals. *Change of* lines are shown as *change of <sort field name>*, e.g. Change of Warehouse Identifier.
  - ◆ *Report leader* lines occur once at the top of each spool file, after the banner page. They can contain information such as printer control commands.
  - ◆ *Trailer* lines appear once at the end of each spool file. Similarly to leader lines they can contain information such as end of job information, printer control commands, e.g. to reset the printer. They appear as the last print line in the spool file.
- √ To change the current line type either:
- » choose a new line type from the drop-down list on the layout toolbar
  - » click on the Line Properties button, or
  - » choose the **Line...** option from the **Layout** menu.

- ➔ To see line types for each line in page layout, use **Show Line Types** from the **View** menu.  
Move the cursor over the line between the line types margin and your report layout to resize the line types margin.

## Setting a field's appearance

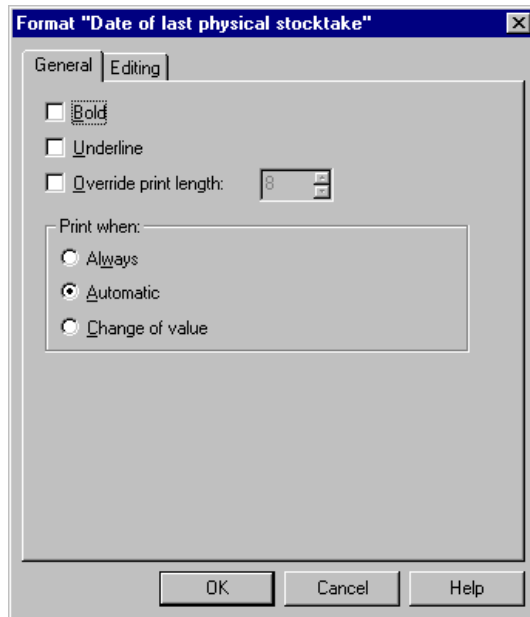
Sometimes you want to change the appearance of a field in your report. For any field in the report output, Jacana lets you:

- ◆ change font attributes for bold and underline,
- ◆ change its print length,
- ◆ make it print on change of value or always,
- ◆ apply an edit or transformation.

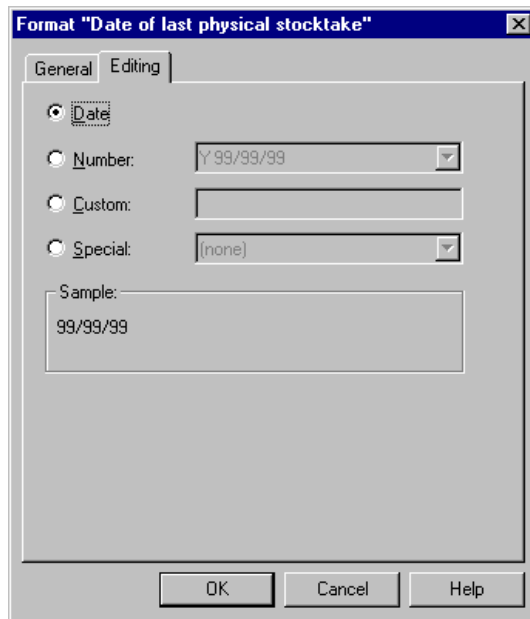
To change the appearance of a field:

- √ Find the field in the layout window.
- √ Click on the field.
- √ If you want to make the field bold, click on the **Bold** button or choose the **Bold** option from the **Layout** menu.
- √ If you want to underline the field, click on the **Underline** button or choose the **Underline** option from the **Layout** menu.
- ➔ For other changes, use the shortcut menu.
- √ Use the right mouse button to click on the field in the layout window. Jacana displays a shortcut menu.
- √ Choose the **Format Field** option. Jacana displays the **Format** dialog box, which has two tabs:

### The **General** tab ...



### and the **Editing** tab ...



Use these dialog boxes to set or change bolding or underlining, print length, print on change and edits for this field.

## ▲ *Printing your report definition layout*

### Previewing your report definition layout

Jacana shows the layout of your report definition in the layout window. This is very similar to how your report definition layout will appear if you print it. However, you can see a more accurate preview of how the report definition layout will be printed.

To print preview your report definition layout:

- √ Click on the Print preview button or choose the **Print Preview** option from the **File** menu. Jacana displays the Print Preview window showing your report definition layout.
- √ Use the buttons along the top of the window to:

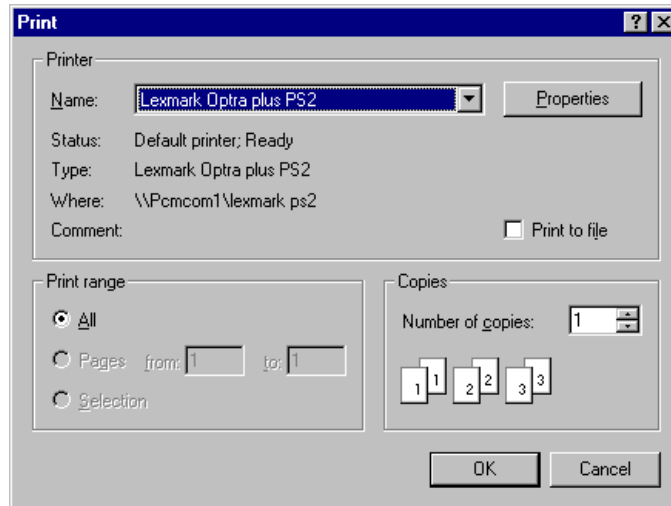


- ◆ print your report definition layout
- ◆ see the next page of your report definition layout
- ◆ see the previous page of your report definition layout
- ◆ see either one page or two pages at a time
- ◆ zoom in
- ◆ zoom out
- ◆ close the Print Preview window.

## Printing your report definition layout

To print your report definition layout:

- √ Click on the **Print** button or choose the **Print** option from the **File** menu. Jacana displays the Print dialog box.  
(Note: the dialog shown will depend on the printer you are using).



- √ Set the print options you want.
- √ Click **OK** to print your report definition layout.
- ➔ You may need to check or change your print setup. Use the **Print Setup** option from the **File** menu to check the setup.

## ▼ *Using Jacana - Advanced tasks*

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This section describes how to use Jacana to perform advanced tasks. These are tasks you may only do occasionally and include how to:

- ◆ use filters to choose fields
- ◆ check the data source for a report
- ◆ change the field properties
- ◆ change the report properties
- ◆ change the report output settings
- ◆ change your data source or server
- ◆ create report templates
- ◆ edit the run-time interface prompts.

### ▲ *Using filters*

Jacana allows you to filter at various levels. You can filter the fields from the data source into the picking list. You can also use QuickFilters to choose what report definition fields are shown in the DataCrafter.

To make the picking list easier to handle you can filter fields into the picking list first. This means you don't have to scroll through a vast list of fields when you know you only need certain fields.

You can use either:

- ◆ fully specified filters, or
- ◆ QuickFilters.

The picking list filter lets you control the fields shown in the picking list from the data source. The QuickFilters let you choose which report definition fields are shown in the DataCrafter.

➡ Use the buttons on the data toolbar to filter your fields.

## Using QuickFilters

QuickFilters let you filter fields with just one mouse click. Each QuickFilter will show just that type of report definition field in the DataCrafter.

To quick filter the report definition fields:

- √ Click on the QuickFilter button you want or choose the **QuickFilter** option from the **Data** menu. The QuickFilters available are:



summary fields



calculated fields



selection value fields



matrix fields




parameter fields



standard fields.


- √ Jacana lists the filtered fields in the DataCrafter.

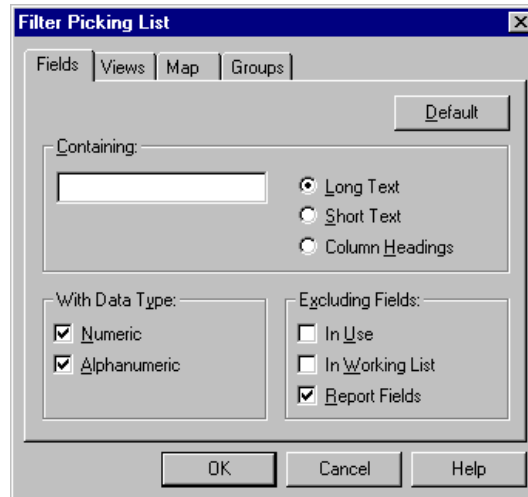
- ➡ Use the  button to limit the list of summary fields by type and/or sort level.

## Filtering the picking list

Sometimes you want more flexibility in filtering the fields from the data source. Jacana lets you do this too. Use this option to control which fields are included in the picking list from the data source.

To filter your data fields into the picking list:

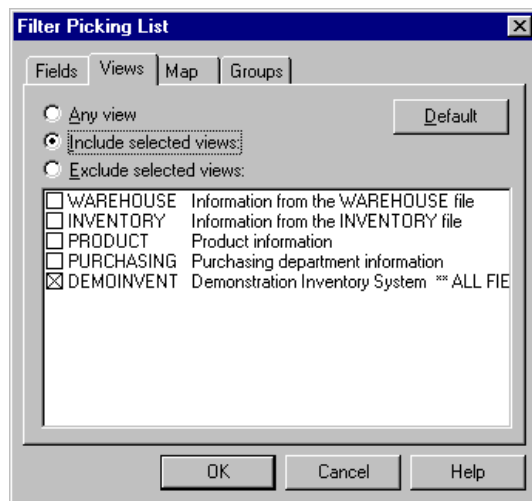
- √ Click on the Filter Picking List button  or choose the **Filter Picking List** option from the **Data** menu. Jacana displays the Filter Picking List dialog box.



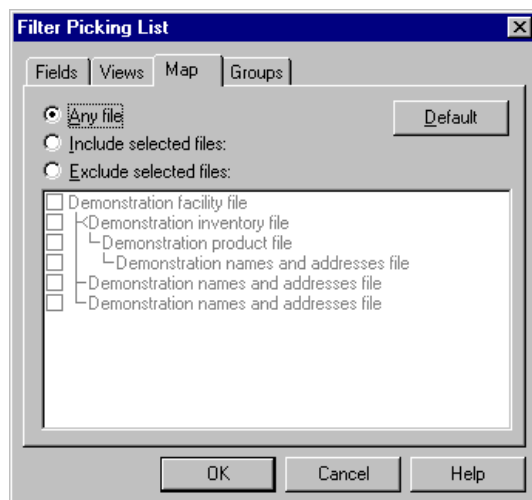
- ➔ You can set the filter criteria from one or more of the tabs in this dialog box.
- √ Use the **Fields** tab to search for fields:
  - ◆ containing the text you enter in the containing box in either the long description, short name or column heading
  - ➔ Use the **Pick Fields Containing** edit box in the DataCrafter as a shortcut to this feature.
  - ◆ with a particular data type
  - ◆ excluding fields currently in use, in the working list or report fields.
    - » *In use* fields are those fields used in the report, either in the layout or in report specifications.
    - » *In working list* fields are those fields listed in the working list.
    - » *Report fields* are those fields that do not exist in the data source, i.e. fields created in the report definition, e.g., workfields, parameters, conditions, select/omit and summary fields.

Click on **Default** to choose all fields except for the report fields.

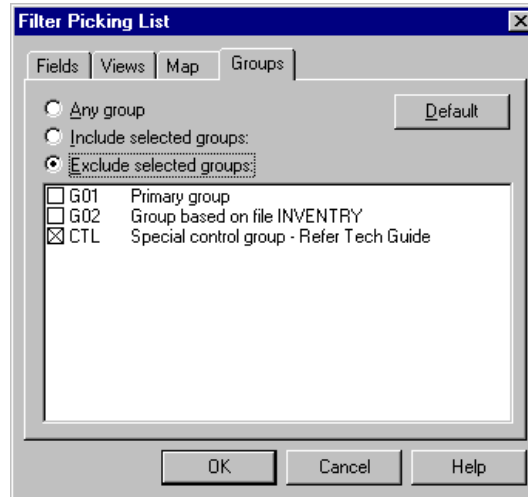
- To list all fields, leave the containing box blank, check that both data type boxes are checked and that none of the exclusion fields are checked.
- All four tabs are used for filtering. If you have trouble finding a field, check all four tabs.
- √ Use the **Views** tab to choose particular data user views to include or exclude. Views are selections of the server product's data dictionary tailored to suit specific users or purposes. Click on **Default** to choose just the selected or current view(s).



- √ Use the **Map** tab to choose particular data files to include or exclude. A map is a graphic representation of the relationships between the data files. Click on **Default** to choose the any file option.



- √ Use the **Groups** tab to choose particular data groups to include or exclude. A group contains the fields from files that are linked by 1:1 relationships.  
Click on **Default** to choose all groups except the control group.



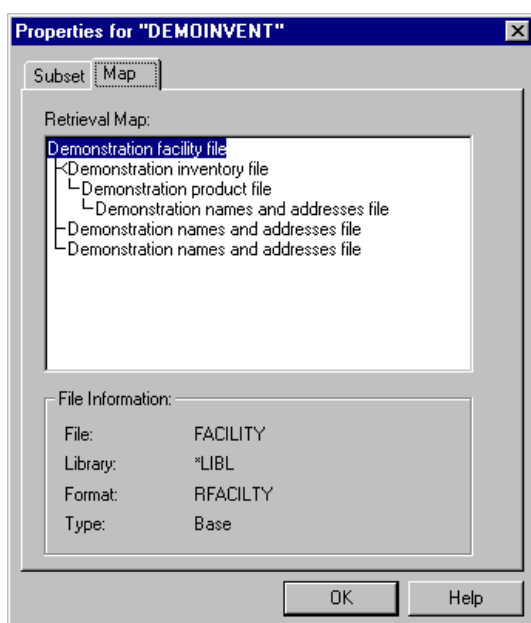
- √ Click **OK** to filter the data fields. Jacana reduces the picking list to include only those fields matching your criteria.

## ▲ *Checking your data source*

Jacana lets you check which data source you are using. You can see where data has come from and check the properties of an individual field. For further details on checking field properties refer to the *Checking the field properties* section of this guide.

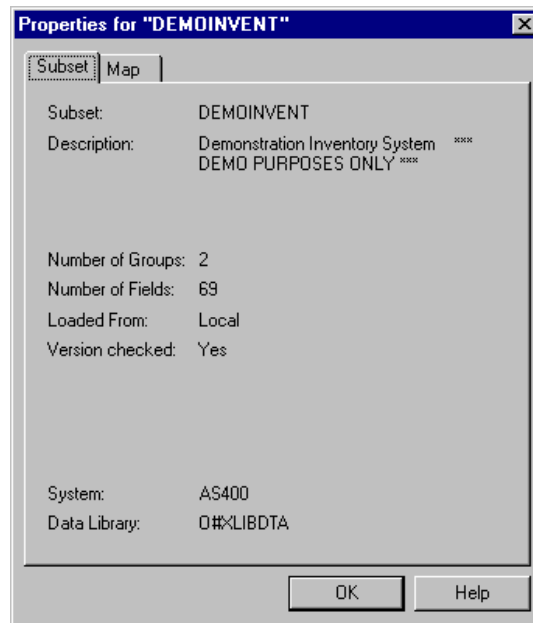
To see what data source your report is using:

- ✓ Click on the Data Source button  or choose the **Source...** option from the **Data** menu. Jacana displays the Data Source dialog box.



- ✓ Use the **Map** tab to see the retrieval map for the data. This shows the relationships between the data files that make up the data source. For each file you can see the file name, library, format and type.

- √ Use the **Subset** tab to see the data subset that is currently being used. This tab shows the name and description of the subset, the number of groups and fields, where it was loaded from and whether it has been version checked (that is, the local version has been checked against the current AS/400 version). The tab also shows which system and data library is to be used.  
**NOTE:** If the data source is a database file, the tab is named **Database file** and differs slightly.




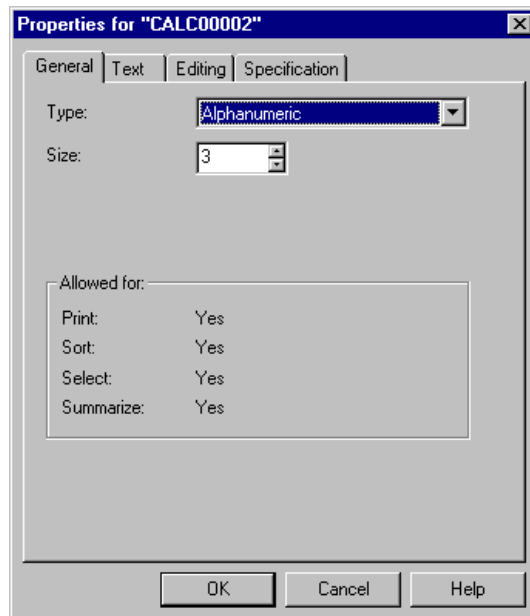
- √ Click **OK** to continue.

## ▲ *Checking the field properties*

Jacana lets you see and/or change the properties of any field in your report definition.

To see the properties for a particular field:

- √ Click on the field, either in the DataCrafter or in the layout window.
- √ Click on the Field Properties button  or choose the **Field properties** option from the **Layout** menu. Jacana displays the Properties dialog box.  
NOTE: When displaying properties of report fields, you can use the **General**, **Text** and **Editing** tabs to change some of the properties of report fields. You cannot change properties of fields from the data source. When showing properties of report fields, an additional tab is shown named **Specification**, which describes how the report field is defined.



- √ Use the **General** tab to see and/or change basic information for this field. The information shown includes the field type, size and whether the field can be used for printing, sorting, selecting and summaries.

- √ Use the **Text** tab to see and/or change the identification details for this field. The information shown includes a description of the field and the text used as a label or column heading for this field.

The screenshot shows a dialog box titled "Properties for 'CALC00002'". It has four tabs: "General", "Text", "Editing", and "Specification". The "Text" tab is selected. The dialog contains the following fields:

- Description: Reorder? YES/NO
- Left Text: Reorder? YES/NO
- Right Text: Reorder? YES/NO
- Headings: Reorder?
- YES/NO
- (Empty field)

At the bottom, there are three buttons: "OK", "Cancel", and "Help".

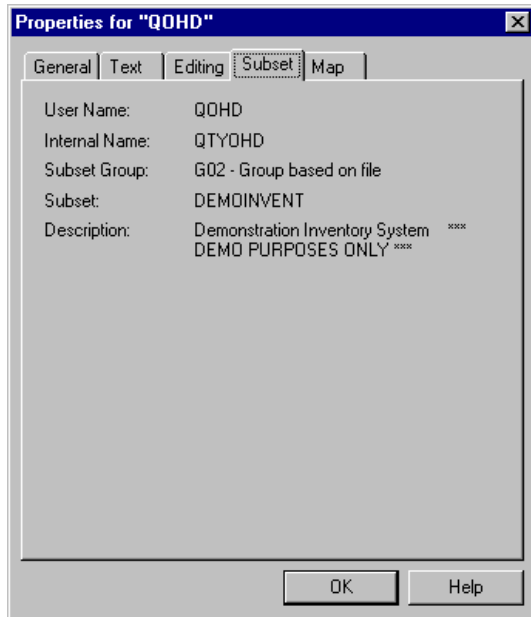
- √ Use the **Editing** tab to see and/or change edit codes for this field. These edit codes and macros can be used to alter how the field is printed in the report output.

The screenshot shows a dialog box titled "Properties for 'CALC00003'". It has four tabs: "General", "Text", "Editing", and "Specification". The "Editing" tab is selected. The dialog contains the following fields:

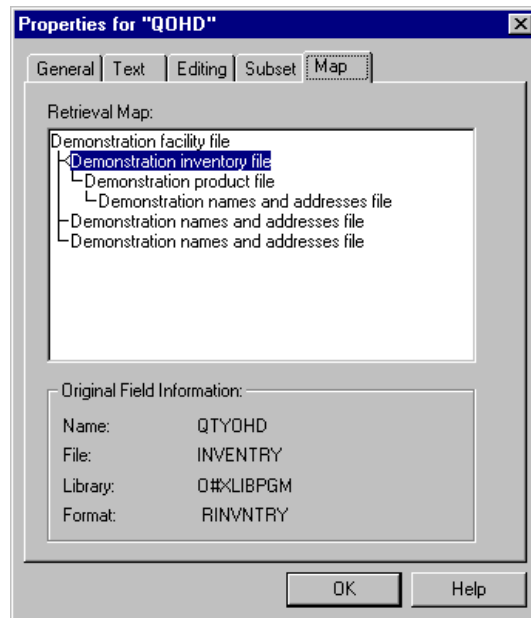
- Date
- Number: L 99999.99-
- Custom:
- Special: [none]
- Sample: 99999.99-

At the bottom, there are three buttons: "OK", "Cancel", and "Help".

- √ Use the **Subset** tab to see the subset details for this field. The information shown includes the user name, internal name, subset group, subset and subset name that this field comes from.



- √ Use the **Map** tab to see data retrieval map details for this field. This shows the relationship between the data files in the data source. The information shown here includes the original name, file, library and format of the field.

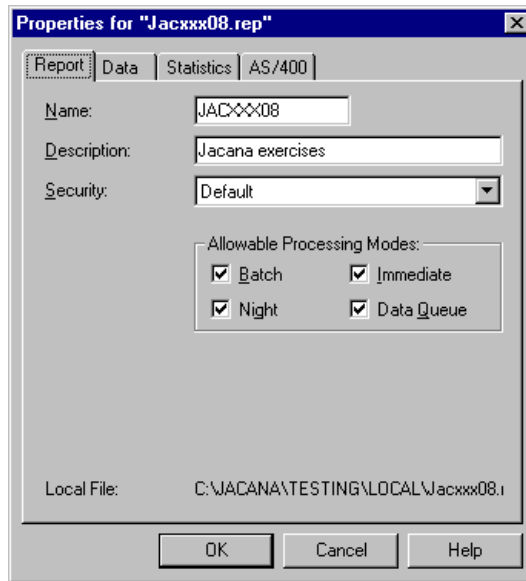


- √ Click **OK** to continue.

## ▲ *Checking the report properties*

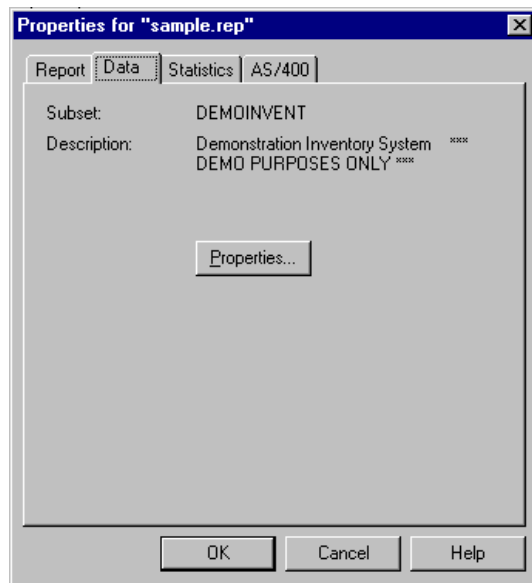
To see the properties for a report:

- √ Click on the Report Properties button  or choose the **Properties...** option from the **Report** menu. Jacana displays the Report Properties dialog box.

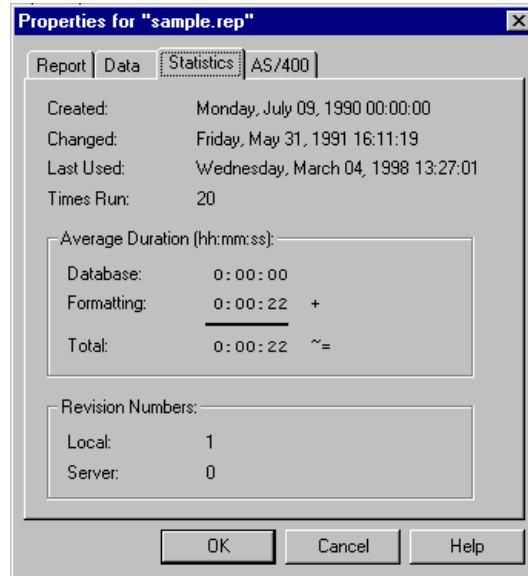


- √ Use the **Report** tab to see or change:
  - ◆ user name (this is the user's name for the report when saved on an AS/400)
  - ◆ report description
  - ◆ security (access rights - are other AS/400 users allowed to run, change or delete this report?). Note: This option is only available for new reports. If the report has already been saved to the server, use the security features of the host product to change the authorities.  
The security options are:
    - » Default - other users access to the report is determined by the default access nominated by the host product
    - » Other users can run this report
    - » Other users can run, change or delete this report
    - » Other users have no access to this report.

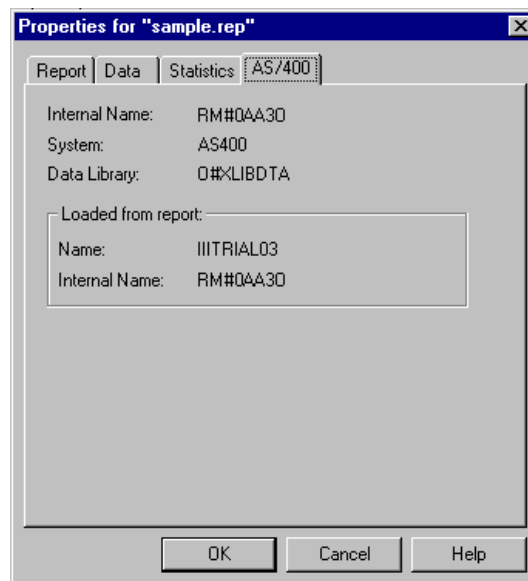
- ◆ processing modes (these control the AS/400 environment in which a report will run. For further details, refer to your server product documentation.)
  - ◆ local file name (the name of the file used to save this report definition locally on your PC).
- √ Use the **Data** tab to see name and description of the data. Click on the **Properties** button to see the data source details. For further information on this refer to the *Checking your data source* section of this guide.



- √ Use the **Statistics** tab to see the creation and run statistics for this report. These include the dates on which this report was created, last changed and last used in addition to average duration for running the report.



- √ Use the **AS/400** tab to see AS/400 details for this report, including the internal name, system and data library details. This is useful if you are saving report definitions locally (on your PC) and are using reports from different sources.



- √ Click **OK** to continue.

## ▲ *Changing your output settings*

A report can be created to produce output for a printer, a screen or a disk file. You must specify the output medium you want your report to use. A report normally has one specific output medium that you want it to use. However, it can be output to another medium.

Each output medium has different settings that you can control, for example you should specify how many lines you want per page on a printer report.

To see or change the output settings for your report:

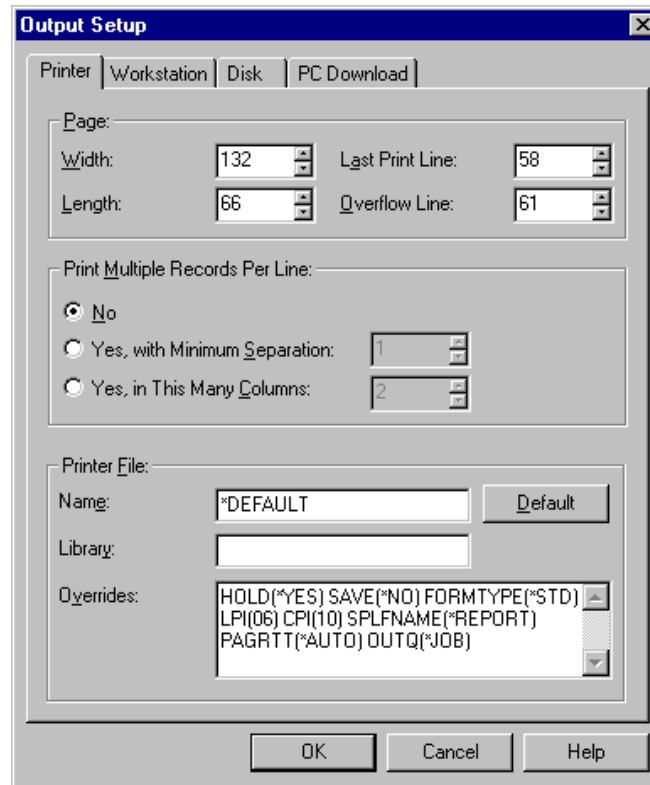
- √ Click on the Sheet Properties button or choose **Sheet properties** from the **Layout** menu. Jacana displays the Sheet properties dialog box.
- √ Click on the **Output** tab. Jacana shows the current output settings.
- √ Choose the output medium you want from the Preferred output medium drop-down list.
- √ You can see or change the settings for this output medium by clicking on the **Setup** button.
- √ You can allow the user to change the output medium when they run the report. To do this, click on the checkbox marked Allow change of output medium at run time.
- √ Click **OK** to accept the changes.
- ➔ You can change the settings for each output medium. When the user selects an output medium at run time, the settings you entered will be the default output settings for that medium.

To see or modify the settings for your current output medium, follow this procedure.

- √ Click on the Output Setup button or choose **Output setup** from the **Layout** menu. Jacana displays the Output setup dialog box. There is a different tab for each output medium.

The PC download tab gives options for formatting the report output into one of several PC-based application formats, e.g. for a spreadsheet or database.

## Printer



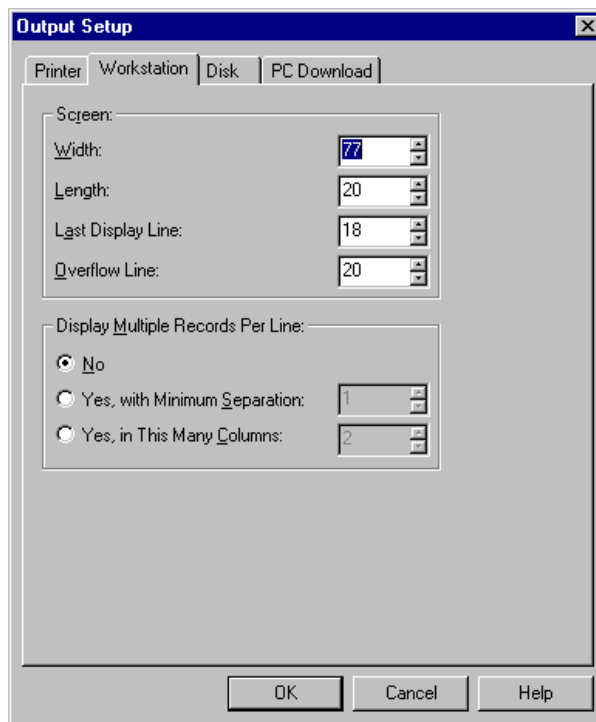
Use this tab to specify how the report will be printed.

- √ Use the first section of the tab to set:
  - ◆ the length and width of the printed area
  - ◆ the last line to print DETAIL or SORT lines on
  - ◆ the last line to print on.
- √ Use the second section of the tab to specify how many records to print to a line, including the spacing between records, e.g. for printing labels
- √ You can also direct printer output to printer files. Use the last section of the tab to name the:
  - ◆ printer file
  - ◆ library, and
  - ◆ any overrides you require.

**Note:** The host product may have limited overrides. The allowable override keywords are all shown with default values. Any other keywords will prevent saving the report to the host product. Click on the **Default** button to use the default printer file name.

- ➡ For further details about printer file settings, refer to your server product documentation.
- ✓ Click **OK** to accept your output settings.

## Workstation

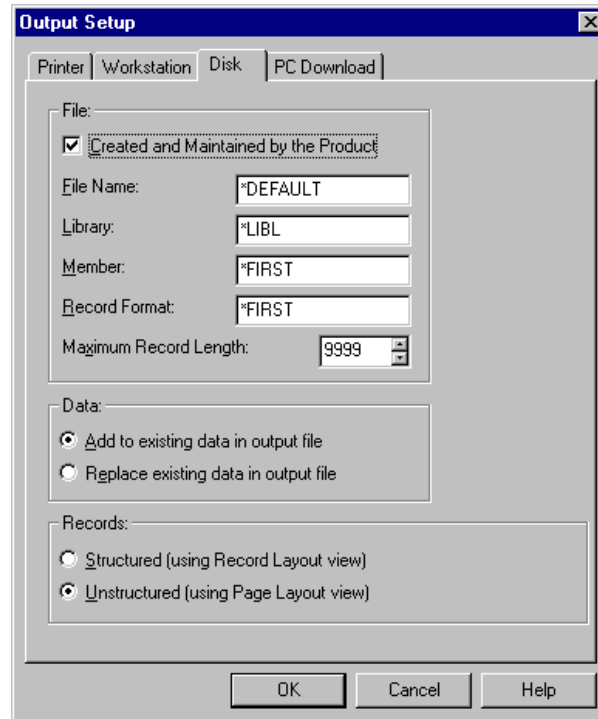


Use this tab to specify how the report output should appear on a workstation screen.

- ✓ Use the first section of the tab to set:
  - ◆ the length and width of the screen
  - ◆ the last line to display **DETAIL** or **SORT** lines on
  - ◆ the last line to display information on.

- √ Use the second section of the tab to specify how many records to show on a line, including the spacing between records.
- √ Click **OK** to accept your output settings.

## Disk



Use this tab to specify how the report output should be saved as disk output. Definitions for disk file output should be detail reports or simple summary reports. Reports that are designed to produce output for other output media should not be used to produce disk file output.

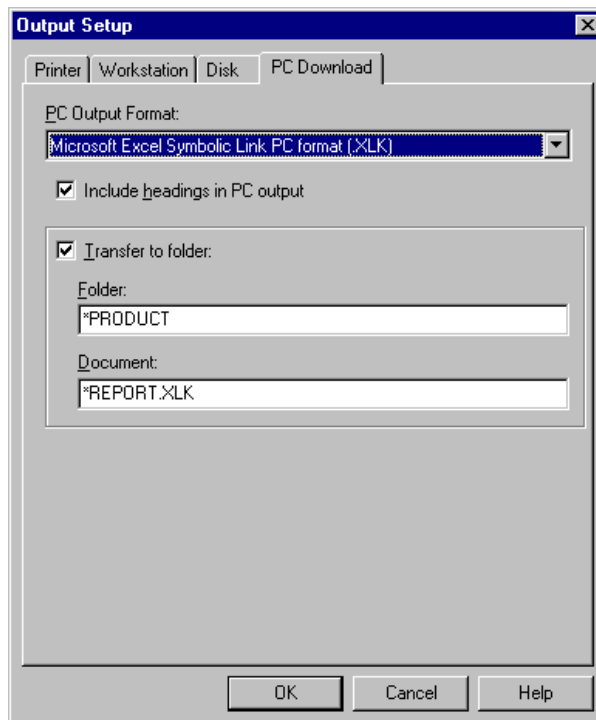
- √ Use the first section of this tab to set:
  - ◆ names for the file, library, members and records
  - ◆ maximum length of records.

Click on the checkbox if these names are to be set and maintained by your server product. The server product deletes and re-creates a maintained file each time the report is compiled.

- √ Use the second section of this tab to choose whether you want to:
  - ◆ add (append) the data to any existing data or
  - ◆ replace (overwrite) any existing data.

- √ Use the last section of the tab to choose the format to save the data in. You can choose AS/400 native format with or without field descriptions.  
'With field descriptions' inserts the field names and delimits the entries in the output file.  
'Without field descriptions' creates a file with no field names and each record is essentially a single un-delimited entry.
- √ Click **OK** to accept your output settings.

## PC Download



Use this tab to specify how the report output should be formatted to be suitable for PC applications such as spreadsheets, word processors or other data processing applications.

- √ Choose the PC output format that is suitable for use by your PC application. Often there will be a PC format that contains the name of your PC application. If not, the format *Comma Separated Variables* is suitable for importing to many applications. Refer to your host product for details of setting up macros specific for a PC application.
- √ Click on the transfer to folder option to cause output from this report to be transferred to AS/400 folders ready for access by your PC.

- √ Use the folders section of this tab to name the AS/400 folder where the output is to be stored. A PC may then access the AS/400 folder via shared folders or mapped network drives.
- √ Click **OK** to accept your output settings.

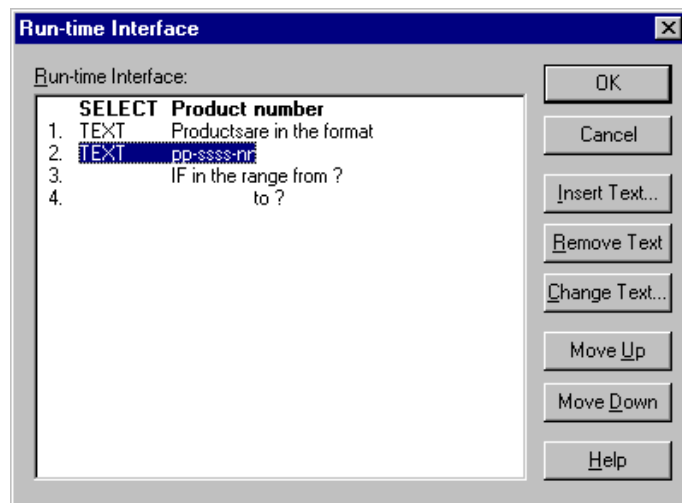
## ▲ *Editing the run-time interface*

When the report definition is run on your AS/400 the user may be asked to enter various select/omit values and/or run-time parameters.

This option allows you to add text to the prompts for the select/omit and parameter specifications you included in your report definition. For further details on specifications refer to the *Refining your report - contents* section of this guide.

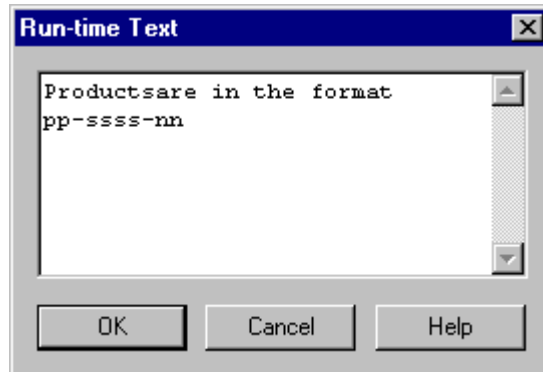
To edit the run-time interface text:

- √ Click on the Run-time interface button or choose the **Run-time interface** option from the **Report** menu. Jacana displays the Run-time interface dialog box. This lists all the current run-time prompts the user will be shown.



- √ The items are shown in the order they will be shown to the user at run-time. You can move individual lines of text or entire tests, e.g. select criteria. Click on the **Move up** button to move an item up the list or click on the **Move down** button to move an item down the order.

- √ Click on the **Insert text** button to add text that may help a user enter a run-time value, i.e. you can provide an explanation as to what value is required. Jacana displays the Run-time text pop-up.



Enter your prompt text. Click **OK** to return to the Run-time interface dialog box.

- √ Click on the **Change text** button to edit your prompt text. Jacana displays the Run-time text pop-up. Enter your prompt text. Click **OK** to return to the Run-time interface dialog box.
- √ Click on the **Remove text** button to remove the current (highlighted) line of text. You can only remove text lines, not the request for a run-time value.
- √ Click **OK** to accept the run-time interface settings.
- ➡ To change or remove a test, e.g. a select/omit test or a run-time parameter, use the Specifications dialog box. For further details, refer to the *Refining your report - contents* section of this guide.

## ▲ *Using report templates*

Jacana uses report templates when you create a new report definition. The default report template (JACANA.RET) specifies default heading and footer lines containing:

- ◆ report name
- ◆ report title
- ◆ page number
- ◆ date and time of report production.

Additionally, the report template contains default values for output settings and other report properties.

### Creating a report template

You can create your own report template. To create a template:

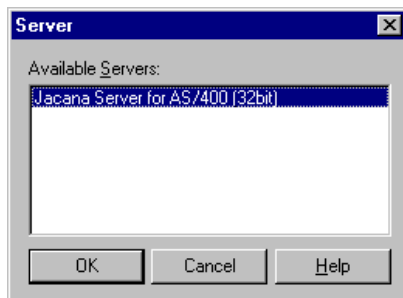
- √ Design a report layout as you would for a normal report definition.
- ➔ Only use fields from the Control Group. If you use any other fields, they will not be saved in the report template.
- √ Choose **Save As** from the **File** menu.
- √ Choose the **Local** tab to save this template on your PC.
- √ Check disk drive and directory are correct and enter a file name.
- √ Choose the Jacana Report Templates (\*.ret) option from the Save File As Type drop-down list.
- √ Click **OK**. Jacana saves your report template.
- ➔ Jacana currently uses just one template. This template is specified in the system settings. If no template is specified, Jacana uses the JACANA.RET template in the Jacana directory. For further information on changing system settings, refer to the online help for the Jacana options.

## ▲ *Changing your server*

When you start Jacana it automatically connects to the system and data library you last used. Sometimes you may want to change which server or system is used.

To change your server:

- √ Choose **Server** from the **File** menu. Jacana displays the Server dialog box listing the servers your router has been configured for.



- √ Choose the AS/400 server you want to use.
- √ Click **OK** to use this server. Jacana accesses that server.
- ➔ You can also change your data source, including the server, when you start a new report definition. For further details refer to the *Creating a new report definition* section of this guide.

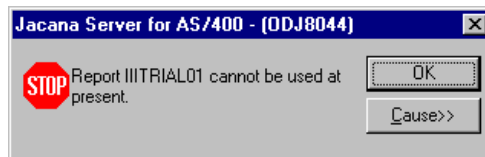
## ▼ *Trouble-shooting*

---

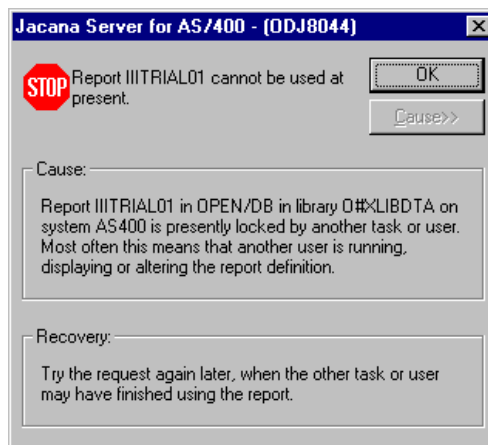
This section provides information on error messages you may encounter when using Jacana and information about Jacana's version checking.

### ▲ *Messages from the server product*

When you get a message from the server product, it may be an information message that is shown in the status bar or it may be shown in a dialog box. Messages shown in a dialog box tend to be more important and appear like this:



- √ Click on the **Cause** button to see an explanation of the message and possible solutions.



## ▲ *Other messages*

The following types of problems may cause other error messages.

### Missing products

Check that you have installed all the necessary software. For further details, refer to the *Preparing for installation* section of this guide.

### Incompatible levels

Check that you have installed the appropriate versions of all the necessary software. For further details, refer to the *Preparing for installation* section of this guide.

### Insufficient memory

Check that your PC has the necessary configuration or reduce the number of active applications.

For details on required hardware configuration, refer to the *Preparing for installation* section of this guide.

### Router not loaded

The router is the communications software that allows your PC to communicate with the AS/400. Before starting Jacana, check that a suitable router has been started. Suitable routers include:

- ◆ Client Access
  - ◆ NS/Router.
- ➡ For further information on Jacana and solving errors, refer to the on-line help.

## AS/400 not responding

If the AS/400 is not responding, check the following:

- ◆ is the PC currently connected to the AS/400?
- ◆ is the AS/400 active?
- ◆ have you started the router software to connect to the AS/400?
- ◆ is the Partner program name correctly set? To change the Partner program, refer to the Jacana Administrator.
- ◆ is the connection setting correct? To change the connection, choose the **Server** option from the **File** menu.
- ◆ are there any messages on the AS/400 operator's message queue?

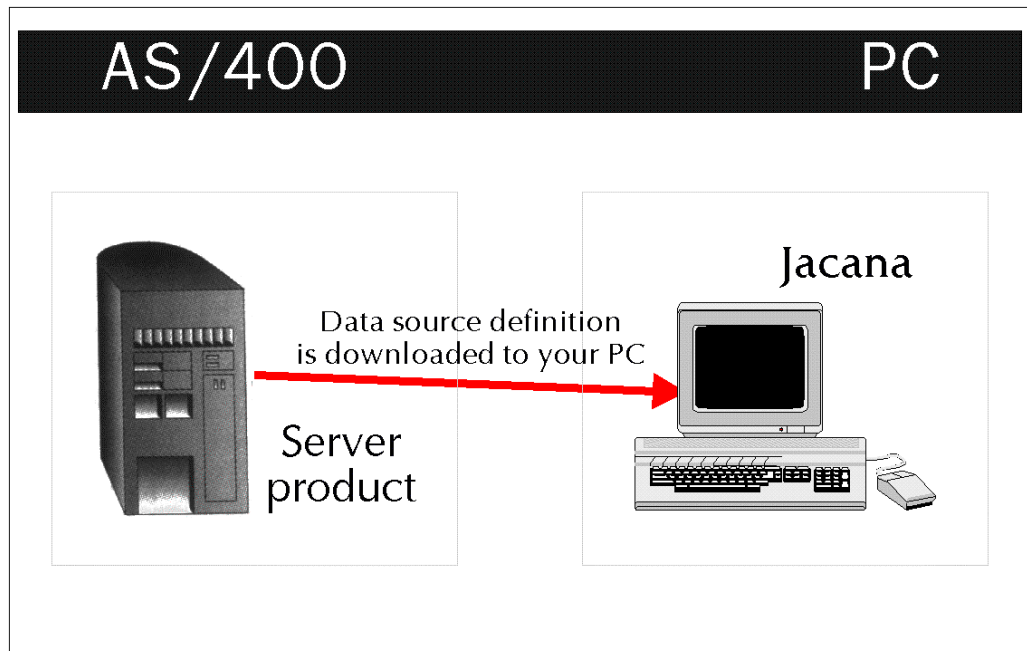
## Unlicensed product

Refer to the *Licensing Jacana* section of this guide.

## ▲ *Version checking*

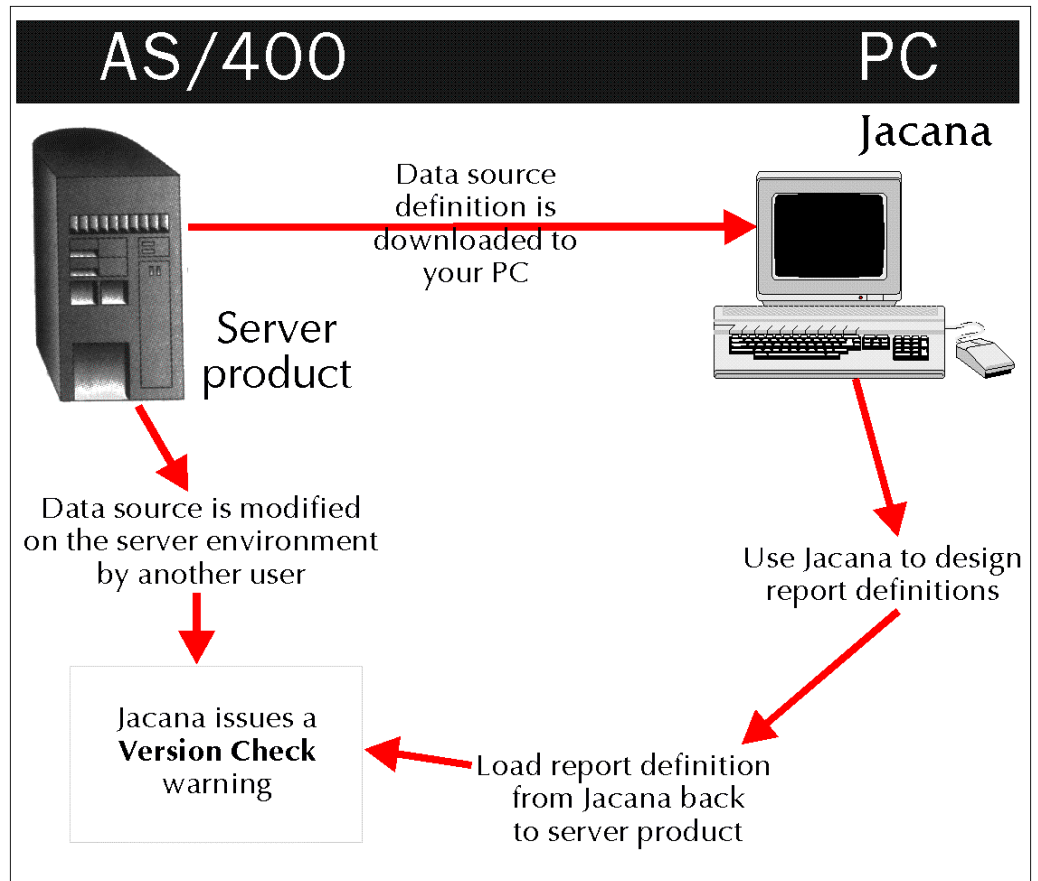
The reporting components of your server report writer product reside on your AS/400. Jacana allows you to design new report definitions on your Windows-based PC from the data source you specify.

To do this, Jacana needs the data source definition from your server to be loaded onto your PC. Once this is done you can design new report definitions or modify existing ones using Jacana. With the data source definition on your PC, you can design report definitions for that data source without connecting to your server. When your report definition is complete, you can then load it back to your server.



This offers great flexibility, but has potential for problems as someone working in the server environment can alter the data source definition. When the report definition is ready to be loaded back to the server, the data source may have changed, potentially making your report definition invalid.

To prevent invalid report definitions being resident on the server, Jacana performs version checking when the report definition is saved back to the server. Jacana warns you if there has been a modification of the data source that may cause the report definition to be invalid or unexecutable.



A single server product can support many Jacana users. It is possible for more than one user to download and modify the same report definition at the same time. Users working in the server environment may also be modifying the report definition.

Jacana detects version mismatches when report definitions are saved to the server, issuing appropriate warning or other messages advising of the version mismatch and the actions available.

A version check mismatch can occur when saving to the server:

- ◆ a new report definition based on a different version of the data source to that now available on the server
- ◆ a modified report definition, where the current server version of that definition is later than the version you down-loaded for modification
- ◆ any report based on a data source that has since been deleted.

## Other considerations

- ◆ It is possible for an authorized user operating in the server environment to change the authorities, i.e. access rights, to the server version of the report definition while it is downloaded into Jacana. For example, they could remove rights to alter the report. While this is not strictly a 'version mismatch', it will prevent the over-writing of the server version of the report definition, i.e. the version in Jacana cannot be loaded to the server. In this case, save the modified version of the report definition as a new report definition (Save As) or abandon the changes.
- ◆ Jacana will only load a report definition back to the data library from which the data source was originally downloaded.

## ▼ Hands-on exercises

These exercises introduce you to the major concepts and functions of Jacana. In these exercises you will become acquainted with the Jacana window and the various tools by creating a number of report definitions.

✘ **These exercises build upon each other. It is important that you do them in the sequence shown.**

Most of the exercises use the report definition you created in the previous exercise. So save your report definitions when you are asked to. Use a name you will remember. For example, you could use the name convention: JACxxxnn.REP, where xxx are your initials and nn is the number of the exercise you are doing, e.g. JACJJP02.REP.

✘ **Do not use data library EXERCISES unless you have no connection to an AS/400. You will not be able to run reports created over data sources from EXERCISES.**

### ▲ Exercise One

**Objective:** Produce a simple detailed report from an inventory database showing available and committed stock for parts held at each warehouse. On completion of this exercise, the report should look similar to this:

|            |  |                           |
|------------|--|---------------------------|
| JACiii01XX | XXXXXXXXXXXXJacana ExercisesXXXXXXXXXXXX | Page 99999                |
|            |  | HH:MM:SS DD/MM/YY         |
| Warehouse  | Product                                  | Product                   |
| Identity   | Description                              | Number Quantity Quantity  |
| -----      | -----                                    | Identity On hand On order |
| XXXXX      | XXXXXXXXXXXXXXXXXXXXXXXXXXXX             | XXXXXX 9999999- 9999999-  |
| XXXXX      | XXXXXXXXXXXXXXXXXXXXXXXXXXXX             | XXXXXX 9999999- 9999999-  |
| XXXXX      | XXXXXXXXXXXXXXXXXXXXXXXXXXXX             | XXXXXX 9999999- 9999999-  |
| XXXXX      | XXXXXXXXXXXXXXXXXXXXXXXXXXXX             | XXXXXX 9999999- 9999999-  |
| XXXXX      | XXXXXXXXXXXXXXXXXXXXXXXXXXXX             | XXXXXX 9999999- 9999999-  |
| XXXXX      | XXXXXXXXXXXXXXXXXXXXXXXXXXXX             | XXXXXX 9999999- 9999999-  |
| JACiii01XX | XXXXXXXXXXXXJacana ExercisesXXXXXXXXXXXX | Page 99999                |

Note: Guide only. Some characters not positioned exactly.

### New concepts:

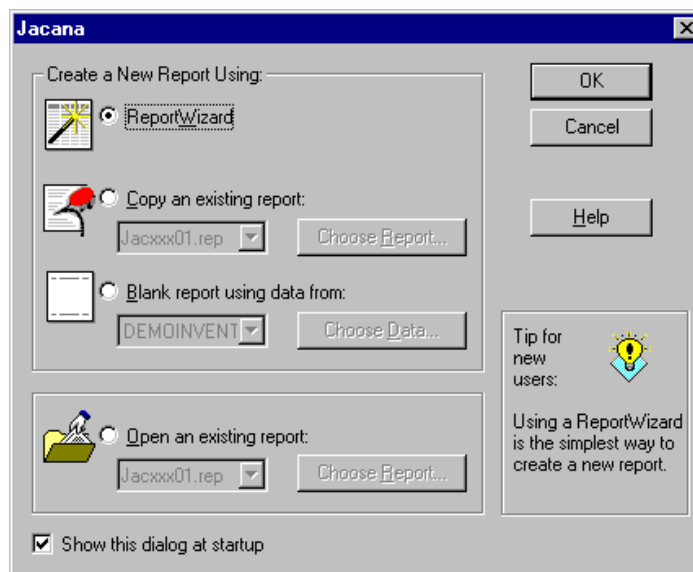
- The ReportWizard

- Data sources and fields
- Sorting data
- Basic layout features
- Saving reports

## The report wizard

Here you will start Jacana and start the ReportWizard to design a new report.

- √ Start Jacana. Jacana displays the Tip of the Day dialog box.
- ➔ If you have already been using Jacana, this dialog will not be available. Instead, click on the New button to start a new report and bypass the next paragraph.
- √ Click the **Close** button. Jacana displays the Jacana start up dialog box.



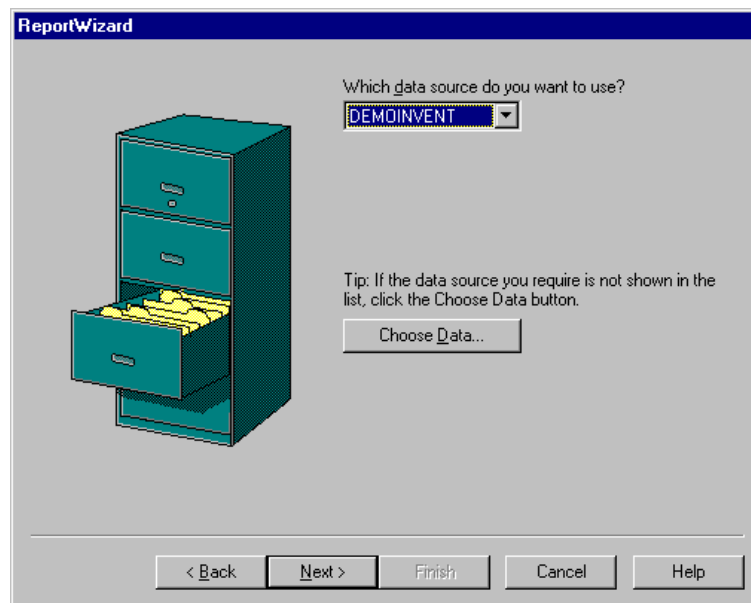
- √ Choose the *ReportWizard* option. Click **OK**. Jacana displays either:
  - ◆ the first ReportWizard dialog box, or
  - ◆ the Choose Wizard dialog box.
- ➔ The Choose Wizard dialog is shown only if more than one Wizard is available, and the **Always use default ReportWizard** option is NOT set.

- √ If the Choose Wizard Dialog is shown, choose the standard ReportWizard and click on the **OK** button.
- √ Click on the **Next** button. Jacana displays the data source dialog box.

## Choosing a data source

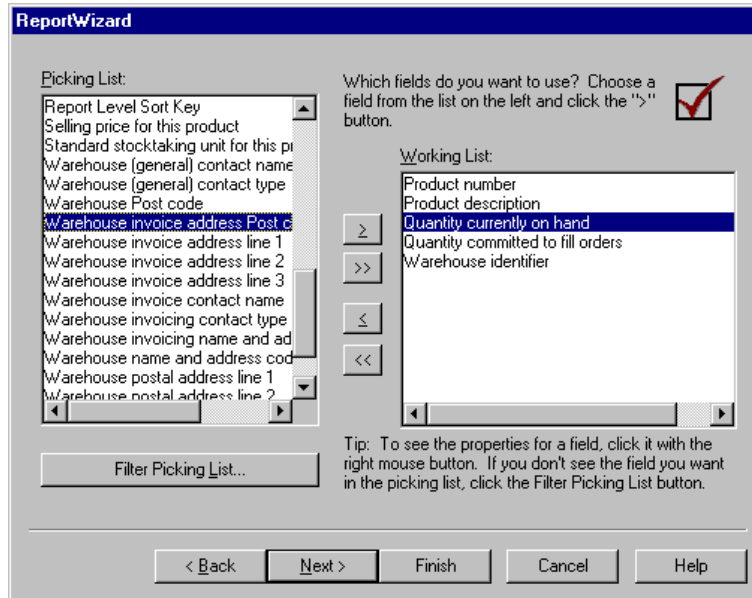
Here you will specify where the information will be obtained to create the report. The term 'data source' refers to the server (AS/400) database file or subset you are using. The data source is defined on the server, but a copy may be saved locally (on your PC).

- √ Select the DEMOINVENT data source from the drop down list.



- ➔ If this data source is not shown on the drop down list, click on the **Choose Data** button. Jacana displays the Choose Data dialog box. Choose the **Subset** tab. Choose the DEMOINVENT subset. Click **OK**.
- √ Click on the **Next** button. Jacana displays the fields dialog box.
- √ Click on the *Warehouse identifier* field and then click on the > button. This field is now the first field to include in the report.
- ➔ Fields are listed in alphabetical order.

- √ Now add the other fields:
  - » Product description
  - » Product number
  - » Quantity currently on hand
  - » Quantity committed to fill orders

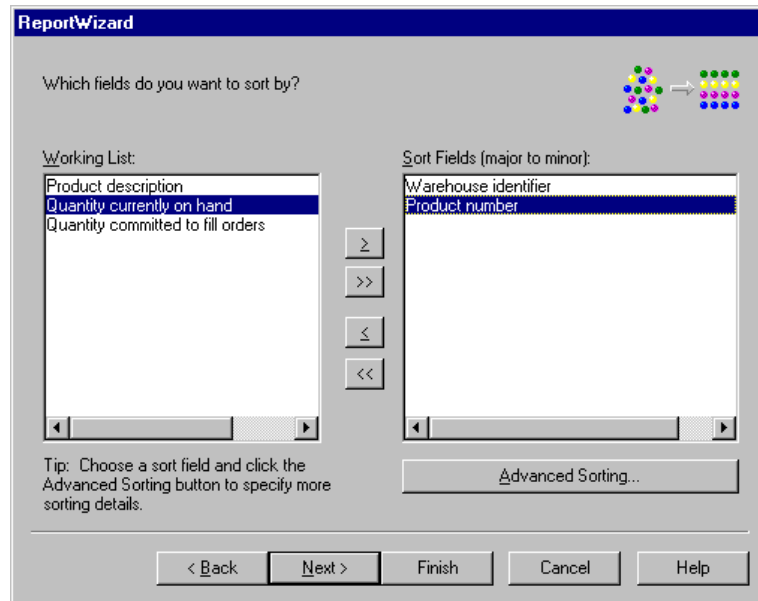


- √ Click on the **Next** button. Jacana displays the next dialog box. You have now finished choosing the fields to include in your report.

## Sorting

Here you control the order in which lines of data appear down the page in your report (You will design the report layout i.e. the order of field placement across the page, in a later step)

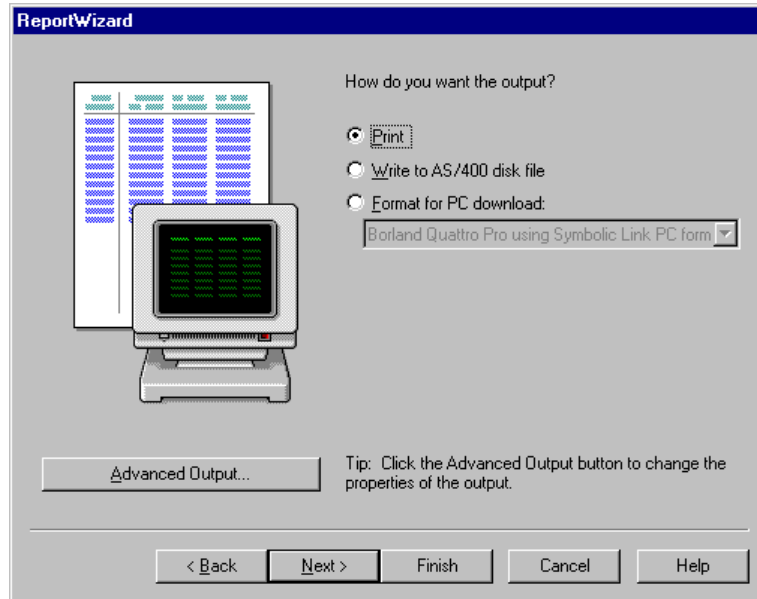
- √ Click on the **Next** button. Jacana displays the sorting dialog box, where you can choose the sequence of records for your report. In this example you will create a list of products sorted by warehouse and product number.
- √ Click on the *Warehouse identifier* field and then click on the > button. This field is now the major sort field.



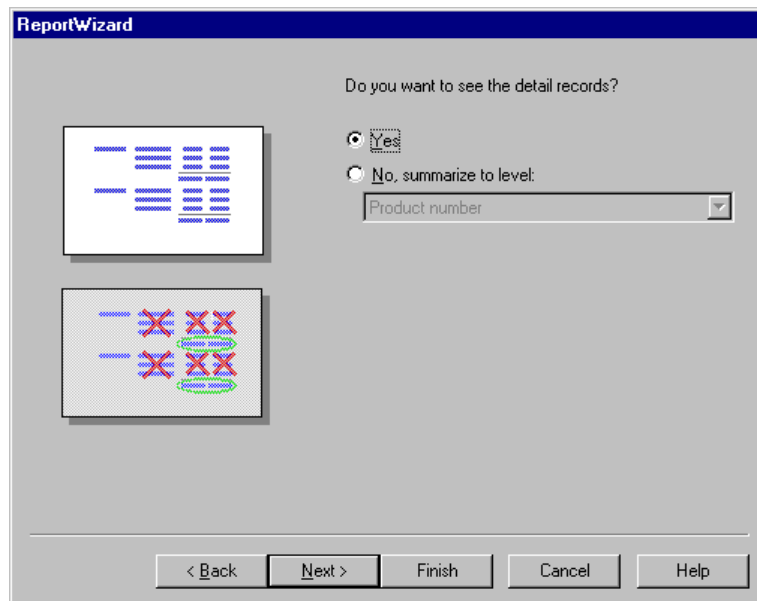
- √ Make the *Product number* the next sort field.
- √ Click on the **Next** button. Jacana displays the select/omit dialog box. You will use select/omit in the next exercise.
- √ Click on the **Next** button. Jacana displays the totals dialog box. You will use totals in the next exercise.
- √ Click on the **Next** button. Jacana displays the dialog box for choosing to use matrix columns.
- √ Choose the option for No matrix columns. You will use matrix columns in a later exercise.
- √ Click on the **Next** button. Jacana displays the next dialog box.

## Basic layout features

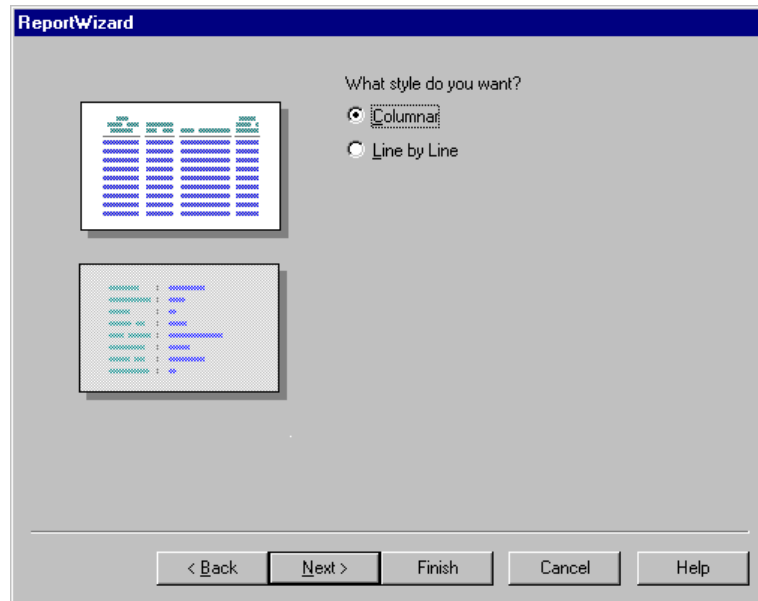
- √ Click on the **Next** button. Jacana displays the output dialog box.



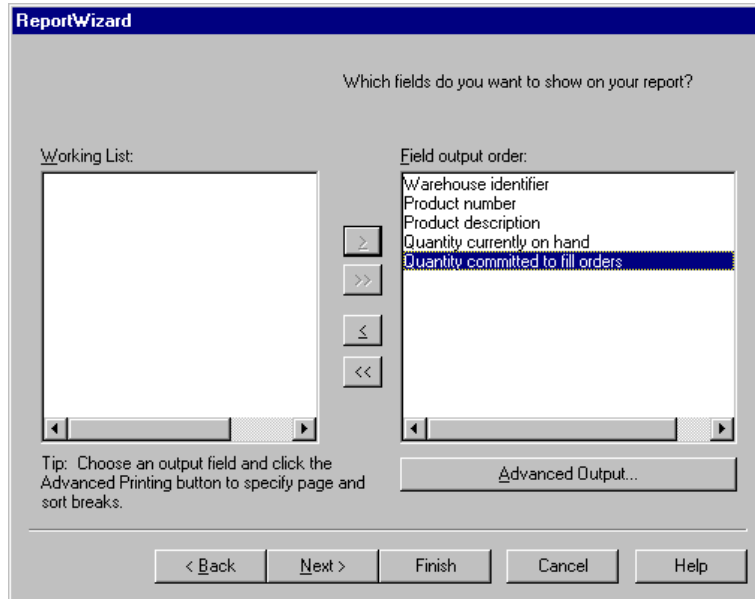
- ✓ Choose the *Print* option. This means when the user runs the report the output will be designed for printing. Click on the **Next** button. Jacana displays the details dialog box.



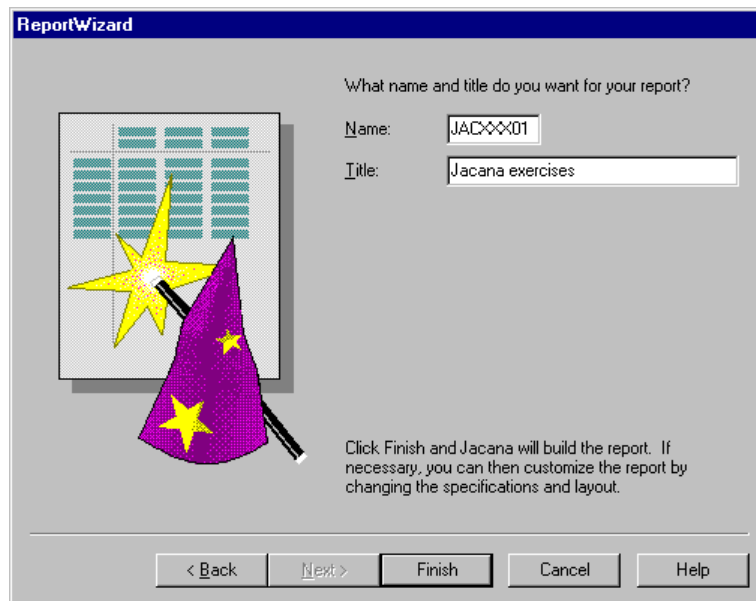
- ✓ Choose the *Yes, show details* option, this is not a summary report. Click on the **Next** button. Jacana displays the style dialog box.



- √ Choose the *Columnar* option, which is the most common type of report. Click on the **Next** button. Jacana displays the field order dialog box. This is where you specify which fields are printed in the report.
- √ Choose the order you want the fields shown in. Click on each field and then on the > button. Choose the fields in this order:
  - » Warehouse identifier
  - » Product description
  - » Product number
  - » Quantity currently on-hand
  - » Quantity committed to fill orders.



- ✓ Click on the **Next** button. Jacana displays the title dialog box.
- ✓ Enter a title and name for your report. Enter the name JACxxx01, where xxx are your initials and the title *Jacana exercises*.

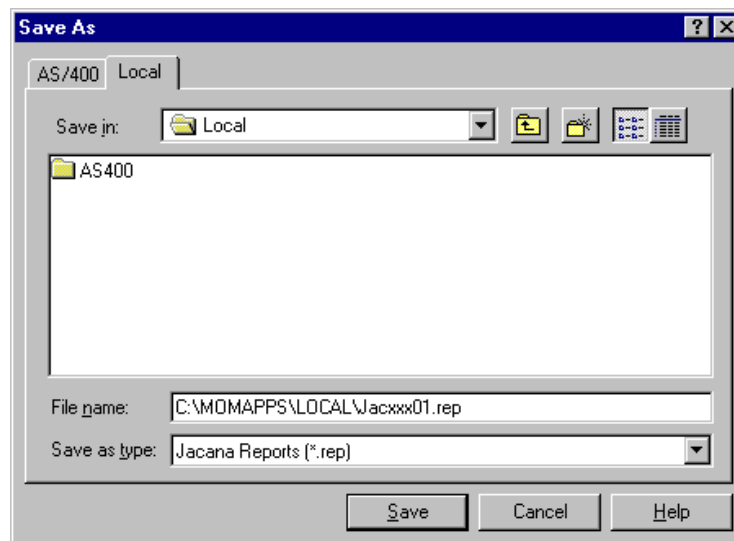


- ✓ Click on the **Finish** button. The ReportWizard will now create your report definition based on the answers you gave. Jacana displays your report definition.

## Saving reports

Here you will save the report definition. The report must be saved to an AS/400 before it can be run. However, in these exercises you will not run the reports. You must save report definitions locally if you want to continue with later exercises.

- ✓ Click on the **Save** button or choose **Save** from the **File** menu. Save your report definition as JACxxx01.REP, where xxx are your initials.



- ➔ Save your exercise files locally (on your PC). Choose the **Local** tab from the Save dialog box.
- ✓ Click **OK** to save your report definition.
- ✓ Choose the **Close** option from the **File** menu.

This completes exercise one. You have now created a report definition using the ReportWizard function. You have chosen the data source, the fields, how the data is sorted and how the report is to appear.

▲ *Exercise Two*

**Objective:** Produce a simple detailed report from an inventory database showing value of available stock for parts held at each warehouse. The report should also show totals by warehouse. On completion of this exercise, the report should look similar to this:

|                                      |  |                    |
|--------------------------------------|--|--------------------|
| JACiii02XX                           | XXXXXXXXXXXXJacana ExercisesXXXXXXXXXXXX | Page 9999          |
|                                      |  | HH:MM:SS DD/MM/YY  |
| Warehouse ID . . . :                 | XXXXX                                    |                    |
| Warehouse Desc. . :                  | XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX     |                    |
| Product Description                  | Product Number Identity                  | Quantity On hand   |
| -----                                | -----                                    | -----              |
| XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | XXXXXX                                   | 9999999- 99999.99- |
| XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | XXXXXX                                   | 9999999- 99999.99- |
| XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | XXXXXX                                   | 9999999- 99999.99- |
| XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | XXXXXX                                   | 9999999- 99999.99- |
| XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | XXXXXX                                   | 9999999- 99999.99- |
| XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | XXXXXX                                   | 9999999- 99999.99- |
|                                      |  | 999999999-         |
|                                      |  | 999999999-         |
| JACiii02XX                           | XXXXXXXXXXXXJacana ExercisesXXXXXXXXXXXX | Page 9999          |

Note: Guide only. Some characters not positioned exactly.

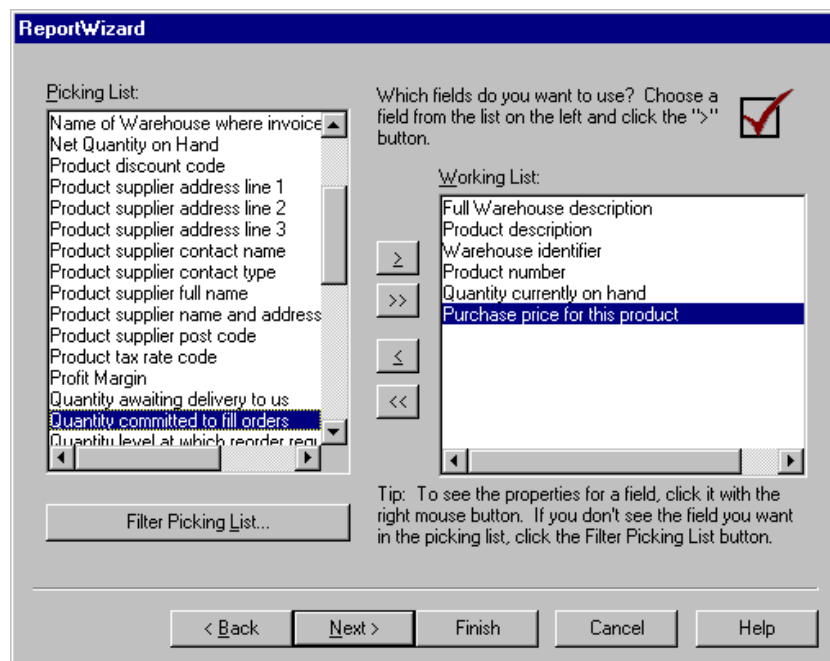
**New concepts:**

- Selecting the data you want
- summarizing data (totals)
- Printing data in the headings.

Getting started

- √ Click on the New button or choose the **New** option from the File menu. Jacana displays the New Report dialog box.
- √ Choose the *ReportWizard* option. Click **OK**.
- √ If Jacana shows the Choose Wizard dialog box, choose the standard ReportWizard and click **OK**
- √ Jacana displays the first ReportWizard dialog box.
- √ Click on the **Next** button. Jacana displays the data selection dialog box.

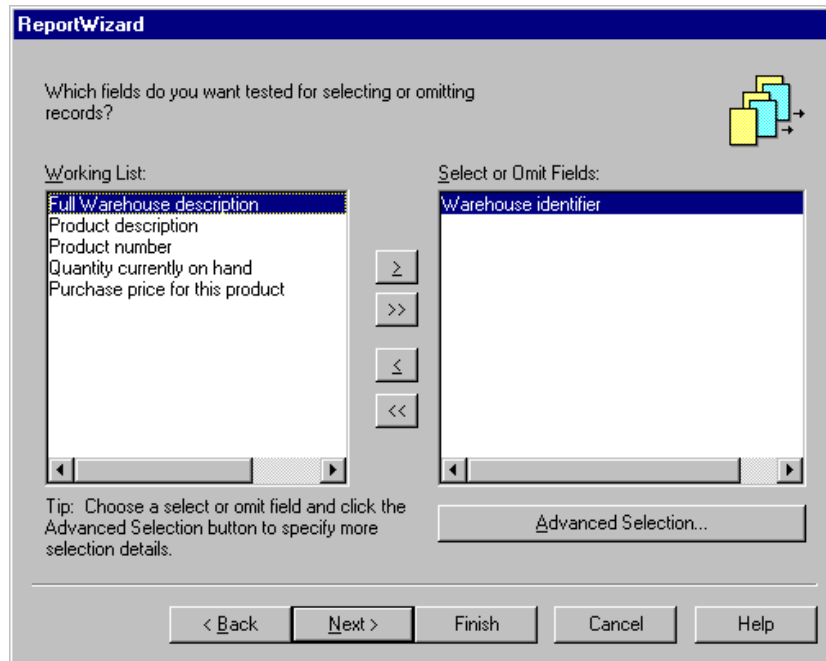
- √ Select the DEMOINVENT data source from the drop down list. Click on the **Next** button. Jacana displays the fields dialog box.
- √ Choose the fields to include in the report definition. Include these fields:
  - » Warehouse identifier
  - » Full warehouse description
  - » Product description
  - » Product number
  - » Quantity currently on hand
  - » Purchase price for this product.
- ➔ You can double-click on a field to include it in the report definition.



- √ Click on the **Next** button. Jacana displays the next dialog box. You have now finished choosing the fields to include in your report.
- √ Click on the **Next** button. Jacana displays the sorting dialog box.
- √ Sort the report by *Full warehouse description* and the *Product description* fields.
- √ Click on the **Next** button. Jacana displays the select/omit dialog box.

## Selecting the data you want

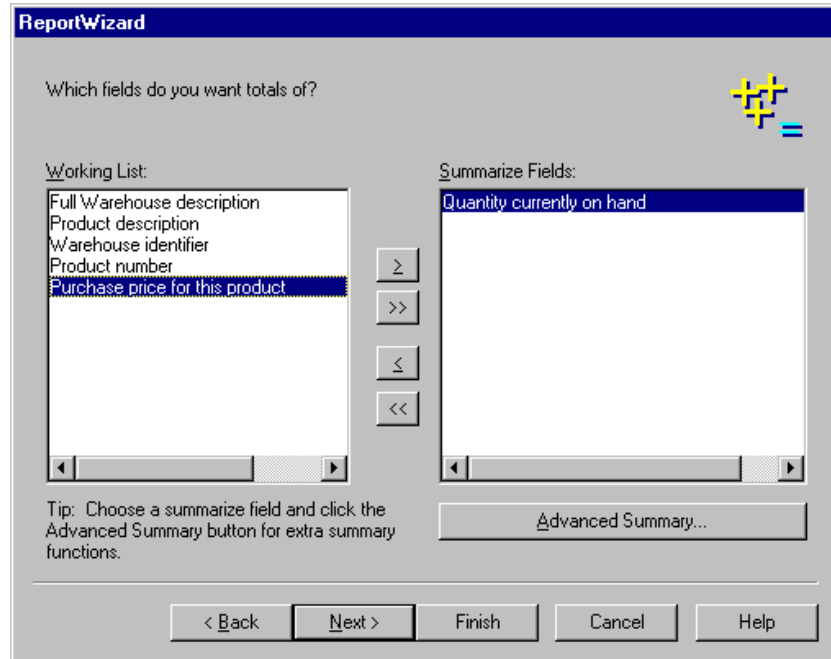
- √ Double-click on the *Warehouse identifier* field. You have now specified that when a user asks for this report to run, they will be prompted to choose which warehouse(s) to include in their report.



- √ Click on the **Next** button. Jacana displays the totals dialog box.

## Totals

- √ Double-click on the *Quantity currently on hand* field. You have now specified that the report will include totals for the quantity on hand.

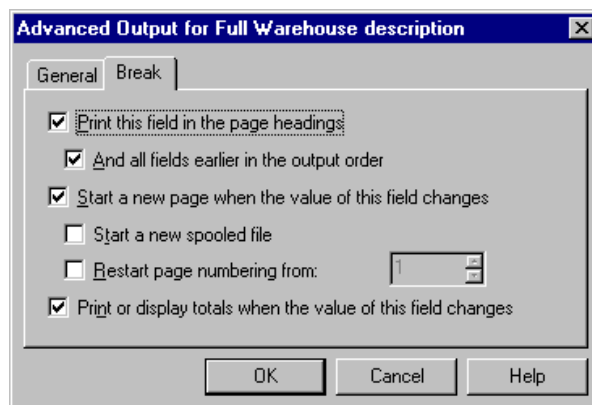


- √ Click on the **Next** button.
- √ Choose the option for No matrix columns. You will use matrix columns in a later exercise. Jacana displays the next dialog box.
- √ Click on the **Next** button. Jacana displays the next dialog box.
- √ Click on the **Next** button. Jacana displays the output dialog box.
- √ Choose the *Print* option. Click on the **Next** button. Jacana displays the details dialog box.
- √ Choose the *Yes, show details* option. Click on the **Next** button. Jacana displays the style dialog box.
- √ Choose the *Columnar* option. Click on the **Next** button. Jacana displays the field order dialog box.
- √ Choose the order you want the fields shown in. Click on each field and then on the > button. Choose the fields in this order:
  - » Warehouse identifier
  - » Full warehouse description
  - » Product description
  - » Product number
  - » Quantity currently on hand
  - » Purchase price for this product.

## Printing fields in the headings

Here you decide the report will be clearer if the warehouse and its description are printed in the headings, rather than on each line of the report.

- √ Click on the *Full warehouse description* field.
- √ Click on the **Advanced Output** button. Jacana displays the advanced output dialog box.
- √ Click on the **Break** tab. Jacana displays the break options.
- √ Choose the *Print this field in the page headings* option. Now this field will print in each page's headings when the report is run.
- √ Choose the *And all fields earlier in the output order* option. Now all the preceding fields will also appear in the page headings. This means the warehouse identifier and description will be shown at the top of each page making it easier to read the report.
- √ Choose the *Start a new page when the value of this field changes* option. Usually when printing fields in the headings you set this option for at least one field in the headings, often a sort field. This means the output will start a new page when this particular field changes value.



- √ Click **OK**. Jacana returns to the field order dialog box.

## Remove redundant totals

Here you suppress printing of totals on change of product description. This is because product description is likely to change on each line of the report and summarized totals will be redundant.

- √ Click on the *Product description* field.
- √ Click on the **Advanced Output** button. Jacana displays the advanced printing dialog box.
- √ Click on the **Break** tab. Jacana displays the break options.
- √ Click on the *Print or display totals when the value of this field changes* option. Now you have turned off this option (removed the check) and the report will not include totals for this field every time it changes.
- √ Click **OK**. Jacana returns to the field order dialog box.
- √ Click on the **Next** button. Jacana displays the title dialog box.
- √ Enter a title for your report. Enter the name JACxxx02, where xxx are your initials and the title *Jacana exercises*.
- √ Click on the **Finish** button. The ReportWizard will now create your report definition, based on the answers you gave.
- √ Click on the Save button or choose **Save** from the **File** menu. Save your report definition as JACxxx02.REP, where xxx are your initials.
- Save your exercise files locally (on your PC). Choose the **Local** tab from the Save dialog box.
- √ Choose the **Close** option from the **File** menu.

This completes exercise two. You have now created another report definition using the ReportWizard function. You have used some of the advanced features of the ReportWizard to customize your report.

▲ *Exercise Three*

**Objective:** Enhance the appearance of the report from exercise two. On completion of this exercise, the report should look similar to this:

|                          |                             |                              |   |
|--------------------------|-----------------------------|------------------------------|---|
| JACiii03XX               | XXXXXXXXXXXX                | Jacana ExercisesXXXXXXXXXXXX | Page 9999                                     |
| User . . . . .           | : XXXXXXXXX                 |                              | HH:MM:SS DD/MM/YY                             |
| Warehouse ID . . . .     | : XXXXX                     |                              |   |
| Warehouse Desc. . .      | : XXXXXXXXXXXXXXXXXXXXXXXXX |                              |   |
| Product Description      | Product Number Identity     | Quantity On hand             | Product Purchase Price Date of Last Stocktake |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                      | 9999999-                     | 99999.99- 99/99/99                            |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                      | 9999999-                     | 99999.99- 99/99/99                            |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                      | 9999999-                     | 99999.99- 99/99/99                            |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                      | 9999999-                     | 99999.99- 99/99/99                            |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                      | 9999999-                     | 99999.99- 99/99/99                            |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                      | 9999999-                     | 99999.99- 99/99/99                            |
| Total for this warehouse |                             | 999999999-                   |   |
| Report total             |                             | 999999999-                   |   |
| JACiii03XX               | XXXXXXXXXXXX                | Jacana ExercisesXXXXXXXXXXXX | Page 9999                                     |

Note: Guide only. Some characters not positioned exactly.

**New concepts:**

- Copying reports
- Changing the report's appearance using Layout
- Using the DataCrafter
- The control group of fields
- Changing the format for fields

Copying reports

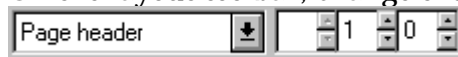
- √ Click on the New button or choose the **New** option from the File menu. Jacana displays the New Report dialog box.
- √ Choose the *Copy an existing report* option.
- √ Choose the report definition you created in the last exercise, JACxxx02.REP, from the drop-down list.

- ➔ Use this option to create a new report definition based upon the one you created in the previous exercise. It means you will still have the report definition you created in the previous exercise and a copy to change for this exercise.
- ✓ Click **OK**. Jacana displays the report definition.


## Changing the report's appearance using Layout

Here you will change the appearance of the report to learn some of the features offered by Jacana including bold type, inserting text and changing line spacing.

- ✓ Click on the heading line containing the Warehouse desc.
- ✓ On the layout toolbar, change the space before from 2 to 1.



This adjusts the spacing before this line and in this example means the warehouse ID and warehouse description will be printed closer together.


- ✓ Click on the *Warehouse ID* field in the Layout window.
- ✓ Click on the bold button on the layout toolbar.  This means the Warehouse ID field will be printed in bold letters.
- ✓ Click on the *Warehouse description* field in the Layout window.
- ✓ Click on the bold button on the layout toolbar. This means this field will also be printed bold.
- ✓ Click on the left (position 1) of the *Change of warehouse* line in the layout window (this is the line showing the first total).
- ➔ The line type is shown in the Layout toolbar.
- ✓ Check to see that you are in over-type mode (the OVR indicator on the status bar should not be grayed). If you are in insert mode, press the **Insert** key to change to overtype mode. Notice how the cursor changes when the over-type mode changes. If you are in insert mode, and you type text or add a field, all the fields after the cursor location on that line will be moved to the right.
- ✓ Type the text *Total for this warehouse*. By adding text to your report definition you can make the report output much easier to read and understand.

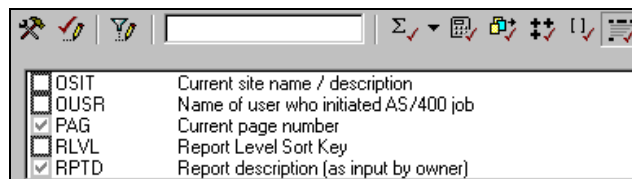
- √ Click on the left of the Report level in the layout window (this is the line showing the second or overall total).
- ➡ Use the scroll bars to move around your report layout.
- √ Type the text *Report total*.

|                                      |                                      |                  |                        |
|--------------------------------------|--------------------------------------|------------------|------------------------|
| Warehouse ID . . . . :               | XXXXXX                               |                  |                        |
| Warehouse Desc. . . :                | XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX |                  |                        |
| Product Description                  | Product Number Identity              | Quantity On hand | Product Purchase Price |
| -----                                | -----                                | -----            | -----                  |
| XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | XXXXXX                               | 9999999-         | 99999.99-              |
| XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | XXXXXX                               | 9999999-         | 99999.99-              |
| XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | XXXXXX                               | 9999999-         | 99999.99-              |
| XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | XXXXXX                               | 9999999-         | 99999.99-              |
| XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | XXXXXX                               | 9999999-         | 99999.99-              |
| XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | XXXXXX                               | 9999999-         | 99999.99-              |
| Total for this warehouse             |                                      | 999999999-       |                        |
| Report total                         |                                      | 999999999-       |                        |

## Using the DataCrafter

Here you will find fields from the data source for printing in your report where you want it. All fields currently in the report were placed by the ReportWizard.

- √ Click on the Standard Fields button in the DataCrafter.  Jacana displays fields which should common to all data sources. This includes fields such as page number, Number of Pages. Jacana updates the picking list in the DataCrafter.
- √ Scroll the DataCrafter until you find the *Name of user who initiated AS/400 job* field.



- √ Click on this field and use the right mouse button to drag-and-drop it into column one of the second line of your report layout
- √ Choose the *Field and label* option from the shortcut menu. You gave just added the user's name to the report definition. This means when the report is run the user's name is included in the report output.



## Changing the format for fields

- √ Use the right mouse button to click on the *Date of last physical stocktake* field in the Layout window. Jacana displays a shortcut menu.
- √ Choose the **Format Field** option from the shortcut menu.
- √ Click on the **Editing** tab.
- √ Choose the *Date* option. This will insert separators between the day, month and year.
- √ Click **OK**.
- √ Click on the Save button or choose **Save** from the **File** menu. Save your report definition as JACxxx03.REP, where xxx are your initials.
- √ Choose the **Close** option from the **File** menu.

This completes exercise three. You have now created a new report definition by using a copy of a previous report definition. You have filtered the picking list, used the DataCrafter and worked with the report layout.

### ▲ Exercise Four

**Objective:** Modify the report from exercise three to calculate and print *Margin on Quantity on Hand*. On completion of this exercise, the report should look similar to this:

|                          |                                    |                              |                         |
|--------------------------|------------------------------------|------------------------------|-------------------------|
| JACiii04X                | XXXXXXXXXXXX                       | Jacana ExercisesXXXXXXXXXXXX | Page 9999               |
| User . . . . .           | : XXXXXXXXX                        |                              | HH:MM:SS DD/MM/YY       |
| Warehouse ID . . . .     | : XXXXX                            |                              |                         |
| Warehouse Desc. . .      | : XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX |                              |                         |
| Product Description      | Product Number                     | Quantity On hand             | Product Purchase Price  |
|                          | Identity                           |                              | Date of Last Stocktake  |
|                          |                                    |                              | Margin Quantity on hand |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                             | 9999999-                     | 99999.99-               |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                             | 9999999-                     | 99999.99-               |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                             | 9999999-                     | 99999.99-               |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                             | 9999999-                     | 99999.99-               |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                             | 9999999-                     | 99999.99-               |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                             | 9999999-                     | 99999.99-               |
| Total for this warehouse |                                    | 99999999-                    | 999999.99-              |
| Report total             |                                    | 99999999-                    | 999999.99-              |
| JACiii04X                | XXXXXXXXXXXX                       | Jacana ExercisesXXXXXXXXXXXX | Page 9999               |

Note: Guide only. Some characters not positioned exactly.

## New concepts:

- Calculation fields
- Change field properties

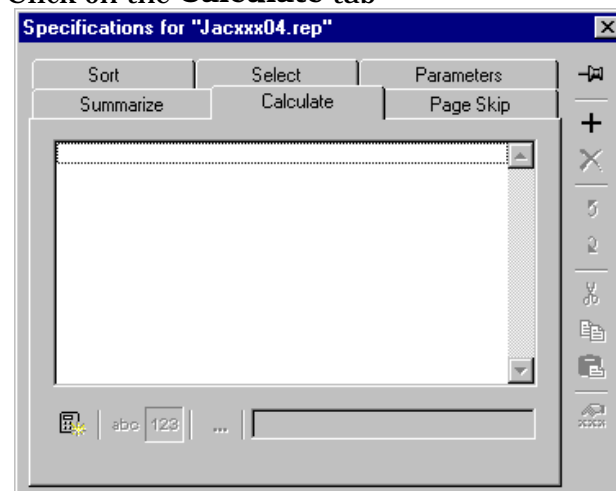
## Getting started

- √ Click on the **New** button or choose the **New** option from the File menu. Jacana displays the New Report dialog box.
- √ Choose the *Copy an existing report* option.
- √ Choose the report definition you created in the last exercise, JACxxx03.REP, from the drop-down list.
- √ Click **OK**. Jacana displays the report definition.

## Calculation fields

Here you will create a field which is calculated from other fields and include that field in your report.

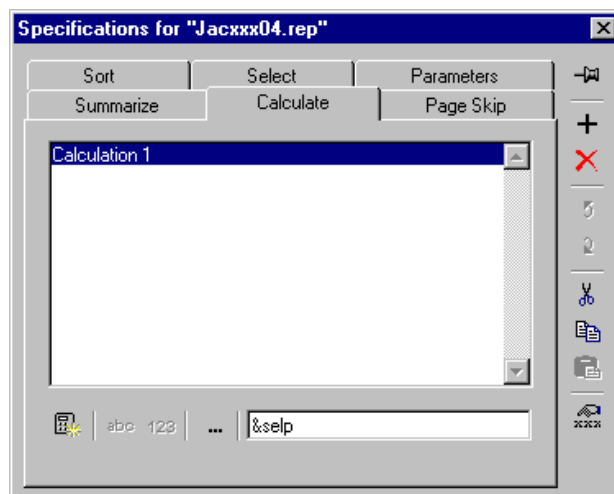
- √ Click on the **Specifications** button or choose the **Specifications** option from the **Report** menu. Jacana displays the Specifications dialog box.
- √ Click on the **Calculate** tab



### Finding the fields for the calculation

Here you are looking for the field *Selling price*.

- √ Enter the text *sel* into the **Pick Fields Containing** box in the DataCrafter.
- ➡ Drag the Specifications dialog box out of the way if the button is obscured.
- √ Press the **Enter** key. Jacana updates the picking list in the DataCrafter.
- √ Use the left mouse button to drag-and-drop *Selling price for this product* field into the Calculate list box.



### Field properties

You have now created a calculation field. Here you will set the fields properties such as field description.



- √ Click on the **Properties** button. Jacana displays the Properties dialog box. You can specify a field's settings using this dialog box.
- √ Click on the **Text** tab.

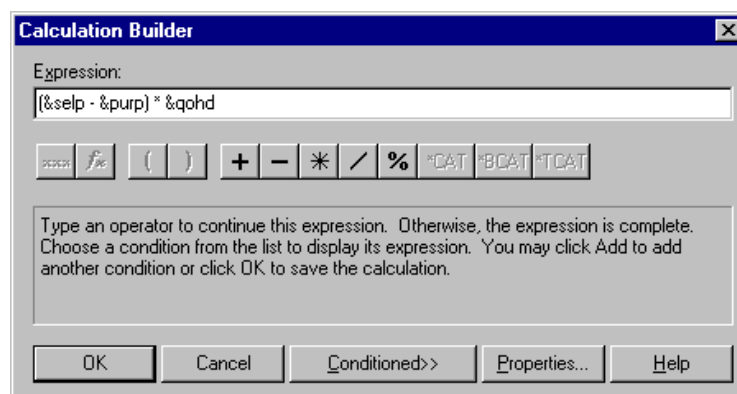
- √ Enter the following text into the appropriate box.

| In this box | Enter this text               |
|-------------|-------------------------------|
| Description | Margin on Quantity on Hand    |
| Left text   | Margin - Qty on Hand          |
| Right text  | Margin - Qty on Hand          |
| Headings    | Margin<br>Quantity<br>on Hand |


- ➔ Use the **Tab** key to move between the text boxes.
- √ Click **OK**. Jacana returns to the Specifications dialog box.

### Building the calculation expression

- √ Click on the Calculation builder button.   
Jacana displays the Calculation builder dialog box. You can use this dialog box to build complex calculations.
- √ Click on the Working List button in the DataCrafter.   
Jacana displays the working list of fields in the DataCrafter.
- √ Build this expression by dragging in fields from the DataCrafter and by using the buttons on the Calculation builder dialog box.  
 $(\&selp - \&purp) * \&qohd$   
This is: selling price minus purchase price multiplied by quantity on hand.



- √ Click **OK** to complete the calculation. You have just created a workfield that calculates margin on the quantity on hand.

- √ Click on the **Close** button to close the Specifications dialog box.
- √ Click on the Pick Calculations button on the DataCrafter.   
Jacana lists the calculated workfields in the DataCrafter.
- √ Check to see that you are in insert mode (the OVR indicator on the status bar should be grayed).
- √ Use the right mouse button to drag-and-drop *Margin on quantity on hand* field into your report layout. Place it next to *Date of last physical stocktake* in the detail line, so as to make a new column.
- √ Choose the *Field, heading and totals* option from the shortcut menu. You have just added a new column to the report. This is the field you have just calculated. The heading text comes from the properties you set. Note that Jacana re-positioned the new column to allow for the totals to be included.

| Product<br>Purchase<br>Price | Date of<br>Last<br>Stocktake | Margin<br>Quantity<br>on hand |
|------------------------------|------------------------------|-------------------------------|
| 99999.99-                    | 99/99/99                     | 99999.99-                     |
| 99999.99-                    | 99/99/99                     | 99999.99-                     |
| 99999.99-                    | 99/99/99                     | 99999.99-                     |
| 99999.99-                    | 99/99/99                     | 99999.99-                     |
| 99999.99-                    | 99/99/99                     | 99999.99-                     |
| 99999.99-                    | 99/99/99                     | 99999.99-                     |
|                              |                              | 9999999.99-                   |
|                              |                              | 9999999.99-                   |

- √ Click on the Save button or choose **Save** from the **File** menu. Save your report definition as JACxxx04.REP, where xxx are your initials.
- √ Choose the **Close** option from the **File** menu.

This completes exercise four. You have now created a new report definition by using a copy of a previous report definition. You have seen the Specifications dialog box. You used the Specifications dialog box to create calculated workfields. You also saw how to change the properties of fields.

▲ *Exercise Five*

**Objective:** Modify the report from exercise four to indicate when stock should be reordered. On completion of this exercise, the report should look similar to this:

|                          |                                |                              |                         |
|--------------------------|--------------------------------|------------------------------|-------------------------|
| JACiii05X                | XXXXXXXXXXXX                   | Jacana ExercisesXXXXXXXXXXXX | Page 99999              |
| User . . . . .           | : XXXXXXXXX                    |                              | HH:MM:SS DD/MM/YY       |
| Warehouse ID . . . .     | : XXXXX                        |                              |                         |
| Warehouse Desc. . .      | : XXXXXXXXXXXXXXXXXXXXXXXXXXXX |                              |                         |
| Product Description      | Product Number Identity        | Quantity On hand             | Product Purchase Price  |
|                          |                                |                              | Date of Last Stocktake  |
|                          |                                |                              | Margin Quantity on hand |
|                          |                                |                              | Reorder? YES/NO         |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                         | 9999999-                     | 99999.99-               |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                         | 9999999-                     | 99999.99-               |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                         | 9999999-                     | 99999.99-               |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                         | 9999999-                     | 99999.99-               |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                         | 9999999-                     | 99999.99-               |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                         | 9999999-                     | 99999.99-               |
| Total for this warehouse |                                | 99999999-                    | 9999999.99-             |
| Report total             |                                | 99999999-                    | 9999999.99-             |
| JACiii05X                | XXXXXXXXXXXX                   | Jacana ExercisesXXXXXXXXXXXX | Page 99999              |

Note: Guide only. Some characters not positioned exactly.

**New concepts:**



- creating a conditioned calculation
- cut and paste
- undo and redo

Getting started

- √ Click on the **New** button or choose the **New** option from the **File** menu. Jacana displays the **New Report** dialog box.
- √ Choose the *Copy an existing report* option.
- √ Choose the report definition you created in the last exercise, **JACxxx04.REP**, from the drop-down list.
- √ Click **OK**. Jacana displays the report definition.

## Creating the calculation field

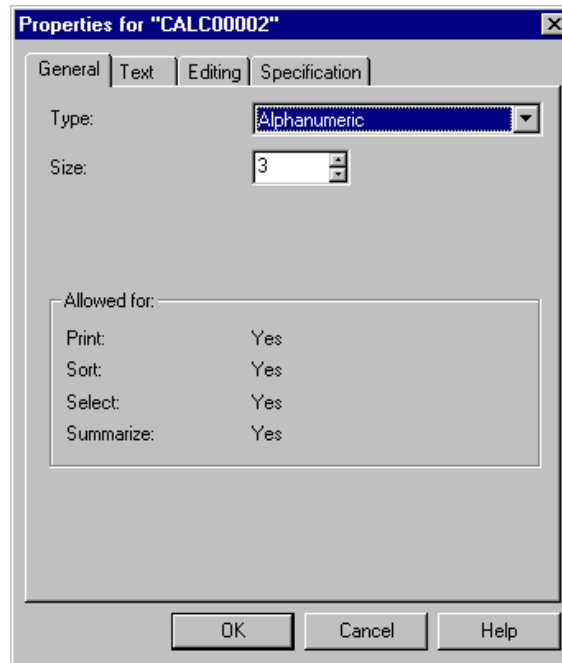
Here we will find the *reorder level* field to use as the basis for creating the condition *Product needs reordering*.


- √ Click on the Specifications button or choose the **Specifications** option from the **Report** menu. Jacana displays the Specifications dialog box.
- √ Click on the **Calculate** tab.
- √ Hold the **Shift** key and click on the New Calculation button . Holding the **Shift** key makes Jacana not use the default **Show Calculation Builder for new calculation** setting (see Jacana options). Before going to the Calculation Builder we need to change the field type.
- √ Click on the character button . Jacana changes the new work-field from numeric to character.
- √ Click on the **Properties** button. Jacana displays the Properties dialog box.
- √ Click on the **Text** tab.
- √ Enter the following text into the appropriate box.

| In this box | Enter this text    |
|-------------|--------------------|
| Description | Reorder? YES/NO    |
| Left text   | Reorder? YES/NO    |
| Right text  | Reorder? YES/NO    |
| Headings    | Reorder?<br>YES/NO |

- ➔ The Left and Right text will be automatically generated. You will need to change the column headings as punctuation characters will not be automatically inserted.
- √ Click on the **General** tab. You can use this tab to set the size and type of field.

- √ Change the *Size of the field* to 3. You have just changed this field to an alphanumeric field 3 characters long.

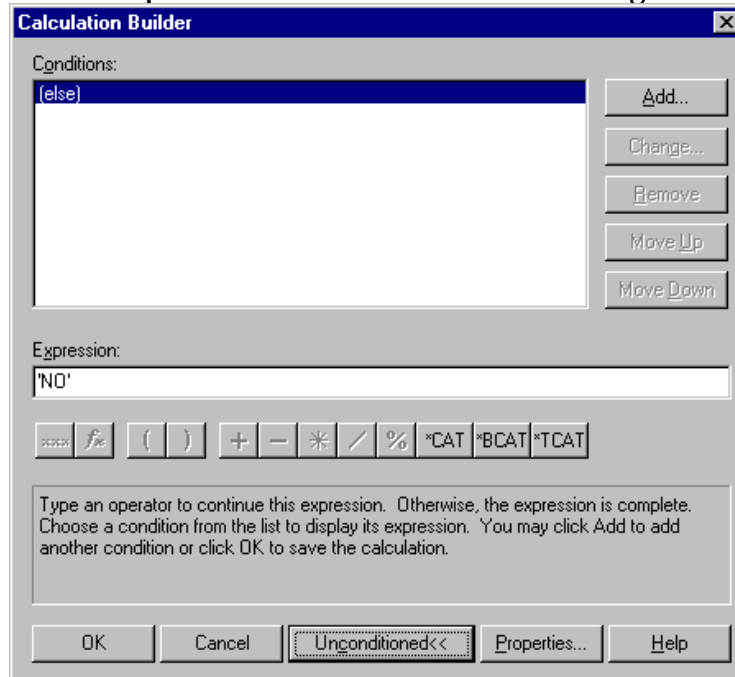


- √ Click **OK**. Jacana returns to the Specifications dialog box.
- √ Click on the Calculation builder button.  Jacana displays the Calculation builder dialog box.
- √ Enter the text 'NO' into the Expression box.  
At this stage, the Calculation field will always be set to 'NO', which is not really useful.
- ➔ Notice Jacana automatically sets the Caps Lock setting on the keyboard when typing between quotes. If this feature is not to your liking, you can turn off this feature via the **Options** dialog.

## Conditioning the calculation field

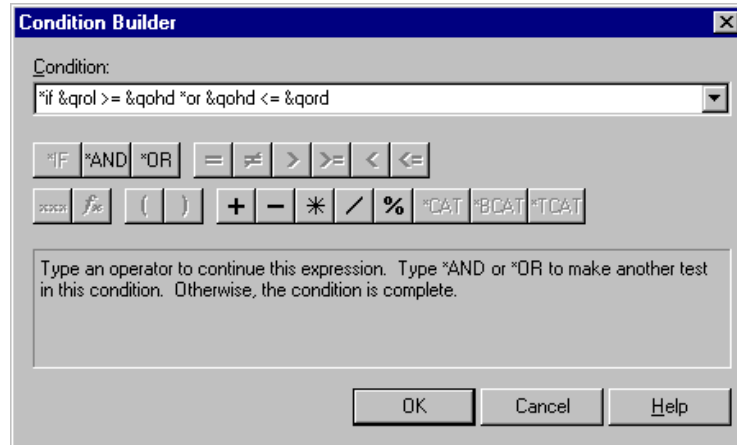
Here you will add conditions to the calculation field.

- √ Click on the **Conditioned** button.  
Jacana expands the Calculation Builder dialog.



- √ Click on the **Add** button  
Jacana shows the Condition Builder dialog.
- √ Enter the text *quantity* into the **Pick Fields Containing** box in the DataCrafter.
- √ Press the **Enter** key. Jacana updates the picking list in the DataCrafter.
- √ Build this expression by dragging in fields from the DataCrafter and by using the buttons on the Condition builder dialog box.  
$$*if \&qrol \geq \&qohd *or \&qohd \leq \&qord$$

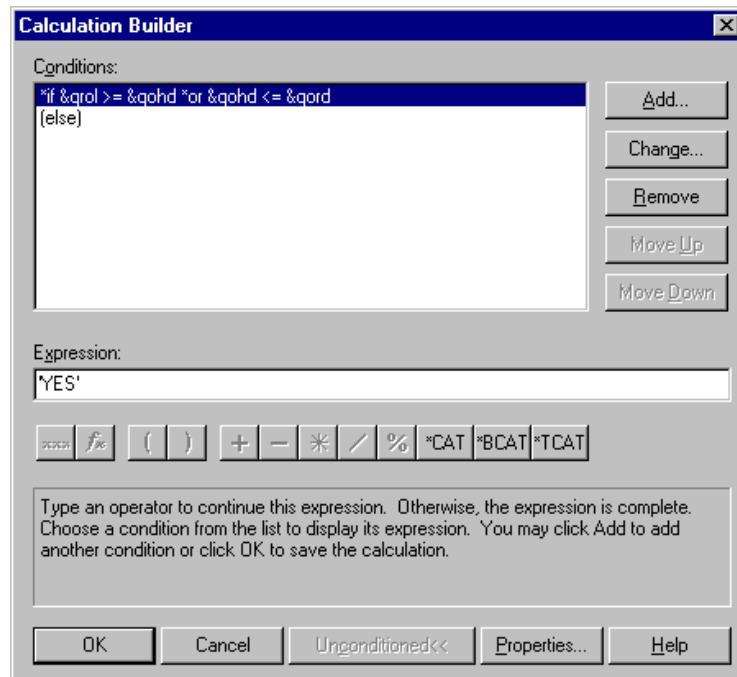
This is: The condition is true if the reorder level is greater than or equal to quantity currently on hand or the quantity currently on hand is less than or equal to quantity committed to fill orders.



- ✓ Click **OK** to complete the condition. You have just created a condition that determines if it is necessary to re-order a product.

Jacana returns to the Calculation Builder dialog box, ready for you to type an expression associated with this condition.

- ✓ Enter the text 'YES' into the Expression box.



- ➡ When a condition is chosen in the conditions list, the expression edit box shows the related expression

- When running a report the conditions are evaluated from the top of the list.  
The first condition which is true is used to set the value of the calculation field.  
If no conditions are true, the expression associated with *else* is used.
- √ Click **OK**. Jacana displays the Specifications dialog box.
- √ Click on the **Close** button.

## Using the calculation field



- √ Click on the Pick Calculations button in the DataCrafter.  
Jacana displays the calculated workfields in the DataCrafter.
  - √ Use the right mouse button to drag-and-drop *Reorder? YES/NO* field into your report layout. Place it between *Date of Last Stocktake* and *Margin quantity on hand* on the detail line, so as to make a new column.
- Make sure mode is insert, not overtype.
- √ Choose the *Field and heading* option from the shortcut menu.  
You have just added a new column to the report. This is the conditional calculation you specified. When the report is run it will calculate if the condition is true or false for each product listed. If it is true it will print YES (to reorder) and if it is false it will print NO.

## Using cut and paste

Let us assume you are not happy with where you placed the *Reorder* field. You will now move it to the right of *Margin quantity on Hand*.


- √ With your mouse, lasso the gray area shown below.

| Date of Last Stocktake | Reorder?<br>YES/NO | Margin Quantity on hand |
|------------------------|--------------------|-------------------------|
| 99/99/99               | xxx                | -----                   |
| 99/99/99               | xxx                | 99999.99-               |
| 99/99/99               | xxx                | 99999.99-               |
| 99/99/99               | xxx                | 99999.99-               |
| 99/99/99               | xxx                | 99999.99-               |
| 99/99/99               | xxx                | 99999.99-               |


- √ Click on the cut button. 
- ➔ Make sure layout is in insert mode. When in insert mode, data to the right of the insertion point is moved to accommodate the insertion or deletion. In overtype mode no adjustment occurs.
- √ Click on the paste button.  Jacana shows a tracker that indicates the affect of the pending paste.
- √ Move the mouse cursor to the right of *Margin* in the first column heading line and click to complete the paste action.

## Using undo/redo

Let us assume you are in two minds about the report layout.

- √ Click on the down arrow button for multiple undos. 
- √ Choose to undo the last two actions.

No. It was better the way it was.

- √ Click on the down arrow button for multiple redos. 
- √ Choose to redo the last two undone actions.
- √ Click on the Save button or choose **Save** from the **File** menu. Save your report definition as JAC`xxx`05.REP, where `xxx` are your initials.
- √ Choose the **Close** option from the **File** menu.

This completes exercise five. You have now seen more of the Specifications dialog box. You used the Specifications dialog box to create conditioned calculated workfields. You also saw how to further change the properties of fields.

▲ *Exercise Six*

**Objective:** Modify the report from exercise five to select

- ◆ on certain default warehouses
- ◆ products in a specified range
- ◆ only products which are committed to fill orders

The report should be also print the selection criteria for product number. On completion of this exercise, the report should look similar to this:

|                          |                                   |                              |                         |
|--------------------------|-----------------------------------|------------------------------|-------------------------|
| JACiii06X                | XXXXXXXXXXXX                      | Jacana ExercisesXXXXXXXXXXXX | Page 9999               |
| User . . . . .           | : XXXXXXXXX                       |                              | HH:MM:SS DD/MM/YY       |
| From product #           | XXXXXX                            | To product #                 | XXXXXX                  |
| Warehouse ID . . . .     | : XXXXX                           |                              |                         |
| Warehouse Desc. . .      | : XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX |                              |                         |
| Product Description      | Product Number Identity           | Quantity On hand             | Product Purchase Price  |
|                          |                                   |                              | Date of Last Stocktake  |
|                          |                                   |                              | Margin Quantity on hand |
|                          |                                   |                              | Reorder? YES/NO         |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                            | 9999999-                     | 99999.99-               |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                            | 9999999-                     | 99999.99-               |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                            | 9999999-                     | 99999.99-               |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                            | 9999999-                     | 99999.99-               |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                            | 9999999-                     | 99999.99-               |
| XXXXXXXXXXXXXXXXXXXX     | XXXXXX                            | 9999999-                     | 99999.99-               |
| Total for this warehouse |                                   | 99999999-                    | 9999999.99-             |
| Report total             |                                   | 99999999-                    | 9999999.99-             |
| JACiii06X                | XXXXXXXXXXXX                      | Jacana ExercisesXXXXXXXXXXXX | Page 9999               |

Note: Guide only. Some characters not positioned exactly.

**New concepts:**

- more on selecting data
- the run-time interface
- inserting lines in layout


Getting started

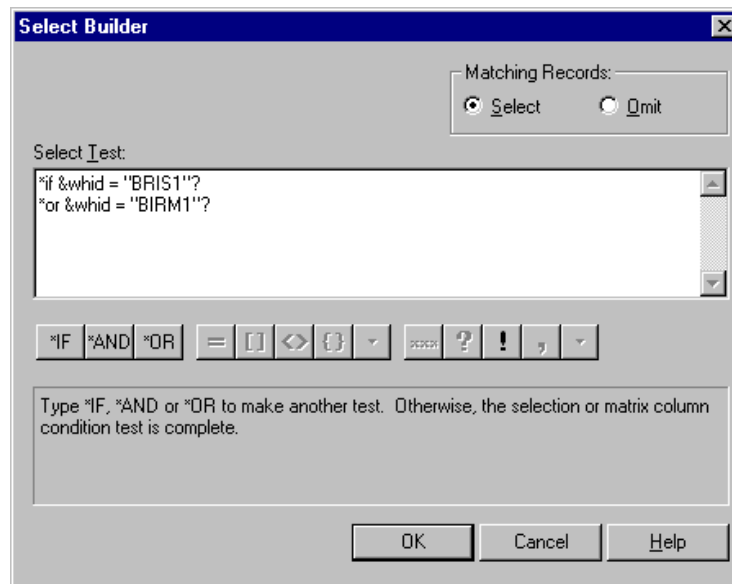
- √ Click on the New button or choose the **New** option from the File menu. Jacana displays the New Report dialog box.
- √ Choose the *Copy an existing report* option.
- √ Choose the report definition you created in the last exercise, JACxxx05.REP, from the drop-down list.

- √ Click **OK**. Jacana displays the report definition.
- √ Click on the **Specifications** button or choose the **Specifications** option from the **Report** menu. Jacana displays the **Specifications** dialog box.

## More on selecting data

Here you will make the report select products only for specified warehouses.

- √ Click on the **Select** tab.
- √ Click on the Select builder button.   
Jacana displays the Select builder dialog box.  
You can use this dialog box to specify what fields the user will use to select or omit records for their report.
- √ Build this expression by dragging in fields from the DataCrafter and by using the buttons on the Select builder dialog box.
  - \*if &whid = 'BRIS1'?
  - \*or &whid = 'BIRM1'?
- ➔ If the last character in a select/omit field is '?', when a user runs the report, they will be prompted to accept, change or remove the select/omit value.



- ➔ Notice the Matching records indicator is set to the default, Select. To omit records, you would click on the Omit option.

- √ Click **OK** to complete the select/omit criteria. Jacana displays the Specifications dialog box.

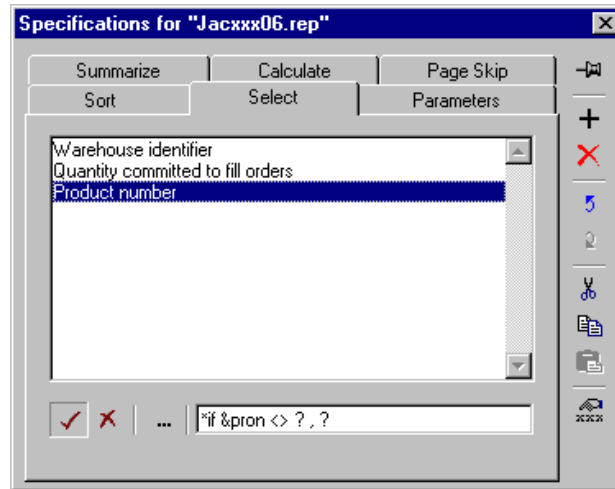
Here you will make the report select products only if some of the stock is committed to fill customer orders.

- √ Click on the Working List button in the DataCrafter. Jacana displays the working list of fields in the DataCrafter.
- √ Use the left mouse button to drag-and-drop the *Quantity committed to fill orders* field into the Select list box
- √ Edit the expression shown below the list to read  
\*if &qord > 0  
This selection test will automatically select product records that have a quantity committed to fill orders greater than zero. The user will not be prompted as there is no ? in the expression.

Here you will make the report select products in a given range.



- √ Use the left mouse button to drag-and-drop the *Product number* field into the Select box.
- √ Click on the Select builder button. Jacana displays the Select builder dialog box.
- √ Use the **Backspace** key to remove the '= ?'.
- √ Click on the range button, <> and then the ? , ? buttons to build the expression.  
The ? , ? means that when a user runs the report, they will be prompted for the two values setting the range of product numbers to include in their report. If the user does not specify a range, all products will be selected.

- ✓ Click **OK** to complete the select/omit criteria. Jacana displays the Specifications dialog box.



- ✓ Click on the **Close** button.


## Print the selection criteria for product range

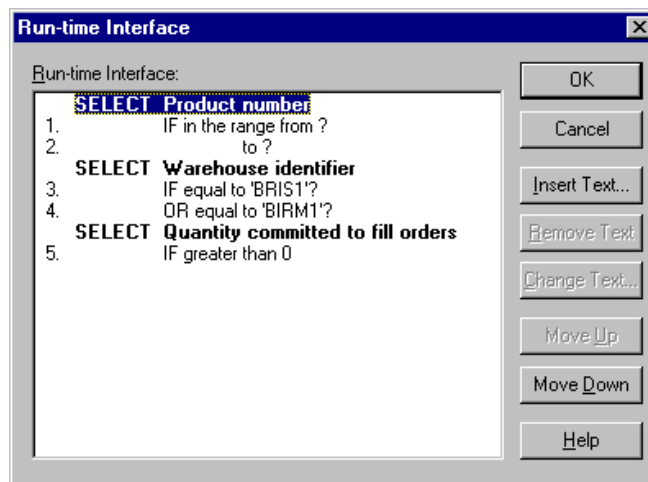
- ✓ Click on the second line of the report (the one showing the user name).
- ✓ Click on the insert line after button on the layout toolbar . This will insert another header line into the report layout, below the current line.
- ✓ Click on the Pick Selection Values button in the DataCrafter.  Jacana displays the selection fields in the DataCrafter.
- ✓ Use the left mouse button to drag-and-drop the *Selection value 1 for product number* field into your report layout. Place it on the newly inserted line. Repeat for *Selection value 2 for product number* field.
- ✓ Add text to the product number ranges.

From product # XXXXXX To product # XXXXXX

## The run-time interface

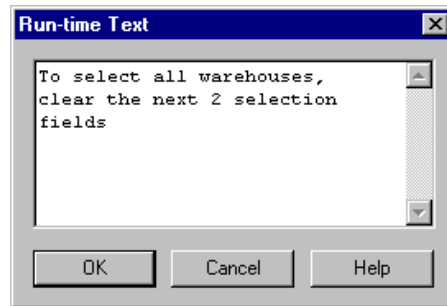
The run-time interface shows the text or prompts that will be shown to the user when the report is run. You can add text to these prompts so the user has a better understanding of what they have to enter. You can also change the order in which various values are requested.

- ✓ Click on the Run-time Interface button.   
Jacana displays the Run-time interface dialog box.
- ✓ Click on the *SELECT Product Number* line.
- ✓ Click on the **Move Up** button twice. Now the first information the user will be asked for is the range of product numbers to include in their report.

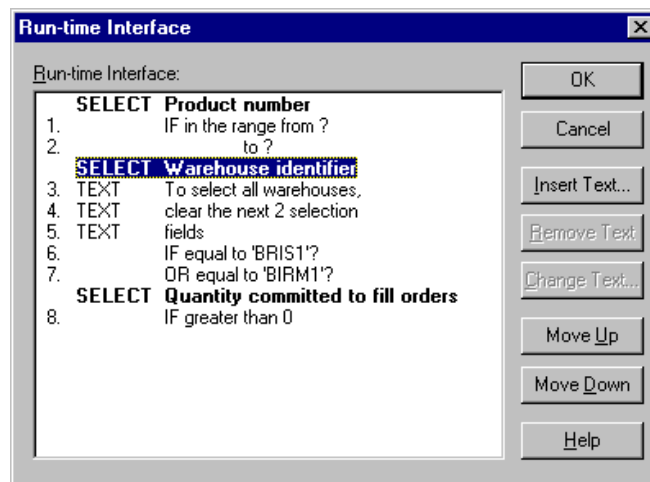


- ✓ Click on the *SELECT Warehouse Identifier* line.
- ✓ Click on the **Insert Text** button. Jacana displays the Run-time text dialog box.

- √ Enter the text  
*To select all warehouses, clear the next 2 selection fields.*



- ➔ You can use **Ctrl+Enter** to force a line break and move to the next line in the Run-time text box
- √ Click **OK**. Jacana displays the Run-time interface dialog box.



- √ Click **OK**.
- √ Click on the **Save** button or choose **Save** from the **File** menu. Save your report definition as **JACxxx06.REP**, where **xxx** are your initials.
- √ Choose the **Close** option from the **File** menu.

This completes exercise six. You have now seen more of the Specifications dialog box. You used the Specifications dialog box to create and include select/omit selections in the report definition. You have also edited the run-time interface.

▲ *Exercise Seven*

**Objective:** Modify the report from exercise six to accept a user supplied value for *price increase percentage* and use this to print a new margin on quantity on hand. On completion of this exercise, the report should look similar to this:

```

JACiii07X                XXXXXXXXXXXXXJacana ExercisesXXXXXXXXXXXXX                Page 9999
User . . . . . : XXXXXXXXXXXX                HH:MM:SS DD/MM/YY
From product # XXXXXX To product # XXXXXX Price increase % . : 99999.99

Warehouse ID . . . : XXXXX
Warehouse Desc. . : XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

Product      Product      Product      Date of      Margin
Number      Quantity  Purchase   Last        Quantity
Description  Identity  On hand    Price       Stocktake   on hand
-----
XXXXXXXXXXXXXXXXXXXX  XXXXXX  9999999-  99999.99-  99/99/99  99999.99-  XXX  99999.99-
XXXXXXXXXXXXXXXXXXXX  XXXXXX  9999999-  99999.99-  99/99/99  99999.99-  XXX  99999.99-
XXXXXXXXXXXXXXXXXXXX  XXXXXX  9999999-  99999.99-  99/99/99  99999.99-  XXX  99999.99-
XXXXXXXXXXXXXXXXXXXX  XXXXXX  9999999-  99999.99-  99/99/99  99999.99-  XXX  99999.99-
XXXXXXXXXXXXXXXXXXXX  XXXXXX  9999999-  99999.99-  99/99/99  99999.99-  XXX  99999.99-
Total for this warehouse 999999999- 9999999.99-
Report total           999999999- 9999999.99-
    
```

Note: Guide only. Some characters not positioned exactly.

**New concepts:**

- report parameters

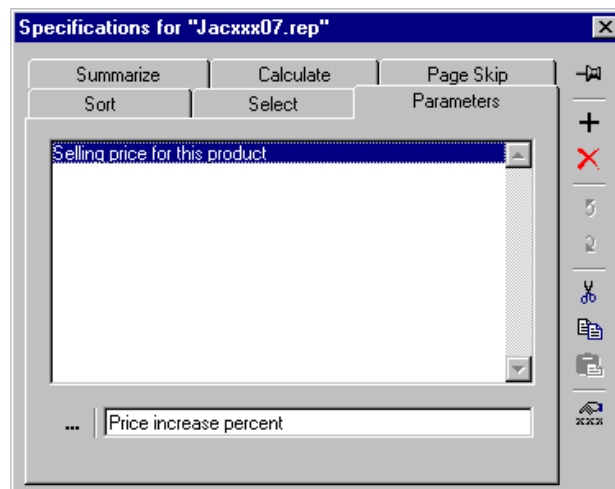
Getting started


- ✓ Click on the **New** button or choose the **New** option from the **File** menu. Jacana displays the **New Report** dialog box.
- ✓ Choose the *Copy an existing report* option.
- ✓ Choose the report definition you created in the last exercise, **JACxxx06.REP**, from the drop-down list.
- ✓ Click **OK**. Jacana displays the report definition.
- ✓ Click on the **Specifications** button or choose the **Specifications** option from the **Report** menu. Jacana displays the **Specifications** dialog box.

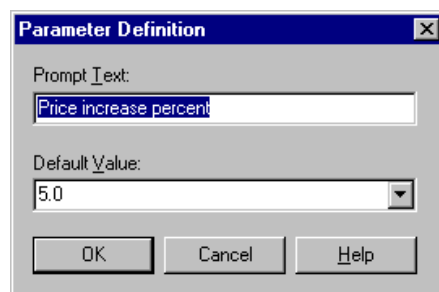
## Report parameters

Here you will define a field which will accept a user supplied value for *price increase percentage*.

- √ Click on the **Parameters** tab.
- √ Click on the Working list button in the DataCrafter. Jacana displays the working list of fields in the DataCrafter.
- √ Use the left mouse button to drag-and-drop the *Selling price for this product* field into the Parameters list box.




- √ Click on the Extended definition button.  Jacana displays the Parameter definition dialog box. You can set the prompt text and default value for the parameter. The default value is used if the user does not enter a value when they run the report.
- √ Enter the text *Price increase percent* in the Prompt text box.
- √ Enter the value *5.0* in the Default value box.



- √ Click **OK**. Jacana displays the Specifications dialog box.

- √ Click on the **Close** button.


Here you will print the above parameter in the report heading.

- √ Click on the Pick Parameters button in the DataCrafter.   
Jacana displays the parameter fields in the DataCrafter.
- √ Use the right mouse button to drag-and-drop the *Price increase percent* field into your report layout. Place it next to *to product #* field (on the third line).
- √ Choose the *Field and label* option from the shortcut menu.  
You have just added a new piece of information to the report. This is the price increase percent the user entered and is calculated for the report.

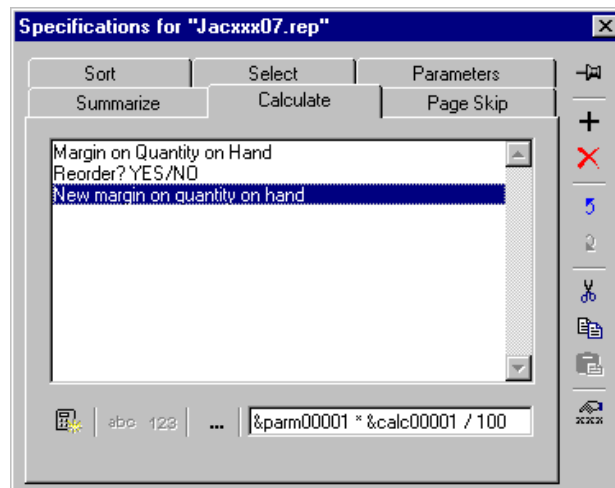
Here you make a new calculation field to print the *margin on quantity on hand* based on the above parameter.


- √ Click on the Specifications button or choose the **Specifications** option from the **Report** menu. Jacana displays the Specifications dialog box.
- √ Click on the **Calculate** tab.
- √ Click on the Working list button in the DataCrafter. Jacana displays the working list of fields in the DataCrafter.
- √ Use the left mouse button to drag-and-drop the *Margin on Quantity on hand* field into the Calculate list box.
- √ Click on the **Properties** button. Jacana displays the Properties dialog box.
- √ Click on the **Text** tab.
- √ Enter the following text into the appropriate box.

| In this box | Enter this text                |
|-------------|--------------------------------|
| Description | New margin on quantity on hand |
| Left text   | New margin                     |
| Right text  | New margin                     |
| Headings    | New margin                     |

- √ Click **OK**. Jacana returns to the Specifications dialog box.
- √ Click on the Calculation builder button. Jacana displays the Calculation builder dialog box.
- √ Click on the Working List button.   
Jacana displays the working list of fields in the DataCrafter.
- √ Build this expression by dragging in fields from the DataCrafter and by using the buttons on the Calculation builder dialog box.  
$$\&parm0001 * \&calc0001 / 100$$

This is: price increase percent multiplied by the margin on quantity on hand divided by 100.
- √ Click **OK** to complete the calculation. You have just created a workfield that calculates the new margin on the quantity on hand.



- √ Click on the **Close** button to close the Specifications dialog box.
- √ Click on the Pick Calculations button on the DataCrafter.   
Jacana lists the calculated workfields in the DataCrafter.
- √ Use the right mouse button to drag-and-drop the *New margin on quantity on hand* field into your report layout. Place it next to *Reorder? Yes/No* in the detail line, so as to make a new column.

- √ Choose the *Field and heading* option from the shortcut menu. You have just added a new column to the report showing the new margin with the price increase percent. You have now added a 'what-if' scenario to the report. This allows the user to see what happens if the price is increased by a percentage that they can enter.

| Date of Last Stocktake | Margin Quantity on hand | Reorder? YES/NO | New margin |
|------------------------|-------------------------|-----------------|------------|
| 99/99/99               | 99999.99-               | XXX             | 99999.99-  |
| 99/99/99               | 99999.99-               | XXX             | 99999.99-  |
| 99/99/99               | 99999.99-               | XXX             | 99999.99-  |
| 99/99/99               | 99999.99-               | XXX             | 99999.99-  |
| 99/99/99               | 99999.99-               | XXX             | 99999.99-  |
| 99/99/99               | 99999.99-               | XXX             | 99999.99-  |

Here you will add instruction to the run-time interface to aid the user when they run this report.

- √ Click on the Run-time Interface button. Jacana displays the Run-time interface dialog box.
- √ Click on the *PARM Price increase percent* line.
- √ Click on the **Insert Text** button. Jacana displays the Run-time text dialog box.
- √ Enter the text *Enter the price increase percentage for calculating the new margins.*
- √ Click **OK**. Jacana displays the Run-time interface dialog box.
- √ Click on the *PARM Price increase percent* line.
- √ Click on the Move Down button until the parameter is below the text added in the above steps.
- √ Click **OK**.
- √ Click on the Save button or choose **Save** from the **File** menu. Save your report definition as JACxxx07.REP, where xxx are your initials.
- √ Choose the **Close** option from the **File** menu.

That completes exercise seven. You have now seen more of the Specifications dialog box. You used the Specifications dialog box to create and include parameters and calculated workfields in the report definition. You have also edited the run-time interface.

▲ *Exercise Eight*

**Objective:** Modify the report from exercise seven to show the maximum margin on quantity on hand. On completion of this exercise, the report should look similar to this:

|                             |  |                                 |                        |                        |                         |                 |            |
|-----------------------------|--|---------------------------------|------------------------|------------------------|-------------------------|-----------------|------------|
| JACiii08X                   | XXXXXXXXXXXXJacana ExercisesXXXXXXXXXXXX | Page 99999                      |                        |                        |                         |                 |            |
| User . . . . .              | : XXXXXXXXXX                             | HH:MM:SS DD/MM/YY               |                        |                        |                         |                 |            |
| From product #              | XXXXXX To product # XXXXXX               | Price increase % . . : 99999.99 |                        |                        |                         |                 |            |
| Warehouse ID . . . .        | : XXXXX                                  |                                 |                        |                        |                         |                 |            |
| Warehouse Desc. . .         | : XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX        |                                 |                        |                        |                         |                 |            |
| Product Description         | Product Number                           | Quantity On hand                | Product Purchase Price | Date of Last Stocktake | Margin Quantity on hand | Reorder? YES/NO | New margin |
| XXXXXXXXXXXXXXXXXXXX        | XXXXXX                                   | 9999999-                        | 99999.99-              | 99/99/99               | 99999.99-               | XXX             | 99999.99-  |
| XXXXXXXXXXXXXXXXXXXX        | XXXXXX                                   | 9999999-                        | 99999.99-              | 99/99/99               | 99999.99-               | XXX             | 99999.99-  |
| XXXXXXXXXXXXXXXXXXXX        | XXXXXX                                   | 9999999-                        | 99999.99-              | 99/99/99               | 99999.99-               | XXX             | 99999.99-  |
| XXXXXXXXXXXXXXXXXXXX        | XXXXXX                                   | 9999999-                        | 99999.99-              | 99/99/99               | 99999.99-               | XXX             | 99999.99-  |
| XXXXXXXXXXXXXXXXXXXX        | XXXXXX                                   | 9999999-                        | 99999.99-              | 99/99/99               | 99999.99-               | XXX             | 99999.99-  |
| XXXXXXXXXXXXXXXXXXXX        | XXXXXX                                   | 9999999-                        | 99999.99-              | 99/99/99               | 99999.99-               | XXX             | 99999.99-  |
| Total for this warehouse    |  | 999999999-                      |                        |                        | Total 9999999.99-       |                 |            |
| Report total                |  | 999999999-                      |                        |                        | Maximum 99999.99-       |                 |            |
| Number of warehouses listed |  | 9999999                         |                        |                        | Total 9999999.99-       |                 |            |
|                             |  |                                 |                        |                        | Maximum 99999.99-       |                 |            |
| JACiii08X                   | XXXXXXXXXXXXJacana ExercisesXXXXXXXXXXXX | Page 99999                      |                        |                        |                         |                 |            |

Note: Guide only. Some characters not positioned exactly.

**New concepts:**

- Using other summary types

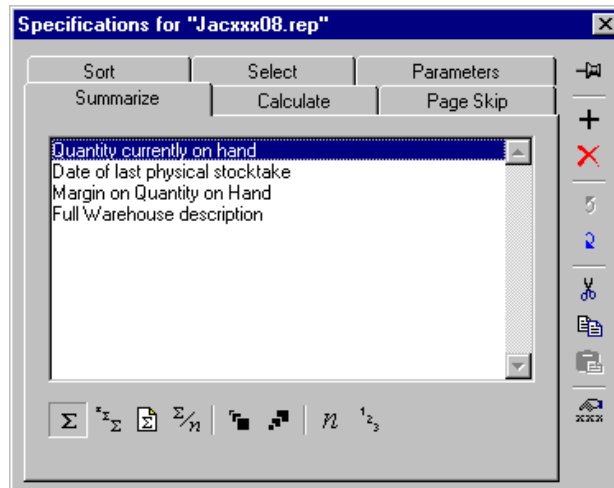
Getting started




- √ Click on the **New** button or choose the **New** option from the **File** menu. Jacana displays the **New Report** dialog box.
- √ Choose the *Copy an existing report* option.
- √ Choose the report definition you created in the last exercise, **JACxxx07.REP**, from the drop-down list.
- √ Click **OK**. Jacana displays the report definition.
- √ Click on the **Specifications** button or choose the **Specifications** option from the **Report** menu. Jacana displays the **Specifications** dialog box.


## Using other summary types

Here you will make the report print the maximum margins for warehouse and for the whole report.



- ✓ Click on the **Summarize** tab.



- ✓ Click on the *Margin on Quantity on Hand* line.
- ✓ Click on the Maximum button , or use the right mouse button to click on the field and choose **Maximum** from the menu. This has now added a maximum field/value that will contain the highest value found for this field when the report is run. You can use this summary field in your report.
- ✓ Click on the **Close** button.
- ✓ Click on the Pick Summary Fields button in the DataCrafter.  Jacana now displays the summary fields in the DataCrafter.
- ➡ You could use the  button to select the kind of summary fields you want.
- ✓ Use the left mouse button to drag-and-drop the *Maximum of margin of quantity on hand by warehouse desc.* field into your report layout. Place it beneath the first total for Margin quantity on hand.
- ✓ Type appropriate text next to this field, e.g. *Maximum*.
- ✓ Type appropriate text next to the total field on the line above to distinguish it from the maximum, e.g. *Total*.

- √ Click on the line showing report level totals.
- √ Click on the insert line after button on the layout toolbar . This will insert another report level totals line into the report layout, below the current line.
- √ Use the left mouse button to drag-and-drop the *Maximum of margin of quantity on hand for report* field into your report layout. Place it beneath the other totals for Margin quantity on hand.
- √ Type appropriate text next to this field, e.g. *Maximum*.
- √ Type appropriate text next to the total field on the line above to distinguish it from the maximum, e.g. *Total*.
- √ Use the layout toolbar to increase the space before this line to 2.

Here you will make the report print the number of warehouses printed in the report

- √ Click on the Specifications button or choose the **Specifications** option from the **Report** menu. Jacana displays the Specifications dialog box.
- √ Click on the **Summarize** tab.
- √ Click on the Working list button in the DataCrafter.
- √ Use the left mouse button to drag-and-drop the *Full warehouse description* field into the Summarize list box.
- √ Click on the Count unique values button.  In this example, this will give us a count of the number of warehouses included in the report.
- ➔ When you ask Jacana to summarize an alphabetic field, the default is to count the records. In this case we require the number of unique values.
- √ Click on the Records button.  This turns off the summary value that indicates the number of records or occurrences for this field.
- √ Click on the **Close** button.
- √ Click on the *Pick Summary fields* button in the DataCrafter.

- √ Use the left mouse button to drag-and-drop the *Unique count of full warehouse description for report* field into your report layout. Place it toward the left-hand side of the last report line.
- √ Check to see that you are in over-type mode (the OVR indicator on the status bar should not be grayed).
- √ Type appropriate text next to this field, e.g. *Number of warehouses listed*.

|                             |            |                   |
|-----------------------------|------------|-------------------|
| Report total                | 999999999- | Total 9999999.99- |
| Number of warehouses listed | 9999999    | Maximum 99999.99- |

- √ Click on the Save button or choose **Save** from the **File** menu. Save your report definition as JACxxx08.REP, where xxx are your initials.
- √ Choose the **Close** option from the **File** menu.

This completes exercise eight. You have now seen more of the Specifications dialog box. You used the Specifications dialog box to create and include summary values, including totals in the report definition.

## ▲ Exercise Nine

**Objective:** Create a stock valuation report by warehouse area in a matrix grid. On completion of this exercise, there should be two reports that should look similar to these:

|           |  |             |          |             |          |             |          |                   |       |
|-----------|--|-------------|----------|-------------|----------|-------------|----------|-------------------|-------|
| JACiii09X | XXXXXXXXXXXXXXXXXXXXMatrix viewXXXXXXXXXXXXXXXXXXXX      |             |          |             |          |             |          | Page 99999        |       |
|           |  |             |          |             |          |             |          | HH:MM:SS DD/MM/YY |       |
| Product   | 2  | 2           | 3        | 3           | *OTHER   | *OTHER      | X-Total  | X-Total           |       |
| Number    | Quantity   | Extended    | Quantity | Extended    | Quantity | Extended    | Quantity | Extended          |       |
| Identity  | On hand  | Price       | On hand  | Price       | On hand  | Price.      | On hand  | Price             |       |
| -----     | -----  | -----       | -----    | -----       | -----    | -----       | -----    | -----             | ----- |
| XXXXXX    | 99999-   | 9999999.99- | 99999-   | 9999999.99- | 99999-   | 9999999.99- | 99999-   | 9999999.99-       |       |
| XXXXXX    | 99999-   | 9999999.99- | 99999-   | 9999999.99- | 99999-   | 9999999.99- | 99999-   | 9999999.99-       |       |
| XXXXXX    | 99999-   | 9999999.99- | 99999-   | 9999999.99- | 99999-   | 9999999.99- | 99999-   | 9999999.99-       |       |
| XXXXXX    | 99999-   | 9999999.99- | 99999-   | 9999999.99- | 99999-   | 9999999.99- | 99999-   | 9999999.99-       |       |
| XXXXXX    | 99999-   | 9999999.99- | 99999-   | 9999999.99- | 99999-   | 9999999.99- | 99999-   | 9999999.99-       |       |
| XXXXXX    | 99999-   | 9999999.99- | 99999-   | 9999999.99- | 99999-   | 9999999.99- | 99999-   | 9999999.99-       |       |
| JACiii09X | XXXXXXXXXXXXXXXXXXXXJacana ExercisesXXXXXXXXXXXXXXXXXXXX |             |          |             |          |             |          | Page 99999        |       |

Note: Guide only. Some characters not positioned exactly.

|                               |  |                                |                              |
|-------------------------------|--|--------------------------------|------------------------------|
| JACiii09X                     | XXXXXXXXXXXXXXXXXXXXSimple viewXXXXXXXXXXXXXXXXXXXX      | Page 9999<br>HH:MM:SS DD/MM/YY |                              |
| Product<br>Number<br>Identity | Warehouse<br>Post<br>Code                                | Quantity<br>On hand            | Extended<br>Selling<br>Price |
| -----                         | -----  | -----                          | -----                        |
| XXXXXX                        | XXXX   | 99999-                         | 9999999.99-                  |
| XXXXXX                        | XXXX   | 99999-                         | 9999999.99-                  |
| XXXXXX                        | XXXX   | 99999-                         | 9999999.99-                  |
| XXXXXX                        | XXXX   | 99999-                         | 9999999.99-                  |
| XXXXXX                        | XXXX   | 99999-                         | 9999999.99-                  |
| XXXXXX                        | XXXX   | 99999-                         | 9999999.99-                  |
| JACiii09X                     | XXXXXXXXXXXXXXXXXXXXJacana ExercisesXXXXXXXXXXXXXXXXXXXX | Page 9999                      |                              |

Note: Guide only. Some characters not positioned exactly.

## New concepts:

- Matrix columns
- Multi-sheet reports

## Getting started

- ✓ Click on the **New** button or choose the **New** option from the File menu. Jacana displays the New Report dialog box.
- ✓ Choose the *ReportWizard* option. Click **OK**.
- ✓ If Jacana shows the Choose Wizard dialog box, choose the standard ReportWizard and click **OK**
- ✓ Jacana displays the first ReportWizard dialog box.
- ✓ Click on the **Next** button. Jacana displays the data selection dialog box.
- ✓ Select the DEMOINVENT data source from the drop down list.
- ➔ If this data source is not shown on the drop down list, click on the **Choose Data** button. Jacana displays the Choose Data dialog box. Choose the **Subset** tab. Choose the DEMOINVENT subset. Click **OK**.
- ✓ Click on the **Next** button. Jacana displays the fields dialog box.
- ✓ Add the following fields to the working list:
  - » Product number
  - » Quantity currently on hand

- » Extended selling price
- » Warehouse Post code
- √ Click on the **Next** button. Jacana displays the next dialog box. You have now finished choosing the fields to include in your report.
- √ Click on the **Next** button. Jacana displays the sorting dialog box.
- √ Double-click on the *Product number* field. You have now specified data in this report is sorted by product number down the page.
- √ Click on the **Next** button. Jacana displays the select/omit dialog box.
- √ Click on the **Next** button. There is no select/omit in this exercise. Jacana displays the totals dialog box.
- √ Click on the **Next** button. It is not necessary to specify totals with matrix style reports. Jacana displays the next dialog box.

## Matrix specifications

- √ Click on the **Next** button. Choose the option Yes for matrix columns.
- √ Click on the **Next** button. Jacana displays the matrix column condition field dialog box.

The matrix column condition field is used to create conditions that will make multiple columns. In this exercise you will use *Warehouse Post code*.

- √ Double-click on *Warehouse Post code*.
- √ Click on the **Next** button. Jacana displays the matrix column condition dialog box.


The column conditions are:

- ◆ Warehouse Post code starts with 2
- ◆ Warehouse Post code starts with 3
- ◆ All other post codes

- √ Specify the following in the first two rows:

| Row | Operator | Value |
|-----|----------|-------|
| 1   | ST       | 2     |
| 2   | ST       | 3     |

- ➔ To Enter ST, you will need to choose it from the pull-down list.

- √ In the third row of conditions, click on the condition builder button.  
 Jacana displays the Advanced Matrix Condition dialog box. You can use this dialog box to build complex conditions.

- √ Click on Condition **Equal to**.
- √ Click on Compare Value(s) **Other values**.
- √ Click **OK**. Jacana displays the matrix column condition dialog box.
- √ Click on the **Next** button. Jacana displays the matrix column fields dialog box.

Each matrix column condition has a column for *Quantity currently on hand* and a column for *Extended Selling price*.

- √ Double-click on *Quantity currently on hand*.
- √ Double-click on *Extended Selling price*.
- √ Click on the **Next** button. Jacana displays the next dialog box.
- √ Click on the **Next** button. Jacana displays the output dialog box.
- √ Choose the *Print* option. Click on the **Next** button. Jacana displays the details dialog box.

Detail is not needed on this report. You only need to show figures summarized for *Product number*.

- √ For matrix reports, the default is to summarize data. The level shown is *Product number*, which is what you want. Click on the **Next** button. Jacana displays the style dialog box.
- √ Choose the *Columnar* option.
- √ Click on the **Next** button. Jacana displays the field order dialog box.


The matrix column fields have already been chosen for output. These are shown already in the Field output order.

- √ Double-click Product number to print in your report:
- √ Click on the **Next** button. Jacana displays the title dialog box.
- √ Enter a title and name for your report. Enter the name JACxxx09, where *xxx* are your initials and the title *Jacana exercises*.
- √ Click on the **Finish** button. The ReportWizard will now create your report definition based on the answers you gave. Jacana displays your report definition.

## Multi-sheet reports

Now you will add a second sheet to the report that prints from the same extracted data, but prints a simple layout instead of a matrix layout.

First give the current sheet a new name.

- √ Click on the **Sheets** button in the toolbar.  Jacana displays the sheets dialog.
- √ Click on the **Sheets** button. Jacana displays a menu.
- √ Click on the **Properties** menu item. Jacana displays the Sheet Properties dialog.
- √ Click on the **General** tab and type *Matrix view* in the sheet description edit box.
- √ Click on the **OK** button.

Create a new sheet.

- √ Click on the **Sheets** button. Jacana displays a menu.
- √ Click on the **New** menu item. Jacana displays the New Sheet dialog.
- √ Click on the **LayoutWizard** option.  
NOTE: All the sheets of a report share the same specifications, including sorting, summary and matrix. This is why a LayoutWizard is shown and not a ReportWizard.

- √ Click on the **OK** button.
- √ If Jacana shows the Choose Wizard dialog box, choose the standard LayoutWizard and click **OK**

Jacana starts the wizard.


- √ The output medium is not changed. Click on the **Next** button.
- √ This sheet will show detail records. Choose **Yes** and click on the **Next** button.
- √ The output style is not changed. Click on the **Next** button.
- √ This sheet will not use the report matrix. Choose **No** and click on the **Next** button.
- √ Click on the >> button, selecting all the fields for output and click on the **Next** button.
- √ Type *Simple View* in the sheet description edit box.
- √ Click on the **Finish** button. Jacana creates the new sheet.
- √ Choose **Cascade** from the **Window** menu. You will see the report has now two windows for this report. One is showing the matrix view, the other the simple view.

Now we have created the second sheet, we realize we don't wish to show any records with no stock.


- √ Click on the Specifications button or choose the **Specifications** option from the **Report** menu. Jacana displays the Specifications dialog box.
- √ Click on the **Select/Omit** tab.
- √ Type *On hand* into the *Pick Fields Containing* box in the DataCrafter.
- √ Use the left mouse button to drag-and-drop *Quantity currently on hand* field into the Select/Omit list box.
- √ Change the select expression from *\*if &qohd = ?* to *\*if &qohd > 0?*.  
NOTE: This selection rule applies to all sheets in the report.
- √ Click on the **Close** button to close the specifications dialog.

## Adding a null report sheet

When a report is run, and no data is found, you can define a special sheet to explain why the other report sheets do not print. To achieve this, a null report sheet is used. Null report sheets only print when no data is selected. When this occurs, a null sheet is printed for each of the other report sheets.

- √ Click on the **Sheets** button in the toolbar.  Jacana displays the sheets dialog.
- √ Click on the **Sheets** button. Jacana displays a menu.
- √ Click on the **New** menu item. Jacana displays the New Sheet dialog.
- √ Click on the **Blank sheet using output medium** option.
- √ Click on the **OK** button. Jacana creates a blank sheet.
- √ Click on the first column heading line.
- √ Click on the **line properties** button.
- √ Click on the *Print on line* option and change the line number to 20.
- √ Click on the **OK** button. Jacana closes the line properties dialog.
- √ Type the text *No data to report for quantity on hand greater than* in the current line.
- √ Click on the **Click Selection Values** button in the DataCrafter.
- √ Use the left mouse button to drag-and-drop *Selection value 1 for Qty On Hand* field onto the current line.
- √ 

|  |
|--|
| No data to report for quantity on hand greater than 9999999- |
|--|

 Click on the next column heading line. Click the **Delete line** button five times to delete each of the remaining column heading lines, the detail lines and the report totals line.
- √ Click on the **Sheets** button in the toolbar.  Jacana displays the sheets dialog.
- √ Click on the **Sheets** button. Jacana displays a menu.
- √ Click on the **Null report sheet** menu item. The red dot over the printer icon in the sheet list indicates this report is a null report sheet.

- √ Click on the **Close** button.
- √ Click on the Save button or choose **Save** from the **File** menu. Save your report definition as JACxxx09.REP, where xxx are your initials.
- √ Choose the **Close** option from the **File** menu.

This completes exercise nine. You have now created a matrix style multi-sheet report.

## ▲ *Exercise ten*

**Objective:** Create a file report showing product stock levels. The output should be suitable for downloading to a spreadsheet application on a PC.

### **New concepts:**

- Using PC file as an output medium.
- Record layout view.

### Getting started



- √ Click on the New button or choose the **New** option from the File menu. Jacana displays the Jacana dialog box.
- √ Choose the *ReportWizard* option. Click **OK**.
- √ If Jacana shows the Choose Wizard dialog box, choose the standard ReportWizard and click **OK**
- √ Jacana displays the first ReportWizard dialog box.
- √ Click on the **Next** button. Jacana displays the data selection dialog box.
- √ Select the DEMOINVENT data source from the drop down list. Click on the **Next** button. Jacana displays the fields dialog box.
- √ Choose the fields to include in the report definition. Include these fields in this order:

- » Warehouse identifier
- » Full warehouse description
- » Product description
- » Product number
- » Quantity currently on hand
- √ Click on the **Next** button. Jacana displays the next dialog box. You have now finished choosing the fields to include in your disk report.
- √ Click on the **Next** button. Jacana displays the sorting dialog box.
- √ Sort the disk report by *Warehouse identifier* and the *Product description* fields.
- √ Click on the **Next** button. Jacana displays the select/omit dialog box.
- √ Double-click on the *Warehouse identifier* field. You have now specified that when a user asks for this disk report to run, they will be prompted to choose which warehouse to include.
- √ Click on the **Next** button. Jacana displays the totals dialog box.
- √ Double-click on the *Quantity currently on hand* field. You have now specified that the report will include totals for the quantity on hand.
- √ Click on the **Next** button. Choose the option for No matrix columns. Jacana displays the next dialog box.
- √ Click on the **Next** button. You have now finished the specifications part of the ReportWizard.
- √ Click on the **Next** button. Jacana displays the output dialog box.
- √ Choose the *Format for PC download* option.
- √ Choose the Microsoft Excel Symbolic Link PC format (.XLK). You have now specified the report output is to be formatted for use with Microsoft Excel. Click on the **Next** button. Jacana displays the details dialog box.
- √ Choose the *No, summarize to level* option
- √ Choose to summarize to level *Product description*.
- √ Click on the **Next** button. Jacana displays the field order dialog box.

- √ Choose the order you want the fields shown in. Since you chose the fields in a specific order initially, click on the >> button. This chooses all the fields.
- √ Click on the **Next** button. Jacana displays the title dialog box.
- √ Enter a title for your report. Enter the name JACxxx10, where xxx are your initials and the title *Jacana exercises*.
- √ Click on the **Finish** button.

The ReportWizard will now create your disk report definition, based on the answers you gave. You will notice the report does not use the familiar **Page layout** view, but **Record layout** view.

You now reconsider. You no longer want to show *Warehouse description* and you want *Product number* before *Product description*.

- √ Click on field *Warehouse description* line in the field name column.
- √ Click on the **Delete field** button in the layout toolbar. 
- √ Click on field *Product number*.
- √ Click on the **Move field up** button in the layout toolbar. 
- √ Click on the Save button or choose **Save** from the **File** menu. Save your report definition as JACxxx10.REP, where xxx are your initials.
- √ Choose the **Close** option from the **File** menu.

This completes exercise ten. You designed a report for PC download and used Record Layout View for designing your output.

## ▼ *Appendix A: Technical specifications*

---

### ▲ *Jacana files*

When you install Jacana, the following files are copied onto your PC's hard disk.

| <b>Filename</b> | <b>Directory installed in</b> | <b>Description</b>  |
|-----------------|-------------------------------|---|
| JACANA.EXE      | Jacana                        | Jacana main program                                       |
| JACANA.HLP      | Jacana                        | Jacana on-line help                                       |
| JACANA.RET      | Jacana                        | Jacana report template used for creating new reports      |
| JACADMIN.EXE    | Jacana                        | Jacana settings for administrators                        |
| JACADMIN.HLP    | Jacana                        | Jacana settings help                                      |
| OXG4100.ENU     | Jacana                        | Vendor specific resources used by Jacana (English(US))    |
| OXG4101.ENU     | Jacana                        | Resources used by Jacana and Jacana wizards (English(US)) |
| OXG4102.DLL     | Jacana                        | Common classes and functions                              |
| OXG4103.DLL     | Jacana                        | ReportWizard  |
| OXG4104.DLL     | Jacana                        | Jacana server for AS/400                                  |
| OXG4109.DLL     | Jacana                        | EBCDIC/ASCII conversion                                   |
| OXG4109.MAP     | Jacana                        | EBCDIC/ASCII conversion table                             |

| <b>Filename</b> | <b>Directory installed in</b> | <b>Description</b>                      |
|-----------------|-------------------------------|---|
| OXG4107.DLL     | Jacana                        | Jacana settings                         |
| OXG4108.DLL     | Jacana                        | Jacana settings for host product server |
| MFC40.DLL       | Windows system <sup>1</sup>   | Microsoft Foundation Classes            |
| MSVCT40.DLL     | Windows system <sup>1</sup>   | C runtime library                       |
| HDK3AN32.DLL    | Windows <sup>2</sup>          | Used with distributed .hlp files        |
| HDK3CT32.DLL    | Windows <sup>2</sup>          | Used with distributed .hlp files        |

1. These Microsoft redistributeable files will only be installed if the file is not found or is found to be an earlier version.
2. These HDK redistributeable files will only be installed if the file is not found or is found to be an earlier version.

## Other file information

- ◆ The default setting for storing locally saved report definitions is a sub-directory called LOCAL, e.g., C:\JACANA\LOCAL.
- ◆ Jacana uses the default extension .REP for locally saved report definitions.
- ◆ If the report name in the server product was longer than eight characters, when it is saved locally the name is truncated
- ◆ Jacana creates a file for each server system you connect to. These have the extension .SYS.
- ◆ Jacana creates a file for each data source you use. These have the extension .DTA.
- ◆ Jacana creates a file for global data (function and print macros) for each host product library. These have the extension .GLB.
- ◆ Files installed into your Windows directory are supplied from Microsoft C++ Version 4.0 or later.

## ▼ *Index*

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### ■ \$

\$\$LICENSE command, 12

### ■ A

About this guide, 1

Adding

fields into your report definition, 58

sheets, 92

text to your report definition, 61

Advanced tasks, 101

All about Jacana, 17

AS/400

selecting, 52

Averages, 71

### ■ B

Banner page, 91

Basic tasks, 49

Basics

reportings, 4

Before installing Jacana, 11

Buttons, 20

### ■ C

Calculate tab, 72

Calculation Builder

dialog box, 74

Calculations, 72

Changing

your output settings, 114

your server, 122

Characters per inch. *See* Output settings

Checking

the field properties, 108

the report properties, 111

version, 126

your data source, 106

Choosing

and locating toolbars, 25

the fields to use, 57

Columns

matrix, 82

Communications

protocol, 12, 43

Condition builder, 76

Condition Builder

dialog box, 77

Conditioning

line, 95

Connection

Set AS/400 server, 27

Connection Wizard, 42

Control page, 91

Conventions, 3

Creating

a new report definition, 50

a report template, 121

### ■ D

Data menu, 36

Data source, 9

checking the, 106

creating a report definition from, 52

Data toolbar, 24

Databases, 4

fields, 6

files, 5

DataCrafter, 18

Changing size, 18

Definitions, 9

Disk, 117

Download

PC, 118

## ■ E

Edit menu, 28  
Editing the run-time interface, 119  
Error messages, 123  
Exercises, 129  
Exit, 45  
Exiting Jacana, 45

## ■ F

Field  
    appearance, 97  
    properties, 108  
Fields, 4  
    adding into a report definition, 58  
    choosing, 57  
    past right boundary, 61  
    removing, 61  
File menu, 26  
Files, 4  
    Jacana, 184  
Filtering the picking list, 102  
Filters  
    Quick, 49, 101  
    using, 101  
    using QuickFilters, 102  
Form type. *See* Output settings  
Full screen mode, 31

## ■ G

Getting results, 49  
Groups, 105

## ■ H

Hands-on exercises, 129  
Help, 3  
    menu, 39  
    on-line, 3  
Hold output. *See* Output settings  
How to  
    install Jacana, 14  
    use this guide, 2

## ■ I

Incompatible levels, 124  
Installing Jacana, 14  
    custom, 15  
    default, 15  
Insufficient memory, 124

## ■ J

Jacana  
    all about, 17  
    exiting, 45  
    files, 184  
    installing, 14  
    starting, 40  
    starting for the first time, 41  
    templates, 121  
    Using - advanced tasks, 101  
    Using - an introduction, 40  
    Using - basic tasks, 49  
    What is it?, 8  
    window, 17

## ■ K

Keyboard shortcuts, 46

## ■ L

Layout  
    menu, 33, 35  
    window, 18  
Layout toolbar  
    Page view, 22  
    Record view, 23  
LayoutWizards, 49, 89  
library  
    selecting, 52  
Line  
    conditioning, 95  
    properties, 93  
    Show types, 97  
    types, 96  
Lines per inch. *See* Output settings

List  
picking, 10  
working, 10

## ■ M

Map, 104  
Matrix  
Column conditions, 83, 87  
Column fields, 83, 88  
Matrix columns, 82  
Memory  
insufficient, 124  
Menus, 20, 26  
Data, 36  
Edit, 28  
File, 26  
Help, 39  
Layout, 33, 35  
Report, 32  
shortcuts, 39  
Tools, 37  
View, 30  
Window, 37  
Messages  
error, 123  
from the server product, 123  
other, 124  
Microsoft Windows, 1  
Missing products, 124  
Modifying an existing report definition, 54  
More About, 3, 52, 53  
Mouse, 45, 58  
right button usage, 45

## ■ N

Need help?, 3  
Notes. *See* More About  
Null report sheet, 90

## ■ O

Omit, 66  
On-line help, 3  
Output medium  
disk, 117

PC download, 118  
printer, 115  
workstation, 116  
Output queue. *See* Output settings  
Output settings, 114  
Override print controls, 94, 115

## ■ P

Page  
break, 80  
skipping, 80  
Page rotation. *See* Output settings  
Page skip tab, 80  
Parameter, 10, 69  
Definition dialog box, 70  
run-time, 69  
Parameters tab, 69  
PC  
downloads, 118  
Picking list, 10  
filtering, 102  
Printer, 115  
Printing  
report definition layout, 99  
Processing modes, 112  
Properties, 10  
field, 108  
line, 93  
report, 111  
sheet, 90

## ■ Q

QuickFilters, 49, 101

## ■ R

Records, 4  
Refining your report  
appearance, 89  
contents, 62  
matrix columns, 82  
Removing fields from a report definition, 61  
Report, 7, 10  
menu, 32  
properties, 111

- sheet, 10, 90
- Specifications, 62
- Report definition
  - adding fields, 58
  - adding text, 61
  - creating a new, 50
  - matrix columns, 82
  - modifying an existing, 54
  - print preview, 99
  - printing the layout, 99
  - refining the appearance, 89
  - refining the contents, 62, 82
  - removing fields, 61
  - saving, 55
  - using a data source to create new, 52
  - using an existing report to create new, 51
- Report line types, 96
- Report sheet, 10, 90
- Report Sheet
  - adding, 92
- Reporting, 7
- Reports
  - internal name, 113
  - processing modes, 112
  - security, 111
- ReportWizard, 49
  - Using a, 50
- Requirements
  - System, 13
- Router
  - not loaded, 124
- Ruler, 19
- Run-time
  - interface, 119
  - parameters, 69

## ■ S

- Save As, 55
- Save output. *See* Output settings
- Saving, 55
  - your report definition, 55
- Security
  - report access, 111
- Select builder
  - dialog box, 67
- Select tab, 66
- Select/Omit, 66
- Selecting, 66

- Server, 27
  - changing, 122
- Server product, 8
- Setting
  - a field's appearances, 97
  - the line properties, 93
  - the sheet properties, 90
- Settings
  - output, 114
- Setup types, 15
- Sheet, 10
  - adding, 92
  - properties, 90
- Sheet toolbar, 23
- Shortcut menus, 39
- Shortcuts
  - keyboard, 46
  - menus, 39
- Show line types, 31
  - resizing, 97
- Skipping a page, 80
- Sort tab, 64
- Sorting, 64
- Source
  - data, 9, 106
- Specifications, 62
  - Calculate, 72
  - Conditions, 76
  - Page Skip, 80
  - Parameters, 69
  - Select, 66
  - Sort, 64
  - Summarize, 71
- Standard toolbar, 21
- Start up dialog, 41
- Starting Jacana, 40
  - for the first time, 41
- Status bar, 19
- Subset, 10, 107
- Summarize tab, 71
- Summarizing, 71
- Summary values, 71

## ■ T

- Tasks
  - advanced, 101
  - basic, 49
- TCP/IP

- configure, 12
- Templates, 121
  - creating, 121
- Text
  - adding, 61
  - past right boundary, 61
- Tip of the Day, 40
- Toolbars, 20
  - appearance, 25
  - choosing and locating, 25
  - data, 24
  - layout(Page view), 22
  - layout(Record view, 23
  - standard, 21
- Toolbars, buttons and menus, 20
- Tools
  - menu, 37
- Totals, 71
- Trouble-shooting, 123

## ■ U

- Using
  - a ReportWizard, 50
  - fields, 57
  - filters, 101
  - QuickFilters, 102
  - report templates, 121
  - this guide, 2
  - your mouse, 45

- Using Jacana
  - Advanced tasks, 101
  - an introduction, 40
  - Basic tasks, 49

## ■ V

- Version checking, 126
- View menu, 30
- Views
  - user, 104

## ■ W

- What is Jacana?, 8
- What is reporting?, 7
- Window
  - Jacana, 17
  - layout, 18
  - menu, 37
- Windows
  - Microsoft, 1
- Wizard
  - Layout, 49, 89
  - Report, 49
- Workfields, 72
- Working list, 10
- Workstation, 116