

Chapter 4.

Design it your way!



Make your own road ...

Free-form reports allow design without restriction. Print or PDF format, this classic handles any terrain.

In this chapter ...

Here's what you find here.

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Special notes

FREE-FORM OR LAYOUT TABLE?

For the most part, this chapter is about how to design Free-form reports. However, as we said in “Understanding the Report Editor” on page 25, both styles use the same Report Editor. Therefore, the discussions on header, detail and footer sections also apply to Layout Tables, as does the information on the Expression Builder, Properties Pane, calculations and filers.

Think of it this way. If we refer to objects, it is Free-form only. The rest probably applies to both – although there are some exceptions! You’ll understand better after you do Chapter 5.

DROP FIELDS DIALOG

As fields are added to the report, the *Drop Fields* dialog may pop-up. Unless otherwise instructed to do so, accept the default settings and click *Finish*.

Customizing Reports

FREE-FORM & LAYOUT TABLE

You can customize reports in two ways: starting from a blank report or by using a Quick Report as the foundation. The same principles apply to both.

In the next exercises, we will modify the Quick Report we created earlier. We will improve its appearance and give the reader additional information.

The main goal of this chapter is to give you a full understanding of the various sections that make up the design space of the Report Editor. We will take the sections one at a time, working from top to bottom.



IMPORTANT NOTE

The next several exercises will use a copy of the *MyRegFreeForm* that we created in step 29 on page 25 and will save as *MyRegistrationsFF* in step 1 below.

- If you did not do that exercise, open *RegFreeForm* and make a copy of it instead.



1. *Control Panel > Reports Tab*: Open **MyRegFreeForm** in Design mode. Save it as **MyRegistrationsFF**.

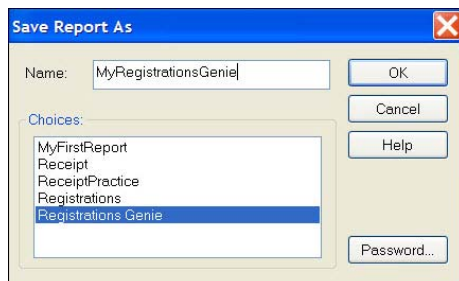
- With the report open, choose File > Save As.

- The Save As box opens with a list of existing reports based on the registration_reports set.

- **Name**: MyRegistrationsFF.



Use *Save As* to create a duplicate report at any time. This method is especially useful when you are testing and like your edits to a certain point, but want to experiment further and not lose what is already working well. If you like the original design, **be sure to save it first** before creating the copy!



REPORT PASSWORD

You can also set a password at the above dialog to prevent unauthorized users from accessing the report.

Modifying the Report Header

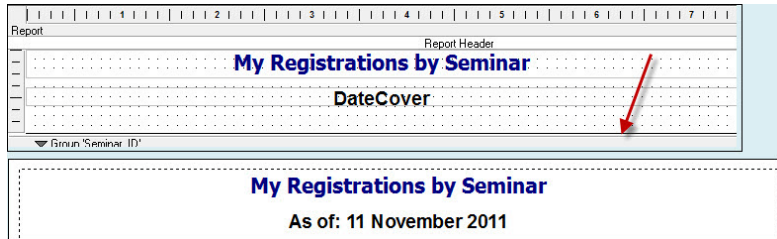
FREE-FORM OR LAYOUT TABLE?

The discussion on objects is Free-form only. The information on enlarging the sections, calculations and the Expression Builder applies to both.

- This section continues from the previous one. The *MyRegistrationsFF* report should be open in Design mode.*

COMPLETED REPORT

The completed report for this segment is **RegistrationsFF**.



The Report Header is used to describe the contents of the report. Our report already has a title and we will add an “as of” date and then format both.

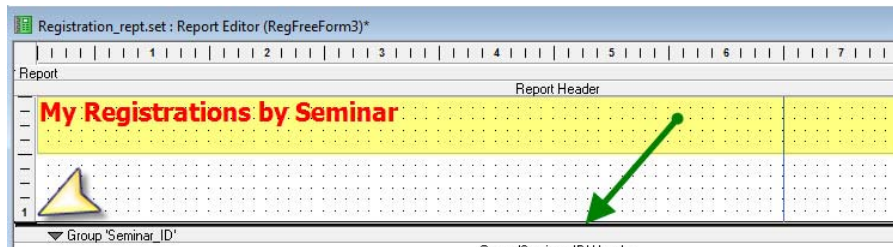
The screen shots at left show what we’re after, so keep them in mind as you do the following exercises.



PROPERTIES PANE

You should know all about using the Properties Pane, if not, go back to page 52. Return after you’ve done your homework!

- Reminder: If the pane is not visible, go to *Top Menu > Task List > Properties* or click on the *Properties* tab at the upper left of the design window.



First, we will make the title wider and then we will make more room in the section.

1. Select and then drag the right side of the title to the full width of the report (yellow).

2. Click on the Report Header section band (green arrow) and drag it down to about the 1 inch mark on the side ruler (gold arrow).

Adding a Calculated Field

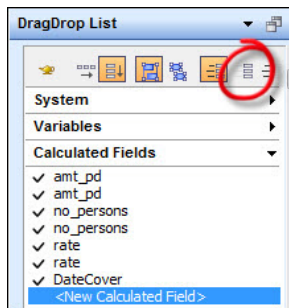
We will use the *System Date* to give the user the date that the report was pre-viewed on screen or sent to a printer or PDF file.

- The System Date is today’s date and its function is **Date()**.[†]

There are several date conversion functions that put dates in just about any format you can think of. Here are two popular ones.

*. If you are not continuing from the previous segment, please see “Important note” on page 67.

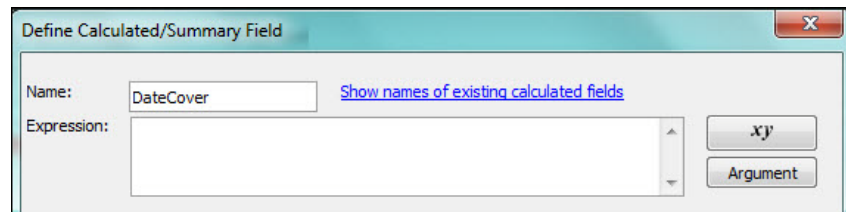
†. Functions are used in writing Alpha Anywhere expressions. To learn more about them, see *Alpha Five Functions Handbook* and the *Alpha Five Functions Directory*, both by Susan Hussey Bush. Available a www.libertymanuals.com.



• **DMY** = 10 November 2011 and **MDY** = November 10, 2011
We will use DMY and combine it with text, so it will read: m

• **As of 14 November 2009.**

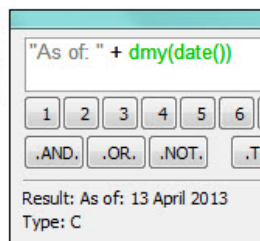
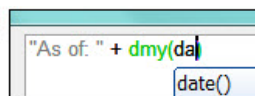
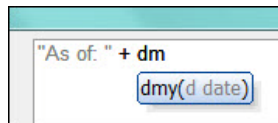
- The complete expression will be: **“As of: “+DMY(**`DATE()`**”**
- 3. *DragDrop List*: Choose Fields only (circled).
- 4. *DragDrop List*: Drag **<New Calculated Field>** below the title.
 - The Define Calculated/Summary Field genie pops up. We will enter the name here and then go to the Expression Builder for the expression.
- 5. *Name*: **DateCover**.
- 6. Click the XY button.



Using the Expression Builder

The Expression Builder is where Alpha Anywhere expressions are created by using a combination of text, fields and functions.*

7. Enter the following in the workspace:



- a. Type: **“As of: ”+**

- In Alpha Anywhere, text is surrounded by double quotes.
- Be sure to include a space after the colon [:]

- b. Type: **dm**

- As soon as you start typing, bubble help appears with the syntax for possible functions.

- c. Press **DN ARROW** to select **dmy(date)**.

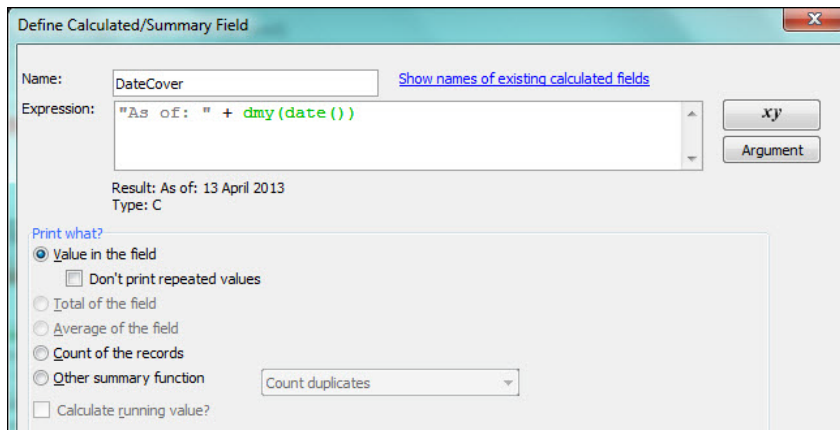
- d. Type: **da**

- e. When the syntax comes up, press **DN ARROW** to select **date()**.

When the expression is completed correctly, the results show below the window:

- **Result:** As of: 13 April 2013 (actually, it will be the system date of *your* computer).

*. The Expression Builder is explained in detail in *Alpha Anywhere Made Easy* and *Alpha Five Web Applications Made Easy*, both by Susan Hussey Bush. Available at www.libertymanuals.com.



f. Click OK to return to the initial window.

- The expression could also be entered directly here.

- Note the Summary options available.

g. Click OK.

Adjusting object size and formatting

WIDTH

If you went to Preview now, you would see that the calculated field object is not wide enough to show the entire date for longer months. We'll adjust it.

PROPERTIES PANE: DATECOVER

FIELD

- Width: 30.**

- The exact size doesn't matter. Just make it large enough to handle the worst case scenario.

8. Drag the *DateCover* field to about the 3/4" mark on the side ruler.

ALIGN, CENTER & FORMAT

Now we will widen the date field and align it with the title and format both objects.

9. Click the *title* object and then SHIFT + CLICK the *DateCover* field.

10. Set the following for both object using the toolbars.

TEXT TOOLBAR:
ARRANGE TOOLBAR

- Dark Blue, Bold, Center.
- Align Width; Left Align.

- We want them to have different font sizes.

TEXT TOOLBAR

11. Select the objects in order and change each as follows:

- Title object: *Size = 16.*
- Date object: *Size = 14.*

12. Modify the height of the **Date object** to fit the font size. One snap should do it.

13. **Save and preview.**

14. Look things over. When finished, click **Exit Preview.**

Modifying the Group Header

FREE-FORM ONLY

- This segment continues from the previous one. *MyRegistrationsFF* should be open in Design Mode.*

COMPLETED REPORT

The completed report for this segment is **RegistrationsFF**.

Group 'Seminar_ID' Header						
EMINAR	TITLE	SITE_NAME	OpenDate	Reg_ID	Last Name	Reg_Date
				Paid Date	Numbe	Rate
					Amt Pd	
▼ Detail						
00001	Get Outta DOS	Marriott Courtyard Fort Lauderdale Plantation	Open date: 10/17/2011			

Next, we will modify the group header so that it is more descriptive.

Here's what we're after, so keep these screen shots in mind as you do the following steps.

1. Enlarge the **Group Seminar ID Header** to approximately 1 inch.

Group 'Seminar_ID' Header						
SEMINAR_ID	Grp_Expr_Seminar_ID	Reg_ID	Last Name	Reg_Date	Paid Date	Numbe
		Rate	Amt Pd			
▼ Detail						

2. Click the **rule** next to the Column Titles and drag down to the section divider.

- They will turn blue as you begin to drag them.

3. Move them to about the 3/4" mark.

BORDER

We use borders for ID numbers on most of our reports to eliminate the need for labels. Our end users get used to looking for the boxes, so a label is unnecessary. We'll format the text at the same time.

4. Hover over the **brown Seminar_id** object to see its Calculated Field name as assigned by the Quick Report Genie:
Grp_Expr_Seminar_ID.

PROPERTIES PANE: GRP_EXPR_SEMINAR_ID

BORDER

- *Style*: **Small-rounded-single line**.

FONT

- *Color*: **Black**.
- *Size*: **8**.

LAYOUT

- *Align*: **Center**
- *Vertical align*: **Center**

5. Select and drag the handles to make it smaller – just large enough to hold the ID number – about 1/4" h x 1/2" w. Place in upper left corner.

- Now we will add three more fields. When the Drop Fields dialog opens, accept the defaults.

6. DragDrop List:

- a. Drag the **Seminars > Title** field next to the ID box.
- b. Drag the **Venue > Site_Name** field below *Seminars > Title*.

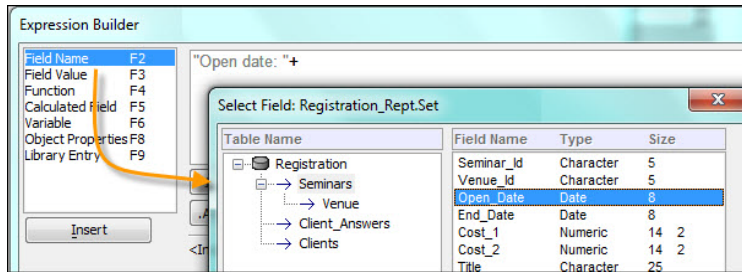
*. If you are not continuing from the previous segment, please see "Important note" on page 67.

c. Drag a <New Calculated Field> onto the report below *Site_name*.

7. Define as follows:

- **Name:** **OpenDate**.

- **Expression:** “Open date: “+Seminars->Open_Date



a. Click the **XY** button to open the Expression Builder.

b. Type: “**Open date:**” +

c. *Left pane:* Double click **Field Name F2** (or press F2)

d. *Table name:* **Seminars**.

e. *Field name:* **Open_date**.

f. Click **Insert**.

g. Click OK (twice).

Formatting multiple objects

A few quick adjustments will have this section finished. We will adjust the formatting for all three fields at the same time.

8. **SHIFT + CLICK** **Title**, **Site_Name** and **OpenDate**.

- **Bold**, **Size = 10 pt**.

9. Modify the width and length of the fields and place them according to the screen shot on page 71.

- To make the length of all match the longest one, select it first and then **SHIFT + CLICK** the others. The first selection leads the way for the others.

a. Click **Site_name**.

b. **SHIFT + CLICK** **Title** and **OpenDate**.

10. Move the column titles just below the **OpenDate** field object.



11. Move the section **separator bar up** to just below the column titles.

12. **CTRL + S** to save and go to **Preview**.

13. **Inspect**. When finished, click **Exit Preview**.

TEXT TOOLBAR

Modifying the Detail Section

FREE-FORM & LAYOUT TABLE?

The discussion on objects is for Free-form reports only, however the information on calculations applies to both.

- This segment continues from the previous one. *MyRegistrationsFF* should be open in Design Mode.*

*. If you are not continuing from the previous segment, please see “Important note” on page 67.

COMPLETED REPORT

The completed report for this segment is **RegistrationsFF**.

Our detail will be more complete if we show the *amount due* and *balance due*.

Reg ID	Last Name	Reg Date	Paid Date	Number	Rate	Amt Due	Amt Pd	Bal Due
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

In this case, the screen shots also show the titles which are technically in the Group section because we will need to add new labels for the new calculated fields. The Detail fields are in yellow.

Creating simple numeric calculations

Alpha Anywhere uses the common windows symbols for addition (+), Subtraction (-), Multiplication (*) and Division (/).

- Next we will add two new calculated fields. The first, **Amt Due**, will show us how much is due from the client. The second, **Balance Due**, will base its expression on the first.

AMT DUE

The amount due is calculated by multiplying the number of persons registered by each person times the rate of the seminar.

14. Drag a <New Calculated Field> after the **Amt_Pd** field.

- Position does not have to be exact. We'll adjust it later.

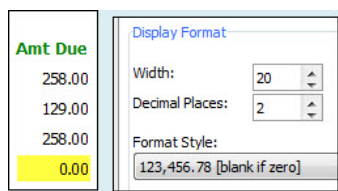
a. Name: **amt_due**. Click the **XY** button.

b. Expression: **No_Persons * Rate**

- Press F2 to open the fields list and select Registration -> No_persons. (Click Insert)
- You can also type it in the workspace.

c. Click OK (twice).

15. Make the object a bit smaller and move it next to **amt_pd**.



BLANK ZEROS

By default, Alpha Anywhere shows all values for calculated fields. We want to blank out the ones with zeros.

- This is one of those times where we need the Object Properties dialog.

OBJECT PROPERTIES (F12): AMT_DUE

FORMAT

- Display Format > Format Style: 123,456.78 (blank if zero)

Using a calculated field in an expression

Our next expression uses the calculated field that we just created. Like all other calculations, it has been added to the DragDrop List and can be accessed from the Expression Builder.

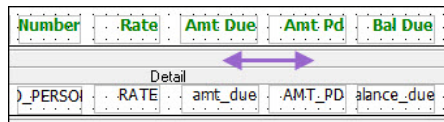
BALANCE DUE

The formula for balance due is the amount due minus the amount paid.

16. Drag another <New Calculated Field> after the **amt_due** field.
 - a. *Name:* **balance_due**; Click the **XY** button.
 - b. Press F5 to access the Calculated Fields.
 - c. Choose **amt_due**. (Click Insert)
 - d. Complete the expression: **Calc->Amt_Due - Amt_Pd**
17. Click OK (twice).
18. Repeat “Blank zeros” above.
19. *Toolbox: Text control:* Make labels for the new fields.
 - a. Select the Text control and draw a box on the report.
 - b. If necessary, double click the text object to activate the editor.
 - c. Type in the label as in *Amt Due*.
20. Reposition the **Amt_due** and **Amt_pd** objects for better flow (arrow below).
 - Be sure to move their summaries in the Group and Report Footers, too.

Refining height and position of objects

You have all the skills you need to make the final adjustments. Go to Preview as you work and be sure that all objects are large enough to hold the text or data.



21. Use the following tools to make your screen look like the screen shot at left.

- Dynamic guidelines
- Snap to Grid by pressing the ARROW keys.
- Arrange, Text and Copy toolbars.
 - **Amt_pd** and **Bal_due**: Make the fields the same size as Amt_due.
 - **No_persons**: Make the label a bit wider. Center the text and label.
 - *Numeric fields* and labels: Right align all.
- Micro moves (p. 60).

DESIGN PRINCIPLES

Keep the following design principles in mind as you work:

LEFT ALIGN

Character and date fields (ID, name, dates, etc.) should be aligned to the left side of the object.

RIGHT ALIGN

Numeric fields: Align labels to the right side of the object.

22. **CTRL + S** to Save.
23. Go to **Preview** to check your work
24. When finished, click **Exit Preview**.

Modifying the Group and Report Footers

FREE-FORM OR LAYOUT TABLE?

The discussion on objects is for Free-form only, however the information on Summaries applies to both.

- This segment continues from the previous one. **MyRegistrationsFF** should be open in Design Mode.*

COMPLETED REPORT

The completed report for this segment is **RegistrationsFF**.

Group and Report Footers can carry just about any objects you want to place in them. They are primarily used, however, for summaries – such as the total of a numeric field.

Expressions can seem complicated to write,† but when you place them in group or report footers, Alpha Anywhere will do most of the work. In this exercise, we will create summaries for the *amt_due* and *balance_due* columns.

Group 'Seminar_ID' Footer							
LabelSeminarGroup		REGIST	seminar_ID	>amt_pd	seminar_ID		
Group 'Seminar_ID'							
Report Footer							
Report Total		EGISTRA	for_Grand	11->amt_pd	for_Grand		
00036	Steele	02/05/2009	02/05/2009	5	750.00	3,750.00	3,750.00
Total for: 00007				5	3,750.00	3,750.00	
Report Total				67	19,663.90	11302.90	8,361.00

- Group Footer: Summaries for the seminar (yellow).
- Report Footer: Summaries for the entire report (pink).

We will make easy work of the job by using the *Drop Fields* dialog, the quickest and easiest way to create summaries.

Creating a Group summary



1. Drag the **Group 'Seminar_ID'** separator bar down to about the 3/4 inch mark.
2. *DragDrop List*: Drag **Calculated Fields > amt_due** into the Group 'Seminar_ID' footer.

*. If you are not continuing from the previous segment, please see “Important note” on page 67.

†. We'll show you how in “Writing summary expressions” on page 78.