In-depth QCC Print Manager Webinar

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Contents

In-depth QCC Print Manager Webinar

The purpose of this webinar is to expose participants in greater detail to the unique features of the QCC Print Manager Module. There is not sufficient time, however, to cover every topic in detail. Users are referred to the manual **Printing Reports with Print Manager**, published February 2008, for additional information and detailed explanations.

Print Manager Dataform

As discussed in the *Introduction to QCC / Print Manager* webinar, Print Manager is the QCC equivalent of LSPOOL in the traditional environment. However, Print Manager contains many more options and abilities than were present in the traditional LSPOOL. This webinar will deal in greater detail with a number of those additional capabilities.

Topics to be covered include the following:-

• Configuring User Preferences
• User Selection Options
• Other Print Manager Tabs
• Viewing and Managing Print Files
• Printing a Report
• Creating a PDF File
• Opening a File in Word or Excel
• Opening a File with Excel Wizard
• The Grid Output Window
• Downloading Files

Configuring User Preferences Within Print Manager

Preferences are defined on the **File** menu. The following dataform displays when you select the *Preferences* option.
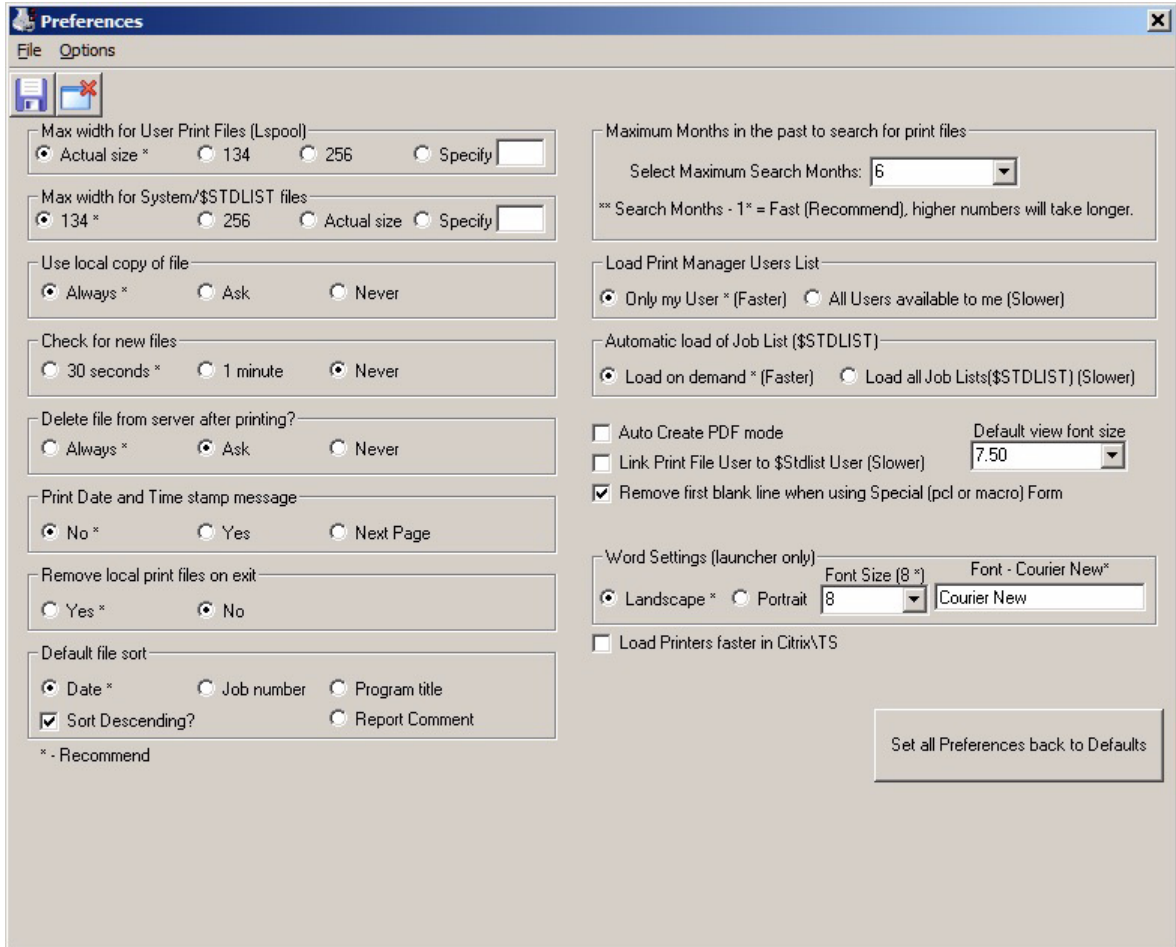
Most of these items are self-explanatory. A few require further explanation.

Delete file from server after printing?	This preference sets the default in relation to the deletion of print files. There is the capability to override this default when selecting a file to print.
Months in the past to limit the search for Print Files	This option limits the number of months that print files will remain in your Print Manager. The choices range from 1 to 60 months with the [Maximum] option being that all of the user's files will be displayed.

Remove first blank line when using Special (pcl or macro form)	Select this check box only if **QSS** instructs you to do so. In some cases, Print Manager adds an extra line while printing POs or other special forms.

Using Print Manager to View Files Created by Other Users

Another selection on the **File** menu is *Select User(s)*. This option, when coupled with the appropriate security clearances, allows you access to the Print Manager files created by other users. When selected, the following dataform appears with a drop-down list of users to whom you have access.
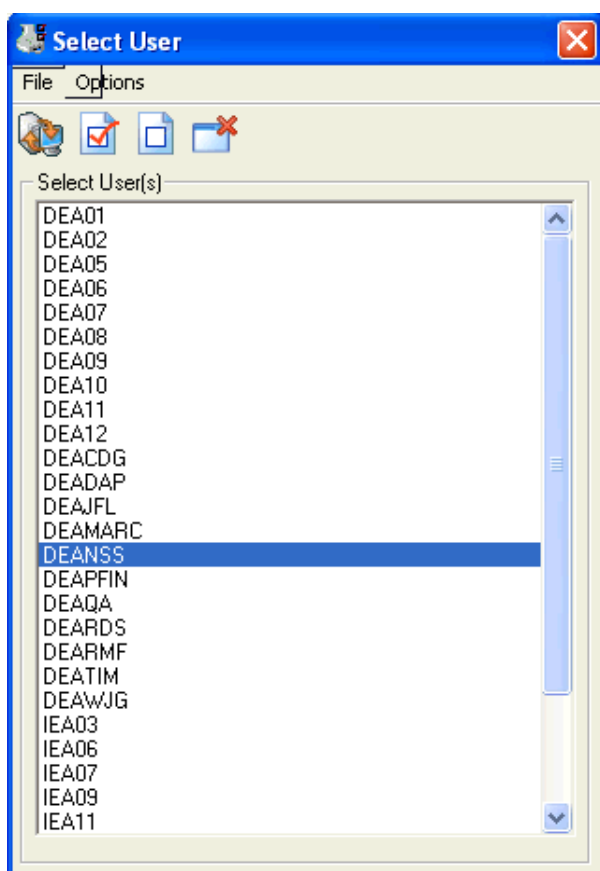
Select the users whose print files you wish to access by clicking on their log-on name. The icons allow you to [Get User(s) Files (Ctrl+F1)], [Select All (Ctrl+F2)], [Select None (Ctrl+F3)], or [Cancel (F12)]. Note that there are hotkey combinations available for each of these selections.

Print File User Selection Options

Incorporated into each user listing in Print Manager are four ways of organizing the data to make report selection easier. In addition to seeing all of the available reports listed on the grid portion of the Print Manager dataform, you can also request the list by date, by job number, by type of report, or by user-defined report title.

When selecting by date, you can click upon a date on the displayed list to have only the reports generated on that date appear in the grid portion of Print Manager.
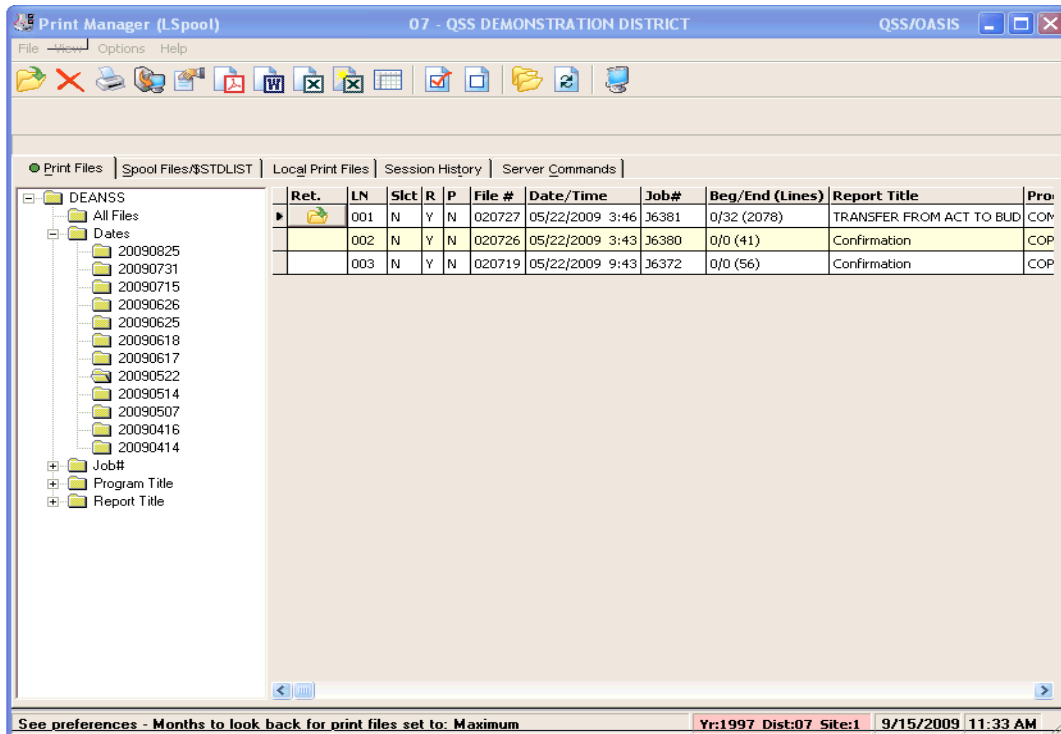
When selecting by [Job Number], the displayed list will include the job numbers of all the reports in your Print Manager.

When selecting by [Program Title], the displayed list will include the various types of reports that you have created. Click on the type report that you are searching for and only listings for those reports will display in the grid area.

Selecting by [Report Title] will produce similar results.

Other Print Manager Tabs

There are four tabs in addition to the *Print Files* tab available in the Print Manager module. A green dot indictes the tab that is currently open.
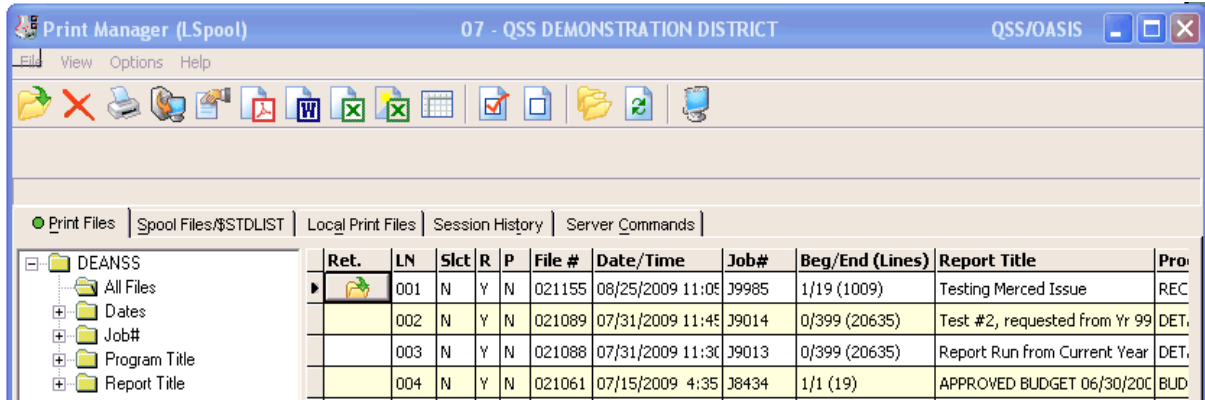
Spool Files/$STDLIST

The *SpoolFiles/$STDLIST* tab contains information on various types of system files that you can now access without having to know special server commands. With access to this tab, you will be able to see how your job ran on the server and all of the parameters that you passed on to the program when you launched the job.
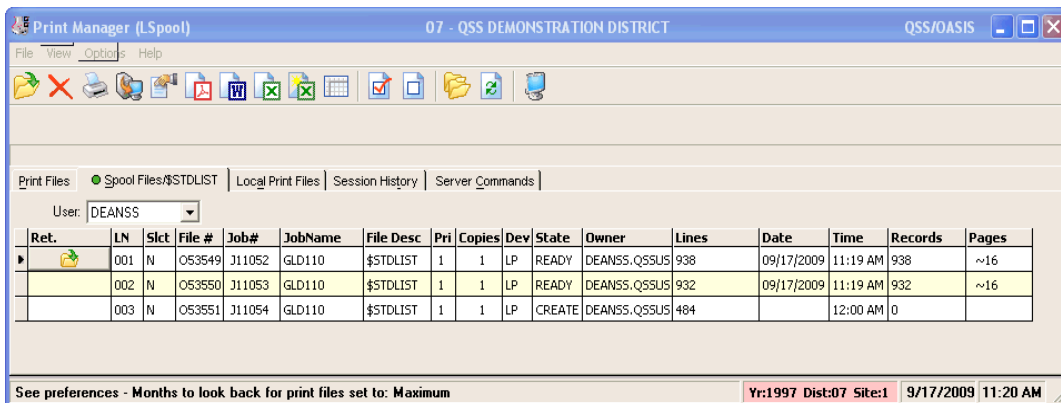
The [User] selection drop-down list above the grid allows you to select the user whose files you wish to review. The list of users to which you have access is controlled by security settings.

Local Print Files

The *Local Print Files* tab shows the print files saved on your PC .

If you set your Preferences on the **File** menu to not remove local files on exit, then these files would remain on the *Local Print Files* tab until you delete them.

To select the type of local file that you wish to view, set the radio button at the top of the tab to [Report files] for regular report files or to [Output/$STDLIST] for spool files created when a job was executed.
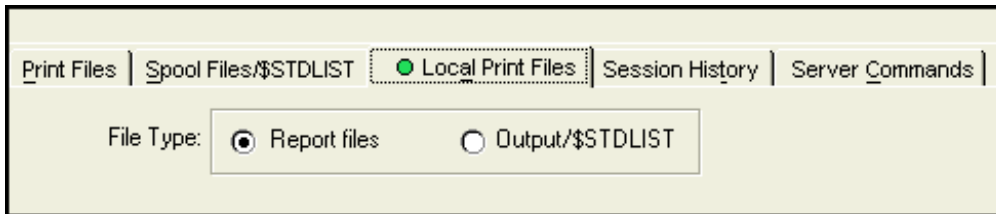
In both cases, the column headings for the file type displayed on the *Local Print Files* tab are similar to those on the main *Print Files* or *Spool Files/$STDLIST* tabs with the addition of a [Local file name] field. The [Local file name] can be used with the search function on your PC to locate the file on your work station.
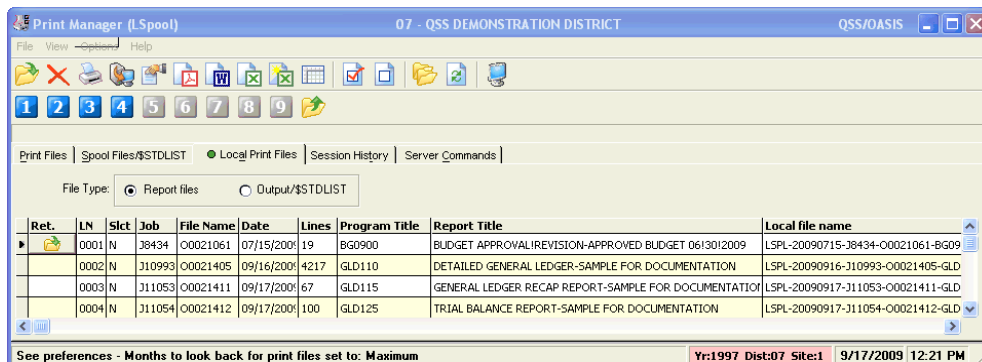
Figure 1: Reports on Local Print Files tab
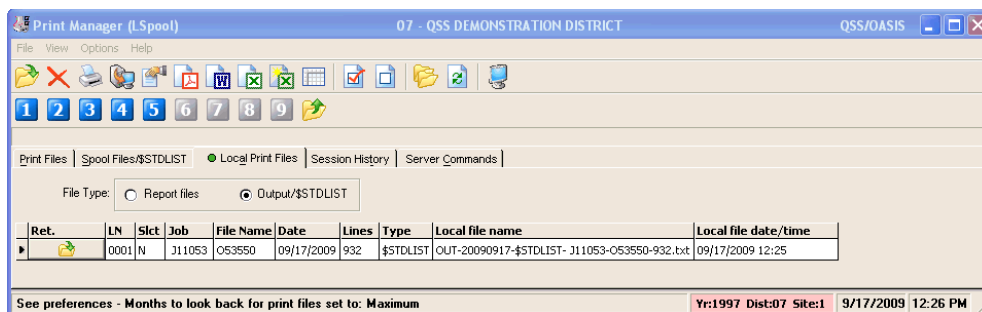
Figure 2: Output/$STDLIST on Local Print Files tab

Session History

The *Session History* tab will display all of the activity that has gone on in this module since you loaded it. Each time the module is loaded the Session History area is blank. Activity is logged only for the session you are currently in.
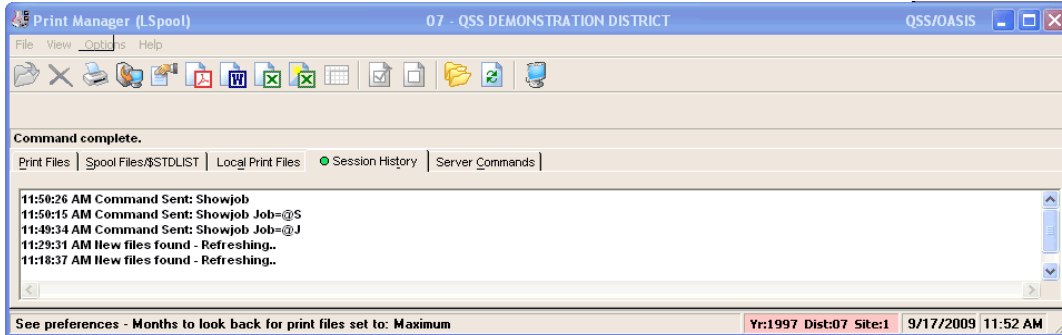
Server Commands

This tab gives you easy access to several common Version H server commands. General access is available to the first three commands, while the other commands are password protected.
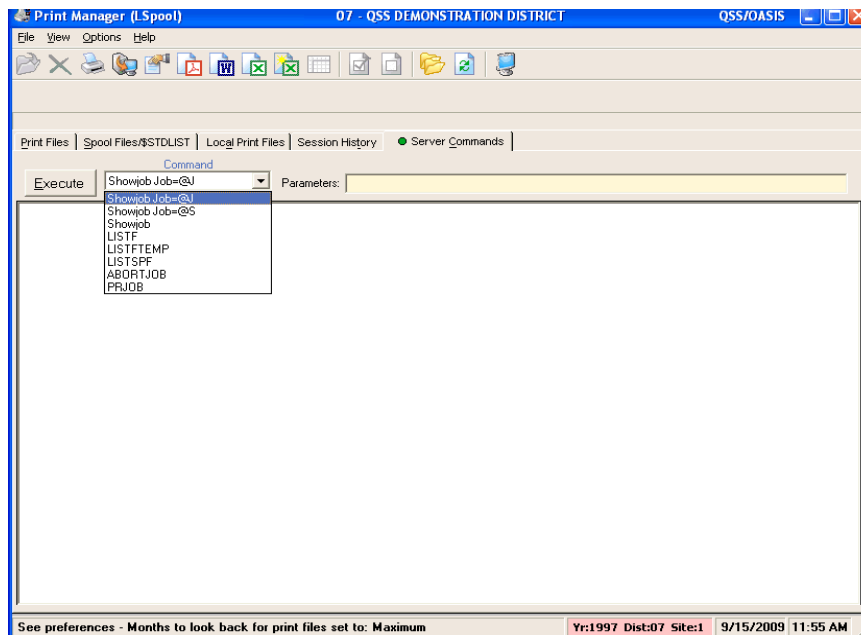
The [Showjob=@J] command is comparable to entering a 'JJ' in the option field of a traditional menu screen to see 'Just the Jobs' that are currently running.

The [Showjob=@S] command is comparable to entering a 'JS' in the option field of a traditional menu screen to see 'Just the Sessions' that are currently running.

The [Showjob] command is comparable to entering a 'J' in the option field of a traditional menu screen to see both the jobs and the sessions that are currently running.
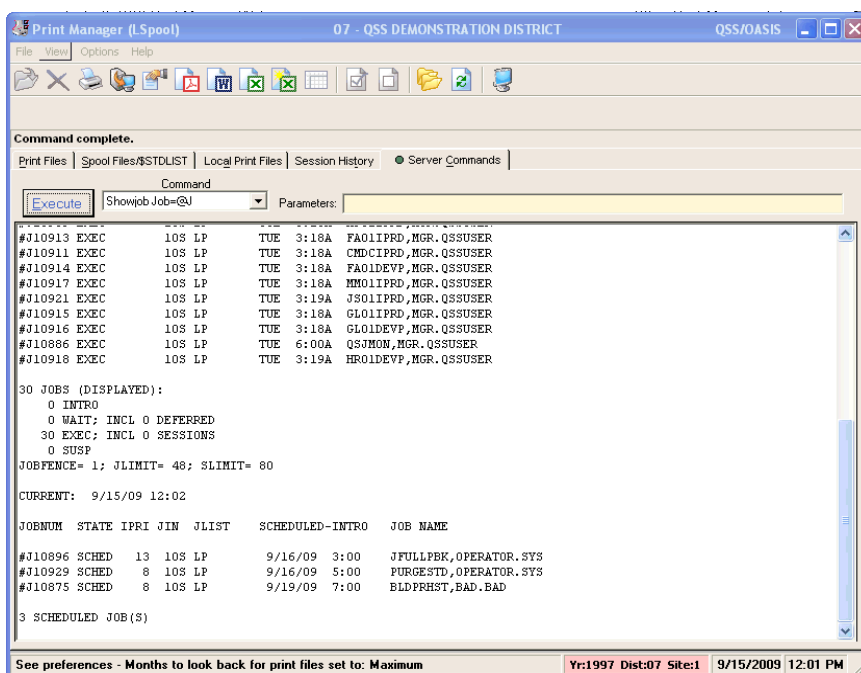
The other server commands listed are available for use by the technical staff and require specific requested parameters and a password in order to execute the command.

Viewing and Managing Print Files

A *View* window opens whenever you open a file from any of the following tabs on the *Print Manager* window:

- Print Files tab
- Spool Files/$STDLIST tab
- Local Print Files tab

To Open a Print File

From any of the three tabs noted above, you can use any one of three different methods to open an item into the *View* window.
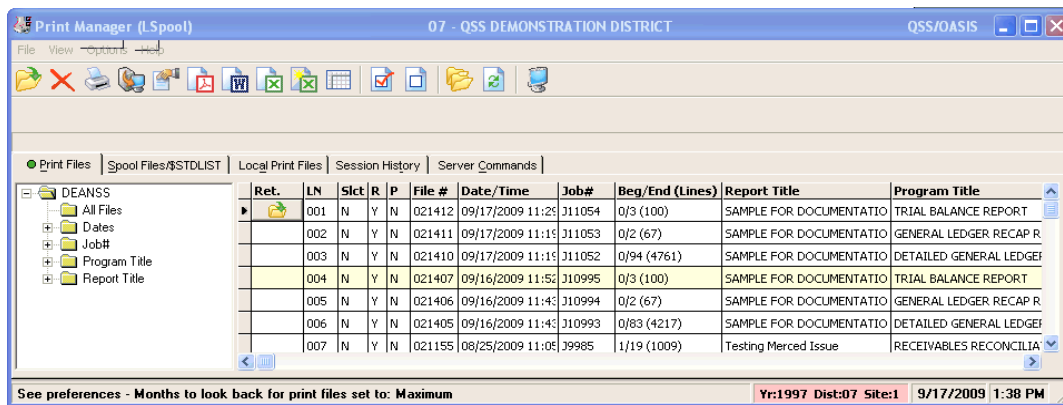
- Single left-click in the [Ret.] column on the yellow open folder. This will open the report or file on that line of the grid. To move the yellow open folder icon to another row, single-click the [Ret.] column for that row.
- Double left-click anywhere other than in the [Ret.] column on the desired row.
- Single right-click anywhere other than in the [Ret.] column on the desired row. This will open a small window which lists several actions that you can take.
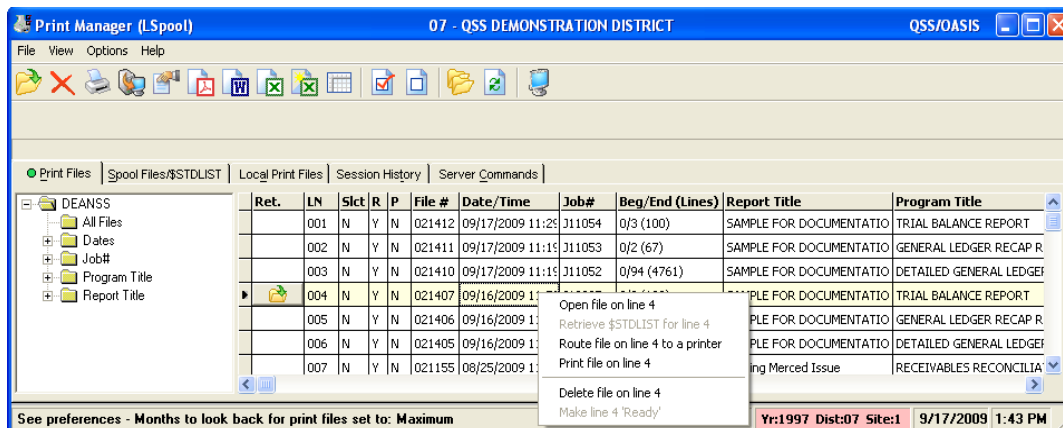
The View Window

The following illustrates the text area for the *View* window. The text area displays the print file or spool file that you selected from the *Print Manager* window. You can use the **Options** menu commands or command icons to resize the text, print the file, or export the file to another Windows application.
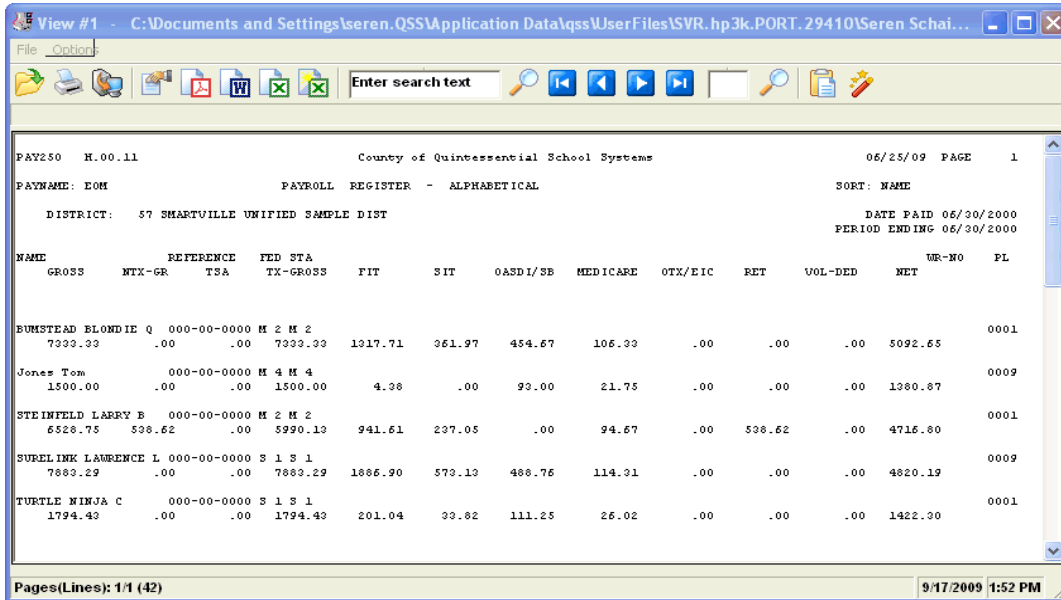
NOTE: Your system administrator can configure Print Manager so that all you can do is display reports, print, and route.

For this limited access, the following commands are grayed out: Download File, Create PDF, Send to Word, Send to Excel, Send to Excel Wizard, and Copy Selection to Clipboard.

Table 2-1: Menu commands and toolbar icons for the *View* window

MENU COMMAND	ICON	KEYBOARD SHORTCUT	PURPOSE
Options | Open...		CTRL+O	Open a new *View* window for the indicated print file.
Options | Print...		CTRL+F11	Print the file to a Windows printer set up for your PC. A *Print Report* dialog box displays.
Options | Route...		CTRL+R	Use Print Manager to route the print file or spool file to a spooled printer on the HP e3000 server. A *Route to Printer* dialog box displays.
Options | Download File...		CTRL+D	Open a *Download* window that allows you to extract data from the file and create a comma- or tab-delimited file for importing the data into a database or spreadsheet.
Options | Create PDF...		CTRL+F	Create a PDF file that contains the file in the current window.
Options | Open in Word...		CTRL+W	Open a new window in Microsoft Word that contains the file in the active *View* window.
Options | Open in Excel...		CTRL+L	Open a new workbook in Microsoft Excel with the contents of the file in the active *View* window. Each line of the file becomes a single column in the spreadsheet.
Options | Open with Excel Wizard...		CTRL+Z	Import the file in the current window into Microsoft Excel with the Text Import Wizard. The wizard allows you to define the column widths and data type for each column.
Options | Search for Text	Enter search text	F3	Search the print file or spool file in the current *View* window. To begin the search, type the search text. The search is not case sensitive, and it does partial word matches.
Options | Search for Text Backwards	none	SHIFT+F3	Search backward in the current file for the search text.
Options | First Page		SHIFT+F5	Go to the beginning of the first line in the file.
Options | Previous Page		F5	Go to the previous page in a print file. This search works only for reports that have standard page numbers on the upper right corner of each page.

Table 2-1: Menu commands and toolbar icons for the *View* window (Continued)

MENU COMMAND	ICON	KEYBOARD SHORTCUT	PURPOSE
**Options	Next Page**		F6	Go to the next page in a print file. This search works only for reports that have standard page numbers in the upper right corner of each page.
**Options	Last Page**		SHIFT+F6	Go to the end of the last line in the file.
**Options	Search for Page**		CTRL+F3	Go to a specific page number in a print file. To do so, type a page number, then do any of the following: click the magnifying glass icon, press CTRL+F3, or press ENTER. This search works only for reports that have standard page numbers on the upper right corner of each page.
**Options	Copy Selection to Clipboard**		CTRL+C	Copy the selected text to the Windows clipboard. You can select text with the mouse or the keyboard equivalents.
**Options	Hide View**		CTRL+H	Hide the current *View* window. The window closes. You can reopen it from the view manager on the *Print Manager* window.

Moving through Text

Whenever the print file or spool file is too large to fit in the *View* window, the text area displays horizontal and vertical scroll bars.

To move through the text, do any of the following:
♦ Use the scroll bars.
♦ Use the standard Windows keys, such as PAGE UP, PAGE DOWN, LEFT ARROW, and RIGHT ARROW.
♦ If you have a wheel mouse, click inside the text area, then use the mouse wheel to scroll through the text.

♦ Search for text with the [Enter search text] [Search for Text] icon.
  ◊ Type the search text.
  ◊ To search forward, press ENTER, press F3, or click the magnifying glass icon.
  ◊ To search backward, press SHIFT+F3.
♦ Move through the pages of a print file with the VCR icons.
  ◊ To go to the first page, click the [First Page] icon or press SHIFT+F5.
  ◊ To go to the next page of a print file, click the [Next Page] icon or press F6.
  ◊ To go to the previous page of a print file, click the [Previous Page] icon or press F5.
  ◊ To go to the end of a file, click the [Last Page] icon or press SHIFT+F6.

♦ Go to a specific page number of a print file with the [Search for Page] icon. Type a page number, then press ENTER, press CTRL+F3, or click the magnifying glass icon.

NOTE: The [Previous Page], [Next Page], and [Search for Page] commands work only on print files with standard page headings. They search for the word PAGE followed by a number in the heading line for print files.

Resizing Text and the View Window

After you open a *View* window, it opens to the default size and displays the print file in the default font size. You can resize both the window and the text that displays in it.

To change the font or window size, do any of the following:
♦ To change the default font size, select a size in the *Preferences* dialog box. By default, the initial font size is 7.5 points. You can change it to anywhere from 2 through 20 points.

♦ To resize the text in the current window, hold down the CTRL key, then rotate the mouse wheel.

♦ To resize the *View* window, use the standard Windows techniques.

Copying and Pasting

You can select all or part of the text in the *View* window, copy it to the Windows clipboard, and then paste the text into another Windows application.

To copy and paste text:
1 Move the cursor to the start of the text you want to copy.

2 Highlight the text to copy in any of the following ways:

◊ Click and hold the left mouse button, then drag the mouse pointer to highlight text.

◊ Press CTRL+A to select the entire file.

◊ Select text line by line with the SHIFT key.

> Press and hold the SHIFT key to anchor the starting point for the selection.
> Press the UP ARROW key to highlight the previous line of text, or press the DOWN ARROW key to highlight the next line of text.
> When you have finished selecting text, release the SHIFT key.

3 Copy the selected text to the Windows clipboard. To do so, click the 📋 [Copy to Clipboard] icon.

4 Navigate to another Windows application and paste the text.

To paste, press CTRL+V or use the appropriate menu command for the application.

Printing a Report

There are two command icons that can be used to print a report:

The [Print] icon (CTRL+F11) opens a *Print Report* dialog box that allows you to print the file or files that you have selected on any printer that you can select from Windows. This printer can be either a networked printer or one that is attached to your PC.

The [Route] icon (CTRL+R) opens a *Route to Printer* dialog box that allows you to route the file or files that you have selected to a spooled printer that is attached to the HP e3000 server at your county or district office. Your reports go into the print queue along with the reports that other people send to the printer.

If you have selected multiple files on the *Print Manager* window, the [Print] and [Route] icons print or route *all* of the selected files.

Print Report Dialog Box
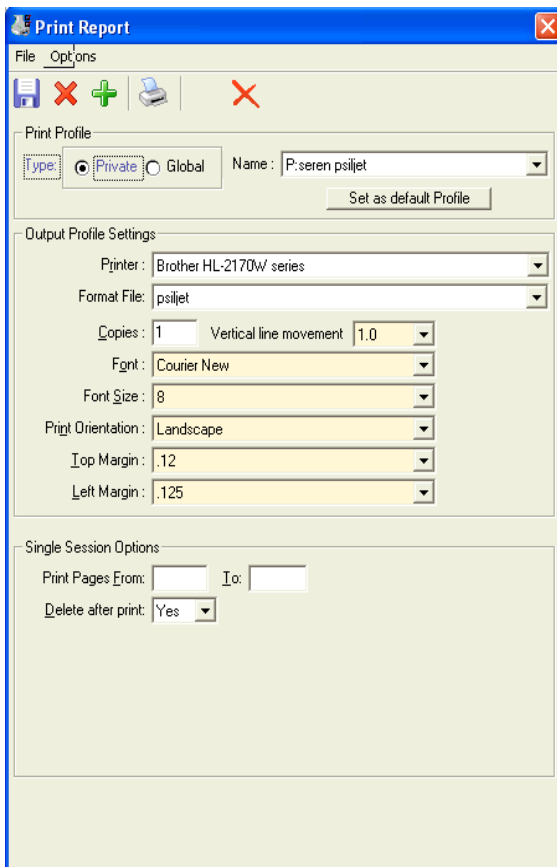
You can open a *Print Report* dialog box from the following places:

- The *Print Files* tab
- The *Spool Files/$STDLIST* tab
- The *Local Print Files* tab
- A *View* window

Table 1-2: Option menu commands and Toolbar icons for the *Print Report* dialog box

OPTION MENU COMMAND	ICON AND KEYBOARD SHORTCUT	PURPOSE
Save Profile	F9	Save the print profile that displays in the **Name** field. The next time you retrieve the print profile, the **Output Print Settings** will look just as they do when you clicked the [Save] button.
Cancel Profile Change	CTRL+F2	Cancel any changes you have made to the print profile on the screen.
New Profile	CTRL+F6	Create a new print profile.
Print	CTRL+F11	Print the selected file or files on a Windows printer selected on the **Printer** drop-down list.
Delete Profile	CTRL+F8	Delete the print profile that you are currently using.

Print Profiles

Print profiles are an option that allows you to save settings for how to print reports. You can specify the printer to use, format file, and number of copies.
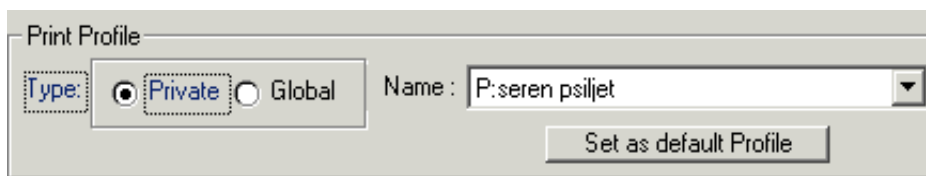
To use a print profile:

1 For the **Type**, select **Private** or **Global**.

A private print profile is only for your user name. A global print profile is one that anyone can use.

2 From the **Name** list, select the print profile that you want to use.

3 Click the ≜ [Print] icon (CTRL+F11).

To add a print profile:

1 For the **Type**, select **Private** or **Global**.

2 Click the 🎲 [New] icon (CTRL+F6).

3 Give the print profile a name.

     A dialog box prompts for the profile name. Type the name and select [OK].

4 Select the **Output Profile Settings** that you want to define this profile. See below for more information about Output Profile Settings.

5 Click the 🖫 [Save] icon (F9) to create the new profile.

To change a print profile:

1 For the **Type**, select **Private** or **Global**.

2 From the **Name** list, select the print profile that you want to change.

3 Make any needed changes to the **Output Profile Settings**. .

4 Click the 🖫 [Save] icon (F9).

To delete a print profile:

1 For the **Type**, select **Private** or **Global**.

2 Select the print profile to delete from the **Name** drop-down list.

3 Click the ✖ [Delete] icon (CTRL+F8).

Output Profile Settings
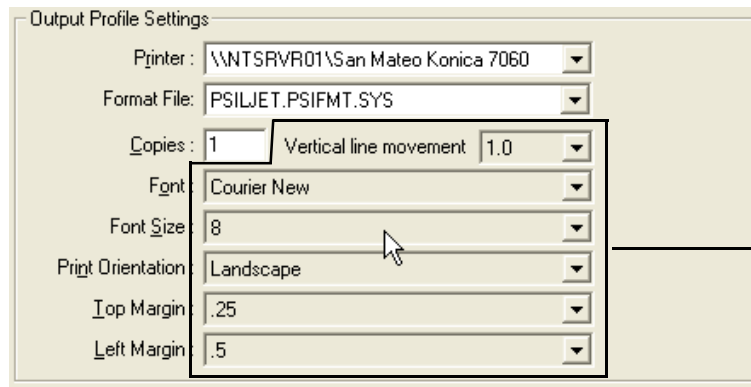
The gray background indicates that these selections are made in the **Format File**, and you cannot change them.

To make these selections yourself, select **No format file selected ** in the **Format File** drop-down list. The background turns white, which means you can change the fields.

Table 1-3: Output Profile Settings for the *Print Report* dialog box

COLUMN	EXPLANATION
Printer	Select a printer from the drop-down list. This list includes all the Windows printers that are set up on your PC.
Format File	Select a format file from the drop-down list. The default format file for your site is selected. You can use the drop-down list to select another format file.
Copies	By default, one copy of the report prints. To print multiple copies, type the number of copies that you want.
	For the remaining fields, the following rules apply. ♦ If you select a format file in the **Name** list, the fields have a gray background, which means they are display-only. The fields display the settings from the format file. ♦ If you select ****No format file selected**** in the **Name** list, the background turns white, which means you can select these options.
Vertical line movement	This option is not presently implemented. You cannot alter the line spacing that was used when the report was created.
Font	The only choice is Courier New.
Font Size	Select a font size from the drop-down list. For landscape printing, 8 points is a good size for most fonts. For portrait printing, use a smaller size, such as 6 points.
Print Orientation	Select **Landscape** or **Portrait** from the drop-down list.
Top Margin	Select the top margin from the drop-down list.
Left Margin	Select the left margin from the drop-down list.

Single Session Options

The **Single Session Options** are options that apply only to the current print job.

Figure 0-1: **Single Session Options** for the *Print Report* dialog box

Table 1-4: Single Session Options for the *Print Report* dialog box

COLUMN	EXPLANATION
Print Pages **From** **To**	Leave blank, or type a range of page numbers.
Delete after print or blank	This box displays only if you get to select whether to keep the print file. If this box does not display, your system has selected one of the following options: • Always keep the print file on the server after printing. • Always delete the print file from the server after printing.

Route to Printer

The *Route to Printer* dialog box opens after you select the [Route] command icon from the *Print Manager* window or a *View* window. This dialog box allows you to route a file to a spooled system printer on the HP e3000 server.
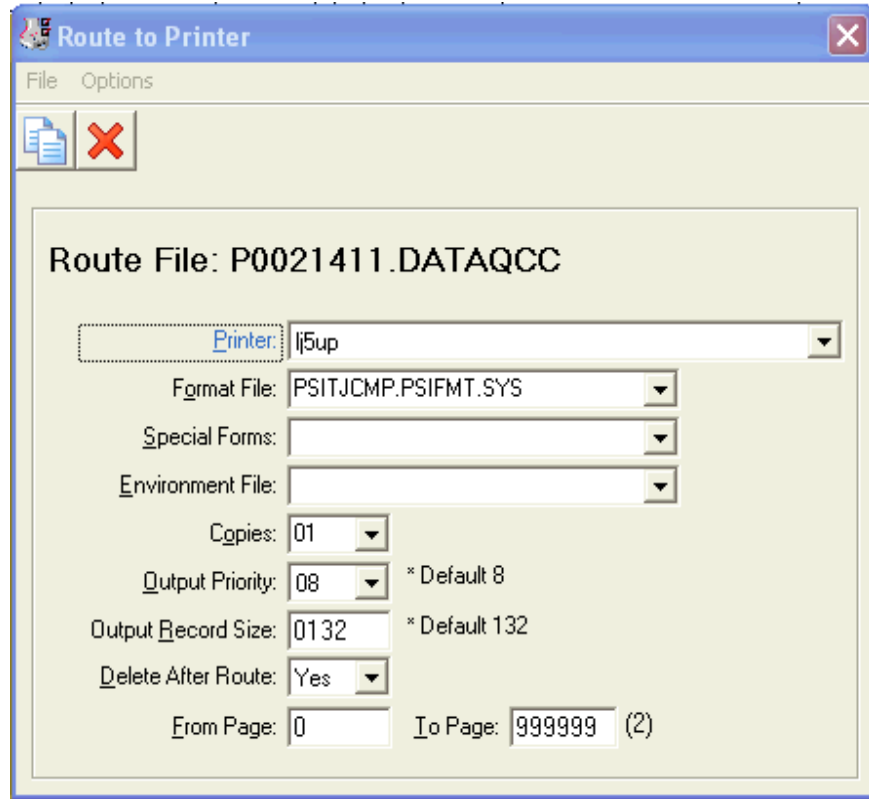
Options for Routing Reports

Table 1-5: Options for routing reports from the *Route to Printer* dialog box

COLUMN	EXPLANATION
Route File	The name of the file being routed displays. ♦ For the *Print Files* tab, the name is the print file produced by Print Manager. This file resides in the account listed in the tab. ♦ For the *Spool Files/$STDLIST tab*, the name is the output file for the $STDLIST for creating a report. ♦ For the *Local Print Files* tab, the name is the job number followed by OUT.HPSPOOL.
Printer	Select a printer from the drop-down list.
Format File	Select a format file from the drop-down list. The default format file for your site is selected. You can do the following: ♦ Select another format file from the drop-down list. ♦ Type the name of a format file to use.

Table 1-5: Options for routing reports from the *Route to Printer* dialog box (Continued)

COLUMN	EXPLANATION
Special Forms	Leave blank, or type a forms message. ♦ Leave blank for reports that print on regular paper. ♦ Type a forms message up to 48 characters long for a print job that requires special forms, such as report cards or mailing labels.
Environment File	Leave blank, or type an environment file. ♦ Leave blank for reports that print on regular paper. ♦ Type a file name up to 26 characters long to use an environment file for controlling specific laser printers.
Copies	Select the number of copies from the drop-down list.
Output Priority	If this list has a shaded background, you cannot change the priority. If this list has a white background, you can change the output priority for print files. In most cases, leave the priority at 8.
Delete After Route or blank	This box displays only if your site allows choosing whether to save or delete print files.
Output Record Size	The default size is 132 characters. You can type a different record size. Change the record size only when special circumstances require it.
From Page To Page	If you want to print only part of the report, type a page range. To print a single page, type the same page number in the **From Page** and **To Page**.

Deleting Print Files

To delete print files, use the [Delete File(s)] icon, the [Ctrl + F8] hot key combination, or the selection on the **Options** menu.

If all of the print files have an N in the [Slct] colum, the only file that will be deleted is the one with the big yellow open folder in its [Ret.] column.

If one or more files have a Y in the [Slct] column, delete those files.

Creating a PDF File

1 A *Create PDF* dialog box displays after you click the ▣ [Create PDF] icon or press CTRL+F.
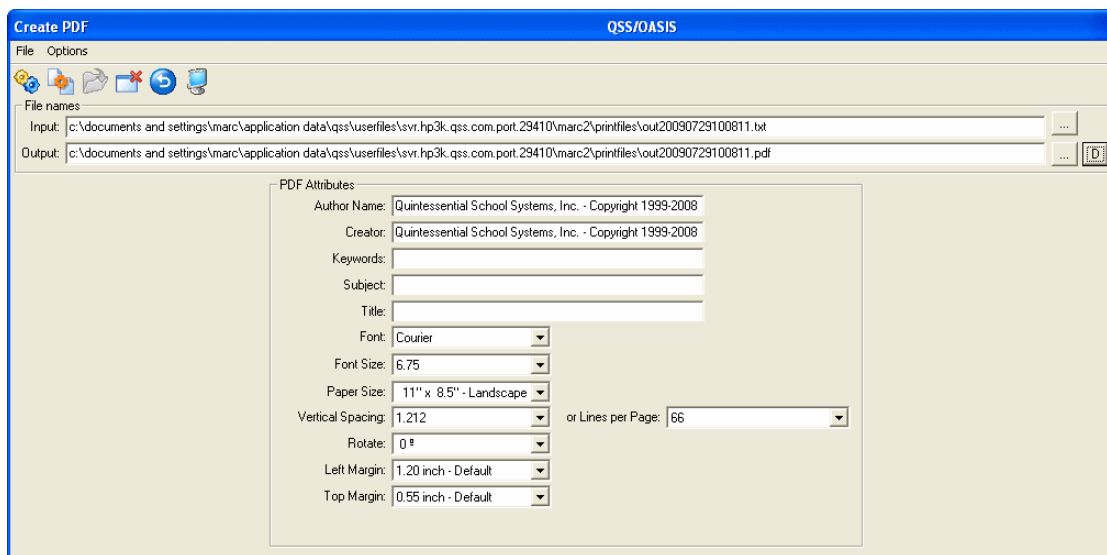
The choices that you type in this dialog box are "sticky":

◊ The **Output** path remains the same until you type another one or clear it by clicking the ⬚ D ⬚ button to reset the default output path.

◊ The **PDF Attributes** remain the same until you type different ones or click the 🔵 (Reset to Defaults [Ctrl+D]) command.

The system saves the options you type and uses them again the next time you log in to QCC.

2 Leave the **Input** file as is.

The box displays the full path to the PrintFiles folder for your QCC user name.

3 For the **Output** file, select the path and the name for the PDF file that you are creating.

Click the box with the three dots to the right of the **Output** file to bring up a *Save PDF As* dialog box.

4 If desired, fill in the optional **Author Name**, **Creator**, **Keywords**, **Subject**, and **Title**.

5 Select a **Font** from the drop-down list.

6 Select a **Font Size** from the drop-down list.

◊ If you are printing landscape (11" x 8-1/2"), use a size like 8 or 8.5 points for the Courier or Courier New fonts.

◊ If you are printing portrait (8-1/2" x 11"), use a size like 6 points or 6.25 points for the Courier or Courier New fonts.

7 Select a **Paper Size** from the drop-down list.

8 Select the **Vertical Spacing** from the drop-down list, or select the number of **Lines per Page**. The two drop-down lists are linked.

The **Lines per Page** and **Vertical Spacing** adjustment allow you to select how much text fits on each page. Thus, you can fine tune the line spacing for special forms, such as warrants or purchase orders.

9 For **Rotate**, select the number of degrees to rotate the print.

10 For **Left Margin**, select how far in from the left side of the page you want each print line to be.

11 For **Top Margin**, select you far down from the top of the page you want the first line to print.

12 Create the PDF file by selecting either the [Create PDF (Ctrl + F1)] or the [Create PDF and Close (F3)] icons or options.

13 If Adobe Acrobat or Adobe Reader is installed on your PC, you can view the PDF file that you have just created.

14 Close the *Create PDF* dialog box.

Opening a File in Word

To send a file to Word, either click the [W] [Open in Word] icon; or press [CTRL+W] from the *Print Manager* window, or press [CTRL+N] from the *View* window; or on the menu bar, click **Options** and **Open in Word**.

If a *Convert File* dialog box opens, select **Text**, then click [OK] to close the dialog box.

A *Microsoft Word* window will open. It contains the full text of the file in the *View* window.

```
07 QSS DEMONSTRATION DISTRICT                    OPEN PURCHASE ORDERS
J7389   POR110   H.00.14 06/17/09 PAGE    1
TESTING VENDOR # ENTRY
Vendor#:000012-000012

            Fund    :01       GENERAL FUND

NUMBER    VENDOR  NAME                        DESCRIPTION
          Line  Fd Bdr Sch Resc Y Goal Func Objt Type         ENCUMBERED
STAT   LIQUIDATED            BALANCE      ENTERED
---------------------------------------------------------------------------
-----------------------------------------------------
010064    000012  Aggressive Accounting
          1. 01-800-500-4230-0-4760-2490-5710-0256            43.60
43.60    03/09/1997

          2. 01-600-110-6500-0-5110-1000-4300-1892            26.73
26.73
                          TOTAL AMOUNT              70.33
0.00          70.33

010081    000012  Aggressive Accounting
          1. 01-800-444-7135-0-3500-0000-8590-0465            46.82
46.82    04/21/1997

123123    000012  Aggressive Accounting       Set up for payments via
trdtnl
          1. 01-000-000-0000-0-0000-0000-4310-0000            46.00
O        46.00                06/30/1997

          2. 01-000-000-0000-0-0000-0000-4300-0000           650.00
O        150.00          500.00
                          TOTAL AMOUNT             696.00
196.00          500.00

*   Account Break                                            813.15
```

Orientation, font, and pitch are set on the Prefernces dialog box on page Page 2.

• For portrait orientation, change the font size to 6 points.
• For landscape orientation, change the font size to 8 points.

```
07 QSS DEMONSTRATION DISTRICT          OPEN PURCHASE ORDERS          J7389   POR110   H.00.14 06/17/09 PAGE    1
TESTING VENDOR # ENTRY                                   Vendor#:000012-000012
          Fund   :01       GENERAL FUND
NUMBER    VENDOR  NAME                      DESCRIPTION
          Line  Fd Bdr Sch Resc Y Goal Func Objt Type   ENCUMBERED  STAT   LIQUIDATED       BALANCE     ENTERED
-----------------------------------------------------------------------------------------------------------
010064    000012  Aggressive Accounting
          1. 01-800-500-4230-0-4760-2490-5710-0256        43.60                                43.60   03/09/1997
          2. 01-600-110-6500-0-5110-1000-4300-1892        26.73                                26.73
                        TOTAL AMOUNT                       70.33                0.00            70.33
010081    000012  Aggressive Accounting
          1. 01-800-444-7135-0-3500-0000-8590-0465        46.82                                46.82   04/21/1997
123123    000012  Aggressive Accounting     Set up for payments via trdtnl
          1. 01-000-000-0000-0-0000-0000-4310-0000        46.00   O            46.00                   06/30/1997
          2. 01-000-000-0000-0-0000-0000-4300-0000       650.00   O           150.00           500.00
                        TOTAL AMOUNT                      696.00               196.00           500.00
```

If you want to keep the print file as a Word file, save it under a different name.

Opening a File in Excel

Sending a file to Excel does not work very well because Excel is unable to split the print file line into individual data fields. Using the Excel Wizard option works better.

To send a file to Excel:

Click the ⊠ [Open in Excel] icon, press [CTRL+L], or from the menu bar, click **Options** and **Open in Excel**.

Sometimes Excel displays the following dialog box. If needed, respond to the dialog box by clicking [OK] to open the report in Excel.

```
Microsoft Excel                                                                    [X]

         This file is not in a recognizable format.

         • If you know the file is from another program which is incompatible with Microsoft Office Excel, click Cancel, then open this file in its
  ⚠      original application. If you want to open the file later in Microsoft Office Excel, save it in a format that is compatible, such as text
         format.
         • If you suspect the file is damaged, click Help for more information about solving the problem.
         • If you still want to see what text is contained in the file, click OK. Then click Finish in the Text Import Wizard.

                              [   OK   ]     [  Cancel  ]     [  Help  ]
```

A new *Microsoft Excel* window will open. The window displays a new worksheet with the contents of the selected file. Each line in the print file or spool file becomes a single cell in Excel.

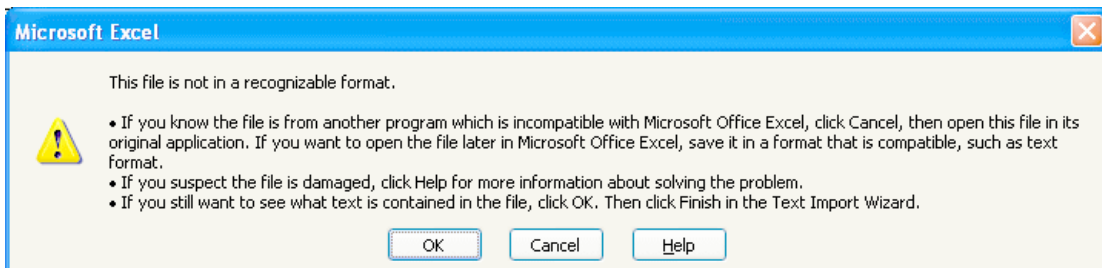|	
59	
60	07 QSS DEMONSTRATION DISTRICT OPEN PURCHASE ORDERS J7389 POR110 H.00.14 06/17/09 PAGE 1
61	TESTING VENDOR # ENTRY Vendor#:000012-000012
62	
63	Fund :01 GENERAL FUND
64	
65	NUMBER VENDOR NAME DESCRIPTION
66	Line Fd Bdr Sch Resc Y Goal Func Objt Type ENCUMBERED STAT LIQUIDATED BALANCE ENTERED
67	--
68	010064 000012 Aggressive Accounting
69	1. 01-800-500-4230-0-4760-2490-5710-0256 43.60 43.60 03/09/1997
70	
71	2. 01-600-110-6500-0-5110-1000-4300-1892 26.73 26.73
72	TOTAL AMOUNT 70.33 0.00 70.33
73	
74	010081 000012 Aggressive Accounting
75	1. 01-800-444-7135-0-3500-0000-8590-0465 46.82 46.82 04/21/1997
76	

Save the file in Excel format.

Opening a File with Excel Wizard

The Excel Wizard allows you to indicate where each data field begins and ends, however the Wizard works only for simple reports with a single detail line format that repeats for every record included in the report. When the format of every detail line is identical, you can identify the various columns.

The Wizard does not work for reports that have multiple detail lines with different formats. However, you can use the Download option to extract information from a report like this, then create a comma- or tab-delimited file for importing into Excel.

To send a file to the Excel wizard:

1   Click the [Open with Excel Wizard] icon, or press [CTRL+Z], or from the menu bar, click **Options** and **Open with Excel Wizard**

2   An *Open* dialog box displays. Press [Open] to continue to the next step.

3   Excel opens the first of three screens for the Text Import Wizard. This step allows you to define the type of file being imported to Excel.
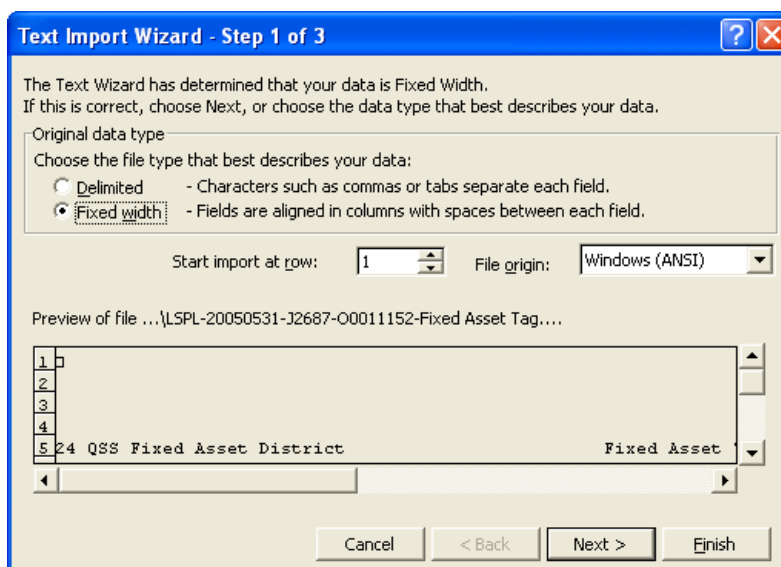
◊ For the **Original data type**, select **Fixed width**.

◊ If desired, select a row on which to begin the import. You can skip past the header rows and begin with the first row that contains actual report data.

◊ For the **File origin**, leave **Windows (ANSI)** as is.

◊ Select [Next >] to continue to the next step.

4   Define the data that goes in each column of the spreadsheet in the Text Import Wizard.
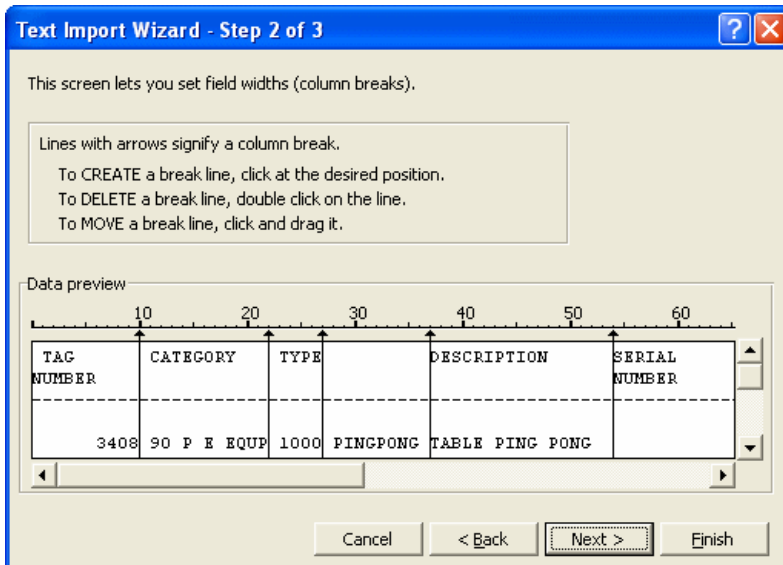
The wizard makes its best guess as to where each data item on the report begins and ends. Follow the instructions on the screen for creating, moving, or deleting column breaks. Use the horizontal and vertical scroll bars as needed to scroll through the data.

Select [Next >] to continue with importing data.

5   Define the data format for each column of the spreadsheet in the Text Import Wizard.
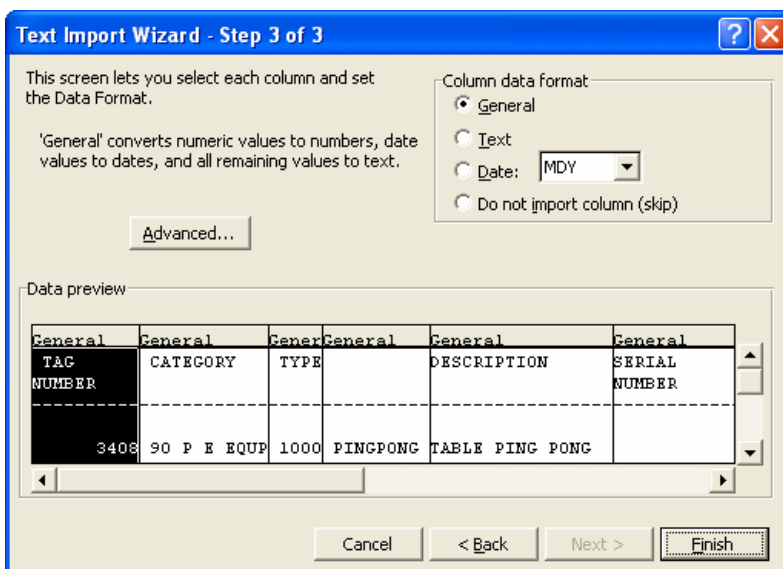
Click a column to highlight it in black, then select the format for that column in the **Column data format** area. In most cases, the default choice of **General** will work.

HINT: The **General** format removes all leading zeroes. If you want to maintain leading zeroes on accounts, site numbers, district numbers, and the like, use the **Text** format.

After you have completed defining the column format, select [Finish] to import the file into a spreadsheet.

6 A *Microsoft Excel* window opens and displays the data you have just imported.
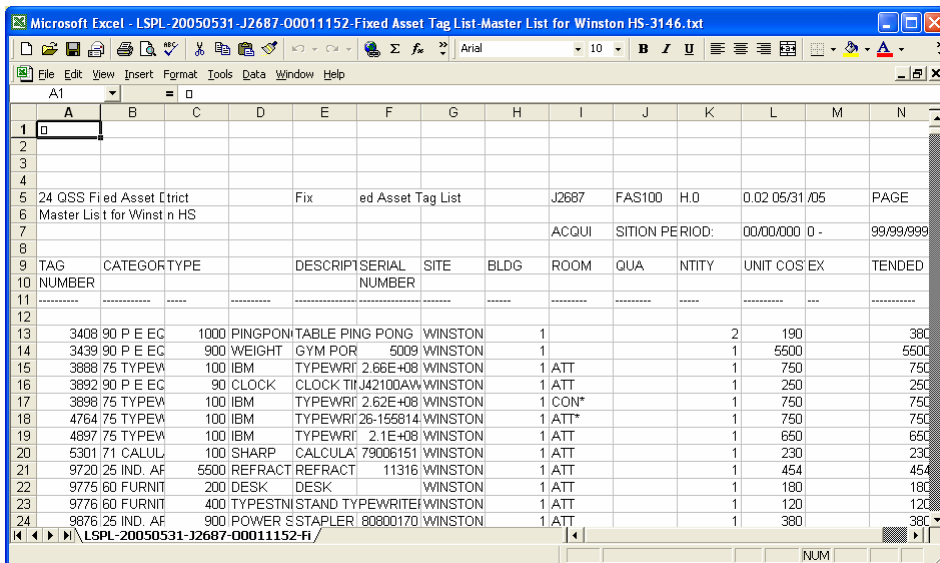
After the import, you may need to make some adjustments, such as making columns wider or narrower to fit the data. You may also want to delete the heading rows for each page.

7 If you want to keep the Excel spreadsheet, save the file in Excel format.

Grid Output Window

The *Grid Output* window displays the contents of the grid that was active when you opened the window. It allows you to save the contents of the grid as a text file, print the grid, or save it as a PDF, Word, or Excel file.

Options *Menu and Toolbar*

The **Options** menu and **Toolbar** contain the commands for printing or saving the contents of the data grid to a text file, PDF, Word, or Excel.
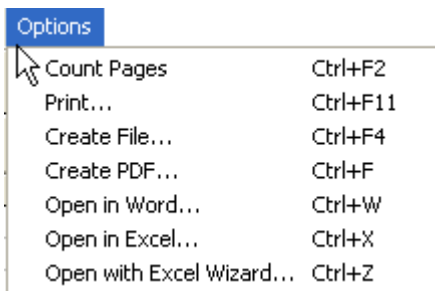
The toolbar and **Options** menu contain the same commands.

Printing to the Default Windows Printer

If desired, click the ▦ (Count Pages [Ctrl+F12]) icon to display the number of pages that will be printed. Close the dialog box to continue to the next step.
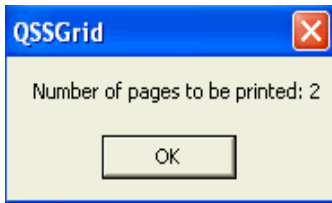
♦ Click the 🖨 (Print [Ctrl+F11]) icon.

♦ Make your selections in the *Settings* dialog box.
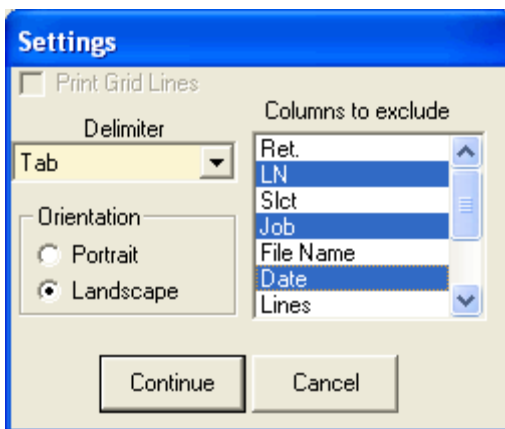
Delimiter   Not applicable for this task.

Orientation   Click **Portrait** or **Landscape** to select the page orientation when printing the grid.

Columns to remove   Highlight the columns that you want to remove when printing, the grid.

♦ After you are finished making selections, select [Continue] to print the grid on the default Windows printer for your PC.

Creating a PDF File

1 Click the (Create PDF [Ctrl+F]) icon.

2 Make your selections in the *Settings* dialog box.
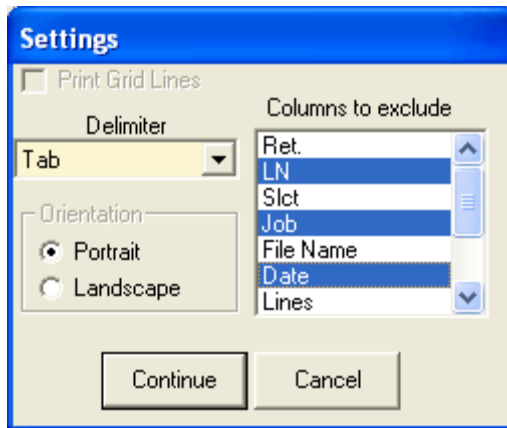
Columns to remove   Click the columns that you want to remove from the PDF file.

3 After you are finished making selections, select [Continue] to continue to the next step and create the file in the same manner as previously discussed.

Opening in Word

1 Click the ⊞ (Open in Word [Ctrl+W]) icon.

2 Make your selections in the *Settings* dialog box.
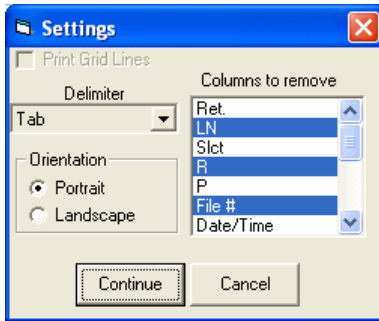
Delimiter	Select the delimiter between columns in the Word file.
Orientation	Click **Portrait** or **Landscape** to select the page orientation.
Columns to remove	Highlight the columns that you want to remove when exporting the grid.

3 After you are finished making selections, select [Continue] to continue to the next step and open a Word file in the same manner as previously discussed.

Opening in Excel

1 Click the 📊 (Open in Excel [Ctrl+W]) icon.

2 Make your selections in the *Settings* dialog box.
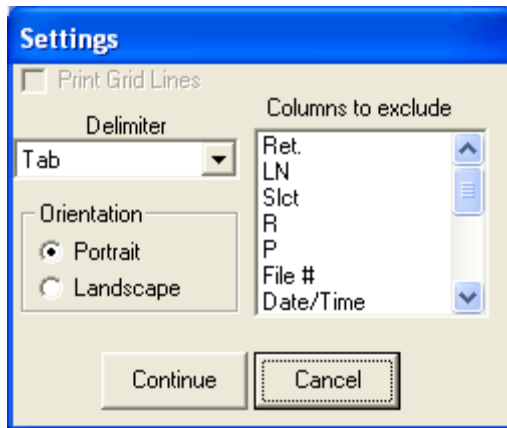
Orientation	Click **Portrait** or **Landscape** to select the page orientation.
Columns to remove	Highlight the columns that you want to remove when exporting the list.

After you are finished making selections, select [Continue] to continue to the next step and open an Excel file in the same manner as previously discussed.

Opening in Excel Wizard

1 Click the ![icon] (Open in Excel Wizard [Ctrl+Z]) icon.

2 Make your selections in the *Settings* dialog box.
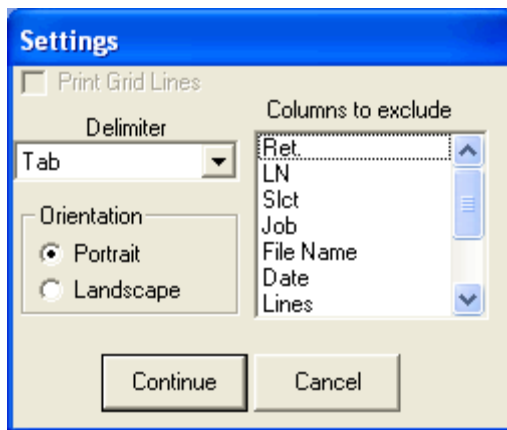
Delimiter	When opening in Excel Wizard, the *Grid Output* window always creates a tab-delimited file.
Orientation	Not applicable to this task.
Columns to remove	Highlight the columns that you want to remove when saving, printing, or exporting the list.

3 After you are finished making selections, select [Continue] to continue to the next step and open an Excel file in the same manner as previously discussed.

Downloading Files

The *Download* window allows you to select the parts of the report that contain the data you want to extract, then build a comma- or tab-delimited extract file that you can import into a spreadsheet or database program. For multi-line report formats, you can create record complexes that combine two or more lines in the report.
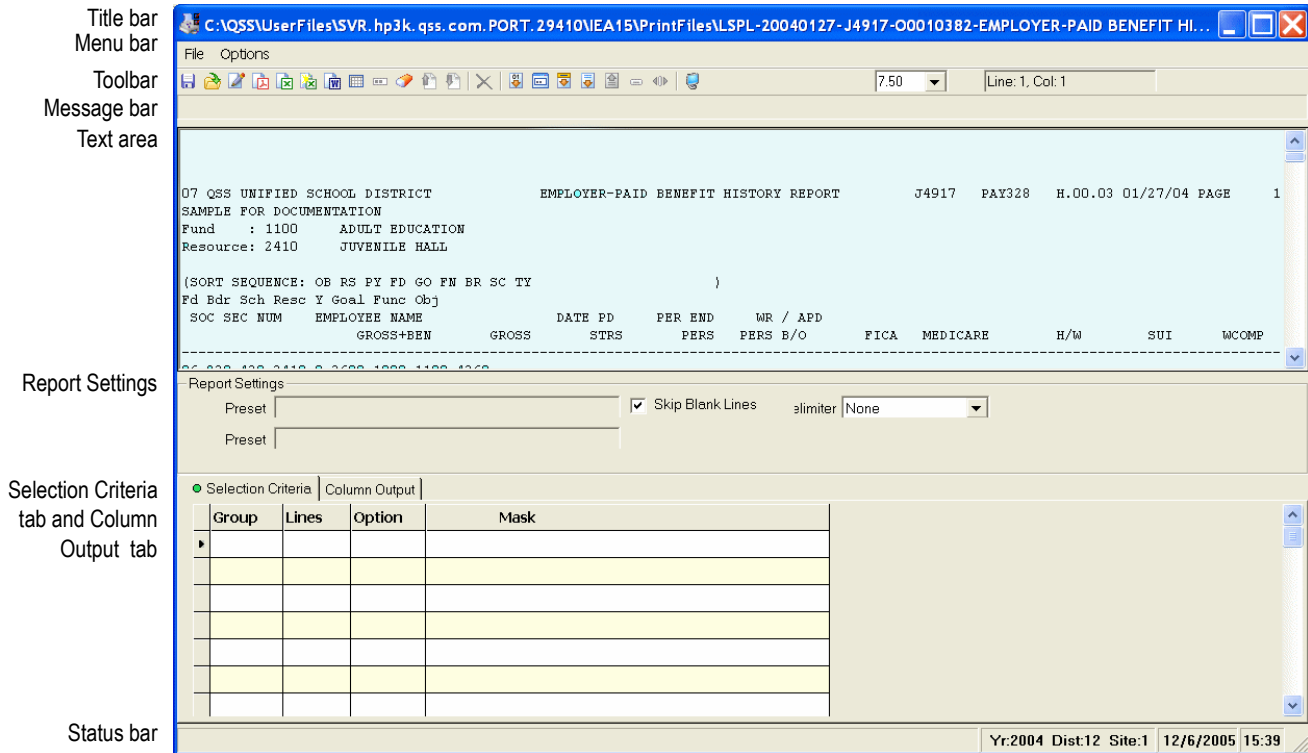
Table 2-1: New Parts of the *Download* window

PART OF WINDOW	PURPOSE
Text area	Displays the report that you selected on the *Print Manager* window or *View* window. You can select text for defining masks in the Selection Criteria tab and for defining ranges to output on the Column Output tab.
Report Settings	Retrieve presets for previous downloads, save new presets, and select options for exporting a report. You can create a library of presets to save time for reports that you download regularly.
Selection Criteria tab	Select the lines of the report that contain the data for building the extract file. You can create up to 9 groups for including the relevant lines of the report . Each group has an Include rule that defines the line to select.
Column Output tab	Select the specific data to include in the download file. Each field in the download file contains a specific bit of data from the report.

Downloading a Report from Scratch

These instructions give an overview of how to use the *Download* window to extract information from a report and create a download file. Once you have found the right settings for downloading a report, you can save them in a preset file so you don't have to reinvent the process the next time you want to download the same report.

To download a report from scratch:

1 Become familiar with the report.

The text area allows you to study the report to become familiar with the information that is on it and how it is organized. If the report has multiple detail lines, become familiar with how each group of lines is organized. If the report has a varying number of detail lines, understand the relationship among the header lines and the detail lines under them.

2 Define the selection criteria for extracting information from the report.

The Selection Criteria tab allow you to select the data lines to extract from the report. You can define groups of report lines to select. Each group has an Include rule with a mask that selects the report lines that are part of the group. A mask defines a pattern to match, such as 4 digits in columns 10 - 13, a blank space in column 14, and a letter from A through Z in column 15. You can also define SubSet or Exclude rules to fine tune the report lines selected for downloading.

3 Define the columns from the report to include in the download file.

The Column Output tab allows you to define the fields, or pieces of data, that go into each record of the download file. Each field is made from a range of columns in the report. such as getting the SSN from columns 1 - 11, the last name from columns 13 - 28, and work phone number from columns 59 - 70.

4 Save the download in a preset.

It can take a good deal of trial and error to get a download to work the way you want it to, especially for complex reports with multi-line formats. Save your work in a preset file so that you can reuse the download settings for this report.

5 Create the download file. You can export the download file directly to Word, Excel, or PDF. You can also create a text file.

To retrieve and use a preset:

1 Select a preset file in the **Report Settings** area.

2 Examine the *Download* window and decide if you need to change any of the settings in the preset file.

3 Create a text file, or export the data to Word, PDF, Excel, or Excel Wizard.

4 If appropriate, save the preset file. If you have made changes to the *Download* window, you can save your changes back to the original preset file, or you can create a new preset file.

Download File Options Menu and Toolbar Icons

Table 2-2 summarizes the commands on the **Options** menu and the **Toolbar** icons within the *Download File* option. For every command on the **Options** menu, there is an equivalent **Toolbar** icon.

As you move from one part of the *Download* window to another, menu commands and toolbar icons change from available to unavailable and from unavailable to available.

Table 2-2: Options Menu and Toolbar Icons

OPTIONS MENU COMMAND	ICON	KEYBOARD SHORTCUTS	PURPOSE
Save <u>P</u>reset...		F9	Save the report processing rules in the *Download* window as a preset that you can reuse later.
<u>G</u>et Preset...		CTRL+T	Get a preset that you have previously saved.
Send to <u>Q</u>uick Report...		CTRL+Q	Open a window that previews what the download data looks like. .
Create <u>P</u>DF...		CTRL+F	Download data from the report and save it in a PDF file.
Open in Excel...		CTRL+X	Open a Microsoft Excel spreadsheet that contains data extracted from the report.
Open with Excel <u>W</u>izard...		CTRL+Z	Use the Text Import Wizard to import the download file into Excel.
Open in <u>W</u>ord...		CTRL+W	Open a Microsoft Word document with data from the report.

Table 2-2: Options Menu and Toolbar Icons

OPTIONS MENU COMMAND	ICON	KEYBOARD SHORTCUTS	PURPOSE
Grid Output		SHIFT+F11	Open a *Grid Output* window that displays the contents of the tab with the green dot in its label.
Edit Mask		CTRL+M	From the Selection Criteria tab, open a *Mask definition form for group* dialog box that allows you to define a mask for including, excluding, or defining a subset of report lines.
Clear Form		SHIFT+F1	Clear all of the rows in the active tab (the one that has a green dot in its label).
Move Column Row Up		CTRL+U	In the Column Output tab, move the current row up one row.
Move Column Row Down		CTRL+D	In the Column Output tab, move the current row down one row.
Remove Row		CTRL+W	Remove a row from the Column Output tab.
Create Raw Mask No Group		CTRL+F6	For the Selection Criteria tab, create a raw mask (the actual text selected) without assigning it to a group.
Create General Mask No Group		CTRL+F7	For the Selection Criteria tab, create a general mask (wildcards for the selected text) without assigning it to a group.
Create Group Raw Mask		CTRL+F1	For the Selection Criteria tab, create a raw mask (the actual text selected) in a new group.
Create Group General Mask		CTRL+F2	For the Selection Criteria tab, create a general mask (wildcards for the selected text) in a new group.
Add Raw Mask to Group		CTRL+F3	For the Selection Criteria tab, add the selected text in the report to the current group as a raw mask (the actual text selected).
Add General Mask to Group		CTRL+F8	For the Selection Criteria tab, add the selected text in the report to the current group as a general mask (wildcards for the selected text).
Select Column Range		CTRL+F5	For the Column Output tab, add the selected range of columns to the current row in the tab.

Table 2-2: Options Menu and Toolbar Icons

OPTIONS MENU COMMAND	ICON	KEYBOARD SHORTCUTS	PURPOSE
Print <u>S</u>creen		F11	Print a graphic image of the *Download* window on the default Windows printer for your PC.

Text Area
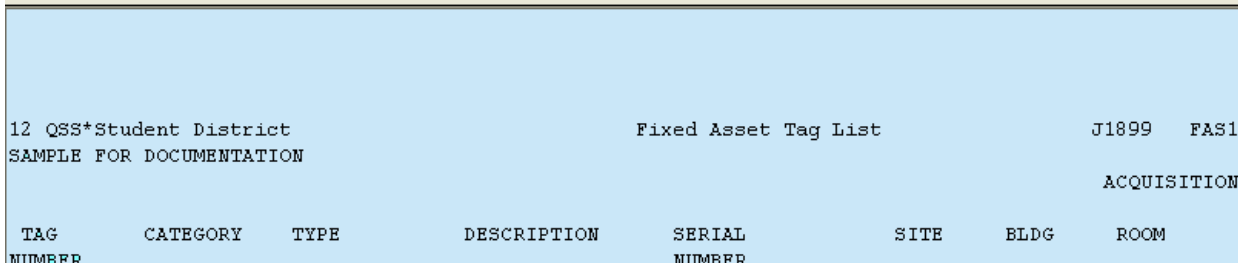
The text area allows you to browse the report selected from the *Print Manager* window or *View* window. You can use this area to get a sense of the design of the report and what you want to get out of it.

The text area is used to select the text for creating a mask on the Selection Criteria tab or for defining a column range on the Column Output tab.

Selecting a Range of Text

1 Highlight the text that you want to select. Note that the line and column location of your selected text is displayed in the Status Bar above the Text Area.

2. Select the text to use for building a mask or column output range. You can select the text with the mouse or the keyboard.

NOTE: All column ranges must be on the same line of text. The screen will not allow a selection to span two or more lines.
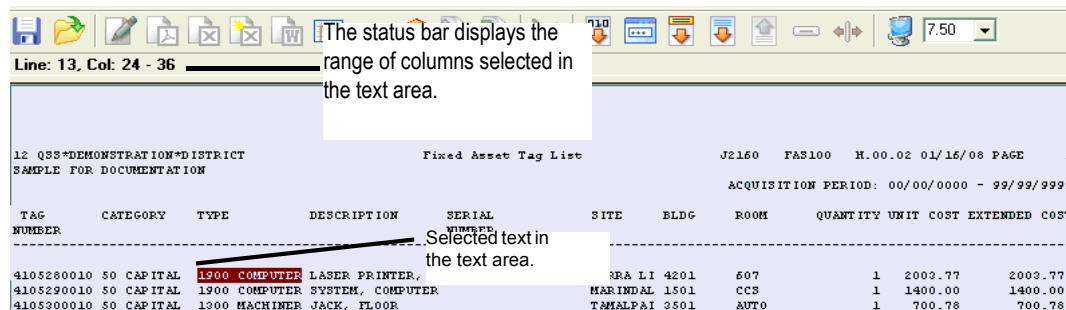
Report Settings

The **Skip Blank Lines** check box allows you to select whether to process blank lines. Normally, you should check this option, as the blank lines contain no information.

The **Delimiter** list allows you to select the delimiter, or separator, between fields for exporting to PDF, Word, or a text file. The commands for Excel (**Open in Excel..**. and **Open with Excel Wizard...)** always open with a tab-delimited file.

Table 2-3: File formats for downloading to Word, PDF, or a text file

CODE	EXTRACT FILE FORMATTING
N	**None.** There are no separators between the individual fields in the download file. Each field is identified by the column ranges.
C	**Comma-delimited.** Each field is separated by a comma. This is a standard import format used by many PC databases and spreadsheets.
B	**Blank.** The download file inserts a space between fields.
T	**Tab delimited.** Each field is separated by a tab character. This is a standard import format used by many PC databases and spreadsheets.

Selection Criteria Tab

The Selection Criteria tab becomes active after you click its label. The green dot indicates that it is the active tab. Each row in the Selection Criteria grid allows you to define the rules for selecting the parts of the report that contain the data to be included in the download file. You can define up to 24 rules for each download.

Columns on the Tab

These instructions tell how to fill in the columns on the Selection Criteria tab.

| **Group** | The group with which a rule is associated. The options are a blank group or groups assigned to the letters A - J. |
| **Lines** | The number of report lines in each group, which is 1 - 10. |

Option	The **Option** defines the type of rule.

♦ An <u>Include</u> rule defines the report lines included in each group. Every group has one, and only one, <u>Include</u> rule.

♦ One or more <u>SubSet</u> rules are optional for groups A - J. They act as filters on the report lines selected by the group's <u>Include</u> rule.

♦ <u>Exclude</u> rules are optional.

     ◊ If you are using the blank group, <u>Exclude</u> rules are filters for selecting report lines to exclude from the download file.

     ◊ If you are using groups A - J, you can create global and group <u>Exclude</u> rules. <u>Global Exclude</u> rules exclude report lines from all groups. <u>Group Exclude</u> rules exclude report lines from specific groups.

Mask	A pattern for identifying the lines selected by a rule. A mask uses special characters to match patterns in report lines.

MASK	MATCH IN REPORT LINE
blank	Not used for matching. Any character in the report line matches a blank in the mask.
#	A digit from 0 through 9.
@	Any characters that is not a space (digits 0 - 9, letters, punctuation, and special characters)
~	A blank column on the report.
any other character	Exact match. The match is case sensitive.

Blank Group

Groups are optional on the Selection Criteria tab. If you leave the **Group** column blank, the selection criteria are limited to one group that contains a single line.

1 The first line in the Selection Criteria tab must have the following:

- ◊ A blank **Group**
- ◊ A **Line** depth of 1
- ◊ An **Option** of Include
- ◊ A **Mask** that includes at least 1 character other than a blank space

2 The blank group cannot include any of the following:

- ◊ Additional Include rules.
- ◊ SubSet rules.

3 You can define optional Exclude rules to filter the lines that are selected by the Include rule.

Groups A - J

Groups A - J can include multiple lines in a group.

1 If desired, exclude report lines from all groups with optional Global Exclude rules.

2 Create one or more groups. Group A is required. Groups B - J are optional.

3 Create one Include rule for each group in the Selection Criteria tab.

The Include rule has the following:

- ◊ A **Group** letter from A - J
- ◊ A **Line** depth from 1 - 9
- ◊ An **Option** of Include
- ◊ A **Mask** that contains at least one non-blank character

4 Create optional SubSet or Exclude rules for a group. You can create up to a total of 24 SubSet or Exclude rules. If you define both Exclude and SubSet rules, the system applies the Exclude rules first. Each rule has the following:

- ◊ A **Group** letter for which you have created an **Include** rule.
- ◊ The **Lines** number of 1.
- ◊ An **Option** of SubSet or Exclude.
- ◊ A **Mask** that contains at least one non-blank character.

Global Exclude Rules

Global Exclude rules allows you to exclude lines from all groups. If a report line matches any Global Exclude rule, it is excluded from *all* groups.

- Leave the **Group** blank.
- Make the **Lines** 1.
- Select the **Exclude** option.
- Define a **Mask** with at least one non-blank character.

Order for Processing Rules

The order for processing rules is different for the blank group and groups A - J.

Blank Group

- The system selects all report lines that match the Include rule.
- The Exclude rules act as filters.

Groups A - J

1 The system applies Global Exclude rules first. .

2 The system applies the selection rules for each group.

- The Include rule selects all report lines that match its mask.
- The optional Exclude rules remove all report lines that match any one of the Exclude rules.
- If there are SubSet rules, the only report lines that remain in the group are those that match any one of the SubSet rules.

3 If you have defined multiple groups, the system builds a record complex.

- A report line that matches group A.
- Within group A, all report lines that match group B.
- Under each pair of group A / group B lines, group C includes report lines that match the selection rules for group C.

Creating Groups and Masks

The *Download* window allows you to create groups and masks in the Selection Criteria tab by selecting text from the text area. The following commands are used for this process.

Table 2-4: Commands on the <u>O</u>ptions Menu for the *Download* window

MENU COMMAND	ICON	KEYBOARD SHORTCUT	PURPOSE
Options | Create Raw Mask <u>N</u>o Group		CTRL+F6	Create a new row with a raw mask (the actual text selected) without assigning it to a group.
Options | Create General Mask <u>N</u>o Group		CTRL+F7	Create a new row with a general mask (wildcards for the selected text) without assigning it to a group.
Options | Create Group <u>R</u>aw Mask		CTRL+F1	Create a new row with a raw mask (the actual text selected) in a new group.
Options | Create Group <u>G</u>eneral Mask		CTRL+F2	Create a new row with a general mask (wildcards for the selected text) in a new group.
Options | Add Raw Mask to Group		CTRL+F3	For an existing group, add the selected text in the report to the current mask as a raw mask (the actual text selected).
Options | Add General Mask to Group		CTRL+F8	For an existing group, add the selected text in the report to the current mask as a general mask (wildcards for the selected text).

General Steps for Creating a Mask and/or a Group

1 Select text in the text area.

2 Click the appropriate icon from the table above.

3 A new row will be added to the Selection Criteria tab.

4 Edit the row as needed.

Raw Masks

A Raw Mask is created by selecting from the report displayed in the text area the actual words, numbers, or symbols that you want included in your download. Raw Masks can be assigned to either no group or to an A - J group.

If we wanted to select the following highlighted text to be included in our mask....

```
TAG         CATEGORY    TYPE         DESCRIPTION      SERIAL        SITE      BLDG    ROOM     QUANTITY UNIT COST EX
NUMBER                                                NUMBER
-----------------------------------------------------------------------------------------------------------------

4105280010 50 CAPITAL   1900 COMPUTER LASER PRINTER, C USCB005782   COTTON    4201    607          1     2003.77
4105290010 50 CAPITAL   1900 COMPUTER SYSTEM, COMPUTER              SAN CARL  1501    CCS          1     1400.00
```

A sample Raw Mask with no Group would look as follows:

Selection Criteria	Column Output		
Group	**Lines**	**Option**	**Mask**
	1	Include	1900 COMPUTER

General Masks

A General Mask is created by using wildcards to define various fields of data which are of a certain length and located in a certain position on the face of the report. The wildcards which are used to do this are as follows:

MASK	MATCH IN REPORT LINE
blank	Not used for matching. Any character in the report line matches a blank in the mask.
#	A digit from 0 through 9.
@	Any characters that is not a space (digits 0 - 9, letters, punctuation, and special characters)
~	A blank column on the report.
any other character	Exact match. The match is case sensitive.

A sample General Mask for the same data field would appear as follows:

Selection Criteria	Column Output		
Group	**Lines**	**Option**	**Mask**
▶	1	Include	####~@@@@@@@@

In this case, the mask is ####-@@@@@@@@. This mask selects any line that matches the pattern of 4 digits in columns 24-27 (####), a space in column 28 (~), and a string of non-blank characters in columns 29 - 36 (@@@@@@@@).

A - J Group

If we wanted to include either of the two above sample masks in an A Group, we would add the letter 'A' to the first column on the Selection Criteria rab.

Group	Lines	Option	Mask
▶ A	1	Include	1900 COMPUTER

(Selection Criteria | Column Output)

Group	Lines	Option	Mask
▶ A	1	Include	####~@@@@@@@@

(Selection Criteria | Column Output)

Editing the Mask

The *Mask definition form for group* dialog box allows you to edit masks for selecting report lines. It displays after you click the **Mask** column in the Selection Criteria tab.
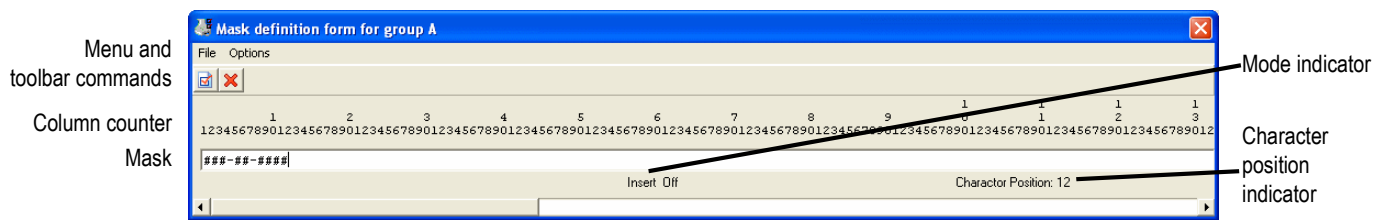
• The column counter identifies the column in the report line for each special character in the mask.

• The mask uses the same special characters for defining a pattern as discussed earlier.

Editing the Mask

1 Place the cursor where you want to begin typing or editing by clicking a position in the mask or by using the LEFT or RIGHT ARROW keys to move to the desired location.

   The **Character Position** indicator displays the column number for the cursor.

2 If needed, select Insert or Typeover mode by pressing the INSERT key on your keyboard to toggle between **Insert On** and **Typeover** mode.

3 Add, change, or delete characters from the mask as needed.

Displaying the Selected Report Lines

The [Send to Quick Report...] command allows you to display the list of report lines selected by the rules on the *Selection Criteria* tab. You can use this command to see if the *Selection Criteria* rules are working as expected. .

NOTE: If the *Column Output* tab is filled in, the *Quick Report* window displays the data selected for the download file.

To display report lines selected on the Selection Criteria tab:

1 Fill in the *Selection Criteria* tab with a minimum of one Include rule. You can also define optional Subset and Exclude rules.

2 From the *Download* window, open a *Quick Report* window.

3 Review the report lines selected.

The *Quick Report* window displays the report lines that match the rules on the *Selection Criteria* tab. You can use the scroll bars and standard Windows keys to navigate through this window.

4 If you want to refine the selections criteria, return to the *Selection Criteria* tab, modify the rules, and repeat Step 2 and Step 3.

5 If desired, save the contents of the *Quick Report* window in a text file.

6 After you are satisfied with the rules on the *Selection Criteria* tab, close the *Quick Report* window.

Column Output Tab

The Column Output tab allows you to define the specific fields in the download file. You can use the following to select the part of the report to use for building each field:

• The group and line number for selecting the report line, as defined on the *Selection Criteria tab*.
• The beginning and ending column in the report.
• An optional edit rule, such as stripping the hyphens between the parts of the SSN or removing all parentheses and hyphens from phone numbers.

Filling In the Tab

There are a couple of ways to define the fields in the download file:

• Type the information directly in the *Column Output tab*.
• Add rows to the *Column Output tab* by selecting text in the text area.

Group Link	Line	Begin Col	End Col	Option
A	1	1	10	
A	1	12	13	
A	1	15	22	
A	1	24	27	
A	1	29	36	

Group Link   The group that is the source for the data in the column.

Line   The line number in the group from which to extract the data.

Begin Col   The range of column numbers from which to extract the data.
End Col

Option   Leave blank to make no edits to the report data when creating the download file.

        • Select **Move Trailing Minus** to edit negative numbers with a trailing minus sign.
        • Select **Move Trailing Minus - Left Justify** to edit negative numbers with a trailing minus sign.
        • Select **Upshift** to make all letters from A - Z upper case.
        • Select **Downshift** to make all letters from A through Z lower case.
        • Select **Remove Special Characters** to remove all characters other than the letters A - Z and the numerals 0 - 9.

- Select **Remove all non-numbers** to remove all characters other than the numerals 0 - 9 and the decimal point.
- Select **Change Year to YY/MM/DD** to change the date to year, month, day order with a 2-digit year.
- Select **Change Year to YYYY/MM/DD** to change the date to year, month, day order with a 4-digit year..

Defining Columns from the Text Area

These instructions tell how to use text area to select a range of columns for defining a field in the download file on the *Column Output tab*.

1 Select text in the text area by highlighting it.

2 Click the ◀▶ [Select Column Range] icon, or press [CTRL+F5].

Fill in the dialog box which displays to assign the selected column range to a group and line number defined on the *Selection Criteria tab*.
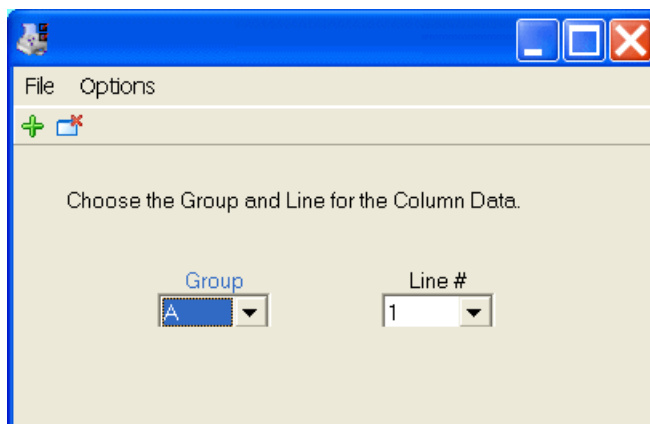
◊ From the **Group** list, select the group from which to select the data.

◊ From the **Line #** list, select the line number in the group from which to extract the data.

Previewing and Saving the Download File

You can use the [Send to Quick Report...] command to preview the contents of the download file. .

NOTE: If the *Column Output* tab is blank, the *Quick Report* window displays the report lines selected by the rules on the *Selection Criteria tab*.

### *To display report lines selected on the Column Output tab:*
1 Fill in the Column Output tab.

| Group Link	Line	Begin Col	End Col	Option
A	1	1	10	
A	1	12	13	
A	1	15	22	
A	1	24	27	
A	1	29	36	

2 From the *Download* window, open a *Quick Report* window.

3 Review the download file produced by the column definitions in the *Column Output tab*.

The *Quick Report* window displays the download file. The format looks different depending on the choice of **Delimiter**.
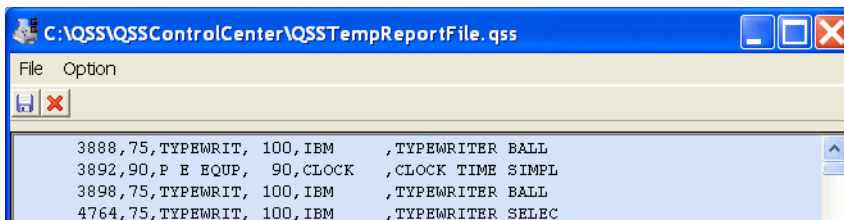
When there is no delimiter, the download file makes all selected fields into one continuous string.
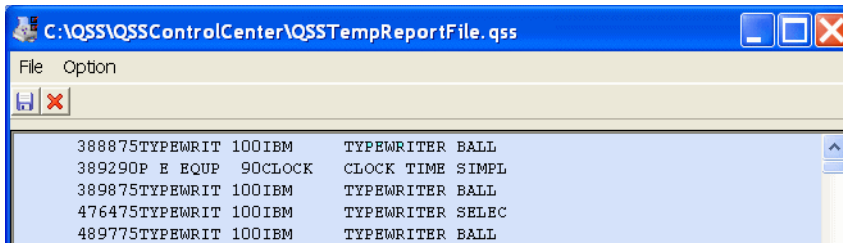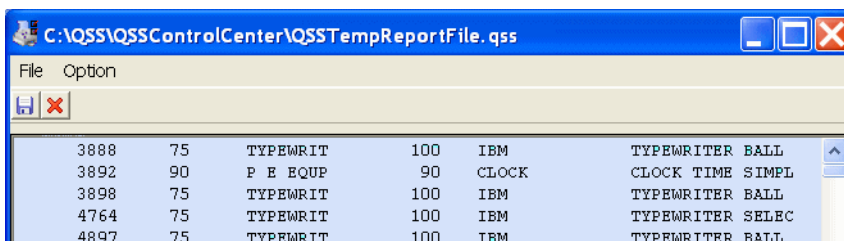

For a space-delimited file, there is a space between each field. However, each field can have embedded spaces as well.
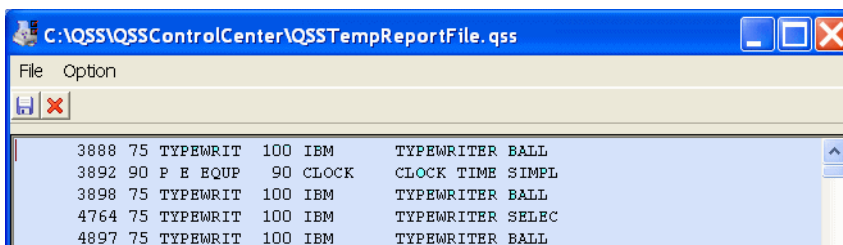
For a comma-delimited file, there is a comma separating each field in the download file.

For a tab-delimited file, the separator between each field is a tab.

4 If you want to refine the column definitions, return to the *Column Output tab*, modify the rules, and repeat Step 2 and Step 3.

5 If desired, save the contents of the *Quick Report* window in a text file for importing into a spreadsheet or database. You can also export the download file to Word, PDF, Excel, or Excel Wizard directly from the *Download* window.

6 After you are satisfied with the rules on the Column Output tab, close the *Quick Report* window.

Presets

A preset is a file that saves the options you used for filling in the Download window. Once you have figured out how to structure a download of a report, you can save the download options in a preset file for future use.

Saving a Preset

After you select the **Save Preset** command, the *Preset Maintenance - Save* dialog box allows you to save a preset. The top of the dialog box allows you to give a name to the preset you are saving, and the grid in the bottom of the dialog box lists the presets that are already defined.

Commands for saving presets

Grid of presets that have already been saved. Double-click any column heading to sort in ascending order. Double-click again to sort in descending order.

Boxes for naming and categorizing the preset
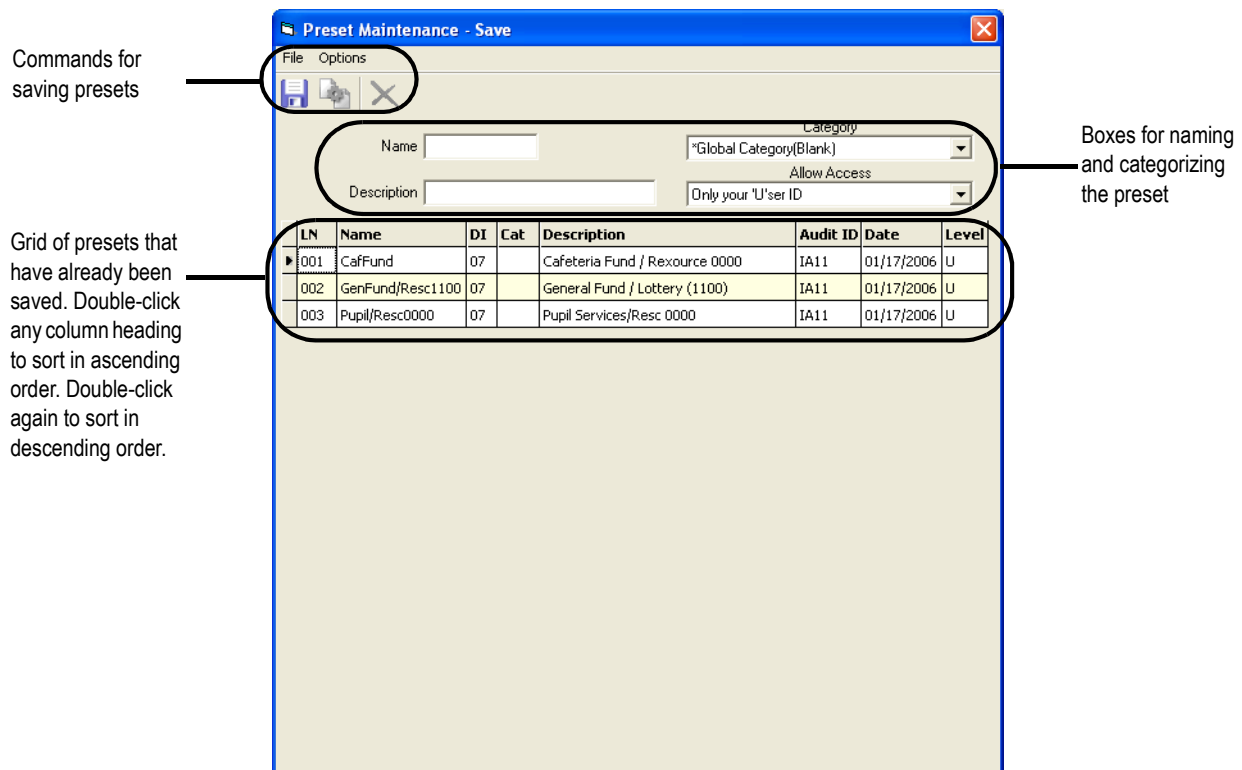
To save a new preset:

1 Define the download definition that you want to save. Then select **Save Preset** from the **Options** menu, or click the 🖫 [Save Preset] icon. or the [F9] hotkey.

2 In the *Preset Maintenance - Save* dialog box, type a **Name** up to 16 characters long. Every preset must have a name.

3 If desired, type a **Description** up to 30 characters long and select the **Category** and **Allow Access** options.

4 Save the preset by clicking **Save** from the **Options** menu, by clicking the 🖫 [Save] icon, or by using the [F9] hotkey .

WARNING: If the preset you are saving has the same **Name** as an existing preset, the **Save** command replaces the existing preset without any warning.
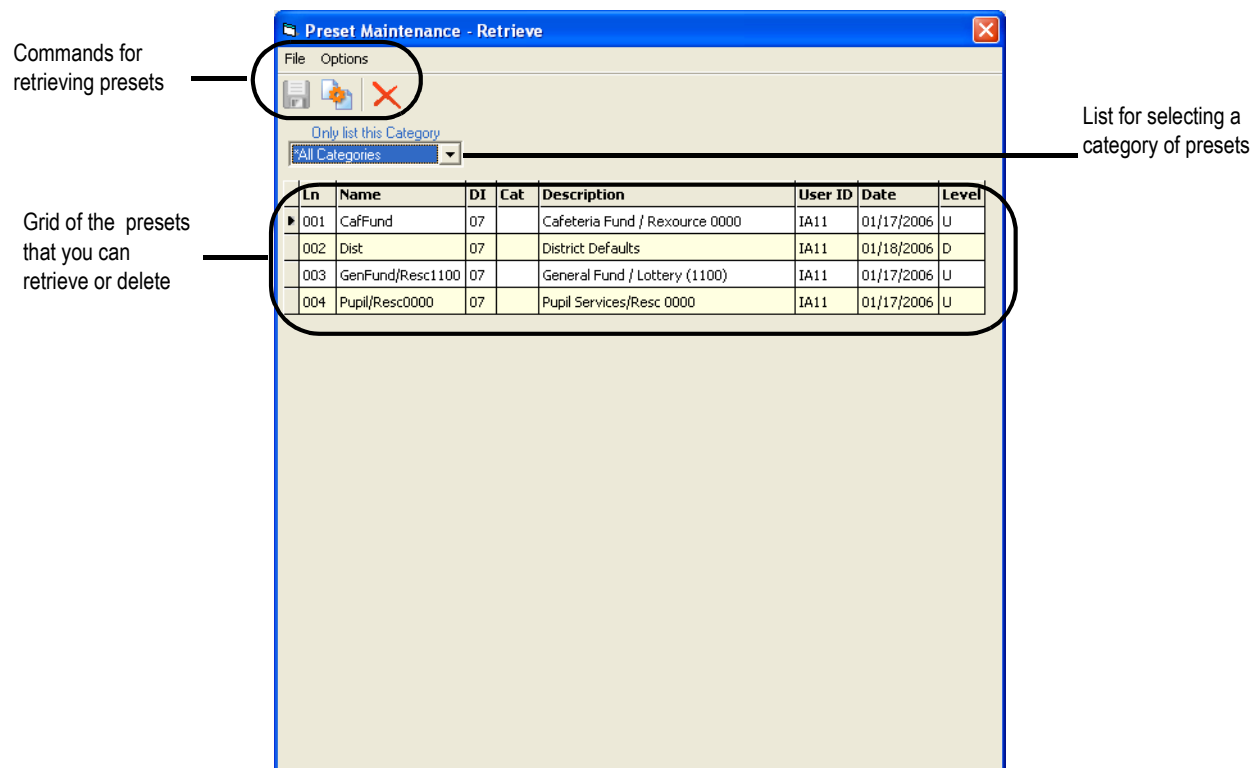

To replace a preset:

1 Define a a download definition that you want to save.

2 Locate the preset that you want to replace on the grid.

3 Double-click the preset. Its **Name**, **Description**, **Category**, and **Allow Access** option display on the top of the dialog box.

4 Leave the **Name** unchanged. You can change the **Description**, **Category**, and **Allow Access** options. Replace the existing preset with the revised preset by selecting **Save** from the **Options** menu, by clicking the 🖫 [Save] icon, or by using the [F9] hotkey.

To create a new preset from an existing one:

1 Define a download definition that you want to save.

2 On the grid, locate the preset that is the basis for creating a new one.

3 Double-click a preset in the grid. Its **Name**, **Description**, **Category**, and **Allow Access** option display on the top of the dialog box.

4 On the top of the screen, type a new **Name**. You can also change the **Description**, **Category**, and **Allow Access** options.

5 Save the new preset by selecting **Save** from the **Options** menu, by clicking the 🖫 [Save] icon, or by using the [F9] hotkey.

Retrieving or Deleting Report Presets

After you select the **Get Preset** command or icon, a *Preset Maintenance - Retrieve* dialog box displays. It lists all of the presets that have been saved for downloads. .

Commands for retrieving presets

List for selecting a category of presets

Grid of the presets that you can retrieve or delete

To select a report preset for retrieving or deleting:

1 By default, the dialog box displays presets for all categories. You can select an individual category from the **Only list this Category** box.

2 You can sort the list by any column. Double-click to sort in ascending order (A to Z). Double-click a second time to sort in descending order (Z to A).

3 Click a preset or use the UP ARROW or DOWN ARROW to select it. To retrieve the selected preset, click the [Retrieve] icon, press [F2], or double-click it.

4 To delete the selected preset, click [Delete] on the Options menu, click the ✕ [Delete] icon, or press CTRL+F8.