Tax .NET: Report Designer

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BS&A Software Courseware

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Introduction

Introduction

About This Course

This course is designed to offer a hands-on experience with the Report Designer that is included with all BS&A applications. It is not an exhaustive demonstration of the software. This course manual is intended to be a companion to the Tax software manual, the electronic version of which may be used during class time.

This book is yours to keep. Space has intentionally been made available throughout for you to record your own notes.

Contact Us

Help Menu	
Either option puts your request directly into our contact management database. Help requests submitted in either of these manners get the same first-come, first- served attention as a traditional phone call.	Option 1: Go to Help>Contact Customer Support>Request Support Phone Call Option 2: Go to Help>Contact Customer Support>Email Support
Phone	Toll free at (855) 272-7638
Email	taxsupport@bsasoftware.com
I.T. SUPPORT EMAIL	itsupport@bsasoftware.com
Web	http://www.bsasoftware.com/Contact
Fax	(517) 641-8960

The Basics

The Basics

Getting Started

It is important to select the proper report Category on which to base your user report. For example, if your report will be comprised primarily of special assessment data, be sure to select Special Assessment Reports from the Reports menu.

Tax System User: BSA DB: De	emonstration Group: Parker Version: 09/01/2019			- 🗆 X
File View Navigation Tasks	Reports Utilities BS&A Applications Help			
1.1177.48	Parcel Reports Balancing/Settlement Reports		1.00	
	Payment/Distribution Reports Rolls			
	Bills Receipts (Based on the Parcels Table)			
	Tax Journal Custom Reports For Various Jurisdictions			
1.1	Various Reports for County System Users Audit Reports	-		
	Other Reports Clear Report Favorites			
	Report Profiles			
	-			

If you happen to have selected a different Category from the Reports menu, you may switch categories in the Run Reports screen.

Run Reports		×
Add Report	👌 Delete Report 🛛 📝 Edit 🛛 💇 Rename	😡 Audit 🛛 🎉 Tools 👻
Report		
Category:	Parcel Reports 💌	
Name:	Parcel Reports Balancing/Settlement Reports Payment/Distribution Reports	Report Options
Report Po	Rolls Bills	
Population:	Receipts (Based on the Parcels Table) Special Assessment Reports	Pop. Options
Spec. Pop.:	Tax Journal Custom Reports For Various Jurisdictions Various Reports for County System Users Audit Reports Other Reports	
Sort Index:	Parcel #	
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Number of C	Copies: 1	Margins/Fonts
Current P	Printer: //ramona/SAVIN131	Printer Settings
Show San	nple Reports Run Report	Close

Most report Categories give you the option of either basing your report on a system report, or adding a blank report. The System Report option includes fields that may be added to, removed, or otherwise manipulated; the Blank option does not - you have a clean slate from which to begin. This course will take you through adding a blank report.

Add New Report	×
Add Based On Report Template Available Template Reports:	
ACH Report Deferment Application (Current Season) Legal Desc. Synopsis Mailing Labels Customized (Template) Mortgage Code/Parcel # with Barcode Report Template Add Blank Report Include Page Header Include Report	Footer
Master Report Table: ParcelMaster Available Child Tables Table Name HistoryHeader ParcelAdjustments ParcelSpecials ParcelTaxBills ReceiptHeaders	Child Tables To Include On Report Table Name All None
	OK Cancel

Run Reports	\times
🕤 Add Report 🕒 Delete Report 📝 Edit 📝 Rename 😡 Audit 🎉 Tools	•
Report	
Category: Audit Reports	
Name: Audit File Summary Report Options	
Rer Add New Report	
Pop Spe Please select the report on which you would like to base the new report	
Sor OK Cancel	
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Number of Copies: 1 Margins/Fonts.	•
Current Printer: \\ramona\SAVIN131 Printer Settings.	
Show Sample Reports Run Report Close	

The "Audit Reports" Category only allows you to base your report on a system report.

The "Tax Journal" and "Custom Reports for Various Jurisdictions" Categories do not allow user report creation.

Add the Report

1. Select the Parcel Reports Category and click the Add Report button.

Run Reports	×
🔂 Add Report 👌 Delete Report 🛛 📝 Edit 🛛 💇 Rename 🛛 📖 Audi	t [🌇 Tools 👻
Report	
Category: Parcel Reports	
Name: Sample Parcel Report Report	t Options
Report Population	
Population: All Records Pop. 0	ptions
Spec. Pop.: Ad Valorem+Special Acts	
Apply Advanced Query to Population	
Advanced Query	
Sort Index: Parcel #	
Destination: Screen	
Number of Copies: 1	rgins/Fonts
Current Printer: \\ramona\SAVIN131 Printer:	nter Settings
Run Report	Close

2. Select Add Blank Report.

Add New Report	×
O Add Based On Report Template	
Available Template Reports:	
ACH Report	^
Deferment Application (Current Season)	
Legal Desc. Synopsis	
Mailing Labels Customized (Template)	
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	-
	Footer
Master Report Table: ParcelMaster	<u>•</u>
Available Child Tables	Child Tables To Include On Report
Table Name	>> Table Name
HistoryHeader	
ParcelAdjustments	
ParcelSpecials	All
Parcell axbills	
Receiptneaders	None
	OK Cancel

Include Page Header defaults to on; Include Report Footer defaults to off; Master Report Table defaults to ParcelMaster (in this example). We will accept these defaults. Adding a footer will be covered separately. Utilizing Child Tables will be a class discussion, time permitting. Tax. NET: Report Designer

3. Click OK, then click Yes when prompted to continue. You are prompted to enter a name.



4. Click Ok. The Report Designer opens.

Report Designer - My Class Report (MODIFIED)*	_		Х
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Page_Header [one section per page]			
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<			>
Currently Selected Field: <section> ParcelMaster_Section</section>			:

Edit the Report

Designing a report can be an elaborate undertaking. You may need to exit the designer from time to time. You can easily return to edit mode by clicking the Edit button in the Run Reports dialog.

Run Reports >
🕤 Add Report 👌 Delete Report 🛛 📝 Edit 🛛 🕸 Rename 🛛 😡 Audit 🛛 🎉 Tools 👻
Report
Category: Parcel Reports
Name: My Class Report Report Options
Report Population
Population: All Records Pop. Options
Spec. Pop.: Ad Valorem+Special Acts
Apply Advanced Query to Population
Advanced Query
Sort Index: Parcel #
Destination: Screen
Number of Copies: 1 Margins/Fonts
Current Printer: \\ramona\SAVIN131 Printer Settings
Show Sample Reports Run Report Close

Report Designer Layout

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S Currently Selected Fields - «Section», defaultDascelDenest1			>
Currentity Selected Field: <section> defaultParceixeport1</section>			.::

1 - Title Bar

The Title Bar includes the name of your user report.

2 - Menu Bar

File, Edit, Format, and View contain numerous options to aid in report design.

3 - Tool Bar

In addition to typical formatting buttons, the following tool buttons are available:

Show/Hide Toolbox, Field List, and Property Grid: This button acts as a toggle to show or hide a pane that provides tools, fields, and property settings. This will be covered in detail later.

Manage Dialog Fields: A dialog field prompts users for input. Dialog fields will be covered in detail later.

Zoom In; Zoom Out: These buttons are used to zoom in and out of the design field.

4 - Sections

Available sections and their titles vary by report Category. Sections can be quite complex; the following is a rough sketch of their use in report design. Each section has a specific location in the report body.

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📰 Show Toolbox, Field List and Property Grid	🔍 N	lanage Dialog Fields	🢐 Z	oom In	💐 Zoom Out				
	• •	. 3 4			5 6		7	1	
Page_Header [one section per page]	×	Paste Delete Insert Section Insert Detail Report Zoom Properties	>		Top Margin Report Header Page Header Group Header Detail Group Footer Report Footer Page Footer Bottom Margin				
<									>
Currently Selected Field: <section> Page_Heade</section>	r								

Top Margin: Fields placed here appear in the top margin of every page generated.

Report Header: Fields placed here appear at the beginning of the report.

Page Header: Fields placed here appear at the top of every page generated.

Group Header: This is used in reports for which separate totals are wanted. Fields placed here appear once at the top of the data group.

Detail: Fields placed in this section appear once for each record found.

Group Footer: This is used in reports for which separate totals are wanted. Fields placed here appear once at the bottom of the data group.

Report Footer: Fields placed here appear at the end of the report.

Page Footer: Fields placed here appear at the bottom of every page generated.

Bottom Margin: Field placed here appear in the bottom margin of every page generated.

Toolbox; Field List; Property Grid

When the Report Designer opens, this pane is hidden; the button uses the term, "Show."

File Edit Format View Save Save Cut Copy Paste Save 9 B B Italic Underline Show Toolbox, Field List and Property Grid Manage Dialog Fields Save Zoom In Zoom Out	₹
Save Save Cut Copy Paste Image Courier New 9 Image B B Italic U Underline Image Show Toolbox, Field List and Property Grid Show Tool	
Show Toolbox, Field List and Property Grid Manage Dialog Fields 🛛 📽 Zoom In 🗞 Zoom Out	
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Page_Header [one section per page]	
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S Currently Selected Fields - (Section): Dage Header	2

It is recommended that you click this button upon accessing the report designer. The button will change to "Hide."

Report Designer - My Class Report	_		×
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Field List Toolbox Property Grid [®]	1 + + + 4 +		· · 5
Search:			
Breaction Breaction			
Selected Field Information:			
<pre></pre>			>
Currently Selected Field: <section> Page_Header</section>			

Tax. NET: Report Designer

Field List

This tab contains the fields that you can place in the different report sections. It is divided into three groups of fields: **Report Fields** are fields drawn from the program, subject to the type of report you are designing. **Report Field Favorites** contains fields you marked as favorites. **Dialog Fields** contains dialog fields you set up for the current report.

Report Fields is further divided into fields specific to the Category in which you added the user report, and "SystemInformation" fields. System Information is data that spans Categories, including the database name, system date, and - in the case of Tax - the current season. When you highlight a field in the Field List, a snapshot of information is provided in the Selected Field Information box.

Field List	Toolbox	Property Grid
Search:		
	SystemInformation CurrentRecordCo CurrentSeason CurrentSeason CurrentSeason DatabaseName DatabaseServerf MunicipalityName ProgramAbbrevia ProgramName SystemDate TaxyearCurrent	ounter CurrentSeason: Name ation (TaxYear)
Selected Field	d Information:	
Table: SystemInfo Report Field Municipality Description No Descrip	rmation <u>1:</u> /Name (MunicipalityN <u>:</u> tion Available	ame)

Toolbox

This tab offers tools to aid you in the design of your report (text labels, lines, pictures, etc.).



Tax. NET: Report Designer

Property Grid

This tab lets you set the properties of the currently-selected field or section, such as font and size, text alignment, etc.

Field List	Toolbox	Property Grid
Page_Header	DevExpress.X	(traReports.UI.P 🔫
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> Appearance	e	
> Behavior		
> Data		
> Misc		
Appearance		

Set the Report Page Layout (Portrait or Landscape)

For the purpose of this course, we will use the default Portrait page layout. To change the page layout to Landscape, go to Format>Report Page Layout.



Add a Section

When we added the report, we did not include the Report Footer.

1. Right-click in any section.

🕿 Report Designer - My Class Report	_		×
File Edit Format View B Save X Cut Copy Paste B Bold Courier New - 9 - B Bold I Italic B Hide Toolbox Field List and Property Grid Manage Dialog Fields Ø Zoom In Standard Courier New Paste I Italic	\underline{U} Underl	line	Ŧ
Field List Toolbox Property Grid Page_Header DevExpress.XtraReports.UI.P > Appearance > Design > Layout > Misc	4 .		5
Appearance Currently Selected Field: <section> Page_Header</section>			>

2. Select Insert Section, then Report Footer.



The section is added in its "natural" location.

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Field List Toolbox Property Grid	Less terms terms term	. 2	· 5
ParcelMaster_Section_ReportFooter Dev -	Page_Header [one section	n per page]	
2↓ □	:		
> Appearance	1 -		
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	1 :		
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	:		
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Appearance			
	<		>
Currently Selected Field: <section> ParcelMaster</section>	_Section_ReportFooter		:

Resize a Section

In our example, the ParcelMaster_Section is the Detail section. Fields placed in this section will repeat for every record found. To keep the report from containing too much "white space" between records, we need to shrink this section.

1. Position your cursor on the border between the **ParcelMaster_Section** (Detail) and **ParcelMaster_Section_Report Footer**.



Tax. NET: Report Designer

2. Press and hold down your left mouse button and drag your mouse up.



3. Release your mouse button.

	1 • • • 5
Page_Header [one section per page]	
-	
= 🗖 🗐 ParcelMaster Section	
= ParcelMaster_Section_ReportFooter [one section per report]	
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tion	

If you wish to increase or decrease the depth of the header and/or the footer section (pictured), place your cursor at the bottom of that section and repeat, moving up or down.

	4 1 5
Page_Header [one section per page]	
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= 🖃 🛄 ParcelMaster_Section	
ParcelMaster_Section_ReportFooter [one section per report]	
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Add Fields

This lesson will add a label field and a data field, in two different sections. The label field "describes" the data that will appear in the data field.

Label Field

1. Click the Toolbox tab.



Tax. NET: Report Designer

2. Position your cursor on top of Text Label, press and hold down the left mouse button, and drag your cursor to the bottom left of the Page Header.



3. Release your mouse button. The label is placed, and defaults to Text Label.

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Field List Toolbox Property Grid		3 4
▶ Pointer	Page_Header [one section per page]	
A Text Label	:	
A Data Label	-	
Calculated Field	· Dirext Label D	
BarCode		
CheckBox	= - II ParcelMaster_Section	
Line	:	
PageBreak	= - ParcelMaster_Section_ReportFooter	[one section per report]
Parter Prom File		
Picture (Bound)		
IIII QR Code		
G Shape		
Table		
🔢 ZipCode		
	<	>
Currently Selected Field: Text Label		

Tax. NET: Report Designer

4. While the field is "selected" (surrounded by a border and handles), type Parcel Number. Do not press Enter.



5. Click an area outside of the selection box to "place" the label field.

Report Designer - My Class Report (MODIFIED	*	— 🗆 X
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Field List Toolbox Property Grid		4 5
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A Text Label		
A Data Label	-	
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V CheckBox	= 🖃 🧾 ParcelMaster_Section	
∠ [≁] Line		
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Picture From File		
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A Shape	1	
Table		
ZipCode		
	<	>
Currently Selected Field: <section> Page Header</section>		:

Your screen may resemble the screen shot above, where we can't see the entire word, "Number." Resizing a field will be covered shortly.

Data Field

1. Click the Field List tab.

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Field List Toolbox Property Grid	• • 4 •	• • • •	· · 5
Search:			
Report Fields Benort Fields Benort Fields Benort FieldsAddTable Benort FieldsAddTable Benort Field Stable Benort Field Favorites			
E → Dialog Fields			
= _ ParcelMaster_Section_ReportFooter [one section per report]			
Selected Field Information:			
			>
Currently Selected Field: <section> Page Header</section>			.:

2. We want to add the data field that will bring in the parcel number. We can expand the ParcelMaster list beneath Report Fields and scroll until we find it, or we can search for it.
Position your cursor in the Search box and type **parceln**. As each character is typed, the intelligent search features kicks in and tries to find matching fields.



3. Position your cursor on top of ParcelNumber_MASTER, press and hold down the left mouse button, and drag your cursor to the Detail section, below the location of the label field from the last exercise.



4. Release your mouse button and click an area outside the selection box to place the data field.



Your screen may resemble the screen shot above, where the alignment of the label field and the data field is off. Aligning fields will be covered shortly.

Resize a Field (Stretch; Shrink)

The Parcel Number label field from our last lesson is too small to accommodate the visibility of all letters.

1. Click on top of the Parcel Number label field. Notice the handles that surround it.

•	
· · · · · · ·	Parcel Numb
=	ParcelMaster_Section
	[ParcelNumb]
=	ParcelMaster_Section_ReportFooter [one section per report]

2. Position your cursor over the handle that appears along the right side of the selection box.



3. Press and hold the left mouse button and drag your cursor to the right.



4. Release the mouse button.

	Page_Header [one section per page]
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•	D Brancel Number (A) D D D
=	ParcelMaster_Section
•	[ParcelNumb]
=	ParcelMaster_Section_ReportFooter [one section per report]
•	

5. Repeat for the data field.

	Page_Header [one section per page]
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-	
•	Parcel Number
=	ParcelMaster_Section
÷	□ □ [ParcelNumber MASTER] □
=	ParcelMaster_Section_ReportFooter [one section per report]
•	

Add an Object (Line; Shape; Picture; etc.)

This lesson adds a line to the Page Header, to make the label fields that get placed there "pop" as headings.

1. Click the Toolbox tab.



2. Position your cursor on top of Line, press and hold down the left mouse button, and drag your cursor to a location beneath the Parcel Number label field in the Page Header.



3. Release your mouse button. The line is placed.

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A Data Label			
Calculated Field			
CheckBox			
[ParcelNumber MASTER]			
PageBreak			
Picture From File			
Picture (Bound)			
IIIII QR Code			
of Shape			
III Table			
ZipCode			
<			>
Currently Selected Field: [Unbound]			

We can increase the length of the line by way of the handle, like we did for the label and data fields, or we can use the Property Grid tab. This will be covered shortly.

Align Fields

We now have three fields (two fields and one object; but for these purposes, we'll just use the term "fields") on our report, none of which are aligned along the same axis.

1. You should still be on the Toolbox tab. Click on Pointer.



2. Position your cursor above the Parcel Number label field, press and hold down the left mouse button, and drag your mouse down through all three fields.



3. Release your mouse button. All three fields are selected.

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4. Go to Format>Align and select Lefts.

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A Text Label	Align	•	Lefts				
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📋 Calculated	Horizontal Spacing	•	Rights	l Number D			
BarCode	Vertical Spacing	•	Tops				
CheckBox	Center in Form	•	Middles	laster_Section			
Line	Order	•	Bottoms	[ParcelNumber	MASTER]		
PageBreak	Penert Dage Laveut	<u> </u>	To Grid	laster_Section_Repo	ortFooter [one section per report]		
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Picture From	n File						
Picture (Bou	ind)		-				
IIII QR Code							
🔁 Shape	1 Shape						
Table							
🔡 ZipCode							
Currently Selected Field: <multiple></multiple>							

The fields are aligned.



Move Fields

This lesson takes the three fields from the previous lesson and moves them to the left.

1. You should still be on the Toolbox tab, and Pointer should still be the active tool.



2. Repeat the selection method shown in the previous lesson.

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IIII QR Code			
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Table			
			,
Currently Selected Field: <section> Page_Header</section>			

3. You can either press and hold your left mouse button on any of the fields and click/drag, or use your keyboard's arrow keys. Regardless of your chosen method, move the fields to the left.



4. Click outside any of them to remove the selection. Move the line object a little further left, using whichever method you're comfortable with.

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J ZipCode				
Currently Selected Field: [Unbound]				

Summarize Fields

Numeric fields can be summarized in the footer of a report. In this lesson, we will add two additional data fields (and their accompanying label fields) that will be summarized in the Report Footer.

1. Click the Toolbox tab and add a Text Label called Sum Billed Amt. If necessary, stretch the field to accommodate the letters.

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IIII QR Code				
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Table				
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<	>			
Currently Selected Field: <section> Page_Header:</section>				

2. Add another label field for Win Billed Amt. You can either repeat the action from step 1, or copy/paste the label from step 1 (used in this example).



Click the caret in the upper right of the label field and change Sum to Win (field properties will be covered in more detail later in the class).



3. Add the data fields to pull in the summer and winter billed amounts.

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4. Copy/paste both of them into the Report Footer.

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Description: No Description Available	
Currently Selected Field: <section> defaultParcelReport1</section>	× * * * * * * * * * * * * * * * * * * *

5. Click the SumTaxesBilled data field to select it, then click the caret to open its properties.

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Currently Selected Field: [SumTaxesBilled]	

6. Click the ellipsis at the right edge of the Summary setting.

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< >> Selected Field Information:	Edit Text Format string: 2.8 C Can Grow (0.40.00" (#0.00)) 3.3 Multime 14.00
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Currently Selected Field: [SumTaxesBilled]	Summary None OK Cancel

7. Click the dropdown at the right edge of the Summary Function setting.

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	<null></null>
	0.3
Summary function:	-0.4
Sum	1.5
Average	5
Count	2.8
Sum	3.3
Max Value Min Value	14.00
Average (Distinct)	
Count (Distinct)	
Sum (Distinct) RecordNumber	
Percent Change	
O Page O Report	
	OK Cancel

[class discussion of the options]

Add Date and Page Numbering

To include the date on which the report is generated, we will add a SystemInformation field from the Field List. Page numbering is added from the Toolbox.

1. Click the Field List tab and expand the Report Fields category.



2. Expand the SystemInformation category, then click/drag SystemDate to the upper left corner of the Page Header.



Release the mouse button to place the field.



3. Click the Toolbox tab, then click/drag PageInfo to the upper right corner of the Page Header.



Release the mouse button to place the field.

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]] ZipCode	
	>
Currently Selected Field: [Unbound]	

Notice how it defaults to 1/1. This means that when the report is generated, you will see [page number] / [number of pages].

09/09/2019	1/77
Parcel Number	Sum Billed Amt Win Billed Amt
051-000-000-02	
051-000-000-03	
051-000-000-04	

If you would rather see just the page number, click the caret, click the dropdown next to Page Info, and select Number.



The printed result:

09/09/2019		1	
Parcel Number	Sum Billed Amt	Win Billed Amt	
051-000-000-02			
051-000-000-03			
051-000-000-04			

Properties (Appearance) and Field Tasks

So far, field properties have been touched upon, but not explored in detail. This lesson will primarily consist of class discussion.

Each field on the report has its own "tasks" menu that is accessed by clicking on the caret that is provided in the upper right corner when the field is selected.

	Page_Header [one section per page]								
	[systemdate]								
• • •	Parcel Number Sum Billed Amt Win Billed Amt								
=	🖃 🧾 ParcelMaster_Section 🛛 🔦								
÷	C [ParcelNumber MASTER]								
=	ParcelMaster_Section_ReportFooter [one section per report]								
	[taxbill_nc] [taxbill_nc]								

The tasks menu is an abridged form of the properties available in the Property Grid. Pictured is an example using a data field. Label (Text) fields, System fields, and Objects all behave in a similar fashion.

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	Nordwrap	raise			Text	Data Label					
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	DisplayObjectFilter										
	Summary	None	1								
	Text	Data Label									
~	Design										
	(Name)	Label1									
\sim	Layout										
>	Location	36, 8									
>	Size	183, 16									
~	Misc										
>	Font	Courier New, 9pt									
	ForceCaps	False									
	IsTrueFalseLogica	False									
	LogicalFalseString	N									
	LogicalTrueString	Y									
	NoDBValueString	- 1									
	SuppressZeros	False									
Edi	it Text										
Te	xt										
Curr	ently Selected Field	:: [ParcellNumber_IVIASTER]	1								

In an earlier lesson, we showed you how to resize fields by using handles. Resizing can also be done in the Property Grid. In this example, we've selected the line object. Its length defaults to 100 pixels.



We've changed 100 to 600.



The Property Grid tab reflects the element currently selected. This will be a data or label field, an object (line, box, etc.), or the section itself. Pictured is an example where the Report Footer section is the active selection.



Dialog Fields

Dialog Fields

Set Up the Dialog Field

A dialog field prompts users for input.

1. Go to Edit>Manage Dialog Fields.


Dialog Field Manager	×
Dialog Field Pri Dialog Field Pri User Prompt: Get Text Val Max Text	Add Delete Move Up Move Down ame for the new Dialog Field e OK Cancel
Num decimal Places:	0
O Get Date Value	
🔵 Get Yes/No Value	
	OK Cancel

2. Click Add and enter a name - no spaces - for the dialog field.

3. Click Ok. You may now set the properties of the dialog field.

Dialog Field Manager	×
SummerDueDate	Add Delete Move Up Move Down
Dialog Field Properties User Prompt: SummerDueDate Get Text Value	
Max Text Length: 20	
O Get Numeric Value	
Num decimal Places: 2	
O Get Date Value	
O Get Yes/No Value	
	OK Cancel

For our example, we will accept the default Get Text Value. When we receive the prompt, we will be able to enter the due date as (using Summer as an example) 9/15/xx, or Sept 15, xx, or September 15, xxxx; our only restriction will be the Max Text Length we can enter here. Examples of Numeric, Date, and Yes/No Values are given below.

4. Add a dialog field for the winter date, and call it WinterDueDate.

Dialog Field Manager	\times
SummerDueDate WinterDueDate	Add Delete Move Up Move Down
Dialog Field Properties User Prompt: WinterDueDate Image: Set Text Value Max Text Length: 20	
Get Numeric Value Num decimal Places; Get Date Value Get Yes/No Value	
ОК	Cancel

The order in which the dialog fields appear is the order in which the user will be prompted. In this example, the user will be prompted to enter the Summer due date, then the Winter due date. You control the order in which users get prompted by using the Move Up and Move Down buttons.

Dialog Field Manager	Х
SummerDueDate WinterDueDate	Add Delete Move Up Move Down
Dialog Field Properties	
User Prompt: SummerDueDate	
Get Text Value	
Max Text Length: 20	
O Get Numeric Value	
Num decimal Places: 2	
◯ Get Date Value	
O Get Yes/No Value	
ОК	Cancel

5. Click Ok.

Dialog Prompt Examples

Once the dialog fields have been created, they will be available to add to the report (next lesson). Upon running the report (two lessons from now), users will be prompted for data entry according to the type of dialog fields that have been added. Our example above uses Text; pictured are what the prompts will look like for Numeric, Date, and Yes/No dialog fields.

Dialog Field	d Value		
NumericPr	ompt		
		0.0	0
	Prev	Next	Cancel
Dialog Field	d Value		
DateProm	pt		
11			
	Prev	Next	Cancel
Dialog Field	d Value		
YesNoPror	npt		
No			•
No			
Yes			
	Prev	ОК	Cancel

Add the Dialog Field to Your Report

1. Click the Field List tab and expand the Dialog Fields category. You will see the two dialog fields we created in the last lesson.

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Field List Toolbox Property Grid • • • • • • • • • • • • • • • • • • •	. 3 4 5
Search:	
Bealdt [systemdate]	1
MemoryFieldsAddlTable MemoryFieldsAddlTable Parcel Number Sum Bil	lled Amt Win Billed Amt
ParcelMaster = ParcelMaster_Section	
Page Report Field Favorites [ParcelNumber_MASTER] [SumTage Statement of Statement o	axesBi
SummerDueDate SummerDueDate SummerDueDate SummerDueDate	on per report]
Taxba	ll_nc [taxbill_nc
Colorida Tield Teferen Kenn	
Table:	
SystemInformation	
SystemDate	
Description: No Description Available	
<	>
Currently Selected Field: <section> defaultParcelReport1</section>	

2. Click/drag the SummerDueDate field to the Page Header, just above the Sum Billed Amt label field.



3. Repeat for the WinterDueDate field.



4. Save and exit the report.

Test the Dialog Field

1. Make sure the Name field is displaying your user report and that the Destination is set to Screen, and click Run Report.

Run Reports	×
🕤 Add Report 👌 Delete Report 🛛 📝 Edit 🛛 🞯 Rename 🛛 😡 Audit 🛛 🎉 Tools	•
Report	
Category: Parcel Reports	
Name: My Class Report Report Options	
Report Population	
Population: All Records Pop. Options	
Spec. Pop.: Ad Valorem+Special Acts	
Apply Advanced Query to Population	
Advanced Query	
Sort Index: Parcel #	
Destination: Screen	
Number of Copies: 1 Margins/Fonts	
Current Printer: \\ramona\SAVIN131 Printer Settings	
Show Sample Reports Run Report Close	

2. You will receive a Report Options dialog. Leave the Include Inactive Parcels setting unchecked and click Close.

Run Reports ×
👩 Add Report 👌 Delete Report 🛛 📝 Edit 🛛 🞯 Rename 🗍 😡 Audit 🛛 🎉 Tools 👻
Report Category: Parcel Reports Name: My Class Report Report Options
My Class Report - Options × Additional Report Options Include Inactive Parcels
Close
Number of Copies: 1 Margins/Fonts Current Printer: \\ramona\SAVIN131 Printer Settings
Show Sample Reports Run Report Close

Run Reports
👩 Add Report 👌 Delete Report 🛛 📝 Edit 🛛 💇 Rename 🛛 😡 Audit 🛛 鎽 Tools 👻
Report
Category: Parcel Reports
Name: My Class Report Report Options
Report Population Dialog Field Value
Spec. Por SummerDueDate
Sort Inde Prev Next Cancel
Destination: Screen
Number of Copies: 1 Margins/Fonts
Current Printer: \\ramona\SAVIN131 Printer Settings
Show Sample Reports Run Report Close

3. You are prompted to enter the SummerDueDate.

4. Because we set this up for text entry, you may enter the date in any format you wish. Do so and click Next.

Run Reports >	<
🕤 Add Report 👌 Delete Report 🛛 📝 Edit 🛛 💇 Rename 🛛 😡 Audit 🛛 🍒 Tools 👻	
Report	
Category: Parcel Reports	
Name: My Class Report Report Options	
Report Population Dialog Field Value	
Spec. Pop SummerDueDate	
9-15-xxxx	
Sort Inde Prev Next Cancel	
Destination: Screen	
Number of Copies: 1 Margins/Fonts	
Current Printer: \\ramona\SAVIN131 Printer Settings	
Show Sample Reports Run Report Close	

The button is labeled Next to indicate that more prompts are coming.

5. You are prompted to enter the WinterDueDate. Do so and click Ok. The button is labeled Ok to indicate that this is the final (if not the only) prompt.

The report processes and appears onscreen. For illustrative purposes, we have entered the due dates differently.

09/10/2019		1	
	9-15-xxxx	Feb 15 xxxx	
Parcel Number	Sum Billed Amt	Win Billed Amt	
051-000-000-02	0.00	0.00	
051-000-000-03	0.00	0.00	
051-000-000-04	0.00	0.00	

6. Close the report to return to the Run Reports dialog, then click the Edit button to return to the Report Designer.

Calculated Fields and If Statements

Calculated Fields and If Statements

Create a Calculated Field

Calculated fields are custom fields that use mathematical expressions to achieve a specific output. In this lesson, we will add a calculated field to the Detail section that adds the Summer Billed Amount and the Winter Billed Amount. Time-permitting, more complicated examples may be addressed as part of class discussion.

- 1. If you haven't already, click the Show Toolbox, Field List, and Property Grid button.
- 2. Click the Toolbox tab, then click/drag Calculated Field to the right of the WinTaxesBilled data field in the Detail section.



3. When you release your mouse button, your screen should resemble the following picture.

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Expression Name:			4 1 5 1 6 1
Use If-Statement Edit If-Statement	uick If-Statement Wizard	^ v	i (DIALOG)[wi] Win Billed Amt
O UseExpression		Tenart Value	inTaxesBi
		+ - * / "(" ")" Edit Value/Function Remove	axbill_nc
			‹
Shortcut Keys: (D) - Quick Insert Data Column	- (F) Quick Insert Function - (V) Quick Insert Value - (E	Quick Insert Expression	
Switch to Advanced View		OK Cancel	4

4. Type TotalBilledAmt in the Expression Name field, then click the UseExpression radio button.



5. The formula we're going to use, if written out longhand, would read as follows:

```
(SumTaxesBilled(taxbill_nointrst_0) +
WinTaxesBilled(taxbill_nointrst_1))
```

It is important that the field name be exact, so it is oftentimes easier to use the buttons to the right of the expression entry box and select the field name, rather than attempt to type it out. 6. Click the open parenthesis button. It is placed at the top of the entry box.

Calculated Expression Editor	—		×
Expression Name: TotalBilledAmt OUse If-Statement Edit If-Statement Quick If-Statement Wizard			
			÷
UseExpression	Insert V + - Edit Value/ Rem	/alue * Function ove	1
Shortcut Keys: (D) - Quick Insert Data Column - (F) Quick Insert Function - (V) Quick Insert Value - (E) Quick Switch to Advanced View	Insert Expression	n Can	cel

7. Click the Insert Value button, then click the Data Column radio button.



8. Open the ParcelMaster category and locate **SumTaxesBilled(taxbill_nointrst_0)**.



9. Click Ok to return to the Add Value dialog.

×
1
Ъ

10. Click Ok to return to the Calculated Expression Editor dialog.

Calculated Expression Editor	_		×
Expression Name: TotalBilledAmt O Use If-Statement Edit If-Statement Quick If-Statement Wizard			
UseExpression			Y
<pre>{ (Column) SumTaxesBilled(taxbill nointrst 0) </pre>	Insert V + - "(" Edit Value/i Remo	alue * [")" Function.	/
Shortcut Keys: (D) - Quick Insert Data Column - (F) Quick Insert Function - (V) Quick Insert Value - (E) Quick Insert Expression			
Switch to Advanced View	ОК	Cano	:el

11. Click the plus sign button. Click the Insert Value button, then click the Data Column Radio button. The Data Column Selector has retained the set of fields you searched through when trying to locate the summer billed field. Locate **WinTaxesBilled(taxbill_nointrst_1)**.

Data Column Selector	×
<pre>vinded in the interview of the inte</pre>	
ОК	Cancel

12. Click Ok to return to the Add Value dialog, then click Ok again to return to the Calculated Expression Editor dialog. Click the close parenthesis button. Your screen should resemble the following picture.

		_	~
Calculated Expression Editor	_		X
Expression Name: TotalBilledAmt O Use If-Statement Edit If-Statement Quick If-Statement Wizard			
			~
	Insert V	alue	
(Column) SumTaxesBilled(taxbill nointrst 0)			_
(Column) WinTaxesBilled(taxbill nointrst 1)	+ -	")" Function	/
Shortcut Keys: (D) - Quick Insert Data Column - (F) Quick Insert Function - (V) Quick Insert Value - (E) Quick Insert Expression			
Switch to Advanced View	ОК	Canc	el

13. Click Ok to return to the Report Designer. The calculated field is saved.

Z Report Designer - My Class Report (MODIFIED)* - 🗆 🗙
File Edit Format View
🗄 🗄 Save 🛛 🔏 Cut 📳 Copy 📋 Paste 🖓 Undo 🚱 Redo Courier New 🔹 9 🔹 🖪 Bold 🛛 Italic 💆 Underline
📰 Hide Toolbox, Field List and Property Grid 🛛 🔌 Manage Dialog Fields 🛛 💐 Zoom In 🔍 Zoom Out
Field List Toolbox Property Grid 2 2 3 1 4 1 5 1 6 1 <th1< th=""> <th1< th=""> <th1< t<="" td=""></th1<></th1<></th1<>
Pointer per page]
A Text Label
A Data Label
Calculated Field
III BarCode
CheckBox
Line [SumTaxesBig] [SumTaxesBig] [(CALC) Tota]
PageBreak
PageInfo
Panel
Picture From File
Picture (Bound)
I I I
Currently Selected Field: [(CALC)TotalBilledAmt]

- 14. Save and exit the report. Run the report to see the results.
- 15. Close the report to return to the Run Reports dialog, then click the Edit button to return to the Report Designer. Delete the calculated field. We're going to replace it with an If-Statement in the next lesson.

Create an If-Statement

If-Statements are calculated fields that use conditional, **if-true-then-[this]**; **if-false-then-**[**that**] expressions. In this lesson, we will add an If-Statement to the Detail section that returns the words "SUM TAX PAID" if true, and the summer balance due if false. Time-permitting, more complicated examples may be addressed as part of class discussion.

- 1. If you haven't already, click the Show Toolbox, Field List, and Property Grid button.
- Click the Toolbox tab, then click/drag Calculated Field to the right of the WinTaxesBilled data field in the Detail section. When you release your mouse button, the Calculated Expression Editor appears just like in the previous lesson. Type SumBillPaid in the Expression name field. Use If-Statement is selected by default.



3. Click the Quick If-Statement Wizard button. The first part of the wizard appears.

Quick If-Statement Wizard	
Create Condition For If-Statement This is the logic that will be tested when the calculated expression is evaluated. Fo "IF Amount > 500 THEN Amount ELSE 0", the condition is the "Amount > 500" part.	r example, if your if-statement is
(- ft U	
	0.000000
O Data Column: <not set=""></not>	0.000000
O Function: <not set=""></not>	
	Naw Edit
	Luitin
	<u>^</u>
	v
Operator	
Operator: == (Equal To)	
Right Hand Side	
Constant Value: Type: Number Value:	0.000000
O Data Column: <not set=""></not>	
O Function: <not set=""></not>	
Calculated Expression: <a>No Existing Calculated Expressions>	New Edit
	^
	¥
Back	Next Cancel

4. Click the Data Column radio button, expand the ParcelMaster category, then the ParcelReadOnly category.

Data Column Selector	\times
ParcelMaster ParcelAdjustments ParcelAdjustments ParcelAdjustments ParcelCustomReadonly adjBaseTaxForDeferral_0 adjBaseTaxForDeferral_1 adjBaseTaxForDeferral_2 AdvaloremTaxesSum (ad_voloreum_noadmin_0) AdvaloremTaxesVil (ad_voloreum_noadmin_1) all_specials_mills assessment_adjust_date assessment_adjust_display_0 assessment_adjust_display_1 assessment_adjust_display_2	*
OK Cancel	



5. Locate **totalbill_left_display**.

6. Click Ok to return to the Quick If-Statement Wizard. Operator defaults to Equal To. Right Hand Side defaults to Constant Value/Number/0.000000.

Column: Value: 0.000000 Operator Operator: = (Equal To) Right Hand Side 0.000000 0 Operator: = (Equal To) New Edit Right Hand Side 0.000000 0 0.000000 Data Column: (Not Set>) New Edit Calculated Expression: (No Existing Calculated Expressions) New Edit Perator 0.000000 0 Data Column: (Not Set>) New Edit Calculated Expression: (No Existing Calculated Expressions) New Edit New Decator 0 0.000000 Image: Column: Not Set> New Edit Calculated Expression: (Not Set>) Not Set> New Edit Image: Calculated Expression: Not Existing Calculated Expressions> New Edit Back Next Cancel Cancel Edit Image: Cancel	Quick If-Statement Wizard	
Left Hand Side O.000000 Obtata Column: (Column) ParcelReadonly.totalbill_left_display Function: <not set=""> Calculated Expression: <no calculated="" existing="" expressions=""> Operator Operator: Operator: == (Equal To) Right Hand Side 0.000000 O Data Column: <not set=""> Calculated Expression: <not set=""> Perator: == (Equal To) Value: 0.000000 Data Column: <not set=""> Function: <not set=""> Calculated Expression: <not set=""> Back Next</not></not></not></not></not></not></not></not></not></no></not>	Create Condition For If-Statement This is the logic that will be tested when the calculated expression is evaluated. For example, if your if-s "IF Amount > 500 THEN Amount ELSE 0", the condition is the "Amount > 500" part.	tatement is
Constant Value: Type: Number Velue: Data Column: (Column) ParcelReadonly.totalbill_left_display Function: <not set=""> Calculated Expression: <no calculated="" existing="" expressions=""> V Operator Operator: == (Equal To) Right Hand Side • Constant Value: 0.000000 Data Column: <not set=""> Right Hand Side • Constant Value: Type: Number Value: • Calculated Expression: * Value: * Value: *</not></no></not>	Left Hand Side	
Data Column: (Column)ParcelReadonly.totalbill_left_display Function: <not set=""> Calculated Expression: <no calculated="" existing="" expressions=""> New Edit Operator Operator: == (Equal To) Right Hand Side © Constant Value: Type: Number Value: Obtata Column: <not set=""> Function: <not set=""> © Calculated Expression: <not calculated="" existing="" expressions=""> Value: Outer Column: <not set=""> © Calculated Expression: New Edit Back Next</not></not></not></not></no></not>	O Constant Value: Type: Number Value:	0.000000
Function: <not set=""> Calculated Expression: <no calculated="" existing="" expressions=""> Operator Operator: == (Equal To) Right Hand Side Oconstant Value: Type: Number Value: O.000000 Data Column: <not set=""> Function: <not set=""> Function: <not set=""> Calculated Expression: <not set=""> Function: <not set=""> Back Next Cancel</not></not></not></not></not></no></not>	Data Column: (Column) ParcelReadonly.totalbill_left_display	
Calculated Expression: <no calculated="" existing="" expressions=""> New Edit Uperator Operator Operator: == (Equal To) Right Hand Side • Constant Value: Type: Number Value: 0.000000 Data Column: <not set=""> • Function: <not set=""> • Calculated Expression: Back Next Cancel</not></not></no>	O Function: <not set=""></not>	
Operator Operator: == (Equal To) Right Hand Side O Constant Value: Type: Number Value: 0.000000 Data Column: Punction: Not Set> Calculated Expression: New Edit Back Next	Calculated Expression: No Existing Calculated Expressions >	Edit
Operator Operator: == (Equal To) Right Hand Side • Constant Value: Type: Number value: 0.000000 • Data Column: <not set=""> • Function: <not set=""> • Calculated Expression: <no calculated="" existing="" expressions=""> • New Edit • Back Next Cancel</no></not></not>		
Operator Operator: == (Equal To) Right Hand Side • Constant Value: Type: Number • Value: 0.000000 • Data Column: <not set=""> • Function: <not set=""> • Calculated Expression: <no calculated="" existing="" expressions=""> • New Edit • Back Next Cancel</no></not></not>		
Operator Operator: = (Equal To) Right Hand Side • Constant Value: Type: Number • Value: 0.000000 Data Column: Number • Value: 0.000000 Data Column: Not Set> • Function: <not set=""> • Calculated Expression: <no calculated="" existing="" expressions=""> • Back Next</no></not>		~
Operator: == (Equal To) Right Hand Side Constant Value: Type: Number Value: O.000000 Data Column: Not Set> Calculated Expression: <	Operator	
Right Hand Side • Constant Value: Type: Number • Data Column: • Data Column: • Function: • Calculated Expression: • Not Set> • Calculated Expression: • No Existing Calculated Expressions> • Back • Next • Cancel	Operator: == (Equal To)	
Right Hand Side Constant Value: Type: Number Value: 0.000000 Data Column: <not set=""> Function: <not set=""> Calculated Expression: Calculated Expression: New Edit Back Next</not></not>		
Constant Value: Type: Number Value: 0.000000 Data Column: Not Set> Function: Not Set> Calculated Expression: No Existing Calculated Expressions> New Edit Back Next Cancel	Right Hand Side	
○ Data Column: ○ Function: ○ Calculated Expression: ○ Calculated Expression: ○ Calculated Expression: ○ Back Next Cancel	O Constant Value: Type: Number ▼ Value:	0.000000
Function: <not set=""> Calculated Expression: <no calculated="" existing="" expressions=""> New Edit Back Next Cancel</no></not>	O Data Column: <not set=""></not>	
Calculated Expression: <no calculated="" existing="" expressions=""> New Edit Back Next Cancel</no>	O Function: <not set=""></not>	
Back Next Cancel	○ Calculated Expression: New	Edit
Back Next Cancel		^
Back Next Cancel		
Back Next Cancel		~
	Back Next	Cancel

7. Click Next. We are now on the "if true" part of the wizard. Constant Value is the default selection. Change Type to String, and type SUM TAX PAID in the Value field.

Quick If-Statement Wizard	
If TRUE Value Select the value you would like to use if the condition for your If-Statement is TRUE	
TT TDUE ushus	
O Data Column: <not set=""></not>	
European (Not Set)	
Calculated Expression: New	Edit
	Luitin
	<u> </u>
Back Next	Cancel

In effect, we just told the program that if it is true that the bill has been paid in full, we want the report to display "SUM TAX PAID." Now we need to tell the program what to display if that is NOT true, i.e., the bill has not been paid at all, or has only been partially paid.

8. Click Next. We are now on the "if false" part of the wizard. Click the Data Column radio button, locate totalbill_left_display, and click Ok to return to the Quick If-Statement Wizard.

Quick If-Statement Wizard	
If FALSE value	
Select the value you would like to use if the condition for your If-Statement is FALSE	
If FALSE value	
Constant Value: Type: Number Value:	0.000000
Data Column: (Column) ParcelReadonly.totalbill_left_display	
O Function: <not set=""></not>	
Calculated Expression: <no calculated="" existing="" expressions=""></no>	Vew Edit
	<u>^</u>
	×
Back	Finish Cancel

9. Click Finish. You return to the Calculated Expression Editor, and your If-Statement appears in full.

Calculated Expression Editor	— 🗆 X		
Expression Name: SumBillPaid Use If-Statement Edit If-Statement Quick If-Statement Wizard			
<pre>IF (Column) ParcelReadonly.totalbill_left_display == 0 THEN "SUM TAX PAID" ELSE (Column) ParcelReadonly.totalbill_left_display</pre>	~		
OUseExpression			
	Insert Value		
	+ - * /		
	"(" ")"		
	Edit Value/Function		
	Remove		
Shortcut Keys: (D) - Quick Insert Data Column - (F) Quick Insert Function - (V) Quick Insert Value - (E) Quick Insert Expression			
Switch to Advanced View	OK Cancel		

10. Click Ok to return to the Report Designer. The calculated field is saved.



11. Save and exit the report. Run the report to see the results.

Advanced Queries

Advanced Queries

Filters and Conditions; And/Or

Advanced queries give you the flexibility of setting up simple queries, such as "find records where value equals X," and setting up more complex queries involving multiple filters and conditions on those filters. Filters and conditions depend on AND and OR statements, which are defined by determining "All" (AND) or "Any" (OR).
dvanced Query	Save Query To DB 🗮 Loa	d Ouerv From DB	Delete Query From D)B Broot (Queries To File 🖶 Imp	X
Information		car i ar i	_ Delete Query Home		zacines for the -16 timp	
An advanced que	ery is comprised of any number of	of filters, each filter r	naving its own set of co	nditions.		
Report Data mu	ALL filters ALL filters ALL filters		naicions for filter Li	1e 1		
Enabled Filter	r Line					
Current query de	scription					
Filter Name	Condition(s)					
	1.000			-		
						\sim
						Close

Filters: Report Data Must Match

ALL: The report engine will return only those records that match every filter set up in the Filters pane, using that filter's conditions.

For example, you have two filters: one looking for A and one looking for B. Of 200 records, 50 records meet only the criteria for filter A, 30 records meet only the criteria for filter B, 20 records meet the criteria for both, and 100 records meet neither. As a result, 20 records will be returned.

ANY: The report engine will return records matching either filter.

For example, you have two filters: one looking for A and one looking for B. Of 200 records, 50 records meet the criteria for filter A, 30 records meet the criteria for filter B, 20 records meet both, 100 records meet neither. As a result, 100 records (the 50/30/20 records) will be returned.

Conditions: Filter Must Match

An advanced query is comprised of any n	number of filters, each filter having its own set o	of conditions.		
ilters	Conditions for filte	'Line 1'		
	Filter must match:	ALL conditions	-	
	Add Edit	ALL conditions ANY conditions	`	Delete
	Field Name	Operator	Field Value	Туре
rent query description:				
rrent query description: Iter Name Condition(s)				
rrent query description: Iter Name Condition(s)				
rent query description: Iter Name Condition(s)				
rrent query description: Iter Name Condition(s)				

ALL: Only those records that match every condition set for the currently-highlighted Filter Line will be included.

For example, you have two conditions: one looking for records that "equals" C and one looking for records that are "less than" D. Of 100 records, 20 records meet only the "equals" condition; 10 records meet only the "less than" condition; 5 records meet both; 65 records meet neither. As a result, 5 records <u>may</u> be included (we say "may," because the number of records included will also be affected by your <u>filter</u> selection).

ANY: Records matching either condition set for the currently-highlighted Filter Line will be included.

For example, you have two conditions: one looking for records that "equals" C and one looking for records that are "less than" D. Of 100 records, 20 records meet only the "equals" condition; 10 records meet only the "less than" condition; 5 records meet both; 65 records meet neither. As a result, 35 records <u>may</u> be included (we say "may," because the number of records included will also be affected by your <u>filter</u> selection).

Set Up an Advanced Query

This lesson will guide you through setting up a simple query to find parcels that have paid their winter taxes, but not their summer taxes. Time-permitting, complex queries may be addressed as part of class discussion.

1. From the Run Reports dialog, select Parcel Reports as the Category, and Simple List as the Name.

Add Report	o Delete Report 🛛 📝 Ed	lit 💇 Rename	🔊 Audit 🛛 🎉 Tools 👻
Category:	Parcel Reports	•	
Name:	Simple List	-	Report Options
Report Pop	ulation		
Population:	All Records	-	Pop. Options
Spec. Pop.:	Ad Valorem+Special Acts	-	
	Apply Advanced Query	to Population	
	Advanced Query		
Sort Index:	Parcel #		
Destina	ation: Screen	•	
Number of Co	ppies: 1		Margins/Fonts
Current Pr	inter: \\ramona\SAVIN131		Printer Settings
Show Sam	ole Reports	Run Report	Close

2. Check the Apply Advanced Query to Population box. The Advanced Query button becomes enabled.

Run Reports	×
👩 Add Report 🍵 Delete Report 🛛 📝 Edit 🛛 💇 Rename 🗍 📖 Audi	it 🛛 🍒 Tools 👻
Report	
Category: Parcel Reports	
Name: Simple List	t Options
Report Population	
Population: All Records Pop. 0	ptions
Spec. Pop.: Ad Valorem+Special Acts	
Apply Advanced Query to Population	
Advanced Query	
Sort Index: Parcel #	
Destination: Screen	
Number of Copies: 1	argins/Fonts
Current Printer: \\ramona\SAVIN131 Printer:	nter Settings
Show Sample Penorts	
Run Report	Close

3. Click the Advanced Query button. The Advanced Query dialog appears.

An advanced query is comprised of any number of filters, each filter having its own set of conditions Filters Conditions Report Data must match: ALL filters Filter must match: ALL Add Toggle Enabled State Delete Add Enabled Filter Line Filter Line Filter Line Filter Line Filter Line Filter Line	LLL conditions	Dele alue Type
ilters Conditions Report Data must match: ALL filters Add Toggle Enabled State Delete Enabled Filter Line Field Name	ALL conditions	Dele alue Type
Add Toggle Enabled State Delete Add Enabled Filter must match: ALL	ALL conditions	alue Type
Add Toggle Enabled State Delete Add Edit Enabled Filter Line Field Name	Operator Field Va	Dele alue Type
Enabled Filter Line Field Name	Operator Field Va	alue Type
ent query description:		
ne		
Current query description:		
ne		
ne		

4. Report Data Must Match defaults to ALL Filters. We will keep this default. Click the Add button in the Filters pane. Select ParcelReadOnly as the Table; select WinTotalBillWIntrstBalance(totalbill_left_1) as the Field, and leave the Operator set to Equals. Leave the Value set to 0.00.

Edit Filter Co	ondition				×
Table: Field: Operator:	ParcelF WinTo = (Equ	Readonly talBillWIntrstBalance (totalbill_left_1) ials)	• •	Search for a field Select a Field from your Report Favorites	
Compare • Value	To		0.00		
O Anoth	er field	ad_voloreum_admin_fee	~		
OPromp	ot For Va	lue			
				OK Cance	

5. Click Ok. We now have our first condition for this filter.

Advanced Query 关 Clear Query 🔚 Save Query To DB 🔚 Load Query From DB 📓 Delete Query From DB 🛙 🖏 Export Queries To File 🗮 Import	X t Queries From File
Information	
An advanced query is comprised of any number of filters, each filter having its own set of conditions.	
Filters Conditions for filter 'Line 1'	
Report Data must match: ALL filters Filter must match: ALL conditions	
Add Toggle Enabled State Delete Add Edit	Delete
Enabled Filter Line Field Name Operator Field Value	Туре
Yes Line 1 WinTotalBillWIntrstBalance (= 0	Value
Current query description:	
Filter Name Condition(s)	~
Line 1 WinTotalBillWIntrstBalance (ParcelReadonly.totalbill_left_1) = 0	
	\sim
	Close

6. Click the Add button in the Conditions pane. Select ParcelReadOnly as the Table and select SumTotalBillWIntrstBalance(totalbill_left_0) as the Field.

Edit Filter Co	ondition				×
Table: Field:	ParcelF SumTo	Readonly talBillWIntrstBalance (totalbill_left_0)	• •	Search for a field Select a Field from your Report Favorites	
Operator:	= (Equ	als)	-		
Compare	То				
Value			0.00		
O Anoth	er field	ad_voloreum_admin_fee	-		
O Promp	t For Va	lue			
				ОК	Cancel

7. Change the Operator to Greater Than, and leave the Value set to 0.00.

Edit Filter Co	ndition			×
Table:	ParcelReadonly	•	Search for a field	
Field:	SumTotalBillWIntrstBalance (totalbill_left_0)	-	Select a Field from your Report Favorites	
Operator:	> (Greater Than)	•		
Compare	То			
Value		0.00		
O Anothe	er field ad_voloreum_admin_fee	-		
O Promp	t For Value			
			OK Cancel	

8. Click Ok. We have the second (and final) condition for this filter.

Advanced Query		×
😫 Clear Query 🛛 🔚 Save Query To DB 🛛 🚦 Load Query From	DB 📓 Delete Query From DB 🛛 🖏 Export Queries To File 👫 Import Q	ueries From File
Information		
An advanced query is comprised of any number of filters, each	filter having its own set of conditions.	
Filters	Conditions for filter 'Line 1'	
Report Data must match: ALL filters	Filter must match: ALL conditions	
Add Toggle Enabled State Delete	Add Edit	Delete
Enabled Filter Line	Field Name Operator Field Value	Туре
Yes Line 1	WinTotalBillWIntrstBalance (= 0	Value
	SumTotalBillWIntrstBalance (> 0	Value
Current query description:		
Filter Name Condition(s)		
Line 1 WinTotalBillWIntrstBalance (ParcelR SumTotalBillWIntrstBalance (Parcel	Readonly.totalbill_left_1) = 0 AND Readonly.totalbill_left_0) > 0	
		\sim
		Close

9. Assuming this is a query we will want to run from time to time, our best option is to save it. Click the Save Query to DB button at the top.

dvanced Query						>
🔀 Clear Query 📗	Save Query To DB	ad Query From Di	B 📓 Delete Query F	rom DB 🛛 🔤 Export	t Queries To File 🛛 🙀 Im	port Queries From File
Information	N					
An advanced quer	y is comprised of any number	of filters, each fil	ter having its own set	of conditions.		
Filters			Conditions for filte	er 'Line 1'		
Report Data must	match: ALL filters	•	Filter must match:	ALL conditions	•	
Add Togg	e Enabled State	Delete	Add Edit			Delete
Enabled Filter L	ine		Field Name	Operator	Field Value	Type
Yes Line 1			WinTotalBillWIntrst	Balance (=	0	Value
			SumTotalBillWIntrs	tBalance (>	0	Value
Current query desa	ription:					
Filter Name	Condition(s)					_
Line 1	WinTotalBillWIntrstBala SumTotalBillWIntrstBa	ance (ParcelRe lance (ParcelRe	adonly.totalbill_lef eadonly.totalbill_le	ft_1) = 0 AND ft_0) > 0		
						~
						Close

10. New Query Name is the default selection. Enter the Query Name and click Ok.

Save Query To D	atabase	×
New Quer	/ Name	
Query Name:	My Query	
Override I	xisting Query]
Selected repor	t filter description:	
No Existi	ng Saved Queries	~
		\sim
		Ok Cancel

- 11. Click Ok to clear the confirmation prompt that appears.
- 12. Click Close to return to the Run Reports dialog and run the report to see the results.