Chapter 5.

Reports, Letters and Labels

Alpha Five has awesome reporting capabilities.

The power of a database is the multitude of ways the data can be viewed. The same information that confirms a sale can show a complete report of purchases by all customers.
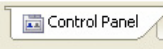
Overview

Another long chapter packed with information. As we did for the previous one, we've broken it down into segments. Here's a quick review of the topics and where you'll find them when you need a refresher. Exercises are in "teaching order," so look around for what you need. **New Version 10 features are in green**.

Preparation for the Lesson.

Open Alpha Five and navigate to the following file:

> •c:\A5_Ver10Book\ABC_V10_Lessons\ABC Seminars.adb[*]

> • [Control Panel] Click on the Control Panel tab in the Window Bar at the bottom of the screen to bring the Control Panel to the front.

SPECIAL NOTES

As fields are added to the form, the *Summary Genie* may pop–up. Accept the default settings and click *Finish*.

The techniques in this chapter may be applied to any report. To do so, open the report in design mode to begin the segment.

These exercises are designed to be done in book sequence. If you do the Operations section before this Reports section, the report may not match the steps in the book because some client names may have been deleted. To work around this problem, reinstall the companion files. They will overwrite any changes you have made.

Because this is a long chapter, it has been broken into a series of exercises. The quill and inkwell mark the beginning and end of each exercise.

Learning Report basics

If you are new to Alpha Five, you may have already looked at the report editor and might be feeling overwhelmed because its interface can look confusing at first glance. Not to worry, we will take the sections one at a time. By the end of this chapter, you will feel comfortable[†] and be ready to start your own design.

POWERFUL EDITOR

The report editor is very powerful and you should not need an outside report writer. Over the years, we have made very complicated reports. Before the Internet and online data entry, we even copied government forms, line for line, so that we would not have to complete them by hand.

Alpha Five presents a quick and easy way to get started with reports. We will first design one using the genie and then we'll update it with some custom design.

FINISHED REPORT

Double click on **FirstReportDemo** to see a completed report for this segment.

Creating a Quick Report

Quick reports mean a quick start. In this section, we will use the Quick Report genie to examine the design tools and learn how to use them. The next three pages illustrate the genie and initial draft at design and preview modes, followed by a look at the final custom report.

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[*]. Depending on how Alpha Five is opened, the file extension **.adb** may not appear. (For instructions on opening an existing database, see "Opening an existing database" on page 14.)

[†]. Promise!

- **From this:**
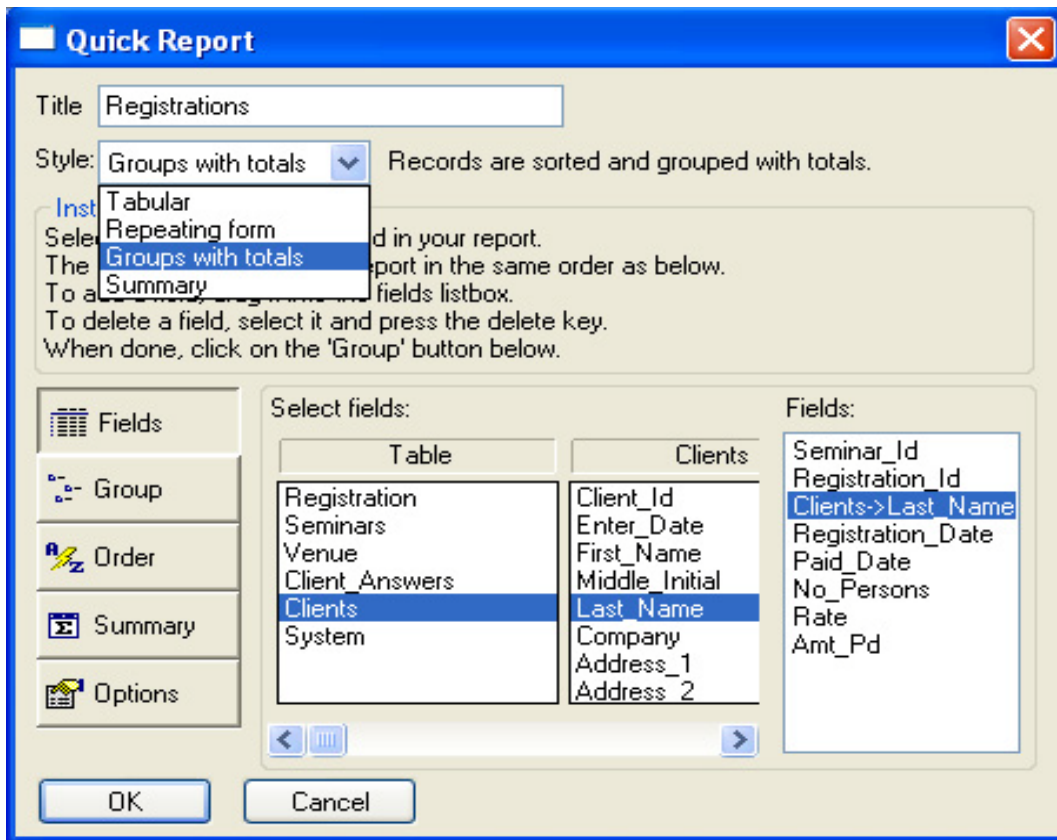
- **To this in a few minutes:**
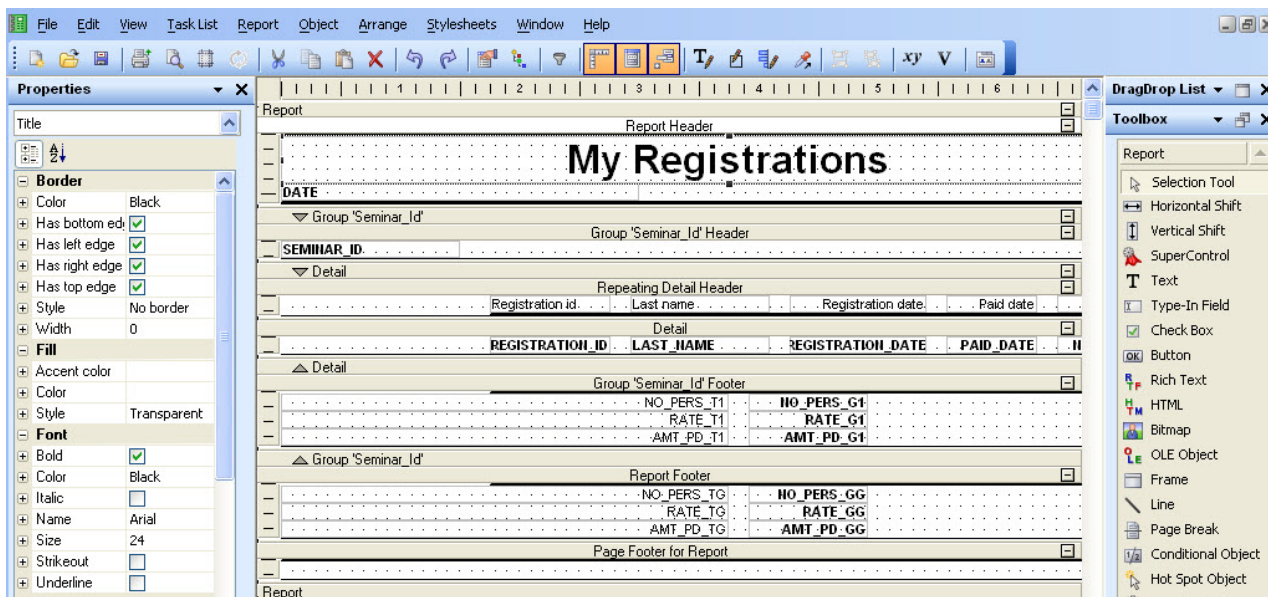
- **To this in a few more clicks:**[*]

My Registrations

14-November-2009

00001   Get Outta DOS

Registration id	Last name	Registration date	Paid date	No persons
00001	Anderson	08/08/2001		2
00006	Appleton-Smith	08/13/2001	08/21/2001	1
00007	Bush	08/06/2001	08/06/2001	2
00003	Halton	08/11/2001	09/01/2001	2
00004	Hendrickson	08/23/2001		1
00005	Steele	08/05/2001	08/13/2001	1
00002	Thompson	08/10/2001	08/14/2001	1

Total no_persons for 00001 :   10
Total rate for 00001 :   923.95
Total amt_pd for 00001 :   944.90

00002   Get Outta DOS

| Registration id	Last name	Registration date	Paid date	No persons
00016	Anderson	01/20/2002	01/25/2002	1
00022	Appleton-Smith	01/10/2002	01/10/2002	2
00010	Gleason	01/20/2002	01/20/2001	1
00015	Gleason	01/25/2002	01/25/2002	1
00026	Gleason	01/04/2002	01/04/2002	1
00008	Hendrickson	01/02/2002	01/15/2002	2
00009	Williams	01/11/2002	01/11/2002	1

Total no_persons for 00002 :   9
Total rate for 00002 :   1153.00
Total amt_pd for 00002 :   1312.00

00003   Get Outta DOS

Registration id	Last name	Registration date	Paid date	No persons
00024	Anderson	04/12/2002	04/18/2002	5
00019	Bush	04/21/2002	04/30/2002	2
00025	Campbell	05/08/2002	05/08/2002	2
00013	Franklin	05/23/2002	05/23/2002	1
00011	Frome	05/21/2002	05/21/2002	2
00020	Steele	05/25/2002	05/25/2002	1
00012	Thompson	04/15/2002	04/25/2002	1
00017	Williams	05/20/2002	05/20/2002	2

Total no_persons for 00003 :   16
Total rate for 00003 :   1442.00
Total amt_pd for 00003 :   1979.00

00004   Get Into Alpha 5!

Registration id	Last name	Registration date	Paid date	No persons
00023	Appleton-Smith	08/30/2002	09/13/2002	2
00027	Appleton-Smith	06/06/2008	06/06/2008	3
00018	Bush	08/30/2002	09/15/2002	2
00014	Campbell	09/12/2002	09/12/2002	3
00021	Halton	08/25/2002	08/25/2002	1

Total no_persons for 00004 :   11
Total rate for 00004 :   1841.00
Total amt_pd for 00004 :   2917.00

00005   Get Into Alpha 5!

Registration id	Last name	Registration date	Paid date	No persons
00033	Anderson	03/05/2004	03/15/0200	2
00032	Appleton-Smith	05/06/2007	06/06/2007	2
00035	Frome	06/05/2008		3

Total no_persons for 00005 :   7
Total rate for 00005 :   1350.00
Total amt_pd for 00005 :   1300.00

00006   Get Into Alpha 5

Registration id	Last name	Registration date	Paid date	No persons
00029	Anderson	06/18/2008	06/15/2008	1
00028	Williams	06/14/2008	06/15/2007	3

Total no_persons for 00006 :   4
Total rate for 00006 :   1300.00

1

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[*]. There are actually 4 pages in this report because some of the data has overflowed onto another page, as when you print a spreadsheet that is too wide for the page. We'll fix that and refine the report in this chapter.

- **To this with a bit more work.**

00001 **Get Outta DOS**
Marriott Courtyard Fort Lauderdale Plantation
Date:10/18/2001

Reg ID	Name	Reg Date	Paid Date	No persons	Rate	Amt Pd	Amt Due	Balance Due
00001	Anderson, Joan H	08/08/2001		2	129.00		258.00	258.00
00006	Appleton-Smith, Betsy R	08/13/2001	08/21/2001	1	129.00	129.00	129.00	0.00
00007	Bush, Susan H	08/06/2001	08/06/2001	2	129.00	258.00	258.00	0.00
00003	Halton, Geoff M	08/11/2001	09/01/2001	2	149.95	299.90	299.90	0.00
00004	Hendrickson, Mary G	08/23/2001		1	129.00		129.00	129.00
00005	Steele, John	08/05/2001	08/13/2001	1	129.00	129.00	129.00	0.00
00002	Thompson, Sally H	08/10/2001	08/14/2001	1	129.00	129.00	129.00	0.00

Group Summary

Total Registrations for: 00001	10
Amt Due for: 00001	1,331.90
Total Amt Pd for: 00001	944.90
Balance due for: 00001	387.00

00002 **Get Outta DOS**
Marriott Courtyard Lincroft/Red Bank
Date:02/09/2002

Reg ID	Name	Reg Date	Paid Date	No persons	Rate	Amt Pd	Amt Due	Balance Due
00016	Anderson, William H	01/20/2002	01/25/2002	1	169.00	169.00	169.00	0.00
00022	Appleton-Smith, Betsy R	01/10/2002	01/10/2002	2	169.00	169.00	338.00	169.00
00010	Gleason, Harry G	01/20/2002	01/20/2001	1	159.00	159.00	159.00	0.00
00015	Gleason, Harry G	01/25/2002	01/25/2002	1	169.00	169.00	169.00	0.00
00026	Gleason, Harry G	01/04/2002	01/04/2002	1	169.00	169.00	169.00	0.00
00008	Hendrickson, Thomas M	01/02/2002	01/15/2002	2	159.00	318.00	318.00	0.00
00009	Williams, John	01/11/2002	01/11/2002	1	159.00	159.00	159.00	0.00

Group Summary

Total Registrations for: 00002	9
Amt Due for: 00002	1,481.00
Total Amt Pd for: 00002	1,312.00
Balance due for: 00002	169.00

00003 **Get Outta DOS**
Marriott Courtyard Galleria
Starts: 06/07/2002 Ends: 06/09/2002

Reg ID	Name	Reg Date	Paid Date	No persons	Rate	Amt Pd	Amt Due	Balance Due
00024	Anderson, Joan H	04/12/2002	04/18/2002	5	169.00	169.00	845.00	676.00
00019	Bush, Susan H	04/21/2002	04/30/2002	2	169.00	338.00	338.00	0.00
00025	Campbell, Mary	05/08/2002	05/08/2002	2	169.00	338.00	338.00	0.00
00013	Franklin, Andrew O	05/23/2002	05/23/2002	1	169.00	169.00	169.00	0.00
00011	Frome, Alice G	05/21/2002	05/21/2002	2	199.00	398.00	398.00	0.00
00020	Steele, John	05/25/2002	05/25/2002	1	199.00	199.00	199.00	0.00
00012	Thompson, Sally H	04/15/2002	04/25/2002	1	169.00	169.00	169.00	0.00
00017	Williams, John	05/20/2002	05/20/2002	2	199.00	199.00	398.00	199.00

Group Summary

Total Registrations for: 00003	16
Amt Due for: 00003	2,854.00
Total Amt Pd for: 00003	1,979.00
Balance due for: 00003	875.00

TROUBLE SHOOTING   I have also used the quick report when I having trouble getting the desired results in a custom report. If you can't do the basics here, your design probably needs rethinking.

1. *Alpha Five Control Panel Tab:* **Reports.**

2. Click the **New** button.

3. *Data Source*: **registration_rept.set**

4. *Method:* Choose **Use Quick Report**. (Click OK)

    •The Quick Report definition dialog box opens (screen shot on page 186).

5. Set the following parameters:

    •*Title:* **MyRegistrations.**

    •*Style*: **Groups with totals.**

FIELDS   6. Click the **Fields** button (should be default).

7. *Select fields:*

    a. *Registration table:* Double click or drag the following fields to add them to the Fields box on the right side:

Registration ID	Registration Date	No Persons	Amt Pd
Seminar ID	Paid Date	Rate	

    b. *Clients table:* Double click the **Last Name** field to add it to the Fields box:

CHANGE FIELD ORDER   The fields appear on the report in the order listed in the Fields box. We will change the order of the fields so they will be more logical for this report.

8. *Fields*:

    a. Click **Seminar ID**, drag it up to the top of the list.

    b. Move **Clients->Last Name** to the 3rd position

MOVE FIELD   If you have trouble getting the field to the top, move it to 2nd place. Then move the top field below it—like a Rubix cube!

REMOVE FIELD   To remove a field from the Fields box, drag it off to the right, out of the box or click it and press DELETE.

GROUPS   9. Click the **Group** button for the available groups.

10. Double click **Seminar ID** to place it in the *Groups* box.

ORDER   11. Click the **Order** button.

12. Double Click **Clients->Last Name** to move it to the *Sort fields* box.

SUMMARY   13. Click the **Summary** button.

    •The genie has filled in the fields—all numeric—that are eligible for a summary operation. We'll accept them. Procedure to change is as follows:

        a. Click in the Summary Operation box and then click the smart button.

        b. Choose a summary from the pick list.

OPTIONS

14. Click the **Options** button. Click the checkboxes as follows:

      a. *Titles*: **Bold**.

      b. *Page:* **Page Number, Day/Date, Center Title.**

15. Click OK.

    •The Report Editor appears (see screen shot on page 186). We will explain in detail each of the sections, but first let's make one quick change and then take a look at the report.

PROPERTIES PANE

If you have done the section on forms, you will be totally familiar with the new Version 10 feature, Properties Pane (aka Properties Dock Panel).[*]

•Reminder: If it's not visible, go to *Top Menu > Task List > Properties* or click on the *Properties* tab at the upper left of the design window.

IMPORTANT NOTE

We will make one change in the instructions, however. Since the genie created this report, the object names are not identified in the same manner as they were in Chapter 4. In the form, the company field automatically was given the same object name as the field and the same happens when an individual field is dragged onto a report. In other words, the object name for the Company field would be "company." In the Quick Report, however, it is given a generic name, such as field2 or field3. In this chapter, we will use the field name rather than the object name to avoid any confusion.

• Next, we will change the name of the heading and its color.

16. Click on the large title in the report: **MyRegistrations**.

17. *My Registrations text > Properties Pane:*

FONT

•Color: Red

MISC

•Name: HeaderTitle

Testing the design of the report

As we moved back and forth between design and form view to check the results of our forms, we will move back and forth between design and *preview* to check the content and design of the report. It will be even more important here, because we really can't see the report until it is previewed. So, your report BFF's are the Print Preview and Exit Preview buttons.

• In *Design* mode, press the *Print Preview* button. In *Preview* mode, click the **Exit Preview** button to return to *Design* mode. (Betcha already figured that out!)

WORD TO THE WISE

Saving the form is not required when moving from *Design* to *Preview*. Alpha Five is quite stable at preview, however, it is highly recommended that you get in the habit of saving before changing modes. Report design uses a lot of Windows resources and the program may hang at *Preview* if you have a lot of unsaved edits. (Just when you least want it to happen!)

•You can also print without saving because Alpha Five will create a temporary file, but, for the above reasons, it is still a good idea to save first.

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*. For information on using the Properties Pane, see "Using the views" on page 89 and "Using the Properties Pane" on page 102.

18. CTRL + S to save as *MyFirstReport*.

19. Click the *Print Preview* button on the Reports Toolbar.

Understanding the preview tabs

When you go to preview from the report editor, an additional tab is opened in the window bar below the report.

• If the tabs are not showing, choose Top Menu > View > Window Bar to open that section of your screen.

NAVIGATION

These tabs allow you to move quickly between design and preview. There are certain notations, however.

IMPORTANT NOTE

Any time you click Print Preview, another preview window is opened, **but** Alpha Five needs to freshly render the report each time changes have been made. Follow this procedure to be sure you are always viewing the current design.
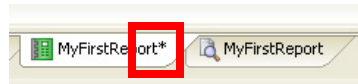
PREVIEW TO DESIGN

a. Click the X Exit Preview button on the toolbar.

DESIGN TO PREVIEW

b. Make any changes and click the Print Preview button to return.

UNSAVED EDITS

•Saving is not required before previewing the report. If the report has unsaved edits, the editor TAB will show an asterisk (red box).

SAVE EDITS

To save changes to the report, you must click Exit Preview and then save the report. Properly done the asterisk (above) will be gone when you return to preview.

Understanding the preview toolbar

This toolbar is used for navigating, printing* and viewing the report. It also gives a wide range of options for saving and/or emailing reports in one of five formats common to most computer systems. This means recipients do not need Alpha Five installed on their computers to read your reports.

IMPORTANT NOTE

As you preview this report, you will notice there is overflow onto a 2nd page, like a spreadsheet that's too wide. Don't worry about that now. We will fix it later.

PAGES

The first group of buttons are for viewing certain pages in the report.

•First page, Previous page, Go to <page number> (you can enter the desired page), Next page, Last page.

PRINT

The next group is for printing the report.

•Print and Print Setup.

VIEW

The next group gives options for viewing the report on screen.

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*. You can also print directly from the Report Editor, but, in most cases, you will probably want to preview it first.

•Zoom. There are two zoom settings, in and out. You may also zoom by moving the cursor onto the report. It changes to a magnifying glass.

•Two pages: Shows 2 pages on the screen at one time. Zoom must be set to lesser magnification so there is room on the screen for both pages.

•Color: Toggles areas with color off/on.

YOUR REPORT BFF

✕ Exit Preview

The Exit Preview button returns to report design mode.

ACTIVATE CONTROL PANEL

The next button takes you to the Alpha Five control panel.

Saving reports as PDF, HTML, Rich & Plain Text and Excel files

For the most part, you will probably save and print your reports from within Alpha Five. There are, however, five additional formats that can be used to save and/or send reports.

Alpha Five has built-in HTML and PDF drivers.[*] Rich Text (Word and WordPerfect), Excel, and plain text formats are also available. Our purpose at this time is to give an overview of the features available. There is further discussion in "Creating Letters" on page 245.

• Selections are made at the final two "multiple choice" buttons.

•The one on the left saves the report in one of the above formats to a specified directory.

•The second forms the report in the selected format and opens a Send Email form, with the report attached.
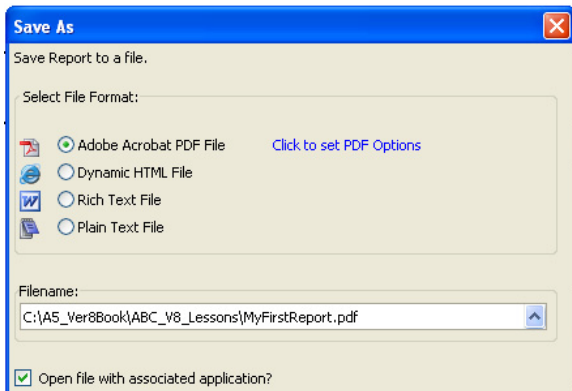
SAVE AS FORMATS
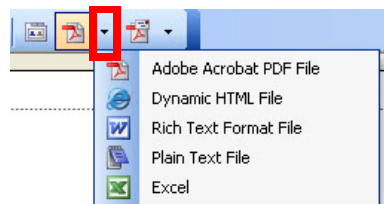
20. Click the drop down arrow next to the left button (red box at left).

•When you hover over the down arrow, bubble help reads: **Select format for saving report.**

•The icon on the button shows the last format used. (PDF is shown here, yours may be different.)

•Adobe Acrobat PDF. Most users have *Adobe Acrobat Reader* on their computers. It is also available as a free download at www.adobe.com. The PDF driver is built-into Alpha Five, so you do not need a separate program.

•Dynamic HTML File. Report will open in your browser. The HTML writer is built-into Alpha Five.

•Rich Text File. This can be read and edited by users of *Microsoft Word* and *Corel WordPerfect*.

•Plain Text File. Removes all formatting. Can be read by any computer user.

• Excel File: Report will open in Microsoft Excel, as a spreadsheet.

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*. PDF driver rewritten in Version 10 for compatibility with Windows 7. See Help > What's New in Version 10 > Desktop Features: New version of Alpha Five PDF Printer.

The Save As dialog is the same for all the formats.

a. Click the current button or its drop down arrow.

b. Choose the desired format (default is current button, but you can change).

c. Choose the directory.

The last used format remains the default. In other words, if you format a report as a Rich Text file, the Word icon will appear on the toolbar. It can, of course, be changed to a different format at any time.

•Next, we'll test out the PDF option.

SAVE FIRST!   If you have not saved the report, you will get an error message here advising you to return to return design mode and save the report before you can continue.

21. Choose **Adobe Acrobat PDF File.**[*]

22. *File name:* Accept the default.

• C:\A5_Ver10Book\ABC_V10_Lessons\MyFirstReport.pdf

23. *Open file with associated application?* Check (Yes)

24. Click OK.

•The program may ask for permission to overwrite an existing file. (Yes)

•If it is unable to find a PDF driver, Alpha Five will ask for permission to try to install it. (Yes)

•If the PDF driver is installed correctly, the report appears on the screen.

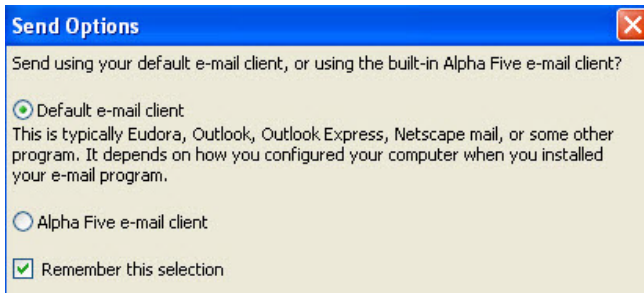25. Close **Acrobat**.
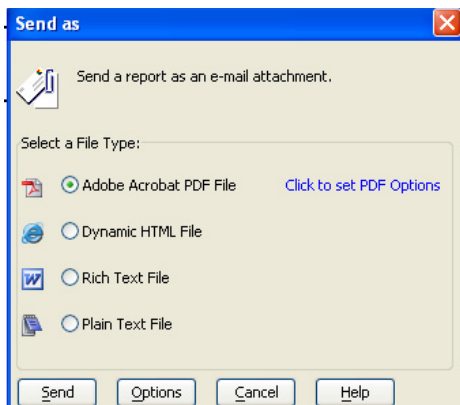
SEND EMAIL ATTACHMENT[†]
The process for sending email attachments is essentially the same as above, except that the completed document is NOT shown on the screen.

In order to actually send an email, you will need to tell Alpha Five which email client to use. For the purposes of this exercise, we will use your existing (default) email client, such as Outlook or Outlook Express. E-mailing with Alpha Five is discussed in *Bonus Pages:* "E-mail and Fax with Alpha Five" beginning on page 527. We will also set it so that, once the email client is defined, it will hold until changed.
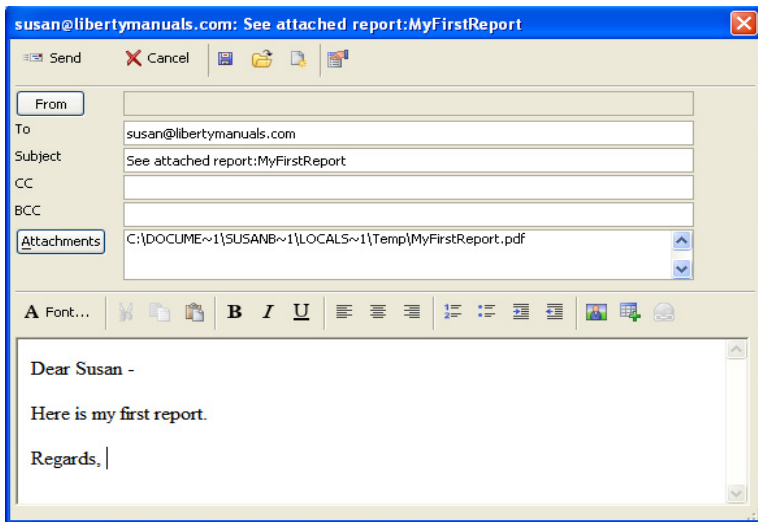
a. Click the current button or its drop down arrow.

b. Choose the desired format from the Send As dialog.

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[*]. This choice requires that Adobe Acrobat Reader be installed on your computer. You may get a free download at www.adobe.com. You may also choose another format if you prefer.

[†]. In the unlikely event that you have not set up an email account, you may be directed to go to the "Mail Icon on the Control Panel." This means the WINDOWS CONTROL PANEL, not the Alpha Five Control Panel. Open the **Windows Control Panel** and click on **Mail** to set up the account. (This memo has been here since our earliest Alpha Five Made Easy book versions. Hard to believe there's anyone out there without an email setup these days, but we leave it in just in case.)

Send Options

Send using your default e-mail client, or using the built-in Alpha Five e-mail client?

◉ Default e-mail client
This is typically Eudora, Outlook, Outlook Express, Netscape mail, or some other program. It depends on how you configured your computer when you installed your e-mail program.

○ Alpha Five e-mail client

☑ Remember this selection

c. Click the **Options** button.

d. Choose **Default e-mail client**.

e. Remember this selection: **Yes**. (Click OK)

f. Click **Send**.

susan@libertymanuals.com: See attached report:MyFirstReport

Send   Cancel

From
To   susan@libertymanuals.com
Subject   See attached report:MyFirstReport
CC
BCC
Attachments   C:\DOCUME~1\SUSANB~1\LOCALS~1\Temp\MyFirstReport.pdf

A Font...   B I U

Dear Susan -

Here is my first report.

Regards,

•The report is formed and the send email window opens with the report attached.

26. Close the email window—or send yourself a test email. And while you're at it, send me a copy! I'll be sure to email you back a congratulatory note for getting this far!*

COLOR IT!
Note that these file types support color as well as black and white type. That means you can put your color logo on a report and email it to your customer.

27. Click **Color**.

•The red *My Registrations* title is changed to black.

28. Click **Color** again.

•The Registrations title is set back to red.

POST IT!

You can also post these files on your web site.

•The PDF format works very well for this. Just put the link on your web page and store the actual file on the server.

•The HTML format opens in your browser. To see the underlying HTML, go to the browser Top Menu > View > Source (IE) or Page Source (Firefox).†

EXCEL NOTE

When composing a report to be transferred to Excel, you will want to take that format into consideration. This report, for example, would require a fair amount of modifying in Excel, because of the location of its total fields, among other things.

29. If possible, print a copy of the report, now. You will find the print–out handy to use as a reference for the following exercises.

•Press CTRL + P or click the Print button on the Reports Toolbar.

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*. My email address is susan@LibertyManuals.com. I've heard from lots of you over the years and I enjoy each one.

†. I'm no HTML expert, but I assume (dangerous, I know!) that you can copy and paste the code into your web page. -SHB