

## Chapter 5.

# *Reports, Letters and Labels*



***Please the client – please the boss – please yourself ...***

*Everyone will be happy with the reports you create with Alpha Five. The power of a database is the multitude of ways the data can be viewed. Paper, PDF, Excel or the cloud – Alpha Five reports go wherever you send them.*

*So get ready for brilliance – you'll be shining in no time!*

## Overview

Another long chapter packed with information. 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.

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Part 1. The basics of report design	
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## Preparation for the Lesson.

Open Alpha Five and navigate to the following file:

- c:\A5\_MadeEasyDesktopBook\ABC\_DesktopLessons\ABC Seminars.adb\*



- 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 as noted on the opposite page.

## Learning Report Basics

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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.

There are two types of reports, Layout Table and Free Form. As is to be expected, each has its advantages.

### FREE FORM REPORTS

Free Form is the classic style. It is very powerful and is excellent for printed and PDF reports due to its flexible format.

### LAYOUT TABLE REPORTS

Layout Table is the newest report style. While it can be used as a stand alone report, its primary use is for exporting data to Excel and as the basis of a Linked Report.

### SUB-REPORTS

Sub-Reports can be placed in Free Form reports to give added design flexibility.

### LINKED REPORTS

Linked Reports are a type of sub-report with even more functionality than standard ones because their calculations can be added to the main report. This style can be used in both Free Form and Layout Table reports.

### QUICK REPORT GENIE

The Quick Report Genie is the starting point for both Free Form reports and Layout Table reports (optional for the first and required for the second). It can even transmit data directly to Excel and can be saved for future use.

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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!

## LETTERS, LABELS & ENVELOPES

Let's not forget snail mail! You can easily prepare personalized letters and send them on their way with labels and envelopes.

## Comparing the report styles

Here is a side-by-side comparison of Free Form (left) and Layout Table (right) reports. Both used the Quick Reports Genie as a starting point.

My Registrations by Seminar							
As of: 19 November 2011							
00001	Get Outta DOS Marriott Courtyard Fort Lauderdale Plantation Open date: 10/17/2001						
Reg ID	Last Name	Reg Date	Paid Date	Number	Rate	Amt Due	Amt Pd
00001	Anderson	08/08/2001		2	129.00	258.00	258.00
00006	Appleton-Smith	08/13/2001	08/21/2001	1	129.00	129.00	129.00
00007	Bush	08/06/2001	08/06/2001	2	129.00	258.00	258.00
00038	Greenfield			4			
00003	Haton	08/11/2001	09/01/2011	2	149.95	299.90	299.90
00004	Hendrickson	08/23/2001		1	129.00	129.00	129.00
00005	Steele	08/05/2001	08/13/2001	1	129.00	129.00	129.00
00002	Thompson	08/10/2001	08/14/2001	1	129.00	129.00	129.00
Total for: 00001				14	1,331.90	944.90	387.00
00002	Get Outta DOS Marriott Courtyard Lincoln/Red Bank Open date: 02/09/2002						
Reg ID	Last Name	Reg Date	Paid Date	Number	Rate	Amt Due	Amt Pd
00016	Anderson	01/20/2002	01/25/2002	1	169.00	169.00	169.00
00022	Appleton-Smith	01/10/2002	01/10/2002	2	169.00	338.00	169.00
00010	Gleason	01/20/2002	01/20/2001	1	159.00	159.00	159.00
00015	Gleason	01/25/2002	01/25/2002	1	169.00	169.00	169.00
00026	Gleason	01/04/2002	01/04/2002	1	169.00	169.00	169.00
00008	Hendrickson	01/02/2002	01/15/2002	2	159.00	318.00	318.00
00009	Williams	01/11/2002	01/11/2002	1	159.00	159.00	159.00
Total for: 00002				9	1,481.00	1312.00	169.00
00003	Get Outta DOS Marriott Courtyard Galleria Open date: 06/07/2002						
Reg ID	Last Name	Reg Date	Paid Date	Number	Rate	Amt Due	Amt Pd
00013		05/23/2002	05/23/2002	1	169.00	169.00	169.00
00024	Anderson	04/12/2002	04/18/2002	5	169.00	845.00	169.00
00019	Bush	04/21/2002	04/30/2002	2	169.00	338.00	338.00
00025	Campbell	05/08/2002	05/08/2002	2	169.00	338.00	338.00
00011	Frome	05/21/2002	05/21/2002	2	199.00	398.00	398.00
00020	Steele	05/25/2002	05/25/2002	1	199.00	199.00	199.00
Total for: 00003				16	1,979.00	1,979.00	1,979.00
MyRegistrations.F Page 1 of 3 11/19/2011							
Registrations by Seminar							
00001 Get Outta DOS Open Date: 10/17/2001							
Reg ID	Last Name	Reg Date	Date Pd	No Pers	Rate	Amt Pd	Cancelled?
00001	Anderson	08/08/2001	/ /	2	129.00		.T.
00006	Appleton-Smith	08/13/2001	08/21/2001	1	129.00	129.00	.F.
00007	Bush	08/06/2001	08/06/2001	2	129.00	258.00	.F.
00038	Greenfield	/ /	/ /	4			.F.
00003	Haton	08/11/2001	09/01/2011	2	149.95	299.90	.F.
00004	Hendrickson	08/23/2001	/ /	1	129.00		.T.
00005	Steele	08/05/2001	08/13/2001	1	129.00	129.00	.F.
00002	Thompson	08/10/2001	08/14/2001	1	129.00	129.00	.F.
Seminar Id Total				14	944.90		
00002 Get Outta DOS Open Date: 02/09/2002							
Reg ID	Last Name	Reg Date	Date Pd	No Pers	Rate	Amt Pd	Cancelled?
00016	Anderson	01/20/2002	01/25/2002	1	169.00	169.00	.F.
00022	Appleton-Smith	01/10/2002	01/10/2002	2	169.00	169.00	.F.
00010	Gleason	01/20/2002	01/20/2001	1	159.00	159.00	.F.
00015	Gleason	01/25/2002	01/25/2002	1	169.00	169.00	.F.
00026	Gleason	01/04/2002	01/04/2002	1	169.00	169.00	.F.
00008	Hendrickson	01/02/2002	01/15/2002	2	159.00	318.00	.F.
00009	Williams	01/11/2002	01/11/2002	1	159.00	159.00	.F.
Seminar Id Total				9	1,312.00		
00003 Get Outta DOS Open Date: 06/07/2002							
Reg ID	Last Name	Reg Date	Date Pd	No Pers	Rate	Amt Pd	Cancelled?
00013		05/23/2002	05/23/2002	1	169.00	169.00	.F.
00024	Anderson	04/12/2002	04/18/2002	5	169.00	169.00	.F.
00019	Bush	04/21/2002	04/30/2002	2	169.00	338.00	.F.
00025	Campbell	05/08/2002	05/08/2002	2	169.00	338.00	.F.
00011	Frome	05/21/2002	05/21/2002	2	199.00	398.00	.F.
00020	Steele	05/25/2002	05/25/2002	1	199.00	199.00	.F.
00012	Thompson	04/15/2002	04/25/2002	1	169.00	169.00	.F.
00017	Williams	05/20/2002	05/20/2002	2	199.00	199.00	.F.
Seminar Id Total				16	1,979.00		
00004 Get Into Alpha 5! Open Date: 10/08/2002							
Reg ID	Last Name	Reg Date	Date Pd	No Pers	Rate	Amt Pd	Cancelled?
00023	Appleton-Smith	08/30/2002	09/13/2002	2	269.00	538.00	.F.
00027	Appleton-Smith	06/06/2008	06/06/2008	3	765.00	765.00	.F.
00018	Bush	08/30/2002	09/15/2002	2	269.00	538.00	.F.
00014	Campbell	09/12/2002	09/12/2002	3	269.00	807.00	.F.
Registrations.T				1			12/07/2011

## LINKED REPORTS

Linked reports can be added to both Free Form and Layout Table reports.

Client ID	Enter Date	Last Name	First Name	MI	Company	City	State
00006	10/10/2001	Anderson	Joan	H	Anderson & Associates	Minneapolis	MN
Reg ID	Seminar Title	Reg Date	Date Pd	No Persons	Rate	Amt Pd	
00001	Get Outta DOS	08/08/2001		2	129.00		
00024	Get Outta DOS	04/12/2002	04/18/2002	5	169.00	169.00	
00033	Get Into Alpha 5!	03/05/2004	03/15/2000	2	550.00	200.00	
Report Total				9		369.00	
00009	12/04/2001	Anderson	William	H	Anderson & Associates	Tacoma	WA
Reg ID	Seminar Title	Reg Date	Date Pd	No Persons	Rate	Amt Pd	
00016	Get Outta DOS	01/20/2002	01/25/2002	1	169.00	169.00	
00029	ABC Seminars	06/22/2008	06/15/2008	1	650.00	650.00	
Report Total				2		819.00	
00007	10/14/2001	Appleton-Smith	Betsy	R	Red River Inn	Red River	TX
Reg ID	Seminar Title	Reg Date	Date Pd	No Persons	Rate	Amt Pd	
00006	Get Outta DOS	08/13/2001	08/21/2001	1	129.00	129.00	
00022	Get Outta DOS	01/10/2002	01/10/2002	2	169.00	169.00	
00023	Get Into Alpha 5!	08/30/2002	09/13/2002	2	269.00	538.00	
00027	Get Into Alpha 5!	06/06/2008	06/06/2008	3	765.00	765.00	
00032	Get Into Alpha 5!	05/06/2007	06/06/2007	2	550.00	1,100.00	
Report Total				10		2,701.00	

00007 ABC Seminars Marriott Courtyard Galleria Open date: 05/01/2009								
Reg ID	Last Name	Reg_Date	Paid Date	Number	Rate	Amt Due	Amt Pd	Bal Due
00006	Steele	02/05/2009	02/05/2009	5	750.00	3,750.00		3,750.00
Total for: 00007				5		3,750.00	0.00	3,750.00
Report Total				67		19,663.90	11302.90	8,361.00
Cancelled registrations								
Name		Seminar ID						
Hendrickson, Mary G		00001						
Anderson, Joan M		00001						
MyRegistration#F								

Page 2 of 3

12/16/2011

SUB-REPORTS

Only Free Form reports can have Sub-reports. In this case, the Sub-report is showing the cancellations for all seminars (yellow).

Our study will begin with the Quick Report Genie. We will use it as the basis for a Free Form report which, in turn, will show the fundamentals of the Report Editor. Then we will move on to Layout Tables, Sub-Reports, Linked Reports and other layouts like letters.

Understanding the Quick Report Genie

The Quick Report Genie makes the initial selection of fields and groups very simple. It is optional for Free Form reports and is required for Layout Table reports. First, we will go over the elements and then we will use it to create both report styles.

My Registrations by Seminar			
00001			
Reg ID	Last Name	Reg_Date	Paid Date
00001	Anderson	08/08/2001	
00006	Appleton-Smith	08/13/2001	08/21/2001

• Reports are organized into sections. We'll go into them in detail later, but the screen shot at left gives a quick overview. Most reports will have a title, many have one or more groups (in this case, the attendees are organized by seminar) and almost all reports have a detail section with the data (in this case, a list of persons attending the seminars).

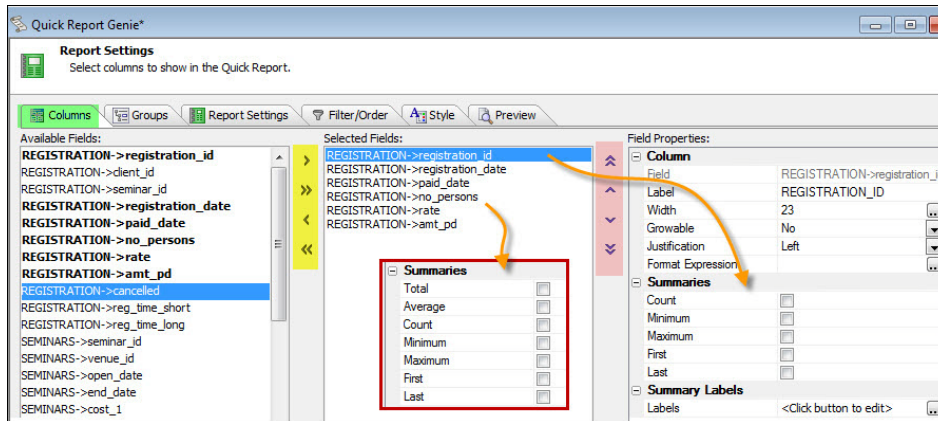


- 1. Alpha Five Control Panel Tab: **Reports.**
- 2. Click the **New** button.
- 3. *Data Source:* **registration\_rept.set**
- 4. *Method:* Choose **Use Quick Report.** (Click OK)

Please review the following carefully because it contains important information.

- The Quick Report Genie has six tabs, *Columns, Groups, Report Settings, Filter/Order, Style* and *Preview*. First we will look them over and then put them to use.





Dialog: Quick Report Genie

## COLUMNS

(See Labels and Detail above.)

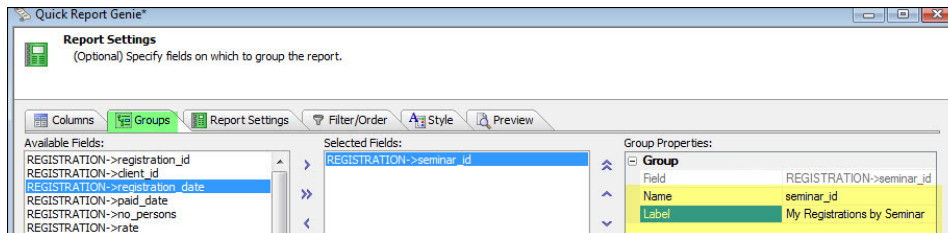
- All the fields in the table/set are listed in *Available Fields*.
- The fields that will appear on the report are added to *Selected Fields* by double clicking or using the arrows (yellow).
- *Selected Fields*: The listing is ordered with the arrows on the right (pink).
- Characteristics for each selected field are defined in the

*Field Properties* window. The “Summaries” options depend on the field type of the field – character, numeric, etc.

- Character and date fields: Count, Minimum, Maximum, First, Last.
- Numeric fields: Total, Average, Count, Minimum, Maximum, First, Last.

## GROUPS

Reports can be organized by fields. In the coming exercise, we will show registrations by seminar.



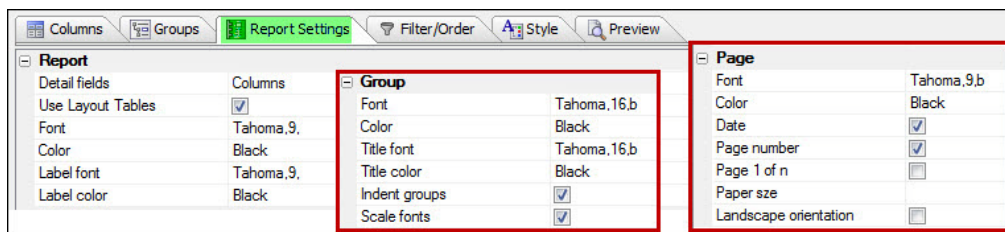
- Field selection for groups follows the same process as for columns. However, this time, instead of being bolded in *Available Fields*, the field is removed from the list.
- When the field is moved into *Selected Fields*, the

*Name* and *Label* entries are filled in with the field name. You can change them, but keep the following in mind:

- *Name*: Required entry. No spaces allowed.
- *Label*: Placed in the section above the group.

## REPORT TITLE

Since we have only one group, the above *Label* will be placed in the Report Header and become the title of the report. If your report doesn’t have a group, you can create one in the Report Editor.



## REPORT SETTINGS

Defines the look of the report itself and its groups.

REGISTRATION_ID	Clients->Last Name	SEMINAR_ID
00004	Hendrickson	00001
00002	Thompson	00001
00005	Steele	00001
00001	Anderson	00001

Clients->COMPANY	Vantage Industries Inc.
Clients->ADDRESS_1	1645 Mountain Highway
Clients->CITY	Redmond

Columns

Rows

• **Font and Color:** Field formatting for the detail fields.

• **Label font and Label color:** Label formatting.

• **Group section:** Governs formatting and layout of groups.

REGISTRATION_ID	Clients->Last Name	SEMINAR_ID	REGISTRATION_DATE	PAID_DATE	NO_PERSONS
00004	Compbell	00004	08/13/2000	08/13/2000	1
00001	Burke	00004	08/13/2000	08/13/2000	1
11/08/2001					1

• **Page section:** Adds date and/or page number. Font and color determine their appearance (at left, we set the *Color* to Red. Appears at BOTTOM of page.

Quick Report Genie®

**Report Settings**  
Filter and order settings for report.

Columns Groups Report Settings **Filter/Order** Style Preview

Specify the filter and order expression for the report.

Filter:

Order:

Clients->last\_name

**Order Builder**

Order By

Set the order in which records will be sorted.

Sort by: Clients->last\_name A...Z

then, sort by: A...Z

then, sort by: A...Z

## FILTER/ORDER

Define the filter and/or ordering parameters.

• To use the Filter Builder and Order Builders, click the arrows (red circles).

Columns Groups Report Settings **Style** Preview

**Invoice**

Information

Invoice # 000001 John Baker

Date 01/10/2007

Sales Rep Delanowitz 87 Hicksville Rd

Delivery AM Delivery Hicksville, NY 11801

Payment by MCard

Customer Id 0000055

**Shipping**

John Baker

87 Hicksville Rd

Hicksville, NY 11801

**Invoice**

Invoice # 000001 John Baker

Date 01/10/2007

Sales Rep Delanowitz 87 Hicksville Rd

Delivery AM Delivery Hicksville, NY 11801

Payment by MCard

Customer Id 0000055

**Items**

Description	Price	Quantity	Extension
ProTech Bike Helmet	47.11	1	47.11
TrueNorth Compass	18.84	1	18.84
Baker's 40 # Rating	20.05	1	20.05
Baker's 40 # Rating	5.88	1	5.88

## STYLE

There are two styles available, Minimal and Section Borders. You can also add alternating color to the rows and change the color from blue to gray, olive or tan. *Layout Tables* only.

• **Report Settings tab:**

Use Layout Tables = Yes.

Columns Groups Report Settings **Filter/Order** **Style** **Preview**

**My Registrations by Seminar**

**00001**

REGISTRATION_ID	SEMINAR_ID	REGISTRATION_DATE	PAID_DATE	NO_PERSONS	RATE	AMT_PD
00001	00001	08/08/2001		2	129.00	
00006	00001	08/13/2001	08/21/2001	1	129.00	129.00
00007	00001	08/06/2001	08/06/2001	2	129.00	258.00

## PREVIEW

Watch your report develop as you go along. You can also export to Excel or email the report from this window (see “Understanding the preview toolbar” on page 204).

## Saving the Quick Report settings

After the report settings have been defined in the Quick Report Genie, the next step is to go to the report editor (*Open in Report Editor* button on the toolbar). Once that has been done, the Quick Report Genie will no longer be available. You can, however, save the settings themselves for future use.

We really like being able to save the genie, at least while developing a report because some things are easier to do there than at the report editor. Of course, you can't do everything in the genie and once you start editing at the report editor, it may lose its value.

To save the Quick Report Genie settings, see "Switching to the Free Form Report Editor" on page 203 and "Switching to the Layout Table Report Editor" on page 239.

- Now that you understand how the genie works, let's set up our first Free Form report. We will also save a copy of the Genie settings.

## Using the Quick Report Genie to create a Free Form report

- This section continues from the previous one. The *Quick Report Genie* should be open.

Free Form reports give you complete control over the layout. You can set up simple or very complicated designs. They are ideal for printed (hard copy, PDF) reports, but are **not** suitable for transfer to Excel.\*

We begin with a Free Form report so that you can see all the design features of the Report Editor. While you can go straight to the editor for new reports, the genie will definitely get you off to a faster start.



1. Referring to the screen shot for "Columns" on page 198, read the explanations for *Width*, *Format Expression* and *Summaries* below and then set the following parameters.

Table	Field	Label	Width	Justify	Format Expression	Summary
Registration	Registration_ID	Reg ID	Size to Fit	Left	<value>	
Clients	Last_Name	Last Name	25	Left	<value>	
Registration	Registration_date	Reg Date	15	Left	12/31/2004	
Registration	Paid_date	Pd Date	15	Left	12/31/2004	
Registration	No_Persons	Number	10	Center	<value>	Total
Registration	Rate	Rate	10	Right	123,456.78	Total
Registration	Amt_Pd	Amt Pd	10	Right	123,456.78	Total

### WIDTH

The width of the field can be defined as follows:

- a. Default: Sized large enough to accommodate the field name that appears as the label. Often this can be shortened.
- b. Define manually by entering a number.

\*. Use Layout Table reports for Excel. See "Creating a Layout Table Report" on page 236.



c. Click the button and choose **Size to Fit**.

•Notice the *Size all Columns to Fit* button.

**SIZE TO FIT** Our experiments with *Size to Fit* produced mixed results, working well sometimes, but not others. Below is a comparison of manual sizing and *Size all Columns to fit*.

The image shows two side-by-side report preview windows. The left window, titled 'Manual sizing for each column', shows a report with columns of varying widths. The right window, titled 'Size to Fit for all columns', shows the same report with all columns adjusted to fit their content. An arrow points from the 'Size all Columns to Fit' button in the left window's 'Set Column Width' dialog to the right window.

**Manual sizing for each column**

Reg ID	Last Name	Reg Date	Paid Date	Number	Rate	Amt Pd
00001	Anderson	08/08/2001		2	129.00	
00006	Appleton-Smith	08/13/2001	08/21/2001	1	129.00	129.00
00007	Bush	08/06/2001	08/06/2001	2	129.00	258.00

**Size to Fit for all columns**

Reg ID	Last Name	Reg Date	Paid Date	Number	Rate	Amt Pd
00001	Anderson	08/08/201		2	129.00	
00006	Appleton-Smith	08/13/201	08/21/201	1	129.00	129.00
00007	Bush	08/06/201	08/06/201	2	129.00	258.00

The image shows the 'Format Expression' dialog box. The 'Display Format' field contains the expression: `alltrim(str( convert_type(<value>,"N"),250,2,""))`. Below the dialog, a 'Pre-Defined Formats' list shows various options, with '123,456.78' selected.

## FORMAT EXPRESSION

Use the following process to select predefined formats.

- Selected Fields:** Click on the field to select it.
- Format Expression:** Click the button.
- Click the **Select Pre-Defined Format** button.
- Choose the format in the table; i. e. Rate = 123,456.78.

•Bug fix: It seems that once you select a format for one field, it is likely to appear in others. Select the ones you care about (date and numeric fields as above), then go back over each field and enter `<value>` where you want just the field contents to appear.

## SUMMARIES

We want to see the totals for the No\_Persons, Rate and Amt\_Due fields. Here's where to look for them at Preview.

<b>00007</b>						
Reg ID	Last Name	Reg Date	Paid Date	Number	Rate	Amt Pd
00036	Steele	02/05/2009	02/05/2009	5	750.00	
Seminar ID Total				5	750.00	0.00
Report Total				67	9009.95	11302.90

•**Group totals** are under each group. Label is determined by name of group. Can be modified in the Report Editor.

•**Report total** is on the last page. Gives totals for entire report.

• Now that we have some work done, let's save the Quick Report.

2. CTRL + S or click Save to save as **My Quick Registrations**.

•Using a convention such as starting the genie saves with "Quick" will make these stand out from those made at the report editor.

## Creating a group

We want to show the registrations by seminar, rather than in one long list. The selection process is simple enough, but there is one serious caution.

- **Name:** Required field. The *Name* will default to the field name. You can change it, but be sure there are no spaces in the new one.
  - **Label:** The Label will become the title of the report and it can be anything you like. Spaces are allowed.
    - Refer to screen shot for “Groups” on page 198.\*
3. *Group* tab: Place **Registrations** -> **Seminar\_id** in *Selected Fields*.
  4. Properties: *Name*<sup>†</sup>: **Seminar\_ID**; *Label*: **My Registrations by Seminar**.
    - The label for the group will become the title of the report.

## Ordering the report

We want to show the registrations in last name order.

5. *Filter/Order* tab: Click the arrow. *Sort by*: **Last\_name**.
  - Screen shot: see “Filter/Order” on page 199.

## Defining the appearance

Both the Report Settings and Style tabs affect the appearance of the report. For this exercises, we will not make any Style changes (the default is “Minimal”). We will, however make some edits at Report Settings.

### REPORT

6. *Report Settings* tab: Edit as below. Accept other defaults.
  - *Detail fields*: **Columns**.
  - *Use Layout Tables*: **No**.
  - *Label color*: **Dark Green**.

### GROUP

- You can type this in directly or click the button and choose the color.
- *Font*: **Ariel,14,b**.
  - You can type this in or click the button to select font style and size. Once you click the button, the original entry is removed.
  - **Bolding**: Add a **,b** so it appears as above.

### PAGE

- *Color*: **Brown**.
- *Title color*: **Red**.
- *Color*: **Blue**.
- *Date*: **Yes**.
- *Page number*: **Yes**.

---

\*. We changed the capitalization to distinguish the group name from the field. You may keep the default, **seminar\_id**, if you wish.

†. If you are already familiar with the Report Editor, this will appear as the *Label* for the Group. See “Writing summary expressions” on page 224.

---

**My Registrations by Seminar**

00001

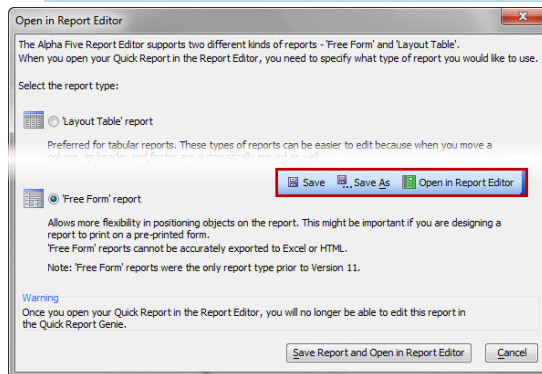
Reg ID	Last Name	Reg_Date	Paid Date	Numbre	Rate	Amt Pd
00001	Anderson	08/08/2001		2	129.00	
00006	Appleton-Smith	08/13/2001	08/21/2001	1	129.00	129.00
00007	Bush	08/06/2001	08/06/2001	2	129.00	258.00
00004	Hendrickson	08/23/2001		1	129.00	
00005	Steele	08/05/2001	08/13/2001	1	129.00	129.00
00002	Thompson	08/10/2001	08/14/2001	1	129.00	129.00
<b>Seminar ID Total</b>				14	923.95	944.90

11/09/2011 2

## Previewing the report

Now we will take a look at what we have so far.

- The *report title* is red.
- The *group header* is brown. The default value is the Seminar\_id field. We will change that at the report editor.
- The *column labels* and *group totals* are green, as is the *report total* (see last page).
- The *detail fields* are black.
- Each page has a *date* and *page number* in blue (at bottom).



## Switching to the Free Form Report Editor

Next, we will take our first look at the report editor. Before leaving the Quick Report Genie, however, we will save it so we can use it again later. (Inset: toolbar buttons)

7. Click *Save* to keep the Genie settings:

•**MyQuickFreeForm.**

8. Click *Save As...* to save it under the report name:

•**MyRegFreeForm.**

9. Click *Open in Report Editor.*

- The layout will be saved and opened as *MyRegistrationsLayout*.

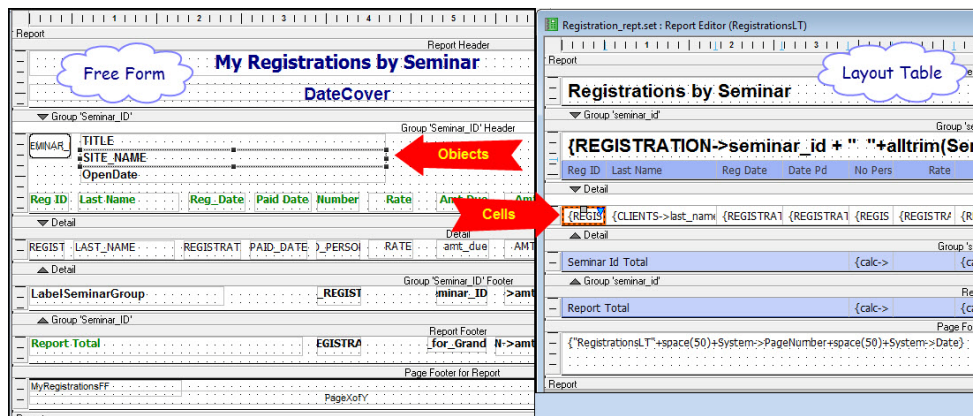
10. Click OK to open the Report Editor.

## Understanding the Report Editor

### FREE FORM & LAYOUT TABLE REPORTS

- This section continues from the previous one. MyRegistrationsLayout should be open in Design mode.

The same report editor is used for both Free Form and Layout Table reports. There is, however, a difference in the appearance at Design mode.



At left are the Design mode views of the reports shown on page 196.

•**Free Form** reports: Fields and labels appear as objects. They may placed “freely” on the form.

•**Layout Table** reports: Fields and labels appear as cells that are locked into rows and columns.

As noted above in green, this section applies to both styles, as do “Examining the Report Editor Sections” on page 209, “Viewing and Changing Calculated Fields” on page 228, “Filtering and Ordering Reports” on page 229 and “Understanding Linked Reports” on page 247. The sections that specifically apply to one style or the other are also clearly marked.

## 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!)

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.



1. 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.

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

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.

- a. Click the  button on the toolbar.
- b. Make any changes and click the Print Preview button  to return.

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



WORD TO THE WISE



IMPORTANT NOTE

to most computer systems. This means recipients do not need Alpha Five installed on their computers to read your reports.



- The first group of buttons are for viewing pages in the report.
- The second group is for printing the report: *Print* and *Print Setup*
- The third group gives options for viewing the report on screen.
  - *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. Click to Zoom In or Out.
  - *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 colored areas of the report off/on.

YOUR REPORT BFF



- The Exit Preview button returns to report design mode.
- The next button takes you to the Alpha Five control panel.

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

- Even though Excel is given as an option, do not use it for Free Form reports because the style does not maintain spreadsheet columns and cells properly. Layout Table reports (page 236) are designed for sending data to Excel.

Our purpose at this time is to give an overview of the features available. There is further discussion in “Creating Letters” on page 259.

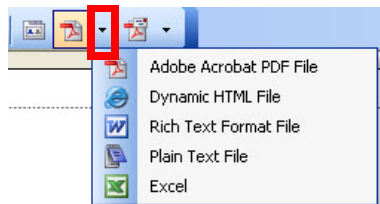


- Selections are made at the final two “multiple choice” buttons.
  - The one on the left saves the report in one of the above formats to a specified directory.
  - The second forms the report in the selected format and opens a Send Email form, with the report attached.

 **SAVE FIRST!**

If you have not saved the report, you will get an error message at the next step advising you to return to return design mode and save the report before you can continue.

SAVE AS FORMATS



- Adobe Acrobat PDF. Most users have *Adobe Acrobat Reader* on their computers. It is also available as a free download at [www.adobe.com](http://www.adobe.com). The PDF driver is built-into Alpha Five, so you do not need a separate program to create PDF files.

2. 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.)

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





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



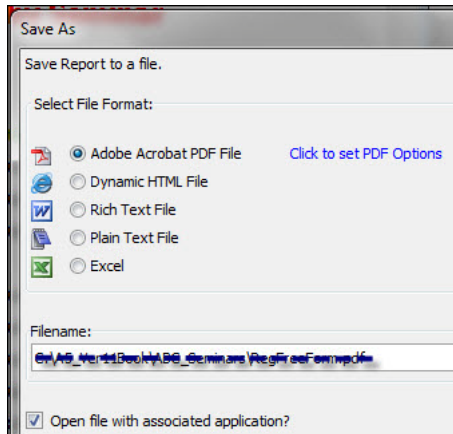
•Rich Text File. This can be read and edited by users of *Microsoft Word* and *Corel WordPerfect*.



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



• Excel File: Report will open in Microsoft Excel, as a spreadsheet. *Layout Table reports only.*



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

- Click the current button or its drop down arrow.
- Choose the desired format (default is current button, but you can change).
- 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.

3. Choose *Adobe Acrobat PDF File* and return to *Alpha Five*.\*

4. *File name:*

- C:\A5\_MadeEasyDesktopBook\ABC\_DesktopLessons\Samples\MyRegFreeForm.pdf

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

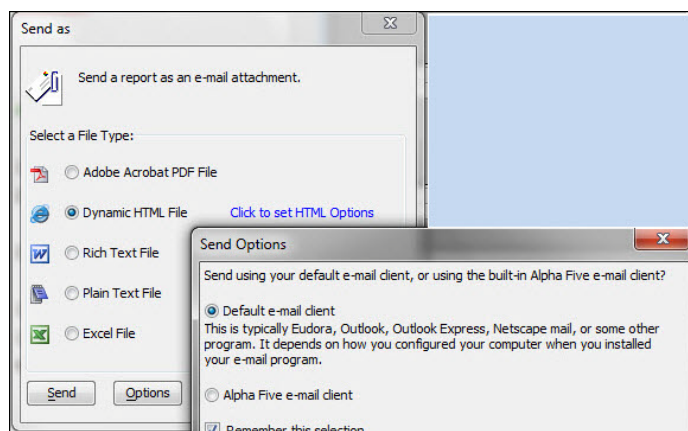
Reg ID	Last Name	Reg Date	Paid Date	Numbe	Rate	Amt Pd
00001	Anderson	08/08/2001		2	129.00	
00006	Appleton-Smith	08/13/2001	08/21/2001	1	129.00	129.00
00007	Bush	08/06/2001	08/06/2001	2	129.00	258.00

6. Click OK.

- 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.

7. Close the **Acrobat** file.

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



### SEND EMAIL ATTACHMENT\*

The process for creating 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. We will 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.
- c. Click the **Options** button.

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

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

f. Click **Send**.

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

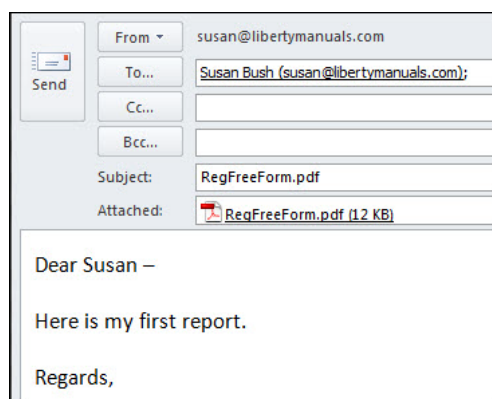
8. Close the email window—or send yourself a test email. And while you're at it, send me a copy! I'll be sure to email you back a congratulatory note for getting this far!<sup>†</sup>

9. Click **Color**.

- The red *My Registrations by Seminar* title is changed to black.

10. Click **Color** again.

- The 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).<sup>‡</sup>

11. 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.



\*. 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.)

†. 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