

Slide 1

Slide notes: We will now learn how we can gain access to the choices that the User has made when performing the Report, and how we can display that information in the Report. For this, we use the 'Data Selection Key' Tag Template.

Purchase Order Invoice Processing, Range Report.

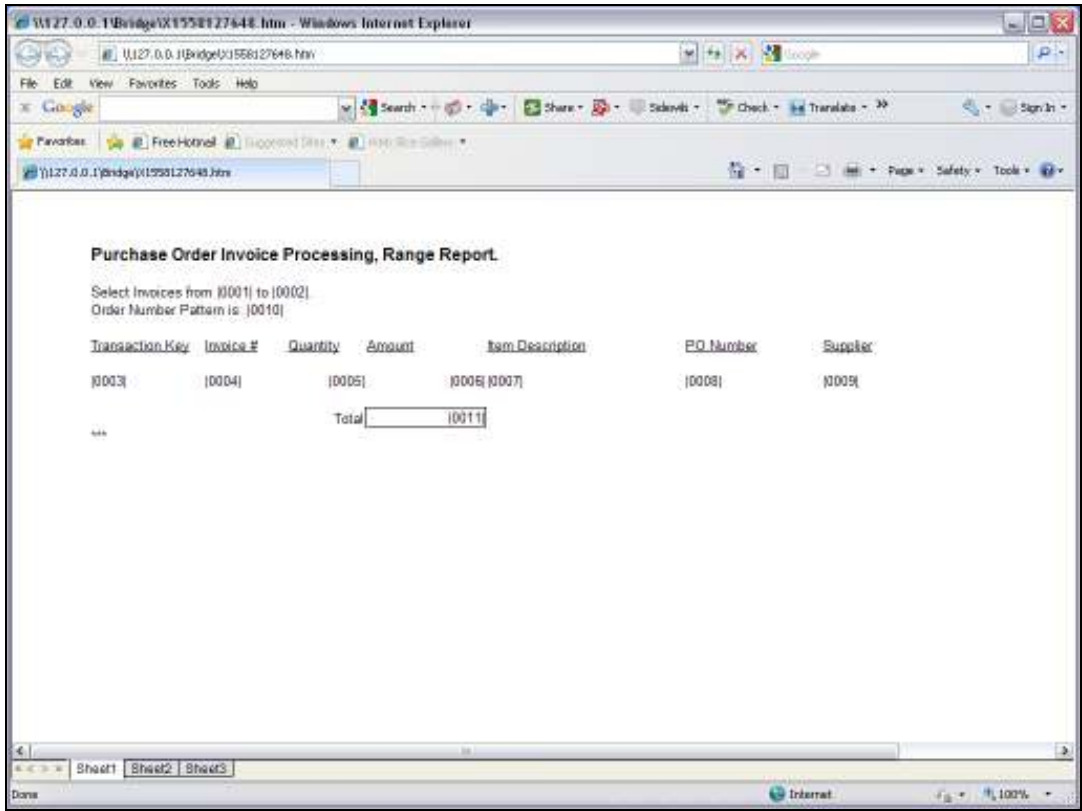
Select Invoices from {0001} to {0002}
Order Number Pattern is: {0010}

Transaction Key	Invoice #	Quantity	Amount	Item Description	PO Number	Supplier
{0003}	{0004}	{0005}		{0006} {0007}	{0008}	{0009}
		Total		{0011}		

Sheet1 Sheet2 Sheet3

Slide 2

Slide notes: Let us consider this layout. It performs a Unit that is based on a Transaction selection of Purchase Order Invoice processing.



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Slide 4

Slide notes:

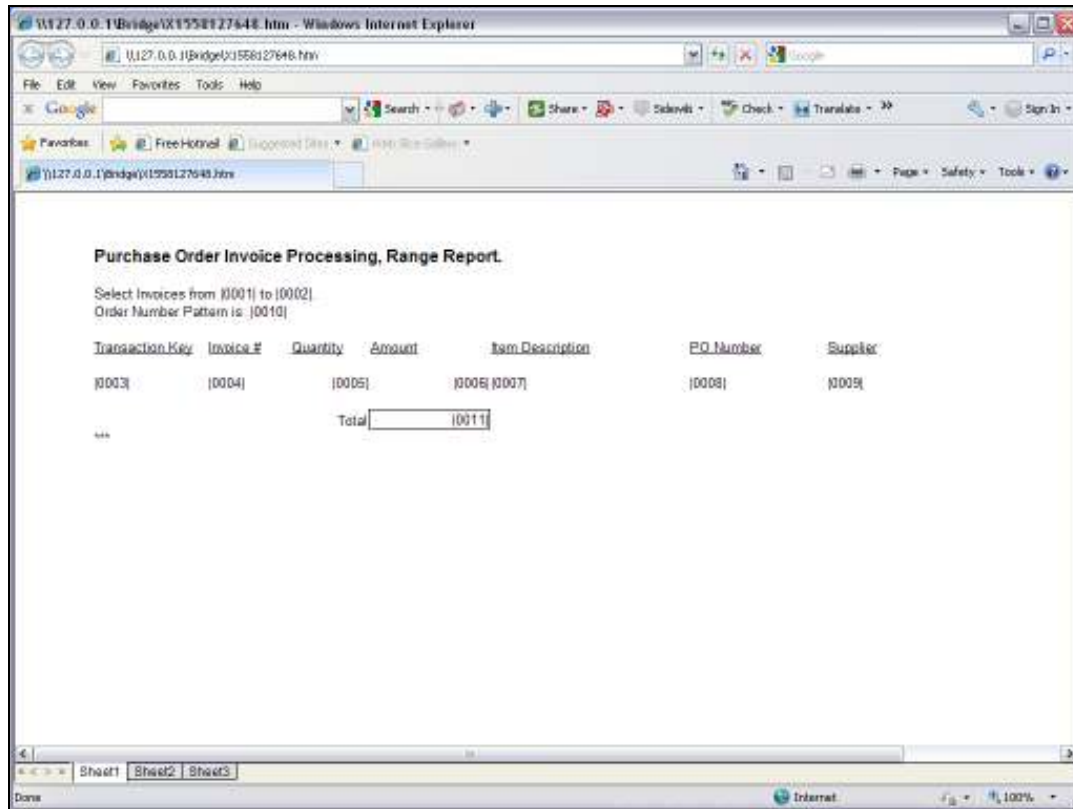
Purchase Order Invoice Processing, Range Report.

Select Invoices from {0001} to {0002}
Order Number Pattern is {0010}

Transaction Key	Invoice #	Quantity	Amount	Item Description	PO Number	Supplier
{0003}	{0004}	{0005}		{0006} {0007}	{0008}	{0009}
		Total	{0011}			

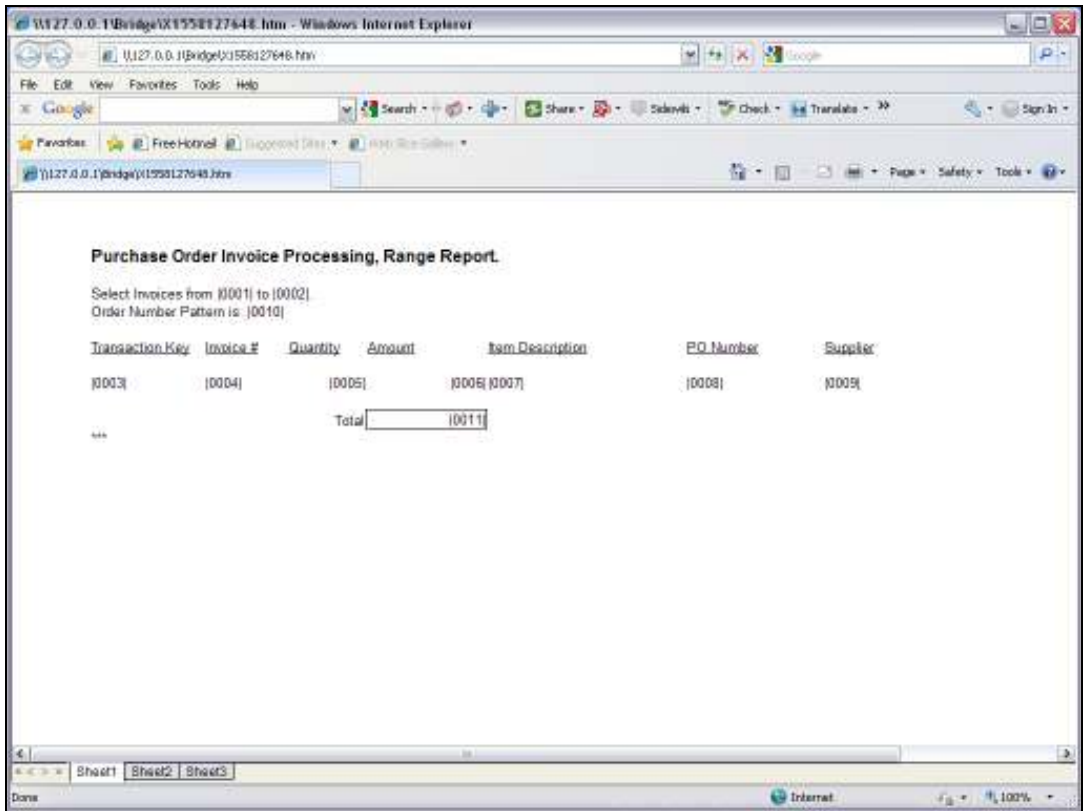
Slide 5

Slide notes: Each time the Report is performed, the User may make different selections with regards to Period and Transaction Ranges, and also Order Number pattern.



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Slide notes: That means that we cannot predict what the User will choose, but we still would like that information in the Report headers, because it tells us what the Report Result is supposed to include. So how can we get that information into the Report itself?



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Slide notes:



Slide 8

Slide notes: This is the Report, and we will now test it.



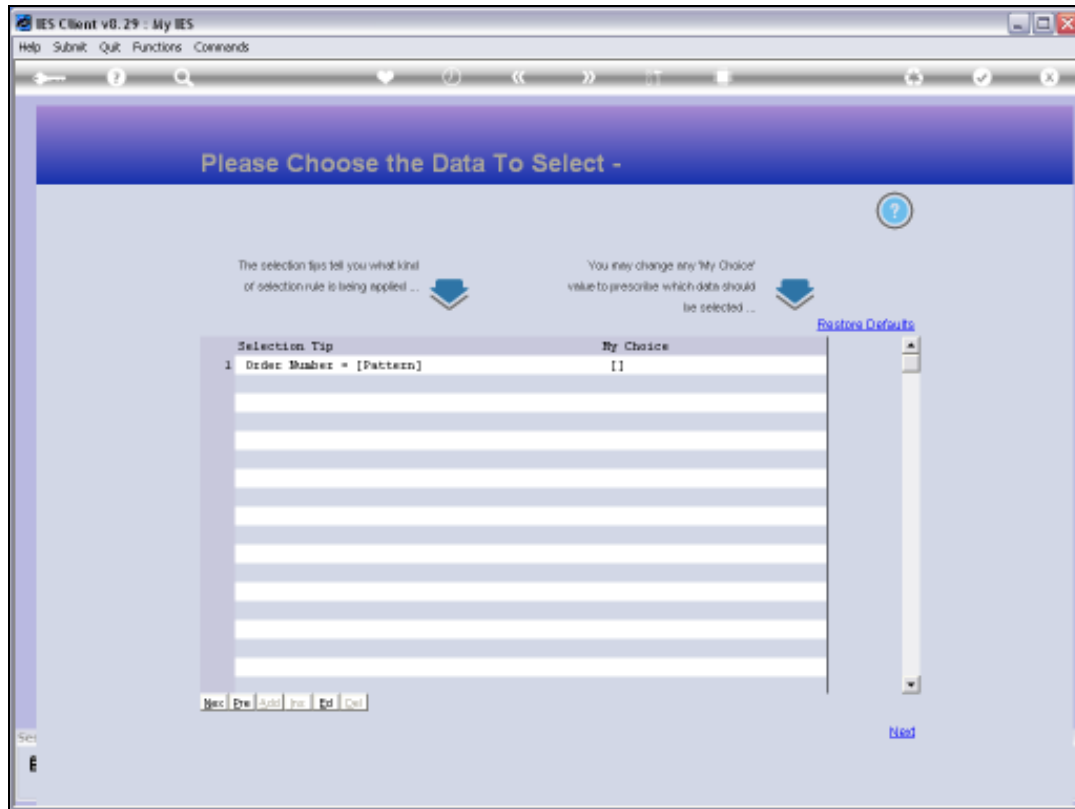
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Slide notes:



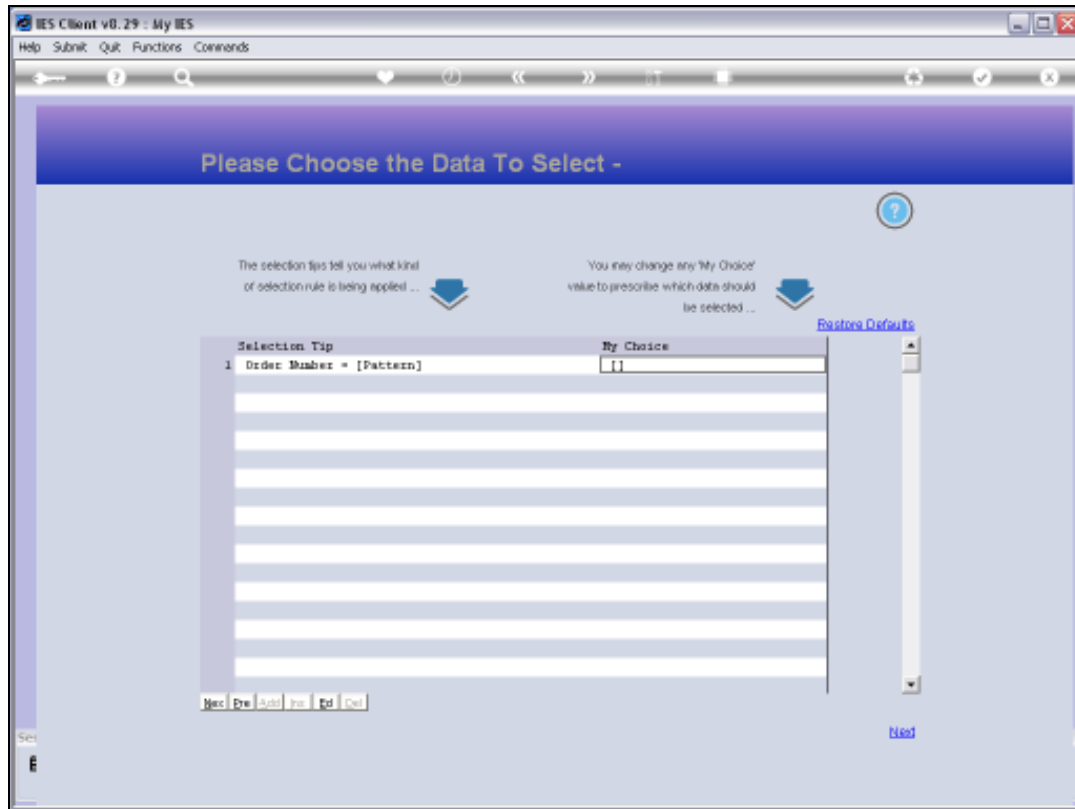
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Slide notes: When the Report is performed, this is the 1st of 2 Data Selection steps that pop up. And this is where the User chooses the Order Number pattern. Whatever choice the User makes here is remembered by DocWriter, as we will see.



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Slide notes:

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

Back Forward Search Home

Data Selection: -

This is a pre-selection of Data required for the current process. Please check the Help where necessary, before choosing NEXT ...

[Today](#)
[Yesterday](#)
[7 Days](#)
[14 Days](#)
[30 Days](#)
[Next](#)

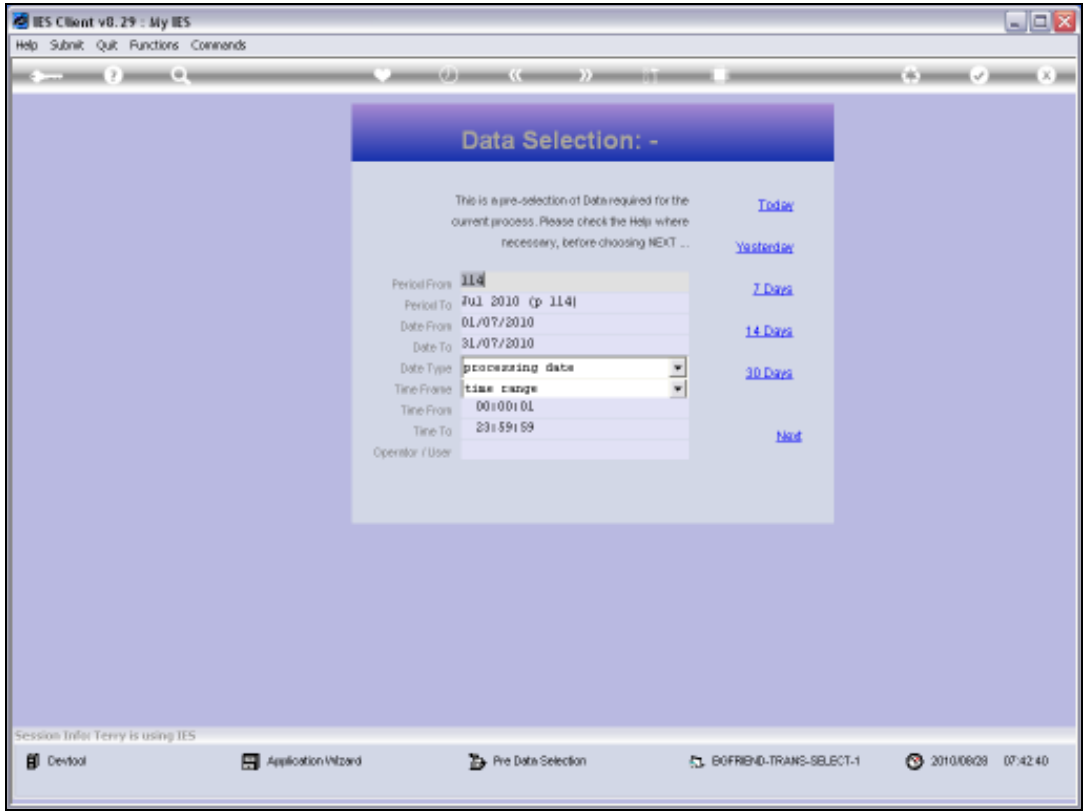
Period From: Jul 2010 (p 114)
Period To: Jul 2010 (p 114)
Date From: 01/07/2010
Date To: 31/07/2010
Date Type: processing date
Time Frame: time range
Time From: 00:00:01
Time To: 23:59:59
Operator / User:

Session Info: Terry is using IES

Devtool Application Wizard Pre Data Selection BOFRIND-TRANS-SELECT-1 2010/08/28 07:42:40

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Slide notes: This is the 2nd step of the Data Selection, and once again, the User is able to make different choices. Each choice the User makes is remembered.



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Slide notes:



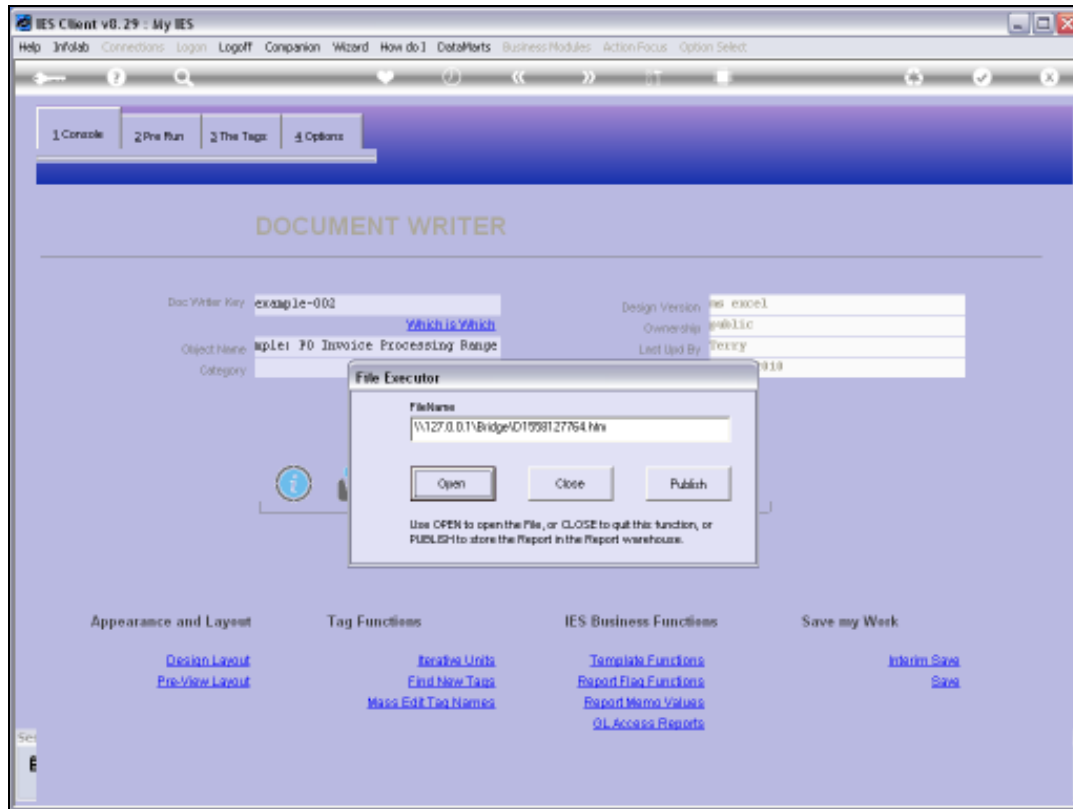
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Slide notes:



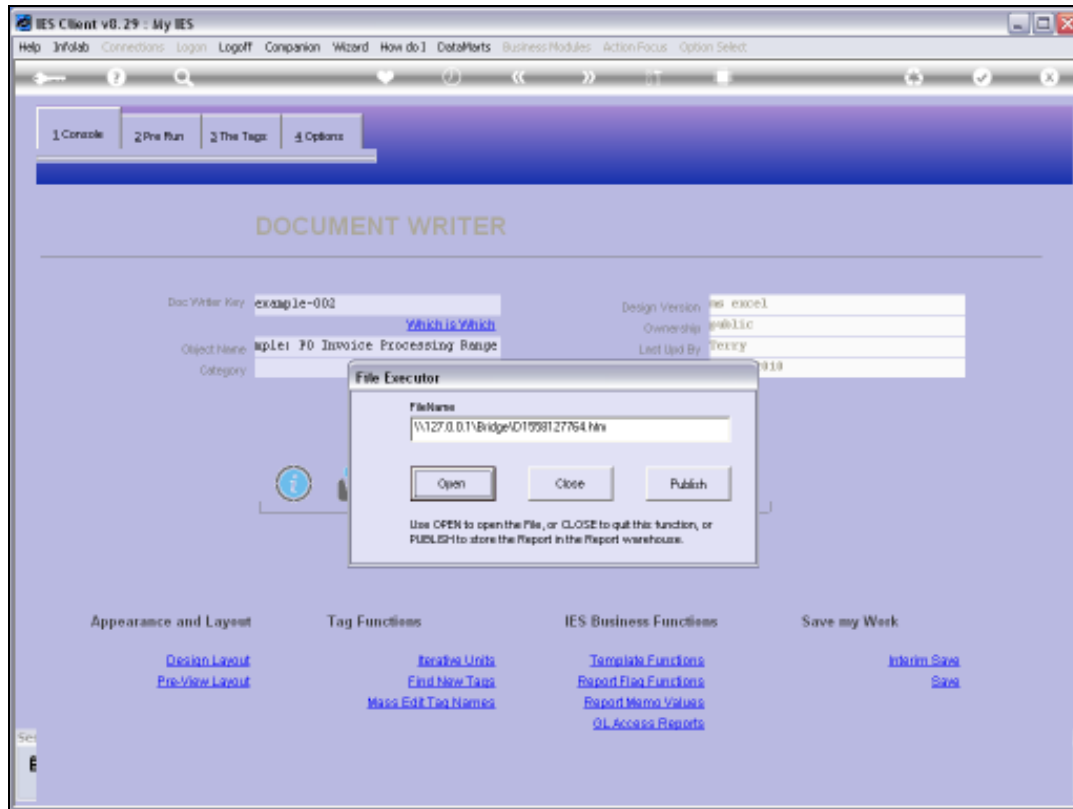
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Slide notes:



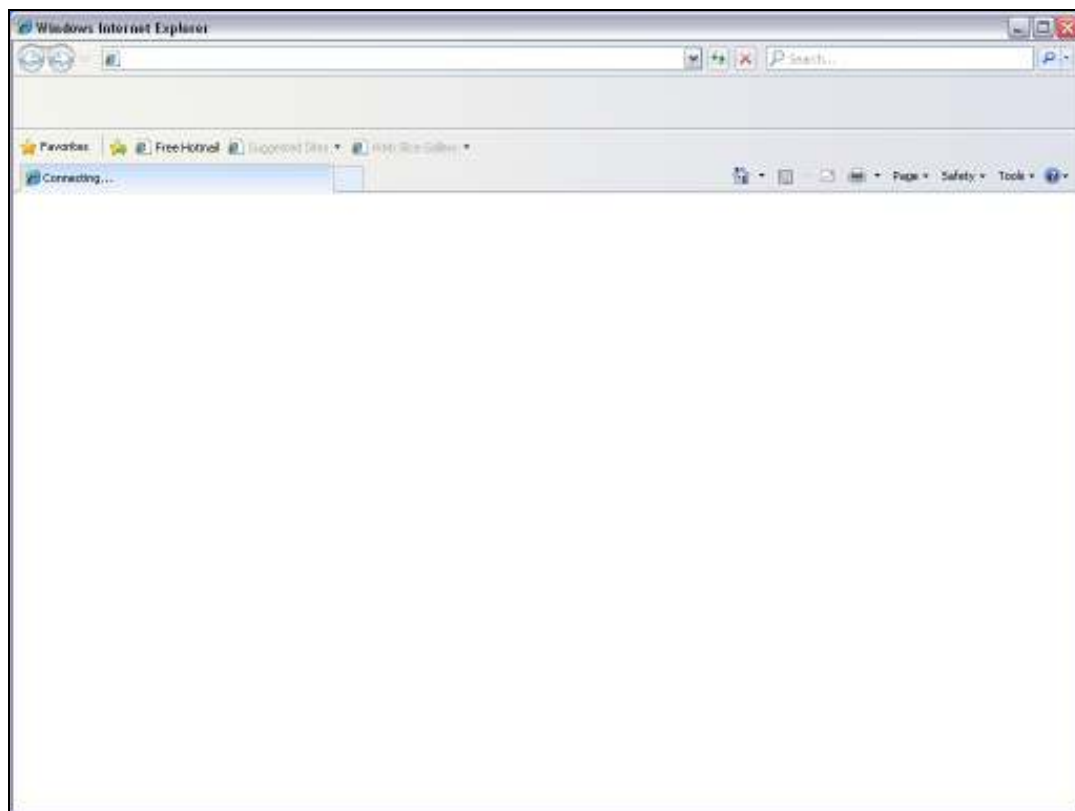
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Slide notes:



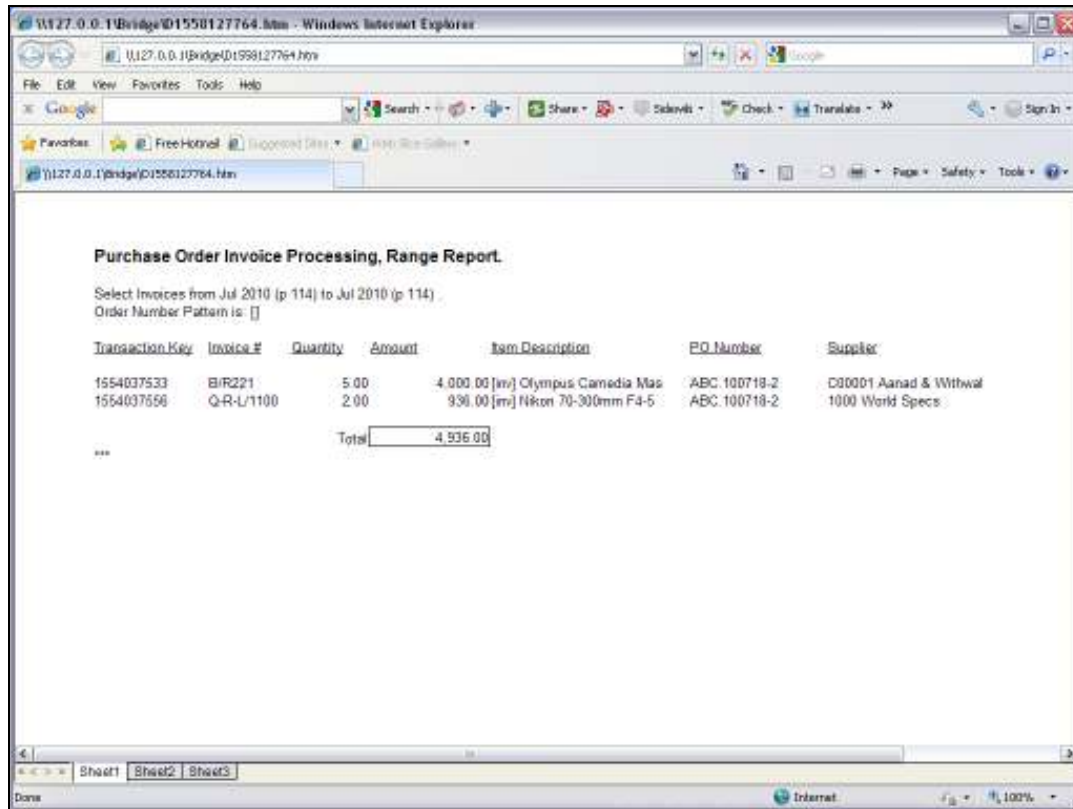
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Slide notes:

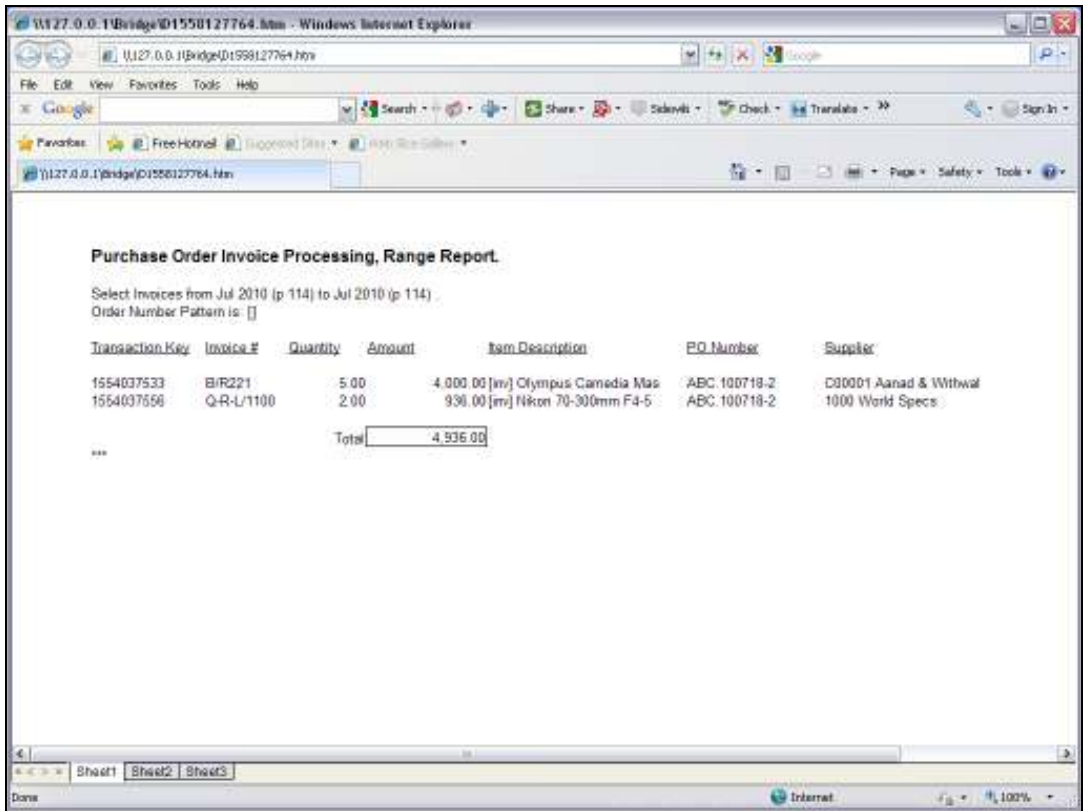


The screenshot shows a web browser window with the title 'U127.0.0.1BridgeID1550127764.htm - Windows Internet Explorer'. The address bar shows 'U127.0.0.1BridgeID1550127764.htm'. The browser has a menu bar (File, Edit, View, Favorites, Tools, Help) and a toolbar with various icons. Below the toolbar is a 'Favorites' bar with links like 'Free-Hotmail', 'Support Sites', and 'My Site Gallery'. The main content area displays a report titled 'Purchase Order Invoice Processing, Range Report.' with instructions: 'Select Invoices from Jul 2010 (p 114) to Jul 2010 (p 114)' and 'Order Number Pattern is: []'. A table follows with columns: Transaction Key, Invoice #, Quantity, Amount, Item Description, PO Number, and Supplier. The table contains two rows of data and a total row. The status bar at the bottom shows 'Done' and 'Internet'.

Transaction Key	Invoice #	Quantity	Amount	Item Description	PO Number	Supplier
1554037533	B/R221	5.00	4,000.00	[inv] Olympus Camera Mas	ABC 100718-2	C00001 Aanad & Withwal
1554037556	Q-R-L/1100	2.00	936.00	[inv] Nikon 70-300mm F4-5	ABC 100718-2	1000 World Specs
		Total	4,936.00			

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Slide notes: And we are able to show those choices made by the User, in the Report.

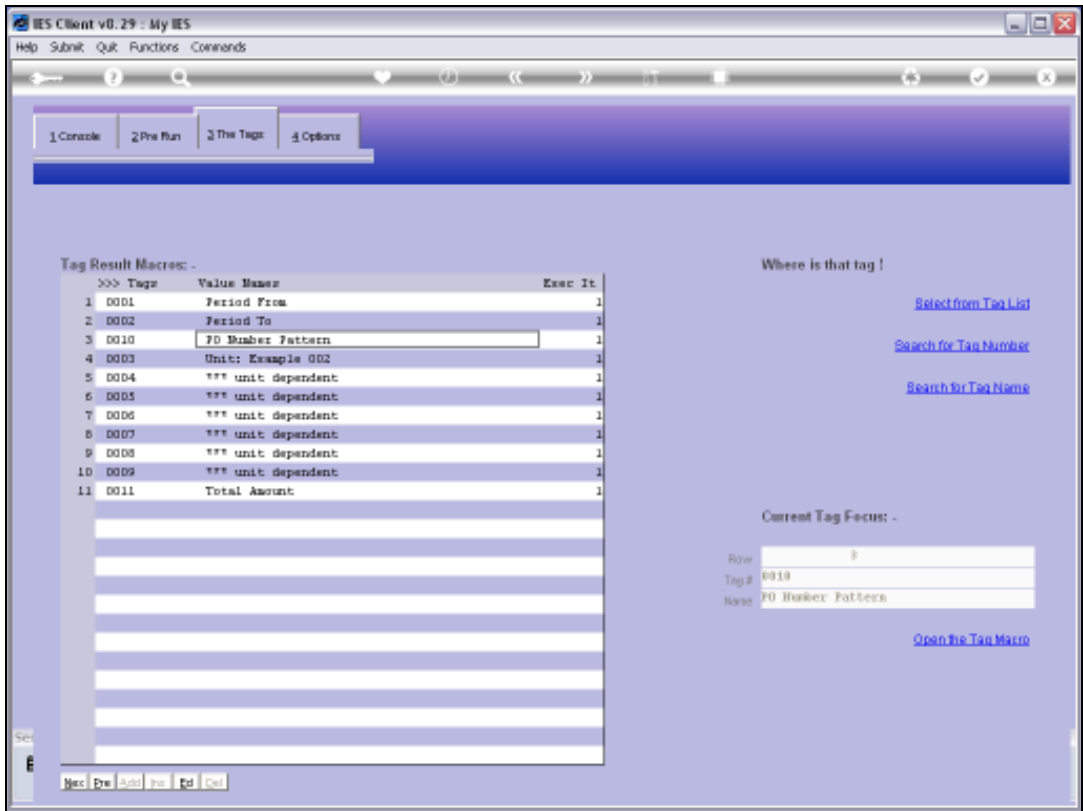


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Slide notes:

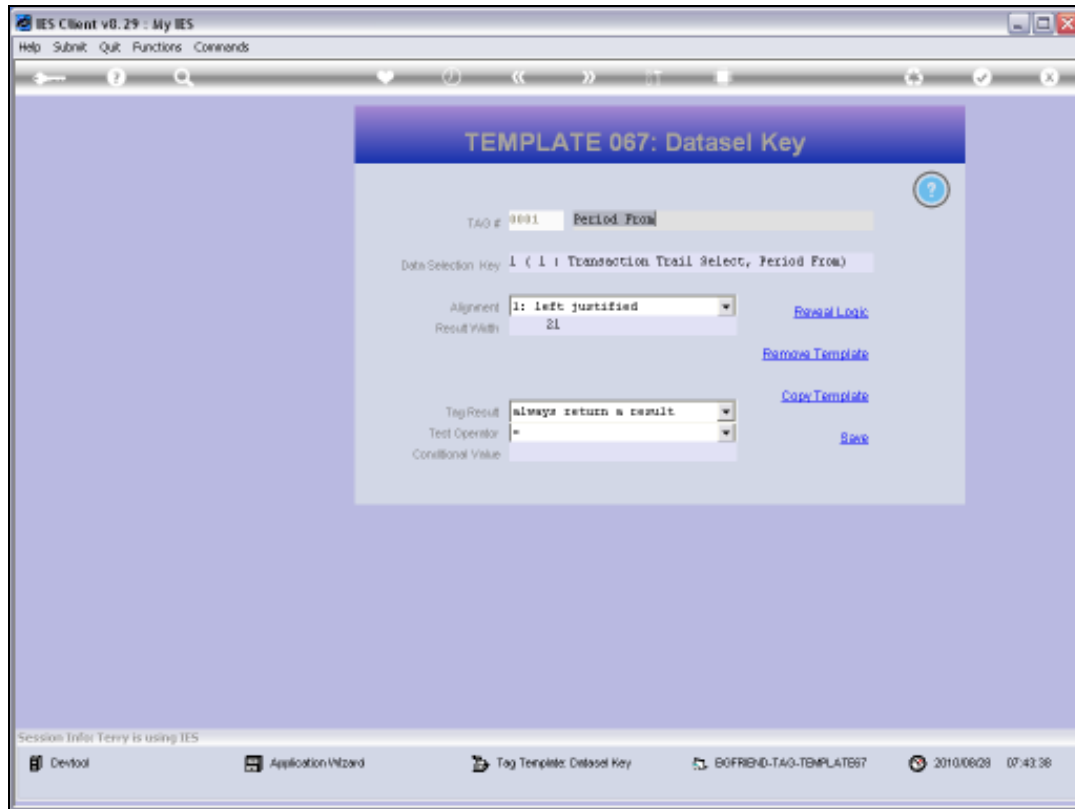


Slide 23
Slide notes: So let's see how we do that.



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Slide notes: The 'Period From' is one of the choices made by the User, and we can reveal it on the Report by using the 'Dataset Key' Template.



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Slide notes:



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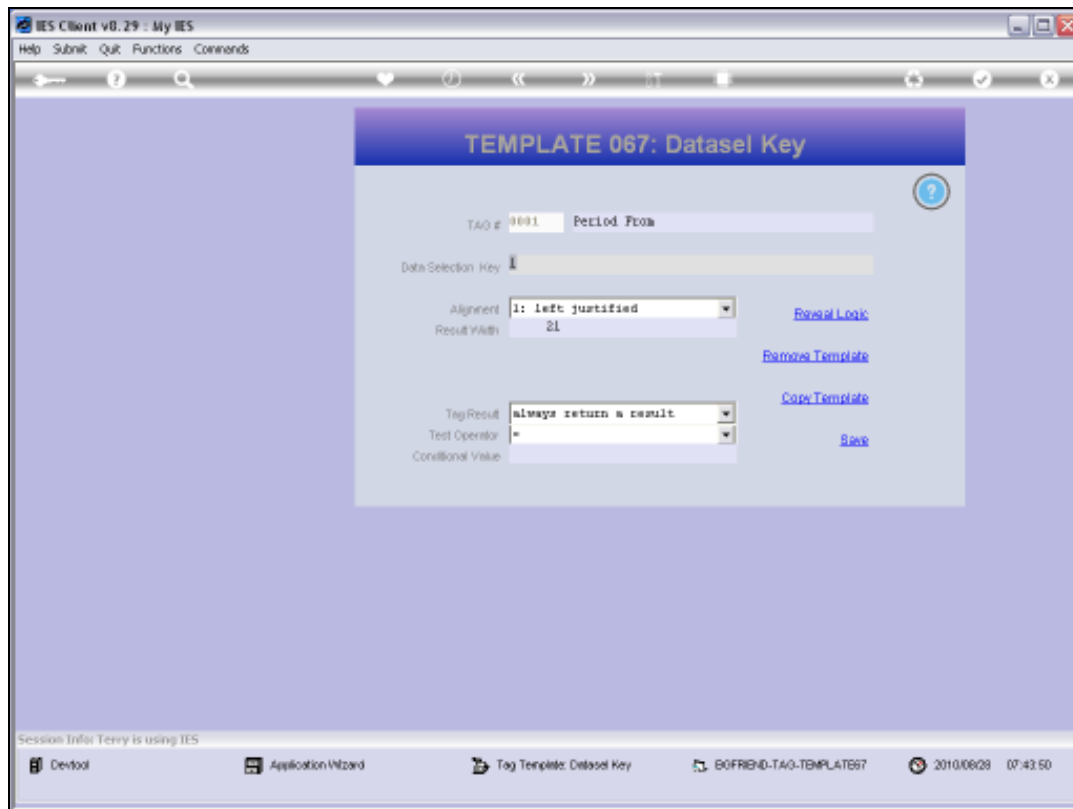
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Slide notes:



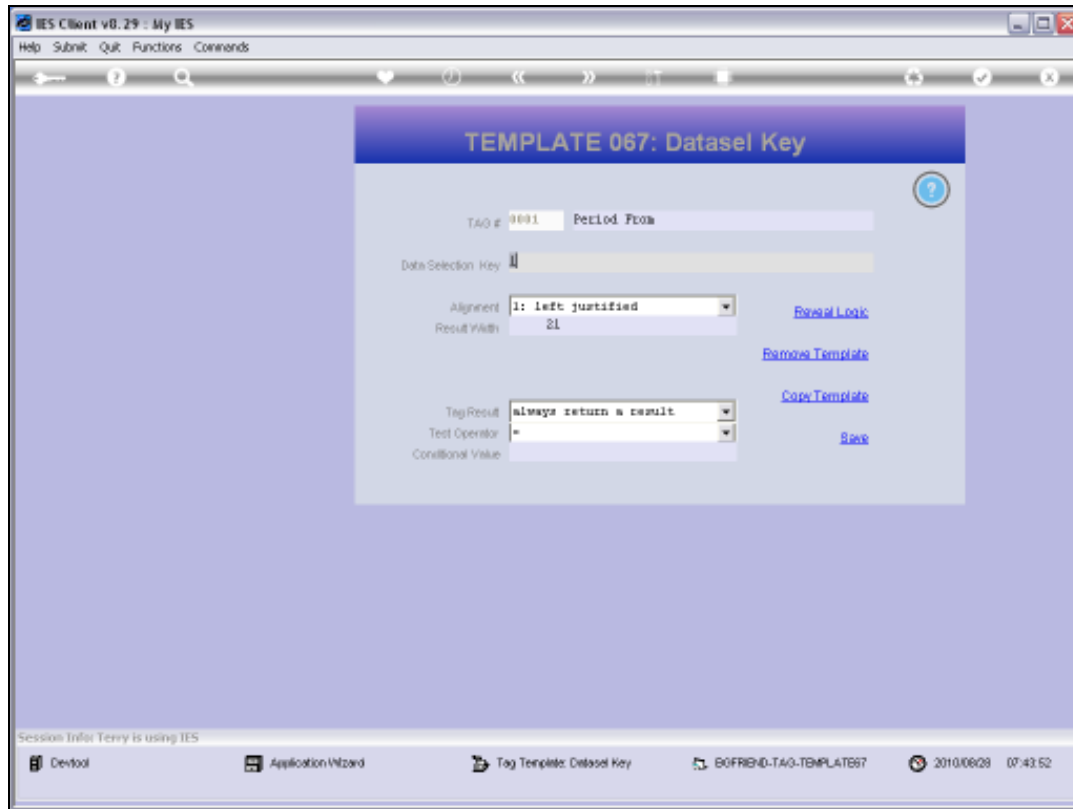
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Slide notes:



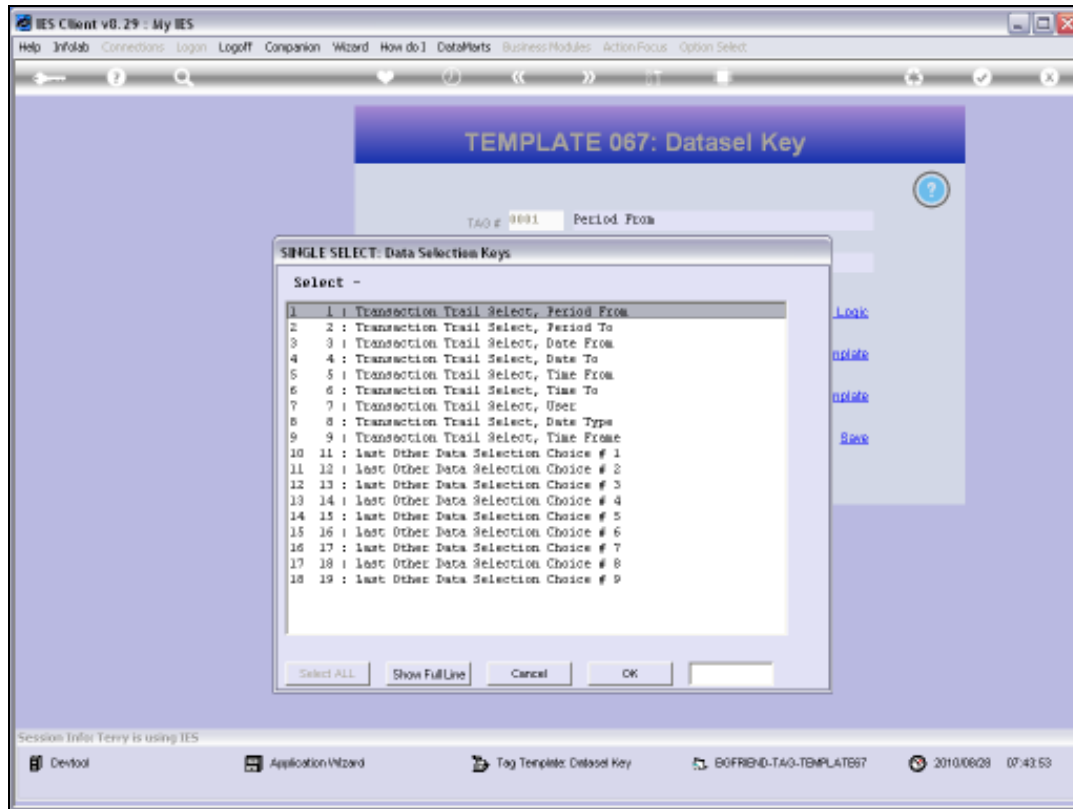
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Slide notes: DocWriter remembers the 9 primary choices on a Transaction select, and the most recent 9 choices on any other select. We can just choose which option we want at the current Tag.

The screenshot shows the IES Client v8.29 interface. The main window is titled 'TEMPLATE 067: Dataset Key'. It contains the following fields and controls:

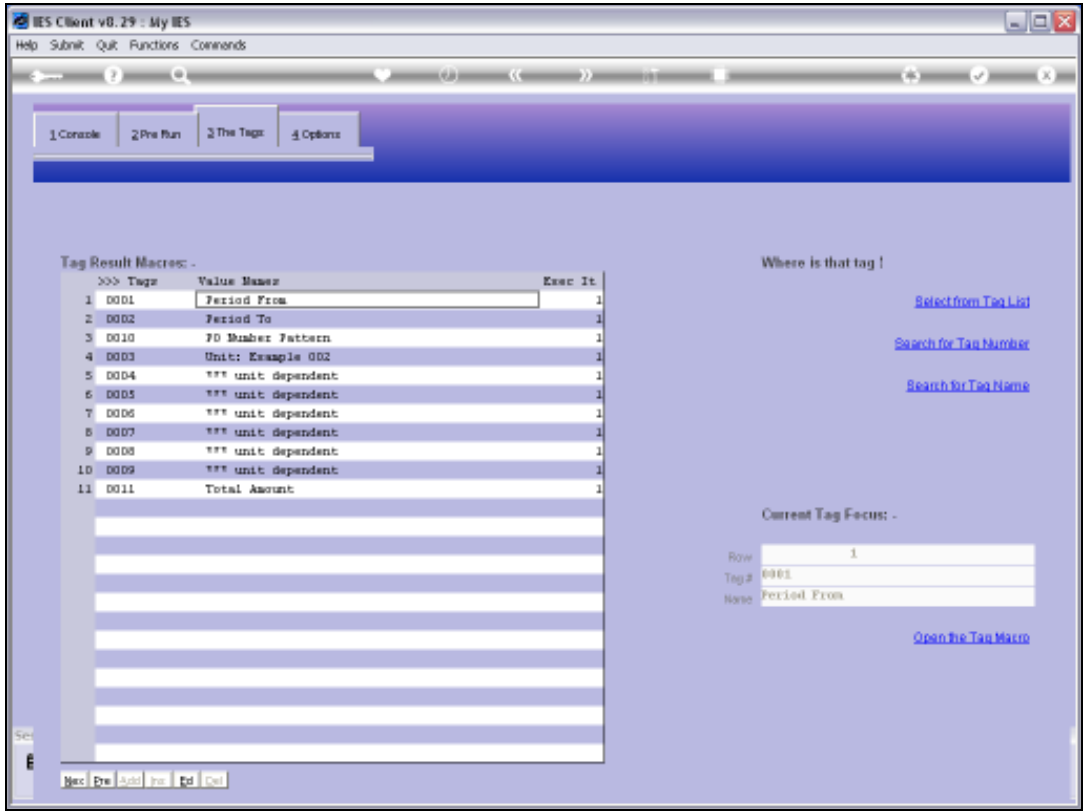
- TAQ #**: 0091
- Period From**: (empty text field)
- Data Selection Key**: [(| | Transaction Trail Select, Period From)]
- Alignment**: 1: left justified (dropdown menu)
- Result Width**: 21 (text field)
- Tag Result**: always return a result (dropdown menu)
- Test Operator**: = (dropdown menu)
- Conditional Value**: (empty text field)

On the right side of the form, there are three links: [Reset Logic](#), [Remove Template](#), and [Copy Template](#). At the bottom right, there is a [Save](#) button.

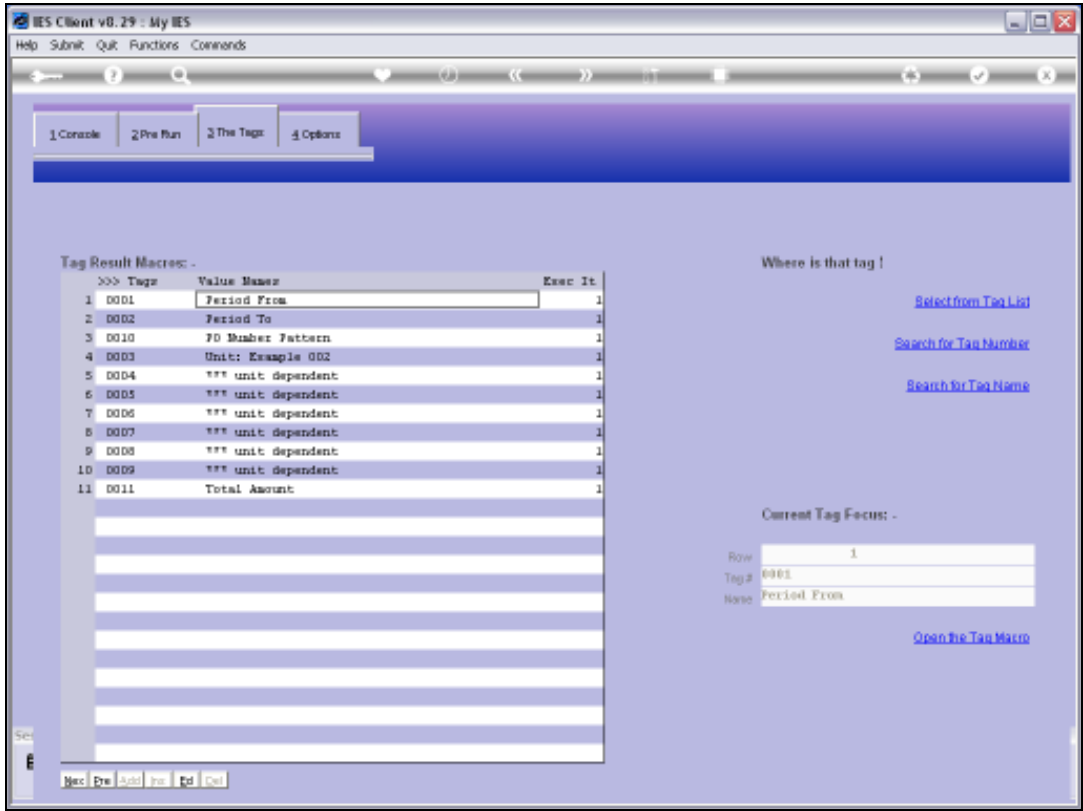
The status bar at the bottom of the window displays: 'Session Info: Terry is using IES', 'Devtool', 'Application Wizard', 'Tag Template: Dataset Key', 'BOFRID-TAQ-TEMPLATE67', '2010/09/28', and '07:44:01'.

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Slide notes:



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Slide notes:



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Slide notes: The same applies for the 'Period To' and the 'PO Number Pattern' Tags.

The screenshot shows the IES Client v8.29 interface. The main window is titled 'TEMPLATE 067: Dataset Key'. It contains the following fields and controls:

- TAQ #**: 0002
- Period To**: (text input field)
- Data Selection Key**: 2 (2 : Transaction Trail Select, Period To)
- Alignment**: 1: left justified
- Result Width**: 21
- Tag Result**: always return a result
- Test Operator**: =
- Conditional Value**: (text input field)

On the right side of the form, there are three links: [Reset Logic](#), [Remove Template](#), and [Copy Template](#). At the bottom right, there is a [Save](#) button.

The status bar at the bottom of the window displays the following information:

- Session Info: Terry is using IES
- Desktop
- Application Wizard
- Tag Template: Dataset Key
- BOFRID-TAQ-TEMPLATE67
- 2010/09/28 07:44:06

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Slide notes:

The screenshot shows the IES Client v8.29 interface. The main window is titled 'TEMPLATE 067: Dataset Key'. It contains the following fields and controls:

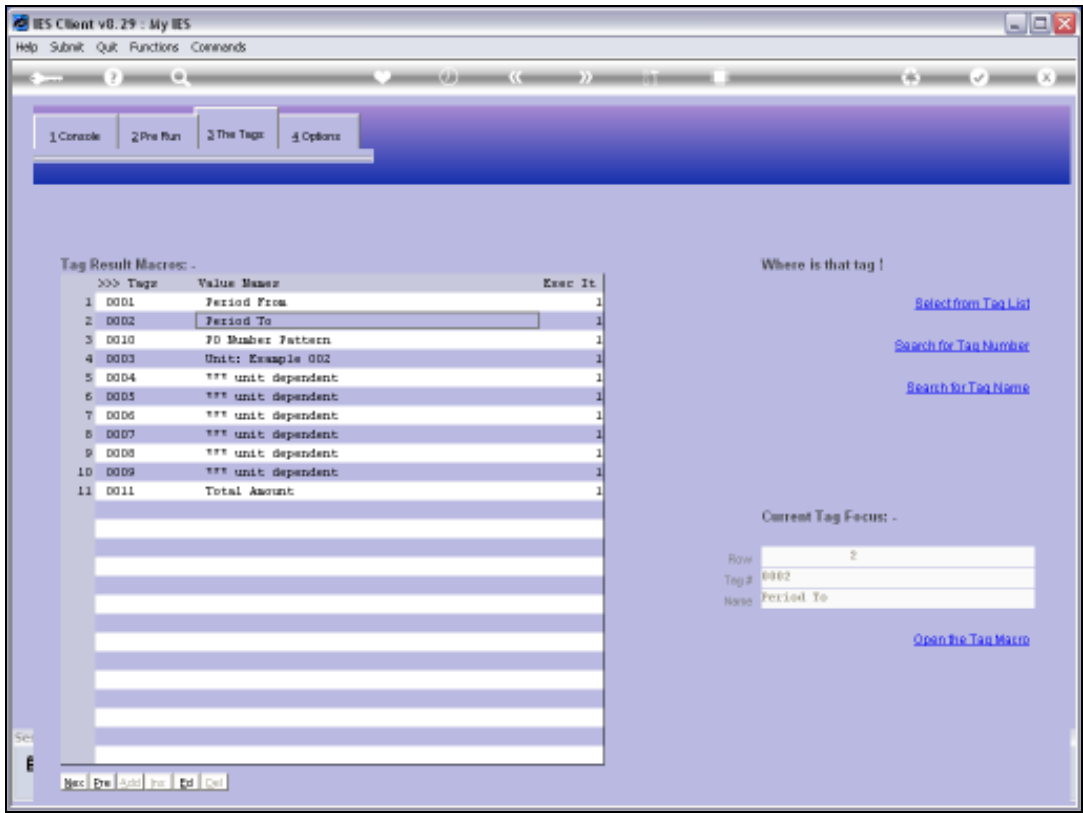
- TAQ #**: 0002
- Period To**: (text input field)
- Data Selection Key**: 2 (2 : Transaction Trail Select, Period To)
- Alignment**: 1: left justified (dropdown menu)
- Result Width**: 21 (text input field)
- Tag Result**: always return a result (dropdown menu)
- Test Operator**: = (dropdown menu)
- Conditional Value**: (text input field)

On the right side of the form, there are three links: [Reset Logic](#), [Remove Template](#), and [Copy Template](#). At the bottom right, there is a [Save](#) button.

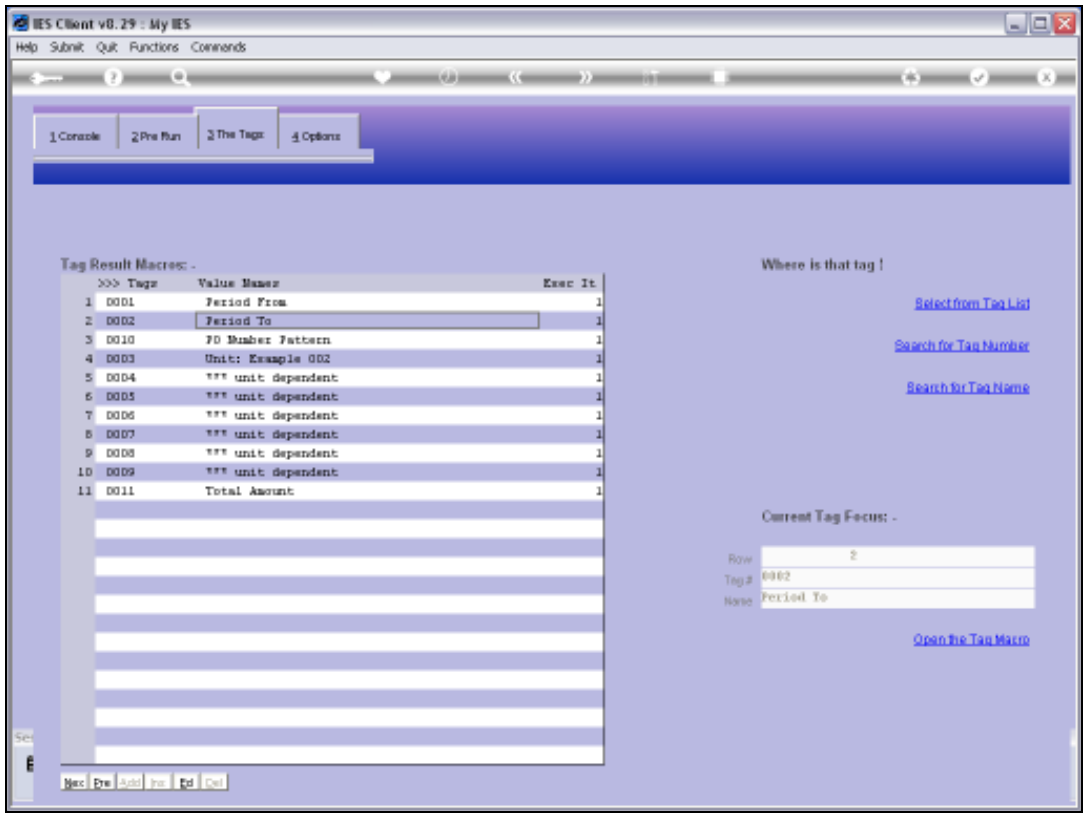
The status bar at the bottom of the window displays: 'Session Info: Terry is using IES'. The taskbar at the very bottom shows icons for 'Devtool', 'Application Wizard', 'Tag Template: Dataset Key', and 'BOFRID-TAQ-TEMPLATE67', along with the date '2010/09/28' and time '07:44:07'.

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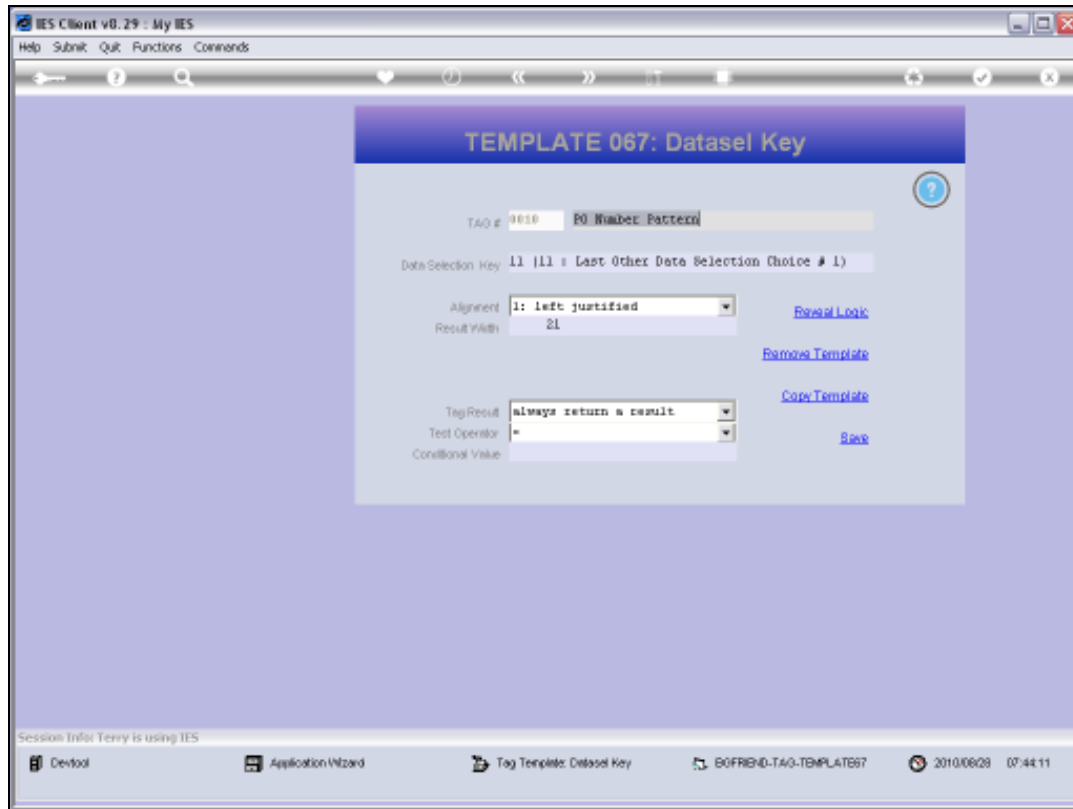
Slide notes:



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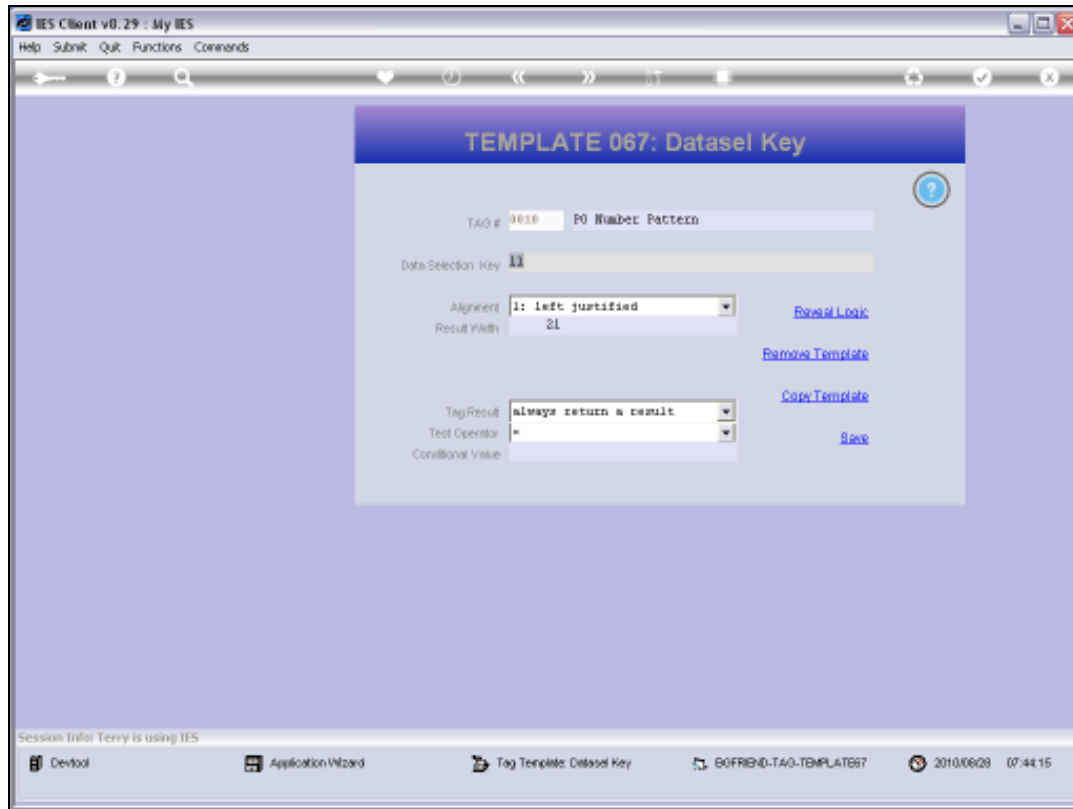
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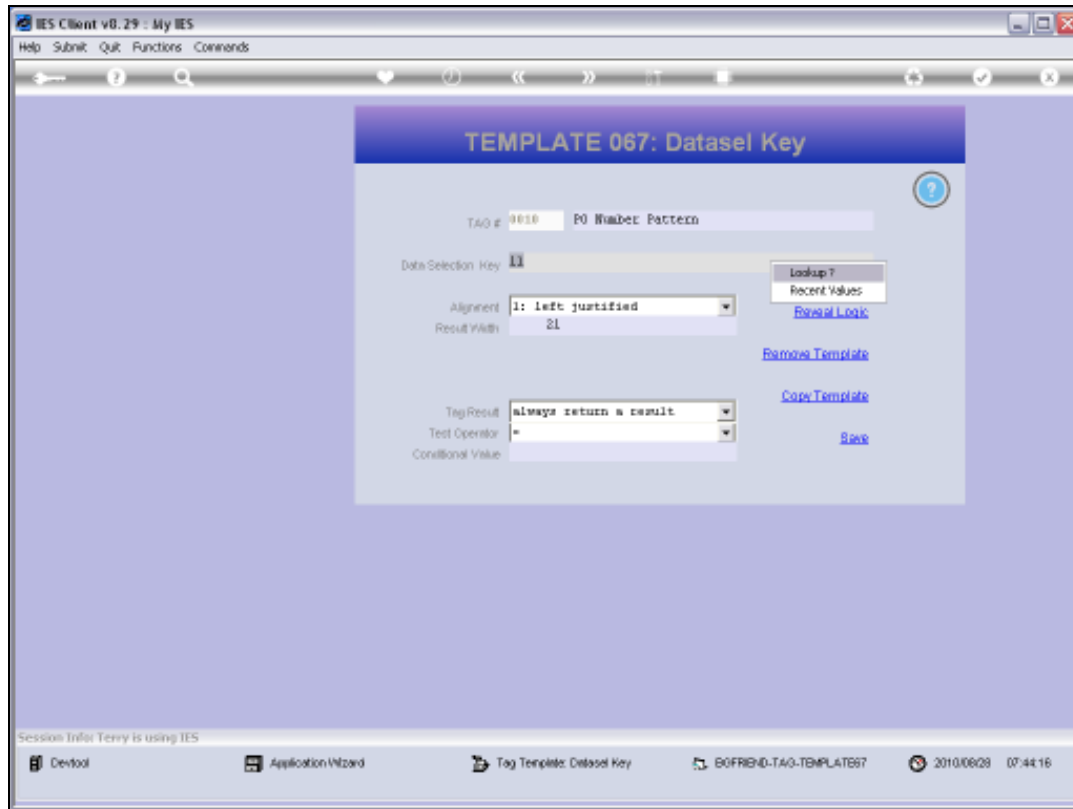
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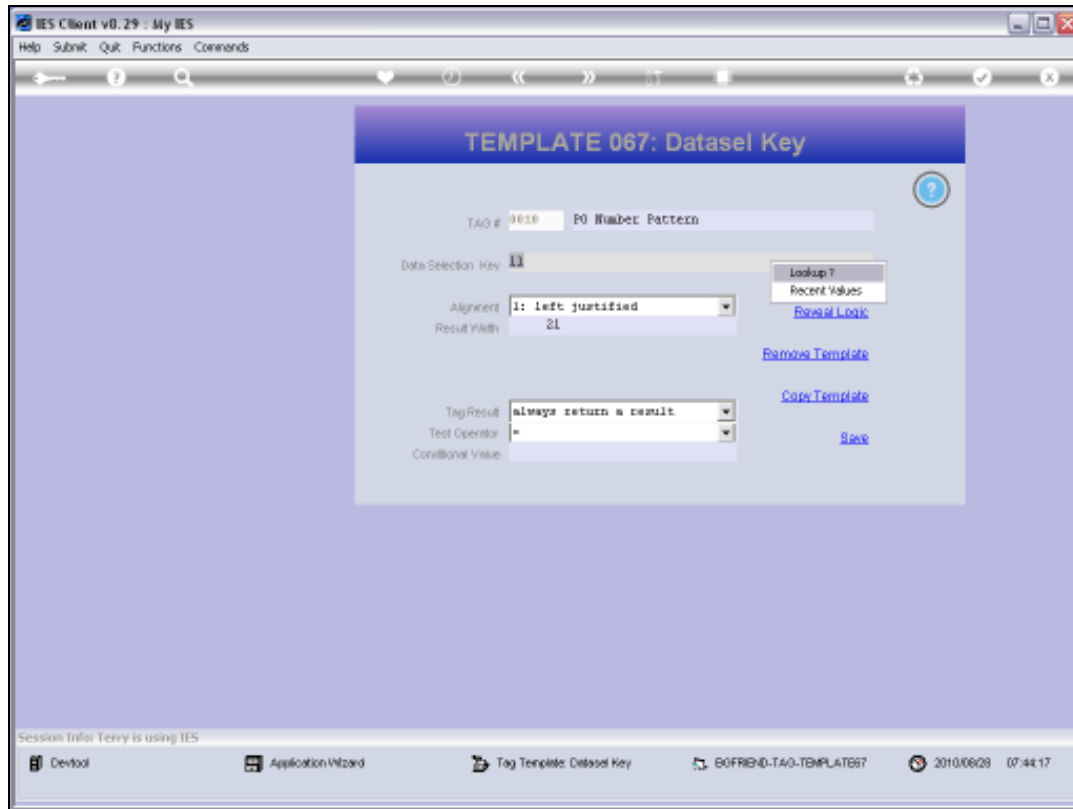
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Slide notes:



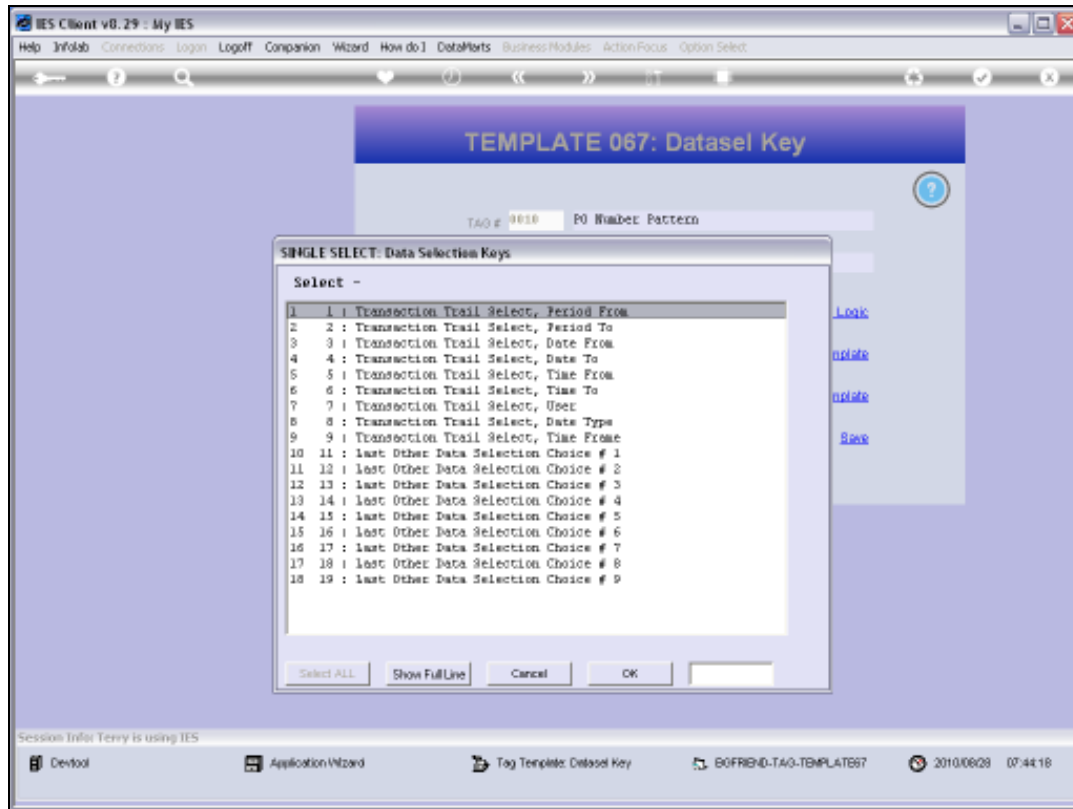
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Slide notes:



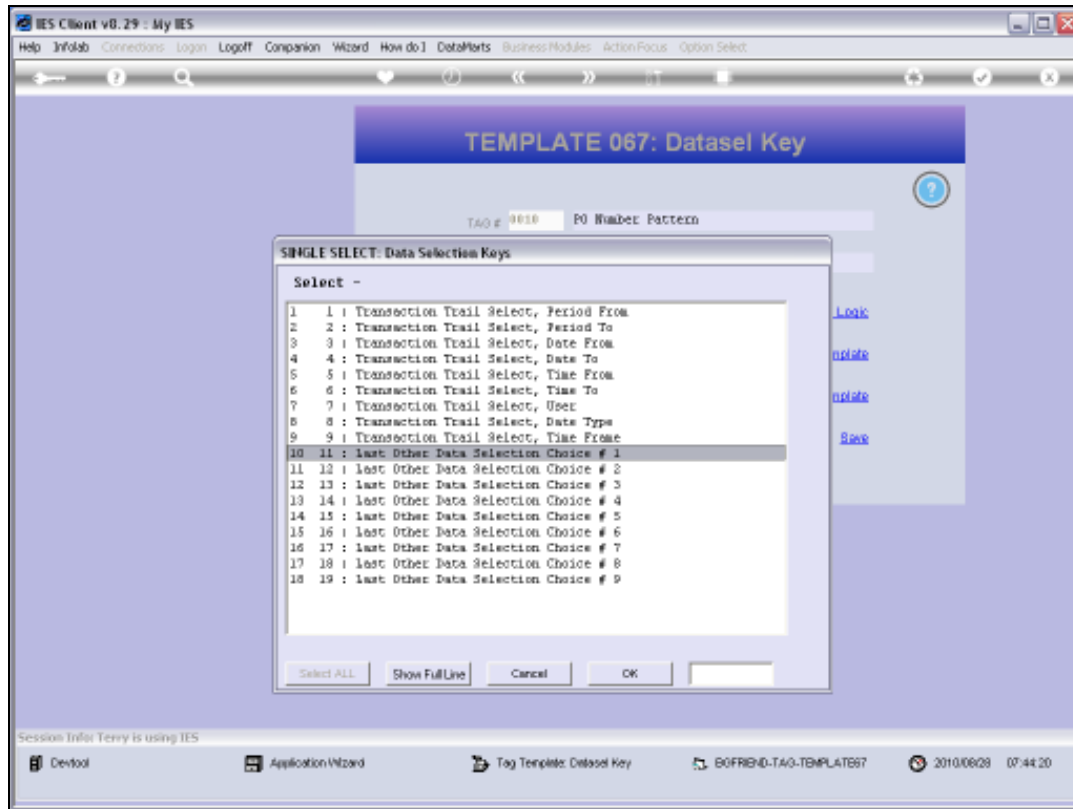
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Slide notes:



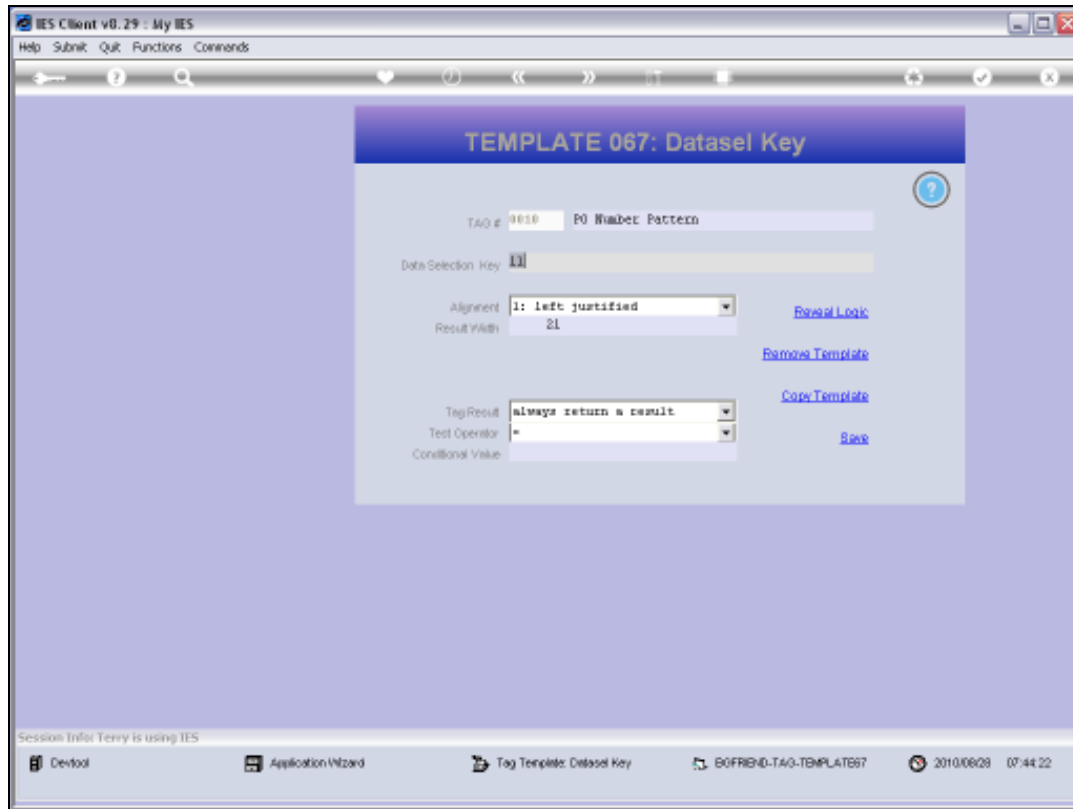
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Slide notes: The Transaction Select choices are only relevant if a Transaction Selection was actually performed for this Report, and the 'other' selection choices are always in sequence as appearing on the Data Selection screen performed by the User. Therefore, because our 'other' selection included only 1 option, i.e. Order Number pattern, then it must be the 1st choice of this group.



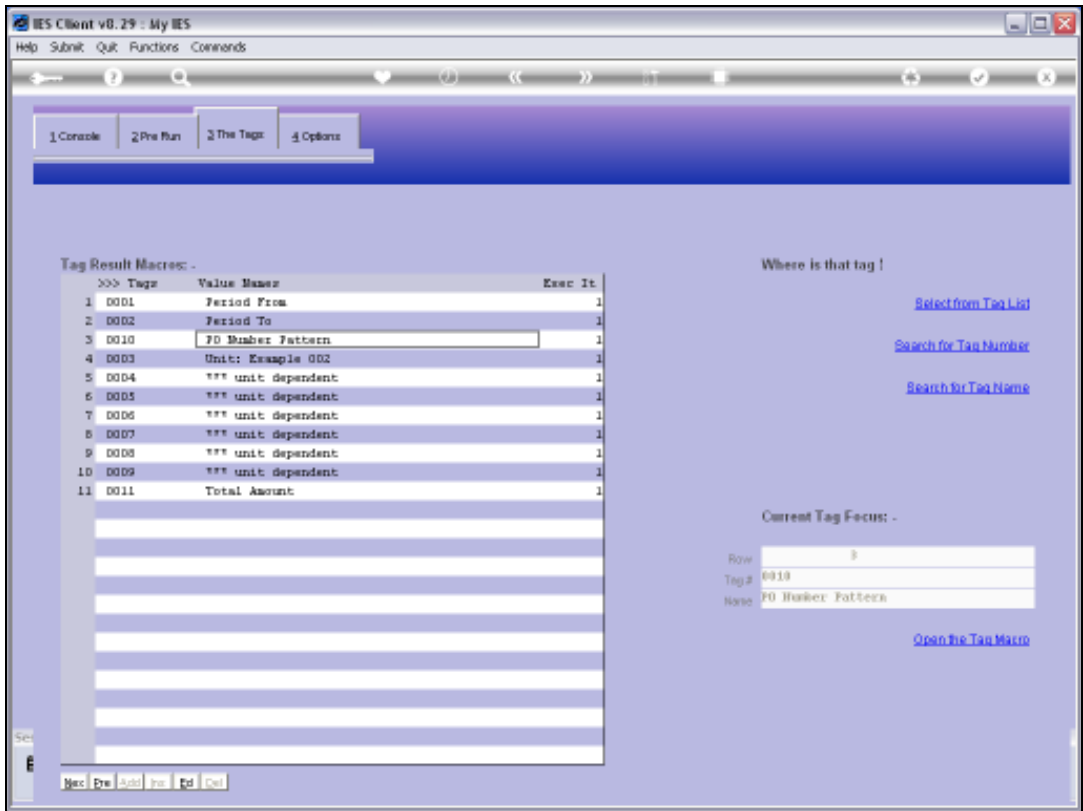
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Slide notes:

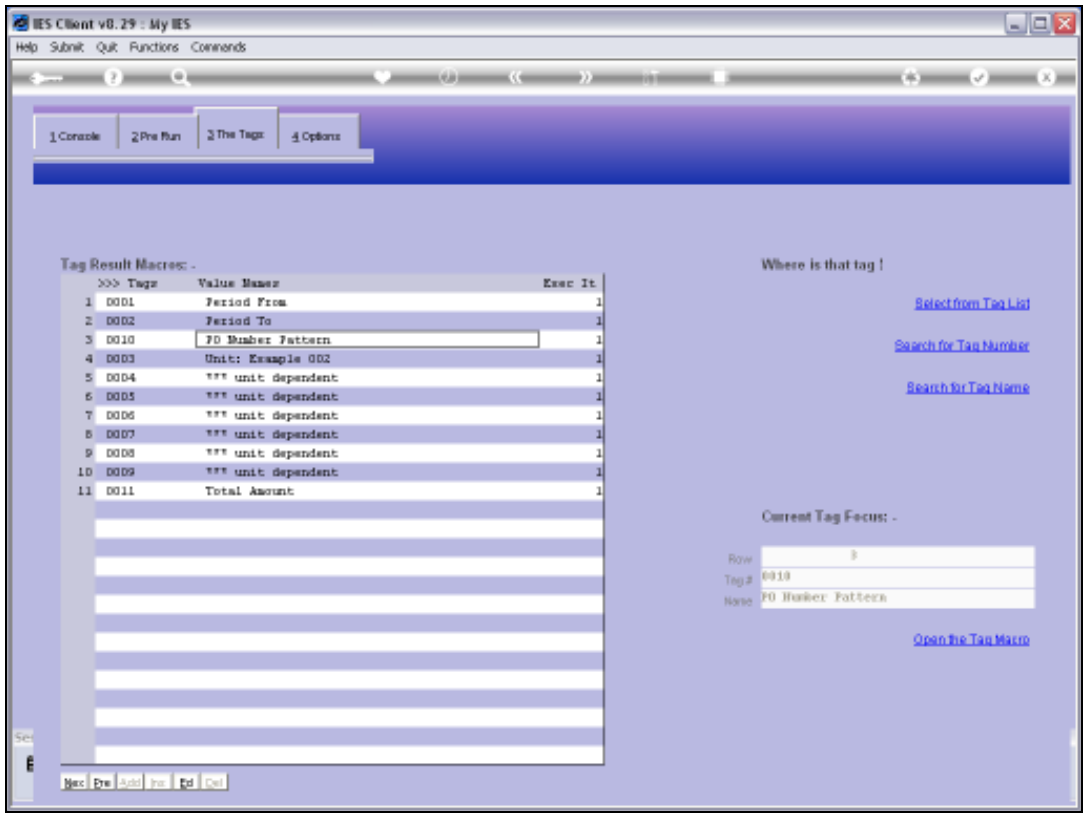


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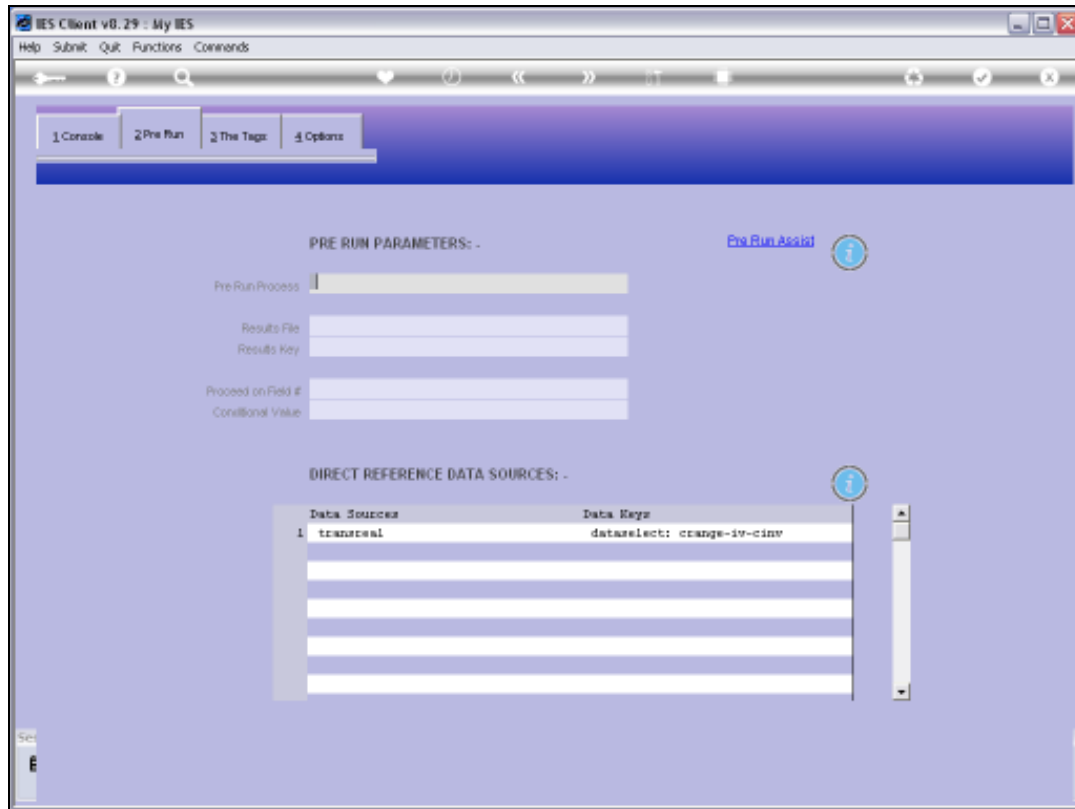
Slide notes:



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Slide notes:

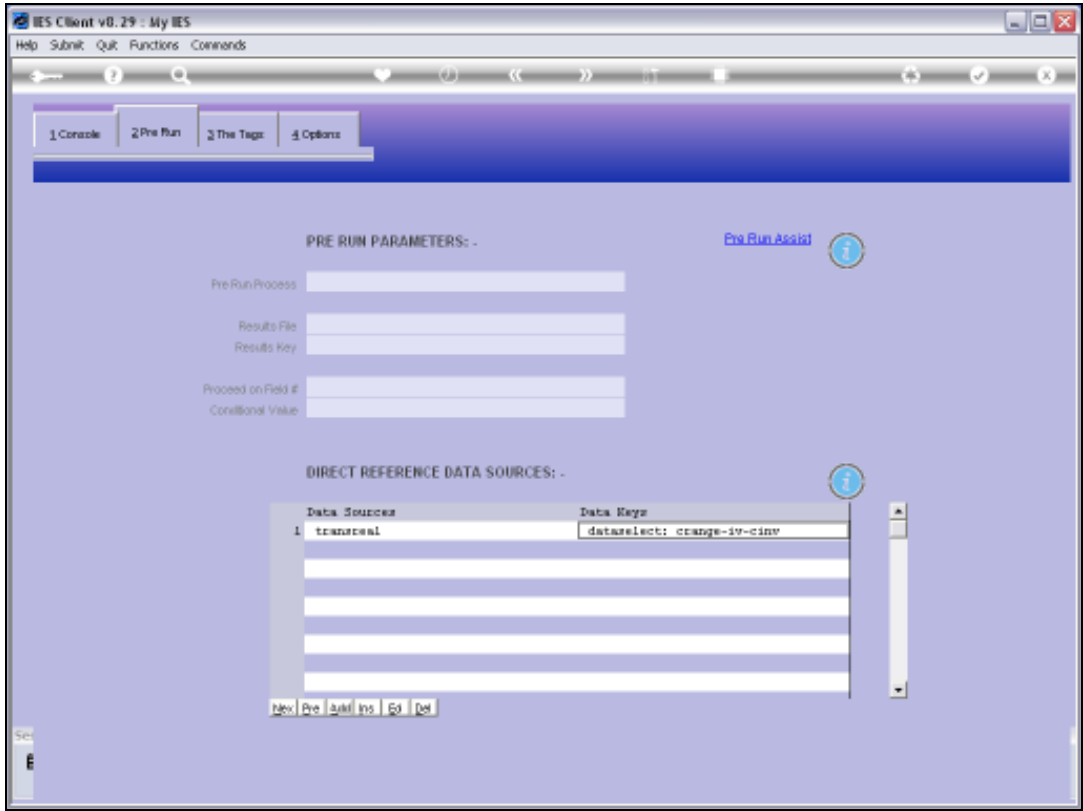


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Slide notes:

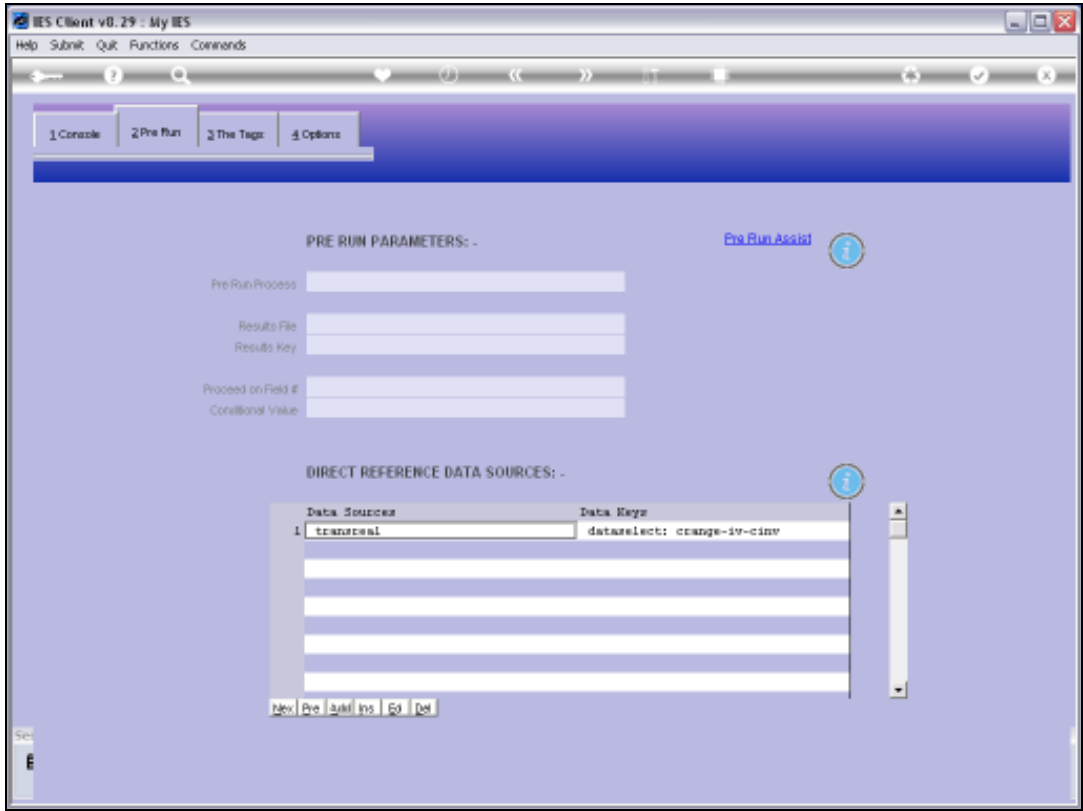


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Slide notes: On our report, the Data Selector listed for the 'transreal' Data Source is actually the trigger that causes the Data Selection choices to be offered to the User. Therefore, depending on which Data Selectors are used by a Report, if any, the choices will be different.



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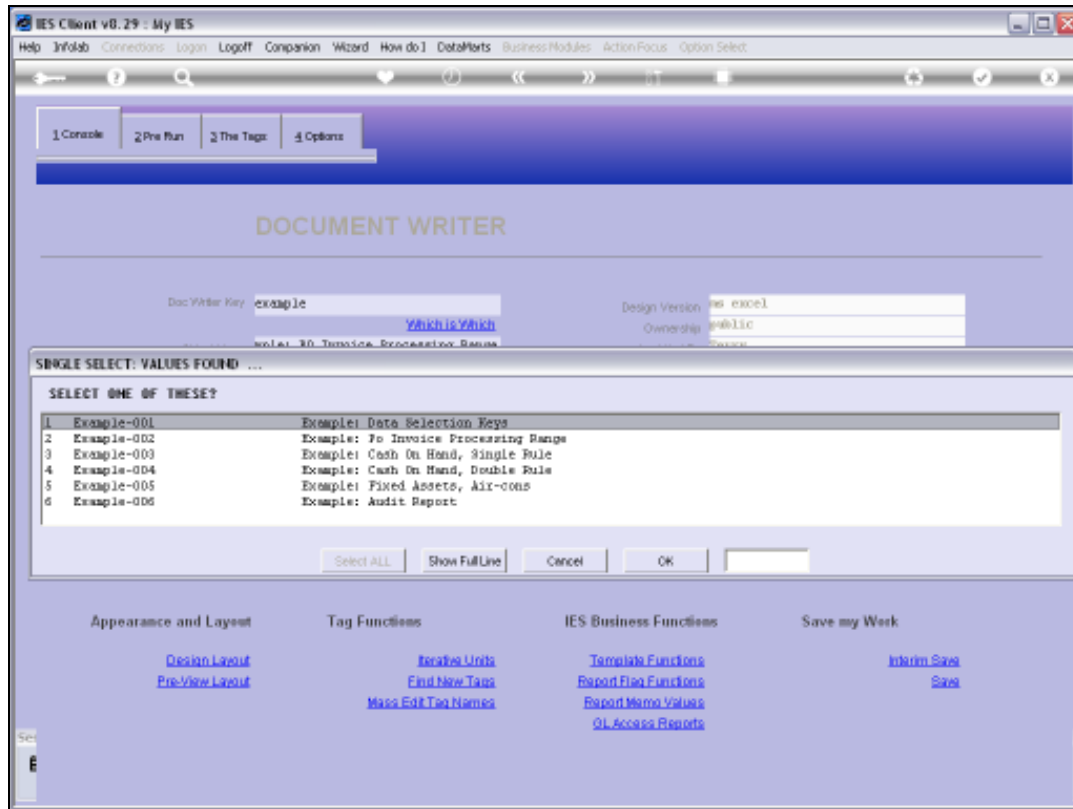
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Slide notes:



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Slide notes:



Slide 60

Slide notes: Actually, the system has an example Report that shows us all about the User Data Selection choices. If we have any difficulty in working out which choice to use in our Tag Template, then we can copy this Report and attach any Data Selector we wish to test, to see which choice we want to use in our Template.



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Slide notes:

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

Data Selection: -

This is a pre-selection of Data required for the current process. Please check the Help where necessary, before choosing NEXT ...

[Today](#)
[Yesterday](#)
[7 Days](#)
[14 Days](#)
[30 Days](#)
[Next](#)

Period From: 114
Period To: Jul 2010 (p 114)
Date From: 01/07/2010
Date To: 31/07/2010
Date Type: processing date
Time Frame: time range
Time From: 00:00:01
Time To: 23:59:59
Operator / User:

Session Info: Terry is using IES

Desktop Application Wizard Pre Data Selection BOFRIND-TRANS-SELECT-1 2010/08/28 07:45:36

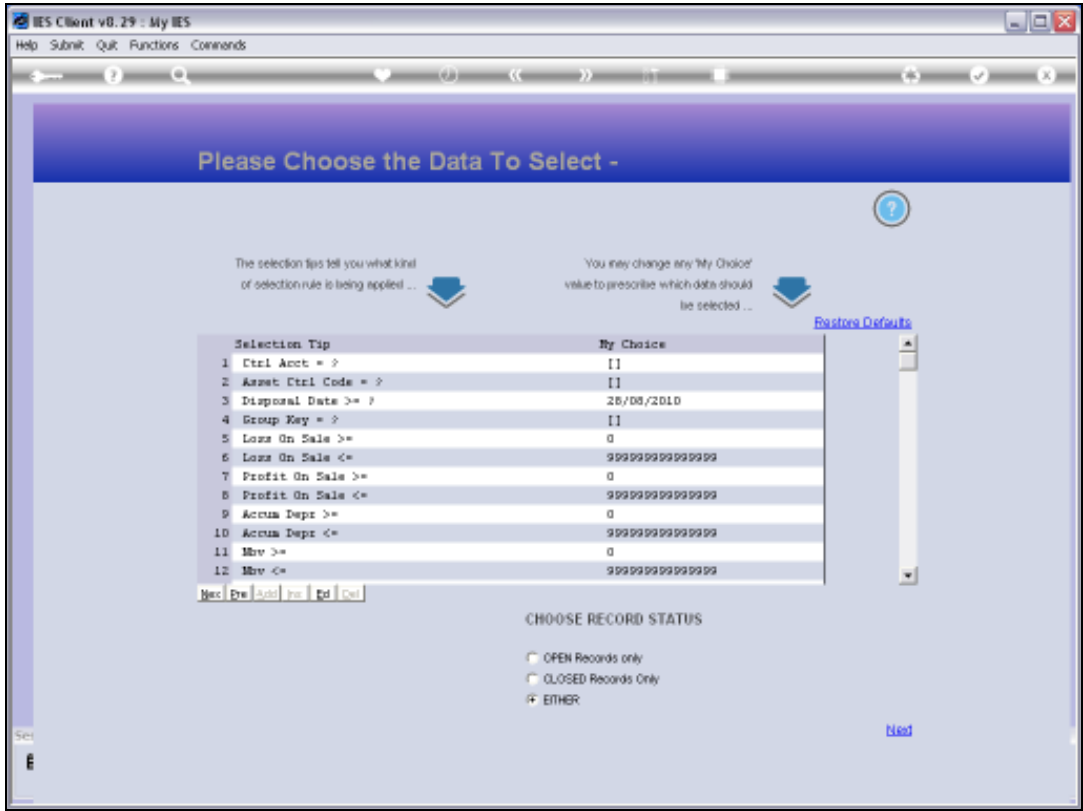
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Slide notes: The example Report makes a Transaction selection.



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Slide notes:



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Slide notes: And it also makes an Asset selection. Of course, we will be able to attach any other Data Selector to test with when we want to.

IES Client v0.29: My IES

Help Subnet Quit Functions Commands

Please Choose the Data To Select -

The selection tips tell you what kind of selection rule is being applied ...

You may change any 'My Choice' value to prescribe which data should be selected ...

Selection Tip	My Choice
1 Ctrl Acct = >	11
2 Asset Ctrl Code = >	11
3 Disposal Date >= ?	28/08/2010
4 Group Key = >	11
5 Loss On Sale >=	0
6 Loss On Sale <=	99999999999999
7 Profit On Sale >=	0
8 Profit On Sale <=	99999999999999
9 Accum Depr >=	0
10 Accum Depr <=	99999999999999
11 Mv >=	0
12 Mv <=	99999999999999

Next Prev Add Del F5 F6 F7 F8

CHOOSE RECORD STATUS

☐ OPEN Records only

☐ CLOSED Records Only

☒ EITHER

Next

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Slide notes:



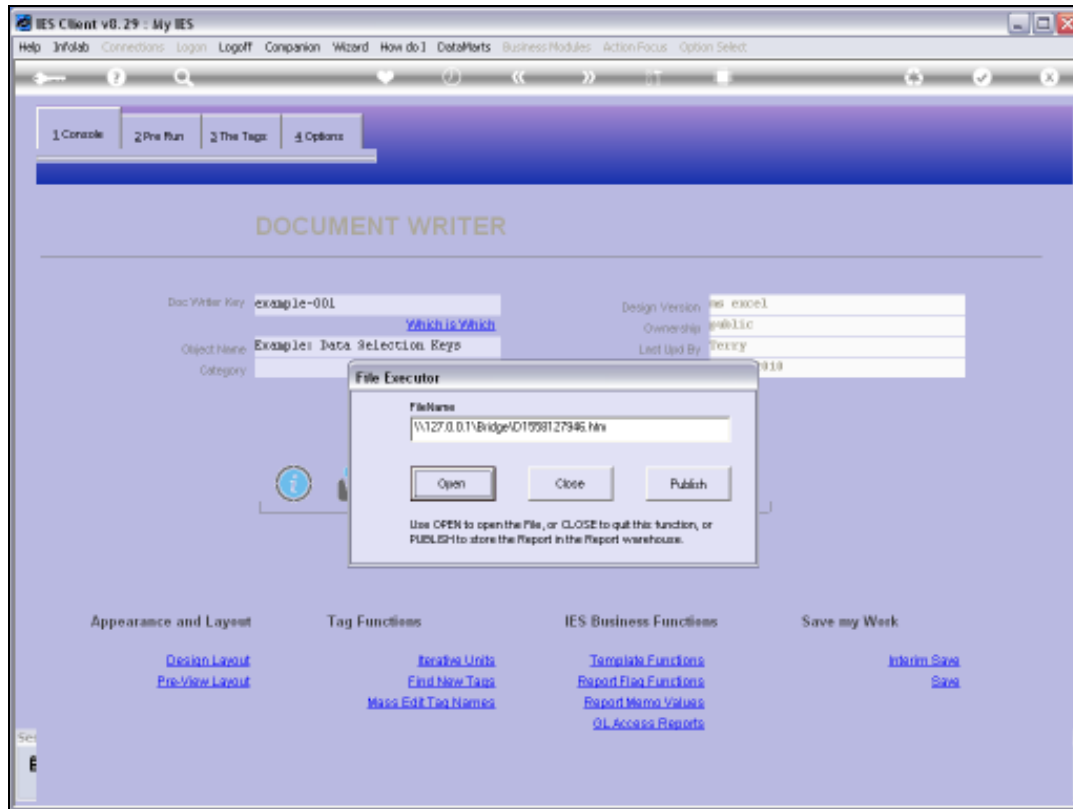
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Slide notes:



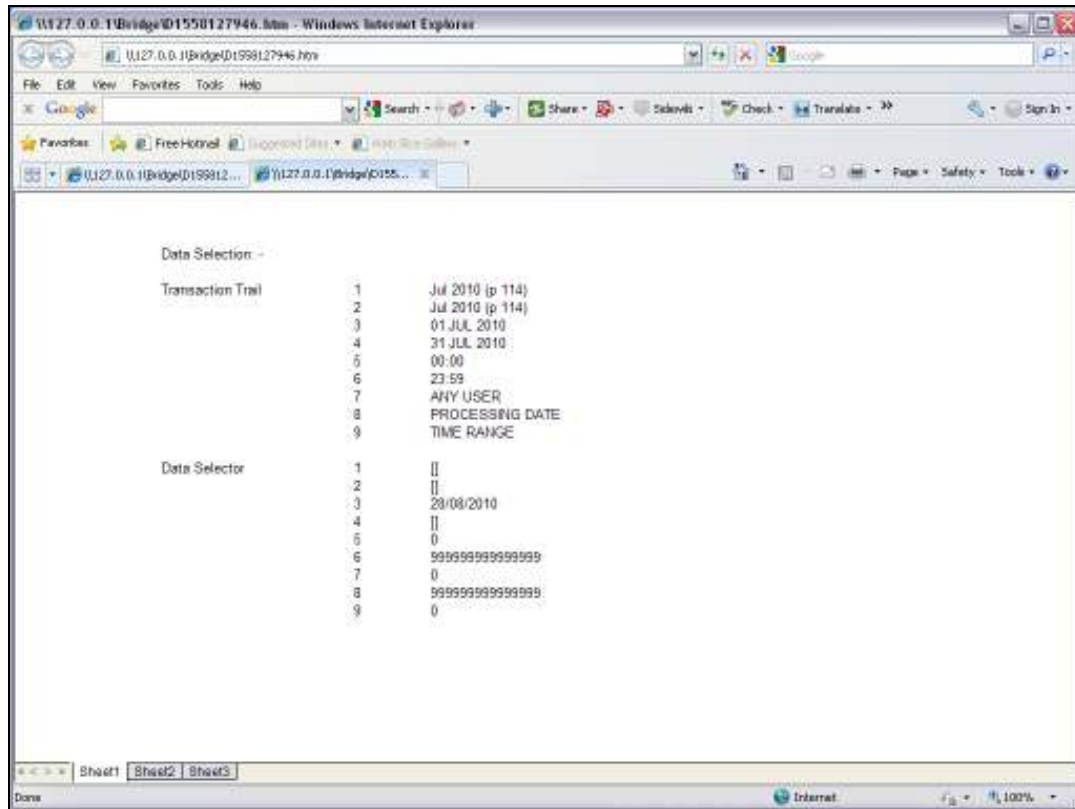
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Slide notes:



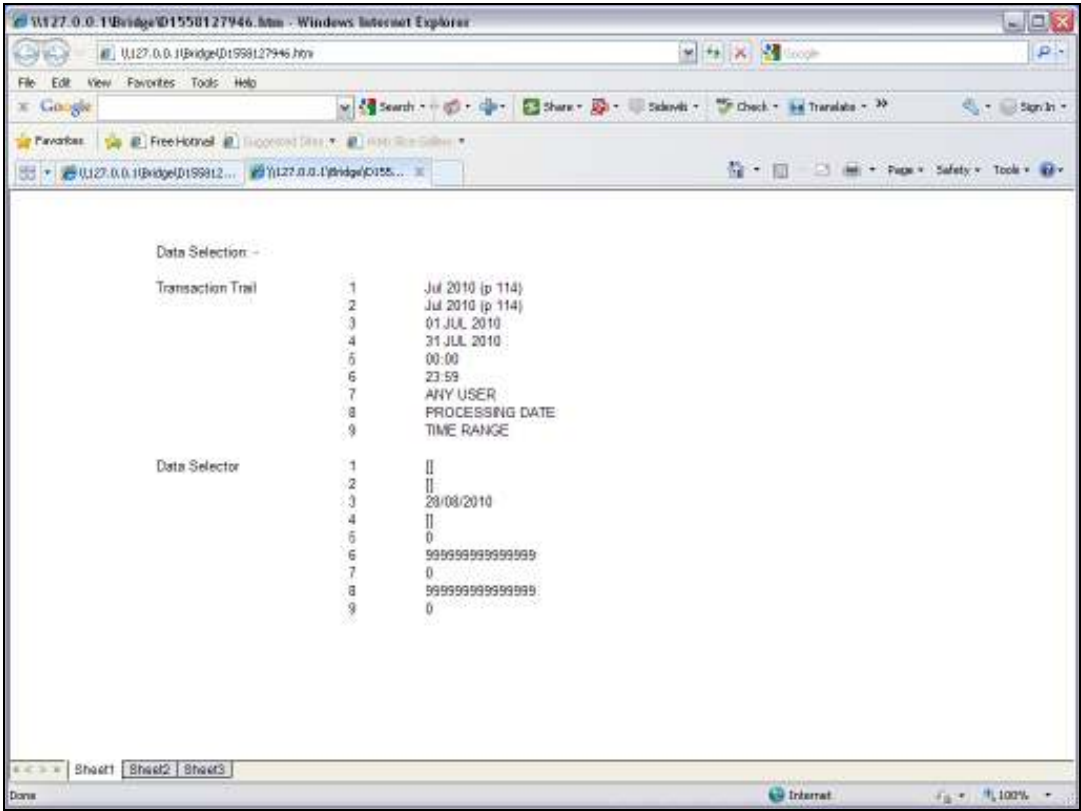
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Slide notes:



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Slide notes: And this Report reveals all the choices that the User made. So we can also view the Tags in the Report, if necessary, to ensure we understand how it's done.

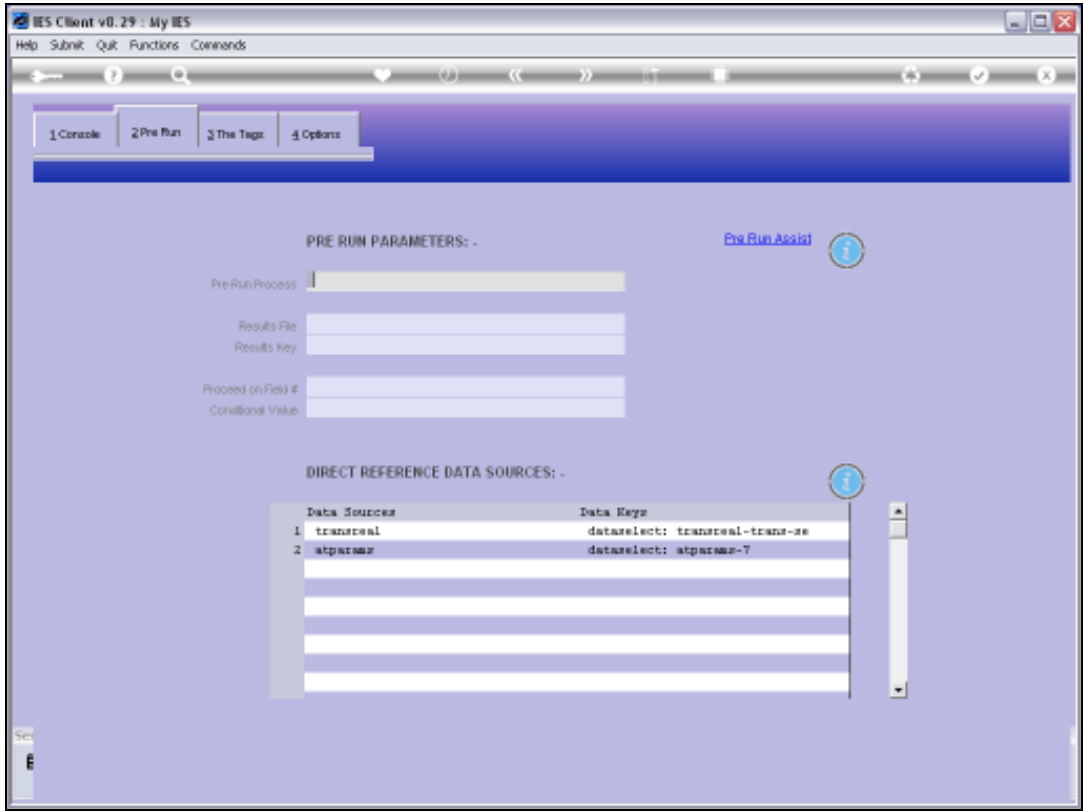


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Slide notes:



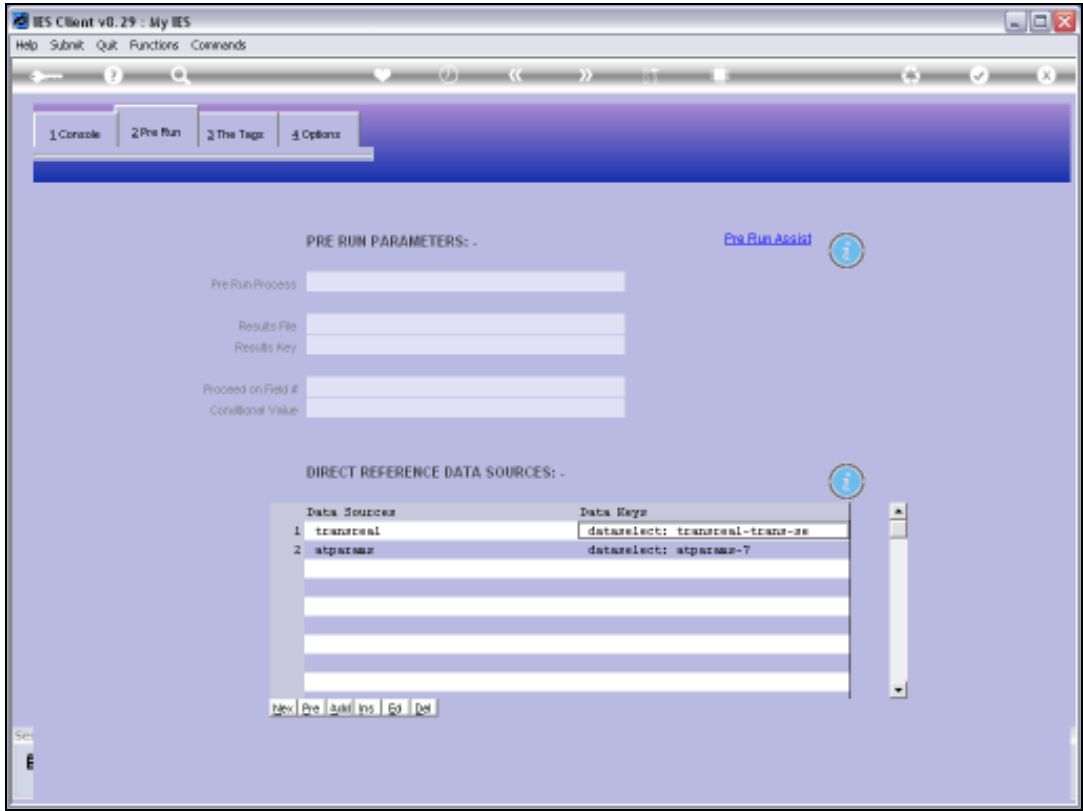
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Slide notes:



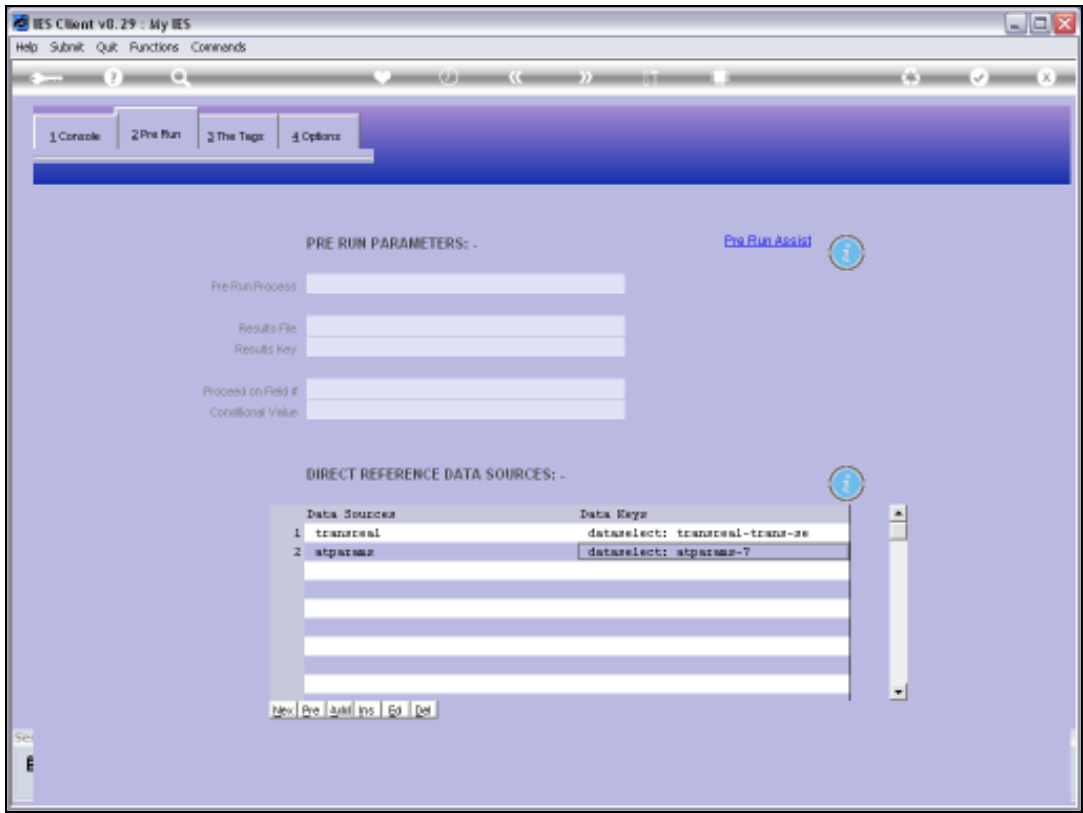
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Slide notes: These are the Data Selectors the example Report are currently using. When we copy the Report for testing, then we just include our new Report Data Selectors to test the User choices.



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Slide notes: And this is the Key for the Example Report.



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Slide notes: