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IES Client v8.29 : My IES

Help Submit Quit Functions Commands

IES REPORTS AND QUERIES: - User Instructions

NAME: CREDITOR LISTING (NAME AND CODE ONLY)

1: - CHOOSE VERSION [Versions](#)

Report Version: system version: AP / Creditor Accounts Listing

2: - CHOOSE SETTINGS

Format: report
 OutPut: FILE
 File-Type: txt text file
 Template: 04: Infolab
 Report Header: AP / Creditor Accounts Listing

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

choose from 6 data selectors
 Data Selector: cred-open OPEN CREDITORS

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

Mail To:
 Mail Title: Creditor Listing (name and code only)
 Message Body: report by mail

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

Selection Tip	My Choice
1 Group No =	[]

Nex Pre Add Ins Ed Del

6: - Record Select:

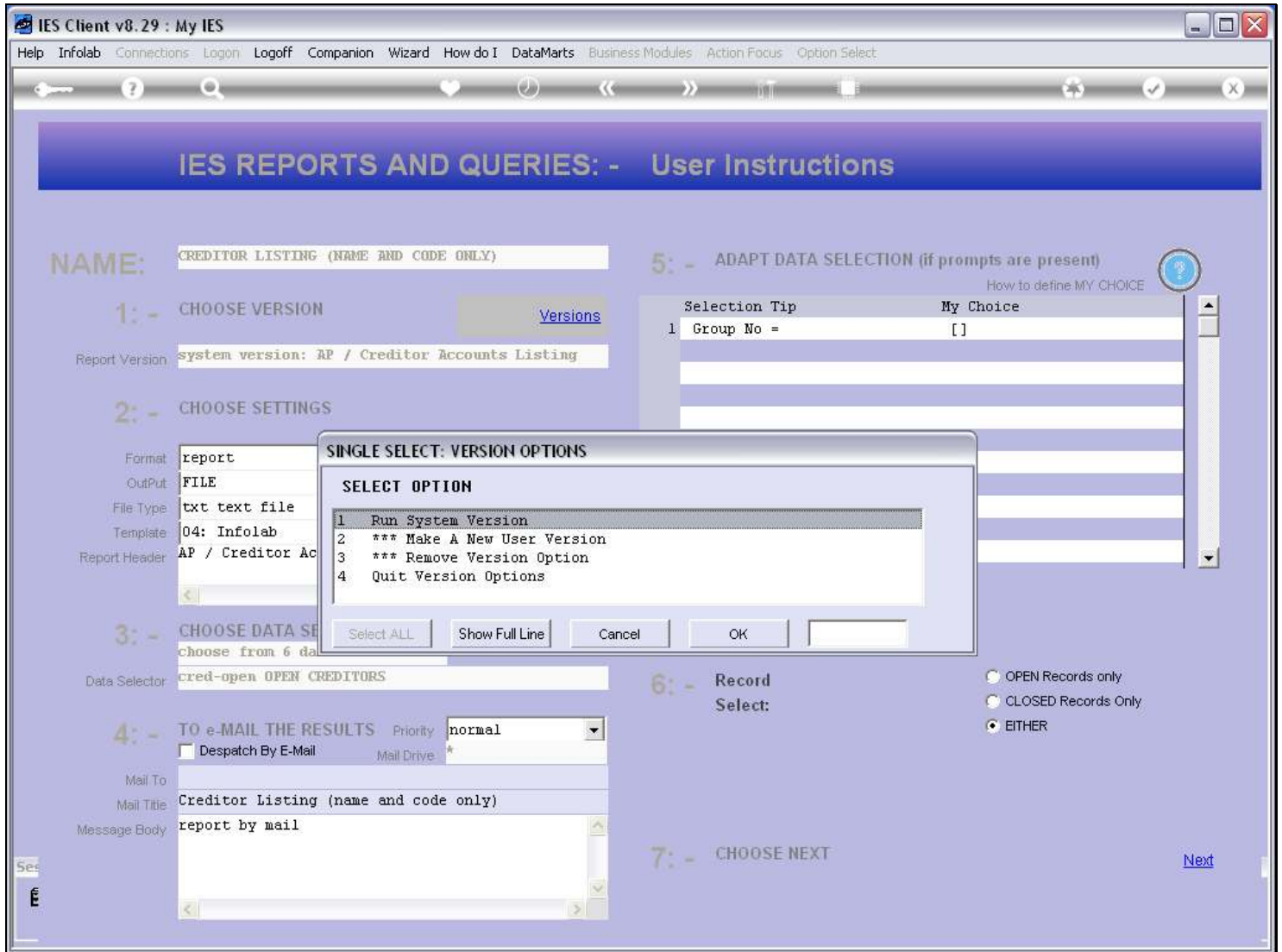
OPEN Records only
 CLOSED Records Only
 EITHER

7: - CHOOSE NEXT [Next](#)

Slide notes

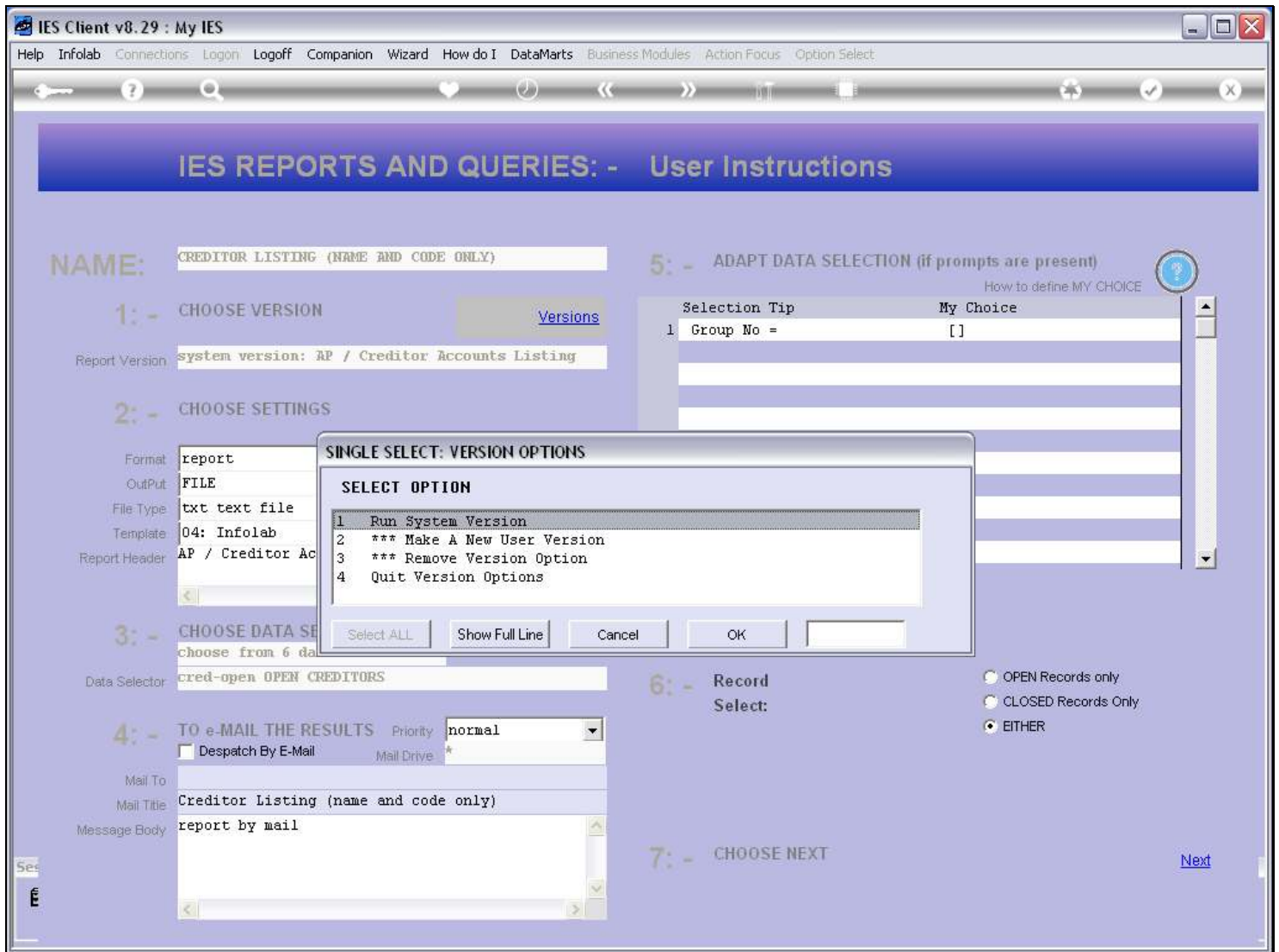
How do we make a new User Version of a Report? We choose 'versions' at the run-time screen, and then make our new Report.

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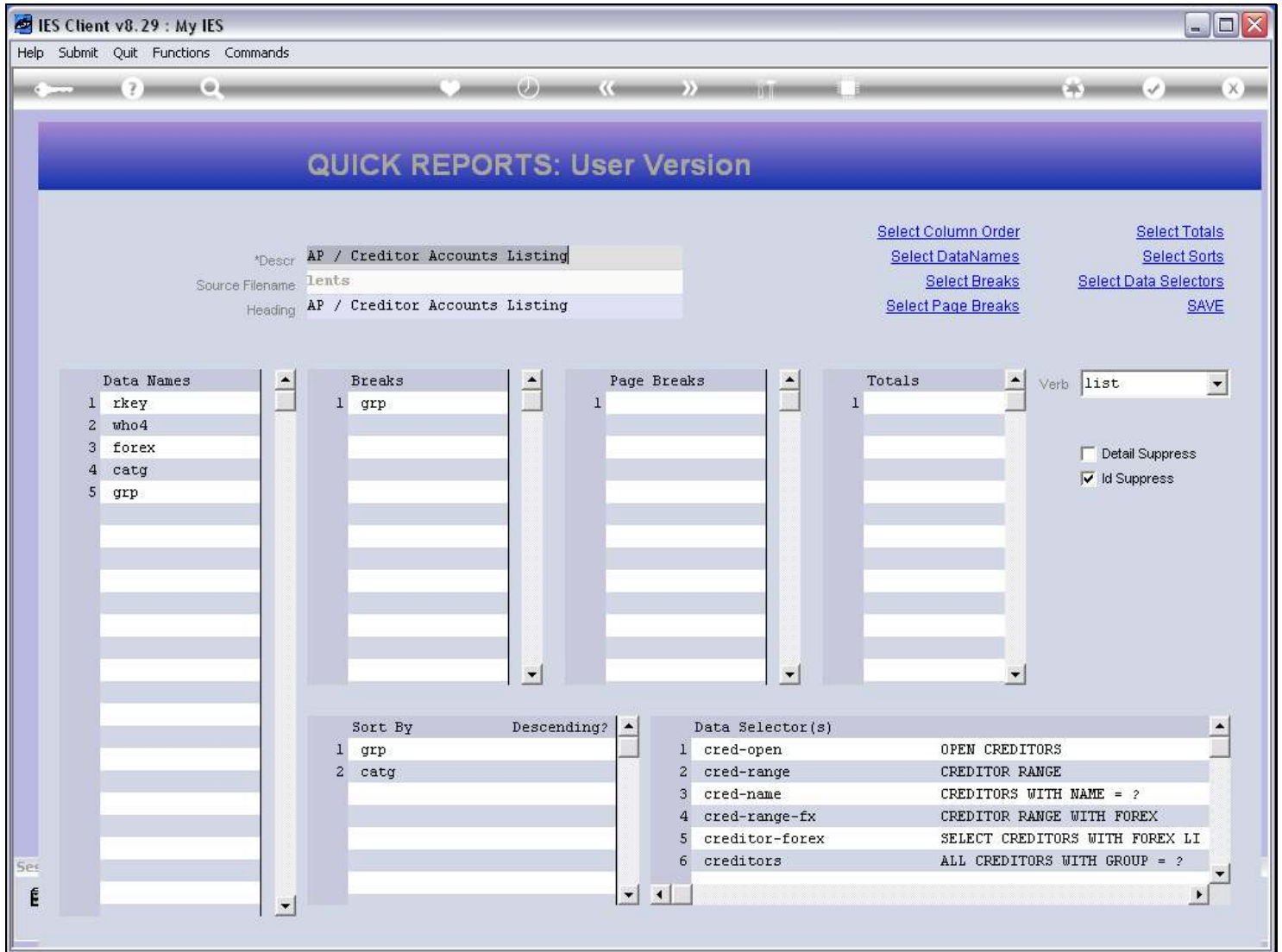
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For a new version, we choose 'Make a new User Version'.

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The system then gives us the standard system version of the Report as a basis upon which we can make our changes.

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IES Client v8.29 : My IES

Help Submit Quit Functions Commands

QUICK REPORTS: User Version

*Descr AP / Creditor Accounts Listing
 Source Filename lents
 Heading AP / Creditor Accounts Listing

Select Column Order
 Select DataNames
 Select Breaks
 Select Page Breaks

Select Totals
 Select Sorts
 Select Data Selectors
 SAVE

Data Names	Breaks	Page Breaks	Totals
1 rkey	1 grp	1	1
2 who4			
3 forex			
4 catg			
5 grp			

Verb list

Detail Suppress
 Id Suppress

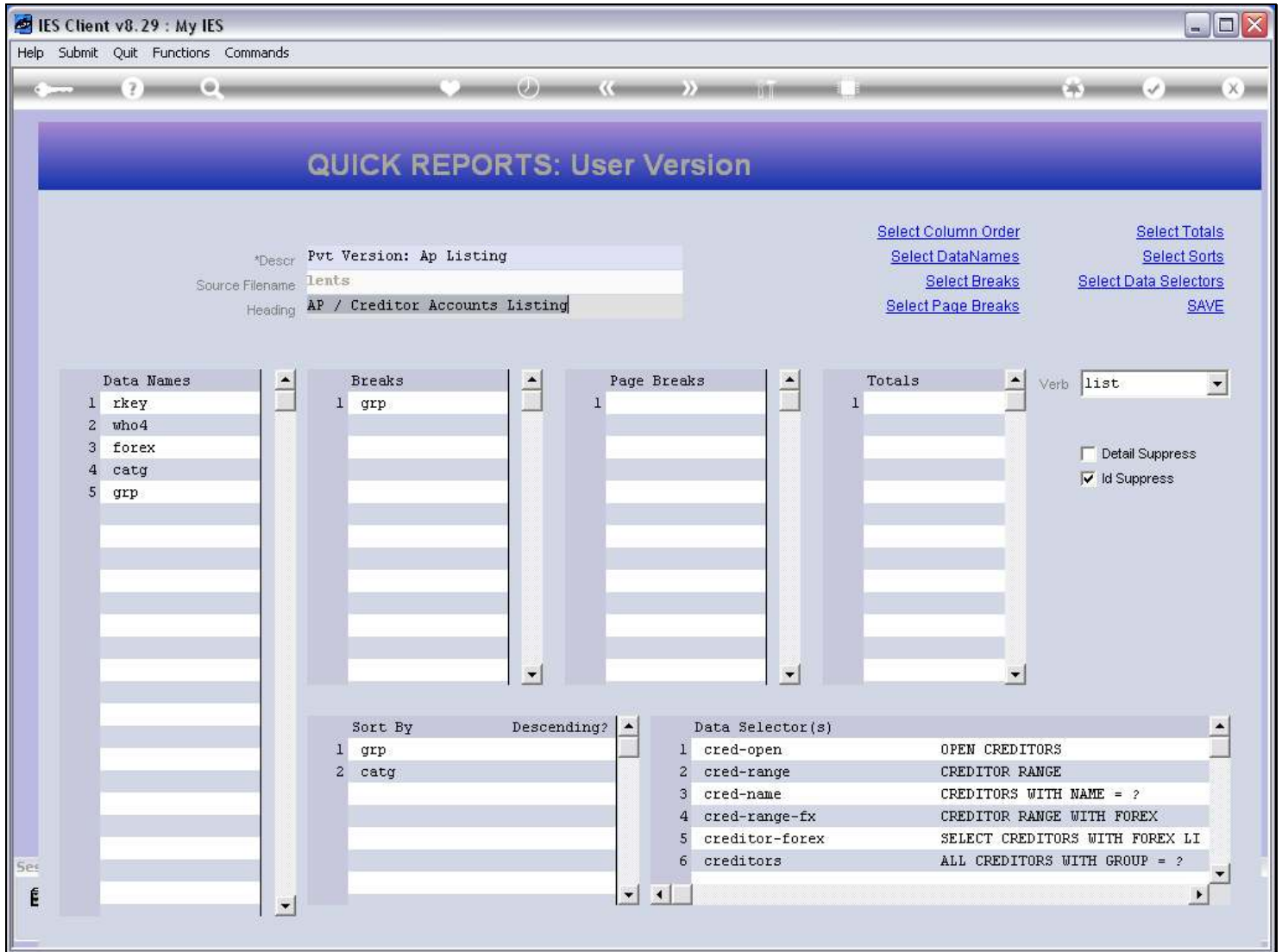
Sort By	Descending?
1 grp	
2 catg	

Data Selector(s)	
1 cred-open	OPEN CREDITORS
2 cred-range	CREDITOR RANGE
3 cred-name	CREDITORS WITH NAME = ?
4 cred-range-fx	CREDITOR RANGE WITH FOREX
5 creditor-forex	SELECT CREDITORS WITH FOREX LI
6 creditors	ALL CREDITORS WITH GROUP = ?

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The 1st thing to do is usually to change the Description, because this is not used on the Report itself, but it is used on the lookup list and we need to be able to distinguish between the different versions we have for a Report option.

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After that, we can make any changes we want to make for this version of the Report, and then save it.

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IES Client v8.29 : My IES

Help Submit Quit Functions Commands

QUICK REPORTS: User Version

*Descr Pvt Version: Ap Listing
Source Filename lents
Heading AP / Creditor Accounts Listing

Select Column Order
Select DataNames
Select Breaks
Select Page Breaks

Select Totals
Select Sorts
Select Data Selectors
SAVE

Data Names
1 rkey
2 who4
3 forex
4 catg
5 grp

Breaks
1 grp

Page Breaks
1

Totals
1

Verb list

Detail Suppress
 Id Suppress

Sort By Descending?
1 grp
2 catg

Data Selector(s)
1 cred-open OPEN CREDITORS
2 cred-range CREDITOR RANGE
3 cred-name CREDITORS WITH NAME = ?
4 cred-range-fx CREDITOR RANGE WITH FOREX
5 creditor-forex SELECT CREDITORS WITH FOREX LI
6 creditors ALL CREDITORS WITH GROUP = ?

Nex Pre Add Ins Ed Del

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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 the following steps:

- 1: - CHOOSE VERSION** (with a [Versions](#) link). The 'Report Version' field contains 'user version: Pvt Version: Ap Listing'.
- 2: - CHOOSE SETTINGS**. Fields include: Format (report), OutPut (FILE), File Type (txt text file), Template (04: Infolab), and Report Header (AP / Creditor Accounts Listing).
- 3: - CHOOSE DATA SELECTOR** (with a [Change Selector](#) link). The 'Data Selector' field contains 'cred-open OPEN CREDITORS'.
- 4: - TO e-MAIL THE RESULTS** (with a [Priority](#) dropdown set to 'normal'). Includes a checkbox for 'Despatch By E-Mail', a 'Mail Drive' field, 'Mail To', 'Mail Title' (Creditor Listing (name and code only)), and 'Message Body' (report by mail).
- 5: - ADAPT DATA SELECTION (if prompts are present)** (with a [How to define MY CHOICE](#) link). A table is shown with columns 'Selection Tip' and 'My Choice'. The first row contains '1 Group No =' and '[]'. 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).

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IES Client v8.29 : My IES

Help Submit Quit Functions Commands

IES REPORTS AND QUERIES: - User Instructions

NAME: CREDITOR LISTING (NAME AND CODE ONLY)

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Report Version: user version: Pvt Version: Ap Listing

2: - CHOOSE SETTINGS

Format: report
 OutPut: FILE
 File Type: txt text file
 Template: 04: Infolab
 Report Header: AP / Creditor Accounts Listing

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

choose from 6 data selectors
 Data Selector: cred-open OPEN CREDITORS

4: - TO e-MAIL THE RESULTS Priority: normal

Despatch By E-Mail Mail Drive *

Mail To:
 Mail Title: Creditor Listing (name and code only)
 Message Body: report by mail

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

Selection Tip	My Choice
1 Group No =	[]

Nex Pre Add Ins Ed Del

6: - Record Select:

OPEN Records only
 CLOSED Records Only
 EITHER

7: - CHOOSE NEXT [Next](#)

Slide notes

Note that the system now intends to perform the new User Version, rather than it's own System Version.

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IES Client v8.29 : My IES
Help Submit Quit Functions Commands

IES REPORTS AND QUERIES: - User Instructions

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Report Version: user version: Pvt Version: Ap Listing

2: - CHOOSE SETTINGS
Format: report
OutPut: FILE
File Type: txt text file
Template: 04: Infolab
Report Header: AP / Creditor Accounts Listing

3: - CHOOSE DATA SELECTOR [Change Selector](#)
Data Selector: cred-open OPEN CREDITORS

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

Mail To: _____
Mail Title: Creditor Listing (name and code only)
Message Body: report by mail

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

Selection Tip	My Choice
1. Group No =	[]

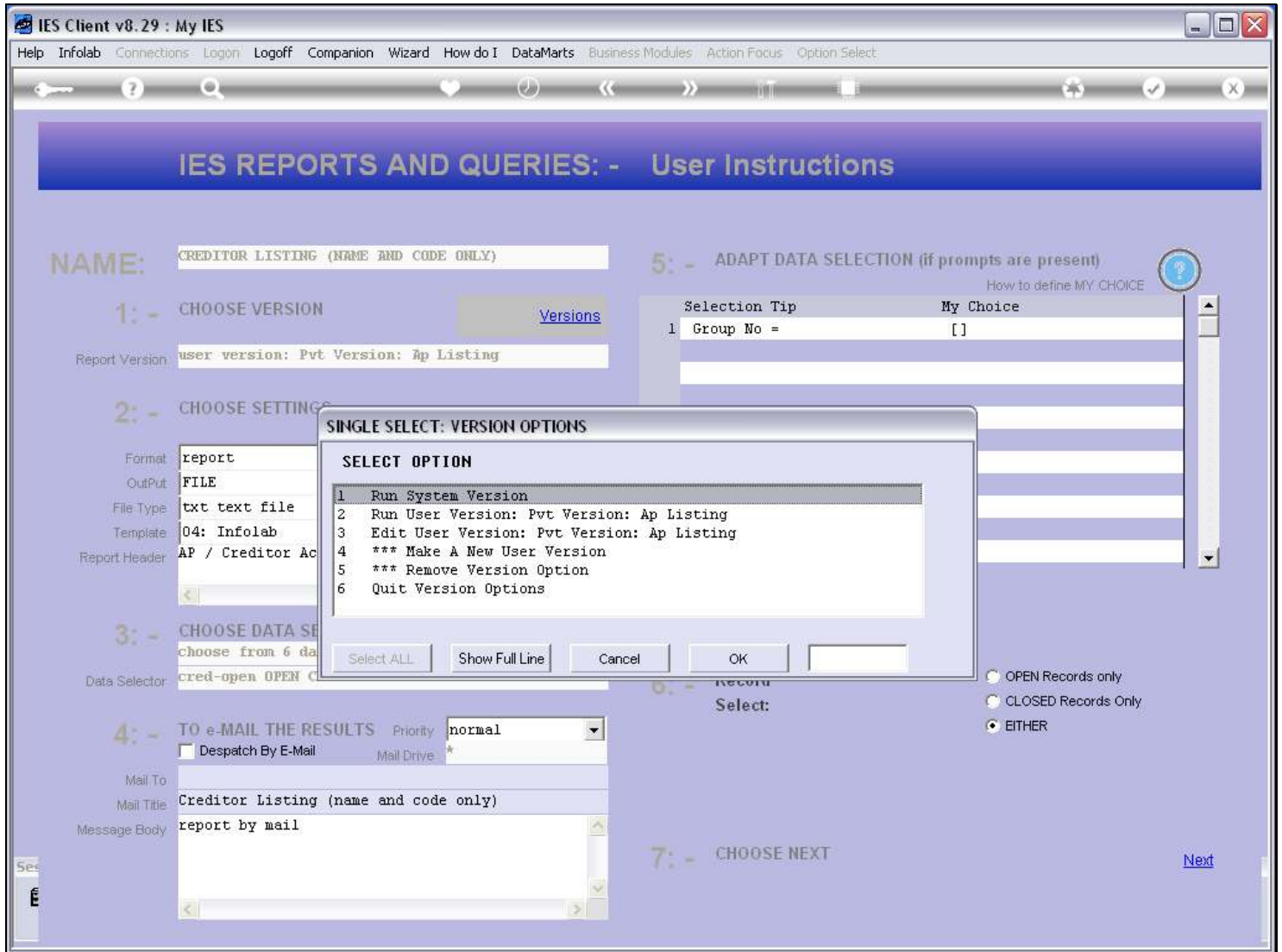
Nex Pre Add Ins Ed Del

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

7: - CHOOSE NEXT [Next](#)

Slide notes

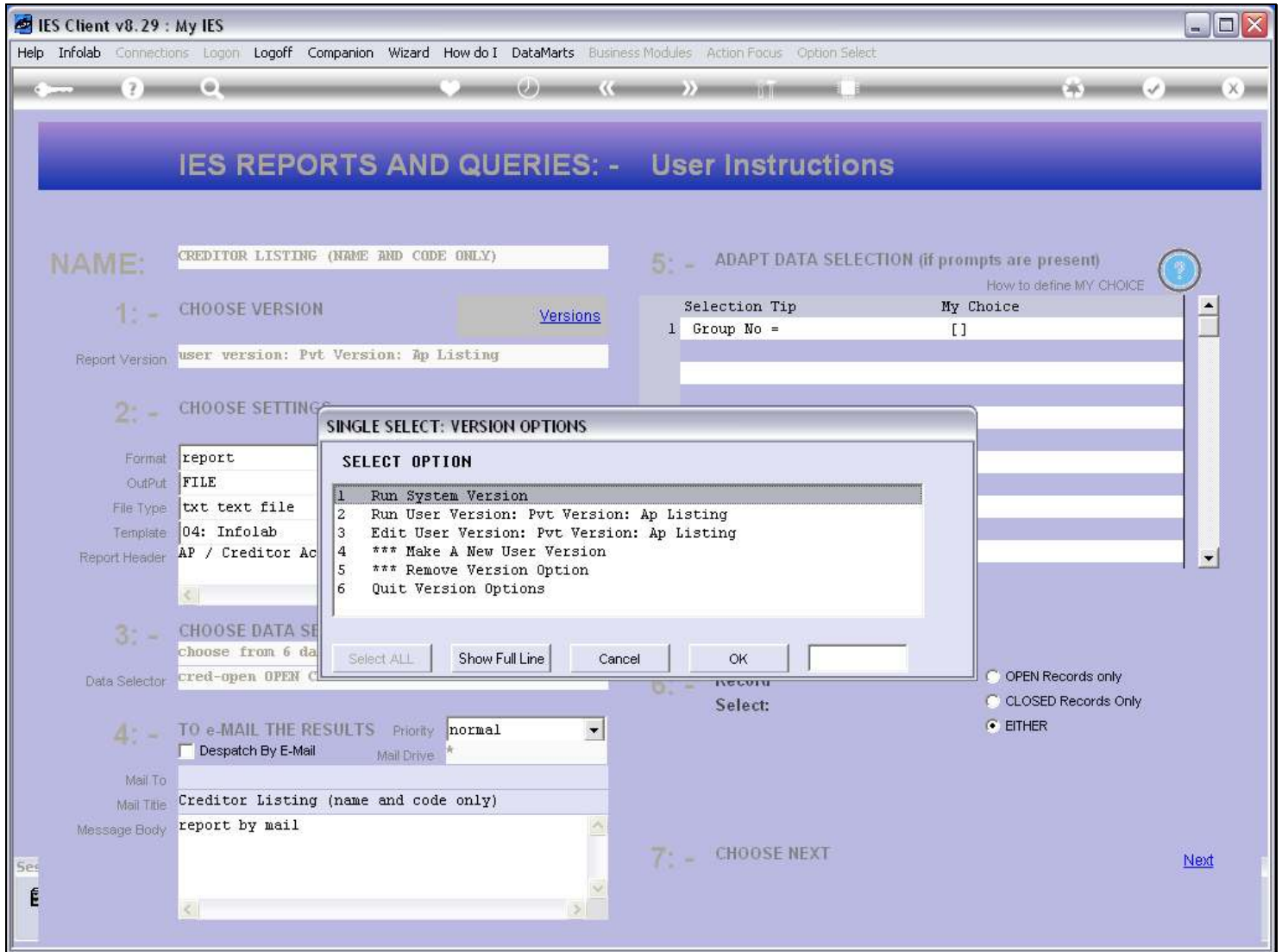
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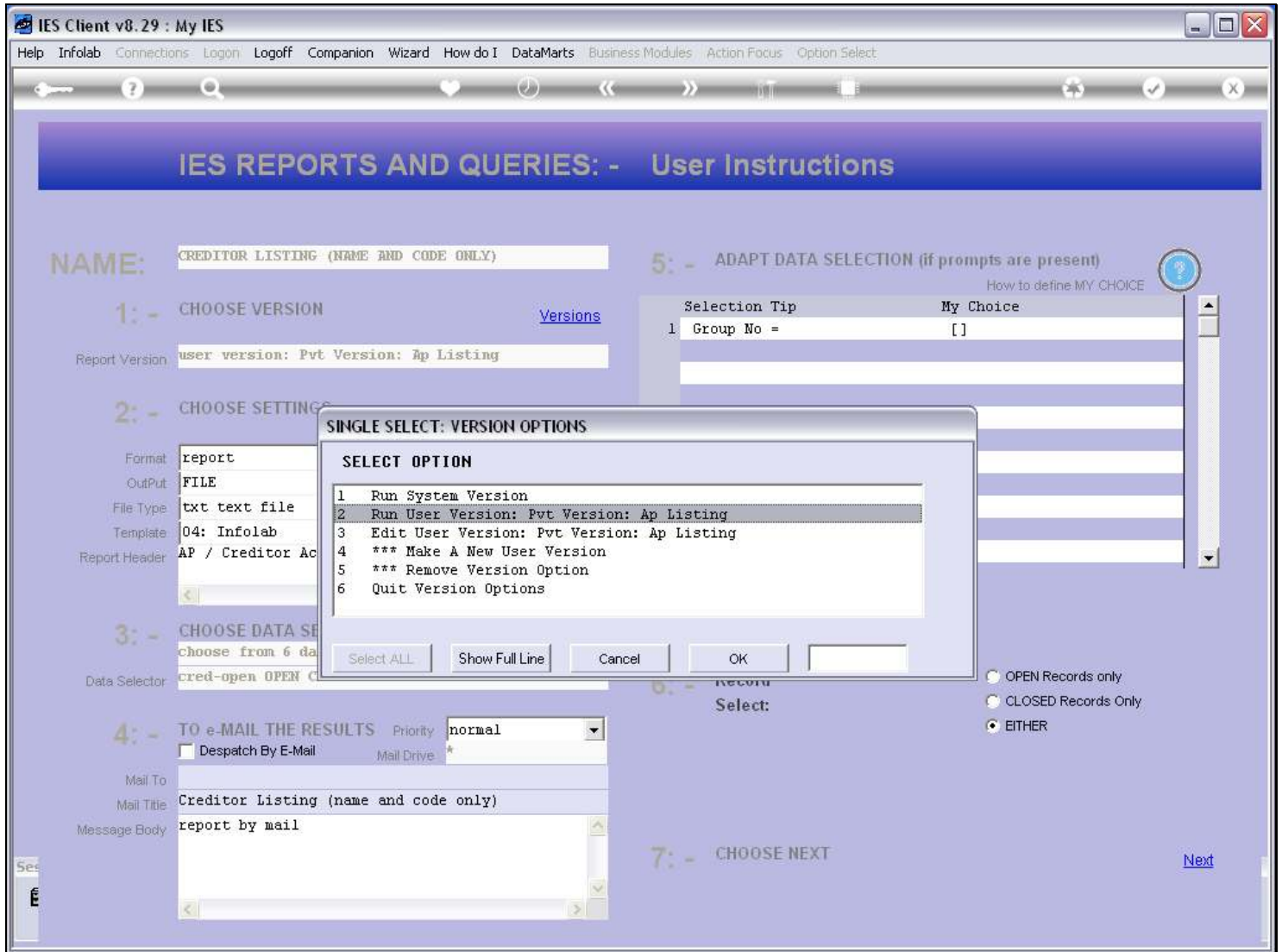
And if we go back to 'versions', then we can see that we have 1 User Version of the Report in addition to the System Version.

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IES Client v8.29 : My IES

Help Submit Quit Functions Commands

IES REPORTS AND QUERIES: - User Instructions

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Report Version: user version: Pvt Version: Ap Listing

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Format: report
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 Report Header: AP / Creditor Accounts Listing

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

choose from 6 data selectors
 Data Selector: cred-open OPEN CREDITORS

4: - TO e-MAIL THE RESULTS Priority: normal

Despatch By E-Mail Mail Drive *

Mail To: _____
 Mail Title: Creditor Listing (name and code only)
 Message Body: report by mail

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

Selection Tip	My Choice
1 Group No =	[]

Nex Pre Add Ins Ed Del

6: - Record Select:

OPEN Records only
 CLOSED Records Only
 EITHER

7: - CHOOSE NEXT [Next](#)

Slide notes

Whenever we want to make another new version, we can.