Standard Report Development

General Notes

Once the results look right, go to the Results menu and choose Show As Report, and select BI/Query Standard.

Almost every command you will need to format the report is found under the Report menu.

Common first steps and related tips:

1. **Adjust the column widths**

   It works best to start at the right and work back towards the left.

   You can't manually adjust the width of the margin on the page.

2. **Reorder columns**

   The columns that were sorted on will be first. If you are going to subtotal, it is important to keep the sorted columns in the same order from left to right. Moving titles next to their associated codes is safe.

3. **Suppress duplicates**

   This works from left to right only as far as the first column where each line is unique. If columns farther to the right have duplicates, they will not be suppressed.

4. **Edit the column headings**

   You can only edit the text and change the alignment of one column at a time.

   You can change the format of all columns at once by clicking in the page margin next to the column headings and then selecting Text Style from the Reports menu.

   When editing the text, I recommend you not use the Enter key to force the title onto multiple lines. It causes problems when exporting reports, and can complicate other formatting.

5. **Edit the report title**

   You should consider whether adding the value(s) that you entered into prompts would be beneficial as part of the report title. Especially when you might enter multiple values into a single prompt, you may be better off just having those values appear in a column in the body of the report.

6. **Add borders to the report**

   Once you find that you format all your reports in the same way, you can set those borders as a default that will automatically apply to all new reports, and then you can override that formatting as needed on individual reports later. You set the default under Tools, Preferences, Report Borders.

Note **the parts of a Standard Report**: Header, Column Headings, Results, Footer.

To **save a report**, go to the {Report} menu and select "Save Report Specifications". It will automatically add a .rpt extension to the query name, and save it in your User Queries folder. It will also automatically save your query. If the query hadn't previously been given a name and been saved, the report name will default to "Untitled", and you will need to give it a descriptive name.

Resize columns by clicking in either the Column heading section or the results section, so that you can see a border around the column, and click and drag the right-hand border of the column to the width you want. You can also go to the {Reports} menu and select "Column Settings" and change the column width there. If you see asterisks in the column, the column is not wide enough to display the data. You can't resize the right margin.

Reorder columns by going to the {Reports} menu and selecting "Reorder Columns…". Then select a column or group of columns and use the buttons in the dialog box to move what you selected up or down until the column order from top to bottom represents the order from left to right that you want to see.

Suppress duplicates by selecting a column and going to the {Reports} menu and selecting "Suppress Duplicates". Values in a column are only considered duplicates if all values to the left are also the same.

To **format text** in a column or column heading, click on the column or column heading you want to format. From the {Report} menu, select "Text Style". Specify the desired format. If you are formatting a column heading and want to change the text of the heading, type the new heading in the Text box. Click OK. You can format multiple columns by shift clicking them to select them before going into Text Style. You can format all the columns at once by clicking in either the left or right margin before going into Text Style. Alignment can only be changed one column at a time.

Edit the report title by double-clicking on the text and then clicking the "Edit Text" button. Consider using the Prompts button to insert the same prompt(s) used in the query to let the report title reflect the values used to generate the report.

Add borders by going to the {Reports} menu and selecting "Borders". Apply a line style and color to each report component. Subtotals will only have a line above them, unless you specify that you also want a border below the primary and/or secondary subtotal.

To **add a calculated column**, from the {Report} menu, select "Add Calculated Column". In the Name box, type the name of the new column. In the Expression box, enter the calculation for the new column Click OK. Add calculated columns before adding subtotals and grand totals to have the totals automatically displayed and formatted.

To **add subtotals**, click the column on which to base the subtotal (usually a column that has been sorted. From the {Report} menu, click "Add Subtotal". Select the desired calculation for each column. (Note: the Count operator counts only the visible values in

a column, so if you have suppressed duplicates, the count doesn't include the suppressed values.) Click outside the subtotal to run the calculation.

To **insert a page break** after each subtotal in a report, click in a subtotal line, and from the {Reports} menu, select "New Page After Subtotal".

To **add a grand total**, from the {Report} menu, click "Add Grand Total". Select the desired calculation for each column. (Note: the Count operator counts only the visible values in a column, so if you have suppressed duplicates, the count doesn't include the suppressed values.) Click outside the subtotal to run the calculation.

To **customize other column settings**, from the {Report} menu, select "column Settings". From the columns list, click the column you want to customize. To change the title for the column, type the new title in the Column Heading box. To apply a special border to the left side of the column, click Special Column. You can format this special border using the Report Borders dialog box. To wrap column data that exceeds the width of the column, select Wrap Column. This is enabled only for columns containing character data, not numbers or dates. Click OK.

You can **modify or create ornaments**. The title, date, page number and labels in subtotals are ornaments. To edit an existing ornament, double-click on it. To create a new one, right=click where you want the ornament to appear, and select "Create Ornament".

To **combine columns**, Shift+click the columns you want to combine. Then from the {Report} menu, select "Combine Columns". Select a Separator from the Separator drop-down list, or type your own in the box. Click OK. Note that the column title for the column on the left becomes the title for the combined column.

To **create a banded column**, from the {Report} menu, select "Column Settings". From the Columns list, select the column you want to band. Click Band Column, and then select Before or After to display the column above or below the other columns. Click OK.

To **create a stacked column**, shift+click the columns you want to stack and from the {Report} menu, select "Stack Columns". Note, you can only have one stacked column in a report, and it must be the leftmost column.

To **format a string** of characters, click the column containing the data you want to format. Go to the (Report} menu and select "format". Under format type, select "String". Enter characters and special characters in the "Format String" box until the data appears the way you want it to.
Inserts a character from the original data.
_   Suppresses a character in the original data.
*   Inserts the remaining characters in the original data.
\   Inserts the next character as is.
For example, 6135554355x26 with a format of (###) ###-####_ Ext. \#* will appear like (613) 555-4355 Ext. #26 after you are done.