

ReportQuest Workbench 11



ReportQuest: Workbench 11

Workbench Compliance and Standards Management Solutions

Workbench Professional and Quality Workbench are the flagship products of Ideagen Software Limited, who have been leading the way in software solutions aimed at Document, Compliance and Standards management since 1993.

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1 Introducing Workbench

Workbench is a collection of software modules designed to assist in the implementation and smooth operation of day to day management control. The overall system consists of the following modules:-

- Audits
- Customer Care
- Document Control
- Nonconformities
- ReportQuest **
- Test and Calibration
- Training

** ReportQuest is different in concept to the other modules; it is a 'plug-in' rather than a 'stand-alone' module. It integrates with any or all other modules and utilises the information stored in them.

Each module (apart from ReportQuest) has been carefully designed to be a powerful individual management aid and for many organisations it may be entirely appropriate to run any on a 'stand-alone' basis. There is, however, considerable integration between the different modules and this could offer many benefits to organisations running a comprehensive quality or other compliance management system. Any company that wishes to adopt a 'phased' implementation can add modules to the system as and when required.

The System Manager and Personnel modules are installed as an integral part of all other modules. The [System Manager](#) handles most of the system's security and it is envisaged that access to this module will be restricted to the system administrator and/or personnel with the highest security clearance. The [Personnel module](#) maintains a centralised database of personnel that can be accessed by every installed module; again it is suggested that access to this module be restricted.

Each module has its own electronic reference manual and on-screen Help system that is context-sensitive; these guides should not, however, be seen as a substitute for professional advice and training. Workbench is designed to be extremely easy to use in its daily operation but the preliminary setting up of a module can be relatively complex. We urge taking appropriate advice in these circumstances wherever possible, particularly where some doubt exists as to the best method of achieving specific business aims with the software.

The Help files assume that you have either Workbench Professional or Quality Workbench with all optional areas licensed. Any areas not licensed, will not be available.

Workbench 11 has several new features; each is explained in detail in the appropriate Help topic.

1.1 Overview of ReportQuest



ReportQuest offers users the opportunity to generate customised reports utilising the full range of information stored in the Workbench database.

To achieve this, lists of data fields are taken from installed modules and offered as a starting point for different types of report. In this way you may choose specific information in order to create tailor-made queries.

One of the many impressive features of ReportQuest is that it can be operated with little technical knowledge because the data structure and links can be hidden from the user. Alternatively, for users with SQL knowledge, advanced features are available for creating more complex reports (see [Security and access](#)).

Reports are built using four different areas - each area containing an easy-to-use, visual environment for the creation and configuration of components within that area. The results of each area then become inputs to the next area: [data](#) feeds into [calculations](#) (if used), calculations feed into components within the [report layout](#), and the report layout is turned into a [preview](#) of the final report. When happy with the content and layout of the report it can then be printed to the printer or to various file formats.

1.1.1 ReportQuest menus



After logging in to Workbench a window will appear, allowing access to all licensed modules.

Click on the ReportQuest button to view its main window. The main menu has only four headings - three of which (File, Module and Help) are common to all modules. The other heading (Run) controls the reports.

File menu

Irrespective of the Workbench modules you have purchased and installed, there are several system options which are always present on the main menu structure. Most File menu items will always be visible, but access to the User Preferences and Workstation Settings dialogs is controlled by the system administrator. Unless the necessary access rights have been granted you will not be able to see these items.

The ReportQuest module is different from other Workbench modules in that once you are actually using ReportQuest (via the **Run** menu) the main Workbench menu structure becomes obsolete.

Run menu

The only menu item here is ReportQuest. This runs the module.

Module menu

The Modules menu gives access to other modules in the Workbench system. Only modules subscribed to by your organisation will be available for use (apart from the Personnel and System Manager modules that are installed as an integral part of other modules).

Help menu

The Help menu items give a complete guide to the very comprehensive on-screen Help system and provide general information on Workbench licences. The Help system in Workbench is context sensitive - clicking a Help button at any time takes you straight to the help you need for the situation you are in.

Help files also assume that you have either Workbench Professional or Quality Workbench with all optional areas licensed. Any areas not licensed will not be available.

1.1.2 ReportQuest main screen

After selecting the ReportQuest module, click on the **Run** menu and then **ReportQuest**. The main **ReportQuest** dialog will open. The front end user-interface of ReportQuest facilitates the organisation of data, queries and reports. It is identical to the Windows Explorer interface. The Report Explorer handles all the report operations and organisation of reports within folders. Report information can also be displayed (Size, Types and Date Last Modified) by using the **View** menu and opting for List or Details.

Reports are created and edited via the main screen using either the File menu or by right clicking - both variants present the same menu options and are as follows:-

- Open - runs the Report
- New Folder - creates a new folder for storing reports
- New Report - creates a new report
- Design - edits a highlighted report
- Print - prints a highlighted report without invoking it
- Delete - sends a highlighted report to the ReportQuest recycle bin - remember to empty this if reports are of a sensitive nature.
- Rename - renames a highlighted report's file name
- Edit Field Attributes - provides access to the Edit Field Attributes dialog.

The main Security for ReportQuest is also accessed and setup from this dialog.

For ease of using ReportQuest, Ideagen have included some of the popular reports from its other modules; you will find these reports situated in a folder named [Sample reports](#).

1.1.3 Security and access

When a folder is created, it is owned by the person who created it - it will then assume the same security as its parent directory. The first directory created will be owned by admin.

If the security of a new sub directory requires amending, select **Access** from the folder's right-click menu - this can only be done by admin. or the owner. The access will default to that of its parent but can be amended at individual or template level. Once access is granted at that level it can be further granted as **Create**, **Update** or **Delete** for each user or template. Admin always assumes the same rights as the directory owner.

Further security aspects

- If a user does not have access to a document in the Document Control module, they cannot view it or its contents in either a query or a report output.
- If a report is run from within another Workbench module then it may be run only, no modifications to the design are allowed.
- Access is further restricted within Workbench and allows the removal of access to certain advanced functions within the **Query Designer**. This higher level of security/access hangs off an area for ReportQuest located in the System Manager module (Access menu) and specifically controls access to the [Code workspace](#), [Edit Field Attributes](#) dialog and [Edit SQL](#).
- See also **Folder Access** (below)

NB. Deleted reports are sent to the Recycle bin. Remember to empty this if you are deleting reports of a sensitive nature.

Folder access

Access to Folders can be restricted by right clicking the relevant folder and selecting Access. Only admin and the owner (ie. the folder creator) may set access. Drag-and-drop action for folders and items takes account of access restrictions, the general rules being that you cannot drag an item out of a folder unless you have Delete rights - and you cannot drop an item into a folder unless you have Create rights. When dragging multiple items, the whole operation will fail if at least one illegal item is included.

1.1.4 Sample reports

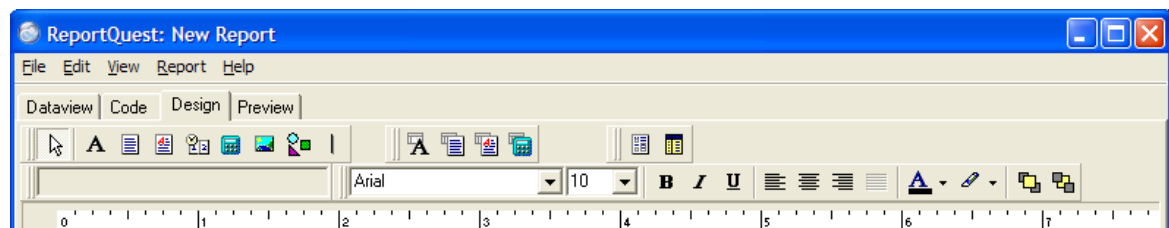
To help use the ReportQuest easily and quickly, Ideagen have included some of the popular reports from its other modules. These have been created and designed in order to provide a starting point to assist in your use of the module, giving you the following advantages:

- no requirement to design your own reports from scratch
- for ease of use, all fields on the Selection Criteria dialog have drop-down lists
- ready to use examples of similar reports & queries that you may wish to emulate
- fine-tune the reports that are already there, ie. remove a field that you do not use
- easily replace the existing Report Title with a title suited to your requirements
- add your company logo.

These reports are situated in a folder named **Sample reports** on the ReportQuest main screen.

1.1.5 Workspaces

[Dataview](#) [Code](#) [Design](#) [Preview](#) are the four workspace environments in which ReportQuest reports are built.



1.1.5.1 Dataview workspace

The **Dataview** workspace is often the key to successful report creation because it allows the selection and manipulation of data needed for a given report. These tasks are accomplished via two visual tools - the [Query Wizard](#) and the [Query Designer](#). These tools simplify the task of data selection by offering you the ability to select, search and order data without requiring an in-depth knowledge of databases. Behind the scenes, however, an SQL statement is generated and used to retrieve the data from the database.

1.1.5.2 Code workspace

Please note before using the Code page: due to the nature of this functionality, Ideagen Software is unable to support errors due to misuse of this operation.

This page is largely intended for advanced users with a detailed knowledge of report engines and/or a procedural programming language. It is to allow for advanced designing of reports. The page displays the bands of the report in a 'tree' view along with the associated variables; you can click on the variables and code the calculation in a syntax-sensitive edit window. When the **Code** page is available, all the variables within each band will be listed.

To populate the **Code** page, a report must have been designed. The highest level of functionality is provided by the 'Event' view that shows all of the report components in a tree view; when a component is selected, its events are displayed. You can then select an event, and code an event handler. Right clicking on the tree view presents a speed menu that shows the different views of calculations available.

A useful example of using this page is supplied with one of the shipped [Sample Reports](#) - 'Document Approval'...

- 1 In the main **ReportQuest Explorer** window select **Sample Reports SP2 | DC | Document approval report**.
- 2 Right-click on the **Document Approval report** and select **Design**.
- 3 Go to the **Code** page. This report uses two data views, therefore there are two tabs at the bottom of the **Code** page to account for this.
- 4 Select the **SubReport** tab.
- 5 Right-click in the top left box (titled Report Bands, Report Objects or Module View depending on which right-click option is selected) and select 'Events'. The box will then be titled Report Objects. Scroll down to the last entry and highlight 'Both Names'. You will then see, below, the code that displays two of the report fields - in this case Forename and Surname have been concatenated to remove the gap between the two.
- 6 Now enter the **Design** page and you will see that this newly created field is named 'Both Names'. The Calculated field can be accessed by right clicking on this field and selecting **Code** from the right-click menu to bring up the **Calculations** editor.
- 7 Close the **Calculations** editor and select the the **Preview** page.
- 8 Click **OK** to preview the **Document Approval report**. You will notice that Surnames follow on from Forenames as coded.

For a related and more detailed example see [Calculated fields](#).

1.1.5.3 Design workspace

After a new report is created and data is set up in the **Dataview** workspace, access the **Design** workspace (Design page) to lay out the report. The Design workspace is divided into two areas - the workbench and the canvas. The workbench is comprised of toolbars, component palettes, rulers and other tools that can be used to manipulate the canvas. The canvas is the area that contains the report layout. This is where the bands and components are placed that ultimately control the content of each page of the report.

[Components](#) [Toolbars](#) [Bands](#) [Speed menus](#)

1.1.5.4 Preview workspace

The **Preview** page plays an integral role in the report-creation process because it allows you to see how the report will look when printed. It is a good idea to access this workspace frequently to see how the report is shaping up. The tools in the page allow you to view each page of a report or zoom in to get a closer look at a specific page. You can also print the report from the preview workspace - see [Previewing the report](#).

It's a good idea to save the report before selecting the **Preview** page, as the report generates upon preview.

1.2 Personnel module



This module is installed as an integral part of all other modules. It is dedicated to maintaining a centralised database of all personnel, accessible to every other installed module. It is responsible for setting up and maintaining the history of all personnel including Workbench users.

It is highly recommended that you establish your personnel records before beginning to use other modules in the system as the records are referred to and used throughout Workbench.

1.3 System Manager module



This module is installed as an integral part of all other modules. It is a vital area of Workbench as it handles much of the system's security by granting or revoking access to menu items for individual users or groups of users (Access Templates). After granting access at menu level you may have a further option to determine what rights the user has in a given dialog (eg. read-only, ability to add new records etc.). Overall this gives you extremely tight control over which users can access which part(s) of the system. The dialog used to control access is designed to make this administration task as easy as possible.

An additional benefit of such tight control is the sheer convenience it offers. Presenting users with precisely the menu options they need to do their work is much clearer and less confusing for them than being faced with a whole list of irrelevant (for them) menu options.

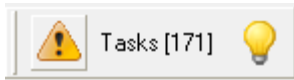
The **Workbench Configuration Centre** is also housed within the System Manager module and presents all Workbench globally configurable options in a single dialog. This means that the administrator can locate the required function quickly and will soon become aware of all elements that are configurable.

The Configuration menu also controls the maintenance of user passwords, the organisation of departments and personnel groups, the prioritising of tasks and the menu option allowing the reassigning of responsibilities, especially useful when a user is leaving the company. Locked out users are also restored here.

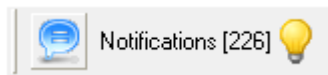
NB. Wherever reference is made (in Help topics) to the 'system administrator' this includes any user who also has access to the relevant options in the System Manager module.

1.4 Tasks, Notifications and the Calendar

On the main toolbar there are three buttons in addition to the buttons showing other installed Workbench modules.



The Tasks button advises personnel that they are being asked to perform a task.



The Notifications button is used to inform personnel that certain events have taken place.



The Calendar button gives direct access to a calendar that records important events and deadlines from all installed modules.

2 Creating a new query

Queries can be designed using a choice of a simple Wizard Interface or a more detailed Design Interface. The **Query Wizard** and **Query Designer** both provide a visual interface, and then generate an SQL query behind the scenes.

In the main **ReportQuest** Explorer window select **File | New | Report** or click on the **New Report** button (third from left) on the toolbar. Access the **Dataview** page and then select **New** from the **File** menu. You will then be presented with the option of using the [Query Wizard](#) or a [Query Designer](#) to create you query.

2.1 AutoJoin

On accessing the **Dataview** page the **File | AutoJoin** menu option enables you to switch the **AutoJoin** facility on or off. This setting affects how tables are joined when a dataview contains multiple tables.

If **AutoJoin** is switched on (the default), the tables are automatically joined as they are selected; otherwise joins must be defined manually - see [Linked dataviews](#).

AutoJoins are defined to suit the most likely scenario but may not be suitable for every purpose. With **AutoJoin** de-selected (Off) the user may change the type of join (inner, outer, operator, etc.) or even make a join to a different table. This can only be done using the [Tables](#) page of the [Query Designer](#).

2.2 Joining tables

Joins enable retrieval of data from two or more tables in a database as though they were a single table. The **Join Table** dialog only appears when the **AutoJoin** facility (**File** menu) is turned off.

ReportQuest supports four types of joins: Inner, Left Outer, Right Outer and Full Outer:-

Inner joins link rows in tables based on a specified join condition, and return only those rows that match the join condition.

Outer joins link rows in tables based on specified join condition and return both rows that match the join condition, and all other rows from one or more tables even if they do not match the join condition.

The most commonly used joins are Inner joins, because they both restrict the data returned, and show a clear relationship between two or more tables. Outer joins, however, are useful for viewing joined rows against a background of rows that do not meet the join condition.

- A left outer join retrieves all rows from the left table in a join, and retrieves matching rows from the right table.
- A right outer join retrieves all rows from the right table in a join, and retrieves matching rows from the left table.
- A full outer join retrieves all rows from both the left and right tables in a join.

NB. The use of Full Outer joins is not recommended. The number of records returned by a Full Outer Join = (number of records in left table) x (number of records in right table). So for example, if you define a full outer join on two tables each containing 1000 records, the resultant recordset will contain 1,000,000 records.

2.3 Query Wizard

The **Query Wizard** presents an end-to-end, easy to use method of creating a query. You will initially be presented with the list of all available tables containing accessible information; one or more tables can be selected from here. The Wizard is a shortened version of the [Query Designer](#) and does not include an equivalent of the [Calcs](#) page.

If the [AutoJoin](#) facility is left switched on, after a table is selected, those tables not available to join to the selected table will automatically be greyed out. An example basic query is shown below.

Creating a basic query

- 1 In the main **ReportQuest Explorer** window select **File | New | Report** or click on the **New Report** icon (third from left) on the toolbar.
- 2 Select the **Dataview** page and select **File | New**; highlight the **Query Wizard** icon and click **OK**.
- 3 Select 'DC: Doc Details' in Available Tables (double-click, or highlight and click on the central > button) so that it moves to Selected Tables and click on **Next >**.
- 4 The next dialog includes all the fields for the selected table. Click on the 'Choose Fields' radio button to view the fields. You will notice that all field names are prefixed with the table name; this is to avoid confusion should more than one table be selected.
- 5 Select 'Doc Details.ID' and 'Doc Details.Title' from the Available Fields (double-click, or highlight and click on the central > button) so that they move to Selected Fields and click on **Next >**.
- 6 You are now at the Search Criteria dialog; this allows the user to limit the report at run time by adding criteria (or 'filters'). For this example the report will not be limited, so go to the next page. (When Search criteria are required, highlight the 'Define Search Criteria' radio button to open the Criteria box and then right-click in this area to reveal the options.)
- 7 You can now set the order you wish to return the information in. Click on the 'Set Order' radio button; you will notice that all fields are available for sorting on, allowing the ability to sort by a field not used in the query. For this example, we wish to sort by serial number, so select Doc Details.ID and click on **Next >**.
- 8 The query is almost complete. In the final dialog the **Name** of the query defaults to the table name; change it if you wish and then select from the three radio buttons. We shall preview the query so highlight the middle radio button and then hit the **Finish** button.
- 9 All the documents that you have in your database should now be displayed and these can be printed out using the Print button at the bottom of the dialog.
- 10 When you **Close** the Preview, you will be taken to the **Dataview** page. From here you can re-enter the query by clicking on any of the top buttons in the **DC_Doc_Details** box but you will be taken to the [Query Designer](#).
- 11 Select the [Design](#) page in order to design the actual report if required.

2.4 Query Designer

The **Query Designer** is used for both the creation and maintenance of queries; it is really an extended version of the [Query Wizard](#), but using pages (see below) rather than an end-to-end wizard approach. The contents of these pages correspond to the pages in the Wizard.

NB. Once a query has been created via the **Query Wizard** it can only be edited via the **Query Designer**.

Creating a new report using the Query Designer

- 1 Click on the **New Report** icon (third from left on the toolbar) or select **File | New | Report**, in the main **ReportQuest Explorer** window.
- 2 Tabbed notebooks are used for designing queries, designing reports and previewing reports. The next step to building a report is to access the **Data** tab (page). At this point you may wish to check whether the [AutoJoin](#) facility is switched on or off.
- 3 With the **Dataview** page selected, select **File | New**. Then select the **Query Designer** icon and click **OK**.
- 4 Complete each of the required pages in turn - see [Tables](#), [Fields](#), [Calcs](#), [Search](#), [Sort](#), [SQL](#) - before clicking the **OK** button.

When you have completed the query and clicked **OK**, a [Dataview preview](#) is displayed. (Some dataview queries can take a long time, depending on the amount of information included in the report. If this is the case, a progress bar will be displayed).

You may now select the [Design](#) page in order to design the actual report.

To re-enter the Query Designer after a query has been created, click on any of the icons at the top of the **Dataview preview** (make sure you have the **Dataview** page open). These icons all correspond to particular pages within the **Query Designer** and default to opening on the selected page; once opened, other pages can be switched to. To see which icon will default to opening on which page, place the mouse over the icon and a yellow pop up will show its name.

2.4.1 Tables

The **Tables** page displays all available tables; one or more table(s) can be selected from here. If the [AutoJoin](#) facility is left switched on, after a table is selected, those tables not available to join to the selected table will automatically be greyed out.

To select a table, double-click on the table name in the Available Tables section; you will see that this action moves the table to the Selected Tables section at the bottom of the screen.

To remove a table, simply double-click on it from within the Selected Tables section.

In a query returning multiple rows, it may be desirable to eliminate duplicate columns. This can be achieved using the *Distinct* checkbox.

Once a table is selected, its relevant information is shown alongside it; this includes the join type, where appropriate.

If you are joining tables manually, ie. with the **AutoJoin** facility turned off, when you select a second table you will automatically be taken to the **Join Table** dialog where you may choose the type of join you require. To amend the type of join at any time, click on the small button showing three dots at the side of **Join Type** and the **Join Table** dialog will appear again, allowing you to make any changes.

See also: [Using more than one table](#)

2.4.2 Fields

The **Fields** page allows you to add or remove any fields from the query. You will notice that all field names are prefixed with the table name; this is to avoid confusion should more than one table be selected. (If the full names of the Field Aliases can't be seen, click in the 'join' in the Field Alias header immediately before the start of the Field SQL Alias header, and widen the field).

To add a field to your query, move the field name to the Selected Fields group by double clicking on it. To remove a field from the Selected Tables, double click on it to move back into the Available Fields section. Fields may be re-ordered by using the arrow keys at the right side of the Selected Fields section.

2.4.3 Edit field attributes

This dialog can only be reached from the main ReportQuest screen (**File | Edit Field Attributes**). It presents the entire contents of the supplied tables.

From this dialog, a user can determine whether the fields are displayed for [selection](#), for [sorting](#) or for [searching](#) by users. This is done per field by use of a simple check box.

If the item is unchecked, then the field will not be available for that purpose by any user.

NB. If changes do not appear to have taken effect, try coming out of ReportQuest and re-entering.

2.4.4 Calcs

On the **Calcs** page you may determine what type of calculation, if any, you wish your query to use. Double-click the field in which you wish the calculation to be performed; this field will then be added to the list of Calculations.

In the bottom box, select a Function type for the calculation, from the drop-down list supplied. This list appears if you click on the current function (shown immediately underneath the Function header).

When you have finished building your query, click the **Dataview Preview** button (first one) on the main [Dataview preview](#) to check that the calculations are as expected.

2.4.5 Search

The **Search** page can be used to add or remove search criteria for your query.

To add search criteria, double-click on the field for which criteria need to be entered from the Available Fields list. You then need to select the Operator (click just underneath the Operator header) from its drop-down list, according to the type of search you require.

Click in the edit box under the Value header and enter the search criteria. This provides a filter for the report and will default to filtering by the record as chosen in the search field.

You can also design the query so that you are prompted to filter the report when you run it - see [Sample Reports](#). If designed this way, at run-time you will be presented with a dialog asking you what you wish to report on - see [Adding Selection criteria at run-time](#) (where AutoSearch, Mandatory and Show All check boxes are also explained).

All of the supplied Sample Reports show search criteria at runtime.

2.4.6 Sort

From the **Sort** page you can set what type of order you wish to return the information in. All fields are available for sorting on, allowing the ability to sort by a field not used in the query.

Double-click on an **Available Field** to sort on; it will be transferred to the Sort fields group below.

The **AutoSort** facility allows you to define up to three levels of sort criteria at run time. Enable or disable this feature at design time using the *AutoSort* check box.

You may also select whether the order should be ascending or descending.

2.4.7 SQL

The **SQL** page (last page to view when using the [Query Designer](#) to generate a report) allows you to view the SQL generated by a query via the Query Designer. You can use this page to make sure that the SQL generated is valid. It allows the name of the **Dataview preview** to be amended and also allows the SQL to be copied to the clipboard.

As there may be times when you need to use the advanced features of SQL that cannot be accessed via the visual interface of the Query Designer, you can manually edit the SQL. It is important to note here that once the SQL has been edited manually, any future modifications must also be made manually.

To edit the SQL manually, right-click over the SQL text; you will then be presented with a warning as described previously. Answer Yes if you wish to proceed.

Access to this page can be controlled individually by the administrator - see [Security and access](#).

2.5 Selecting data

ReportQuest supplies tables that contain all the fields stored in the Workbench database. When you first use ReportQuest you will notice that there are many tables available for selection; which table you need to select to generate the desired data is largely logical according to the table name. For example, the 'DC' table (Document Control) contains all the data relating directly to a document; similarly, the 'AUD' table (Audits) contains all the data relating to audits. (**NB.** All tables generated by either the Personnel module or the System Manager module are pre-fixed with XSYS). The contents of a table can be viewed after a table has been selected - the only fields that are then available for selection are those that are included in that table.

For some reports it may be necessary to join more than one table in order to see the results you require; if so, there are two ways to link these tables - see [Using more than one table](#) and [Advantages of using linked dataviews](#).

2.5.1 Using more than one table

Each table consists of data required for that table only. In order to generate the report you require it may be necessary to select more than one table when you create a Dataview preview - see the example below.

Bringing back the full name of a user who has approved a document

- 1 Using the **Query Designer** click on the **Tables** page and select the 'DC: CRQ Approvers' table and the 'XSYS: Personnel' table.
- 2 Move to the **Fields** page and you will see that the Available Fields box contains all the fields from Doc Approvers and Personnel. (The field name is always pre-fixed with the Table name.)

The CRQ Approvers table contains just the Staff ID and not users' full names (Title, Forename, Surname etc.) but the Personnel table contains all these options. So by selecting both tables you are now able to combine the CRQ approval details and full staff name for output to your report.

NB. The same output could be achieved by creating two Dataview previews, one for CRQ

Approvers and one for Personnel and linking them (see [Linked dataviews](#)). This way, some advantages are achieved.

2.5.2 Linked dataviews

You can create two Dataview previews that have a common field (for example DC: Current Approval.Staffid or XSYS: Personnel.Staffid) and link them. This is done from within the **Dataview** page after the two Dataview previews have been generated and are visible - drag a field from the detail Dataview Preview to its relevant field in the Master Dataview Preview. A link dialog can be accessed via the **Link** option of the right click menu or by double-clicking the visual link that is drawn between the two Dataview previews. Links can also be removed using this dialog.

Dataview linking is useful for breaking up complex dataviews into more manageable chunks. Also there is a separate search dialog for each dataview accessed via a paged notebook when [runtime selection criteria](#) are used; this allows the user to group large numbers of criteria into logical categories. You also gain the advantage of being able to use [Sub reports](#).

See also: [Using more than one table](#)

2.6 Calculated fields

You can use **ReportQuest** to calculate, for example, the total number of documents owned by any owner.

- 1 In the **ReportQuest** main screen, click on the **New Report** button.
- 2 Select the **Dataview** page.
- 3 Ensure the **AutoJoin** feature is enabled by checking **File | AutoJoin**.
- 4 Select **File | New** and double-click on the **Query Designer** icon.
- 5 On the **Tables** page add 'DC: Doc Details' to the Selected Tables list by double-clicking or dragging. Then add 'DC: Owner' in the same way.
- 6 Move on to the **Fields** page and add 'DC: Owner.Forename' and 'DC: Owner.Surname' to the Selected Fields list.
- 7 Now select the **Calcs** page and add 'DC: Doc Details.ID' to the Calculations list.
- 8 Still on the **Calcs** page, click on Sum in the Function column (Calculations box at the bottom of the page) and select Count from the drop-down menu.
- 9 Now select the **Sort** page and add Count(*) to the Sort Fields list - (Count(*) will appear at the bottom of the Available Fields list). Click just under the Desc (z>a) header and then click the checkbox that will appear. This will sort the records in descending order.
- 10 Now hit the **OK** button in order to view the Dataview (DC_Doc_Details).
- 11 Click on the **Dataview preview** button (first button within the DC_Doc_Details window) to view your data.

You now have a useful table containing each owner's name together with the number of documents owned. The data is ordered such that the owner with the most documents appears at the top.

Complete the exercise by designing a report layout for this data - see [Report layout using sample data](#).

2.7 Report layout using sample data

The example report layout shown below uses the data worked with in the topic [Calculated fields](#).

- 1 Click the **Design** page and select **File | New**; then double-click the [Report Wizard](#) icon.
- 2 Select all available fields by clicking the >> button.
- 3 Select the 'Count' field and use the **Order** button to move it to the top of the list.
- 4 Click the **Finish** button and examine the layout.
- 5 Click the **Preview** page and examine the finished report.

This report is useable but could be improved by concatenating the Forename and Surname fields into a single field. See also [Laying out a simple report](#).

- 1 Click on the **Design** page and in the Header band, delete the 'Owner.Surname' label by highlighting and hitting the keyboard **Delete** button.
- 2 Select the 'Owner.Forename' label in the Header band and amend the text to just 'DC. Owner' (in the field on the toolbar). Adjust the size of the label (using black 'handles' - or right-click menu and **AutoSize**, if preferred).
- 3 Delete both the Forename and Surname fields in the Detail band.
- 4 Add a new 'Variable' component to the Detail band by clicking on the Variable button in the [Standard components toolbar](#) (6th button) and then clicking in the Detail band.
- 5 Align the new 'Variable' with the top of the 'Count' field and the left of the 'Owner' label.
- 6 Right-click the new 'Variable' and select **Code**.
- 7 In the **Calculations** dialog, click in the left hand side of the window to reveal 'Value :='.
- 8 Drag the 'Owner.Forename' field from the Data tab and place underneath 'Value :=' in the left window.
- 9 Drag the 'Owner.Surname' field from the Data tab and place underneath 'Owner.Forename'.
- 10 Concatenate the name fields separated by one space by adding '+' to the end of the 'Forename' line.
- 11 Terminate the statement with a semicolon. The complete statement should now look like this...

```
Value :=
    Document [ 'Owner.Forename ' ] + ' ' +
    Document [ 'Owner.Surname ' ] ;
```

- 12 Click **OK**.
- 13 Go to the **Preview** page and examine the finished report. The Surname field now runs on immediately after the Forename field.

NB. Calculated fields will not show up until run time.

2.8 Selection criteria at run time

You can only add the ability to specify run time search criteria via the [Query Designer](#).

Once search criteria have been defined for your query you are then given the option of either the search providing the default filter, or allowing filters to be applied when the report is run. The

provision of this facility is via the check boxes that become available in the Criteria section of the [Search](#) page. Each check box stands for a different run time search facility:

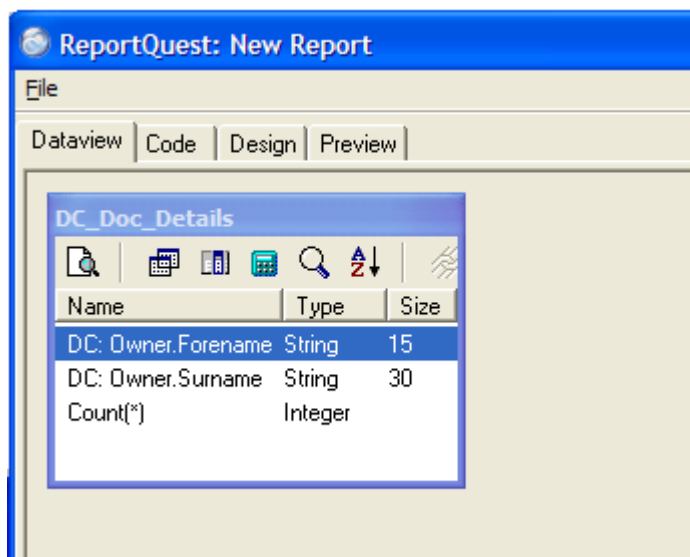
- **AutoSearch** = Allow this criteria to be added at run time
- **Mandatory** = Make the criteria a mandatory input field before the report is allowed to be run
- **Show all** = Default the criteria to display all so that the user only has to select criteria at run time if they wish to.

Once the functionality to add criteria at run time is added, any user will be presented with a selection criteria dialog whenever the report is run or previewed (see [Sample Reports](#) for examples of these dialogs).

2.9 Dataview preview

The Dataview preview appears upon the completion of a query; it allows you to make changes to the existing query. When you complete a query, the Dataview preview is displayed in the left corner of the **Dataview** workspace (page).

Below is an example of a Dataview preview. Place your cursor over the icons at the top of the small preview window for a brief description of the function of each. The first allows you to preview the data; the others take you back to the **Query Designer** at the page corresponding to the icon you have clicked on (ie. Tables, Fields, Calcs, Search or Sort).



3 Designing a report

After a new report is created and data is set up in the **Dataview** workspace, select the **Design** workspace (page) to build a report. This workspace is divided into two areas - the workbench and the canvas.

The workbench is comprised of toolbars, component palettes, rulers and other tools that can be used to manipulate the canvas (see [Toolbars](#)). The canvas is the area that contains the report layout. This is where the bands and components are placed that ultimately control the content of each page of the report.

3.1 Report Wizard

The Report Wizard is a tool in the Design workspace that allows you to create a report by answering some questions pertaining to data, layout, and style. Access this tool from the **Design** page, by selecting **File | New**, then clicking the **Report Wizard** icon.

These reports may be used exactly as they appear or can be customised with the help of toolbars and speed menus exactly as if you were generating a report from scratch.

See [Report layout using sample data](#) for an example of working with this wizard.

3.2 Data pipeline

This is a special kind of component that supplies data to a report and controls which rows of data are used to generate the report. It represents a database table or SQL query and provides data in the form of fields and records.

3.3 Laying out a simple report

For a full description of buttons used in this sample you will need to view the [Standard components toolbar](#) and [Data components toolbar](#).

The progress of the design of the report may be viewed at any time by clicking on the **Preview** page (see [Previewing the report](#)).

Components are deleted using the keyboard **Delete** button.

Laying out a simple report

- 1 Select a **New Report** and click on the **Design** page.
- 2 Select **Report | Title** to add a band at the top of the report to contain the title (see [Bands](#) for further information if required).
- 3 Click on the **Label** button and then move the cursor to the place in the Title band where you want the main title to start.
- 4 The Label1 box will appear in the Title band. 'Label1' will also appear in the [Edit toolbar](#); click in this field and alter the wording here to the title that you want to appear on the report.
- 5 Making sure that the Label is selected, specify the font, size and style using the standard Windows shortcuts in the [Format toolbar](#). If the Label field (in the Title band) is not wide enough to contain the title, right-click (making sure the Label field is selected) and select **AutoSize** if it

is not already selected (ticked). All right-click menu items are described in detail in [Speed menu options](#).

- 6 Next, set up the headings you need, again using the Label button. Place the first Label in the Header band and re-type the required name for the Label in the left field of the Format toolbar. Specify type as required and re-size and/or reposition each Label if necessary (drag and drop). Repeat for further Labels using the [Align or Space toolbar](#) to align (or by selecting **Position** from the right-click menu).
- NB.** Labels placed in the Header band will only appear once (as a heading). If you want 'header' labels to appear with each record, they should be placed in the Detail band.
- 7 Using the **DBText** button (in the [Data components toolbar](#)), create fields in the Detail band to contain the data fields you specified when setting up the Query. Position each in turn and select the required field from the drop-down menu in the Edit toolbar. You need only create one Label for each output field; the system will automatically list and align each record in that field. Their vertical distance apart will be governed by the depth of the band; to enlarge, drag the grey bar at the bottom of the band to the required depth.
- 8 To number the pages, click on the **System Variable** button (5th in the Standard components toolbar); then click in the Footer band and position the 'box'. A drop-down menu will appear in the Edit toolbar offering formats for page numbering and dates - choose an appropriate one.
- 9 Click on the **System Variable** button again and position a date 'box' in the bottom right hand corner of the Footer band. Choose the date format you require (from the drop-down menu in the Edit toolbar).
- 10 Preview your report on the **Preview** page, adjust if necessary and print out to double-check the layout.

This is a simple example which should provide a basis on which you may design your own reports; these may be considerably more complicated but the ReportQuest will cope with the addition of memo fields, shapes and lines. These should be added systematically in the same way as described, with the use of **Regions** (see [Advanced components toolbar](#)) if necessary to prevent fields running over each other.

There is also a [Report Wizard](#) with a selection of six built-in report styles ready to use. These are accessed in **File | New** with the **Design** page selected.

Each selected component has a right-click ([speed](#)) menu; to ensure optimum productivity when using the design facility in ReportQuest it is suggested that you maximise the window and use the speed menus as much as possible.

You can cut, copy and paste one or more components at a time either in the same report or between different reports.

See also [Menus](#) and [Speed menu options for bands](#)

3.4 Label template wizard

The **Label Template Wizard** is a tool in the **Design** workspace that allows you to build templates by selecting printer information and choosing a label type. Access this tool from the **Design** page, by selecting **File | New**, then clicking the **Label Templates** icon.

3.5 Menus

Menu items in the **File** and **Edit** menus function as standard Windows commands, but menu options change when working in design mode rather than query mode.

In **Design** mode, the **View** menu contains the [Toolbars](#) option that allows the adding or removing of all or any toolbar. The **View** menu also contains ruler and grid options allowing you to view or remove rulers (units on the rulers may be changed using **Report | Units**) or to switch 'snap to' grids on or off. **Show Data** offers the option to view or remove data from **Labels** whilst designing.

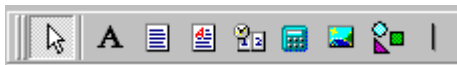
The **Report** menu contains options to add (or remove) **Bands** used in the layout and design of reports. Other menu options allow the specification of how the report should look such as Portrait (upright) or Landscape (wide) and whether the rulers should measure in inches or millimetres etc.

See also: [Groups](#) and [Bands](#)

3.6 Toolbars

The **Design** workspace has several toolbars (see below) that are used in order to create, adjust or modify components. Toolbars are launched (or de-selected) in **View | Toolbars**.

3.6.1 Standard components toolbar



A component is an element used to control how the report looks; each component has a unique purpose. There are three independent toolbars offering components - Standard, Data and Advanced.

The icons on the Standard palette represent components that are frequently used to build reports and each component is described by a yellow tool tip, activated when placing the cursor over the icon. Each component also has a right-click menu, allowing manipulation in many different ways (see [Speed menu options](#)).

To create a component, click on an icon and then click in a band. A brief definition of each standard component's function follows. See [Speed menu options](#) for descriptions of the right-click options for specific components.

Select object tool

This is the first button (left) and selects one or more components within the layout. It can also be used to clear any selection (by clicking in the white space of a band).

Label

is the second button on the standard component palette. It functions as a Header for another kind of component, such as a DBText; select it and then click in the required band, roughly in the position for your Label (Header).

When you specify a Label, the **Select Value** field in the **Edit** toolbar will open and in it you will see 'Label1' (or Label2, Label3 etc. depending on how many labels have been created and which label is currently selected). Place the cursor in this field, delete 'Label1' and type in the actual text required (eg. for a Title this may be 'Number of Nonconformities signed off in May').

Alter the size of the label box if necessary by manually stretching when selected or using the right-click menu (**AutoSize**).

Using the **Format** toolbar (select **View | Toolbars | Format Bar** if this is not displayed) you may specify the font from the drop-down menu, the size and style of type and its alignment (standard Word shortcuts).

Colour may also be added here - to the type (**Font**) or background (**Highlight**).

Finely tune the exact position of the Header by dragging (with the help of the rulers) or [Align or Space toolbar](#) (if this is not displayed use **View | Toolbars | Align or Space** to open). This toolbar allows quick, precise alignment of selected objects.

Memo

is the third button in the Standard component palette. It allows you to load multiple lines of plain text into a memo field; select the **Memo** button and place the pointer in any band, roughly where you want the memo box to appear.

Give the Memo a caption by deleting the word Memo1 (or Memo2 etc.) in the **Select Caption** field (in the **Edit** toolbar) and typing in the required text.

Larger amounts of text or imported text should be added through the right-click menu. To do this, right-click over the Memo component and select **Lines**, then click the **Load** button to bring text into a memo. The text will now be in the designated **Memo** field on your report.

To print a Memo after another text-printing component (DBMemo, RichText, DBRichText), right-click and select ShiftRelativeTo.

RichText

RichText is the fourth button in the Standard component palette - it prints formatted text. Right-click over the component and select **MailMerge** to bring a file into the component.

To print a RichText after another text-printing component (Memo, DBMemo, DBRichText), right-click and select ShiftRelativeTo.

System Variable

displays non-database information concerning numerals such as page number, page count, print date and time, current date and time etc. It is the fifth button on the Standard components toolbar.

To create a date/time field etc., select the **System Variable** button and then place the cursor where you want the field to occur; the **Edit** toolbar will then offer a drop-down menu with various options.

Variable

is the sixth button in the Standard component palette that performs calculations. It works in the same way as the System Variable component.

Image

is the seventh button in the Standard component palette and allows you to load images into your report.

Select the **Image** button and then place roughly in position in the relevant band. Use the black 'handles' on the Image box to reposition and size. Then select **Picture** from the right-click menu to search for and import the required image.

Shape

is the penultimate button in the Standard component palette - it displays various shapes such as squares, rectangles, circles and ellipses.

Select the **Shape** button, place the pointer where you want the shape to appear and click. A square will appear and the **Shape Types** field will open in the **Edit** toolbar, offering a drop-down menu of alternative shapes. Resize the box roughly to the correct size for the shape you wish to draw and then finely tune by dragging, using the rulers or [Align or Space toolbar](#) (if this is not displayed use **View | Toolbars | Align or Space** to open). This toolbar allows quick, precise alignment of selected objects.

Use the **Draw** toolbar to specify type, thickness and colour of line and/or colour of background.

Line

is the final component in the Standard component palette; it allows you to draw a line. Select the button, place the pointer roughly where you want the line to be and click. A 'blind' square will appear with a line drawn across the top; the **Edit** toolbar field will now offer a choice (in the drop-down menu) of Top, Bottom, Left or Right.

When you select any of these options the drawn line will appear on the selected side of the square, ie. if you choose 'Left' from the drop-down menu, the line will stretch from top to bottom on the left hand side of the existing square.

Resize the box to the required line length and use the **Draw** toolbar to specify type, thickness, colour of line.

See also: [Data components](#) and [Advanced components](#)

3.6.2 Data components toolbar



A component is an element used to control how the report looks; each component has a unique purpose. There are three independent toolbars offering components - Standard, Data and Advanced.

The icons on the Data palette offer several components that are identical to ones in the Standard palette, except that they are data-aware. Data-aware components have the ability to read the value of a field from a database table and then display that value in the report. This is different from the standard components which display the content assigned when you lay out a report. You associate a data-aware component with a given database table and field by selecting the data view and field from drop-down lists on the Edit toolbar. Each component also has a right-click menu, allowing manipulation in many different ways (see [Speed menu options](#)).

To create a component, click on an icon and then click in a band. Place your cursor over the icons (on the actual toolbar) for brief definitions of each data component's function.

DBText

displays data from most types of database fields but cannot handle images or RichText. The **DBText** button (first button) allows you to position and specify database text.

Select the button, place the pointer roughly where you want the text to be and click. A small rectangle will appear with 'DBText1' in it (or DBText2, DBText3 etc. depending on how many different text areas you are specifying). At the same time, two fields in the [Edit toolbar](#) will open

offering drop-down menus. The drop-down list on the left contains the dataset from the dataview; the drop-down list on the right contains the fields.

Choose which text you wish to be shown in the currently selected text box and increase the size of the box if necessary using the right-click menu (**AutoSize**) or by stretching.

Choose an appropriate font for the text from the text drop-down menu; then choose its size, style and alignment using the [Format toolbar](#) (standard Word shortcuts). Colour may be added using the [Draw toolbar](#).

Alignment of text boxes with other selected components can be done using the [Align or Space toolbar](#) or by dragging and dropping.

See [Speed menu options](#) for descriptions of the full right-click menu.

DBMemo

is the second button on the Data component palette. It prints plain text from a **Notes** field of a database table and will automatically word-wrap the text.

Select the **DBMemo** button and click in a band roughly in the area where you want the memo box to appear. A rectangle will then appear with 'DBMemo1' in it (or DBMemo2, DBMemo3 etc. depending on how many different memo boxes you are specifying). At the same time the left hand field on the [Format toolbar](#) will open offering a drop-down menu.

Choose the field that contains Notes that you wish to be shown in the currently selected memo box. Alter the size of the memo box if required (by grabbing an appropriate black 'handle' on the box). If you need to enlarge the size of the Header or Detail field that the memo box sits within, grab the bottom bar separating the two fields and drag to the new position.

NB. In order for the memo box to stretch with the amount of copy entered, so avoiding copy sitting on top of other copy, the following two steps should be taken:-

- i) Right-click on the selected Memo box and make sure that **Stretch** is selected.
- ii) Right-click on the band in which the DBMemo box is to be placed and select **DynamicHeight**.

To print a DBMemo after another text-printing component (Memo, RichText, DBRichText), right-click and select **ShiftRelativeTo**.

DBRichText

The **DBRichText** is the third button on the Data component palette. It prints formatted text from a memo field and will automatically word-wrap the text. To print a DBRichText after another text-printing component (Memo, DBMemo, RichText), right-click and select **ShiftRelativeTo**.

DBCalc

is the last button on the Data component palette; it performs simple database calculations (Sum, Min, Max, Average, Count).

Select the button, place the pointer roughly where you want the calculator box to be and click.

The [Format toolbar](#) will then give a drop-down menu; choose the field you wish to appear in the calculator box and adjust the size of the box if necessary (or choose **AutoSize** from the right-click menu). For example, if you wish to total a list of costs, add a DBCalc box at the end of a table, select **Calculations** from the right-click menu and select Sum from the drop-down menu.

Further right-click options are described in [Speed menu options](#).

See also: [Standard components](#) and [Advanced components](#)

3.6.3 Advanced components toolbar



A component is an element used to control how the report looks; each component has a unique purpose. There are three independent toolbars offering components - Standard, Data, Advanced.

The Advanced component palette contains components that can help you tackle complex reporting requirements. Each component also has a right-click menu, allowing manipulation in many different ways (see [Speed menu options](#)).

To create a component, click on an icon and then click in a band.

Region

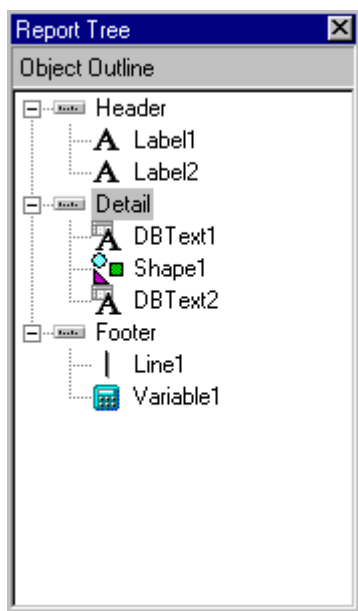
is a component on the Advanced component palette that can contain other components. It allows you to group the elements of a dynamic layout into logical units.

Using Regions you may group labels, text and shapes that belong to each stretching component. Regions allow you to tell the system that certain static components should be shifted or stretched relative to a specific stretchable component. Regions also have the printing capabilities of a shape - you can print a border around a region or print a region in a specific colour.

SubReport

is a component on the Advanced component palette that allows you to create a report within a report in order to show more levels of detail or to print several reports as one. It is used to handle multiple master details, create side-by-side reporting effects and hook reports together as one. If you need a report to print within the context of a band, use a Child type sub report (right-click menu). If you need to hook reports together, use a Section type [sub report](#).

3.6.4 Report tree

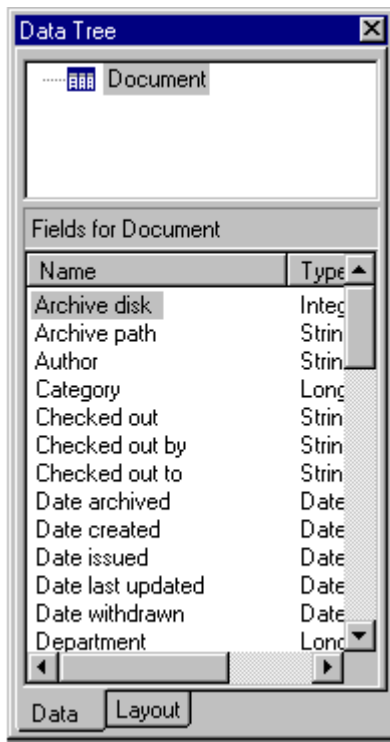


The Report Tree (**View | Toolbars | Report Tree** in the **Design** workspace) can be used to view the components within each band. Components selected in the Report Tree become the selection in the report layout. You can select multiple components by holding down the keyboard **Ctrl** key

and clicking on each name; rename components by right-clicking over the name, selecting **Rename**, and then typing in a new name. Make sure to hit the **Enter** key after renaming to ensure that the new name is assigned.

This tool window is dockable only on the left and right sides of the **Design** workspace.

3.6.5 Data tree



The Data Tree (**View | Toolbars | Data Tree** in the **Design** workspace) can be used to create data-aware components within a band. Simply select a set of fields and drag the selection into the band. A set of corresponding data-aware components will be created.

This tool window is dockable only on the left and right sides of the design workspace.

3.6.6 Standard toolbar

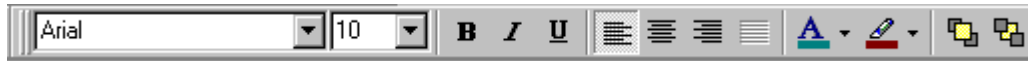
The Standard toolbar allows you to perform basic functions such as opening, saving, and printing reports, as well as cutting and pasting selections.



Place your cursor over each button (on the actual toolbar) for brief tool tip definitions of the function of each.

3.6.7 Format toolbar

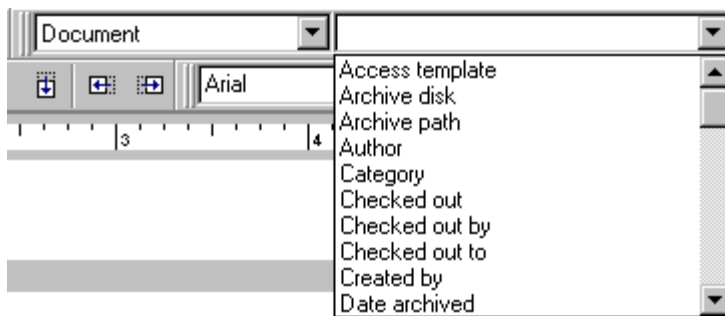
This is a standard Windows toolbar that sets the font, sizes, style, alignment and colours of text-based components. It also sets the layering of all components.



3.6.8 Edit toolbar

This toolbar changes according to the component that is selected.

Edit toolbar with a data-aware component...



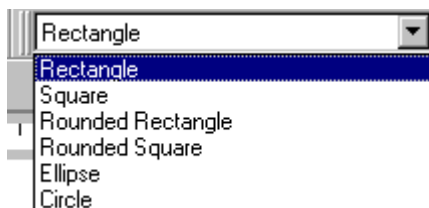
The configuration above allows data pipeline and fields for the component to be set. The drop-down list on the left shows data pipelines. The drop-down list on the right shows field names.

Edit toolbar with a label component...



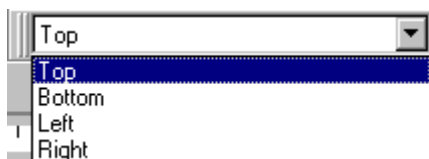
This configuration allows you to type the text for a label.

Edit toolbar with a shape component...



The Edit toolbar allows you to choose from several shapes when a shape component is selected.

Edit toolbar with a line component...



This configuration allows you to move the line to the top, bottom, left, or right within a line component.

3.6.9 Draw toolbar

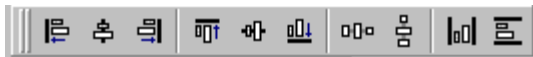
This toolbar is used to set the colour and style for the shape, line, and region components.



Place your cursor over each button (on the actual toolbar) for brief tool tip definitions of the function of each.

3.6.10 Align or Space toolbar

This toolbar is useful when components need to be positioned uniformly. For example, it can align several components so that the tops are all even, or it can space components so that they have an equal amount of space between them. The first component selected determines the position to which the others will align.



Place your cursor over each button (on the actual toolbar) for brief tool tip definitions of the function of each.

3.6.11 Size toolbar

Use the Size toolbar to set all of the components in a selection to a uniform height or width.



Place your cursor over each button (on the actual toolbar) for brief tool tip definitions of the function of each.

3.6.12 Nudge toolbar

This toolbar is useful when you want to move a component or selection of components with extreme precision. Each icon represents the direction the selection will move. Selections will move one pixel each time you press an arrow key.



Place your cursor over each button (on the actual toolbar) for brief tool tip definitions of the function of each.

3.7 Groups

When designing a report, but not whilst building the query, you can create, edit and delete groups using **Report | Groups**. This menu option, accessible from the **Report** menu when the **Design** page is selected, allows you to break your report into several sections.

As the report compiles, it tracks the value of the field or component upon which the group is based and each time this value changes, a group break occurs.

When a group is selected, group headers and footers are automatically created. These allow you to print headings or introductory information before a group starts and/or summary information after a group ends.

Working with Groups

- 1 With the **Design** page selected (and at least one Label added to the report), choose **Groups** from the **Report** menu.
- 2 Create a group by selecting from the drop-down menu and clicking **Add**.
- 3 The **Break On** option determines what type of component the group can be based on - select **Data Field** to base the group on any data field in the report; select **Custom Field** to base the group on any textual component eg. Label, Variable etc.
- 4 In **On Group Change** select the report formatting required for when the Group changes.
- 5 Click **OK**.

3.8 Bands

A band is a section of the **Design** workspace that describes how parts of the report will look. Bands are labelled in the section divider immediately below them; thus, the first band is called the 'Header', the second is called the 'Detail', and the third is called the 'Footer.' The Header, Detail, and Footer bands automatically appear in this order as part of the layout of a newly-created report.

To alter the size of a band, click on the band's name (horizontal grey bar) and drag down or up to the size required. **NB.** You cannot drag a band above the bottom of the lowest report component in the band. If you need to make the band smaller, move the component first.

Header

The Header band prints at the top of each page. The system defaults to this band being included in standard reports but you may remove it from the layout by de-selecting **Report | Header**.

Detail

The Detail band prints once for every row of data. It cannot be removed.

Footer

The Footer band prints its components (usually System Variables such as page numbering and/or dates) on the bottom of each page. The system defaults to this band being included in standard reports but you may remove it from the layout by de-selecting **Report | Footer**.

Title

Select **Report | Title** to add a Title band. It contains the title of the report that, by default, is printed only on the first page of a report, above all other bands. The right-click menu allows you to print the title on a separate page (see [Speed menu options for bands](#)).

Summary

Select **Report | Summary** to create this band. It prints once at the end of a report and is typically

used to summarize data. The right-click menu allows you to print a summary on a separate page (see [Speed menu options for bands](#)).

Group bands

A group is a section of a report that contains a Group Header, Detail, and Group Footer band. Groups are assigned to a database field. Select **Report | Groups** to access the **Groups** dialog. If you want the groups to print on separate pages, tick the *Keep group together* check box in the **Groups** dialog.

Group Header

The Group Header band contains the header for a group. Components in a group header band appear at the beginning of a group. Select **Report | Groups** to create a Group Header and Footer band. Use a Group Header band (generated automatically when a Group is selected) to display group totals or use special formatting such as lines and shapes in order to separate group breaks.

Group Footer

The Group Footer band contains the footer for a group. Components in this band print at the end of each group; therefore, if there are several groups per page, the contents of this band will print several times. Select **Report | Groups** to create a Group Footer and Header band.

You may use a Group Footer band (generated automatically when a **Group** is selected) to display group totals or special formatting, such as lines and shapes, for separating group breaks.

3.9 Speed menu options

All components (Label, Text box, Shape, Line etc.) have a right-click menu that allows you to manipulate the component in appropriate ways. The component must be selected before the right-click menu is available. Not all options are available for each component; a description is given below of the most frequently used options. Bands also have right-click menu options - see [Speed menu options for bands](#).

A specific menu option is currently being used if it has a tick beside it. When you de-select a menu option the selected component will not automatically revert to its former state; this must be done manually by dragging etc.

AutoSize is a speed menu option available for text components. When AutoSize is set to true (ie. has a tick beside it), the component automatically adjusts its width so that all text is displayed.

BlankWhenZero allows you to print a blank instead of a 0 when the value of a field (as determined by the Report Field) is equal to zero. The default is 0.

Bring to Front - places the selected object in front of all other objects within the same band. The two buttons at the right of the [Format toolbar](#) allow you to arrange selected objects without having to go into the **Edit** menu or to right-click.

Calculations allows you to choose the type of calculation you require from the Calc Type drop-down menu - Average, Sum, Minimum etc.

Also, when groups have been specified (see **Report | Groups**), calculations such as group totals are also available using the 'Reset Group' option; select the relevant group from the drop-down menu. Each time the field value for the Reset Group changes (breaks), all associated DBCalc components are reset to zero.

Center is used to centre an image within the Image box.

Code takes you directly to the **Code** page.

DirectDraw indicates whether the image will be sent directly to the printer or to an intermediate bitmap and then copied to the printer. If you are having difficulty getting an image to print correctly on the printer, try selecting this option.

DisplayFormat is used to control how data is formatted for a report, for example, '#,0' would display 10000 as 10,000.

If the data field is a date or time type, then you can use the standard formatting characters for those types ('dd/MM/yyyy', 'hh:mm:ss'). Depending on the component selected, you may choose a specific format from those shown in the **Display Format** window. **NB.** When setting the **Display Format** for date and time fields, the formats available are determined by the Windows settings on the current machine.

Double is only available when drawing lines; if selected, the drawn line will be a double one.

Edit is an option for a RichText component that opens the **Rich Text Editor** dialog which in turn allows you to open a file and format text.

KeepTogether controls pagination when the contents of a Memo/ Region/ SubReport/ Group etc. cannot fit on the current page. Normally the contents are printed to the bottom of the available page space and then continued on subsequent pages until complete. If KeepTogether is ticked, the Memo/ Group etc will advance to the next page when the contents do not fit.

Lines This Memo speed menu option allows you to access the **Memo Editor**, from which you can open text-only files. Using this you may enter new or existing text into a Memo field and edit existing text.

LookAhead allows you to display summary calculations in the title band, page footer calculations in the Page Header band, group footer calculations in the Group Header band and column footer calculations in the Column Header.

When the LookAhead property is selected (ticked), the system will continue to update with the most recent calculation value until the report completes the generation of the associated page, group or column. **NB.** The **Report | Pass Setting** option must be set to two Pass, in order for LookAhead calculations to function reliably.

You can determine at what stage the summary calculations are performed by using the **Timing** option.

MailMerge appears when you right-click over a RichText component. It allows you to import field values into the RichText component.

MaintainAspectRatio scales an image so that the height and width are adjusted based on the original size.

ParentHeight forces the height of the selected component to match the height of the parent component. The parent may be either a Band or a Region.

ParentWidth forces the width of the component to match the width of the parent component. The parent may be either a Band or a Region.

Picture allows you to import images from other files within the system.

Position - the 'sub-options' in the right-click menu for this option vary, depending on whether it is used in conjunction with a band, region or component. Broadly speaking it allows you to position and/or size a selected band, region or component using exact measurements in report units (ie. inches, mm., etc.)

To alter a measurement, either type in the new one or adjust the existing one using the up and down arrows.

- Left - the distance from the left hand edge of the report to the selected component.
- Top - the distance from the top of the report to the selected component.
- Width - the width of the selected component.

- **Height** - the actual height (depth) of the selected band or object.

ReprintOnOverflow is a speed menu option that applies to static components, or components that always print at the same height. These types of components are frequently used with stretchable components because they serve the purpose of a heading. If a memo prints onto several pages, the heading component should print with it. Set the heading component to **ReprintOnOverflow** so it will print on each page.

ReprintOnSubsequent is used in conjunction with **SuppressRepeatedValues**. When **SuppressRepeatedValues** is selected and details have overflowed onto a new page, you can force the data field to reprint on the first detail line of the new page by selecting **ReprintOnSubsequent**.

Reset Group is used to specify a control group for a report calculation. Each time the data value of the field specified in the 'Break on' field changes (see **Report | Groups**), the calculated value of **DBCalc** is reset to zero, and the calculation begins again.

NB. For **DBText** components, the **ResetGroup** property can be used to control the behavior of the **SuppressRepeatedValues** property. Normally the **DBText** component tracks the text value of a field, suppressing any repeated values; it does this without any regard to group breaks which may have occurred. By associating a **DBText** component with group, you can force a **DBText** component to reprint when the group breaks.

Send to Back - sends the selected object to the back of all other objects within the same band.

ShiftRelativeTo is a speed menu option only available to components that are dynamically sized, ie. memo, **DBMemo**, **RichText**, **DBRichText** and **Region**. When multiple stretching components occupy the same band, this option allows the association of components with one another so that one can print directly after another. To make this association, right-click over a component, select **ShiftRelativeTo**, and choose the component you want to print first from the drop-down list.

If you have a static component, such as a **Label**, which needs to shift relative to a given stretching component, then place the component in a **Region** and set the **Region's ShiftRelativeTo** to the stretching component.

NB. When stretching components are placed within a **Region**, the **ShiftRelativeTo** property is disabled.

You may notice that all stretching components in a band do not always appear in the **ShiftRelativeTo** dialog when you are assigning this property. This ensures that components which are shifting relative to one another are not involved in a circular action. In other words, if **Memo1** is shifting relative to **Memo2**, then **Memo2** cannot shift relative to **Memo1** as this would create a situation which the system could not resolve.

For working examples of **ShiftRelativeTo**, see [Working with dynamic components](#).

ShiftWithParent - with this option checked, an object retains its position relative to the parent when the parent is altered; ie. if the parent field of the object is extended using its top band, the object will retain its distance from the top band, no matter how large (or small) the field becomes. See [Working with dynamic components](#).

Single is only available when drawing lines; if selected, the drawn line will be a single one.

Stretch applies to stretchable components only (ie. Memo fields and **Regions**). When **Stretch** is not selected, the component behaves just like a static component - it prints the same height each time, regardless of text. When **Stretch** is selected, the component adjusts according to the amount of printing text.

NB. If a Memo field is set to **Stretch** it cannot stretch beyond the height of its parent band; in order to see the Memo field fully, the parent band must be set to **DynamicHeight** (from its right-click menu).

StretchWithParent - determines whether the Height of the component stretches to match any stretching done by the Band. All stretching occurs vertically and only vertical lines will stretch. Band stretching may occur whenever a Memo or **DBMemo** component has the **Stretch** property selected and the parent Band is set to **DynamicHeight**. See [Working with dynamic components](#).

SuppressRepeatedValues - When the value of a field (as determined by the Report Field) is the same across several records, SuppressRepeatedValues allows you to print the report control only once each time the field value changes. This is useful in reports where a highly redundant field is included in the detail band (for example, the City field in a report containing addresses).

Timing - see **LookAhead**.

Transparent determines whether the background of a report component is clear or opaque.

Visible determines whether a component is shown on screen; if selected, although the object will still be visible when designing the report, it will not be visible on the Preview tab or when printed.

WordWrap determines whether the text of a report has line breaks on word boundaries so that the text fits inside the control instead of being truncated. The system defaults to this option not being selected.

3.10 Speed menu options for bands

Right-click menu options exist for the actual Title, Header, Detail, Footer and Summary bands. These are:-

DynamicHeight - when selected, the height of the relevant band will increase to accommodate its component. The default is 'off' (or **StaticHeight**).

NewPage is only available when using Title or Summary bands. Use this property when you want to print the contents of the Title and/or Summary band on a separate page.

Position - the 'sub-options' in the right-click menu for this option vary, depending on whether it is used in conjunction with a band, region or component. Broadly speaking it allows you to position and/or size a selected band, region or component using exact measurements in report units (ie. inches, mm., etc.)

To alter a measurement, either type in the new one or adjust the existing one using the up and down arrows.

- **Height** - the actual height (depth) of the selected band or object.
- **Bottom Offset** - when used in conjunction with a band, defines the vertical space appearing after the band. When used in conjunction with a component, defines the vertical space appearing after the component has printed. When used with stretching components, acts as a margin between the stretching component and the components that are shifting or stretching in relation to it (see [Working with dynamic components](#)).
- **Print Position** - allows you to specify an exact vertical position on a page where a selected band should be printed. If the print position of the report is beyond the print position of the band, then the report advances to the next page and attempts to print the band again.
- **Print Count** - limits the number of times the Detail band prints on each page.
- **Bands per record** - defaults to 1. Use this to control the number of times the Detail band prints for each record in the dataset.

PrintOnFirstPage determines whether the Header and/or Footer is printed on the first page of the report. The default is 'on'.

PrintOnLastPage determines whether the Header and/or Footer is printed on the last page of the report. The default is 'on'.

StaticHeight - when selected, the height of the relevant band will be static, ie. it will not increase to accommodate its components. This is the default.

Visible - the program defaults to all information being visible when printed; you may choose whether to make any field invisible when printed by de-selecting the Visible option.

3.11 Working with dynamic components

ReportQuest allows you to create highly dynamic report layouts. Various components have the ability to stretch to accommodate the data to which they have been assigned and there are many in-built properties designed to make your reports look good. A detailed description of the main properties follows:-

ShiftWithParent Components can have either a Band or a Region as a parent. When a component has a ShiftWithParent property set to True (selected), it will adjust its vertical position based on the change in height of the parent; this is useful when you want static components to appear below stretching components.

For example, you may have a stretching memo in a band and some labels and text which should appear below the memo. Place the labels and text below the memo in the band and select the ShiftWithParent property. When you run the report, the memo stretches; and when the memo completes stretching, the static components will be printed below it.

StretchWithParent This property can be used to add formatting to a dynamic layout and is available with Line, Shape and Region components. When selected, StretchWithParent will adjust the height of the component based on the change in height of its parent.

For example, to place a border around a memo, simply drop a shape component over the memo, select StretchWithParent and send the shape to the back. When you run the report, the shape will stretch based on the size of the memo.

Regions allow you to group the elements of a dynamic layout into logical units. Using Regions you may group labels, text and shapes that belong to each stretching component. Regions allow you to tell the system that certain static components should be shifted or stretched relative to a specific stretchable component. Regions also have the printing capabilities of a shape - you can print a border around a region or print a region in a specific colour.

ShiftRelativeTo is used when you have multiple stretching components that need to be positioned based on one another. This property is available for stretching components only and is used to specify the relationship between the stretching components in a band or between regions within a band.

The ShiftRelativeTo dialog allows you to select the component that should be printed before the selected component. For example, say there are three memos in a band, each of which needs to stretch - Memo1 prints first, then Memo2, then Memo3. In order to set up this relationship, access the ShiftRelativeTo dialog for Memo2 and select Memo1.

Then access the ShiftRelativeTo dialog for Memo3 and select Memo2. The dynamic layout you have now created will have multiple stretching components. If each of the memos have components that should be displayed with them, place the memo and its components in a Region and use the ShiftRelativeTo property of the Region instead of the Memo; this means that the components will move too.

Bottom Offset When you have multiple stretching components, you need a way to specify some 'dead space' to appear between each stretching component. The Bottom Offset property is used for this purpose.

For example, Memo2 (from the example above) has to appear 0.5 inch below the position where Memo1 completes printing... Select Memo1 and from its right-click menu select Position; from the Position dialog set the Memo1 Bottom Offset property to 0.5 (assuming the report units are set to inches). 0.5 inches of space will now appear between Memo1 and Memo2.

3.12 Working with sub reports

Where more than one Dataview preview is used for a query, it is possible to create sub reports. At its basic level, a sub report is one report inside the body of another that work together to make one report.

For an example of using a sub report, right-click on the **Document Approval report** (see **Sample**

Reports) and select **Design** from the right-click menu. On the **Design** page you will see two tabs at the bottom of the form; the second tab, labeled 'SubReport1:<xx>' is the sub report.

Compare the contents of the 'Main' report with the contents of the first Dataview preview (from the **Dataview** page) and you will notice that the Main report consists of the information from that dataview. The sub report takes its information from the second Dataview preview (in this case 'Doc_Approvers linked to document').

Using a sub report

- 1 Create the main report (that will generate more than one dataview) in the normal way.
- 2 Click on the **Design** page.
- 3 To add a sub report to this, click on the **SubReport** icon on the toolbar (see [Advanced components toolbar](#)) and then click in the band where you wish the sub report to be.
- 4 You will then see a box with the text 'No Data Pipeline Assigned' to indicate that there is no data attached to the sub report. To attach data, simply click on the second tab at the bottom of the dialog and create the report.

NB. You will notice that a new field 'Data Pipeline Name' appears on the **Design** page toolbar. This offers a drop-down list of the names of the dataviews as shown on the **Dataview** page. It is important that you select the correct name in order for the sub report to be created correctly.

See also: [Speed menu options for sub reports](#)

3.12.1 Sub reports

This component provides three different capabilities based on the value of the PrintBehavior property. The designer may set the value of this property at design time by right-clicking the sub report and selecting **Child**, **Fixed** or **Section**.

Child The width of the SubReport component is used as the page width and the page height of the parent report is used (as specified in the parent report's PrinterSetup property). The report begins printing at the first available location on the page and then 'stretches' across as many pages as are necessary to complete the report.

Sub reports set to Child behave like stretching memos and are well-suited for most 'multiple detail band' requirements. Because child reports use the width of the SubReport component as the page width, they are also useful for some side-by-side reporting effects. **NB.** When creating child type sub reports, you must set the parent band **PrintHeight to Dynamic** (right-click menu); otherwise, the report will not print.

Fixed The dimensions of the SubReport component are used as the page size of the report. The report generates a single page fitted to these dimensions. This setting is most often used when a report of fixed size, such as a table, needs to be printed at a pre-defined location on the page.

Section The Sub report uses its own PrinterSetup property to determine the page dimensions. When the report completes printing, the last page is completed and control is returned to the parent report at the beginning of the next page. When several independent reports need to be 'chained' together, Section SubReports are generally the best choice. (**NB.** In order to link several reports together, place each subsequent SubReport in the SummaryBand of the preceding report.)

Section type sub reports also have the capacity to change the printer settings for the portion of the report in which they generate. Use the SubReport's **PrinterSetup** property to specify the different settings, just as you would a normal report. If you specify a different printer in PrinterSetup than that of the parent report, then a **NewPrintJob** will be started on that printer when the report generates. This means that different sections of a report can use different printer settings and they can also be sent to different printers.

In order to keep Section type sub reports from taking up any space in the parent report, place the SubReport in a band by itself and set the band's **PrintHeight** property to **Dynamic** (use right-click menu).

3.12.2 Speed menu options for sub reports

Many speed menu options used in conjunction with sub reports are common to other components and their functions are described in [Speed menu options](#). Options that are applicable only when using sub reports are described below:-

For **Child**, **Fixed** and **Section** see [Sub reports](#).

DrillDown applies to sub reports which have the PrintBehavior set to Child. When assigned, this property indicates the 'hot' component which when clicked, causes the current page in the Print Preview form to be regenerated with the sub report expanded. This creates the effect of a 'drill-down' sub report.

ExpandAll applies to sub reports which have the PrintBehavior set to Child and the DrillDown component assigned. When selected, all instances of sub report print are expanded. The drill-down component is no longer 'hot' in the print preview window.

NewPrintJob - When the PrintBehavior property is set to Section, then NewPrintJob determines whether a new print job is started when the sub report is sent to the printer. It can be used when a portion of a report needs to be printed to a separate printer. If you need to change printer settings for a certain section, you can do so without starting a new print job; simply set the value of the appropriate PrinterSetup properties (Orientation, PaperName, BinName, etc.) and these settings will be applied as the report prints.

ParentPrinterSetup determines whether the values for the PrinterSetup property should be copied from the parent report. If ParentPrinterSetup is not selected, then one or more of the PrinterSetup properties differ from the parent report.

ParentWidth when selected, forces the height of the component to match the width of the parent component. The parent may be either a band or a region.

ResetPageNo enables subset page numbering. In subset page numbers, the page numbers and page count of the sub report are displayed instead of the master report page numbers.

ResetPageNo is only available in Section style sub reports.

TraverseAllData applies to sub reports that have the PrintBehavior set to Fixed. When selected, this property indicates that the sub report will continue to print (print on additional pages in the same exact position) until all data is traversed. By default, the Fixed type sub report truncates the data (ie. prints once per band, but does not overflow if all data can't fit in the space of the subreport).

4 Previewing the report

When you have finished designing the report (or at any stage during the design) click on the **Preview** page to see how it will look. At this stage any amendments can be made before printing. If you hold the pointer tool at the bottom of the tool bar, yellow pop-up bars will appear, explaining the feature of each button.



The Print icon allows you to print any material shown in the print preview.



By clicking on the middle of the three magnification buttons, the page will be shown full width. By clicking on the right of the three magnification buttons, the page will be shown at actual size. The left magnification button shows the whole page.



The outside arrows take you back to the first page or on to the last. The single arrows allow you to turn the pages of a report backward or forward. The number of the current page is shown in the centre.

Remember that most components of the report can be made invisible if required (see [Speed menu options | Visible](#)) and that the printed report will not always appear exactly as the preview. It is therefore advisable to print the report after previewing, to check that all components appear in print form as you expect them to.

If the preview appears to be 'clipping' the last letters of some labels, try de-selecting **AutoSize** from its right-click menu; then stretch the box a little to put some white space after the end of the word.

NB. Regardless of how it looks on-screen, the full word will print.

To return to the design of the report, click on the **Design** page.

5 Saving a report

When you are happy with the report you may print and/or save it in exactly the same way as a normal file using the **Save** or **Save As** option in the **File** menu. It will then appear on the front end user-interface that is identical to the Windows Explorer interface (see [ReportQuest main screen](#)) in the chosen folder.

You may also save the report as a template (see [Saving the report as a template](#)) or as a text file (see [Saving the report as a text file](#)).

5.1 Saving the report as a template

As well as being able to generate, save and print specific reports ReportQuest allows you to save report templates. These can ensure consistency, save time and generally offer a huge benefit when different companies or departments demand reports laid out to a particular specification.

Report Templates are saved as .RTM files. They contain only report formatting and are not required for the correct functioning of reports, even when a report is based on such a file, ie. the template could be deleted but a report based on it will still run. The management of these files is left to the user, but they can be loaded to and from anywhere.

Creating a report template

- 1 Generate your query.
- 2 Lay out the report but do not import any information from the database - simply position and size the required components.

Select the font and size of type within Label and Memo fields, add lines, shapes and specify the relationship of components within bands. You may also add date and page fields in the Footer band if required.

NB. If you wish to layout the whole report, including database components, the system will allow you to do this and still save the report as a template (.RTM file). However, when using the template in the future, the imported data will obviously have to be changed because data fields and/or the data tables you are using may be different.
- 3 Preview the layout of your report.
- 4 Select **Save To File** from the **File** menu; the **Save As** dialog will appear.
- 5 Give the file a **Name** (with the .rtm suffix).
- 6 Specify where the file should be saved.
- 7 Click **OK**.
- 8 The report template will now be saved and can be loaded (using **File | Load From File**) at any time in the future.

See also: [Saving the report as a text file](#)

5.2 Saving the report as a text file

Reports may be saved as text files, so allowing input into specialised applications such as Excel spreadsheets.

Saving the report as a text file

- 1 Generate your query.
- 2 Design the report and check by previewing (or printing) that it is as you wish.
- 3 Select **Print to File Setup** from the **File** menu.
- 4 In the **Print to File Setup** dialog, select the **File Name** using the **File** button.
- 5 Select the **File Type** you wish to save the file as.
- 6 Highlight each **Band** in turn. The Available Controls field will alter to show components in each of the bands as they are selected.
- 7 Select the controls (in Available Controls) you wish to add to the file and move them to the Selected Controls field using the central > button. To remove Selected Controls, use the central < button to move them back to Available Controls.

NB. Export of Memo fields to character separated (.CSV) files is not supported, therefore DBMemo objects will not appear in the Available Controls field for selection.
- 8 Click **OK** when you have set up the dialog as required and the report will print to the chosen directory in the specified format.

You may still save the report/query in other formats (ie, as a [template](#) or a [simple report query](#)) and to various file formats - see [Printing to File](#).

5.3 Printing to file

ReportQuest's architecture allows you to render reports in different file formats. Based on the capability of the destination format, the report's layout is retained.

Element	Lotus	Quattro	Excel	HTML	RTF	Graphic	PDF	CSS2
Text	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Images				Yes	Yes	Yes	Yes	Yes
Shapes				Yes	Yes	Yes	Yes	Yes
Fonts			Yes	Yes	Yes	Yes	Yes	Yes
Lines				Yes	Yes	Yes	Yes	Yes
Barcode				Yes	Yes	Yes	Yes	Yes
Checkbox				Yes	Yes	Yes	Yes	Yes
Bold			Yes	Yes	Yes	Yes	Yes	Yes
Italic			Yes	Yes	Yes	Yes	Yes	Yes
Underline			Yes	Yes	Yes	Yes	Yes	Yes
Alignment			Yes	Yes	Yes	Yes	Yes	Yes
Font Color			Yes	Yes	Yes	Yes	Yes	Yes
RichText	Plain	Plain	Plain	Yes	Yes	Yes	Plain	Yes

Some Frequently Asked Questions

Why are my memo fields truncated in the spreadsheet devices?

Since spreadsheet text items are limited to 255 characters, when printing to file, all items over 255 are truncated.

Why are my layered items garbled in my device output?

Printing to file tries to render your report as accurately as possible given the capabilities of the output device. Certain elements like layering (one report object on top of another) cannot be accurately reproduced.

Where are my lines/images in RTF?

In Word, to view lines and images you must turn on preview mode under view.

When I print to HTML/CSS2 devices the TextFileName is not used

HTML & CSS2 devices create a single file for each page printed since these file formats do not allow 'page breaks' like other formats. By default, printing to file will use the path from the TextFileName property and create a sequence of files called rptxxx.htm where xxx will be a sequential number.

6 Sample Reports

To help use the ReportQuest easily and quickly, Ideagen have included some of the popular reports from its other modules. These have been created and designed in order to provide a starting point to assist in your use of the module, giving you the following advantages:

- no requirement to design your own reports from scratch
- for ease of use, all fields on the Selection Criteria dialog have drop-down lists
- ready to use examples of similar reports & queries that you may wish to emulate
- fine-tune the reports that are already there, ie. remove a field that you do not use
- easily replace the existing Report Title with a title suited to your requirements
- add your company logo.

These reports are situated in a folder named **Sample reports** on the ReportQuest main screen.

7 Workbench menus at a glance

This section explains, very briefly, the purpose and scope of each Workbench menu item in the ReportQuest module.

File

Where Am I? Allows you to verify the currently selected database. This is also displayed at the lower right side of the Workbench main window.

Who Am I? Shows your current Login ID and whether access rights are granted individually or via templates.

Login to Database... Here you may switch to another database without having to exit the system and re-enter. You will, however, still have to log in to the new database as users may have different access rights between databases. If you are already logged in to the system and wish to change who you are logged in as, while remaining connected to the same database, you may do so here.

User Preferences... If viewed in its entirety, this is a four-page dialog allowing you to set up various preferences covering the look and workings of your own machine. Here you may also change your own password and decide which other user(s) should be allowed to process tasks on your behalf, in case of absence. However, access to this menu item and to each individual page is controlled by the system administrator so the whole menu item or aspects of it may not be present.

View Issued Document... Allows you to view issued documents to which you have access (appears only when the Document Control module is also installed).

Quick document links Providing that the Use document quick launch facility setting is set in the **Workbench Configuration Centre** | Workflow Settings (New User/Personal) and the *Number of links to most recently viewed documents* setting is set between 1 and 10, then the last viewed documents (up to a maximum of 10 and dependent on the *Number of links...* setting) will also be available for viewing here. They will be listed most recent first.

Workstation settings... Allows the setting up of a default database and login that are automatically selected on future start-up. The default dictionary is also set here. Finally you may select which Workbench server to connect to and, optionally, whether the list of servers displayed should be restricted to only those that are running.

Exit Exit the program. A confirmation message is displayed first.

Run

ReportQuest... This menu item is, in effect, the ReportQuest module. It enables you to design and produce reports based on information built up in other installed modules.

Module

In this menu you may gain quick access to any other installed Workbench modules.

Audits You will only be able to use this menu item if you have the Audits module installed. If so, please refer to the Audits Help system for full details on its purpose and function.

Customer Care You will only be able to use this menu item if you have the Customer Care module installed. If so, please refer to the Customer Care Help system for full details on its purpose and function.

Document Control You will only be able to use this menu item if you have the Document Control module installed. If so, please refer to the Document Control Help system for full details on its purpose and function.

Nonconformities You will only be able to use this menu item if you have the Nonconformities

module installed. If so, please refer to the Nonconformities Help system for full details on its purpose and function.

Personnel This module is installed as an integral part of all modules and facilitates all aspects of personnel administration on the system.

ReportQuest You will only be able to use this menu item if you have ReportQuest installed. If so, please refer to the ReportQuest Help system for full details on its purpose and function.

System Manager This module is installed as an integral part of all modules. It allows the system administrator to define and maintain all global system settings, manage individual user access to Workbench and to arrange user logins and passwords.

Test and Calibration You will only be able to use this menu item if you have the Test & Calibration module installed. If so, please refer to the Test and Calibration Help system for full details on its purpose and function.

Training You will only be able to use this menu item if you have the Training module installed. If so, please refer to the Training Help system for full details on its purpose and function.

Help

Contents Gives access to the Table of Contents for on-line Help.

Topic Search Gives an alphabetical index of all Help entries and allows you to type in and search for specific topics.

How to use Help Explains how to get the best out of your Help system.

About Workbench Gives information on the version of Workbench and the number / usage of licences.

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