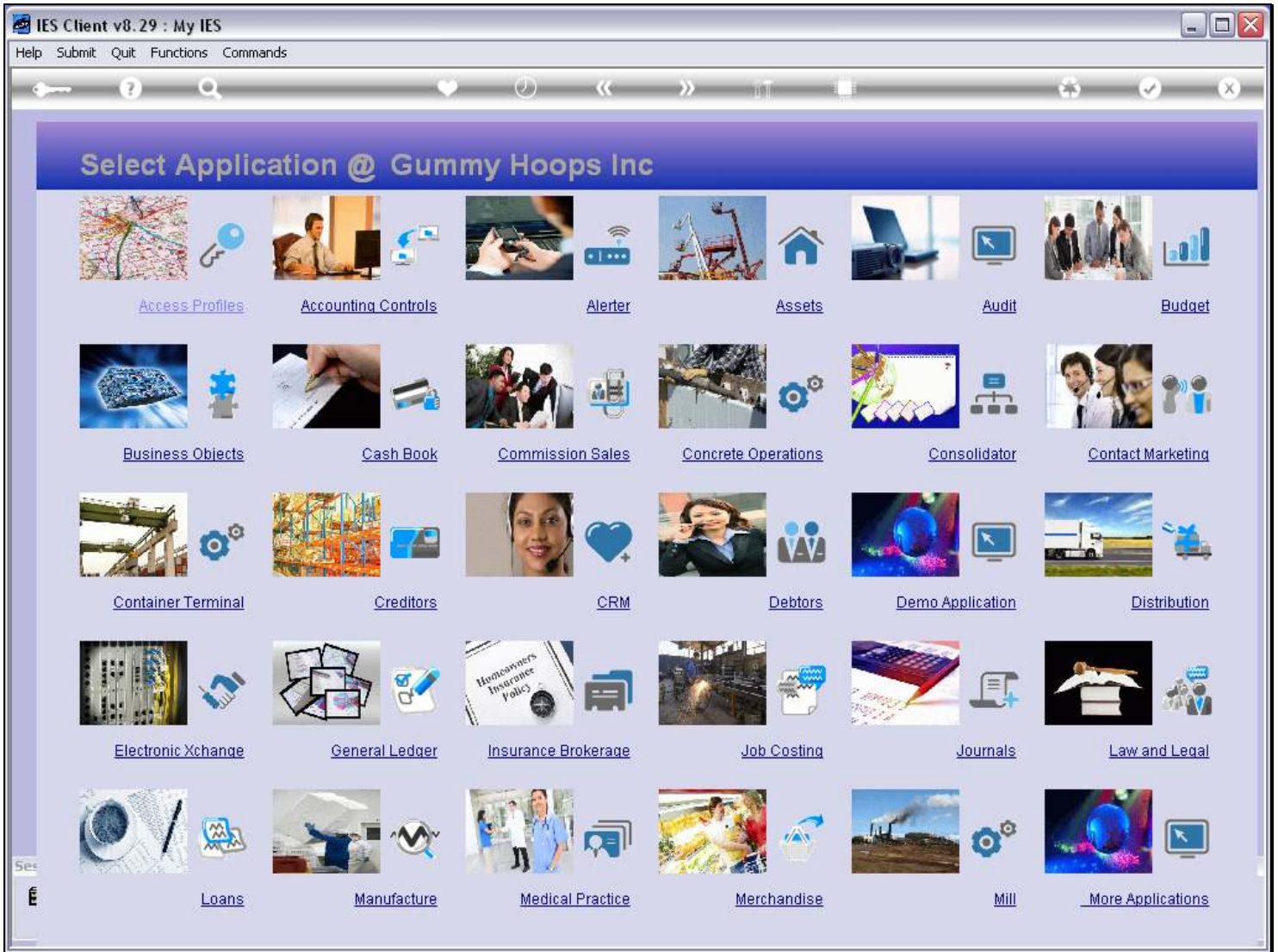


a

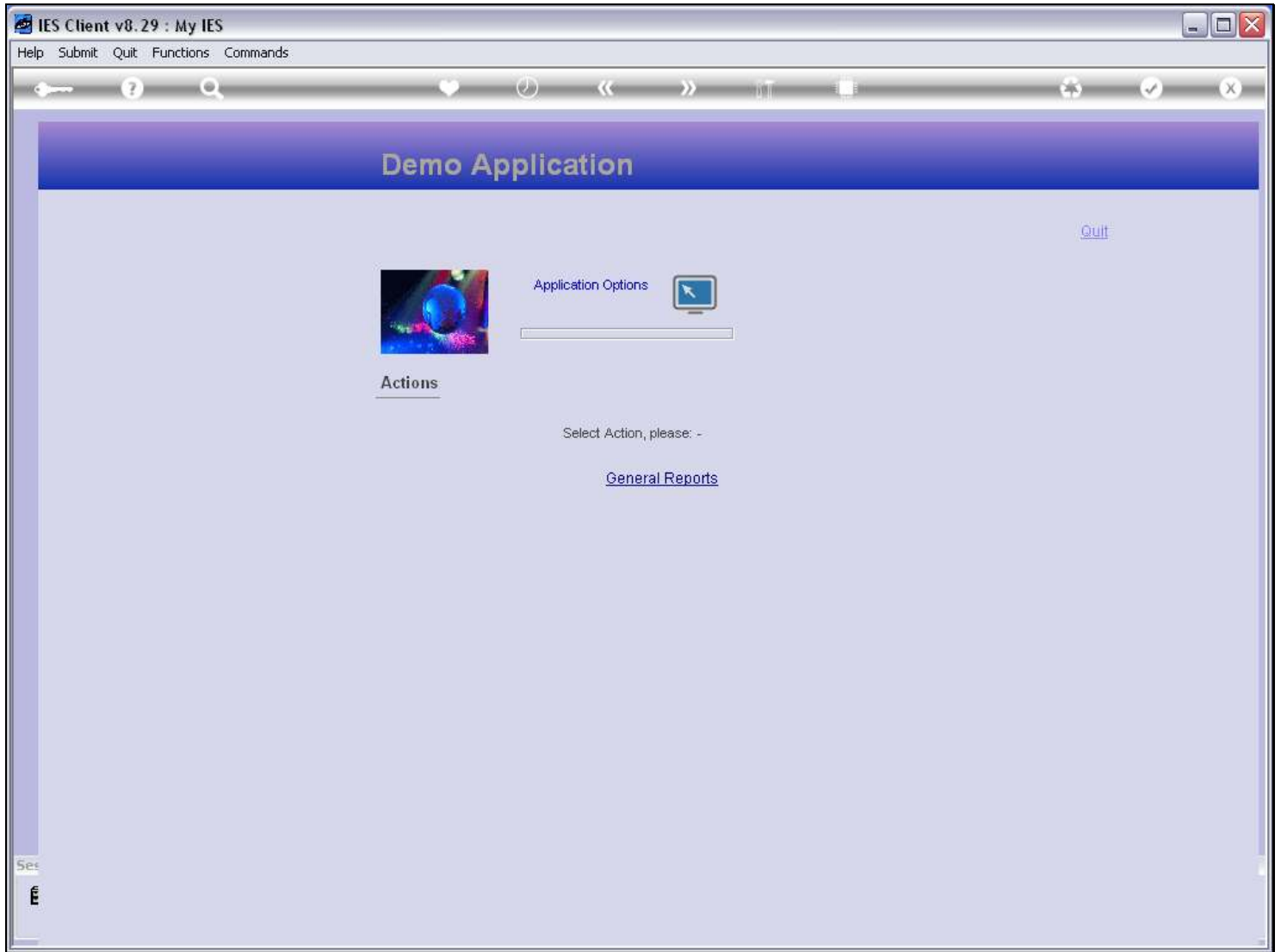
Slide 1 - Slide 1



Slide notes

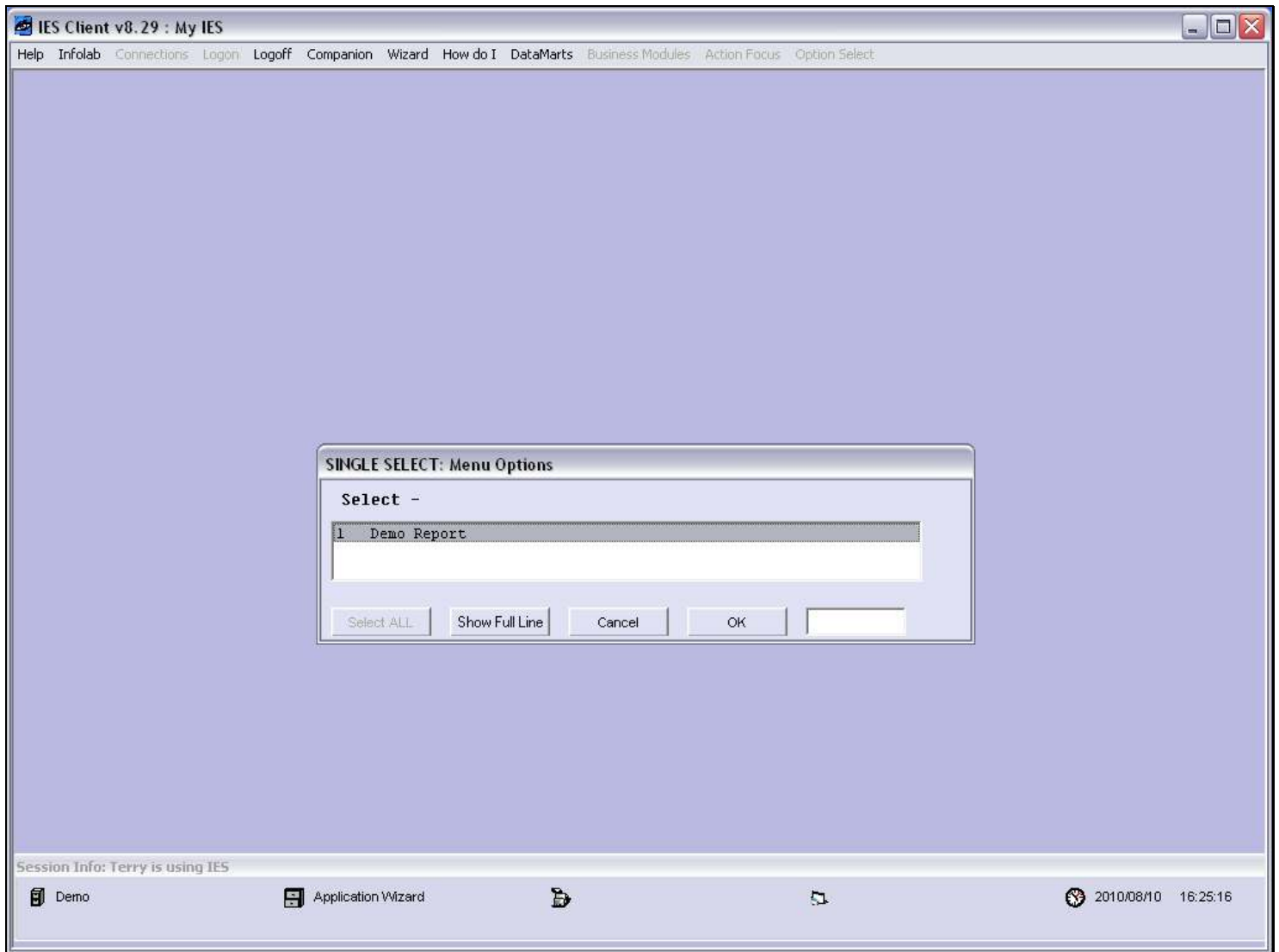
We are now going to see how we can add Period Mapping to a Quick Report. First, we test our Report and we show that there is no Period Mapping there at the moment.

## Slide 2 - Slide 2



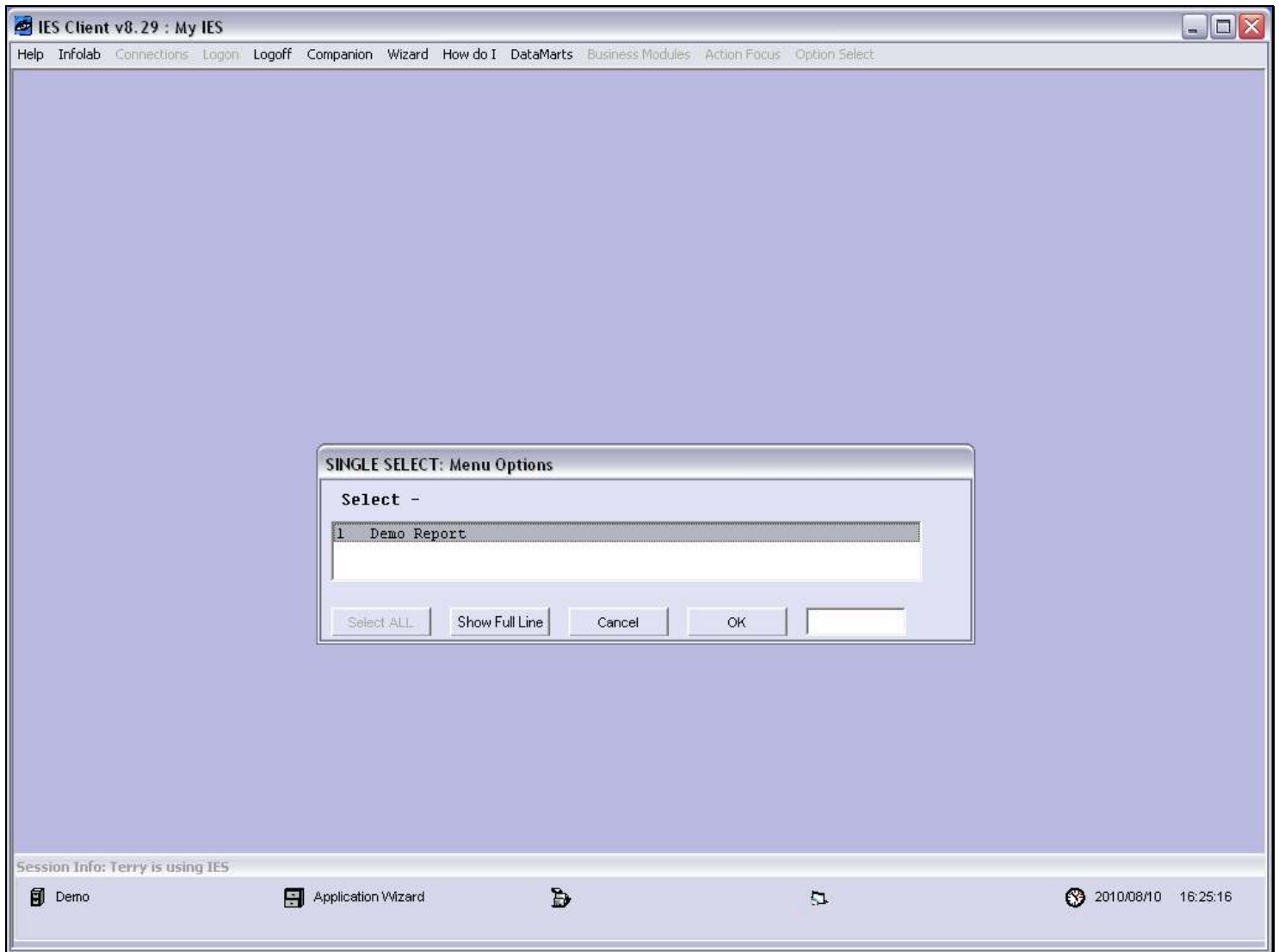
## Slide notes

### Slide 3 - Slide 3



### Slide notes

### Slide 4 - Slide 4



### Slide notes

## Slide 5 - Slide 5

IES Client v8.29 : My IES

Help Submit Quit Functions Commands

IES REPORTS AND QUERIES: - User Instructions

**NAME:** DEMO REPORT

**1: - CHOOSE VERSION** [Versions](#)

Report Version: System Version: Demo report

**2: - CHOOSE SETTINGS**

Format: report  
 OutPut: FILE  
 File Type: htm html file  
 Template: 05: Gummy Hoops Inc  
 Report Header: Demo report

**3: - CHOOSE DATA SELECTOR** [Change Selector](#)

Data Selector: fixed choice  
 atmast-2 WITH DESCRIPTION = ?

**4: - TO e-MAIL THE RESULTS** Priority: normal  
 Despatch By E-Mail Mail Drive \*

Mail To: Demo report  
 Mail Title: report by mail  
 Message Body: report by mail

**5: - ADAPT DATA SELECTION (if prompts are present)** [How to define MY CHOICE](#)

Selection Tip	My Choice
1 Description = ?	[ ]

Nex Pre Add Ins Ed Del

**6: - Record Select:**

OPEN Records only  
 CLOSED Records Only  
 EITHER

**7: - CHOOSE NEXT** [Next](#)

## Slide notes

The Report goes directly into the pre-run screen, without doing Period Mapping. What is Period Mapping? It is the ability for Reports to dynamically perform Views according to the Financial Period selection made by the User.

Slide 6 - Slide 6

**IES REPORTS AND QUERIES: - User Instructions**

**NAME:** DEMO REPORT

**1: - CHOOSE VERSION** [Versions](#)  
Report Version: System Version: Demo report

**2: - CHOOSE SETTINGS**  
Format: report  
OutPut: FILE  
File Type: htm html file  
Template: 05: Gummy Hoops Inc  
Report Header: Demo report

**3: - CHOOSE DATA SELECTOR** [Change Selector](#)  
Data Selector: fixed choice  
atmast-2 WITH DESCRIPTION = ?

**4: - TO e-MAIL THE RESULTS** Priority: normal  
 Despatch By E-Mail Mail Drive \*

Mail To: Demo report  
Mail Title: report by mail  
Message Body: report by mail

**5: - ADAPT DATA SELECTION (if prompts are present)** [How to define MY CHOICE](#)

Selection Tip	My Choice
1 Description = ?	[ ]

Nex Pre Add Ins Ed Del

**6: - Record Select:**  
 OPEN Records only  
 CLOSED Records Only  
 EITHER

**7: - CHOOSE NEXT** [Next](#)

Slide notes

Slide 7 - Slide 7

The screenshot shows the IES Client v8.29: My IES application window. The main area is titled "QUICK REPORTS". On the left, there is a form for report configuration with the following fields:

- Quick Report Key: MYDEMO
- \*Descr: Demo report
- Source Filename: atmast
- Heading: Demo report
- Header Subroutine:
- Footer Subroutine:

On the right side, there are several links for configuration: [Select DataNames](#), [Re-select Column Order](#), [Select Breaks](#), [Select Page Breaks](#), [Select Totals](#), [Select Sorts](#), [Select Data Selectors](#), and [Query Report Width](#). A "SAVE" button is also present.

Below the configuration form, there are four main sections for report options, each with a list of items and a vertical scrollbar:

- Data Names:** 1 MKEY, 2 DESCR, 3 ACT-PTD
- Breaks:** 1
- Page Breaks:** 1
- Totals:** 1

At the bottom, there are two more sections:

- Sort By:** Dsmd / Exp, 1 DESCR
- Data Selector(s):** 1 atmast-2 WITH DESCRIPTION = ?

On the far right, there are additional options:

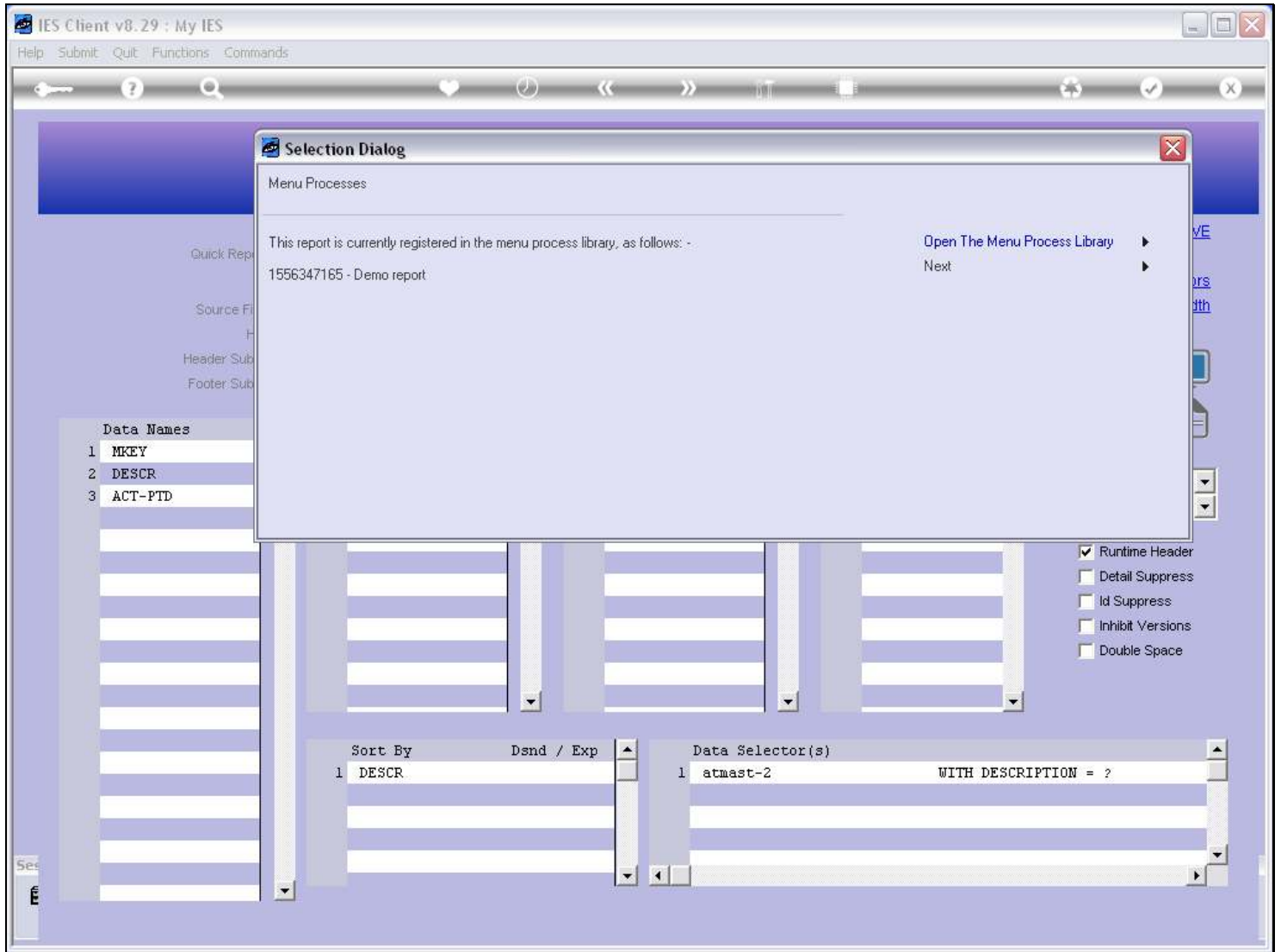
- Verb: list
- Type: 2: Rep / Qty
- Runtime Header
- Detail Suppress
- Id Suppress
- Inhibit Versions
- Double Space

Slide notes

Back at our Quick Report, we use the Publication options.



Slide 8 - Slide 8

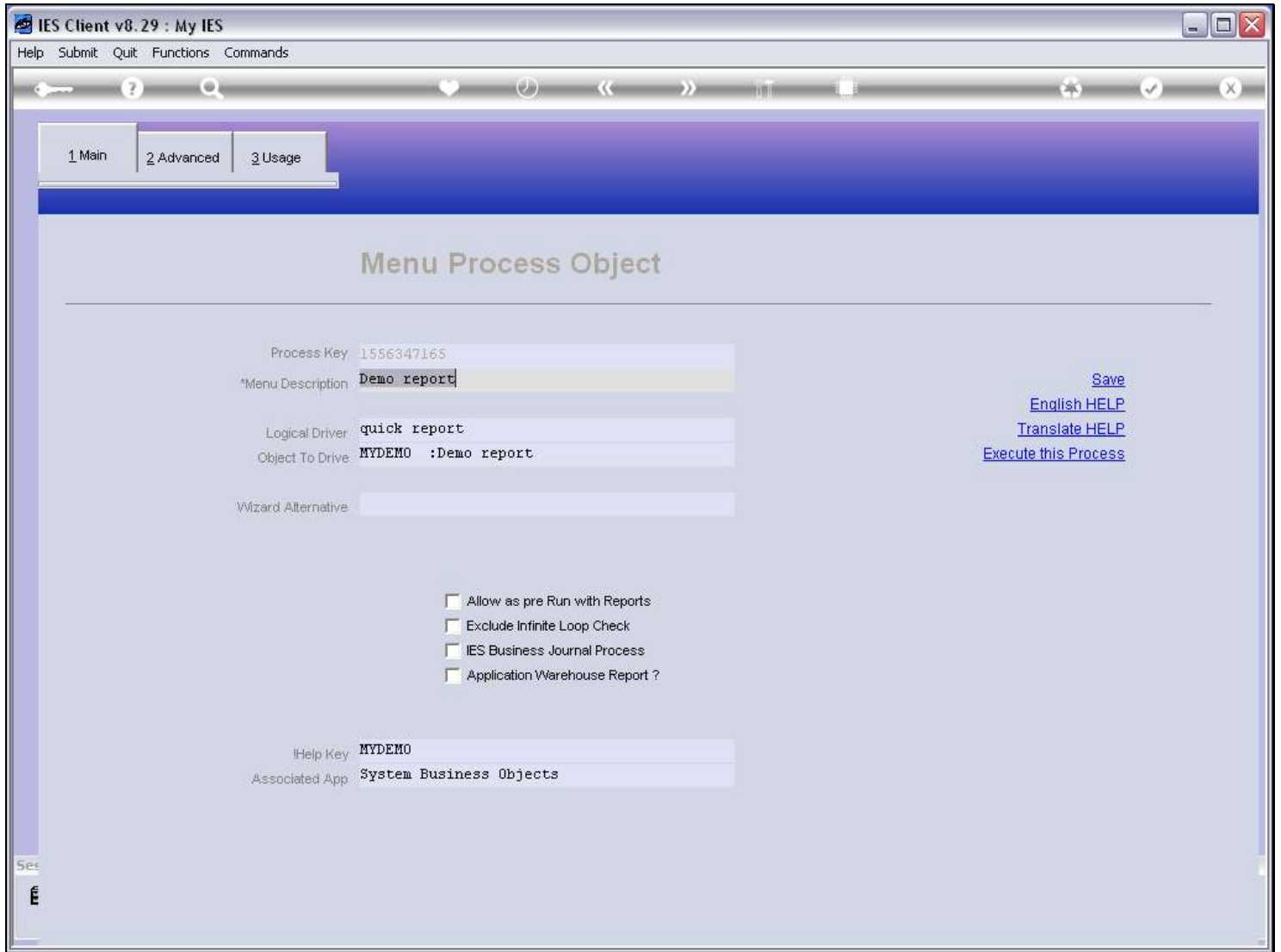


Slide notes

And we enter the Menu process previously created for this Report.

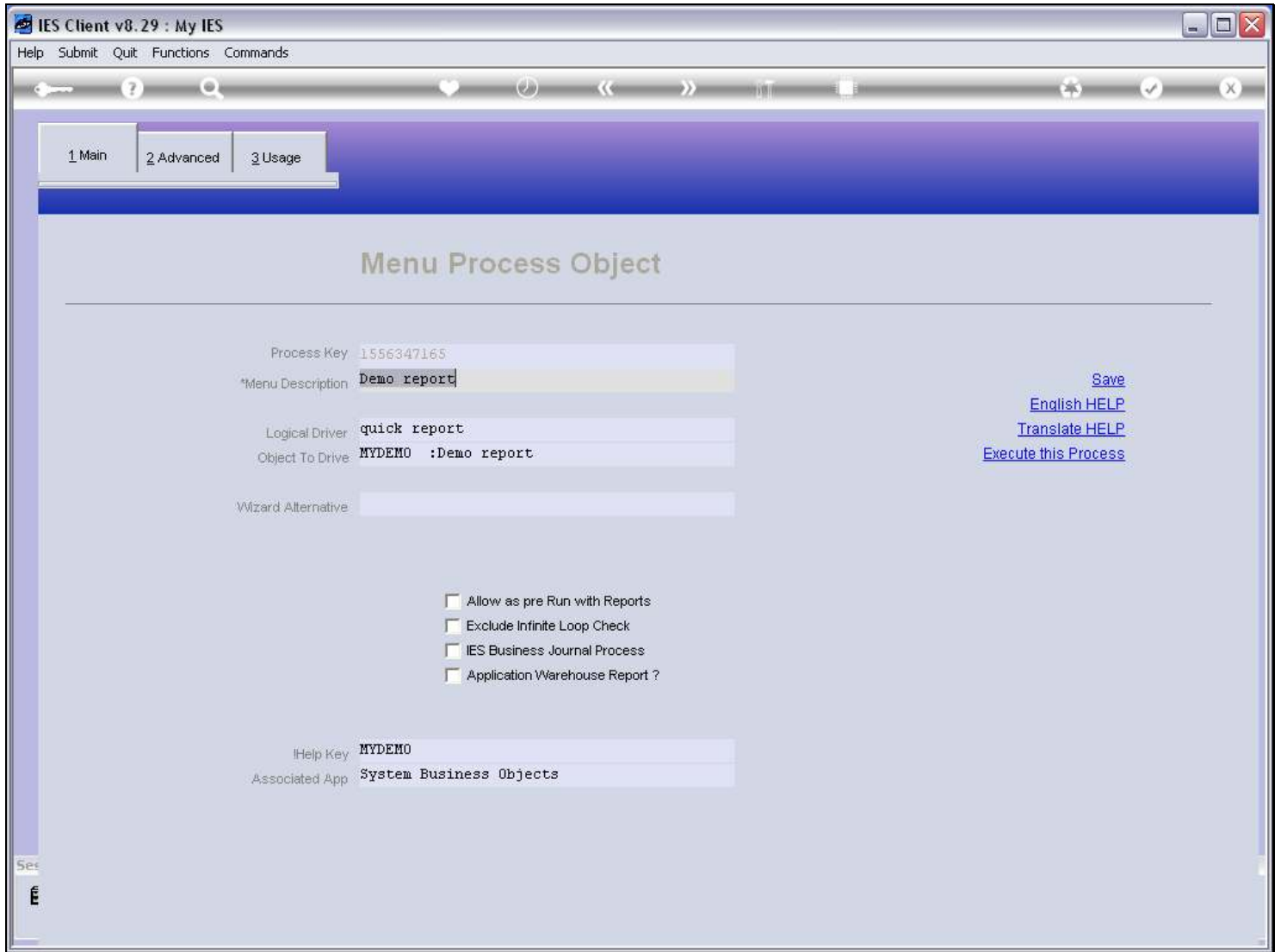


Slide 9 - Slide 9



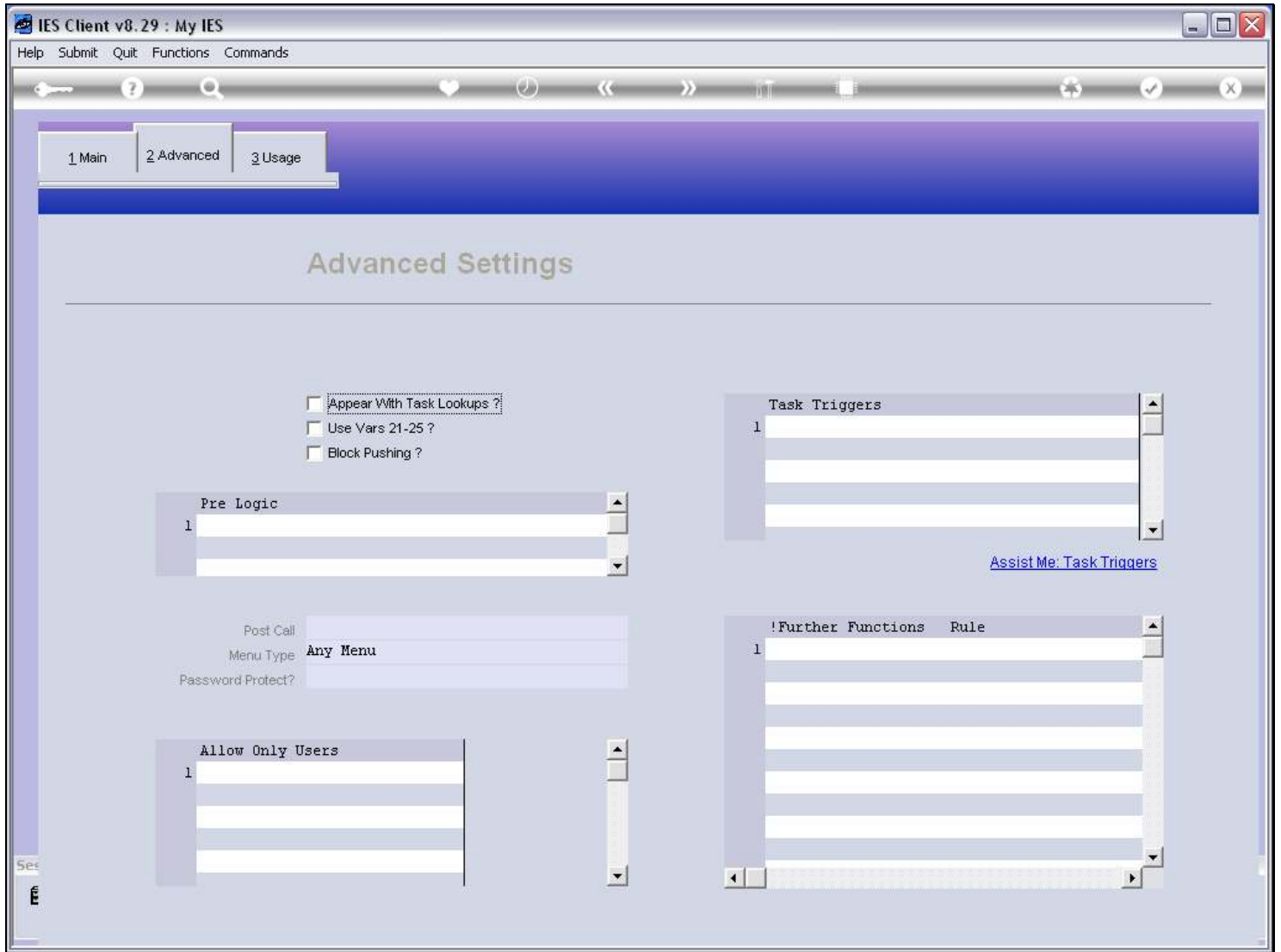
Slide notes

### Slide 10 - Slide 10



### Slide notes

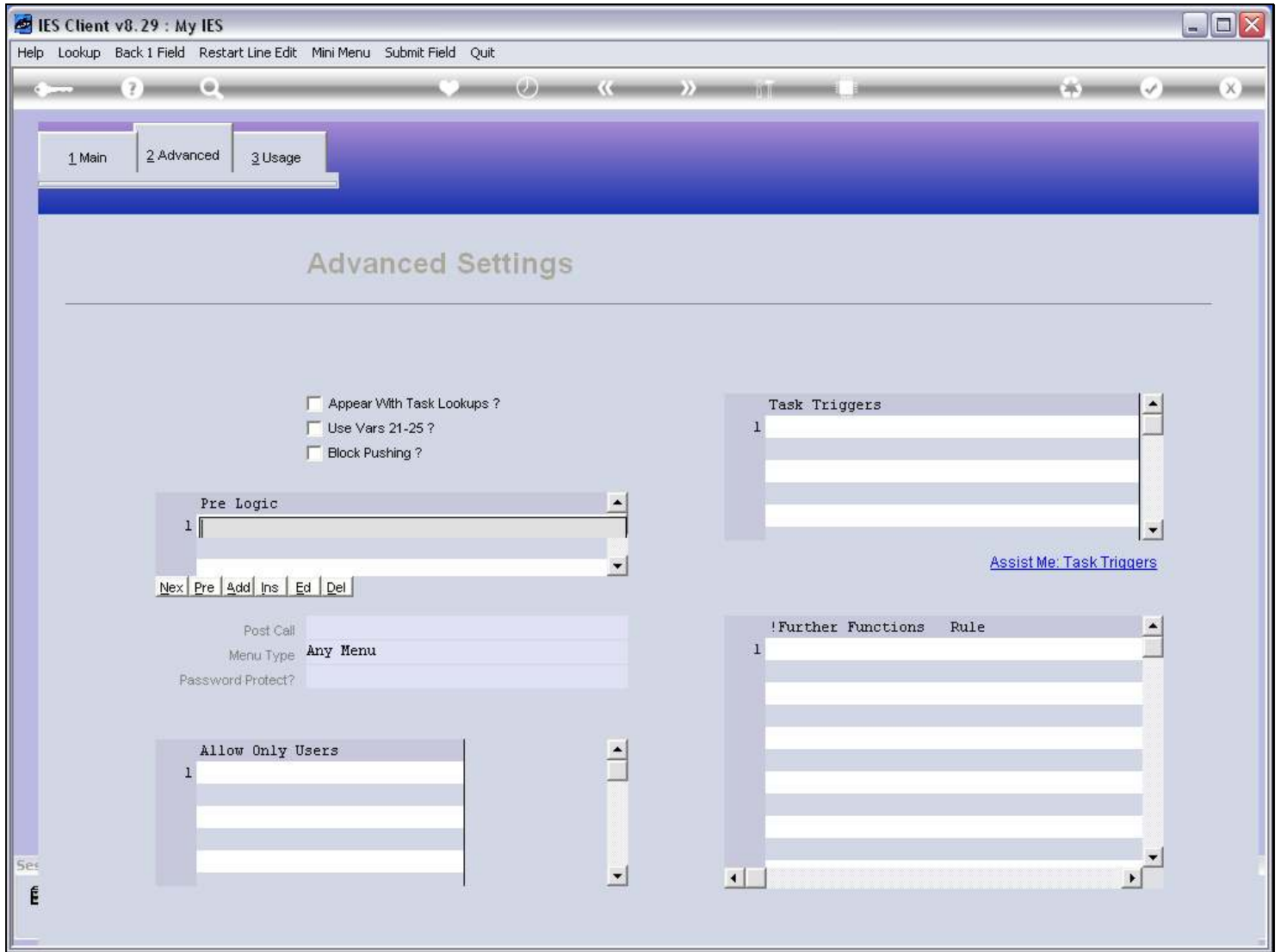
Slide 11 - Slide 11



Slide notes

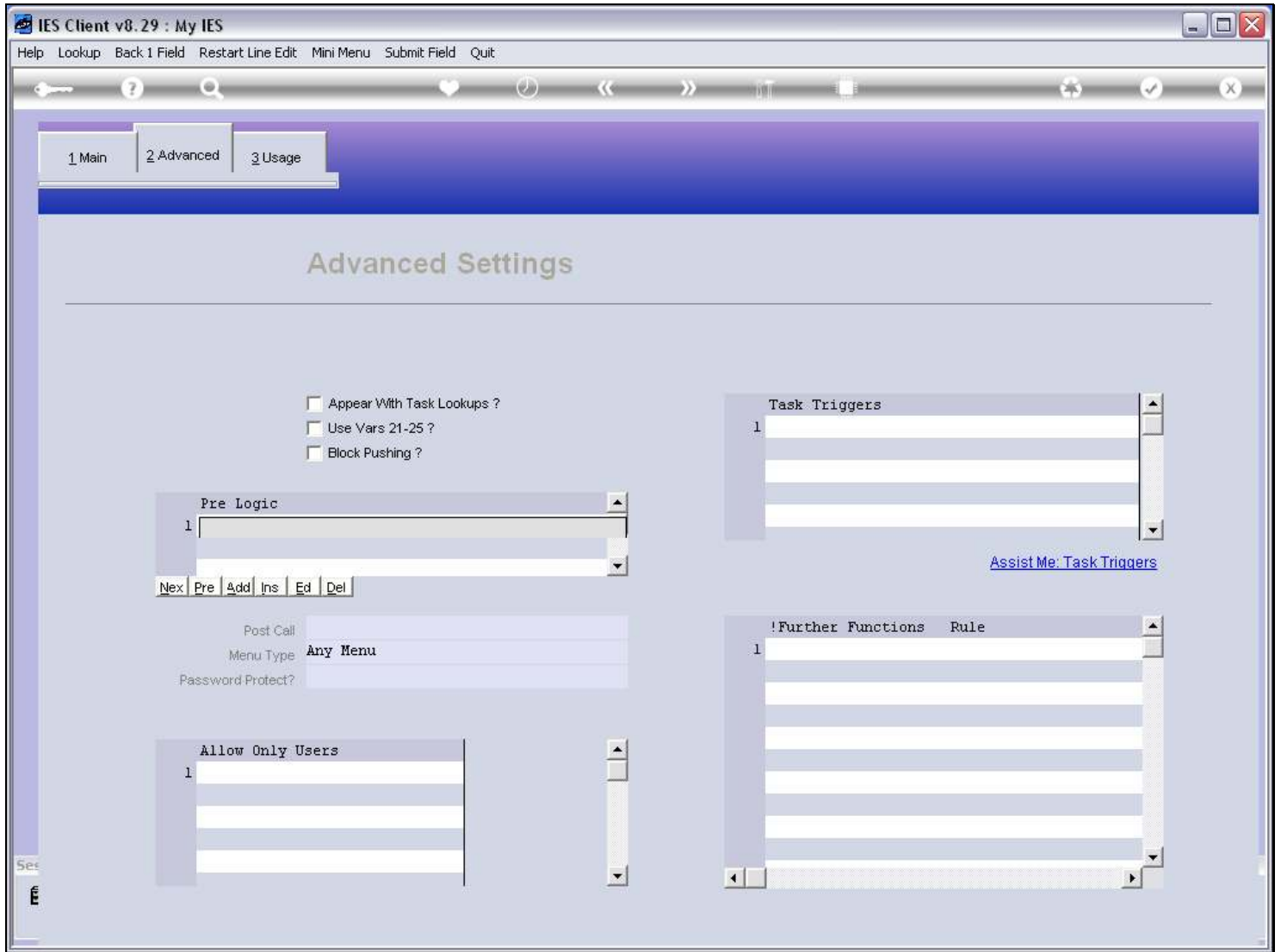
At 'pre logic', we add the 'umappers.in' command.

### Slide 12 - Slide 12



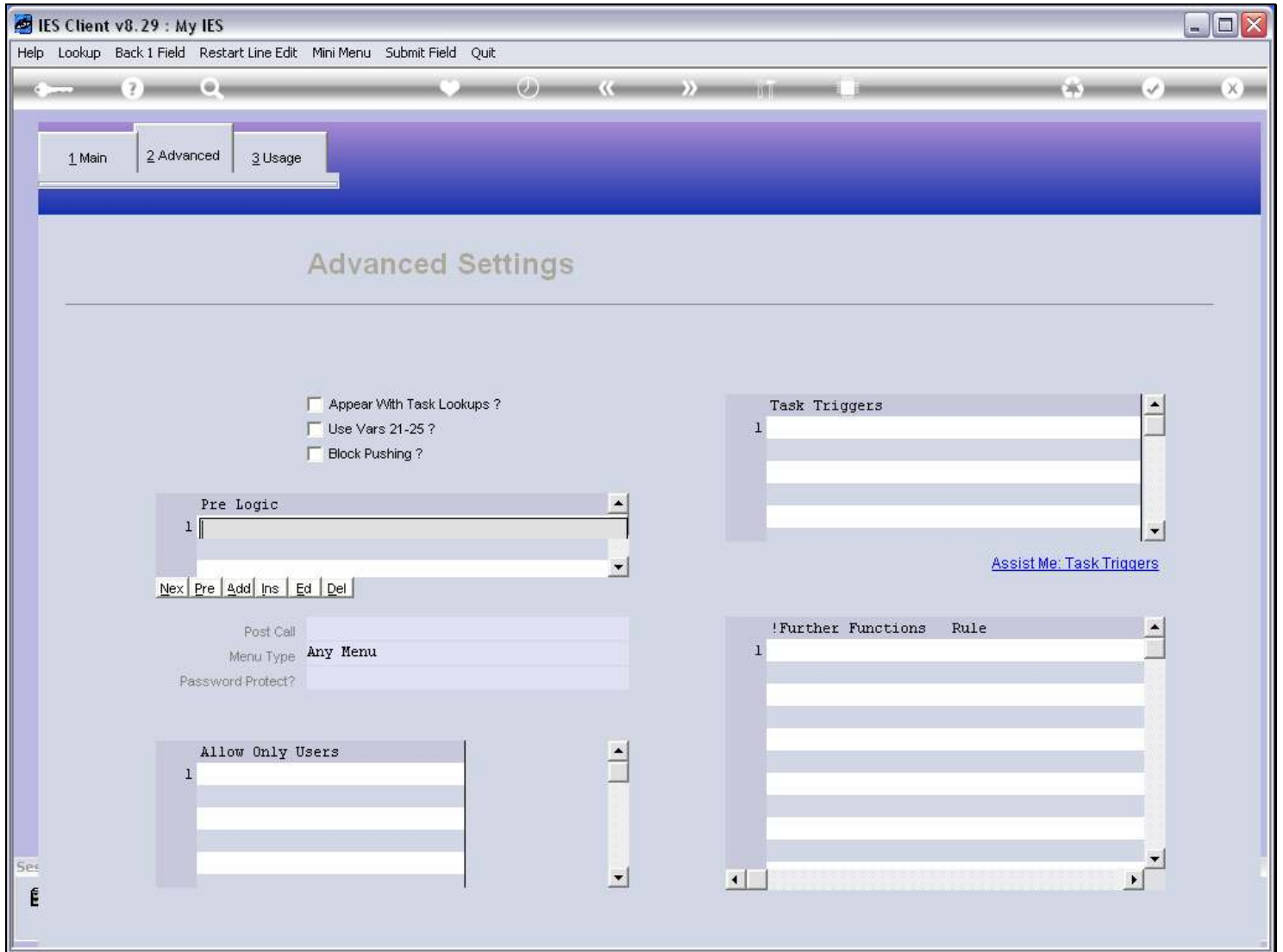
### Slide notes

Slide 13 - Slide 13



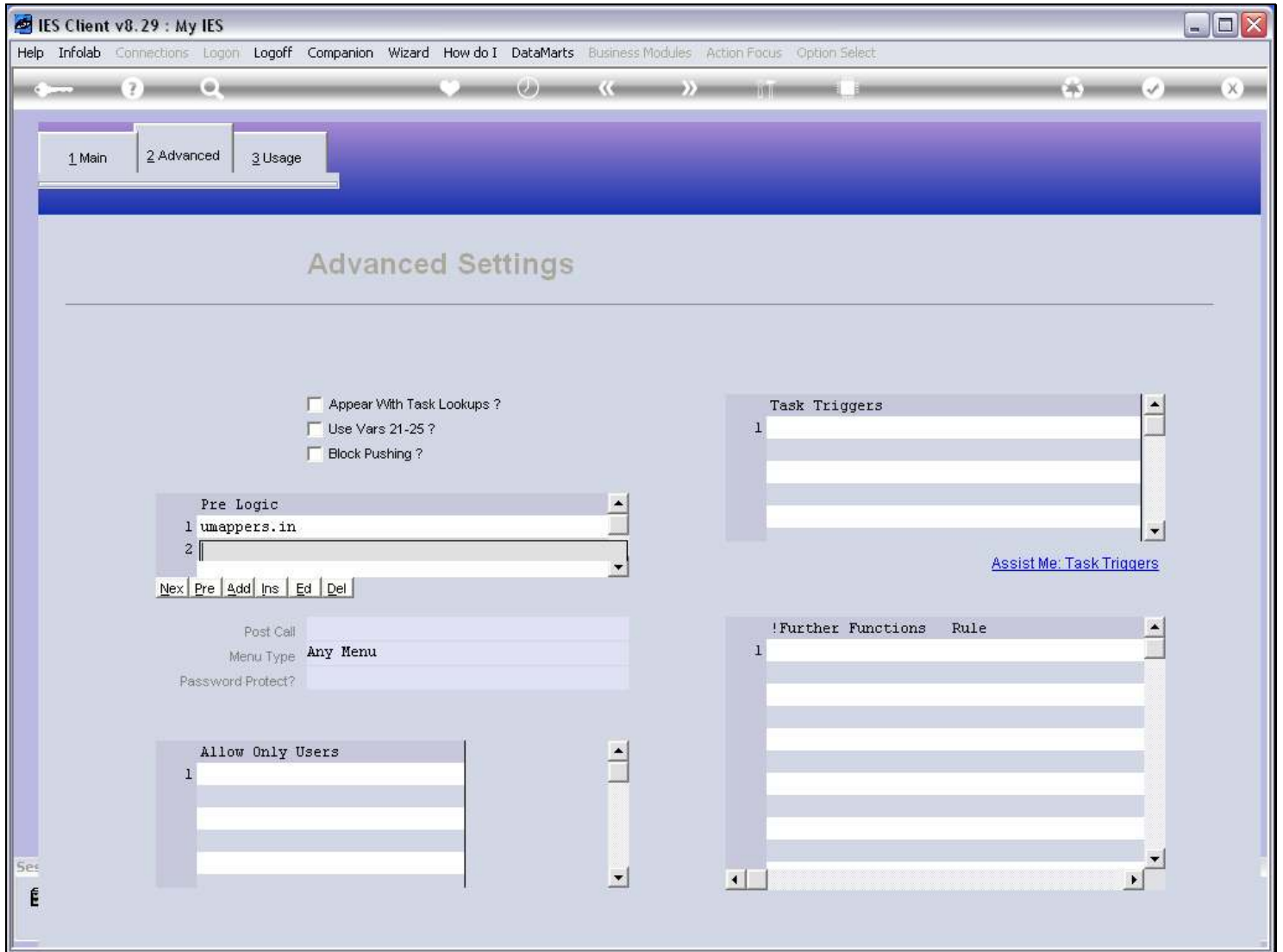
Slide notes

Slide 14 - Slide 14



Slide notes

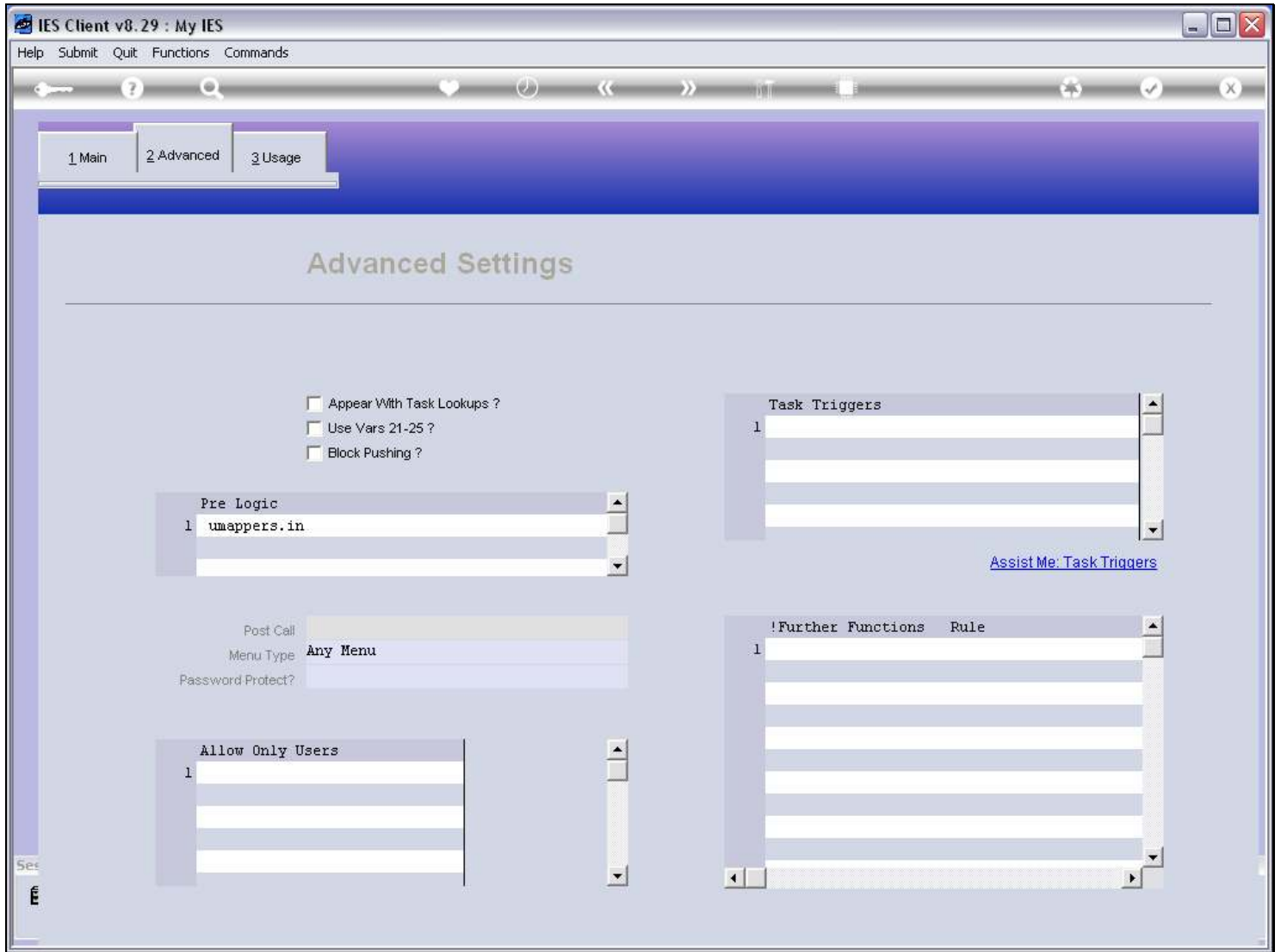
Slide 15 - Slide 15



Slide notes



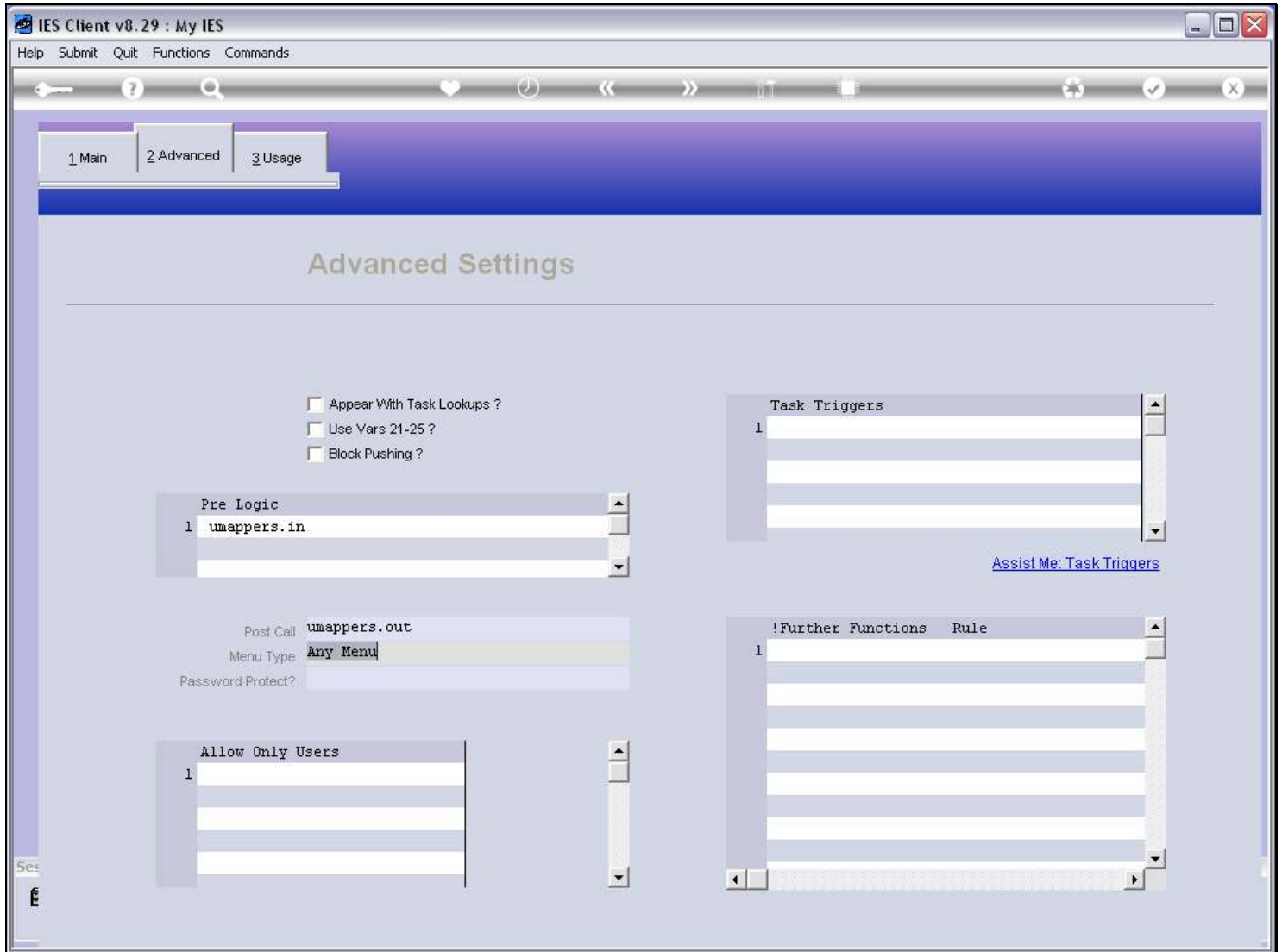
Slide 16 - Slide 16



Slide notes

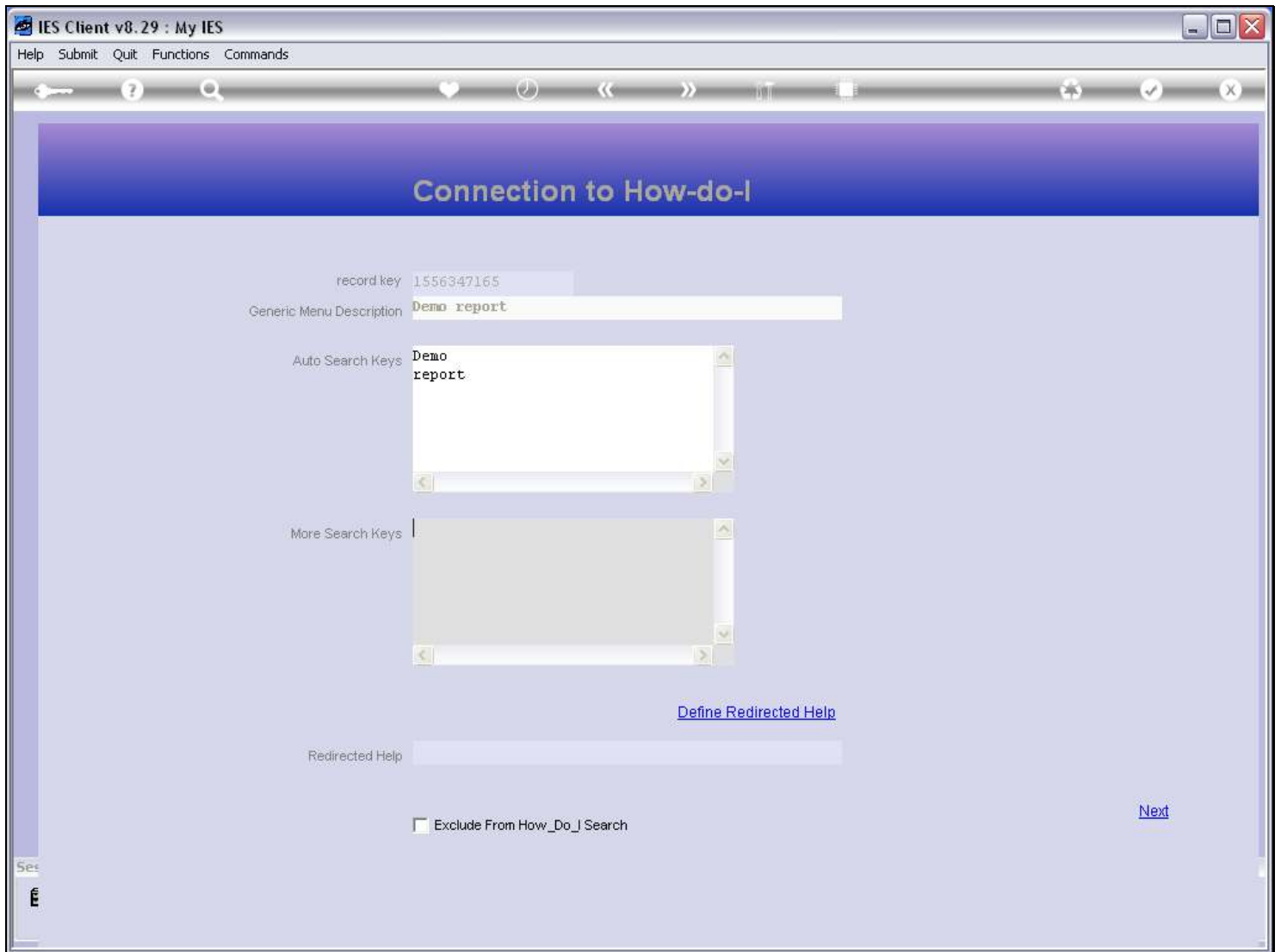
And at 'post call' we add the 'umappers.out' command. Then we save the Process entry again.

### Slide 17 - Slide 17



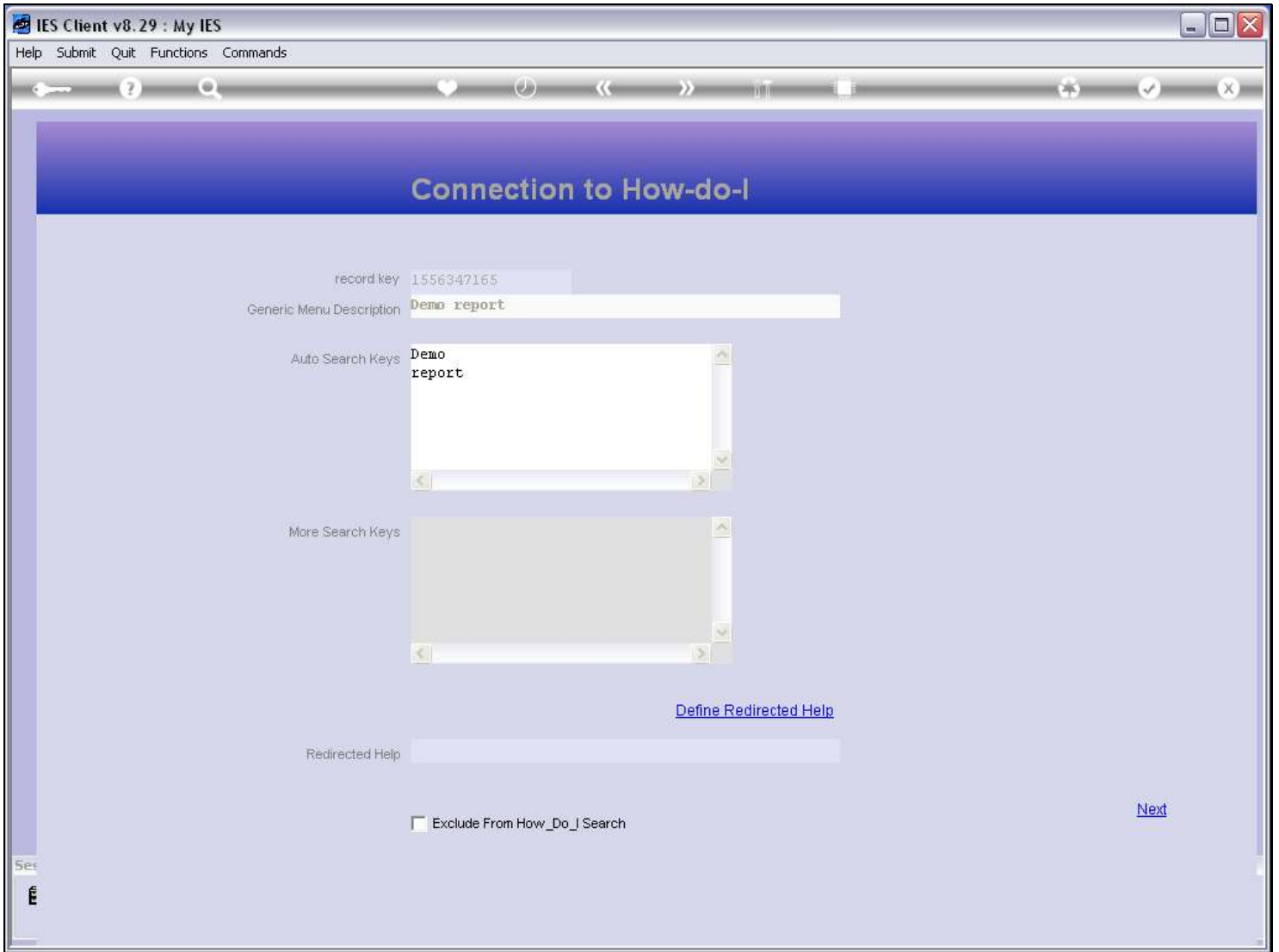
### Slide notes

Slide 18 - Slide 18



Slide notes

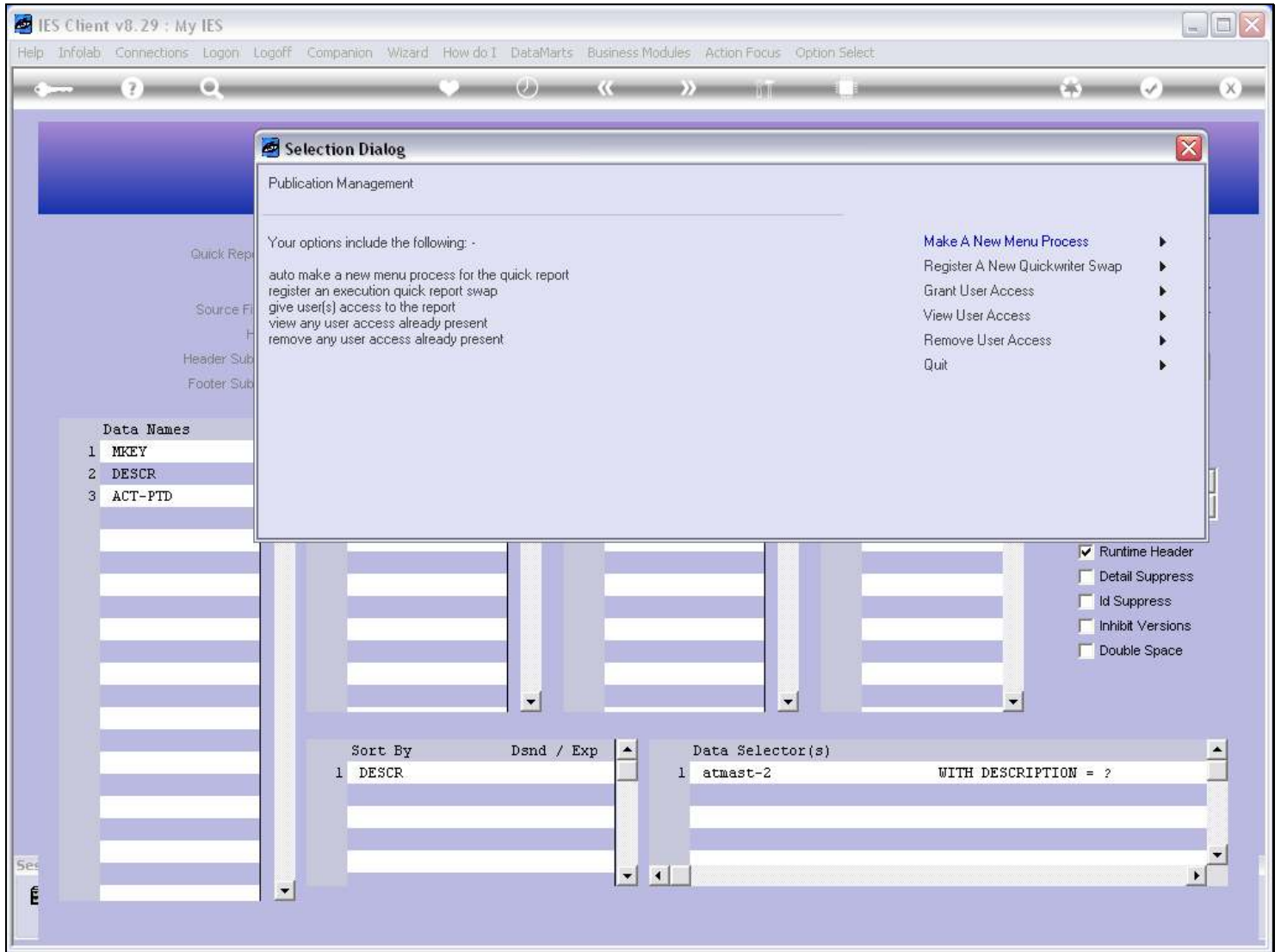
Slide 19 - Slide 19



Slide notes



Slide 21 - Slide 21



Slide notes

Slide 22 - Slide 22

Slide notes

Now we are ready to test, but we cannot use the local QuickWriter test option, because that will only test the Report itself. In this case, we need to run the report from the Menu Library to test the Period Mapping.



### Slide 23 - Slide 23

The screenshot shows the IES Client v8.29: My IES application window. The title bar includes menu items: Help, Infolab, Connections, Logon, Logoff, Companion, Wizard, How do I, DataMarts, Business Modules, Action Focus, and Option Select. Below the title bar is a toolbar with icons for search, help, home, back, forward, refresh, and close. The main content area has a blue header with the text "System Business Objects". Below the header, there is a paragraph: "Business Objects are the elements that we put together intelligently to produce a great system ...". To the right of this text is a puzzle piece icon and the text "Knowledge Base". To the right of the text is a large image of a cube made of puzzle pieces. Below the paragraph, there are six categories of business objects, each with a puzzle piece icon and a list of sub-items: "Report Writing: -" (DocWriter, QuickWriter, PrintWriter, Other Options), "Primary Objects: -" (Objects, Actions, Periodic Updates, Data Imports), "Most Popular Objects: -" (Dictionaries, Screens, Files, Menus, Data Selectors), "Reports: -" (Object Reports, Dev Reports), "Programs and Coding: -" (Programs), and "Custom Options: -" (Custom Options). The bottom left corner of the window shows a search bar with the text "Sec" and a magnifying glass icon.

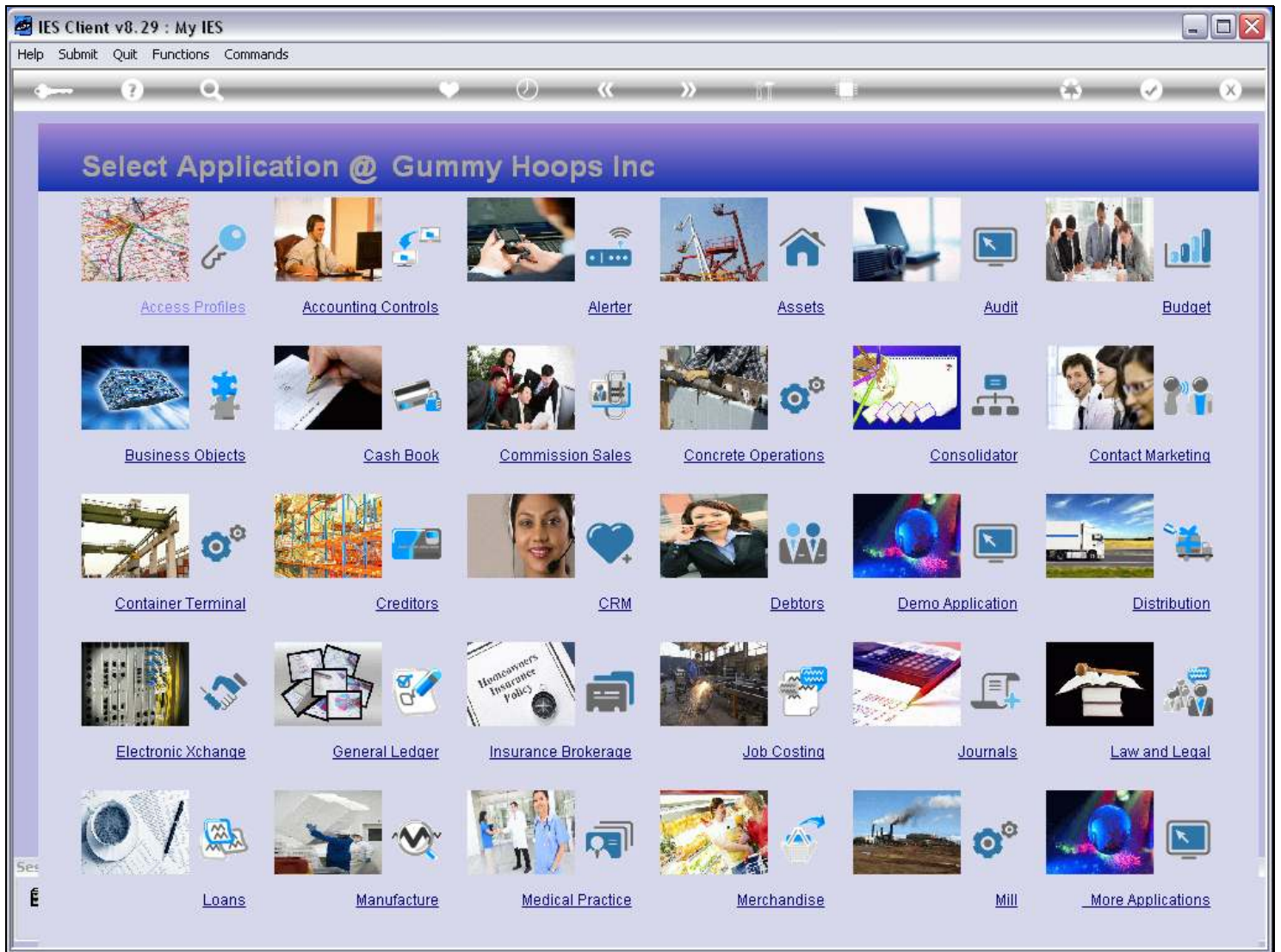
### Slide notes

Slide 24 - Slide 24

The screenshot shows the IES Client v8.29: My IES interface. The title bar includes menu items: Help, Infolab, Connections, Logon, Logoff, Companion, Wizard, How do I, DataMarts, Business Modules, Action Focus, and Option Select. The main content area is titled "System Business Objects" and features a blue header bar. Below the header, there is a central text block: "Business Objects are the elements that we put together intelligently to produce a great system ...". To the right of this text is a "Knowledge Base" link with a puzzle piece icon. Further right is a 3D cube graphic composed of many small images. Below the main text, there are six categories of objects, each with a puzzle piece icon and a list of links: "Report Writing: -" (DocWriter, QuickWriter, PrintWriter, Other Options), "Primary Objects: -" (Objects, Actions, Periodic Updates, Data Imports), "Most Popular Objects: -" (Dictionaries, Screens, Files, Menus, Data Selectors), "Reports: -" (Object Reports, Dev Reports), "Programs and Coding: -" (Programs), and "Custom Options: -" (Custom Options). The interface has a light blue background and a standard Windows-style window border.

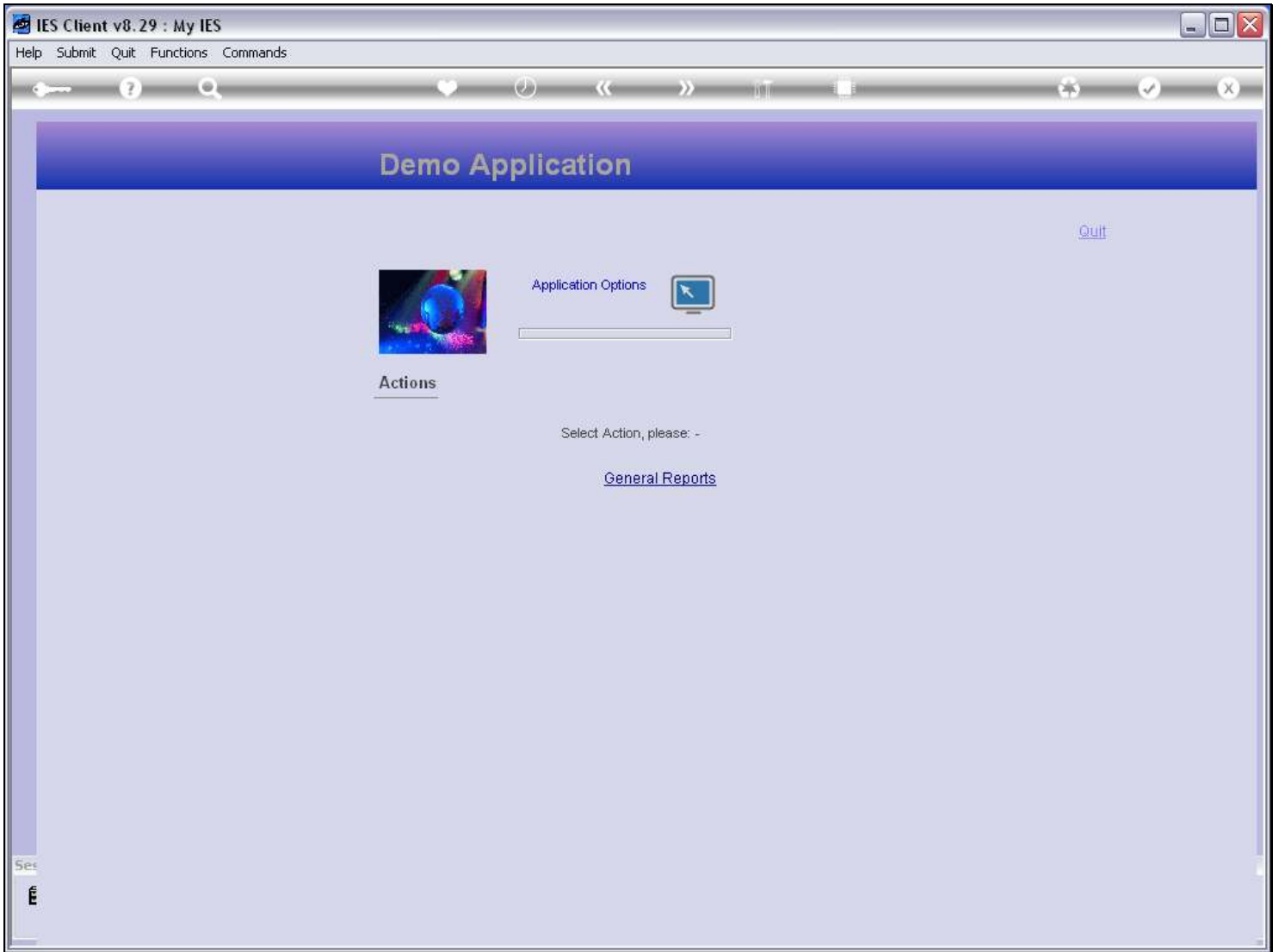
Slide notes

Slide 25 - Slide 25



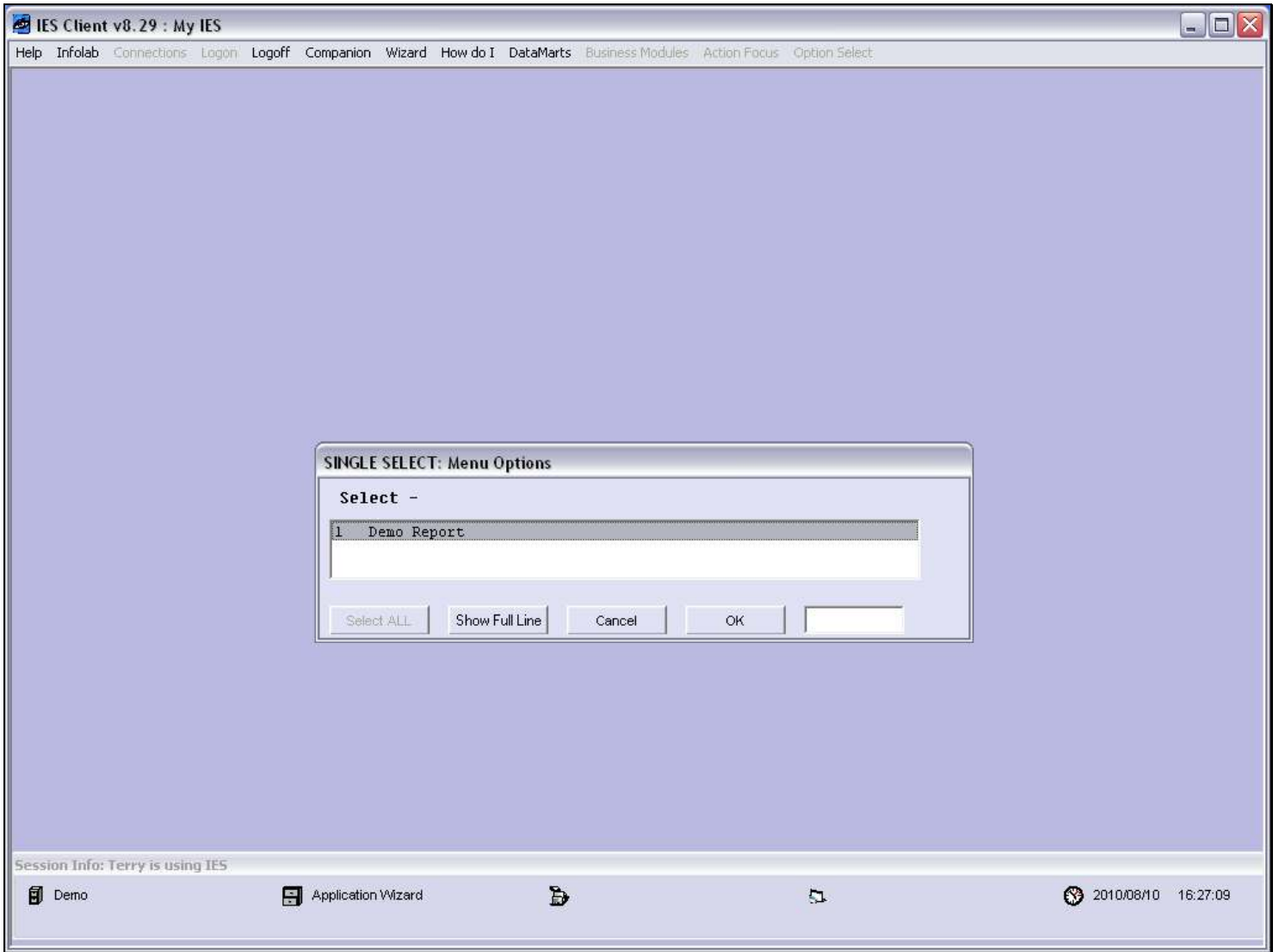
Slide notes

Slide 26 - Slide 26



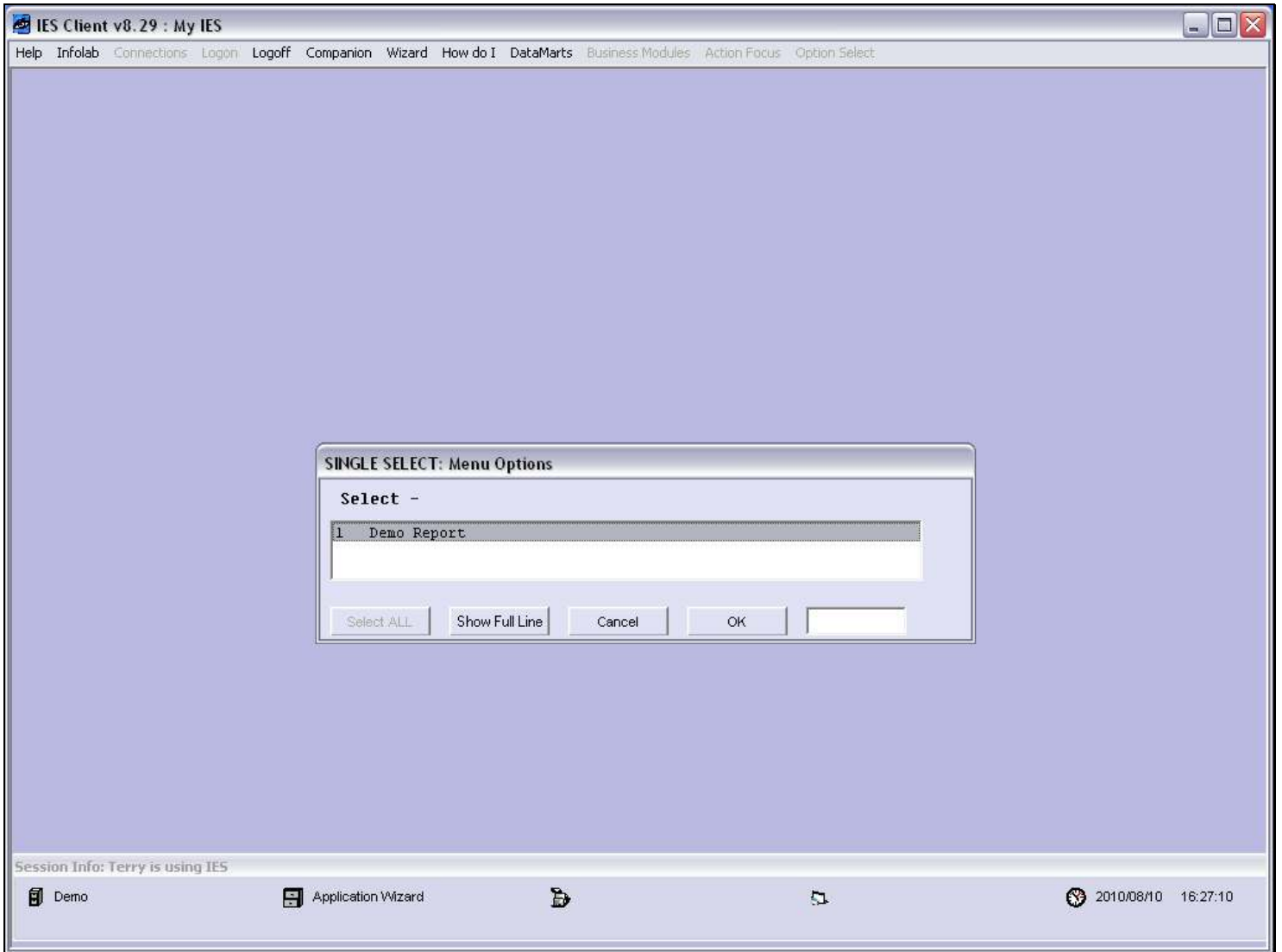
Slide notes

Slide 27 - Slide 27



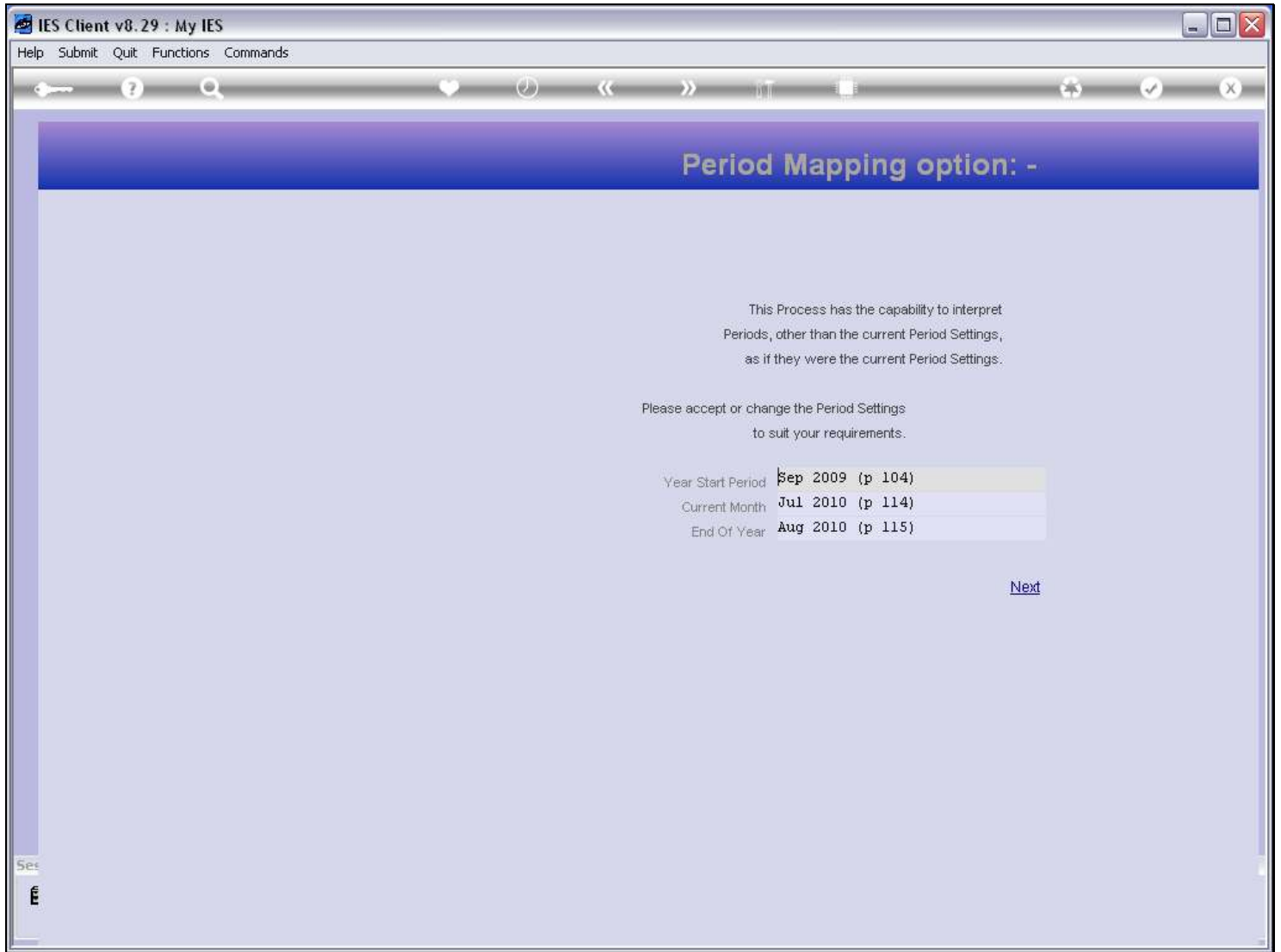
Slide notes

### Slide 28 - Slide 28



### Slide notes

Slide 29 - Slide 29

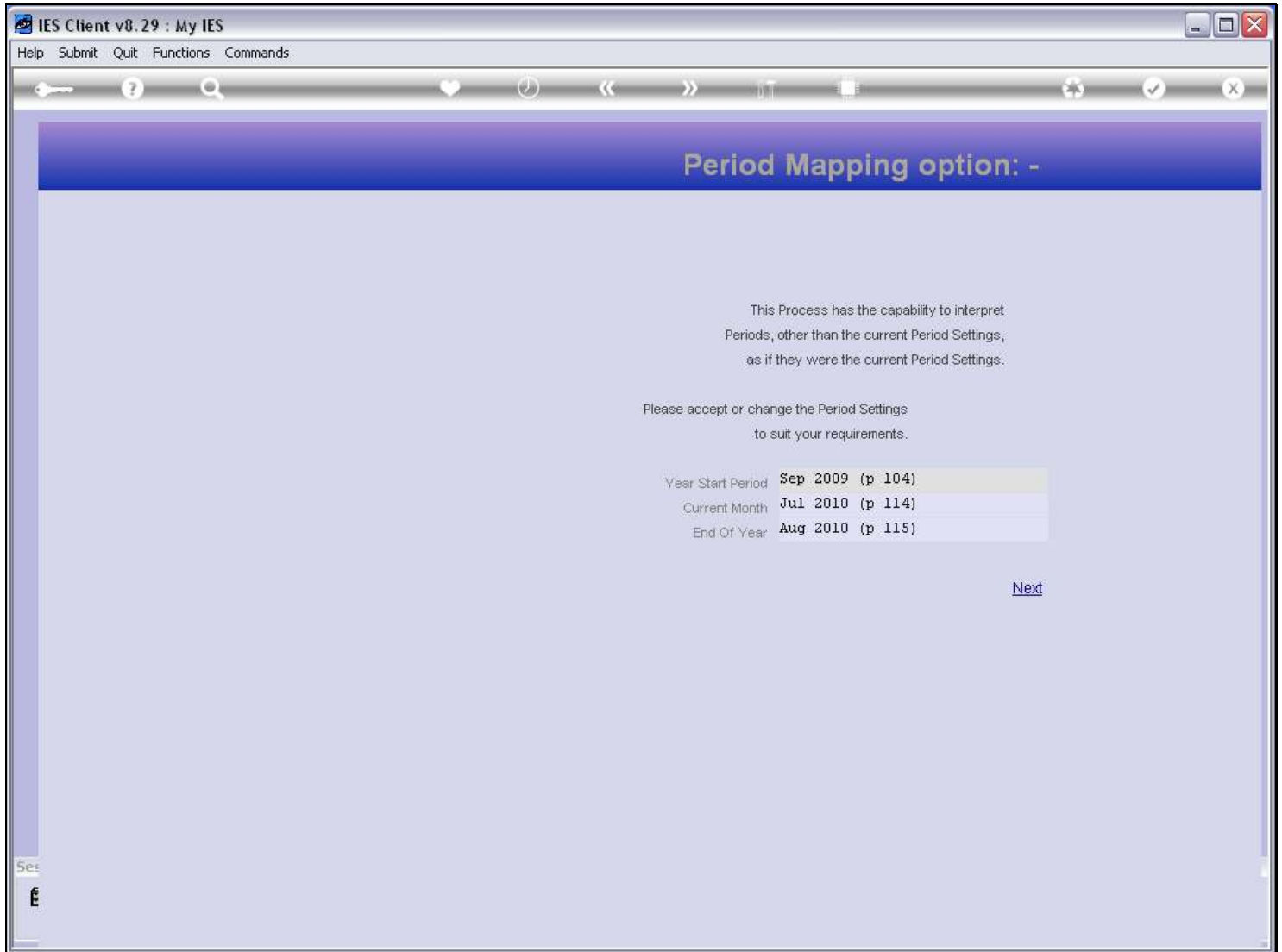


Slide notes

And this time we have the Period Mapping step. Now our report is more powerful, and the User can choose each time for which Periods to perform the Report.



Slide 30 - Slide 30



Slide notes

Slide 31 - Slide 31

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' and contains several numbered steps:

- NAME:** DEMO REPORT
- 1: - CHOOSE VERSION** (with a [Versions](#) link). Report Version: System Version: Demo report
- 2: - CHOOSE SETTINGS**. Format: report, OutPut: FILE, File Type: htm html file, Template: 05: Gummy Hoops Inc, Report Header: Demo report
- 3: - CHOOSE DATA SELECTOR** (with a [Change Selector](#) link). Data Selector: fixed choice, atmast-2 WITH DESCRIPTION = ?
- 4: - TO e-MAIL THE RESULTS** (with a [Priority](#) dropdown set to normal).  Despatch By E-Mail, Mail Drive: \*. Mail To: Demo report, Mail Title: report by mail, Message Body: report by mail
- 5: - ADAPT DATA SELECTION (if prompts are present)** (with a [How to define MY CHOICE](#) link). A table below shows:

Selection Tip	My Choice
1 Description = ?	[ ]

Buttons: Nex, Pre, Add, Ins, Ed, Del
- 6: - Record Select:**  OPEN Records only,  CLOSED Records Only,  EITHER
- 7: - CHOOSE NEXT** (with a [Next](#) link)

Slide notes

Slide 32 - Slide 32

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 contains several numbered steps:

- 1: - CHOOSE VERSION** (with a [Versions](#) link). The 'Report Version' field is set to 'System Version: Demo report'.
- 2: - CHOOSE SETTINGS**. Fields include: 'Format' (report), 'OutPut' (FILE), 'File Type' (htm html file), 'Template' (05: Gummy Hoops Inc), and 'Report Header' (Demo report).
- 3: - CHOOSE DATA SELECTOR** (with a [Change Selector](#) link). The 'Data Selector' field is 'atmast-2 WITH DESCRIPTION = ?'.
- 4: - TO e-MAIL THE RESULTS**. Includes 'Priority' (normal), a checkbox for 'Despatch By E-Mail', 'Mail To' (Demo report), 'Mail Title' (report by mail), and 'Message Body'.
- 5: - ADAPT DATA SELECTION (if prompts are present)** (with a [How to define MY CHOICE](#) link). A table shows 'Selection Tip' and 'My Choice'.

Selection Tip	My Choice
1 Description = ?	[ ]

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' (selected).
- 7: - CHOOSE NEXT** (with a [Next](#) link).

Slide notes

Slide 33 - Slide 33

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 contains several numbered steps:

- NAME:** DEMO REPORT
- 1: - CHOOSE VERSION** (with a [Versions](#) link). Report Version: System Version: Demo report
- 2: - CHOOSE SETTINGS**. Format: report, OutPut: FILE, File Type: htm html file, Template: 05: Gummy Hoops Inc, Report Header: Demo report
- 3: - CHOOSE DATA SELECTOR** (with a [Change Selector](#) link). Data Selector: fixed choice, atmast-2 WITH DESCRIPTION = ?
- 4: - TO e-MAIL THE RESULTS**. Priority: normal,  Despatch By E-Mail, Mail Drive: \*. Mail To: Demo report, Mail Title: report by mail, 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' is shown:

Selection Tip	My Choice
1 Description = ?	[ ]

Buttons: Nex, Pre, Add, Ins, Ed, Del.
- 6: - Record Select:**  OPEN Records only,  CLOSED Records Only,  EITHER
- 7: - CHOOSE NEXT** (with a [Next](#) link)

Slide notes