

**Slide 1 - Slide 1**

The screenshot shows the IES Client v8.29 interface. The title bar reads "IES Client v8.29 : My IES". The menu bar includes "Help", "Submit", "Quit", "Functions", and "Commands". The toolbar contains icons for key, help, search, heart, clock, left arrow, right arrow, list, cube, refresh, checkmark, and close. The main window has a tabbed interface with four tabs: "1 Console", "2 Pre Run", "3 The Tags", and "4 Options". The "2 Pre Run" tab is active, displaying the "PRE RUN PARAMETERS: -" section. This section includes a "Pre Run Assist" link and a help icon. The parameters are as follows:

Pre Run Process	docwritespre-lyear-dept
Results File	docwritespre
Results Key	*user
Proceed on Field #	10
Conditional Value	Y

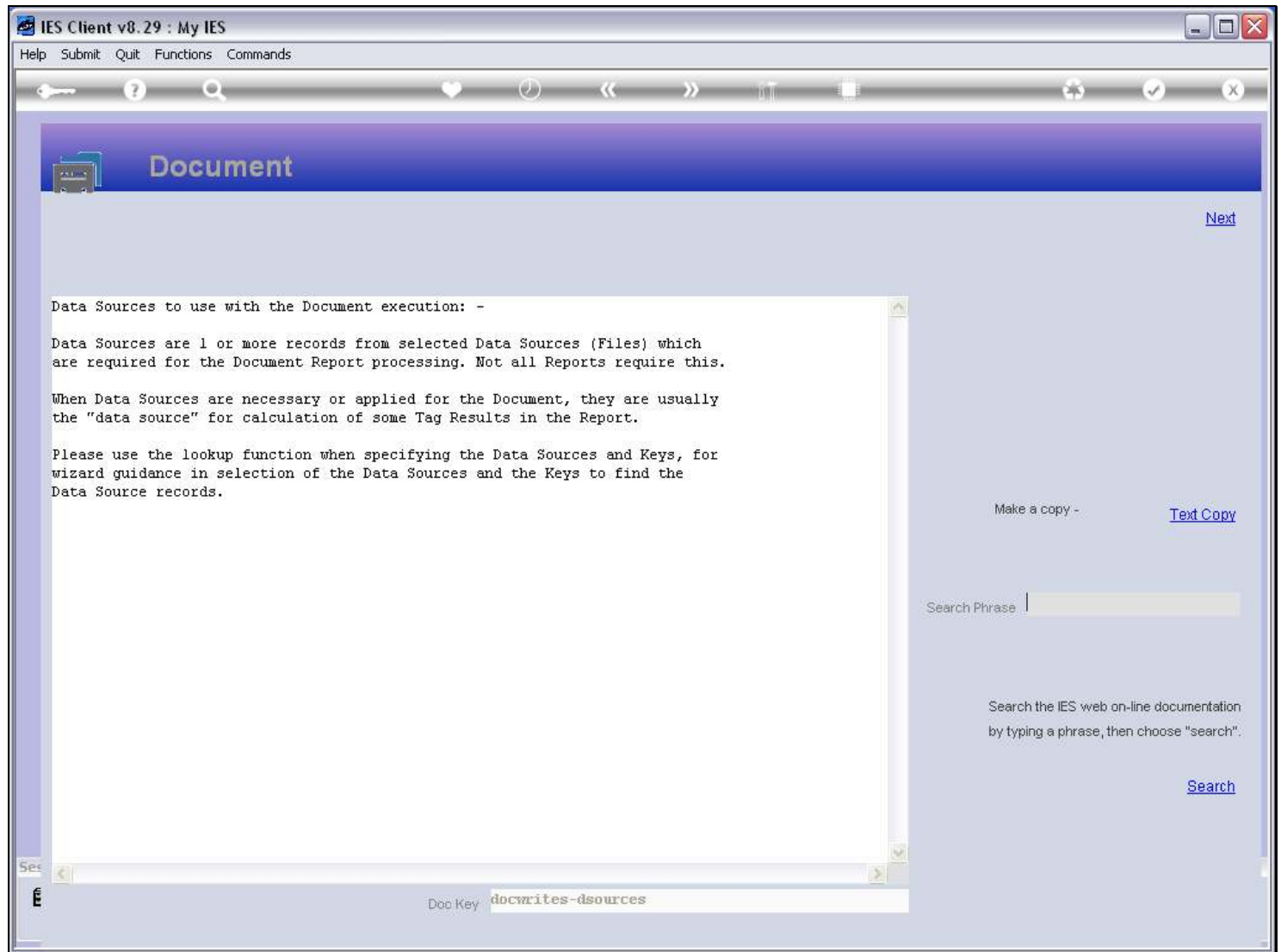
Below the parameters is the "DIRECT REFERENCE DATA SOURCES: -" section, which includes a table with two columns: "Data Sources" and "Data Keys". The table has one row with the value "1" in the "Data Sources" column. A help icon is also present next to this section.

Data Sources	Data Keys
1	

**Slide notes**

DocWriter has an introductory Help on the subject of Data Sources.

## Slide 2 - Slide 2



### Slide notes

Not all Reports need Data Sources to be listed, because some Templates allow direct access to Data Sources without being listed in this section. It really depends on the type of Report, and the Tag Logic that may be required.

**Slide 3 - Slide 3**

The screenshot shows the IES Client v8.29: My IES window. The title bar includes the application name and standard window controls. The menu bar contains 'Help', 'Submit', 'Quit', 'Functions', and 'Commands'. The toolbar has icons for key, help, search, heart, clock, left arrow, right arrow, list, document, refresh, checkmark, and close. The main content area is titled 'Document' and contains the following text:

Data Sources to use with the Document execution: -

Data Sources are 1 or more records from selected Data Sources (Files) which are required for the Document Report processing. Not all Reports require this.

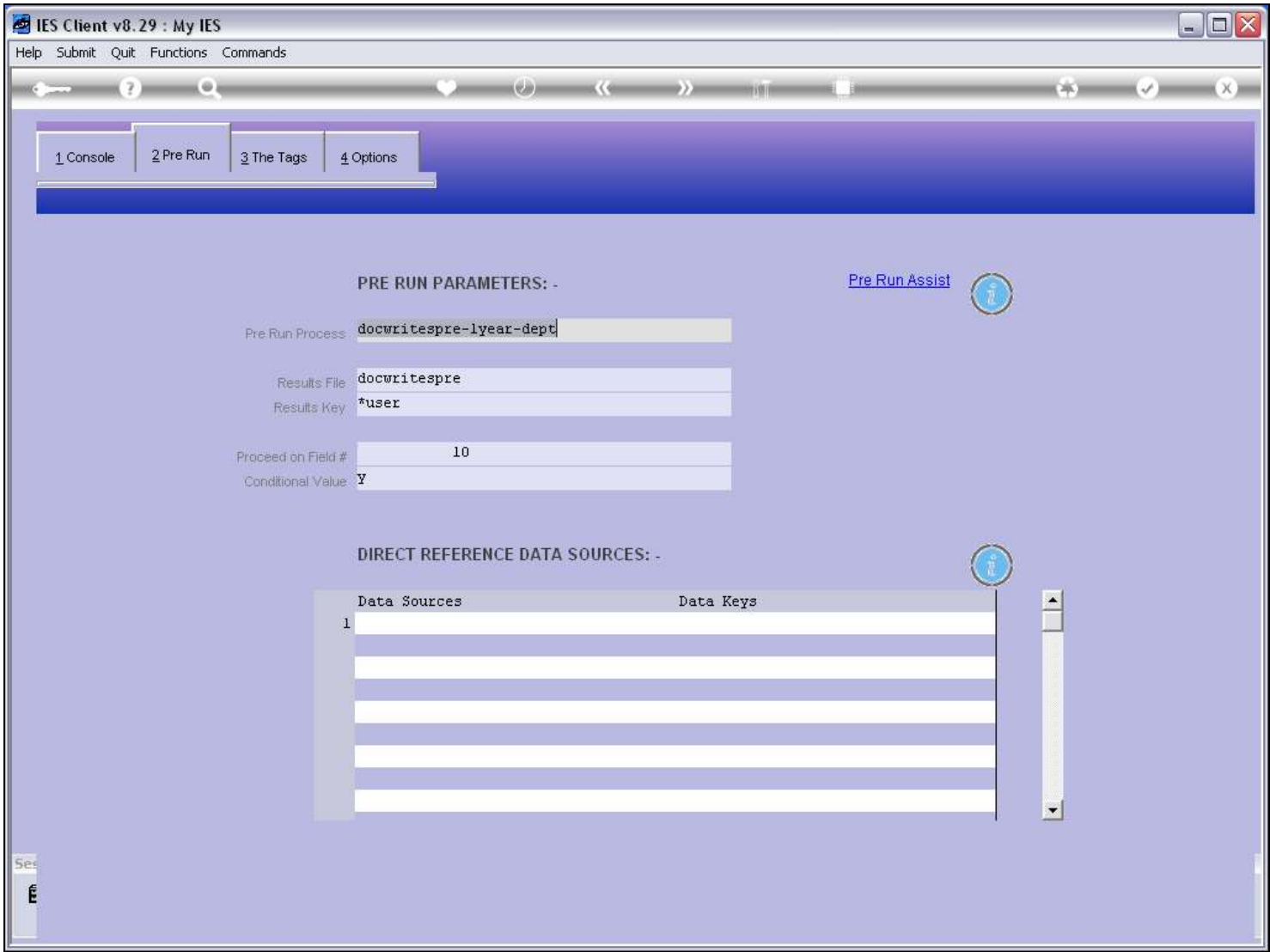
When Data Sources are necessary or applied for the Document, they are usually the "data source" for calculation of some Tag Results in the Report.

Please use the lookup function when specifying the Data Sources and Keys, for wizard guidance in selection of the Data Sources and the Keys to find the Data Source records.

On the right side of the window, there is a 'Next' link, a 'Make a copy -' button with a 'Text Copy' link, a 'Search Phrase' input field, and a 'Search' link. At the bottom, there is a 'Doc Key' field with the value 'docwrites-dsources'.

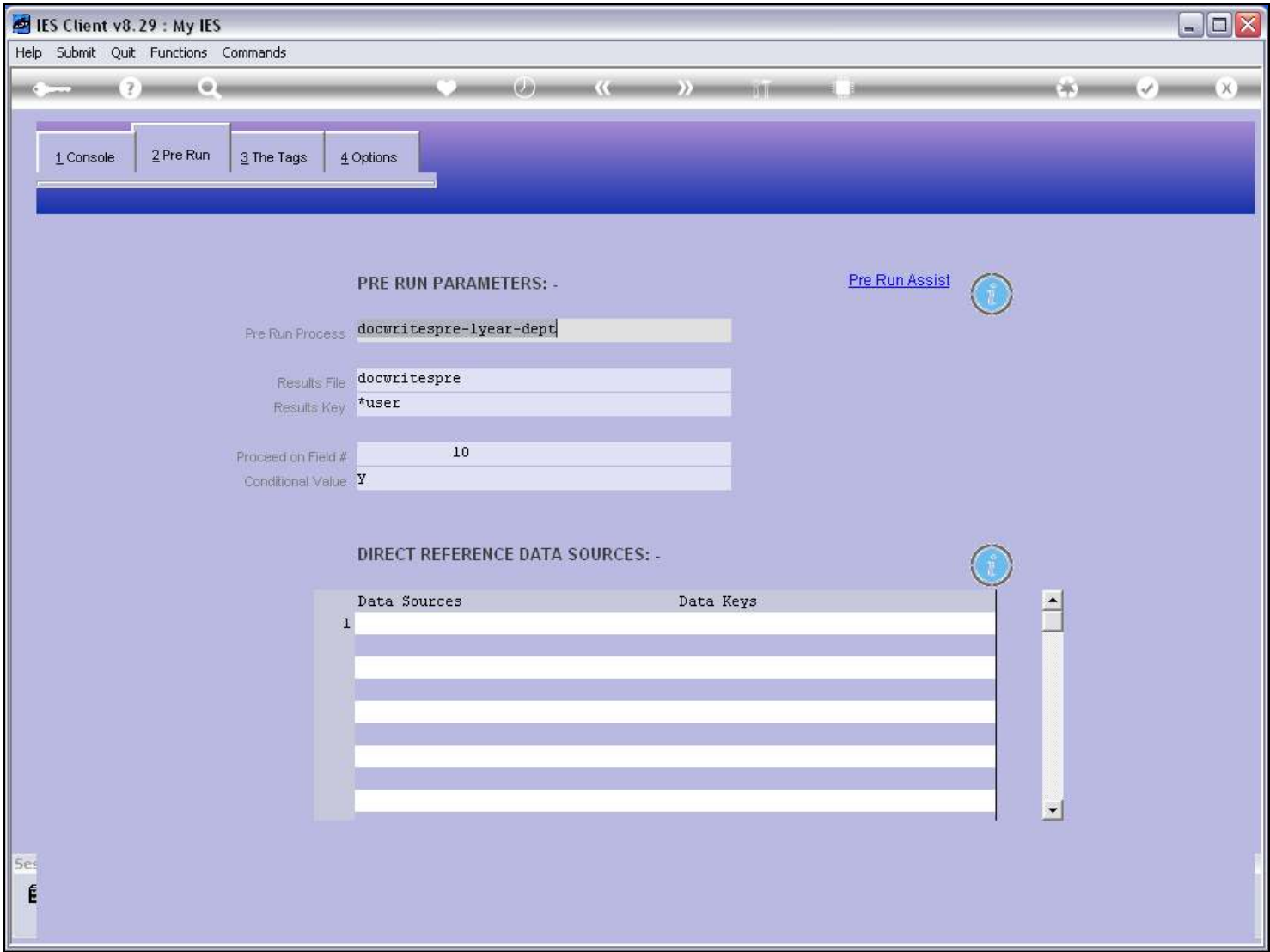
**Slide notes**

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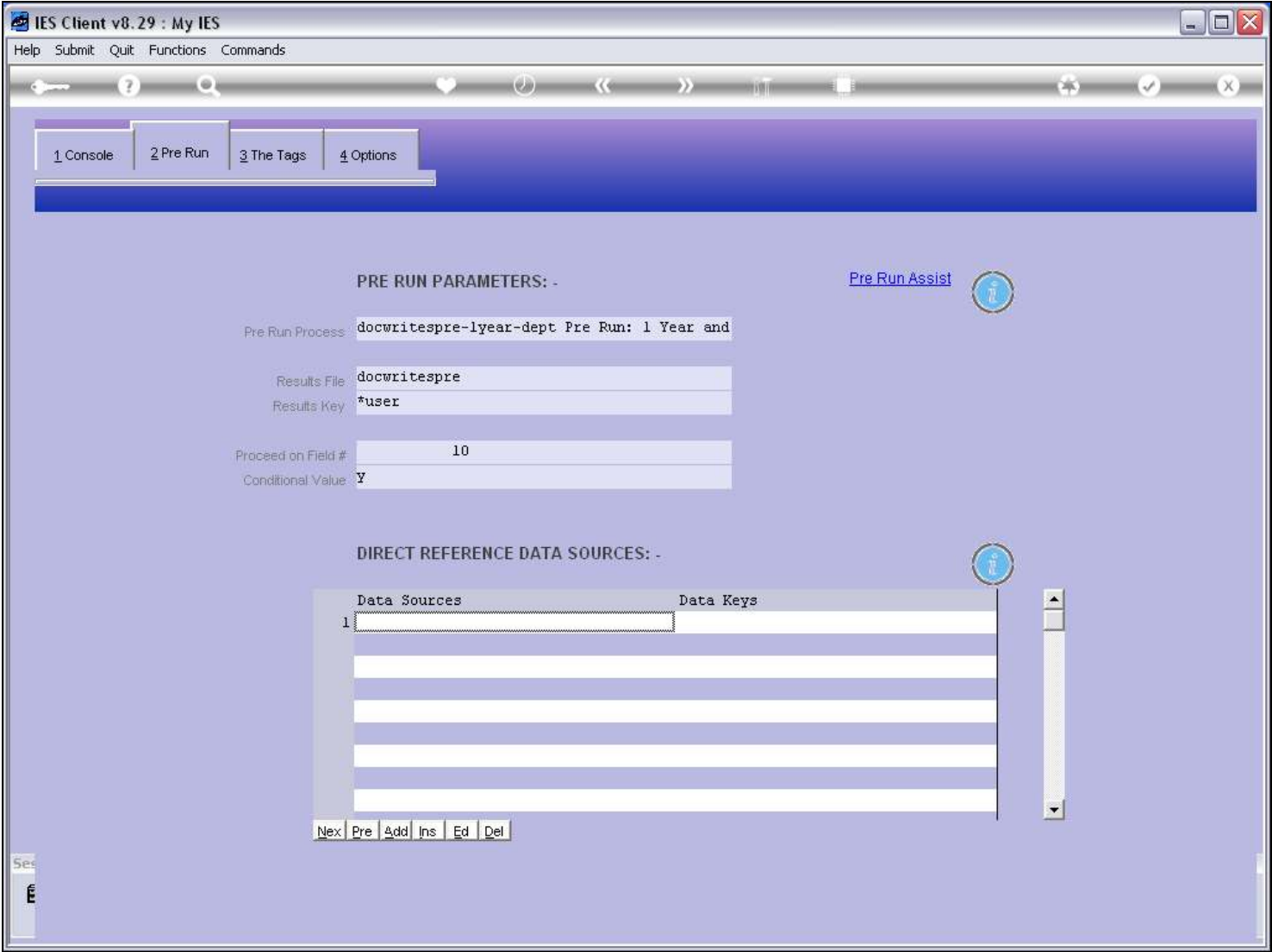
Slide notes

Slide 5 - Slide 5



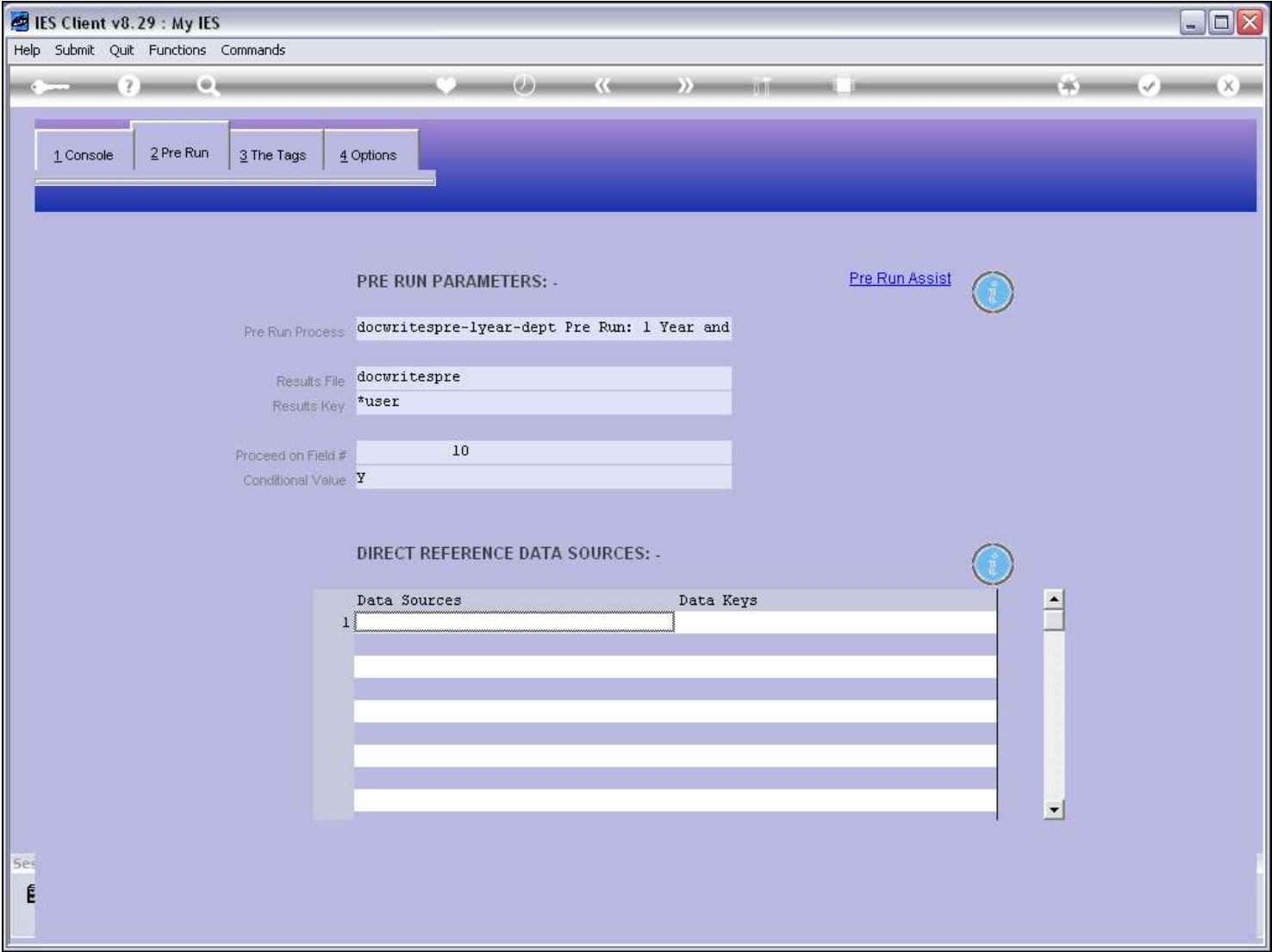
Slide notes

Slide 6 - Slide 6



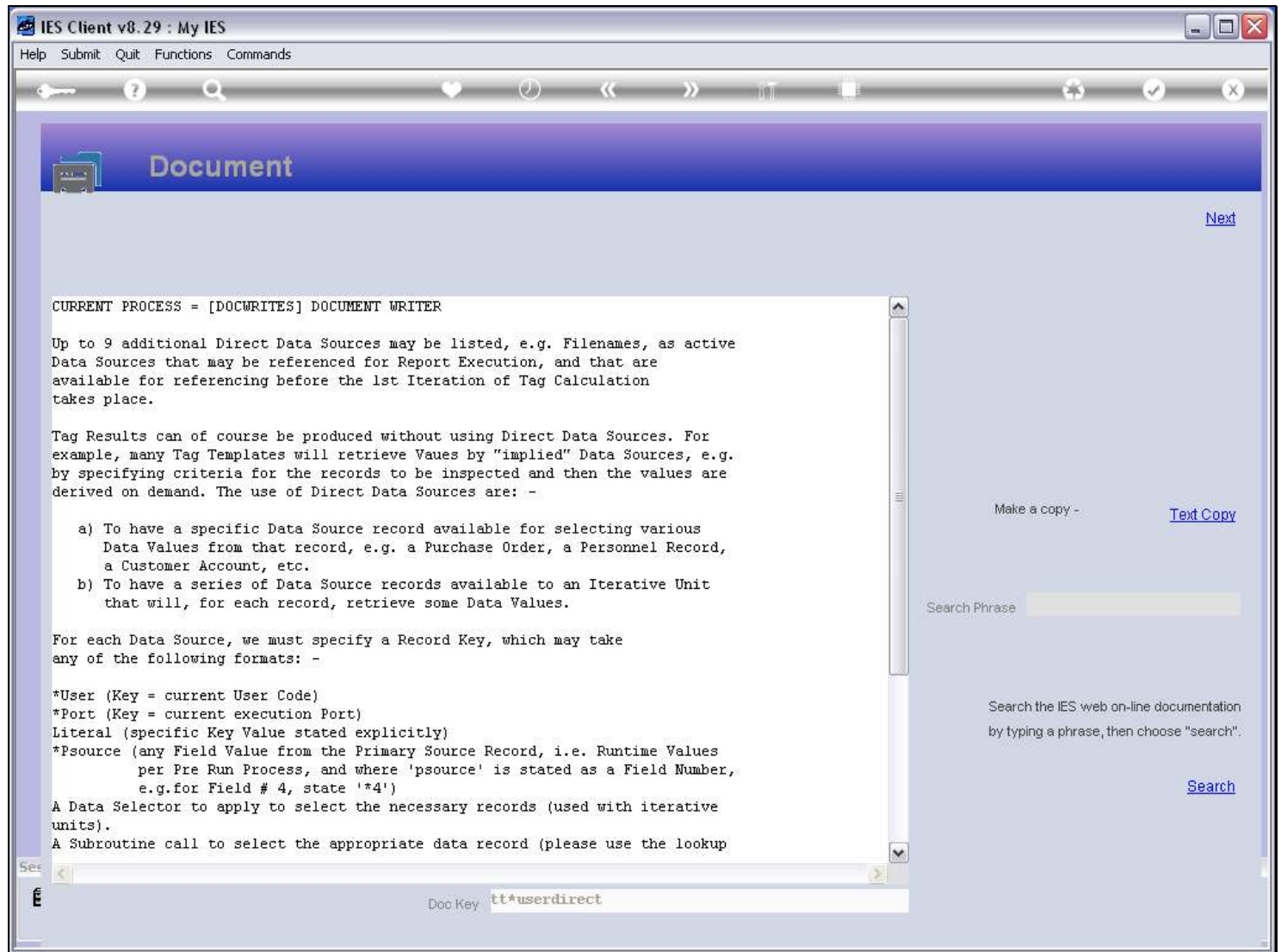
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## Slide 8 - Slide 8



### Slide notes

When we check the Help on the 'Data Sources' field, there is a more extensive explanation. For Units, we will usually need a Data Source listed. Either there is a pre-formatted record in a Data Source like DOCWRITESPRE, with Data Iteration in this record, or else we may be using a Data Selector to select a Range of Records where we will use Name type Tag Templates on the listed Data Source, for each selected Record. Other than for Units, we may also use a Data Source, and more likely than not it will be a single Key from the listed Data Source that we work with, for the Report.

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**Slide notes**

**Slide 10 - Slide 10**

The screenshot shows the IES Client v8.29: My IES application window. The title bar includes 'Help', 'Submit', 'Quit', 'Functions', and 'Commands'. The main content area is titled 'Document' and contains the following text:

a) To have a specific Data Source record available for selecting various Data Values from that record, e.g. a Purchase Order, a Personnel Record, a Customer Account, etc.

b) To have a series of Data Source records available to an Iterative Unit that will, for each record, retrieve some Data Values.

For each Data Source, we must specify a Record Key, which may take any of the following formats: -

- \*User (Key = current User Code)
- \*Port (Key = current execution Port)
- Literal (specific Key Value stated explicitly)
- \*Psource (any Field Value from the Primary Source Record, i.e. Runtime Values per Pre Run Process, and where 'psource' is stated as a Field Number, e.g. for Field # 4, state '\*4')

A Data Selector to apply to select the necessary records (used with iterative units).

A Subroutine call to select the appropriate data record (please use the lookup function to assist in this).

**Function**

A Document Writer Master Object defines an HTML Document or Report.

**Caution**

None.

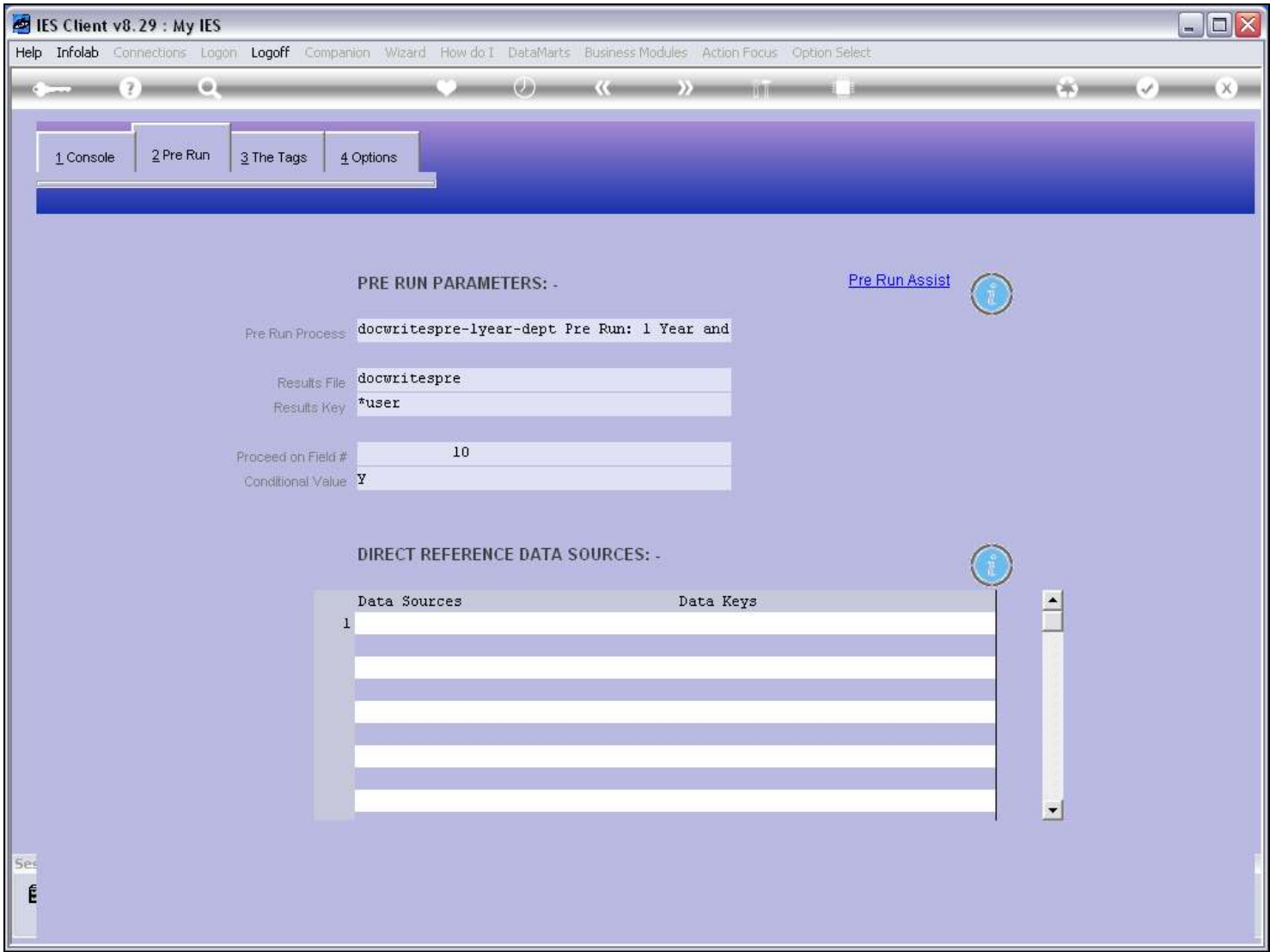
**Description**

Doc Key: tt\*userdirect

On the right side of the window, there is a search bar labeled 'Search Phrase' and a 'Text Copy' button. Below the search bar, there is a link to 'Search'.

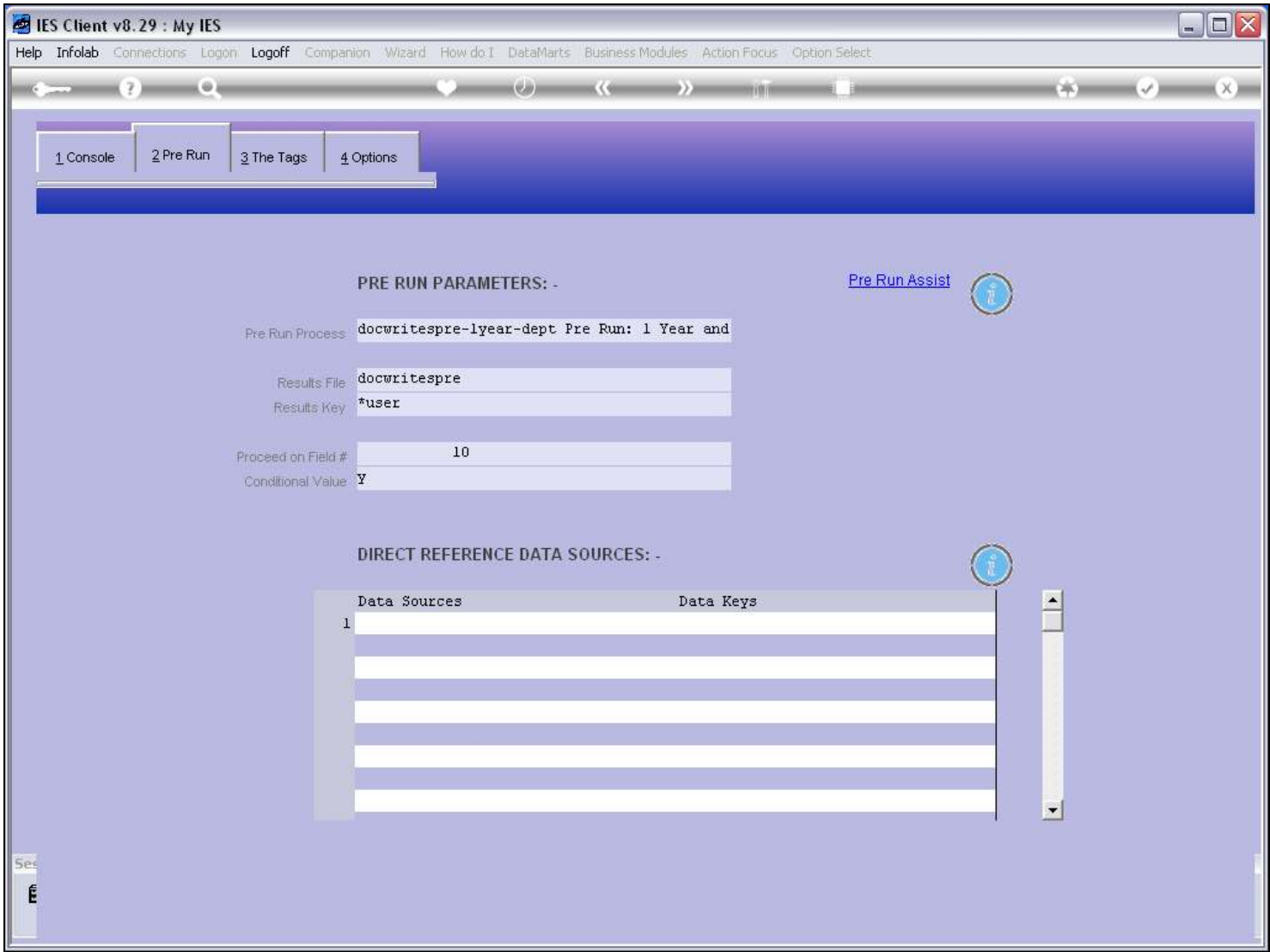
**Slide notes**

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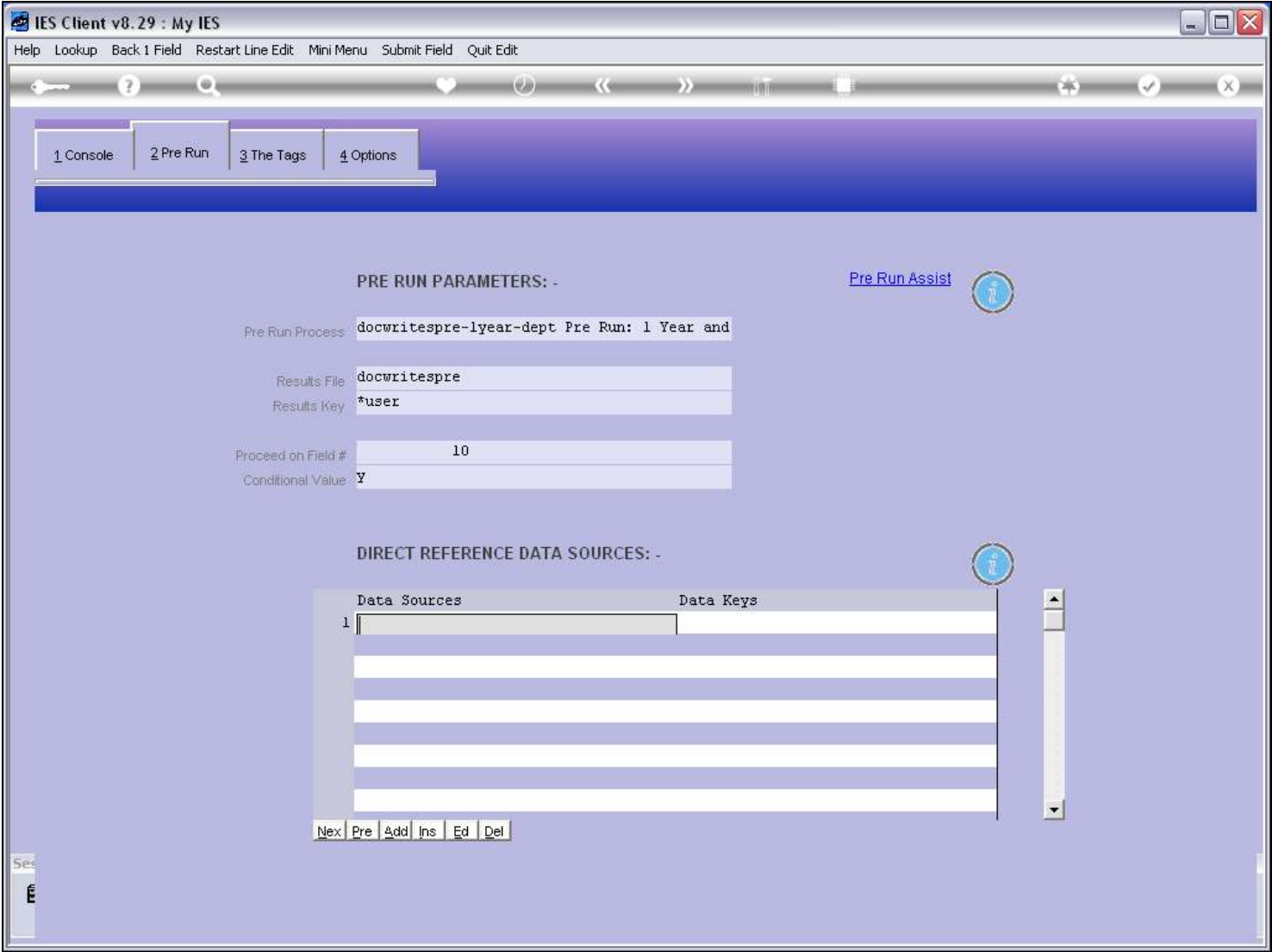
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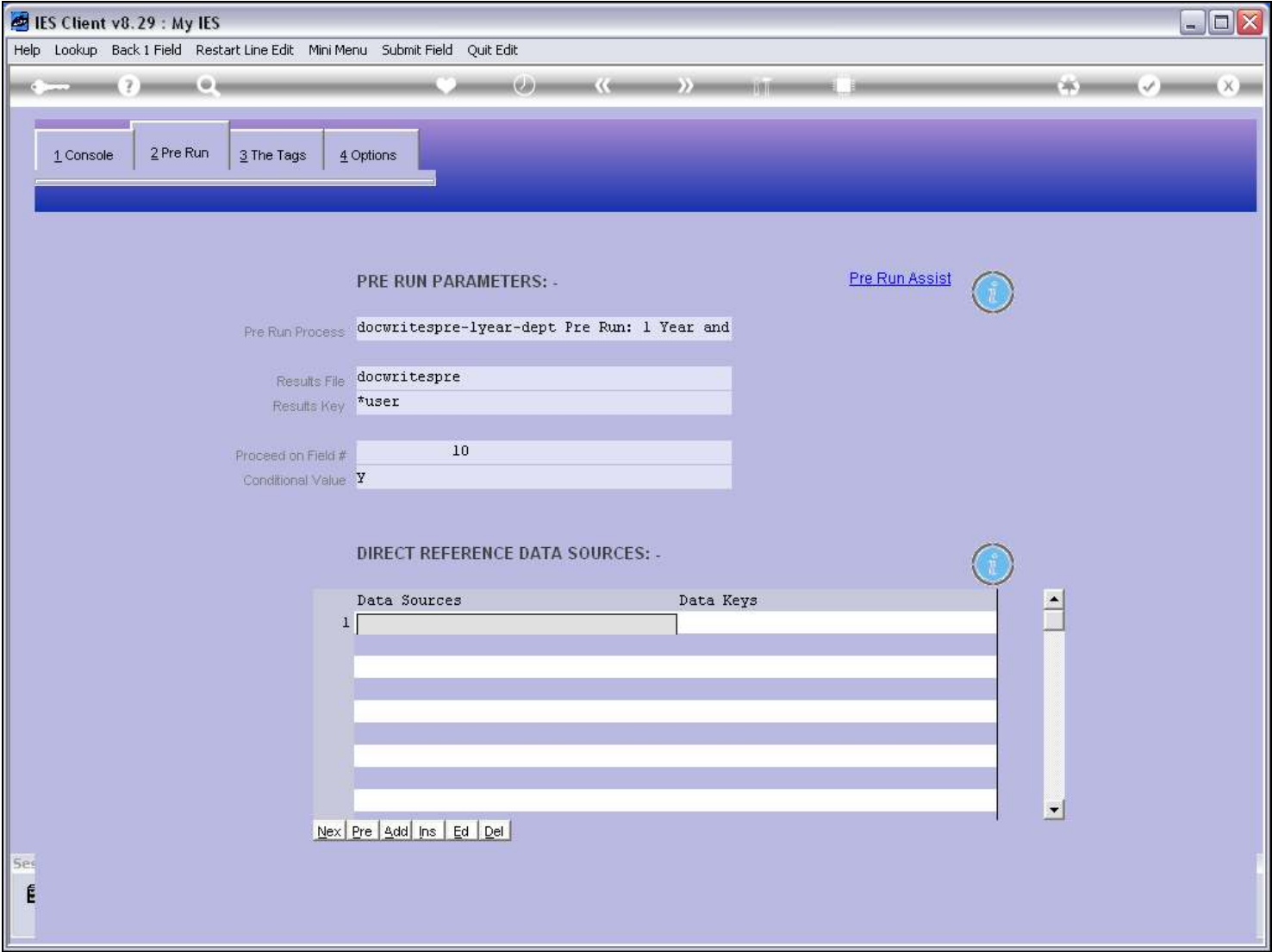
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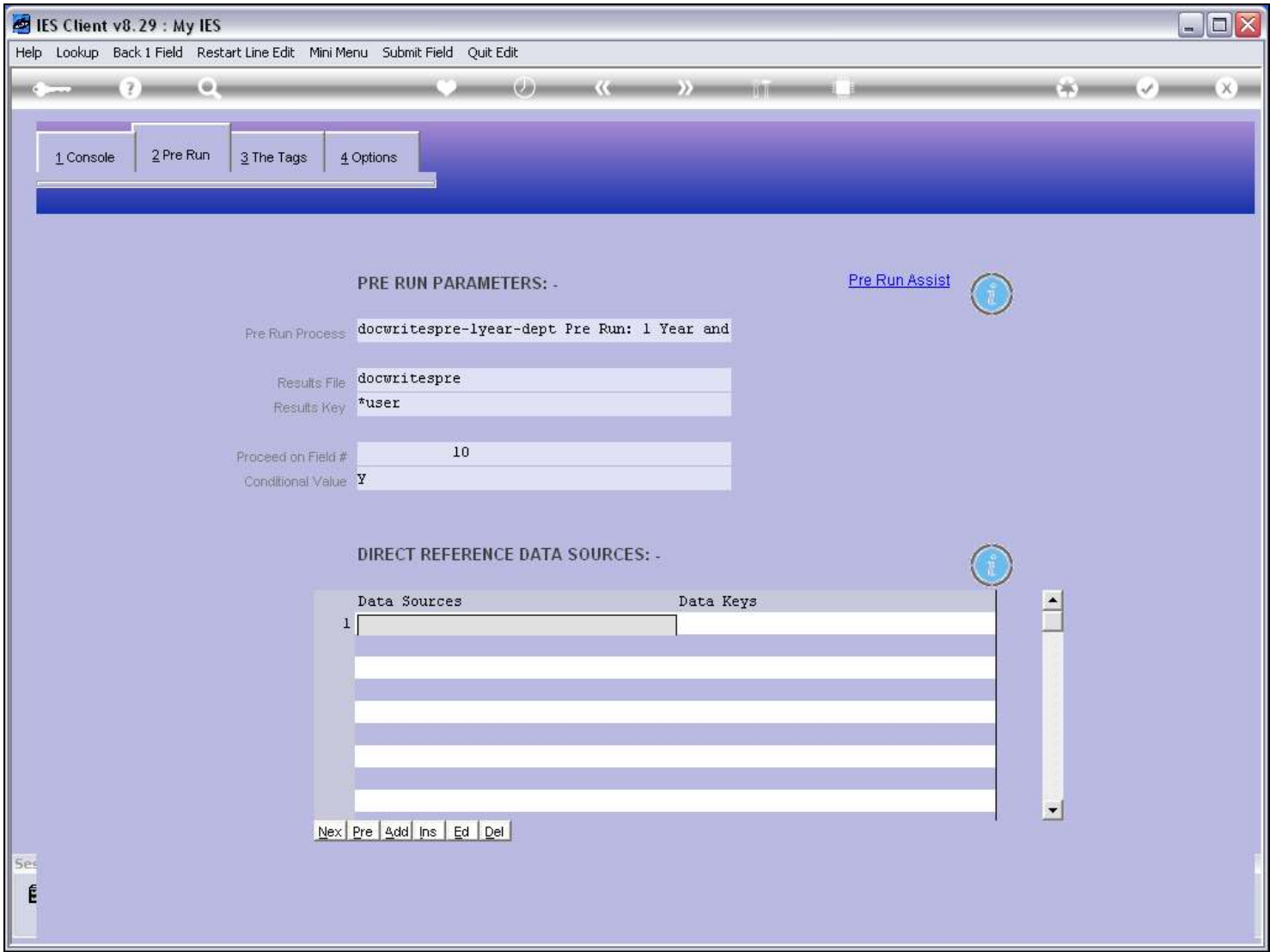
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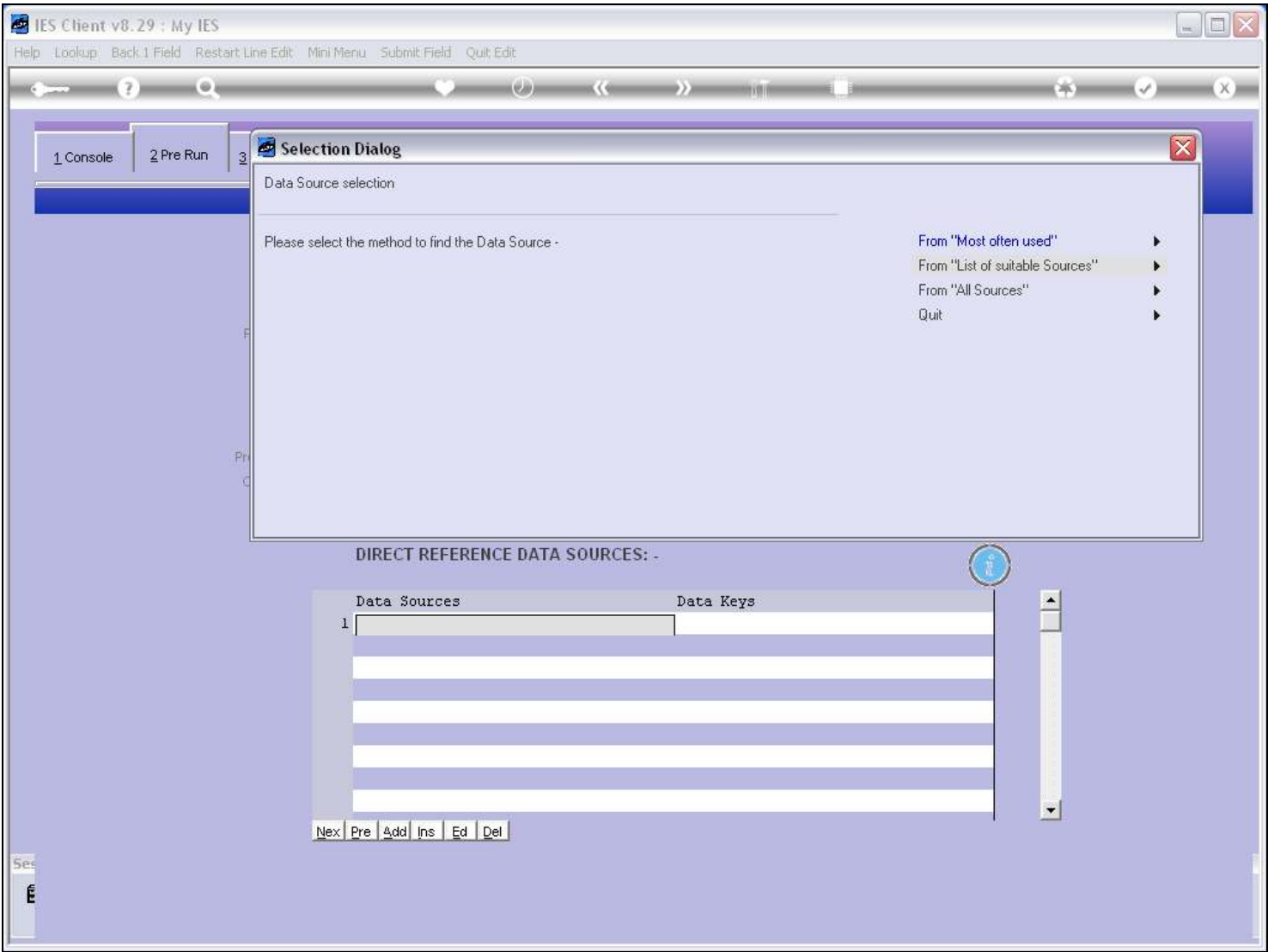
When we need to list a Data Source, we can always use the metadata lookup.

**Slide 16 - Slide 16**



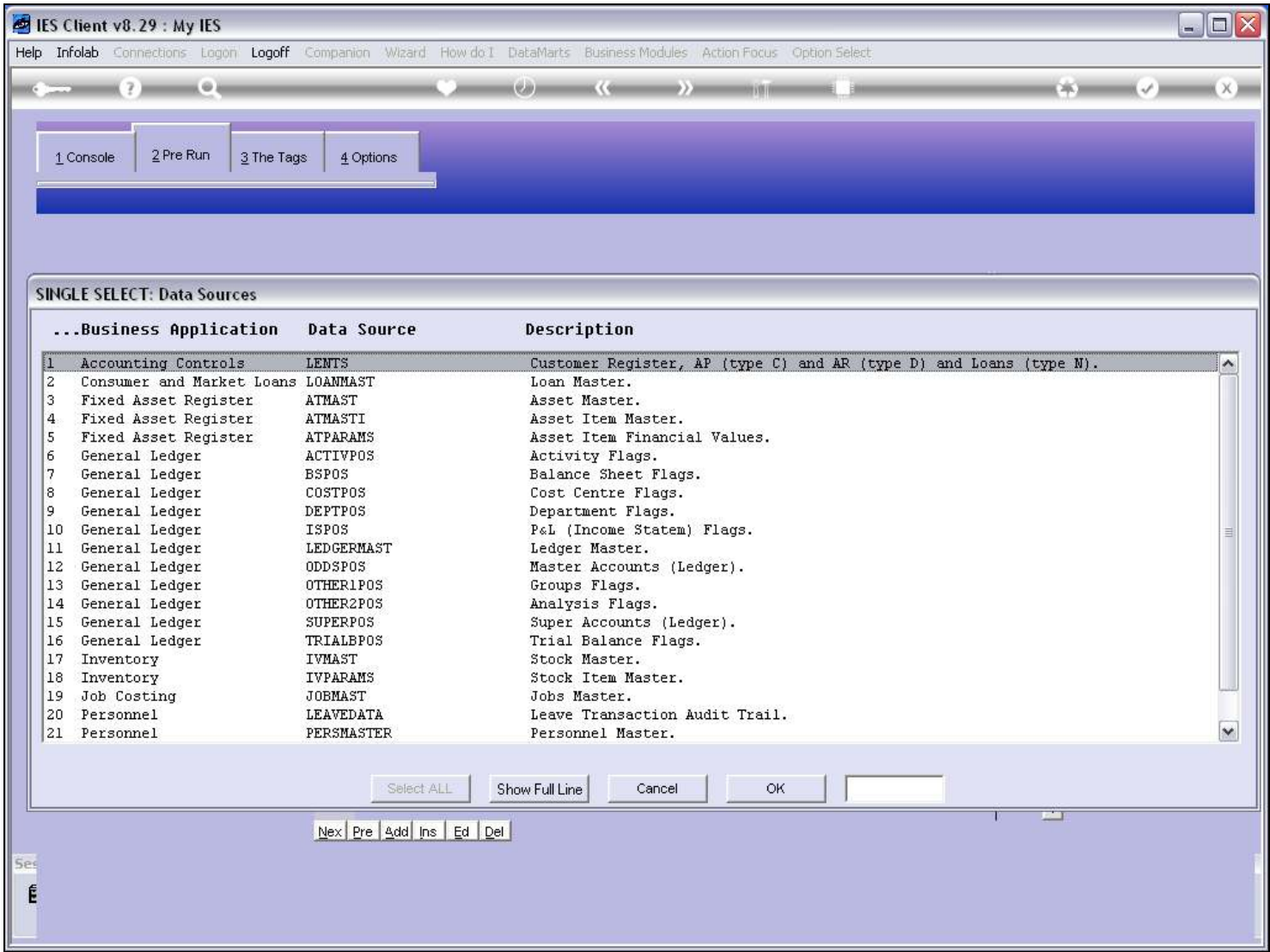
**Slide notes**

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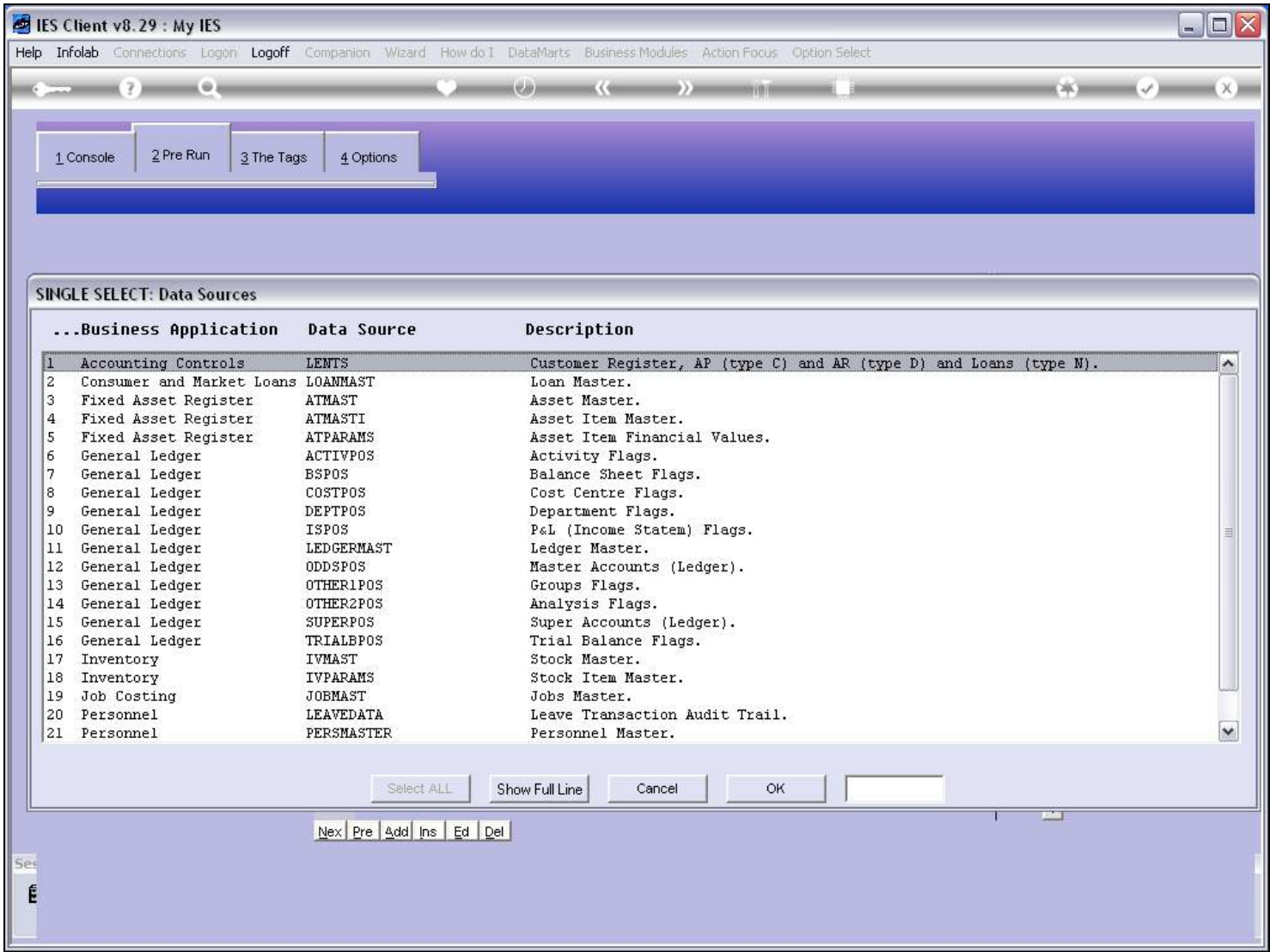
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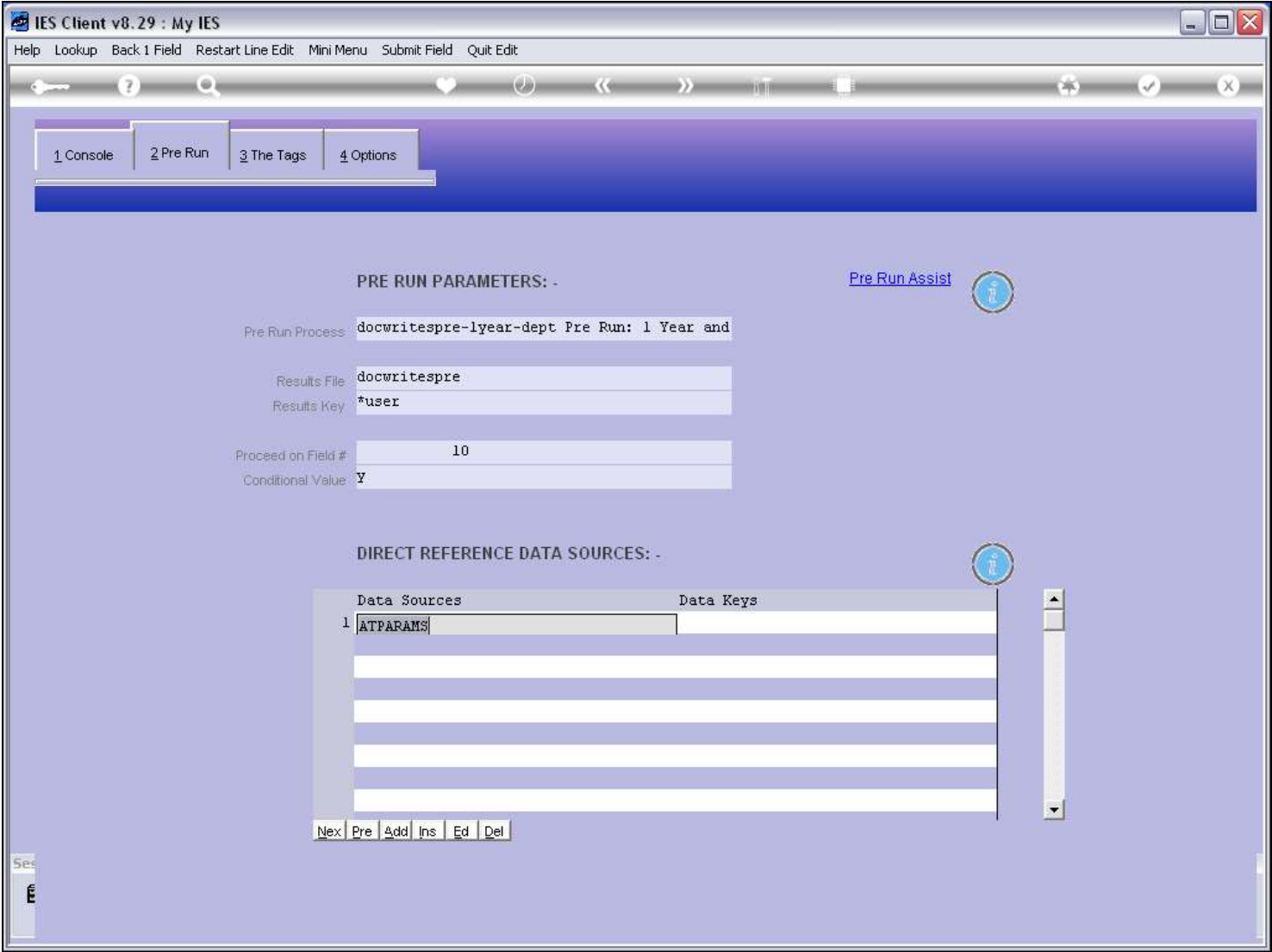
Slide notes

Slide 19 - Slide 19



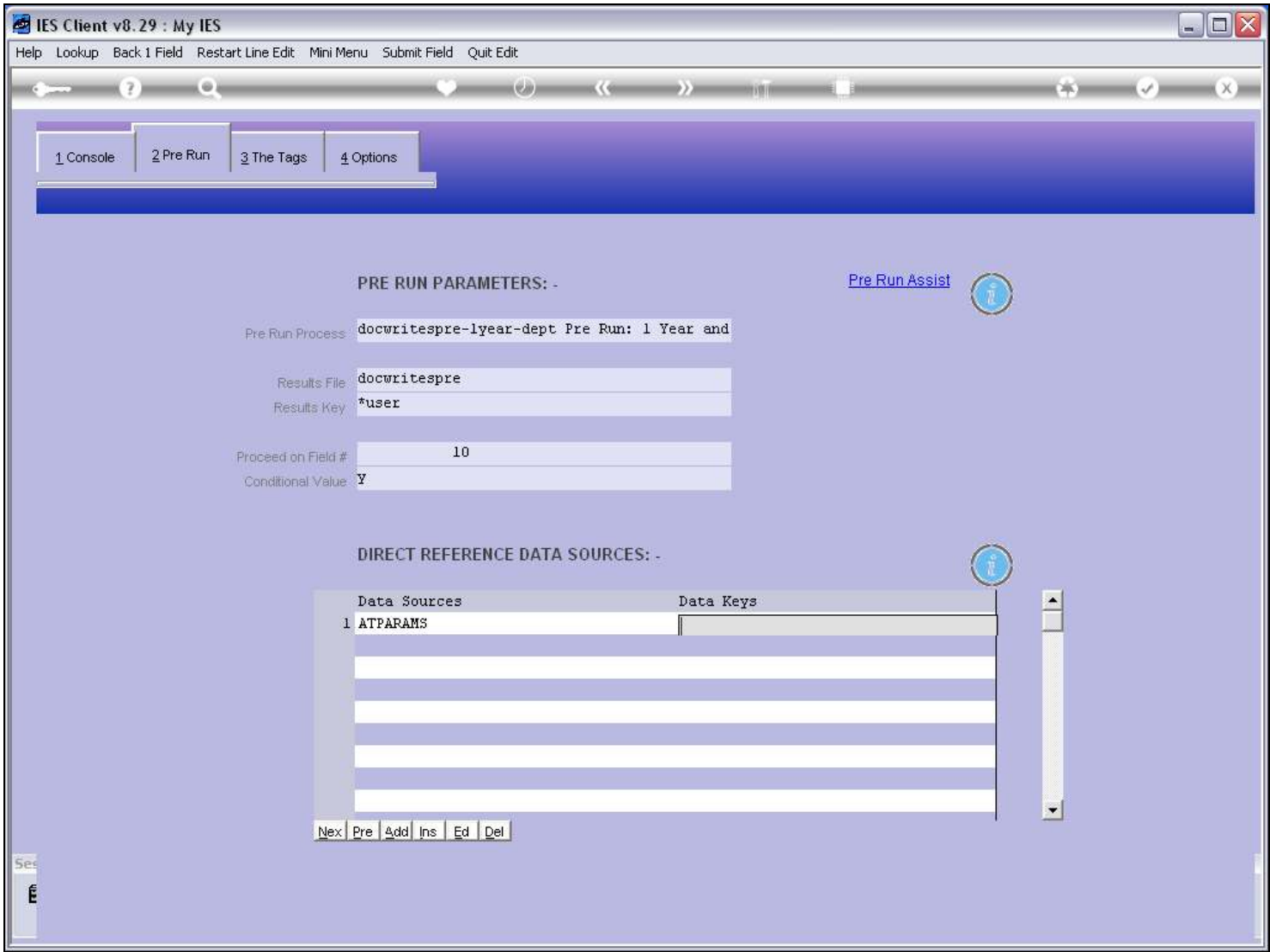
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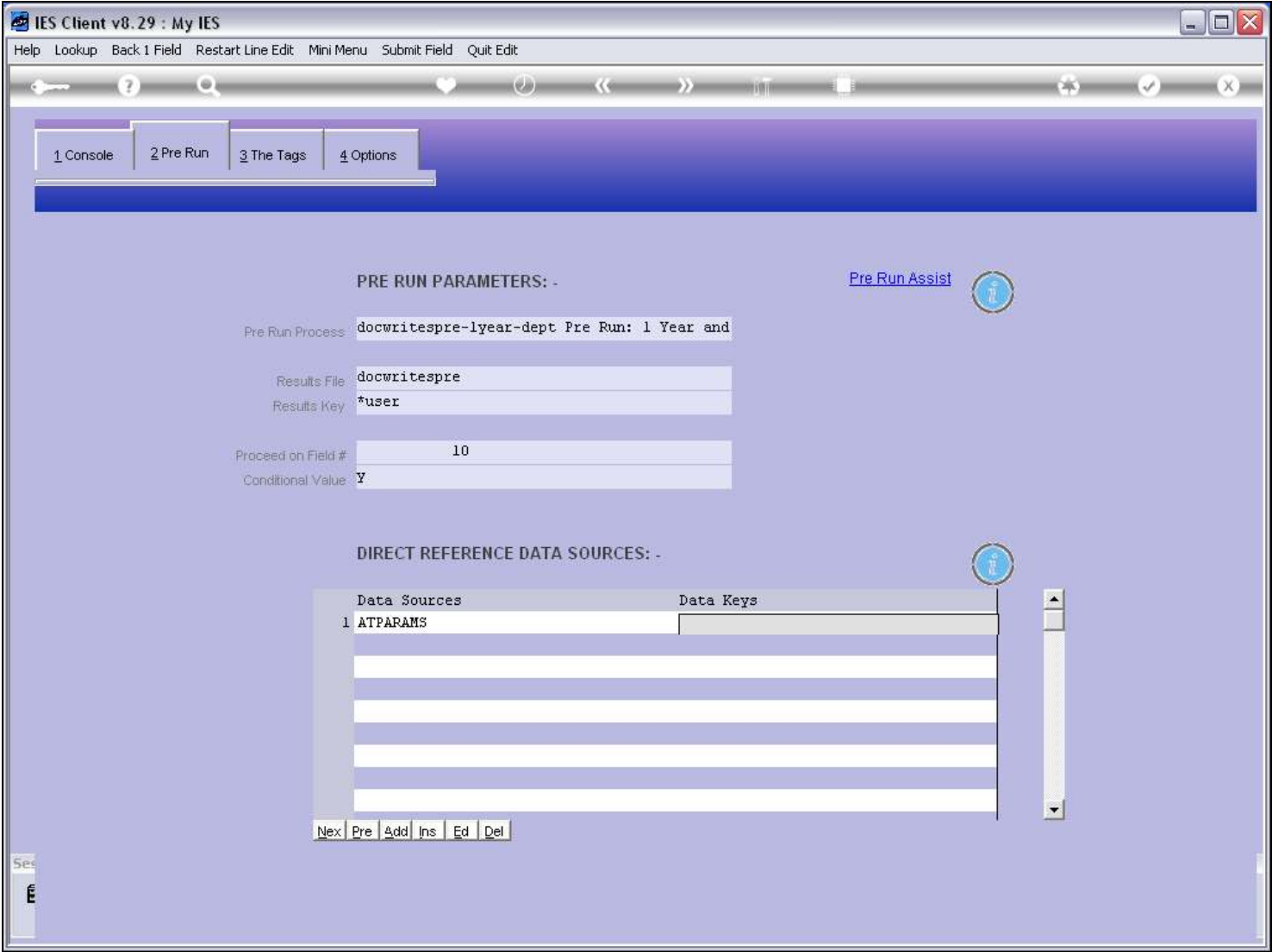
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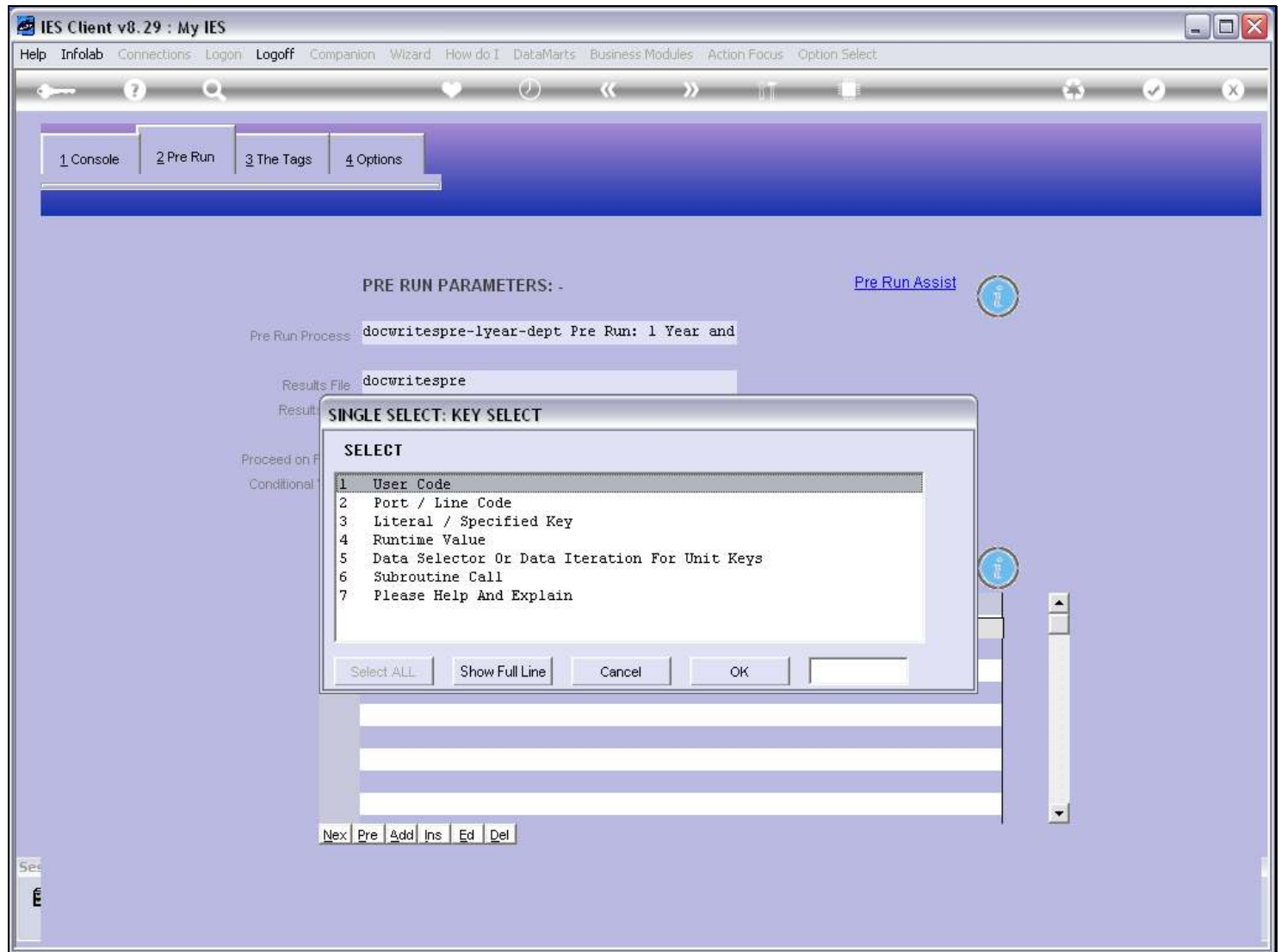


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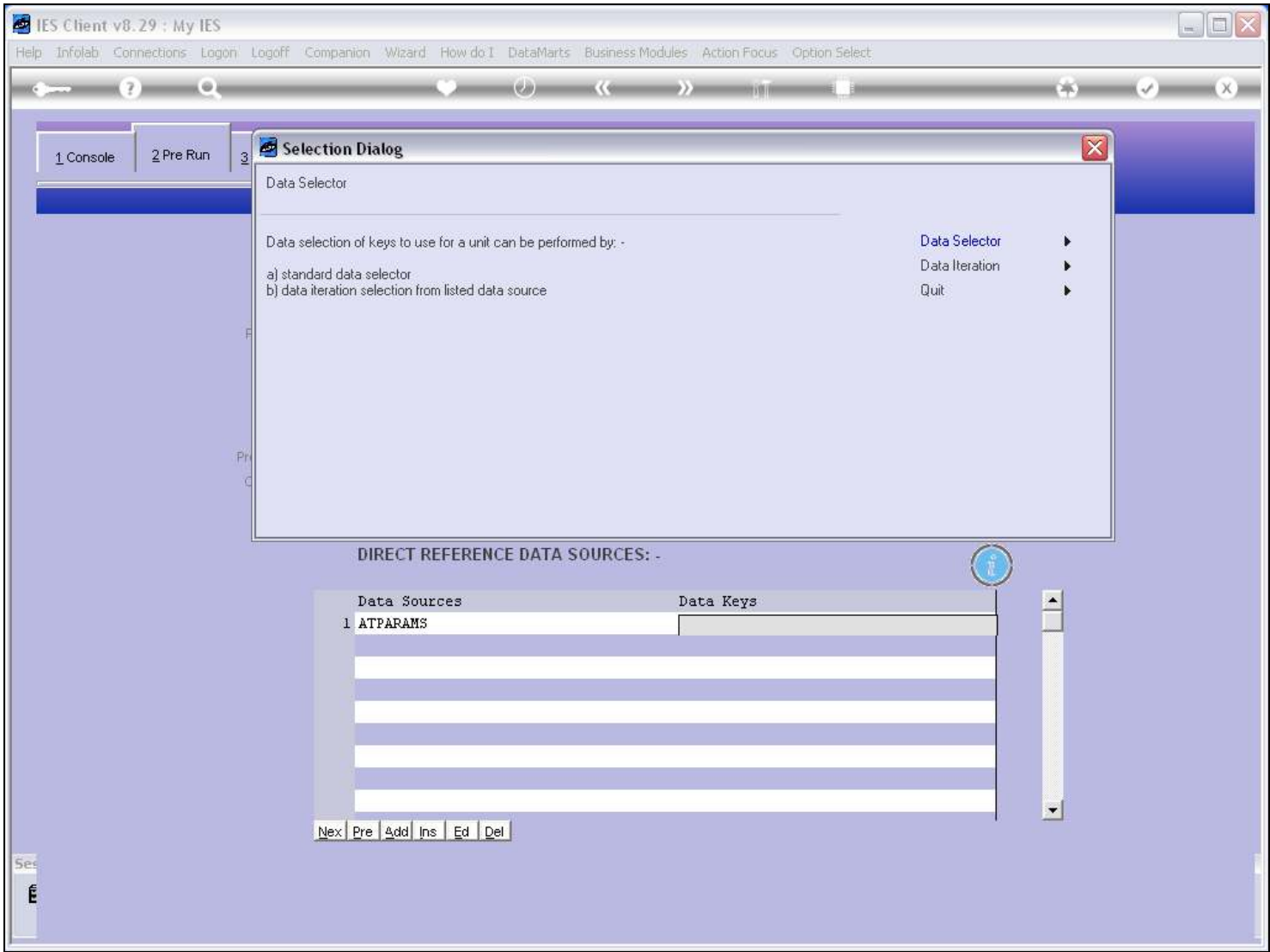


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**Slide 23 - Slide 23****Slide notes**

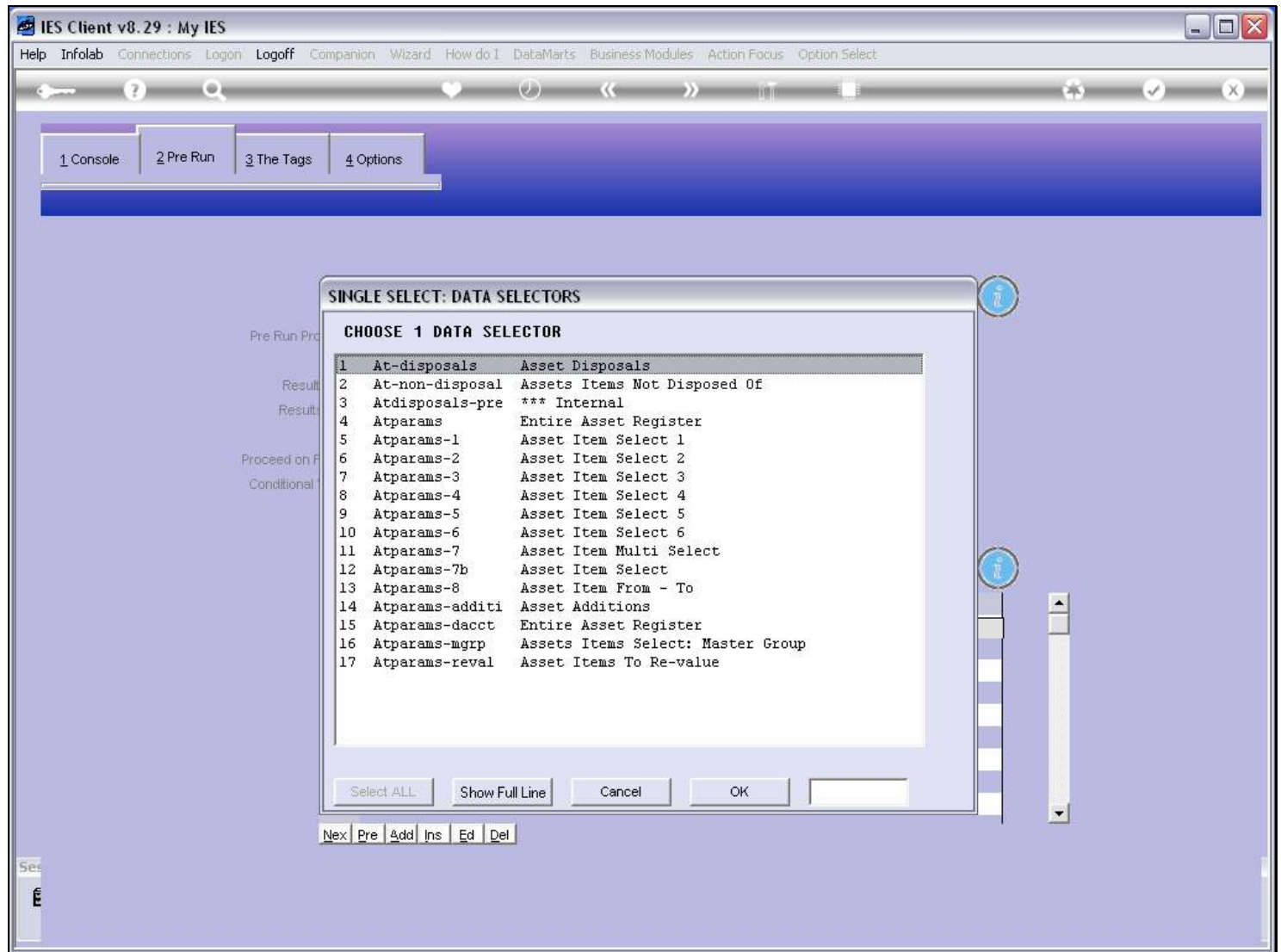
When we need a Data Selector for the Source, then we can use the lookup for that as well, and the lookup will intuitively operate on the indicated Data Source.

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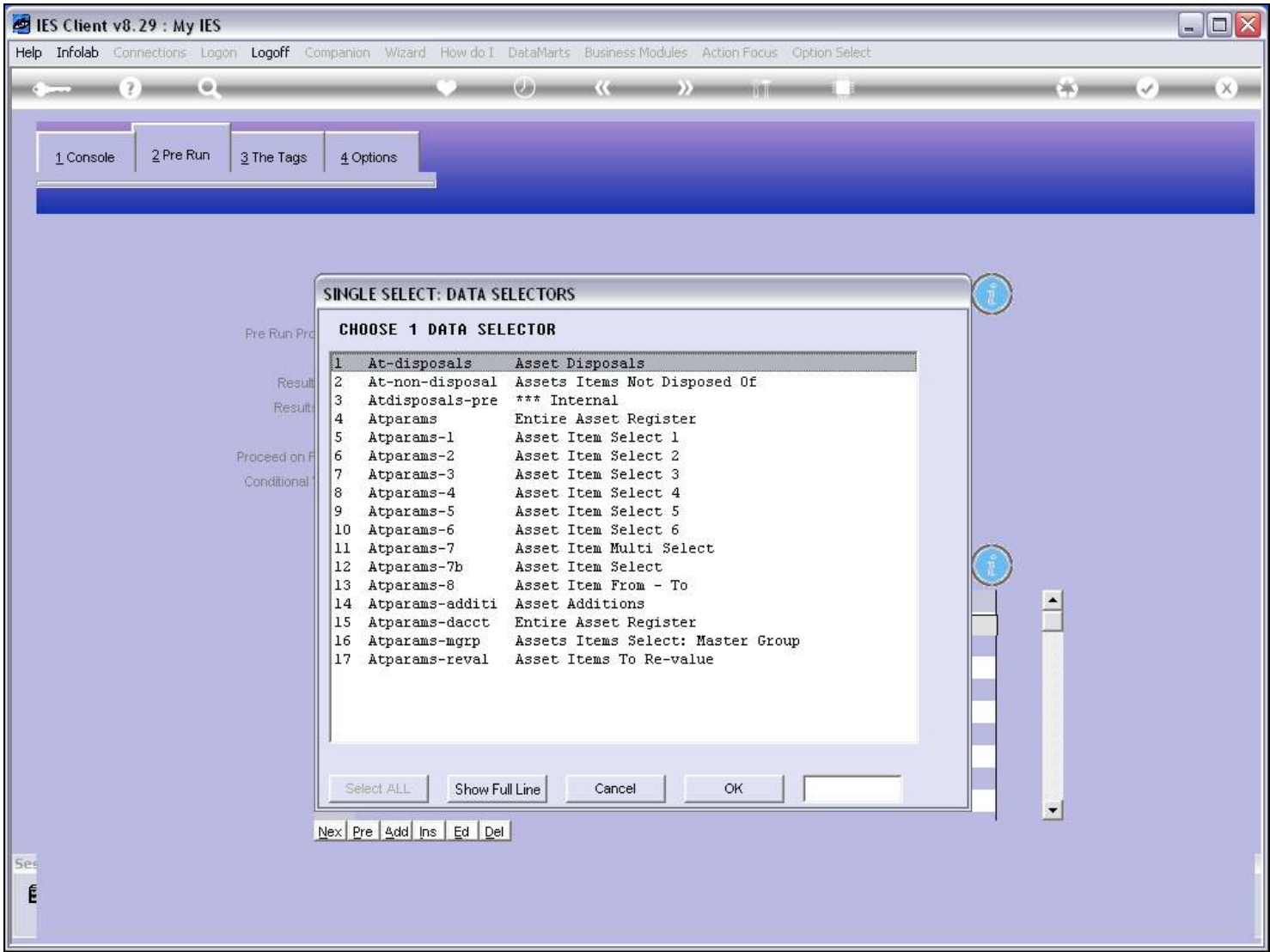
Slide notes

## Slide 25 - Slide 25



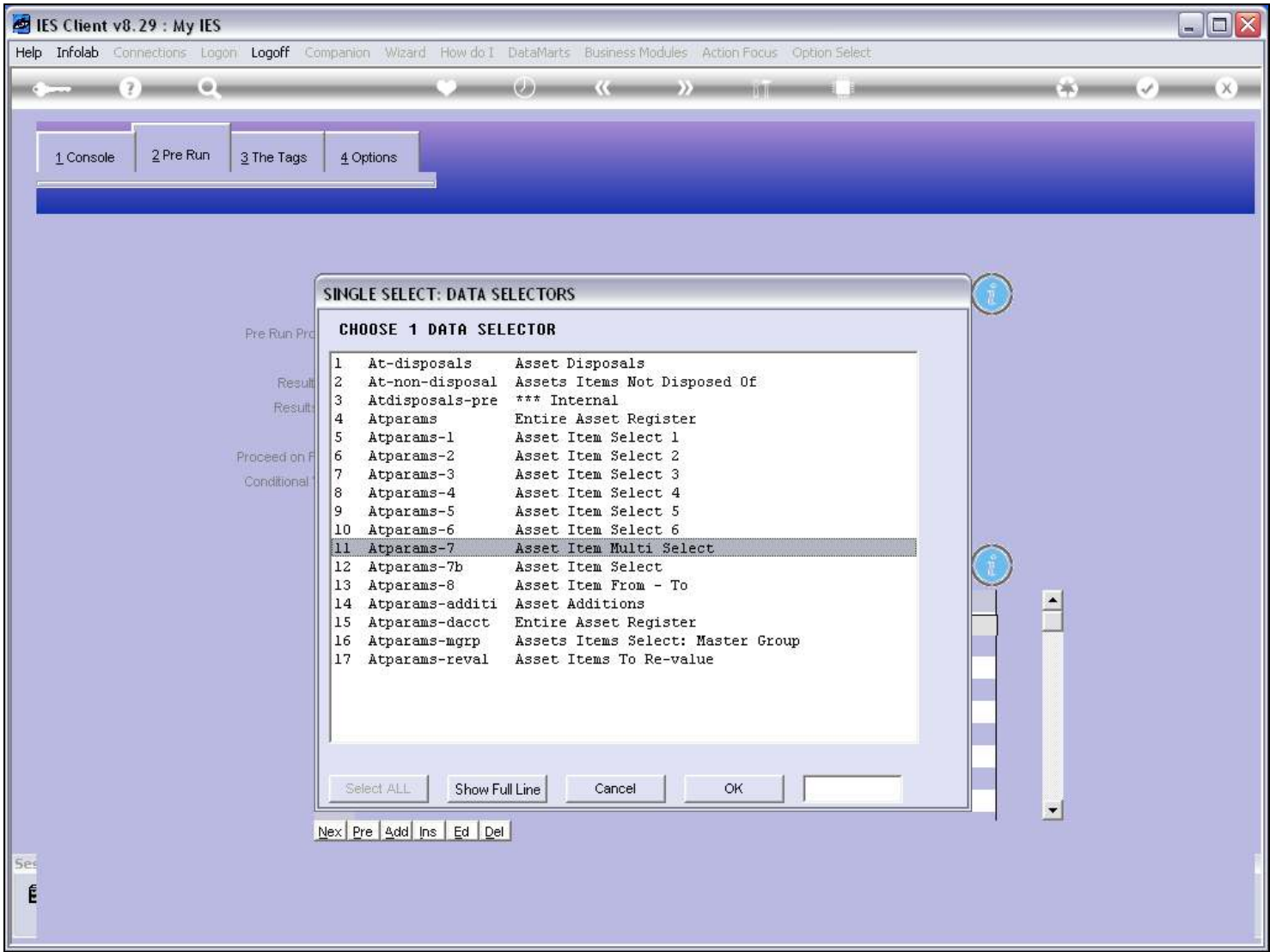
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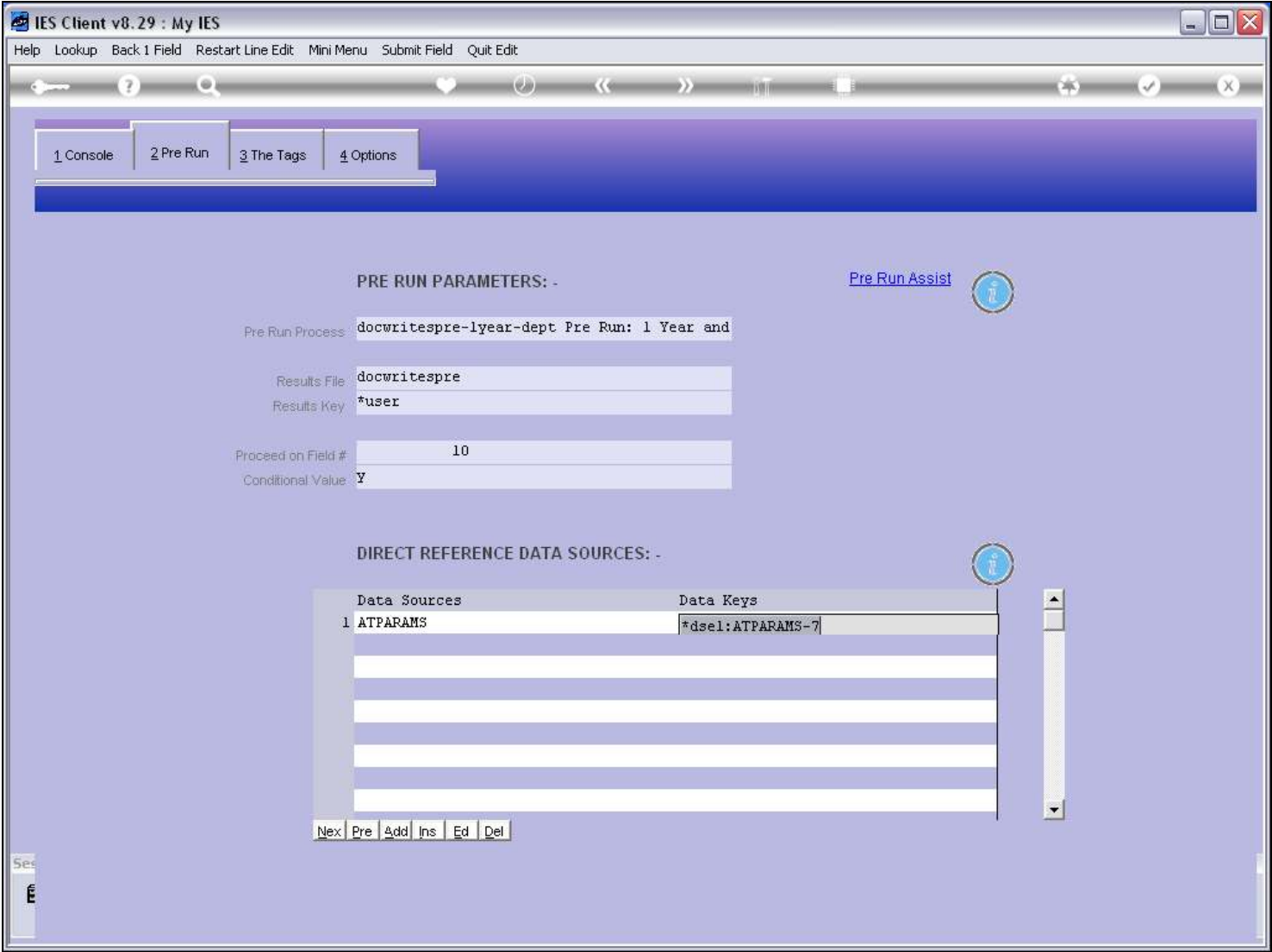
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**Slide 29 - Slide 29**

The screenshot shows the IES Client v8.29: My IES interface. The top menu bar includes Help, Lookup, Back 1 Field, Restart Line Edit, Mini Menu, Submit Field, and Quit Edit. Below the menu is a toolbar with icons for key, help, search, heart, clock, left arrow, right arrow, list, print, refresh, checkmark, and close. The main window has a tabbed interface with four tabs: 1 Console, 2 Pre Run (selected), 3 The Tags, and 4 Options.

**PRE RUN PARAMETERS: -**

[Pre Run Assist](#) 

Pre Run Process: docwritespre-lyear-dept Pre Run: 1 Year and


Results File: docwritespre

Results Key: \*user

Proceed on Field #: 10

Conditional Value: Y

**DIRECT REFERENCE DATA SOURCES: -**



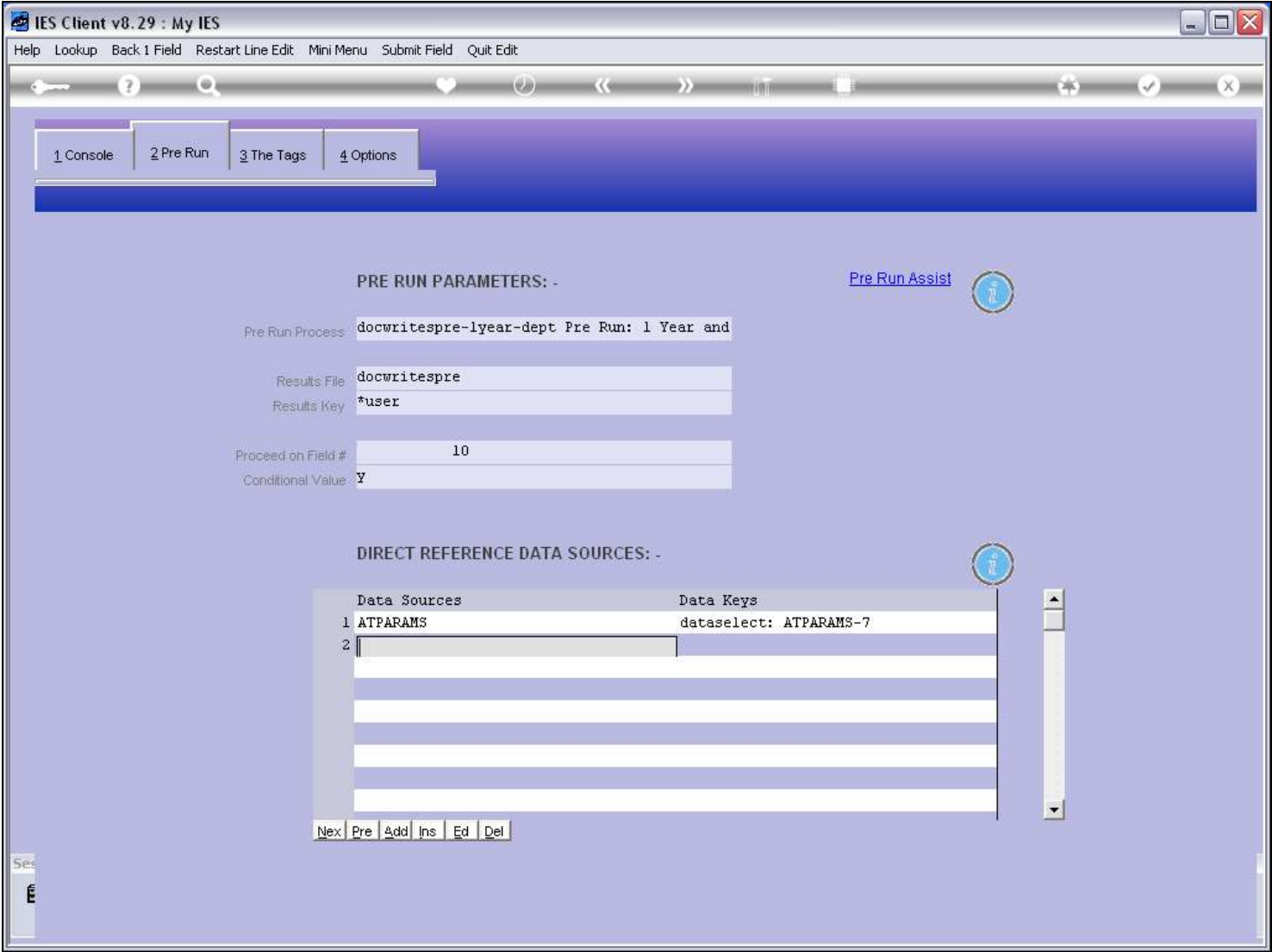
Data Sources	Data Keys
1 ATPARAMS	dataselect: ATPARAMS-7
2	

Nex Pre Add Ins Ed Del

**Slide notes**

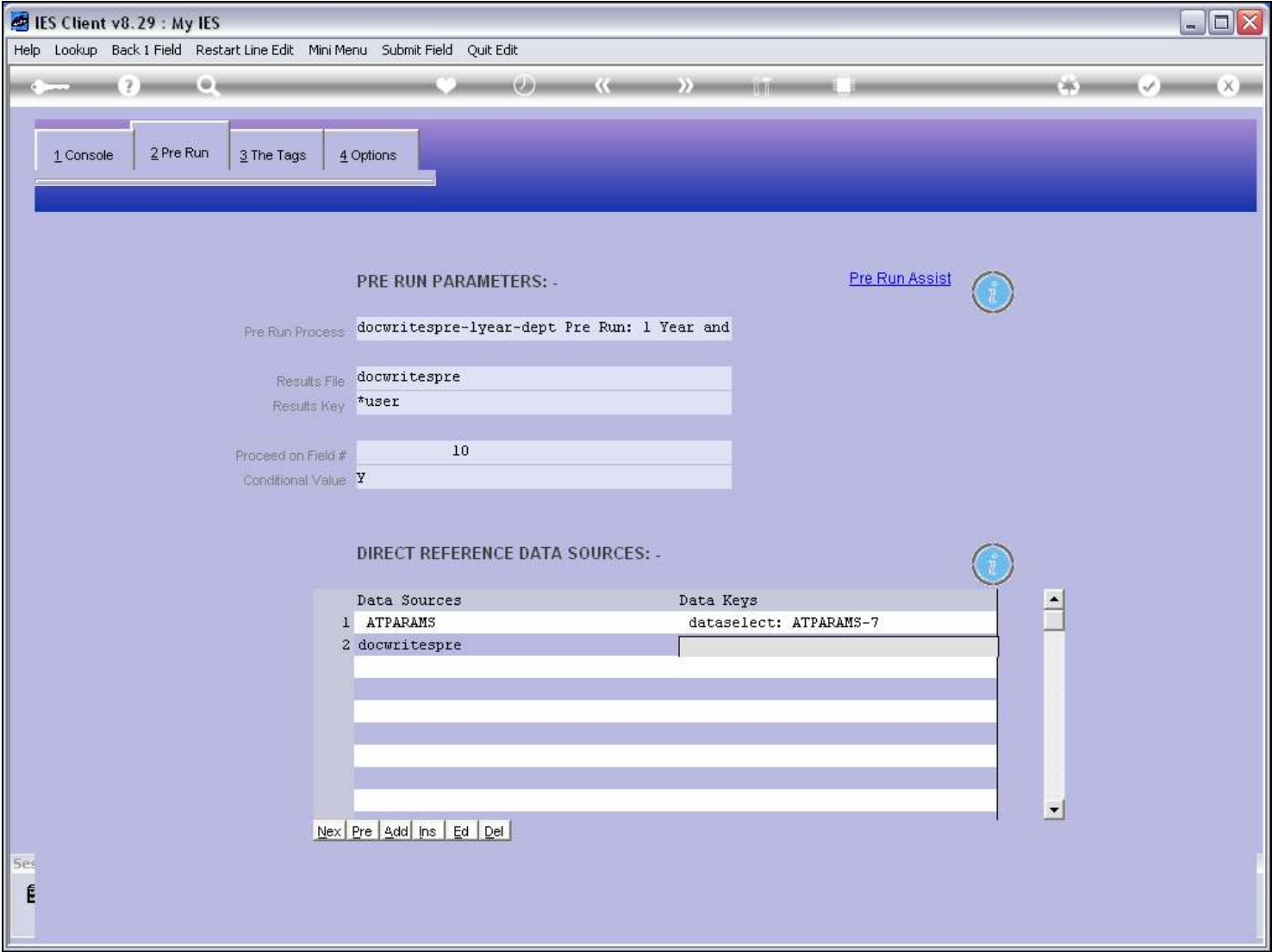
We can always specify a Data Source directly, if we know the Name. 'Docwritespre' is a commonly used Data Source, because most Pre Runs use it to pass Values to the Report Driver, and in some cases, the system also pre-formats a Data Record in this file, for use with the Report.

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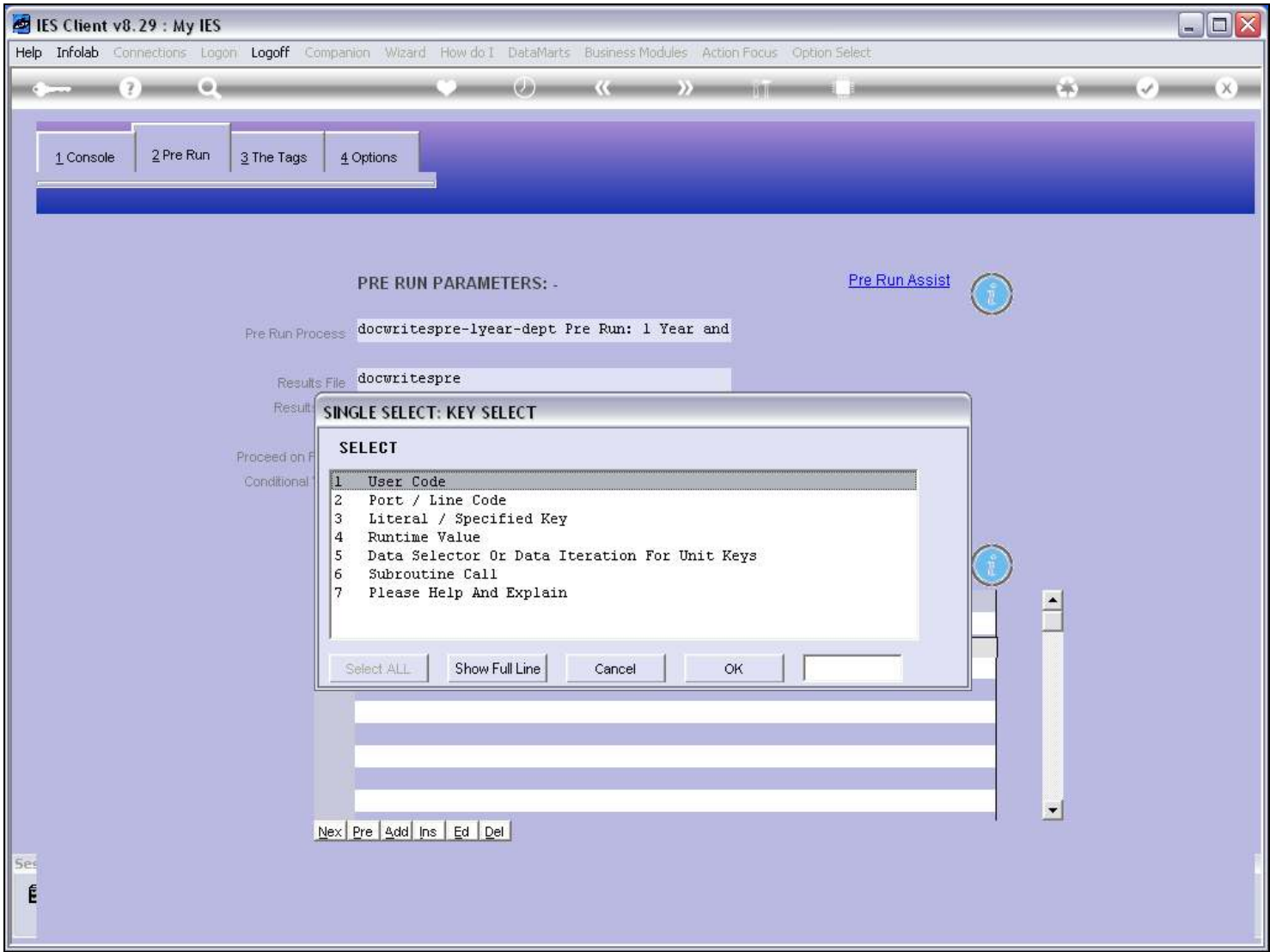
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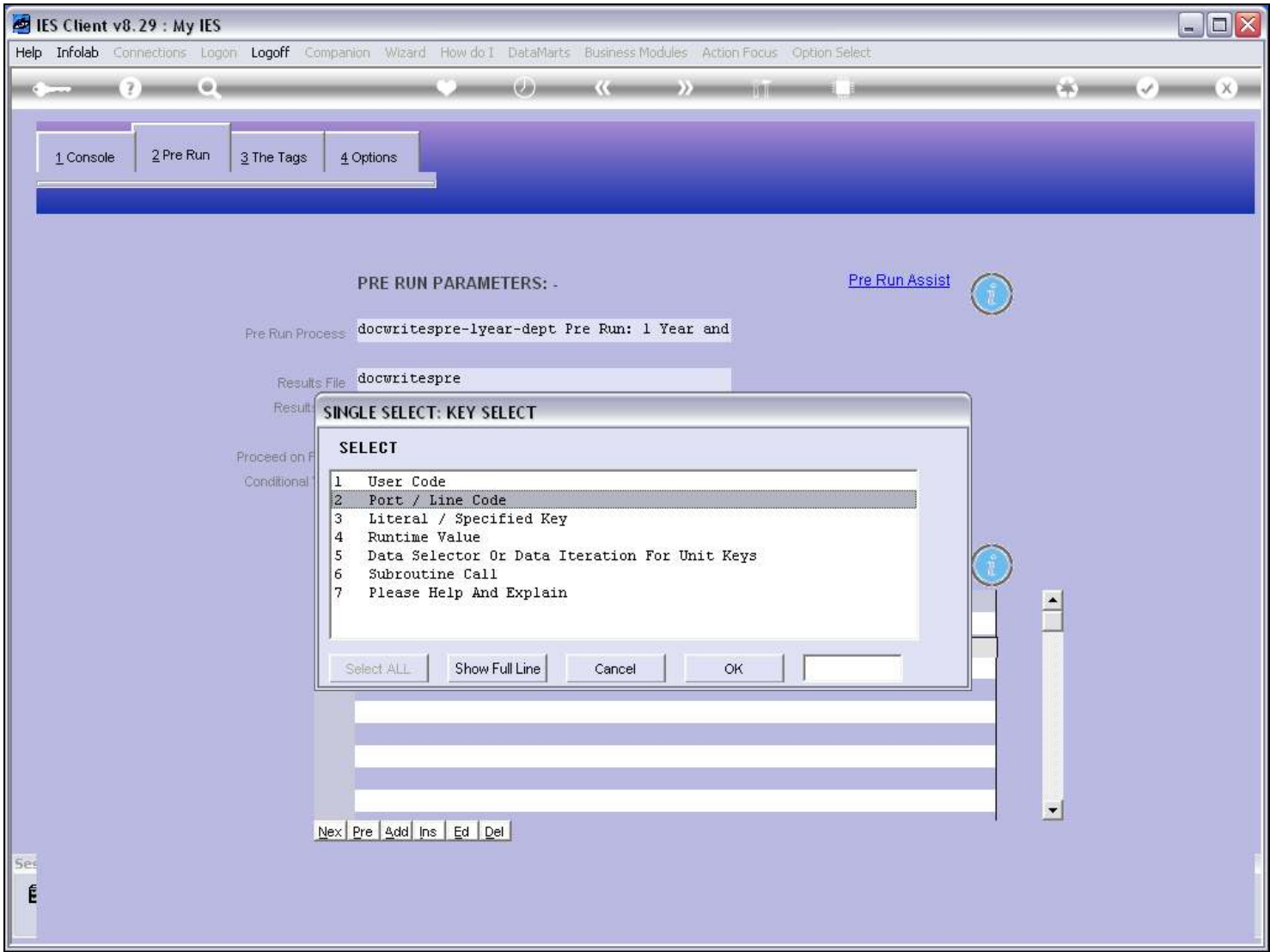
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**Slide 34 - Slide 34**

The screenshot shows the IES Client v8.29: My IES interface. The top menu bar includes Help, Lookup, Back 1 Field, Restart Line Edit, Mini Menu, Submit Field, and Quit Edit. Below the menu is a toolbar with icons for key, help, search, heart, clock, left arrow, right arrow, list, print, refresh, checkmark, and close. The main window has a tabbed interface with four tabs: 1 Console, 2 Pre Run (selected), 3 The Tags, and 4 Options.

**PRE RUN PARAMETERS: -**

[Pre Run Assist](#) 

Pre Run Process: docwritespre-lyear-dept Pre Run: 1 Year and


Results File: docwritespre

Results Key: \*user

Proceed on Field #: 10

Conditional Value: Y

**DIRECT REFERENCE DATA SOURCES: -**



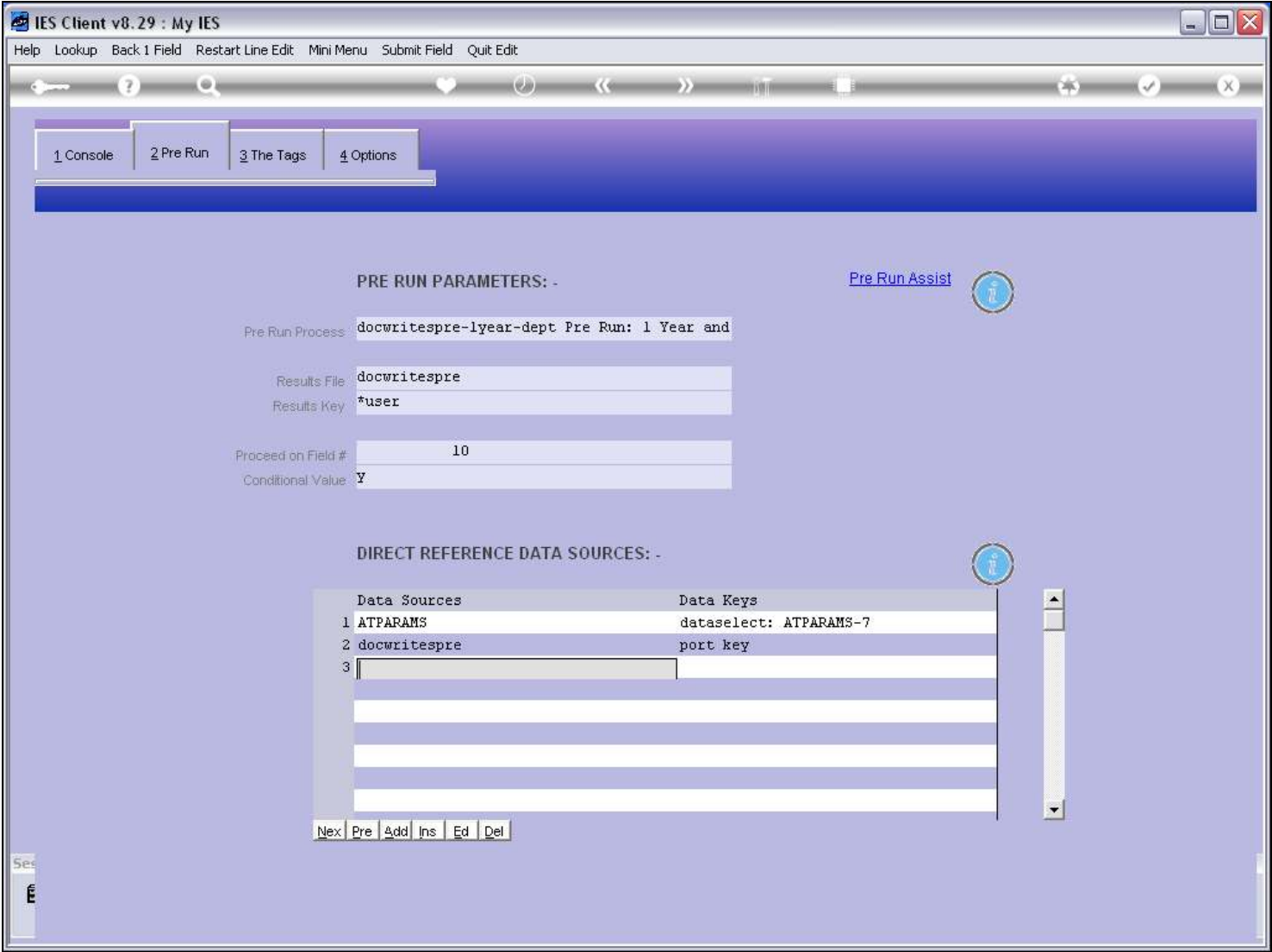
Data Sources	Data Keys
1 ATPARAMS	dataselect: ATPARAMS-7
2 docwritespre	*port

Nex Pre Add Ins Ed Del

**Slide notes**

Note, in this example, that the Pre Run is already using 'docwritespre' with the User Key, and most likely, if we use another record in this File for the Report, then it will be on the Port Key so that there is no clash.

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**Slide 36 - Slide 36**

The screenshot shows the IES Client v8.29: My IES interface. The top menu bar includes Help, Lookup, Back 1 Field, Restart Line Edit, Mini Menu, Submit Field, and Quit Edit. Below the menu is a toolbar with icons for key, help, search, heart, clock, left arrow, right arrow, list, print, refresh, checkmark, and close. The main window has a tabbed interface with four tabs: 1 Console, 2 Pre Run (selected), 3 The Tags, and 4 Options.

**PRE RUN PARAMETERS: -**

[Pre Run Assist](#) 

Pre Run Process: docwritespre-lyear-dept Pre Run: 1 Year and


Results File: docwritespre

Results Key: \*user

Proceed on Field #: 10

Conditional Value: Y

**DIRECT REFERENCE DATA SOURCES: -**



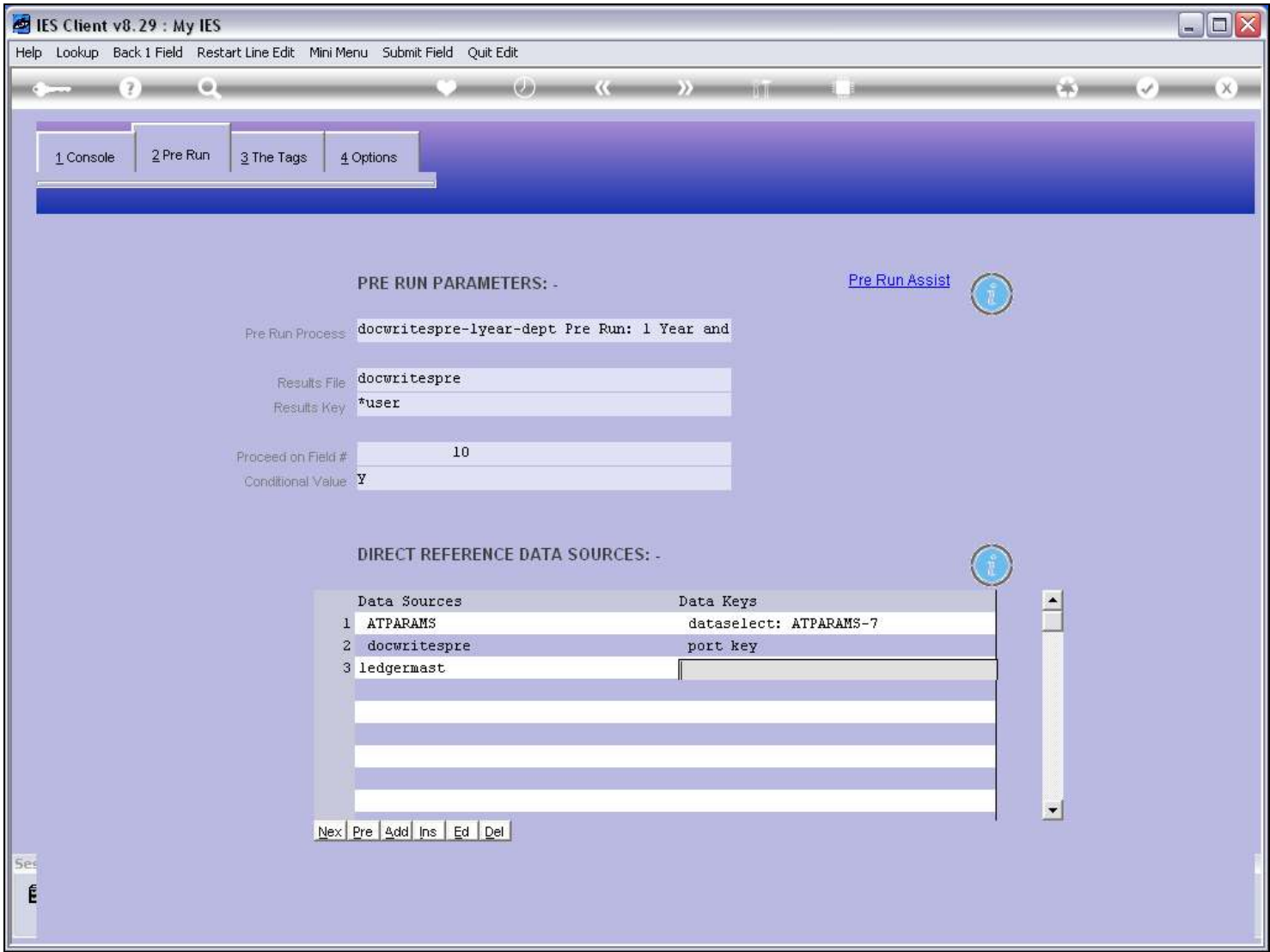
Data Sources	Data Keys
1 ATPARAMS	dataselect: ATPARAMS-7
2 docwritespre	port key
3 ledgermast	

Nex Pre Add Ins Ed Del

**Slide notes**

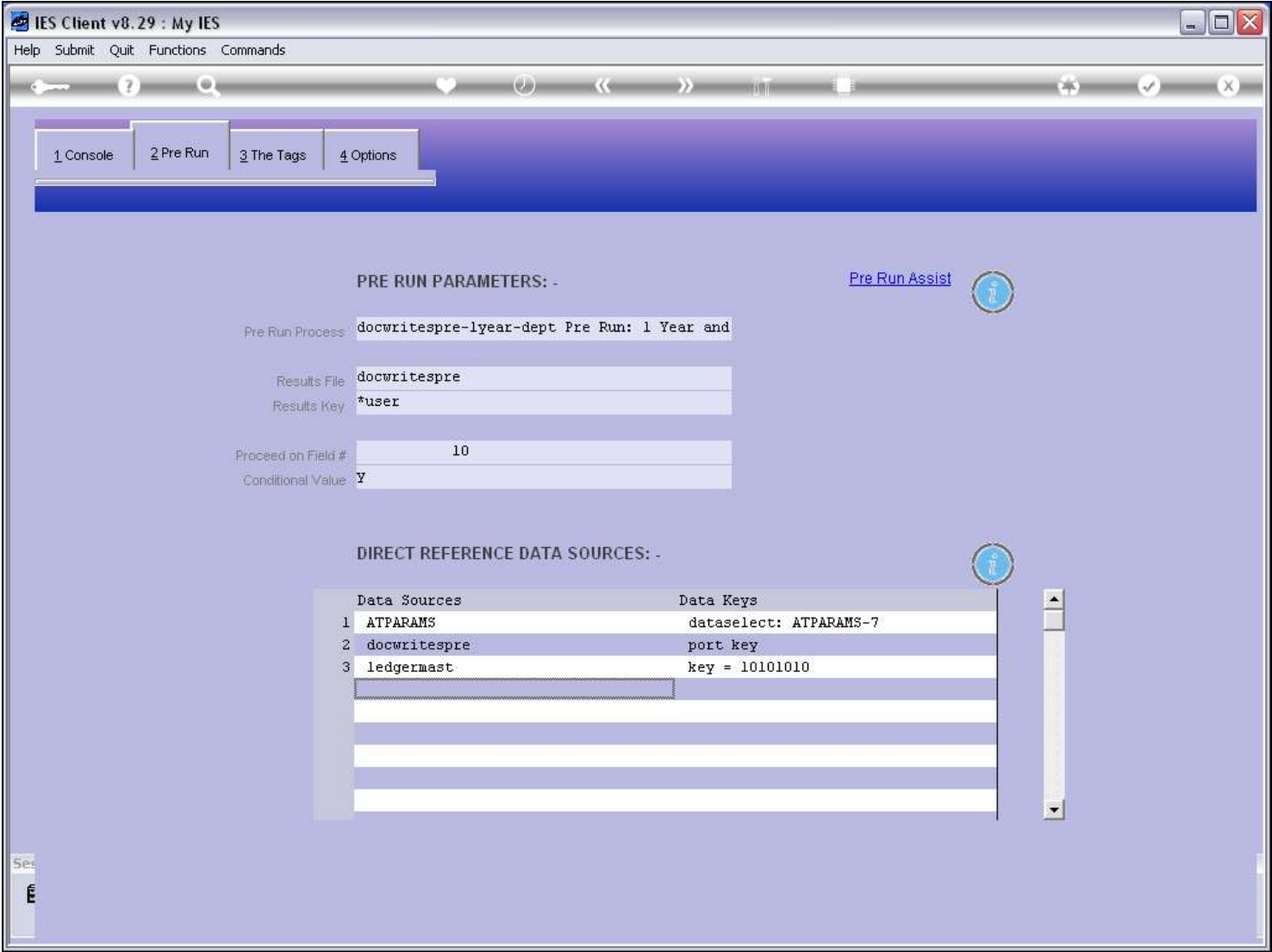
We can also specify a Key directly, and we can also retrieve the Key from a Value in the Pre Run record.

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