

Slide 1 - Slide 1

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

QUICK REPORTS

Quick Report Key: leavedata
 *Descr: Leave Balances
 Source Filename: leavedata
 Heading: Leave Balances
 Header Subroutine: leavedata.hdr
 Footer Subroutine:

SAVE

Select DataNames
 Re-select Column Order
 Select Breaks
 Select Page Breaks
 Select Totals
 Select Sorts

Select Data Selectors
 Query Report Width

Verb: list
 Type: 2: Rep / Qry

Runtime Header
 Detail Suppress
 Id Suppress
 Inhibit Versions
 Double Space

Data Names	Breaks	Page Breaks	Totals
1 RKEY-5	1 dept-par	1	1
2 surname-par			
3 firstnames			
4 DEPT-PAR			
5 bal-a			
6 BAL-S			
7 bal-c			
8 bal-co			

Sort By	Dsmd / Exp
1 dept-par	
2 SURNAME-PAR	

Data Selector(s)	
1 leavedata-dept-key	LEAVE RECORDS BY DEPT
2 leavedata-shiftkey	LEAVE RECORDS BY SHIFT GROUP
3 LEAVEDATA-DEPT-KEY-NA	BY DEPT, INACTIVE EMPs
4 LEAVEDATA-SHIFTKEY-NA	BY SHIFT GROUP, INACTIVE EMPs

Slide notes

The Footer Subroutine is optional, seldom used, yet available to Developers when needed, and requires programming skills. When it is not specified, then the Report Key is the Footer.

Slide 2 - Slide 2

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

QUICK REPORTS

Quick Report Key: leavedata
 *Descr: Leave Balances
 Source Filename: leavedata
 Heading: Leave Balances
 Header Subroutine: leavedata.hdr
 Footer Subroutine:

[Select DataNames](#)
[Re-select Column Order](#)
[Select Breaks](#)
[Select Page Breaks](#)
[Select Totals](#)
[Select Sorts](#)

[SAVE](#)
[Select Data Selectors](#)
[Query Report Width](#)

Verb: list
 Type: 2: Rep / Qty

Runtime Header
 Detail Suppress
 Id Suppress
 Inhibit Versions
 Double Space

Data Names	Breaks	Page Breaks	Totals
1 RKEY-5	1 dept-par	1	1
2 surname-par			
3 firstnames			
4 DEPT-PAR			
5 bal-a			
6 BAL-S			
7 bal-c			
8 bal-co			

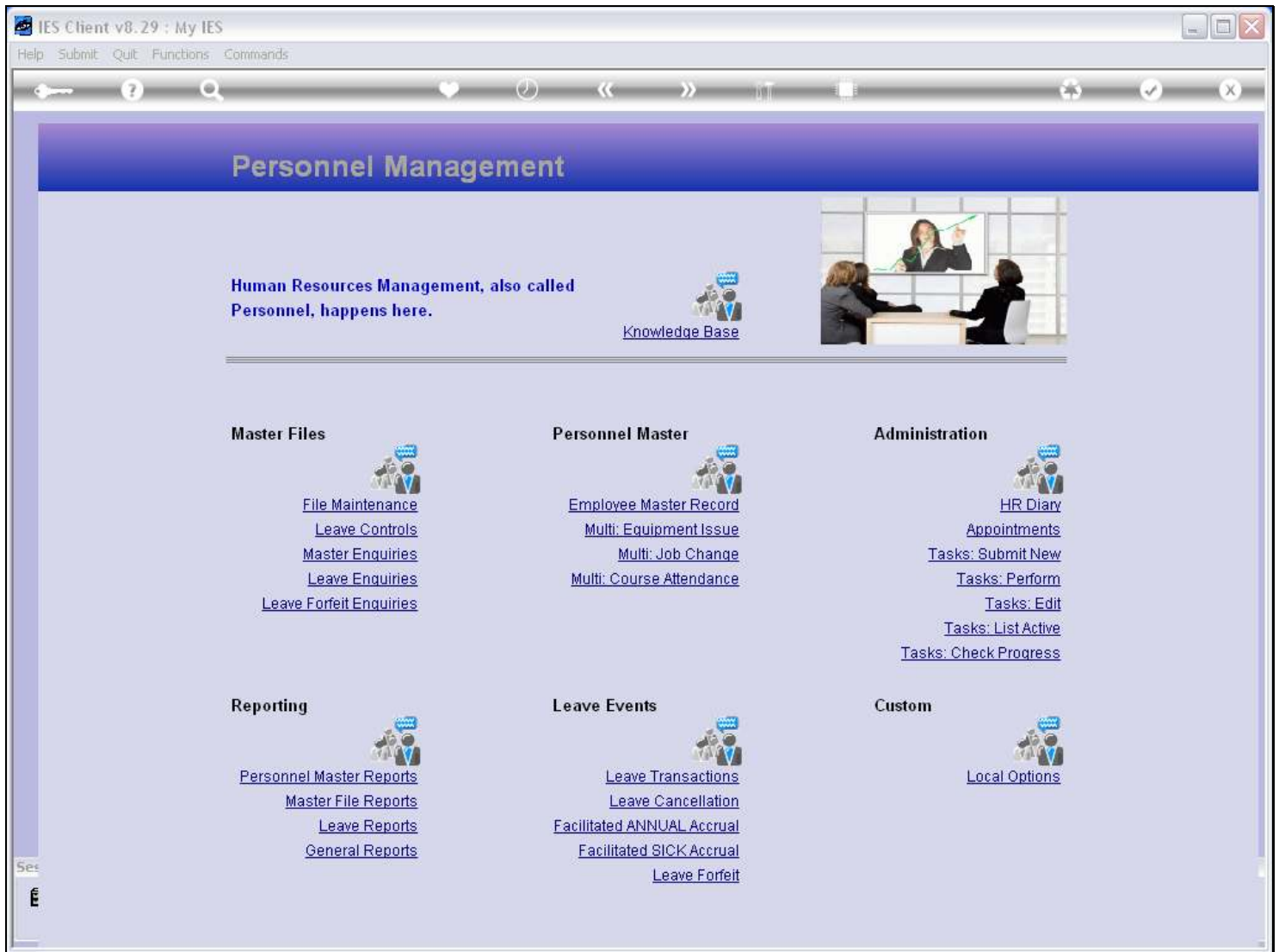
Sort By	Dsmd / Exp
1 dept-par	
2 SURNAME-PAR	

Data Selector(s)	
1 leavedata-dept-key	LEAVE RECORDS BY DEPT
2 leavedata-shiftkey	LEAVE RECORDS BY SHIFT GROUP
3 LEAVEDATA-DEPT-KEY-NA	BY DEPT, INACTIVE EMPS
4 LEAVEDATA-SHIFTKEY-NA	BY SHIFT GROUP, INACTIVE EMPS

Slide notes

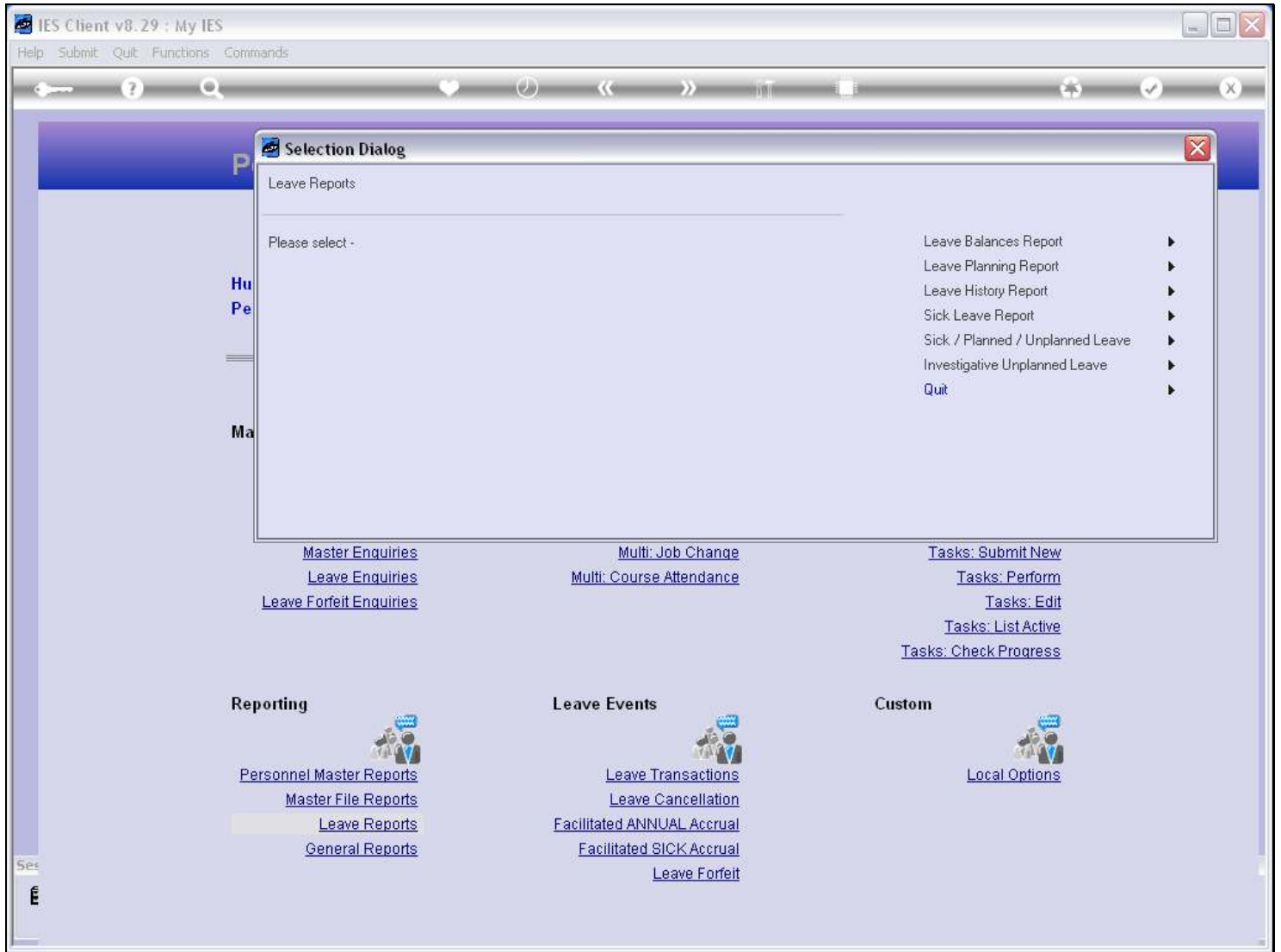
The Current Report Key is 'Leavedata'. Let us see, when we perform this Report from a Menu, whether it shows this key as the Report Footer.

Slide 3 - Slide 3



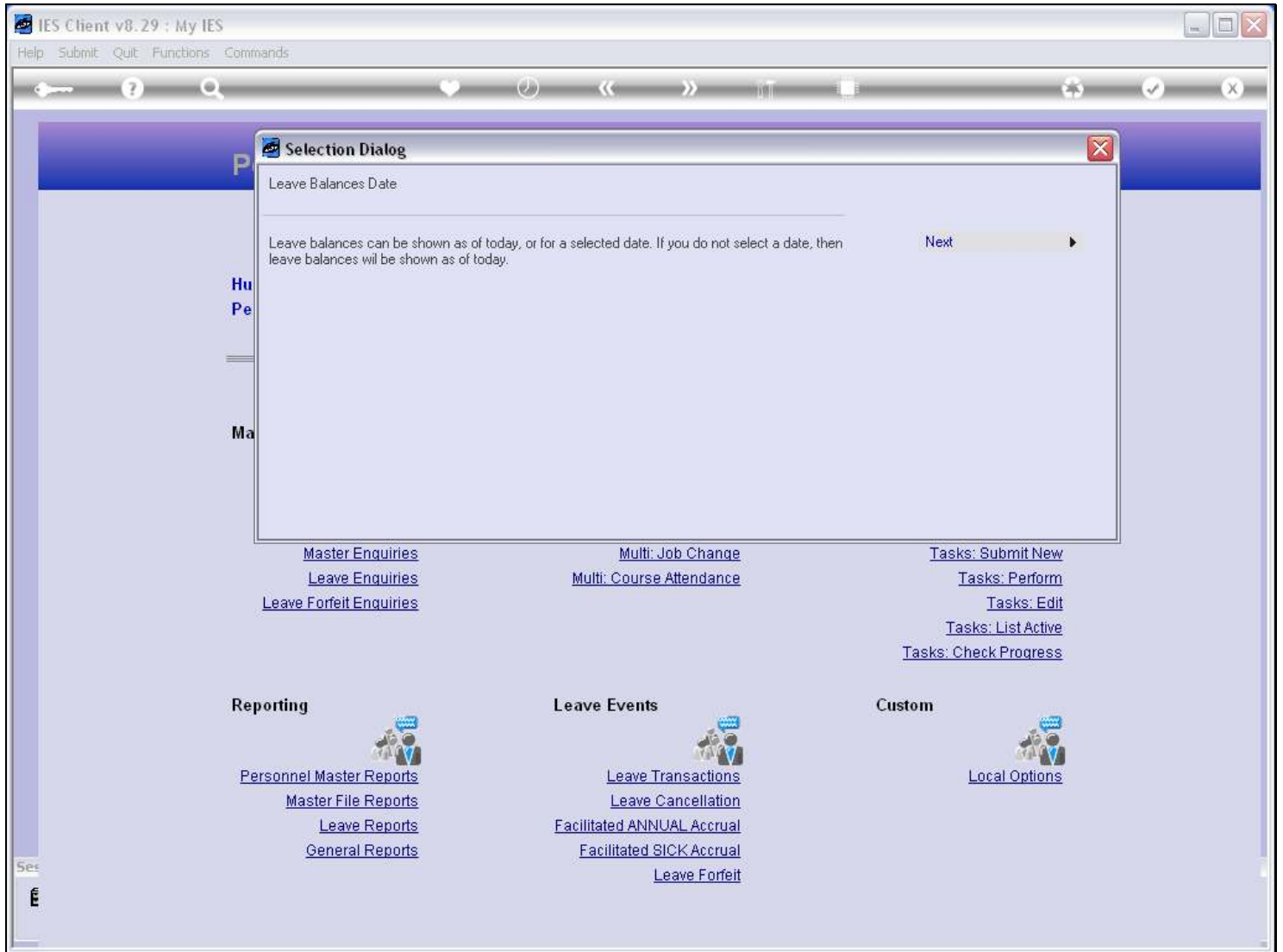
Slide notes

Slide 4 - Slide 4



Slide notes

Slide 5 - Slide 5



Slide notes

Slide 6 - Slide 6

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

Personnel Management

also called Knowledge Base

Date Selection

August 2010 August 2010

Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

File Maintenance

- Leave Controls
- Master Enquiries
- Leave Enquiries
- Leave Forfeit Enquiries

Reporting

- Personnel Master Reports
- Master File Reports
- Leave Reports
- General Reports

Personnel Master

- Employee Master Record
- Multi: Equipment Issue
- Multi: Job Change
- Multi: Course Attendance

Leave Events

- Leave Transactions
- Leave Cancellation
- Facilitated ANNUAL Accrual
- Facilitated SICK Accrual
- Leave Forfeit

Administration

- HR Diary
- Appointments
- Tasks: Submit New
- Tasks: Perform
- Tasks: Edit
- Tasks: List Active
- Tasks: Check Progress

Custom

- Local Options

Slide notes

Slide 7 - Slide 7

The screenshot shows the IES Client v8.29: My IES interface. The title bar includes 'Help', 'Submit', 'Quit', 'Functions', and 'Commands'. The main content area is titled 'IES REPORTS AND QUERIES: - User Instructions'. The interface is divided into several sections:

- NAME:** LEVEE BALANCES
- 1: - CHOOSE VERSION** (with a [Versions](#) link): Report Version is 'System Version: Leave Balances'.
- 2: - CHOOSE SETTINGS**: Format is 'report', OutPut is 'FILE', File Type is 'htm html file', Template is '05: Gummy Hoops Inc', and Report Header is 'Leave Balances as at 09/08/2010'.
- 3: - CHOOSE DATA SELECTOR** (with a [Change Selector](#) link): Data Selector is 'leavedata-dept-key LEAVE RECORDS BY DEPT'.
- 4: - TO e-MAIL THE RESULTS** (with a [Priority](#) dropdown set to 'normal'): Includes a 'Despatch By E-Mail' checkbox, 'Mail Drive' field, 'Mail To' field, 'Mail Title' 'Leave Balances', and 'Message Body' 'report by mail'.
- 5: - ADAPT DATA SELECTION (if prompts are present)** (with a [How to define MY CHOICE](#) link): A table with columns 'Selection Tip' and 'My Choice'. Row 1: 'Dept Key = ?' and '[]'. Below the table are buttons: 'Nex', 'Pre', 'Add', 'Ins', 'Ed', 'Del'.
- 6: - Record Select:** Includes radio buttons for 'OPEN Records only', 'CLOSED Records Only', and 'EITHER'.
- 7: - CHOOSE NEXT** (with a [Next](#) link).

Slide notes

Slide 8 - Slide 8

The screenshot shows the IES Client v8.29: My IES interface. The title bar includes 'Help', 'Submit', 'Quit', 'Functions', and 'Commands'. The main content area is titled 'IES REPORTS AND QUERIES: - User Instructions'. It features a series of numbered steps for configuring a report:

- 1: - CHOOSE VERSION** (with a [Versions](#) link): The 'Report Version' field is set to 'System Version: Leave Balances'.
- 2: - CHOOSE SETTINGS**: Fields include 'Format' (report), 'OutPut' (FILE), 'File Type' (htm html file), 'Template' (05: Gummy Hoops Inc), and 'Report Header' (Leave Balances as at 09/08/2010).
- 3: - CHOOSE DATA SELECTOR** (with a [Change Selector](#) link): The 'Data Selector' is 'leavedata-dept-key LEAVE RECORDS BY DEPT'.
- 4: - TO e-MAIL THE RESULTS** (with a [Priority](#) dropdown): Includes a 'Despatch By E-Mail' checkbox, 'Mail Drive' (normal), 'Mail To' field, 'Mail Title' (Leave Balances), and 'Message Body' (report by mail).
- 5: - ADAPT DATA SELECTION (if prompts are present)** (with a [How to define MY CHOICE](#) link): A table for defining choices is shown:

Selection Tip	My Choice
1 Dept Key = ?	[]

Below the table are buttons: 'Nex', 'Pre', 'Add', 'Ins', 'Ed', 'Del'.
- 6: - Record Select:** Radio buttons for 'OPEN Records only', 'CLOSED Records Only', and 'EITHER'.
- 7: - CHOOSE NEXT** (with a [Next](#) link).

Slide notes

Slide 9 - Slide 9

EmpNo	Surname	Given Names	Department	.Annual	...Sick	.Casual	..Comp.
3022	Martinez	Larry J.	[] Estate 3	15	10	0	0
3058	Miller	George K.	[] Estate 3	13	9	0	0
3035	Mitchell	Matthew G.	[] Estate 3	10	10	0	0
3059	Morgan	Kenneth S.	[] Estate 3	12	9	0	0
3042	Morgan	Gregory J.	[] Estate 3	15	10	0	0
3047	Morris	Christopher D.	[] Estate 3	13	9	0	0
3040	Morris	Jose L.	[] Estate 3	13	10	0	0
3028	Nelson	James J.	[] Estate 3	15	10	0	1
3019	Peterson	Richard C.	[] Estate 3	14	8	0	0
3051	Phillips	Stephen A.	[] Estate 3	2	-1	0	0
3018	Ramirez	Larry J.	[] Estate 3	15	10	0	0
3023	Roberts	Timothy J.	[] Estate 3	2	9	0	0
3024	Rogers	Walter J.	[] Estate 3	14	9	0	0
3044	Scott	Larry J.	[] Estate 3	15	10	0	0
3057	Taylor	Gary T.	[] Estate 3	12	10	0	0
3029	Taylor	Timothy J.	[] Estate 3	-4	9	0	0
3027	Thomas	Jason M.	[] Estate 3	3	8	0	0
3048	Torres	Steven E.	[] Estate 3	12	6	0	0
3032	Walker	Brian R.	[] Estate 3	15	10	0	0
3046	Williams	Michael W.	[] Estate 3	14	8	0	0
3017	Williams	Thomas C.	[] Estate 3	15	10	0	0
			**				
1190	Rogers	Margaret D.	[] Estate 4	5	7	0	0
			**				
1024	Morris	Kenneth S.	[] Estate 5	14	6	0	0
			**				
1004	Chan	Lisa N.	[] Finance	7	9	0	7
	reportkey=LEAVEDATA						
	13:55:10	09 AUG 2010	page 2				
			Leave Balances as at 09/08/2010				
1177	Davis	Helen S.	[] Finance	14	10	0	0
1141	Jones	Edward B.	[] Finance	14	7	0	0

Slide notes

Slide 10 - Slide 10

EmpNo	Surname	Given Names	Department	.Annual	...Sick	.Casual	..Comp.
3022	Martinez	Larry J.	[] Estate 3	15	10	0	0
3058	Miller	George K.	[] Estate 3	13	9	0	0
3035	Mitchell	Matthew G.	[] Estate 3	10	10	0	0
3059	Morgan	Kenneth S.	[] Estate 3	12	9	0	0
3042	Morgan	Gregory J.	[] Estate 3	15	10	0	0
3047	Morris	Christopher D.	[] Estate 3	13	9	0	0
3040	Morris	Jose L.	[] Estate 3	13	10	0	0
3028	Nelson	James J.	[] Estate 3	15	10	0	1
3019	Peterson	Richard C.	[] Estate 3	14	8	0	0
3051	Phillips	Stephen A.	[] Estate 3	2	-1	0	0
3018	Ramirez	Larry J.	[] Estate 3	15	10	0	0
3023	Roberts	Timothy J.	[] Estate 3	2	9	0	0
3024	Rogers	Walter J.	[] Estate 3	14	9	0	0
3044	Scott	Larry J.	[] Estate 3	15	10	0	0
3057	Taylor	Gary T.	[] Estate 3	12	10	0	0
3029	Taylor	Timothy J.	[] Estate 3	-4	9	0	0
3027	Thomas	Jason M.	[] Estate 3	3	8	0	0
3048	Torres	Steven E.	[] Estate 3	12	6	0	0
3032	Walker	Brian R.	[] Estate 3	15	10	0	0
3046	Williams	Michael W.	[] Estate 3	14	8	0	0
3017	Williams	Thomas C.	[] Estate 3	15	10	0	0
			**				
1190	Rogers	Margaret D.	[] Estate 4	5	7	0	0
			**				
1024	Morris	Kenneth S.	[] Estate 5	14	6	0	0
			**				
1004	Chan	Lisa N.	[] Finance	7	9	0	7
	reportkey=LEAVEDATA						
	13:55:10	09 AUG 2010	page 2				
			Leave Balances as at 09/08/2010				
1177	Davis	Helen S.	[] Finance	14	10	0	0
1141	Jones	Edward B.	[] Finance	14	7	0	0

Slide notes

Sure enough, at the end of each Report Page, the footer is there, and it is the same as the Report Key.

Slide 11 - Slide 11

Slide notes

Still, there may be an occasion when we want to use the Footer Subroutine option, as shown for this Payroll Report.

Slide 12 - Slide 12

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

QUICK REPORTS

Quick Report Key: **pay-t02-result-01**

*Descr	Payroll Main Result
Source Filename	genreprs
Heading	Payroll Main Result
Header Subroutine	quick.hdr.sys
Footer Subroutine	pay.t02.result06

[Select DataNames](#) [Re-select Column Order](#) [Select Breaks](#) [Select Page Breaks](#) [Select Totals](#) [Select Sorts](#)

[SAVE](#) [Select Data Selectors](#) [Query Report Width](#)

Verb: list
Type: 2: Rep / Qty

Runtime Header
 Detail Suppress
 Id Suppress
 Inhibit Versions
 Double Space

Data Names	Breaks	Page Breaks	Totals
1 pt02-emp-sh	1 pt02-gang-sh	1	1 pt02-basic-sh
2 pt02-status-sh			2 pt02-earn-nat-s
3 pt02-nstatus-sh			3 pt02-fpremi-sh
4 pt02-basic-sh			4 pt02-hpremi-sh
5 pt02-earn-nat-s			5 pt02-opremi-sh
6 pt02-fpremi-sh			6 pt02-otamt-sh
7 pt02-hpremi-sh			7 pt02-earjamsos-
8 pt02-opremi-sh			8 pt02-earnother-
9 pt02-otamt-sh			9 pt02-gross
10 pt02-earjamsos-			10 pt02-ded-ml-sh
11 pt02-earnother-			11 pt02-ded-pl-sh
12 pt02-gross			12 pt02-ded-other-
13 pt02-ded-ml-sh			
14 pt02-ded-pl-sh			
15 pt02-ded-other-			
16 pt02-ded-tot-sh			
17 pt02-net-pay-sh			
18 pt02-gang-sh			
19 pt02-div-sh			

Sort By	Dsmd / Exp	Data Selector(s)
1 pt02-div-sh		1 genreprs-pay-t02 BASIS SELECT FOR GENREPS: PAYR
2 pt02-gang-sh		

Slide notes

Slide 13 - Slide 13

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

QUICK REPORTS

[SAVE](#)

Quick Report Key	pay-t02-result-01
*Descr	Payroll Main Result
Source Filename	genreps
Heading	Payroll Main Result
Header Subroutine	quick.hdr.sys
Footer Subroutine	pay.t02.result06

[Select DataNames](#)
[Re-select Column Order](#)
[Select Breaks](#)
[Select Page Breaks](#)
[Select Totals](#)
[Select Sorts](#)

[Select Data Selectors](#)
[Query Report Width](#)

Data Names

- 1 pt02-emp-sh
- 2 pt02-status-sh
- 3 pt02-nstatus-sh
- 4 pt02-basic-sh
- 5 pt02-earn-nat-s
- 6 pt02-fpremi-sh
- 7 pt02-hpremi-sh
- 8 pt02-opremi-sh
- 9 pt02-otamt-sh
- 10 pt02-earjamsos-
- 11 pt02-earnother-
- 12 pt02-gross
- 13 pt02-ded-ml-sh
- 14 pt02-ded-pl-sh
- 15 pt02-ded-other-
- 16 pt02-ded-tot-sh
- 17 pt02-net-pay-sh
- 18 pt02-gang-sh
- 19 pt02-div-sh

Breaks

- 1 pt02-gang-sh

Page Breaks

- 1

Totals

- 1 pt02-basic-sh
- 2 pt02-earn-nat-s
- 3 pt02-fpremi-sh
- 4 pt02-hpremi-sh
- 5 pt02-opremi-sh
- 6 pt02-otamt-sh
- 7 pt02-earjamsos-
- 8 pt02-earnother-
- 9 pt02-gross
- 10 pt02-ded-ml-sh
- 11 pt02-ded-pl-sh
- 12 pt02-ded-other-

Sort By Dsmd / Exp

- 1 pt02-div-sh
- 2 pt02-gang-sh

Data Selector(s)

- 1 genreps-pay-t02 BASIS SELECT FOR GENREPS: PAYR

Verb: list

Type: 2: Rep / Qty

Runtime Header
 Detail Suppress
 Id Suppress
 Inhibit Versions
 Double Space

Slide notes

Slide 14 - Slide 14

The screenshot shows a window titled "IES Client v8.29 : My IES" with a menu bar (Help, Submit, Quit, Functions, Commands) and a toolbar. The main content area is titled "Document" and contains the following text:

CURRENT PROCESS = [PARA] QUICK REPORT

The Footer Subroutine is optional. By default, the system inserts the Report Key as the footer. In cases where a different requirement is applicable, a subroutine can be specified, and it will be called with 1 parameter, which should return the Footer string. For example, a string like:

```
"'lc'Approved ..... Date ....."
```

will insert a footer with the text shown above, after a line feed, and centered.

Function

Quick Report Definition.

Caution

None.

Description

Quick Reports are easy and quick to define, but are nevertheless quite powerful.

Quick Reports also allow you to maintain your own versions of a system Report, by changing around the columns, excluding some, including others, etc.

Simply follow the prompts, and check the help on any prompt as necessary.

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" button. Below the search field, it says "Search the IES web on-line documentation by typing a phrase, then choose 'search'."

At the bottom of the window, there is a "Doc Key" field containing "tt*userdirect".

Slide notes

The Help explains, and the Subroutine, if used, will be called with 1 argument variable in which we can return the Footer String to the Report.

Slide 15 - Slide 15

The screenshot shows a web browser window titled "IES Client v8.29 : My IES". The browser's address bar contains the text "Doc Key tt*userdirect". The main content area displays a document titled "Document" with the following text:

CURRENT PROCESS = [PARA] QUICK REPORT

The Footer Subroutine is optional. By default, the system inserts the Report Key as the footer. In cases where a different requirement is applicable, a subroutine can be specified, and it will be called with 1 parameter, which should return the Footer string. For example, a string like:

```
"'lc'Approved ..... Date ....."
```

will insert a footer with the text shown above, after a line feed, and centered.

Function

Quick Report Definition.

Caution

None.

Description

Quick Reports are easy and quick to define, but are nevertheless quite powerful.

Quick Reports also allow you to maintain your own versions of a system Report, by changing around the columns, excluding some, including others, etc.

Simply follow the prompts, and check the help on any prompt as necessary.

On the right side of the browser window, there is a sidebar with a "Next" link at the top, a "Make a copy -" button with a "Text Copy" link, a "Search Phrase" input field, and a "Search" button. Below the search field, there is a note: "Search the IES web on-line documentation by typing a phrase, then choose 'search'."

Slide notes

Slide 16 - Slide 16

The screenshot shows the IES Client v8.29: My IES interface. The main window is titled "QUICK REPORTS" and displays the following configuration:

Quick Report Key	pay-t02-result-01
*Descr	Payroll Main Result
Source Filename	genreps
Heading	Payroll Main Result
Header Subroutine	quick.hdr.sys
Footer Subroutine	pay.t02.result06

On the right side, there are several configuration options:

- [Select DataNames](#)
- [Re-select Column Order](#)
- [Select Breaks](#)
- [Select Page Breaks](#)
- [Select Totals](#)
- [Select Sorts](#)
- [Select Data Selectors](#)
- [Query Report Width](#)

A pop-up window titled "QM" displays the footer subroutine code:

```
subroutine pay.t02.result06<footer>
* footer = "1"   Approved <1>:..... Approved <2>:.....
*
return
```

The main window also shows a list of Data Names on the left, including:

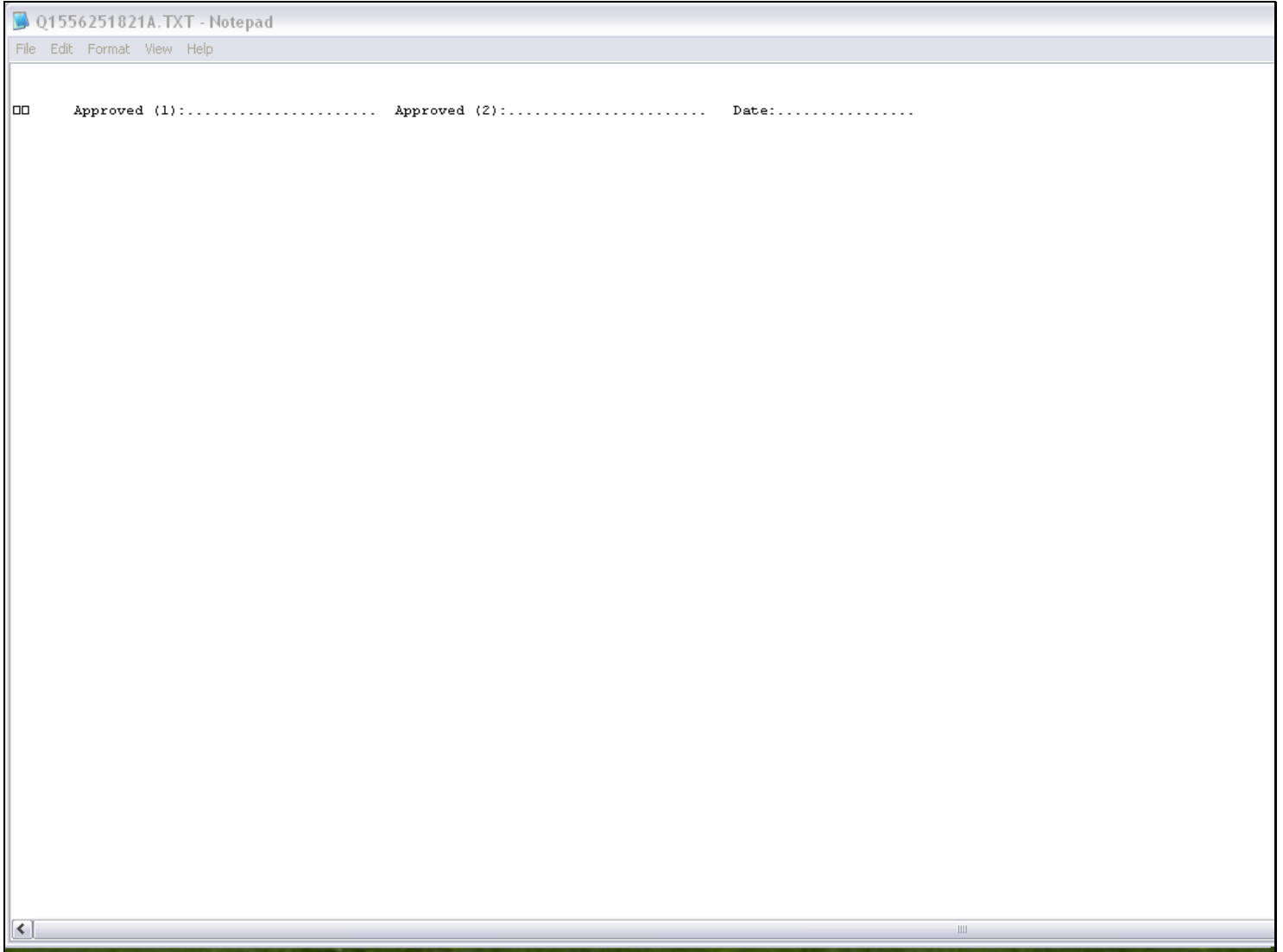
- 1 pt02-emp-sh
- 2 pt02-status-s
- 3 pt02-nstatus-
- 4 pt02-basic-sp
- 5 pt02-earn-nat
- 6 pt02-fpremi-s
- 7 pt02-hpremi-s
- 8 pt02-opremi-s
- 9 pt02-otamt-sp
- 10 pt02-earjams
- 11 pt02-earnothe
- 12 pt02-gross
- 13 pt02-ded-ml-s
- 14 pt02-ded-pl-s
- 15 pt02-ded-othe
- 16 pt02-ded-tot-
- 17 pt02-net-pay-
- 18 pt02-gang-sh
- 19 pt02-div-sh

At the bottom right, there are controls for Verb (list) and Type (2: Rep / Qry), along with checkboxes for Runtime Header, Detail Suppress, Id Suppress, Inhibit Versions, and Double Space.

Slide notes

Here we see the Footer Subroutine for the Report Example. It is uncomplicated, and basically formats a Text Line that provides for Approval Signatures on each page of the Report.

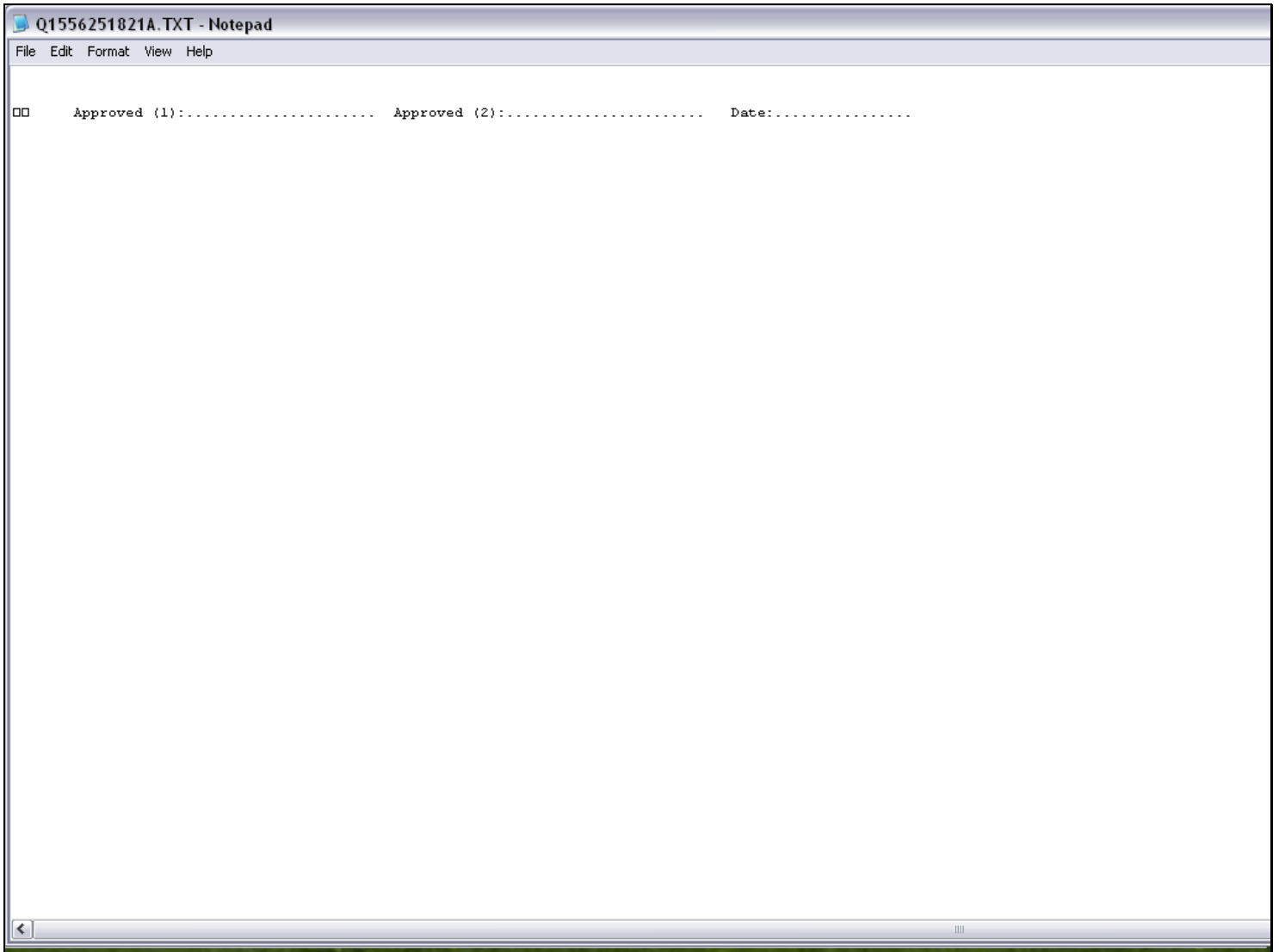
Slide 17 - Slide 17



Slide notes

In practice, when the Report is produced, it has this effect.

Slide 18 - Slide 18



Slide notes