RIMSS WinNet Star

Advanced Enterprise System

Custom Reports

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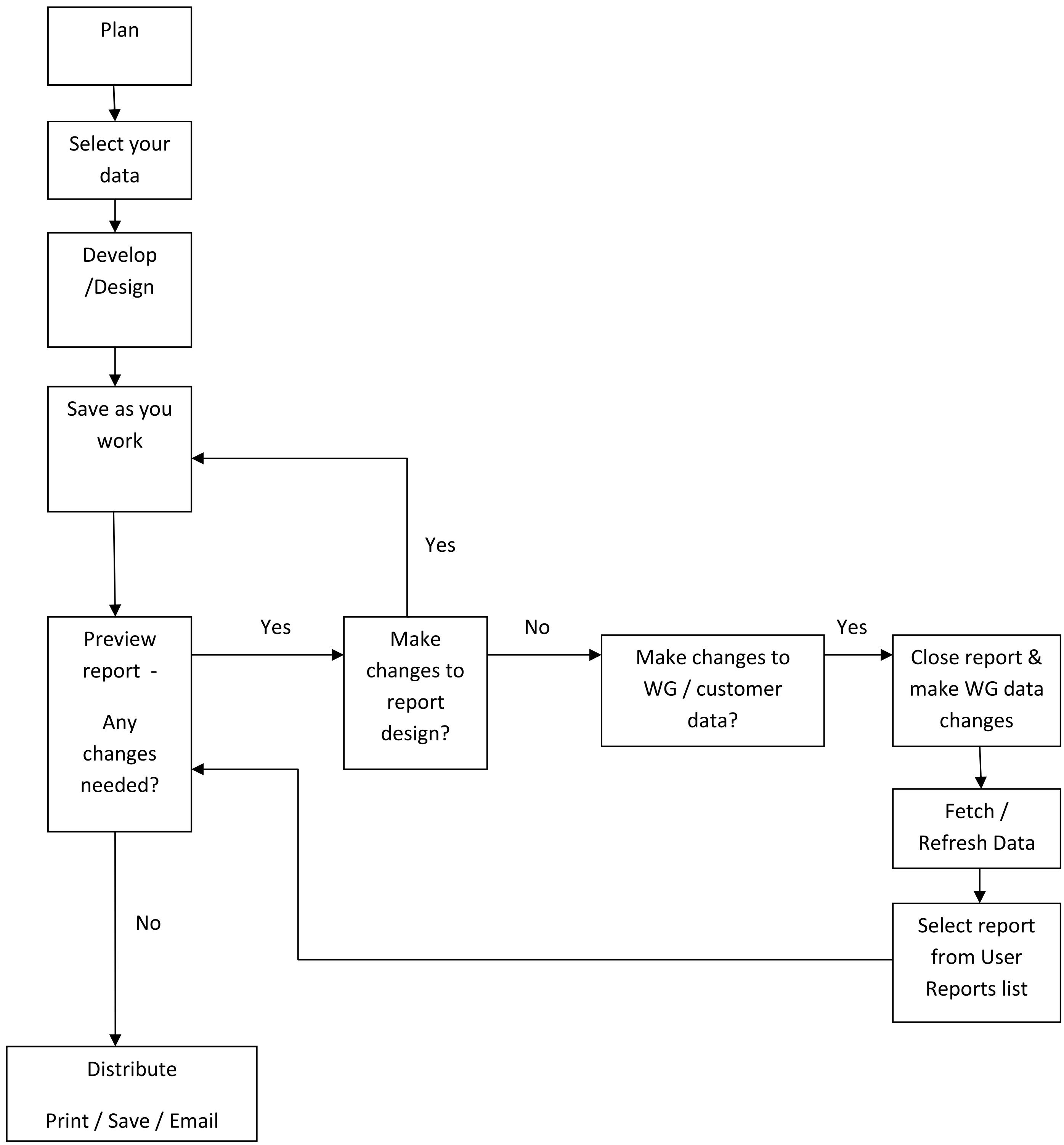
Getting Started



Why Custom Reports?

- Information is available company wide
- Reduces errors and saves time by entering data only once
- Reduces reporting time
- Formatting makes it easier to have readable information and catch inconsistencies
- Saves dollars by printing “as you go” vs printing large volumes of copies that quickly go obsolete
- Improves communication between departments

Where can you do custom reporting?

- WG module
- CRM – Customer Module

What types of reports?

Internal Users

- **Administration** – Track Trends
- **Service** – Component Listing, inspection forms, delivery days, WG identifier signage
- **Accounting** - Calculate margins, reconciliations (inventory-internal & with financing companies), track delayed incentives to make sure we are getting all $s, etc.
- **Sales –** File labels, WG Sales Packet Labels, customer correspondence, inventory available for sale, Mfg. Status, commission
- **Labels -** Mailings, Files, Packets
- **Warranty** – Claim forms, Component Serial #’s
- **Parts** – Status report to order parts timely for PDI work –reduces PDI days, freight charges on “on-time” parts

External Users

State Required Forms

- Title Applications
- MSO
- License Approvals
- Titling Errors
- “As Is” no Warranty

Customer Required Forms

- School Districts – As delivered

How?

Plan Information

What will my report do?

- View/List/report Information
- Calculate
- Fill or Complete preprinted forms

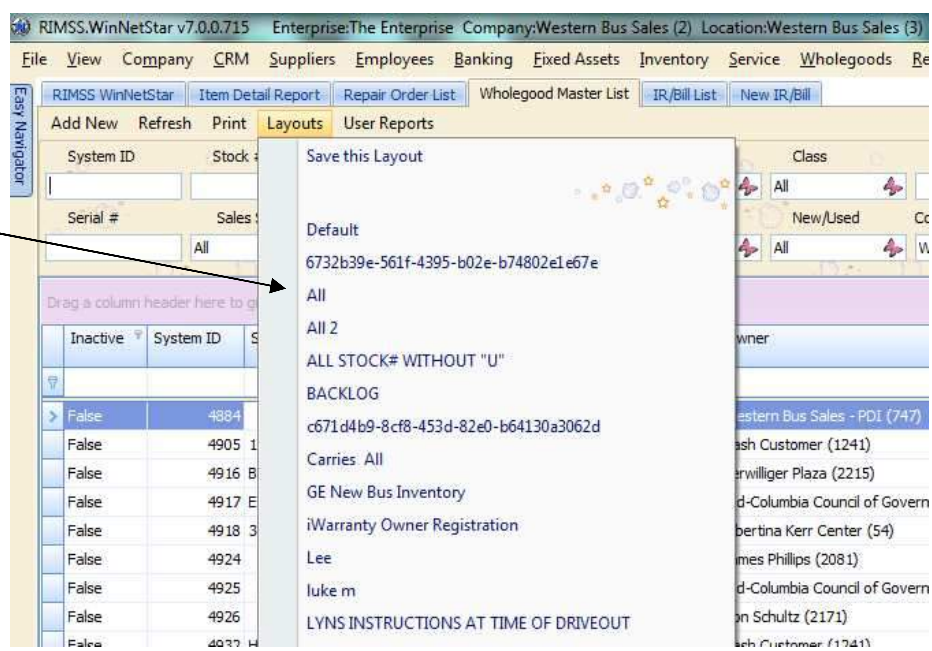
What Format?

- Portrait or Landscape
- Margins
- Cover Page / Titles
- Grand Totals / Footers

What is my report name?

Tip: Have a consistent naming structure – it will help locate your reports. i.e. ,group by department or user and what the report is doing.

Select Data



Select a Layout

Tip: Create and save a "Report Layout" specific to reports (i.e., All – this includes all fields available in WG). With all data selected you don't have to worry as much about invalid or missing data.

Select Fetch data

If data is not "fetched"/selected, your report will be blank.

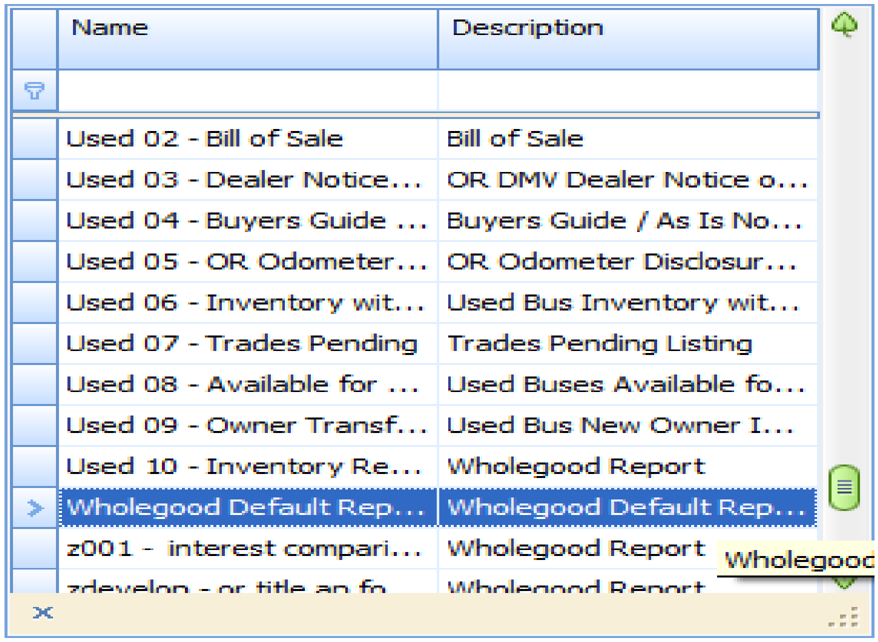
TIP: Filter your data using Report property filters or setting Parameter fields (see appendix for details).

Develop Report

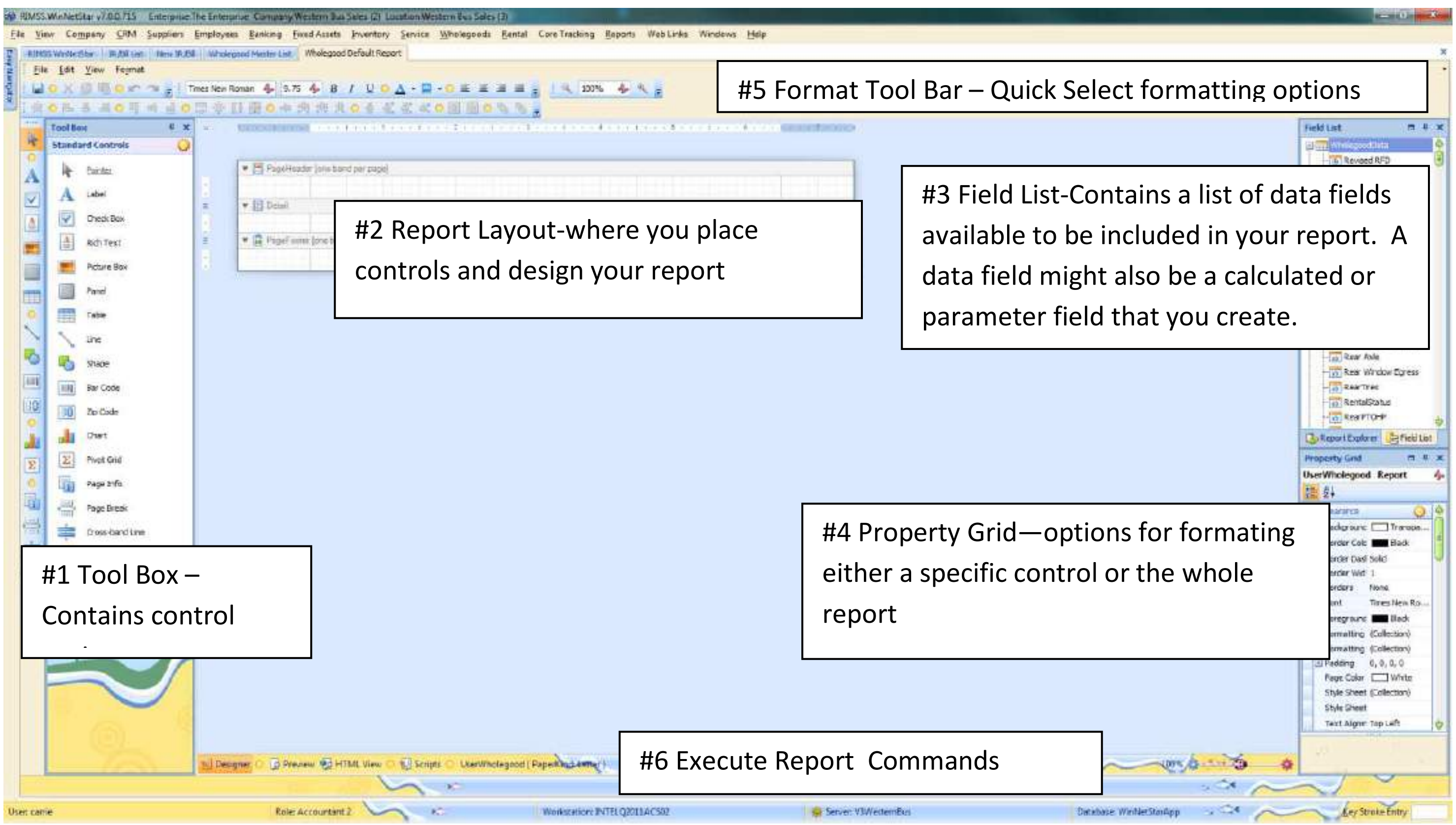
Select “WG Default Report” from the User reports from WG Master List.

This is a blank template where you will develop your report.

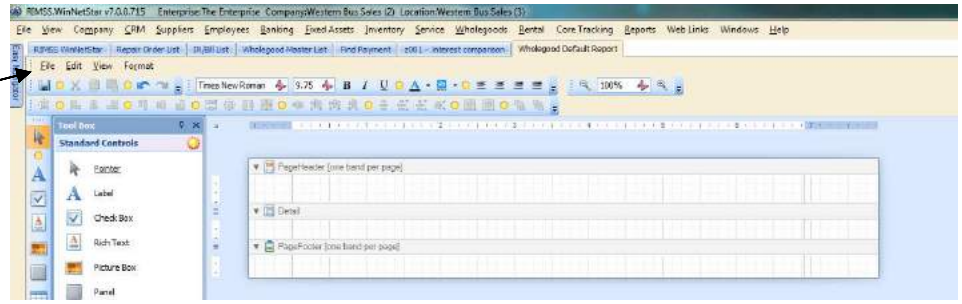
You will place controls/fields within the template to get data to show on your printable report.   The Report development screen has 6 areas to familiarize yourself with to define your report.



Name	Description
Used 02 - Bill of Sale	Bill of Sale
Used 03 - Dealer Notice...	OR DMV Dealer Notice o...
Used 04 - Buyers Guide ...	Buyers Guide / As Is No...
Used 05 - OR Odometer...	OR Odometer Disclosur...
Used 06 - Inventory wit...	Used Bus Inventory wit...
Used 07 - Trades Pending	Trades Pending Listing
Used 08 - Available for ...	Used Buses Available fo...
Used 09 - Owner Transf...	Used Bus New Owner I...
Used 10 - Inventory Re...	Wholegood Report
Wholegood Default Rep...	Wholegood Default Rep...
z001 - interest compari...	Wholegood Report
zdevelop - or title an fo	Wholegood Report



TIP: Because you cannot save changes to a template, it is a good idea to name your report now. Hopefully you have decided on a standard naming convention (as mentioned earlier).



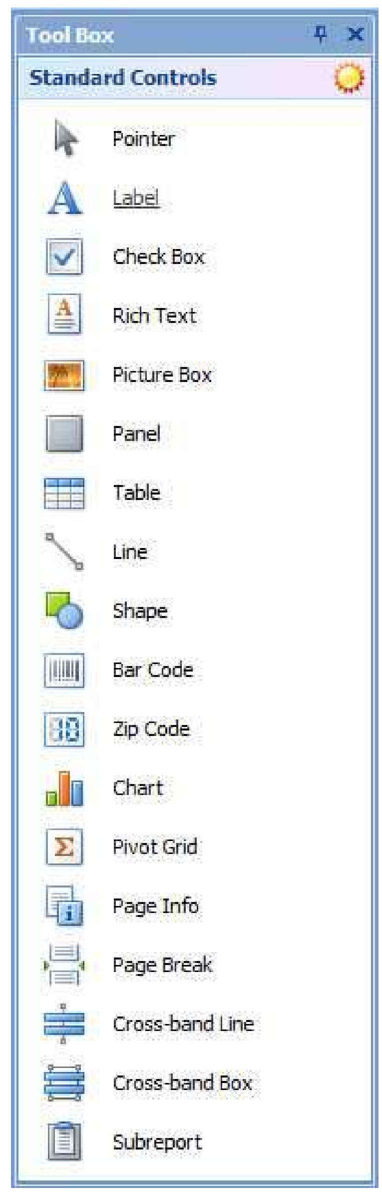
Save your report by selecting file then save as.

When the User Reports attributes window appears, enter the report name and type in a description.

Select OK.

TIP: The first time you save a report the system returns you to the WG Master list report. Select Refresh and then look for your report in the User Report List.

#1 Tool Box Section



Contains the controls that you place in your report to provide different actions or appearance. Some are just for "looks" like lines and shapes. Some determine what type of data is displayed ie. A "picture box" allows you to place a picture in your report.

Controls are either Unbound or Bound. Unbound data is static usually like a column label, picture, or report name. Bound data is dependent upon a data source or (field from the WG record or calculation). Refer to Data Binding Section for instructions on how to bind data. Refer to Formatting Section to learn how to change appearance of a control

Most Commonly Used Controls

Label – Use this to display information. It can be either "bound" or "unbound" to a data field. Formulas can be applied to this type of box. It is also the default control type used when drag and drop method for adding a field to the report.

Check Box – Use for a check box in a form. It can either be an open box or a formula can be applied to this to automatically check the box based upon criteria.

Rich Text – Use this to display information. It can be either "bound" or "unbound" to a data field. Use for static text like a column label or report name.

Picture Box – Display a picture or graphic. It is static.

Table – Cells can be bound to data fields to auto fill or unbound to just display a fillable grid.   Formats data into a table format.

Line – Place a dividing line either vertically or horizontally in your report.

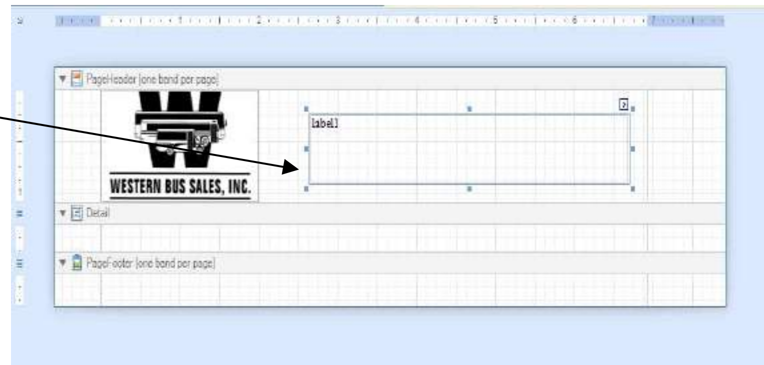
Shape – Place a predefined shape into your report. It is static.

Page Info – Places a control which displays page # or Date/time stamp, or user name.

Page Break – Manually place a page break in your report.

To insert a control from the tool box: Click on the control name. Then move your mouse pointer over the report layout section and draw an area where you want your control to reside.

Where you place these controls within a "report band section" determines how your data is displayed.



#2 Report Layout Section

This is where you place controls which determine what data is included in your report and what your report will look like. By default your report has a page header, footer, and a detail section. You can add sections/“bands” to add grouping levels and summary functions.

What happens within each section:

Report Headers – Places any information on this page at the beginning of the report. It prints once at the beginning of the report.

Page headers - Is where you usually put data like column labels, report name (if not on a report header), logos. The information prints on all pages at the top of the page.

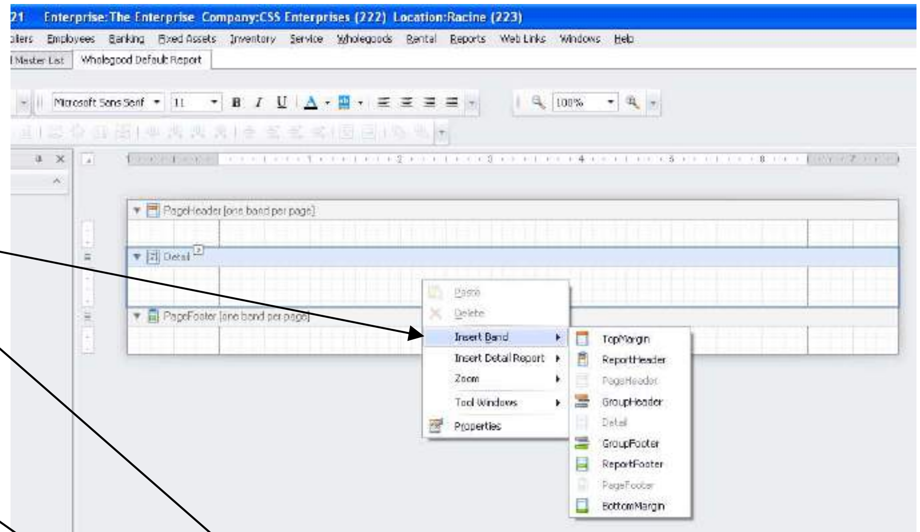
Group Headers – Print at the beginning of a group. i.e., if you want a report grouped by the customer’s state, then in this section you would put a control bound to the “business state” field. (refer to the Grouping Data to Format Your Report in the appendix for details.)

Detail –Included data on each record selected.   Prints detail of the report related to each selected record. If you have fields that bound to a formula the results are based on each record.

Group Footers – Information is included at the bottom of the detail in a group. Prints at the end of a group of data. Calculations can total by group .

Page footers – Places & prints information on the bottom each page. Calculations will print at bottom of page.

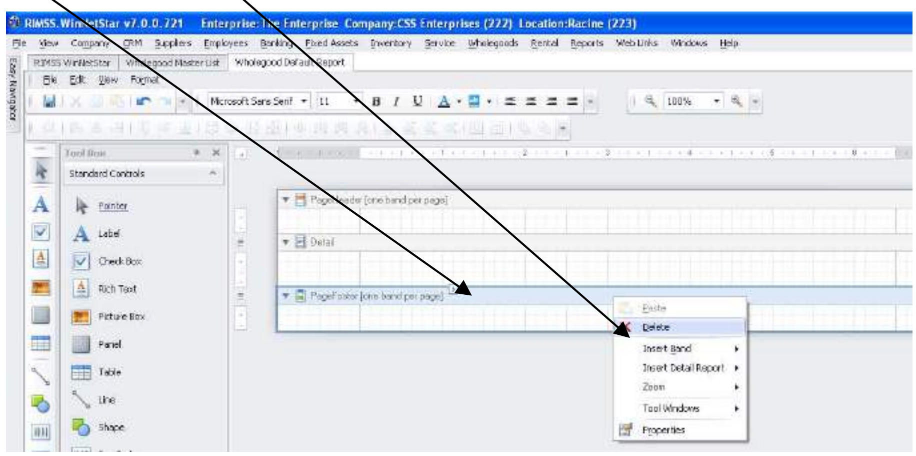
Report Footer – Places & prints information once at the end of the report. Calculations will print at end of report.



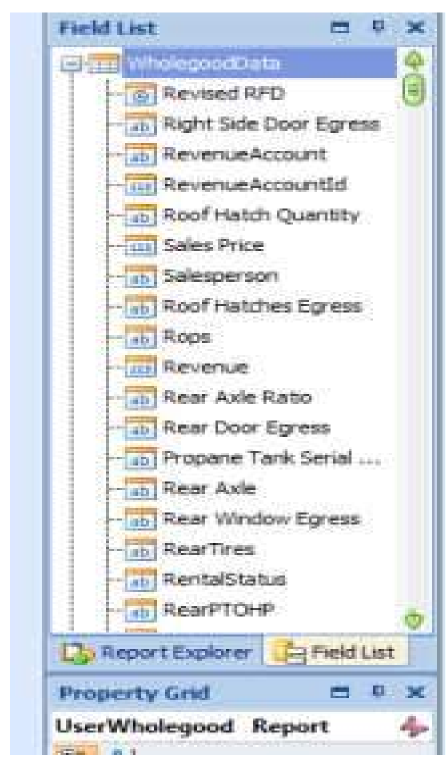
To add a section, place mouse over report section and right click. Select Insert Band, and select the type of section you are going to insert.

To remove a section, select band, right click mouse and select delete.

Increase the size of a section, press and hold the left mouse key over the top of the Band at the bottom of the section you want to increase the size of and drag it downward. (i.e., in the example to the left to increase the page header size you click & hold at the top of the "detail band" and drag the band downward.)



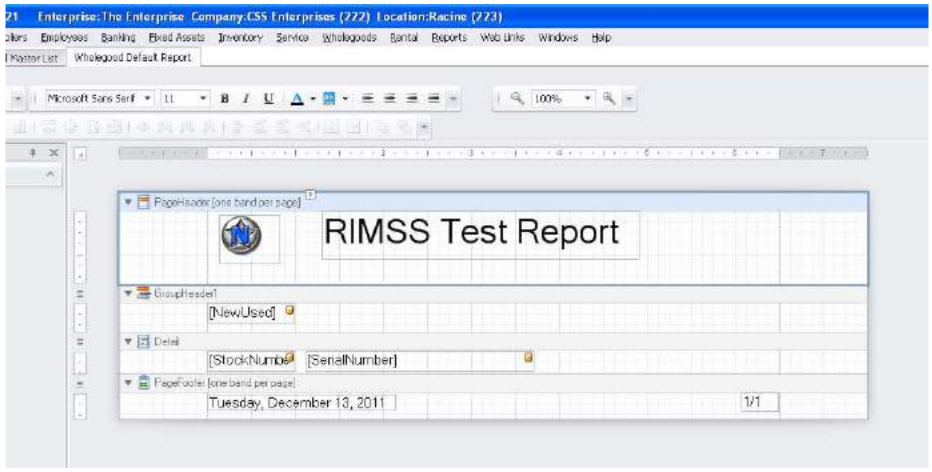
#3 Field List Section



Contains all the available **WG fields** to choose from that can be included in your report. This section is also where you create field that **calculate** as well as creating any **Parameter** fields to set runtime filters on your data or to enter data that is not saved within the wholegood record.

Tip: The icon next to the field name indicates the type of data contained in the field. Alpha/text, date/time, numeric, check box (or yes/no) , or calculated.

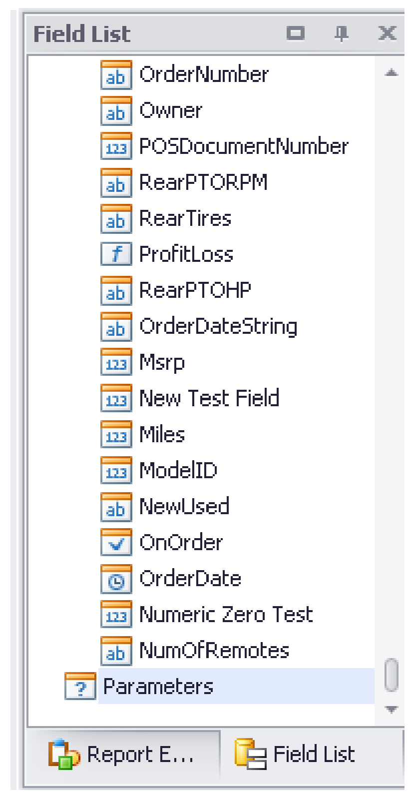
To place a Bound field into your report from the field list-- left click and hold down the mouse pointer on top of the field you want to include. Drag and drop the field into a section on the report layout area.



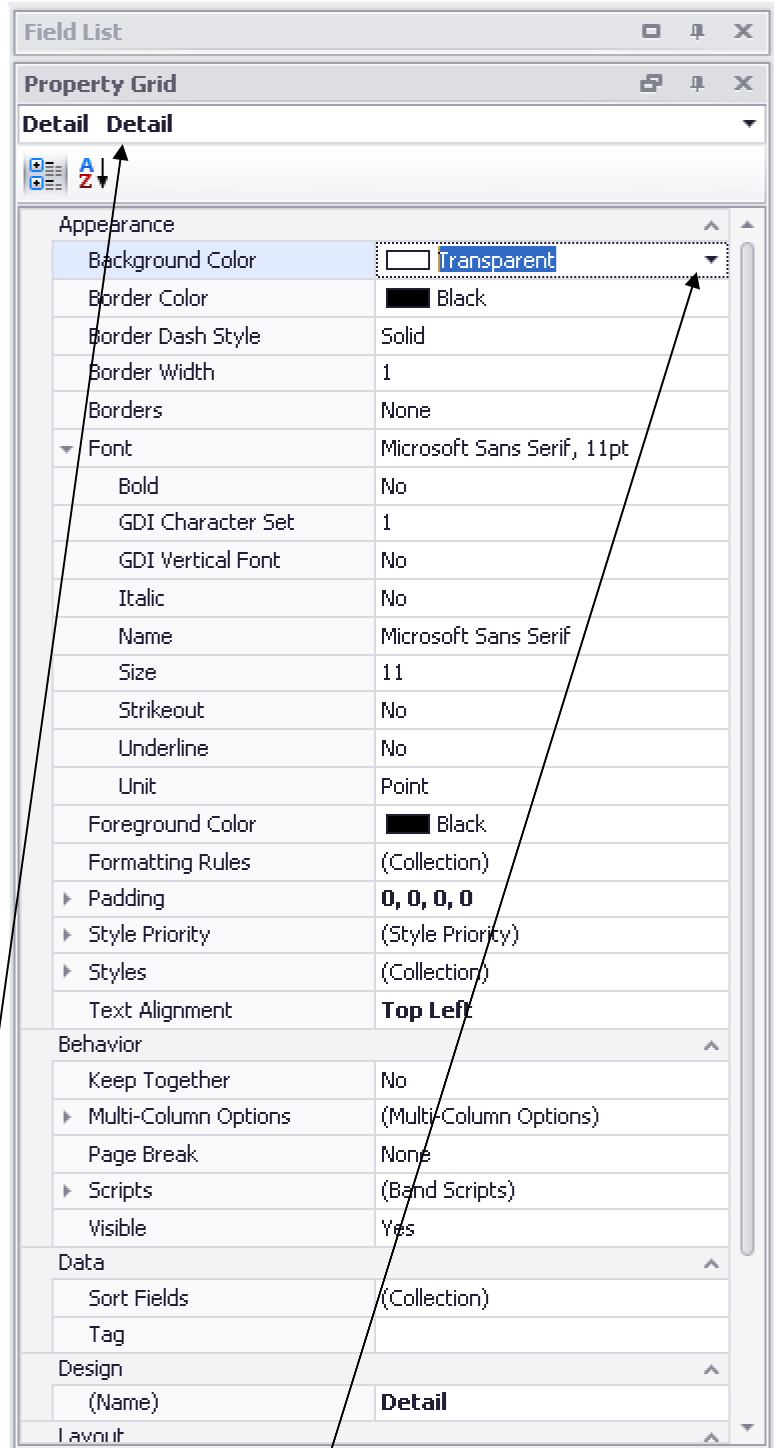
Calculated Fields –are fields that contain formulas. Formulas are written much like they are done in Excel. The difference is, instead of referencing "cell references" in the formula you enter "field names". Calculations can be performed on numeric, text, check box, and date/time type fields. Calculations are performed automatically when the report is run and if the calculated field is included in the report, it will be displayed. (Refer to Appendix for instructions on creating Calculated fields.)

TIP: Field names within a formula must have brackets [*fieldname*] before and after the field name or the program doesn't recognize it as a field to perform the calculation on. The field names within a formula are case and space sensitive.

Parameters (located at bottom of field list) are fields where your are prompted to enter data prior to the preview of the report. You can set "runtime" filters or enter data to be displayed on the report but is not saved in the WG record, i.e., WG that sold between 1/1/2011 and 12/31/2011. When you fetched/selected your data, maybe you have all WG's selected. However, you might only want to see sales during a certain period and you might want to change your selection without leaving the report and filtering your data and then reentering the report to run it. Using parameters allows you to do this. (Refer to Appendix Section on creating Parameters.)



#4 Property Grid



Works hand in hand with the formatting tool bar located at the top of the Report Design window. However it is much more detailed and relates to each individual object of your report (the report, the headers, the column labels, the data, etc.). For example: you may want to change the font color of your column labels or develop mailing labels. To do this you need to select properties in those individual report objects. (See Formatting Beyond the Property Grid in the appendix.)

UserWholegood Report changes properties for the whole report such as margins, borders paper sizes, default printers.

Header Bands (either Page or Group) changes properties for the header. Set default font sizes, background colors, borders.

Detail changes properties for the detail section of your report. Set fonts, sorting, columns or borders.

Footer (either Report, Page or Group) changes properties for each of those areas such as fonts, colors, etc.

Label changes properties for each individual field you have entered onto your report. Set colors, fonts, borders, text wrapping, placement on the page, etc.

TIP: You can identify what object properties you are effecting by looking in the Description box at the top of the property grid window. As you select different objects in your report, the Property Grid Description changes.

To change a property and to see what options are available, select the for each property you are changing.

TIP: Guideline for changing margins, padding, and locations is the value of 100 = 1”.

TIP: To format your document to print Labels - change the # of columns in the Multi-Column Options area.

CAUTION: Be careful which area you set your properties. Some settings may override settings in other bands, i.e., if you set a default font in the Report Band properties, they can override any fonts in other areas.

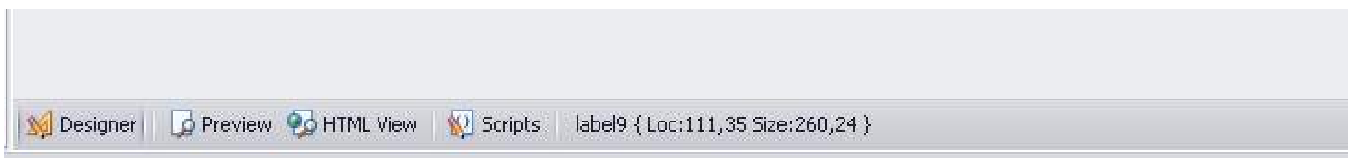
#5 Formatting Tool Bar

The tool bar has basic formatting options with “Quick” formatting icons but only includes the basics when it comes to formatting, i.e., text alignment, font color, text type, font face and size.

To change properties using the Formatting Tool Bar:

Select the object (i.e., a column label) and then select any of the icons on the tool bar. The changes will be seen immediately.

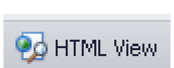
#6 Execute Report Commands Tool Bar



This tool bar is located at the bottom of the Report Design window. Selecting the items will do the following:

By default when you enter a report you are in Designer mode. However if you have previewed your report and then need to make changes select this to return to the Report Designer window.

Processes your report and allows you to view it on screen prior to printing a “hard copy”. You still have the option of changing some formatting options prior to printing or saving the report to disk.

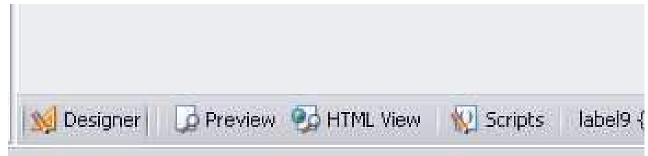


Processes your report and gives you a on screen preview but there is no option to print a hard copy. You can only save a copy to disk.

Provides an area for further advanced programing options.

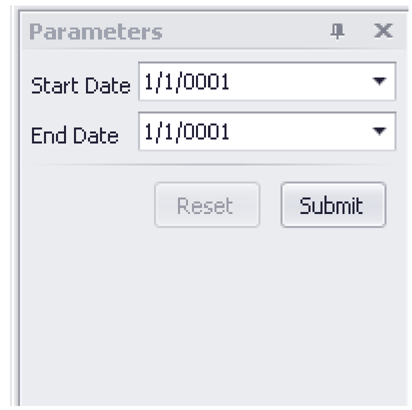
Print/Distributing the Report

From the report design window

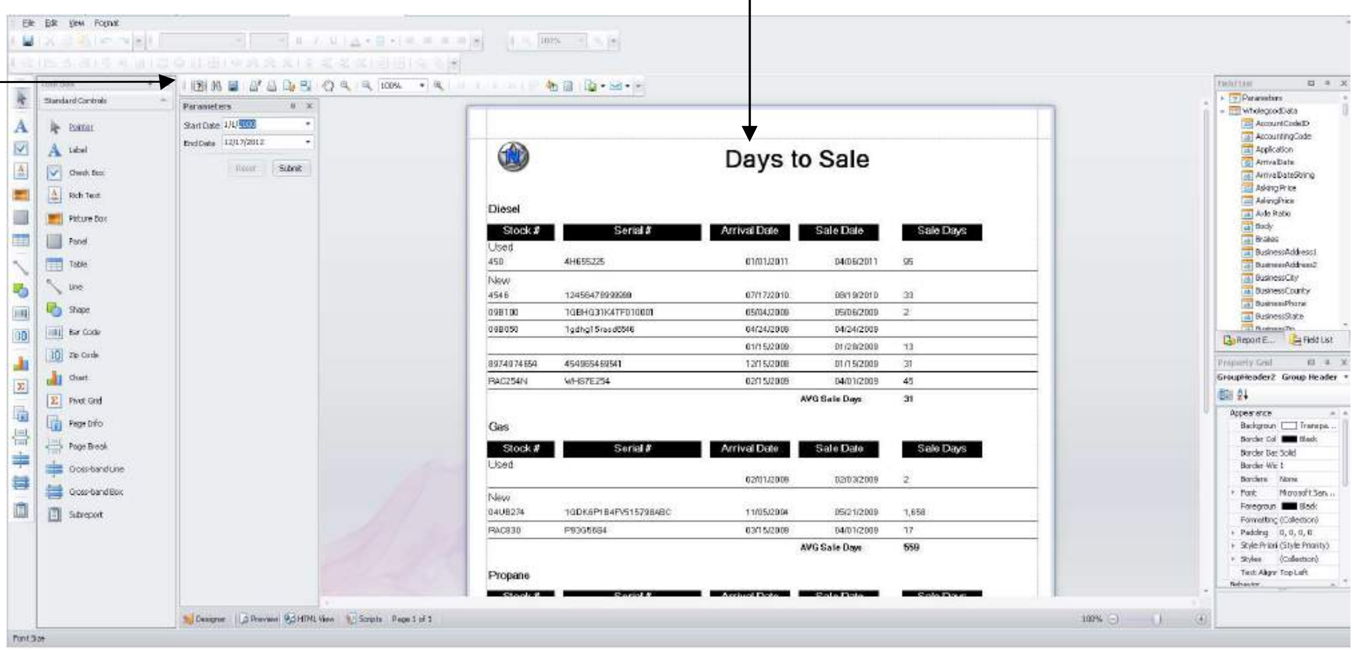


Select Preview from the Execute Report Command Tool Bar

Enter any parameters if requested.



A preview of the report appears



Select any additional formatting or distribution options from the tool bar.

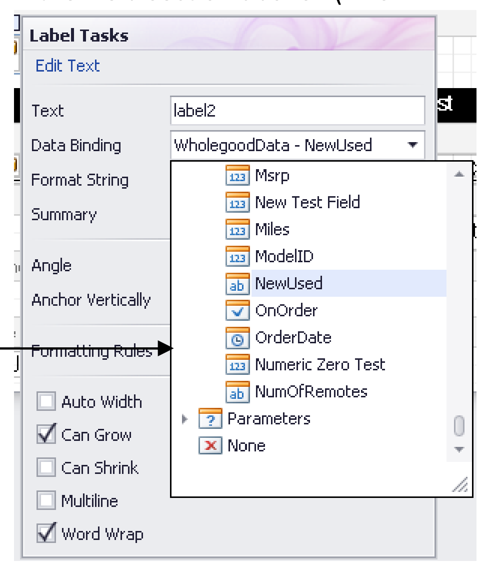
Appendix

Data Binding

Is simply the process of binding/joining a field/control in the report to data stored in your WG or Customer record. For example, if you want to have a list of stock #'s and manufacturers, you would have two "label" type controls placed in the report detail section. However, in order to have the report print with any data, the control must be bound to a data source kept in the WG record.

How to bind data:

Drag and drop a field from the field list to the report design area as noted in the Field section above. (This method automatically binds the control to your data.)

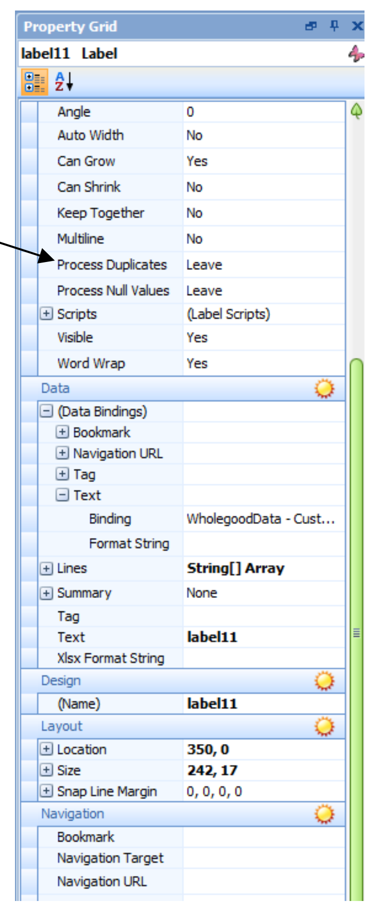


Or

Enter the properties of a control and select a field from the drop down listing in the Data Binding field. (To Enter the properties of a control, select the control and use the property grid or see instructions below "Formatting Beyond the Property Grid".)

Or

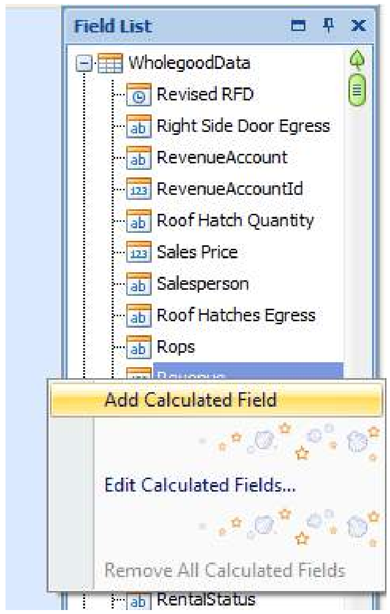
Select the Control on the report design and edit the binding property in the Property Grid window.

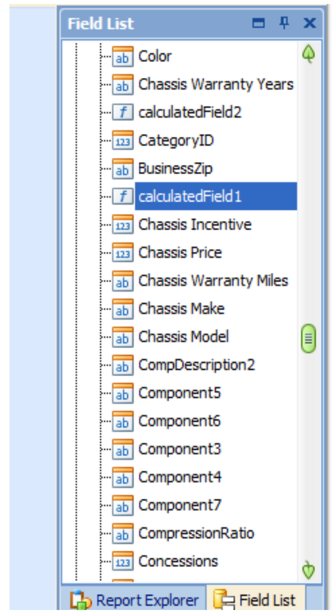


Create a Calculated Field

Right click the mouse over the “Field List Section” (anywhere within the field list is OK).

Select “add calculated field”. NOTICE: a new field named “CalculatedField1” is added to the field list once you selected “add calculated field”.





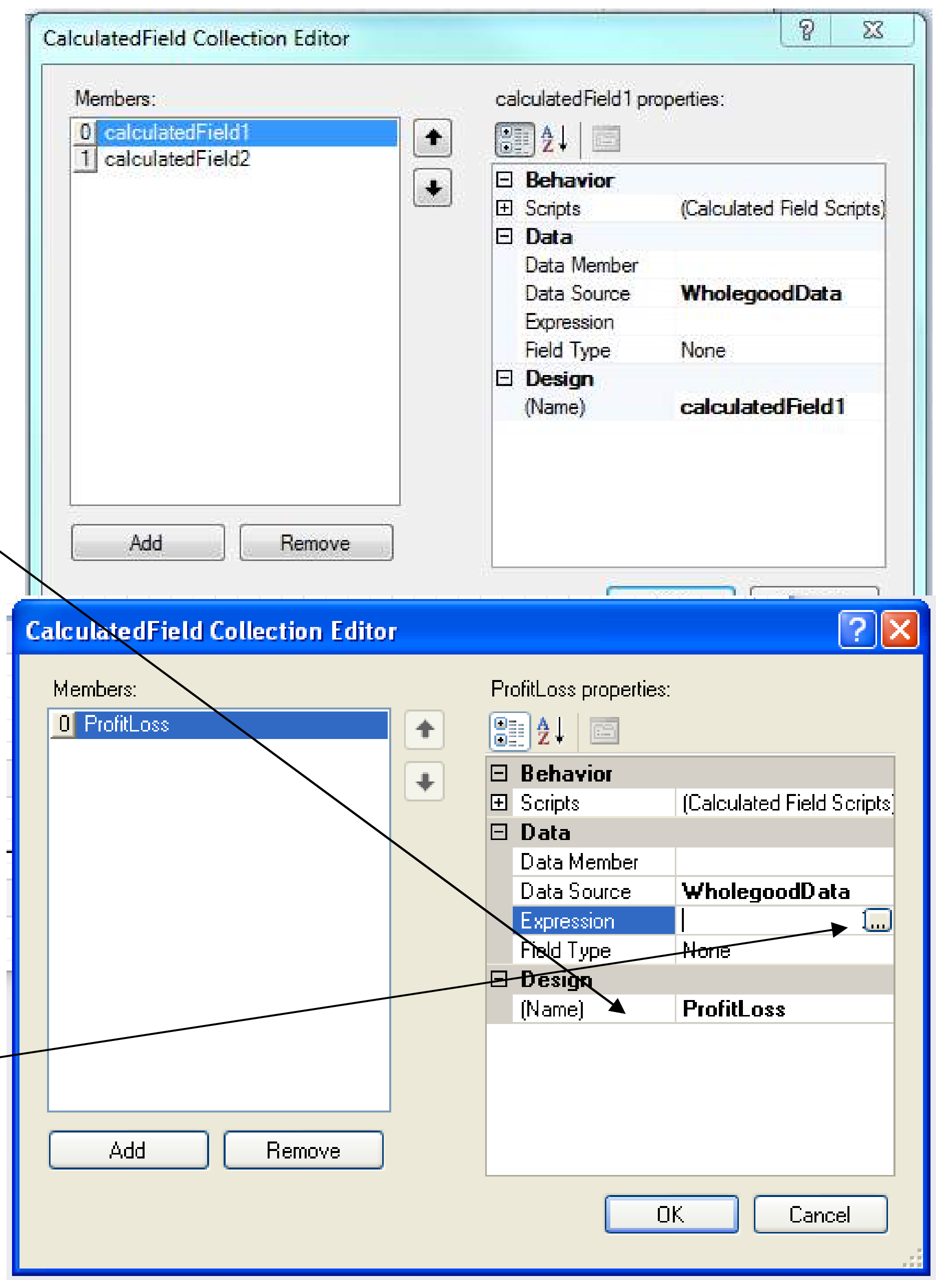
While the new field is highlighted, right click the mouse and select “edit calculated field” to get the Calculated Field Collection Editor window to appear .

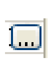
The left side of this window lists all calculated fields you entered. The right side is where you customize the field and enter your formula.

Select which field you want to customize.

Rename your field by erasing the default name (calculatedfield1) and entering your new name.

TIP: Field names cannot contain spaces or special characters. So if you want to have a name with more than one word and have it be easier to read, capitalize the first letter of each word without spaces. (i.e., for a field name of “Profit/Loss” you would enter “ProfitLoss”, which is easier to read than profitloss).



Enter your Formula in the Expression field. Select to  open the Expression Editor Window.

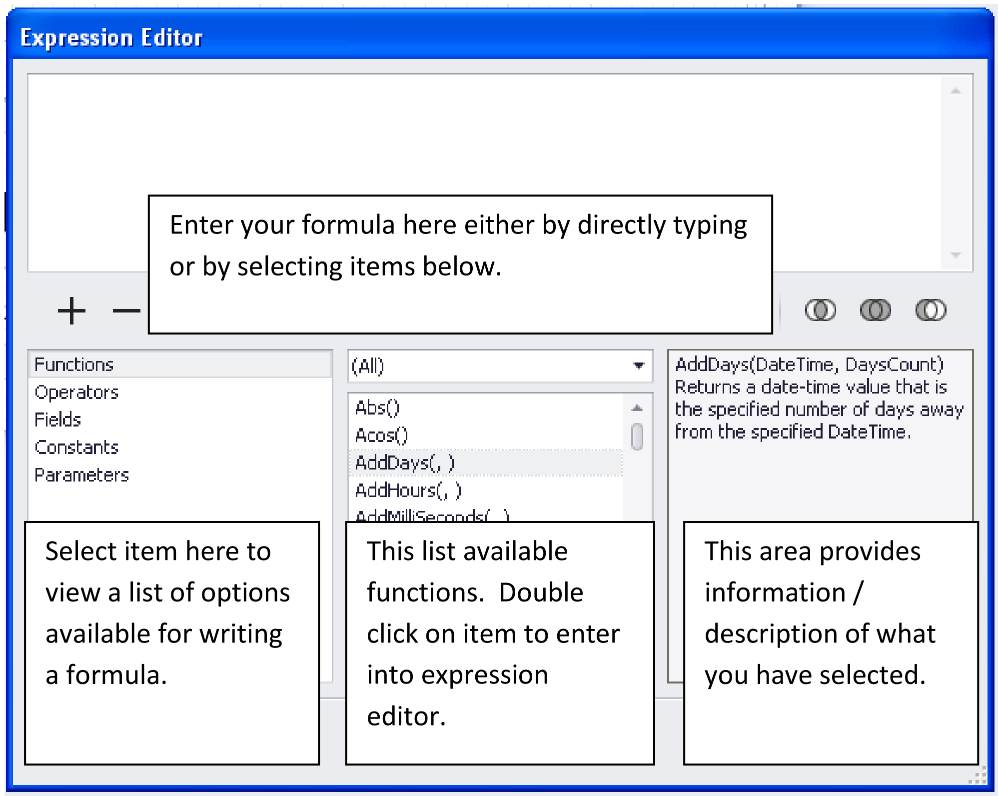
Functions preset formula outlines. Similar to Excel Functions.

Operators are what type of calculation you are performing: adding, subtracting, etc.

Fields list all available fields to perform your calculation on.

Constants list available formula options using true or false.

Parameters list any parameter fields you have created (see parameters section below).



Example:

To calculate projected profit using the following formula:

Asking Price- Cost=Profit

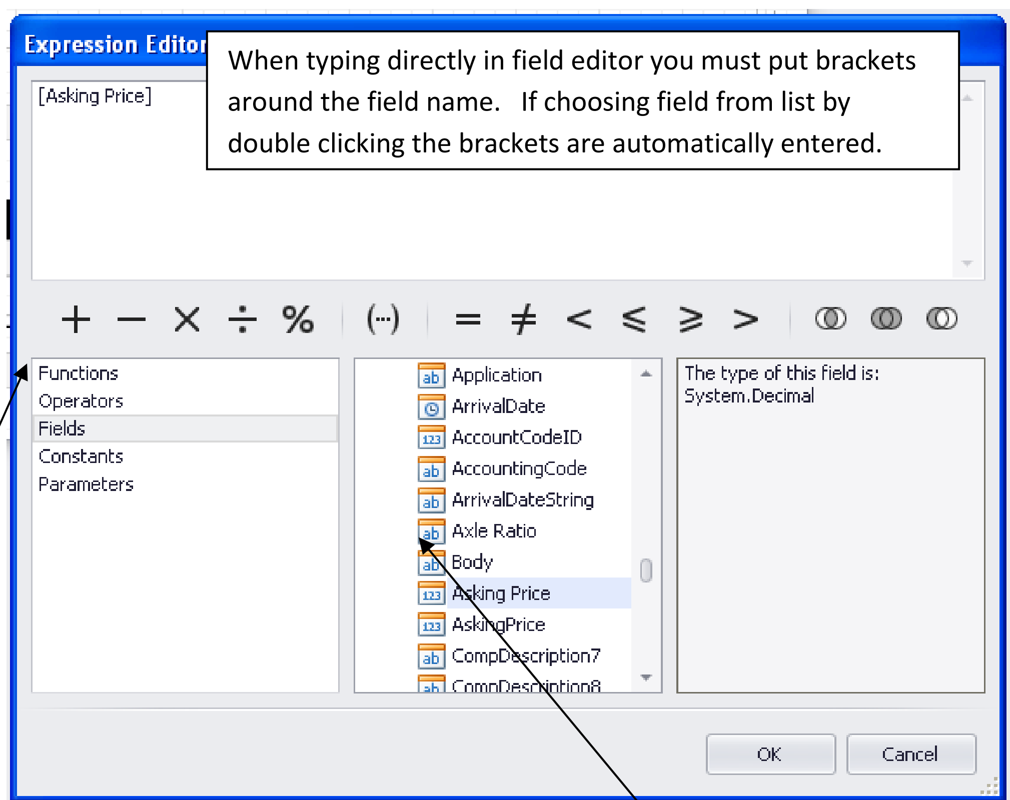
Enter the “Asking Price” Field into the expression editor by one the following methods.

Type the field name (exactly as entered in the field listing) directly in the Expression Editor, entering brackets around the name.

OR

Select fields to get a list of the available fields in the center window.

Scroll down center listing until you find the “Asking Price” field.



Double Click on the “Asking Price” field. The field is now entered in the expression editor.

Enter your Operator by

Typing a "-" using your keyboard

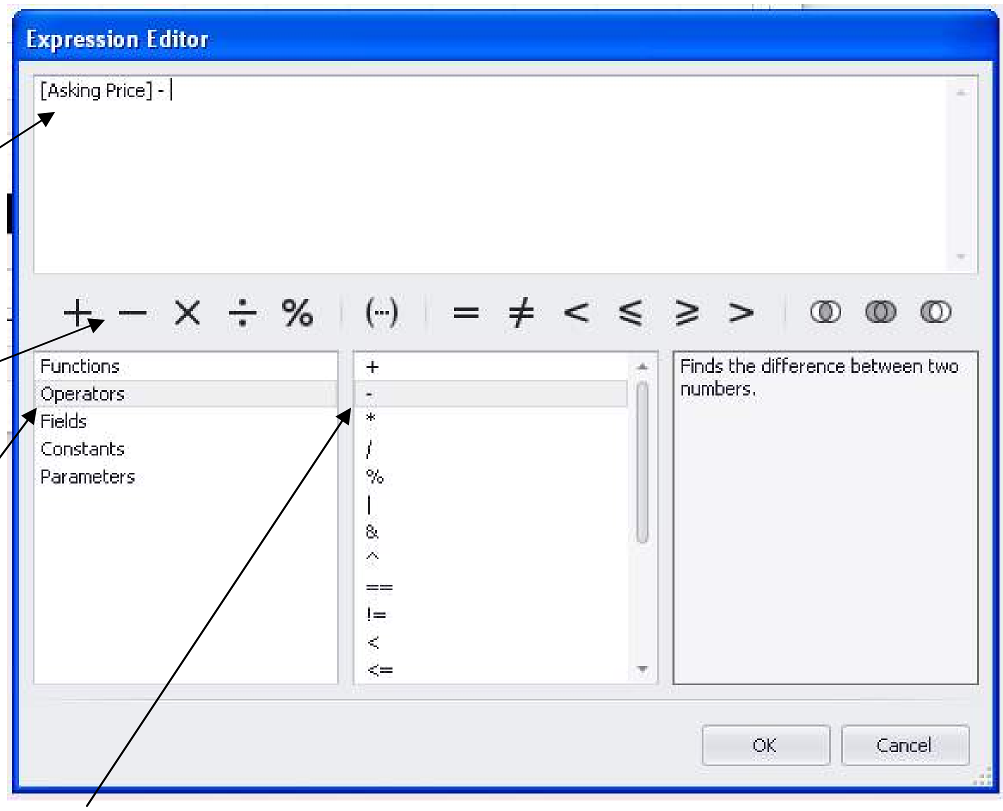
OR

Select your Operator by clicking on the "-" icon

OR

Select Operators to view possible operators.

Scroll down center listing until you find the "Asking Price" field.



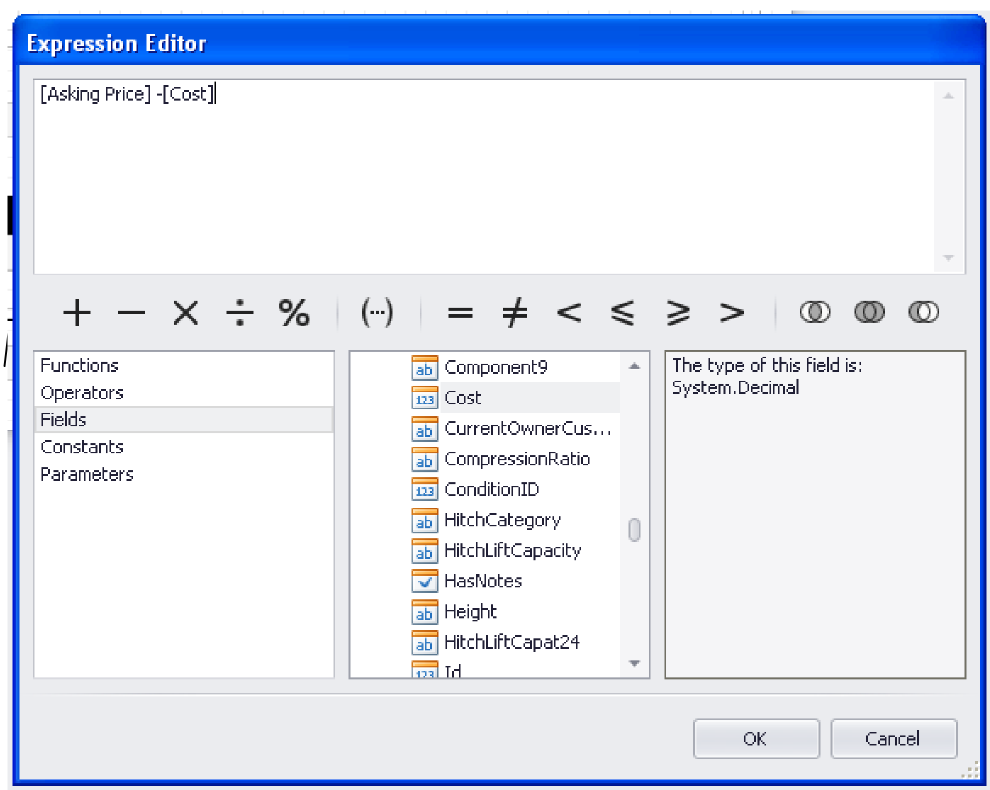
Double Click on the "Subtraction" sign. Notice how the subtraction sign is entered in the expression editor.

Enter the "Cost" field using the same method as used for the "Asking Price".

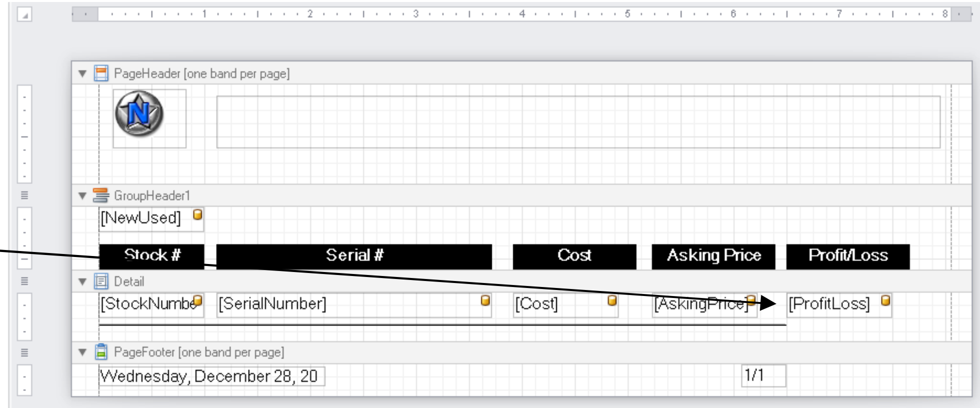
When your formula looks like the example

Select OK to return to the Calculated Field Collection Editor screen.

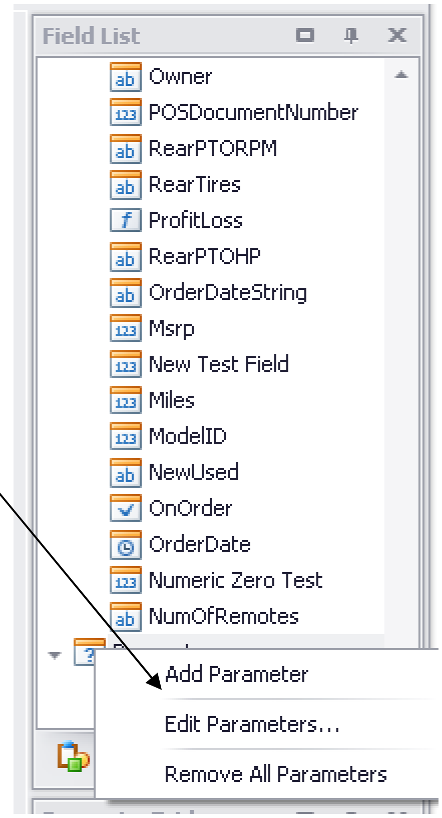
Select OK again to return to your report design.



To have that data in your report, drag and drop the newly created field from the field list to the report layout area.



Create a Parameter Field



Creating a parameter is much like creating a calculated field. However where a calculated field calculates automatically when the report is run, a parameter usually does not. Therefore once you create a parameter field, when your report runs, you are prompted for data before the report preview appears.

Right click mouse over the parameter field**.**

Select "Add Parameter" to open the Parameter Collection Editor and enter a new name for the field.

TIP: Field names cannot contain spaces or special characters. So if you want to have a name with more than one word and have it be easier to read, capitalize the first letter of each word without spaces. (i.e., for a field name of "Start Date" you would enter "StartDate", which is easier to read than startdate).

Enter a description. This is where you type the name as you want it to appear ie. Start Date (with spaces).

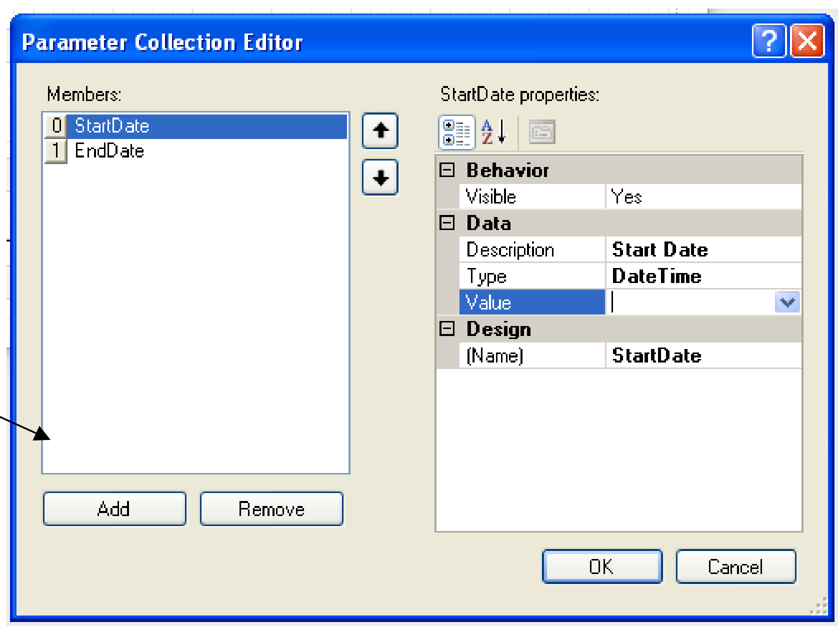
Select a data type, i.e., if date select DateTime.

TIP: A value is only entered if you want a default value that will not change at run time.

TIP: To get data that is within a range of dates you must create 2 parameter fields. Usually "Start" and "End".

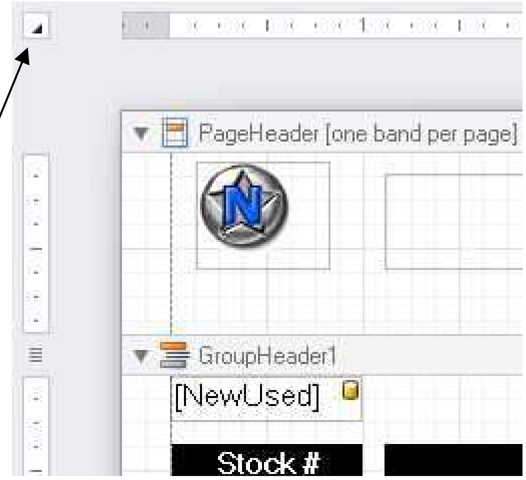
Select OK to return to the report design.

TIP: To create another parameter field without returning to the report design, select Add and repeat steps above.

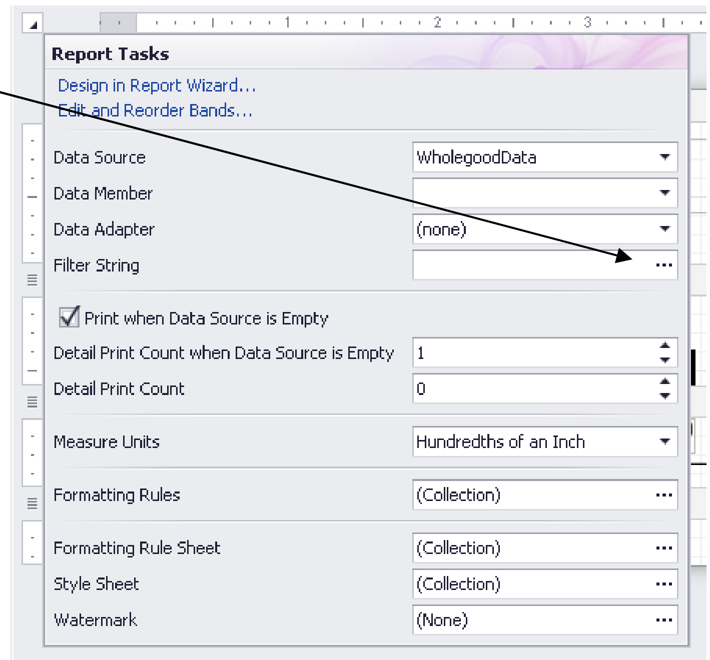


Once you return to the Report Design, you must now set a Filter in the Report Properties in order for the parameter to work.

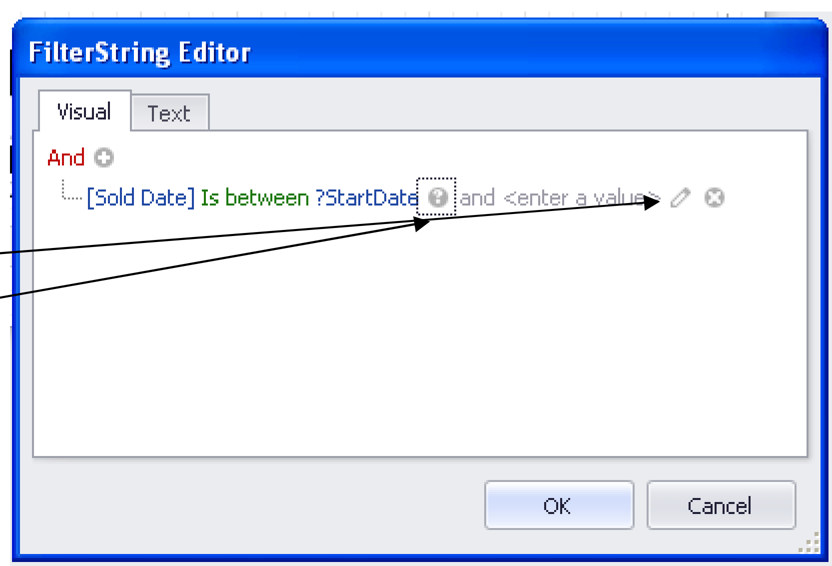
Left click on the box in the upper left had corner of your report to open the Report Tasks Window.



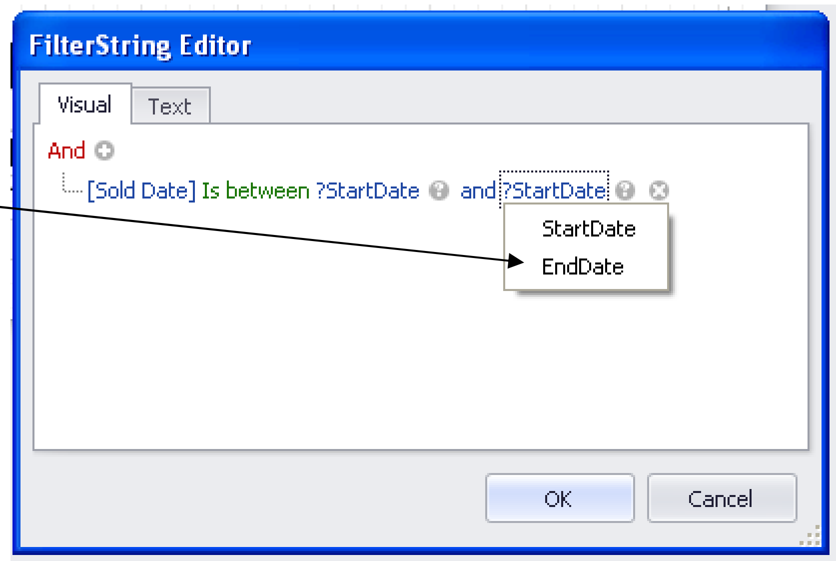
Select ··· on the filter String box to open the filter string editor.



The filter string editor works like other areas within RIMSS program. In the example shown, we are selecting WG records with sales dates between Start Date and End Date based upon our parameter fields. To connect our Sold Date field to the parameter field, Click on the next to <enter a value> until it turns to .



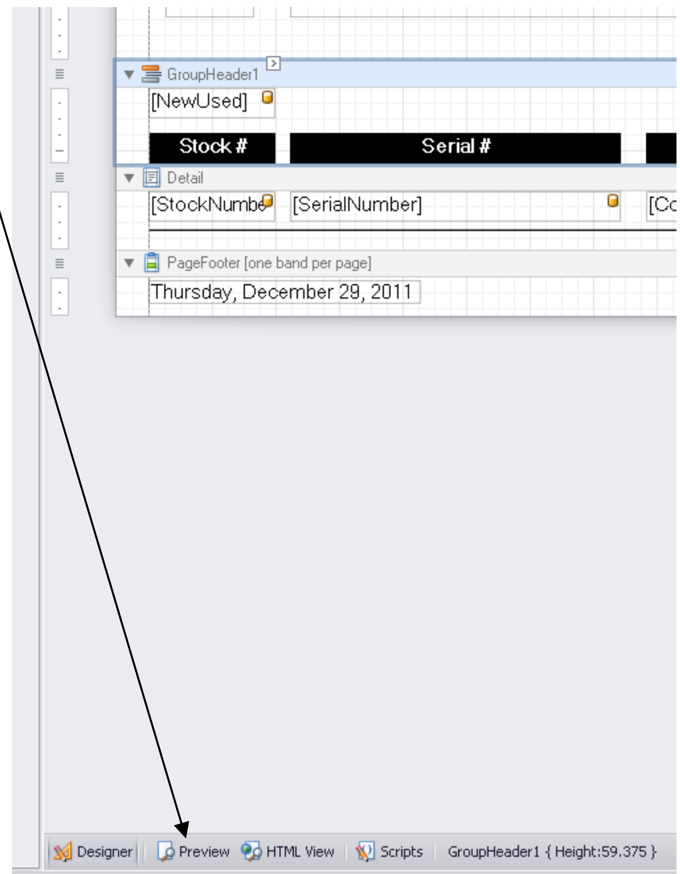
TIP: The default entry is your 1st parameter field. Click on ?fieldname to bring down a drop down listing of parameter fields to choose from **.**



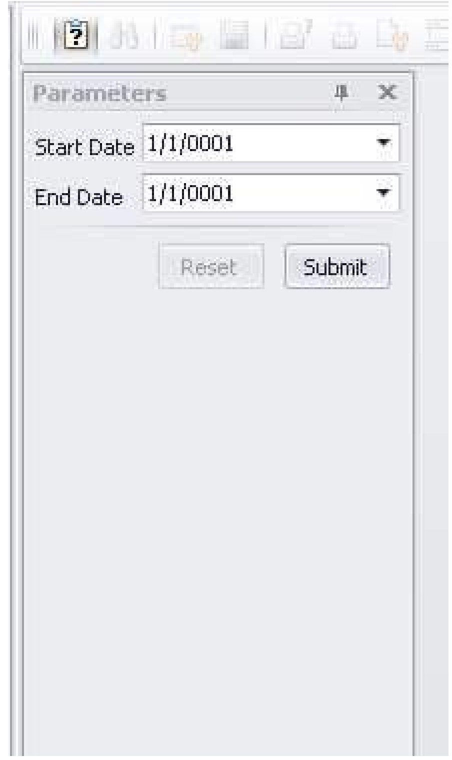
Select OK to return to the Report Tasks window.

Click inside the report Design to close the Report Tasks window.

Click on Preview from the Report Command bar at the bottom of the Report Design window.



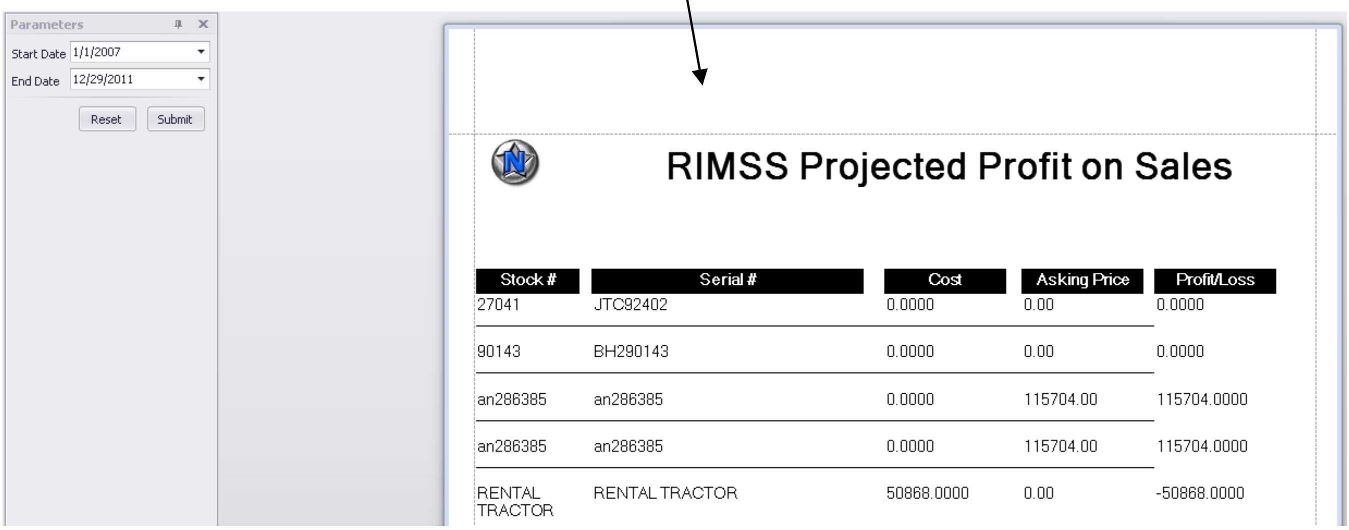
REMEMBER: Parameters are items that happen at the time you run the report. Therefore, the system will prompt you to enter the parameters. If you do not enter data when prompted, you may not get the results you are looking for. For example the picture shown is the default. If you do not have any items sold on January 1 in the year 0001 your report will be blank.



Click into the Start Date Field and change the date.

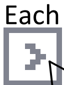
Tab or Click into the End Date Field and change the date.

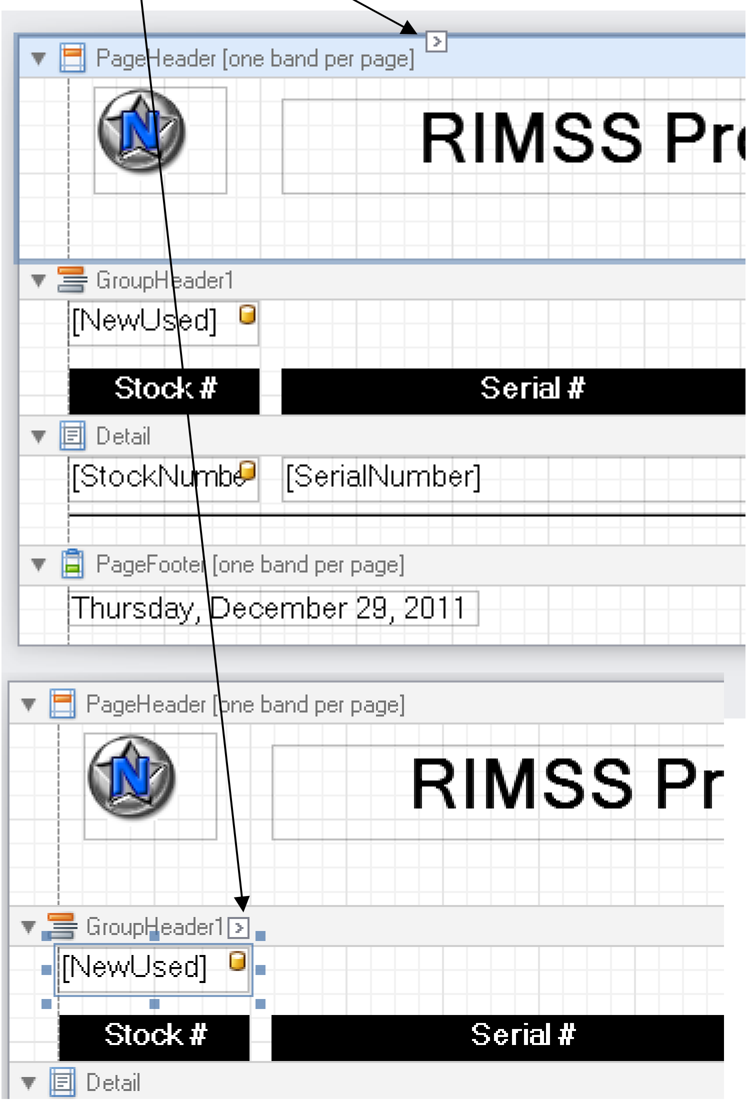
Select Submit. Your Report will run and you will see a preview of your report based upon your parameters.



TIP: You can change the parameters and resubmit your report without exiting the report as many times as you like. However if you make changes to your data in your WG record and you want that updated information to be included in your report, you must exit the report, refresh your data, and then run again.

Formatting Beyond the Property Grid

Each control or object within your report has some additional formatting options available when you select  next to the object which will open up a task window. The options change depending what object you have selected (see details in pictures below).

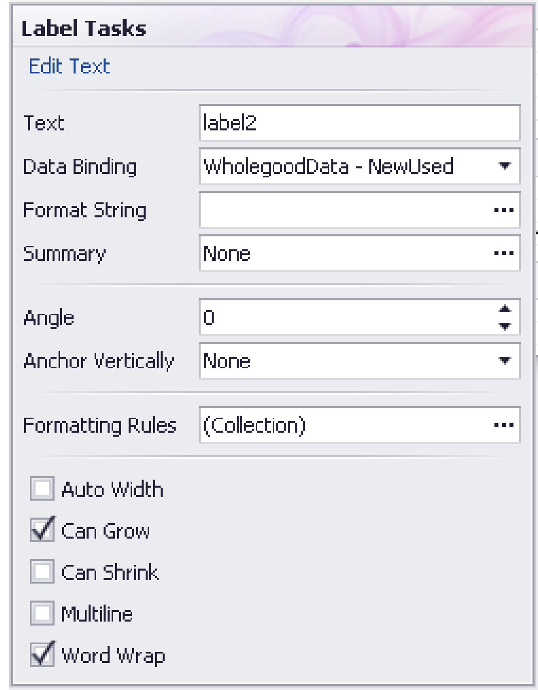


Page Header Tasks

Print On – Select when you want the header to print. The pull down menu gives you several options.

Formatting Rules: Set up Conditional formatting options that can be entered once but applied to multiple report objects versus having to write the formula for each control.

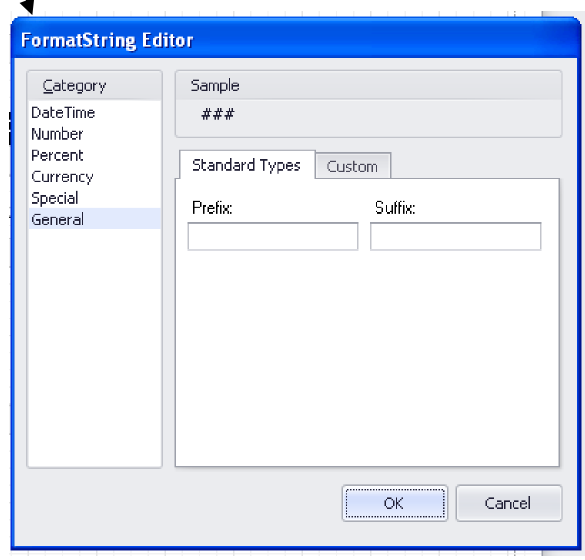
Label Tasks



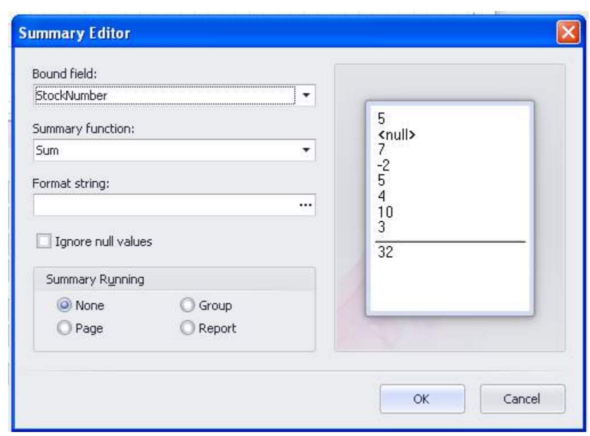
Text – Is the control identifier. You can change this by deleting the default and typing in another field name.

Data Binding – Is how you have bound the field or where the data is being supplied from. You can change the binding by selecting a field from the pull down menu.

Format String - Select from predefined formats for how you want your data to be formatted within that field. (see picture)



Summary - Opens the summary Editor. Allows you to count any field type or do average, get minimum or maximum values or summarize numeric fields. You select whether you want these options to effect your total report, page or group. In other words you can create subtotals using this feature. (see picture below)



Angle – Set the angle that you want your data to be displayed. Most useful for column/data labels not on the data itself.

Anchor Vertically – Sets how the data is anchored-top, bottom or centered.

Formatting Rules – Set up Conditional formatting options that can be entered once but applied to multiple report objects versus having to write the formula for each object.

Auto Width – System sets field width based upon data size.

Can Grow – Allows the field to grow with the size of data. Need to have the Word Wrap checked for this to work properly.

Can Shrink – Allows the field to shrink if it contains no data, i.e., some addresses have 2 lines where others have 1. Your design needs to have both fields but if the address only has 1 line you don't want to have a blank line so this options will eliminate the blank line.

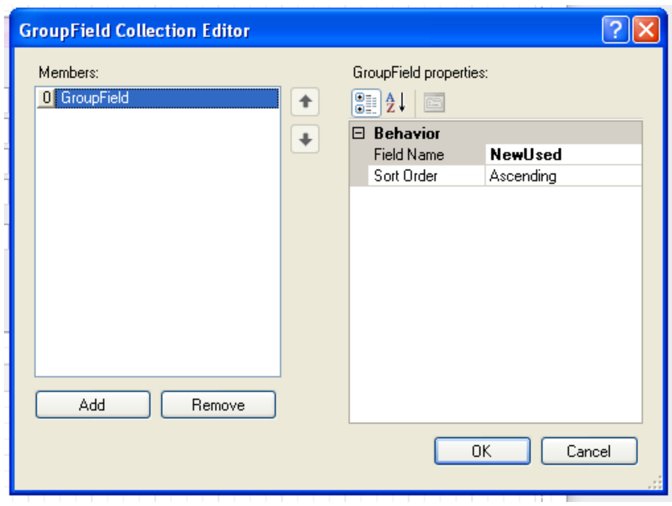
Multiline – If data has multiple lines (i.e., a memo field) it will print all data

Group Header Tasks

Group Fields – select what fields are being grouped and what sort order**.** (see picture)

Group Union – select how you want the data to print. Can it split between pages or do you want to keep it all on one page?

Level – Sorting level – Sort order of group bands. If you have 2 group bands (i.e., new/used and Fuel Type) do you want your data grouped first by fuel type then New/Used or do you want group first by new/used then fuel type. There is no correct way to sort, it just depends on what makes your report display the information in the way you want.



Sorting Summary – If other sorting options have not been set you can set summary options. (Works the same as in the Summary in the Label Tasks)

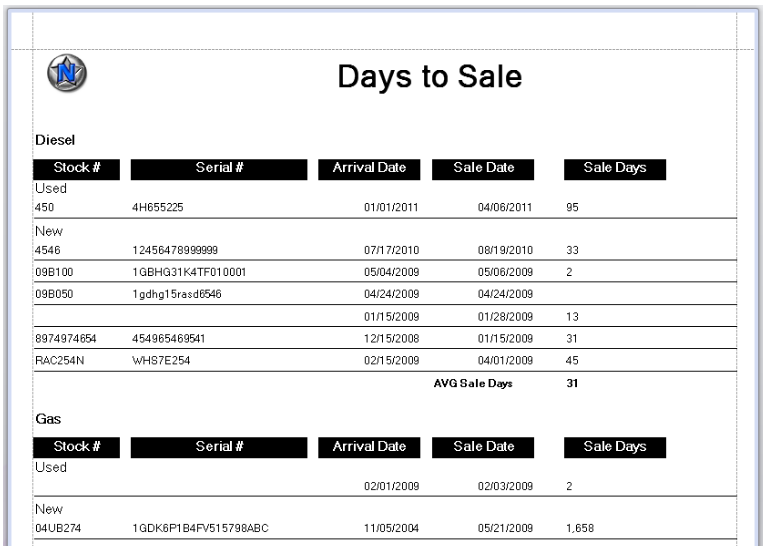
Formatting Rules - See previous formatting rules in Label Tasks area.

Keep Together – works like the Group union. You either have it on or off.

Repeat Every Page – Do you want the group header to print on every page or only at the beginning of the group of data.

Grouping Data to Format Your Report

Grouping data can draw your attention to a variety of information by placing headers and footers in your report. Headers usually contain data that defines what is in the group and footers usually contain summary information. In the examples below both headers and footers have been used. The data is the same in each example, however, it is grouped and totaled differently. The first is grouped and totaled by Fuel type – maybe you want to see if WGs sell faster depending on their fuel type. The second is grouped on WG type – maybe you want to see if your “used” products sell faster than your “new” products. To group data you must insert a header or footer “Band” into your report.



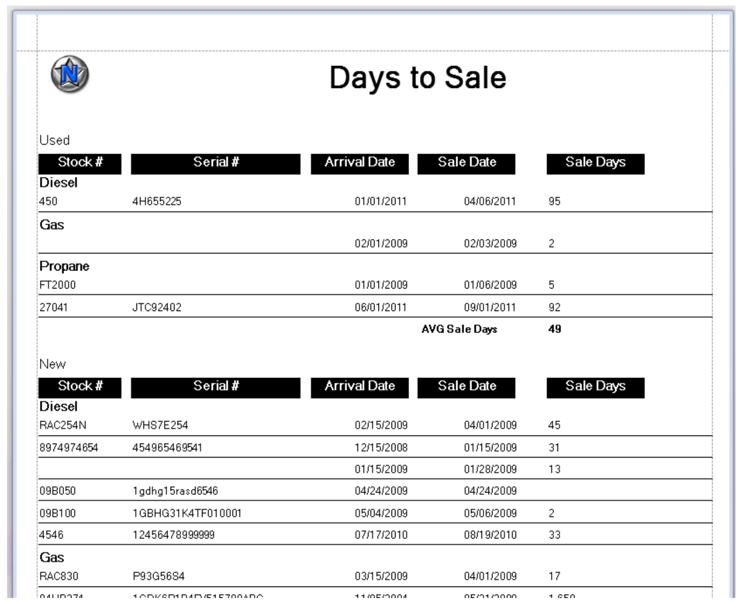
Days to Sale

Diesel

Stock #	Serial #	Arrival Date	Sale Date	Sale Days
Used				
450	4H655225	01/01/2011	04/06/2011	95
New				
4546	12456478999999	07/17/2010	08/19/2010	33
09B100	1GBHG31K4TF010001	05/04/2009	05/06/2009	2
09B050	1gdhg15rasd6546	04/24/2009	04/24/2009	
		01/15/2009	01/28/2009	13
8974974654	454965469541	12/15/2008	01/15/2009	31
RAC254N	WHS7E254	02/15/2009	04/01/2009	45
			AVG Sale Days	31

Gas

Stock #	Serial #	Arrival Date	Sale Date	Sale Days
Used				
		02/01/2009	02/03/2009	2
New				
04UB274	1GDK6P1B4FV515798ABC	11/05/2004	05/21/2009	1,658



Days to Sale

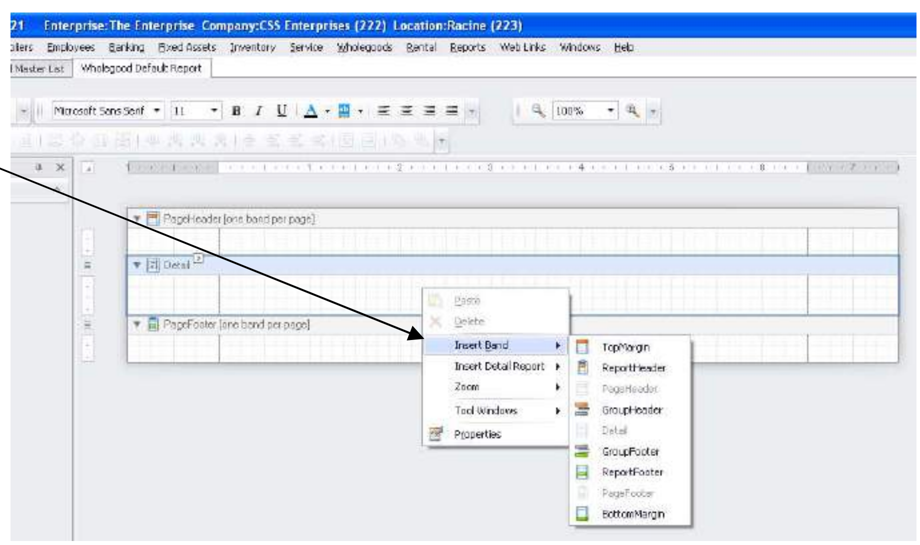
Used

Stock #	Serial #	Arrival Date	Sale Date	Sale Days
Diesel				
450	4H655225	01/01/2011	04/06/2011	95
Gas				
		02/01/2009	02/03/2009	2
Propane				
FT2000		01/01/2009	01/06/2009	5
27041	JTC92402	06/01/2011	09/01/2011	92
			AVG Sale Days	49

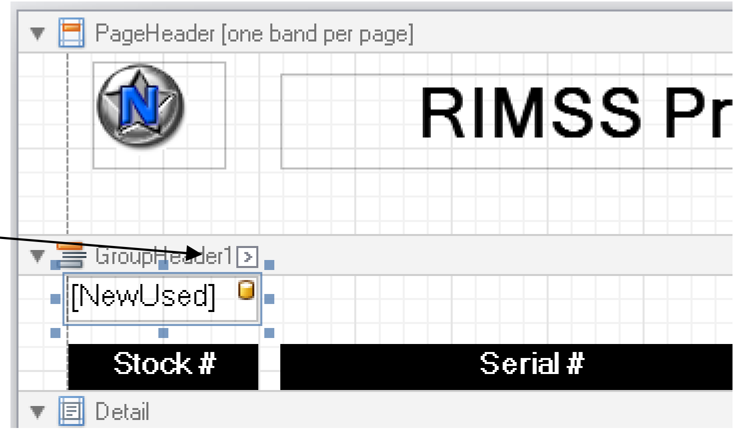
New

Stock #	Serial #	Arrival Date	Sale Date	Sale Days
Diesel				
RAC254N	WHS7E254	02/15/2009	04/01/2009	45
8974974654	454965469541	12/15/2008	01/15/2009	31
		01/15/2009	01/28/2009	13
09B050	1gdhg15rasd6546	04/24/2009	04/24/2009	
09B100	1GBHG31K4TF010001	05/04/2009	05/06/2009	2
4546	12456478999999	07/17/2010	08/19/2010	33
Gas				
RAC830	P93G56S4	03/15/2009	04/01/2009	17

Inserting a group header or footer band: Place mouse over report section and right click. Select Insert Band, and select the type of section you are going to insert.



Enter the properties of the band by selecting the band and clicking on:



Select Group Fields to enter the Group Field Collection Editor.

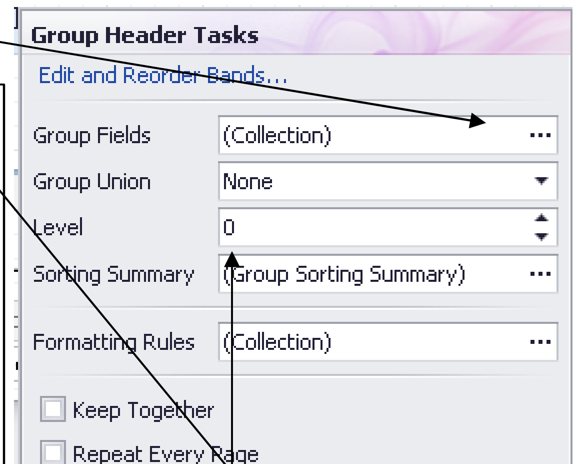
Select Add

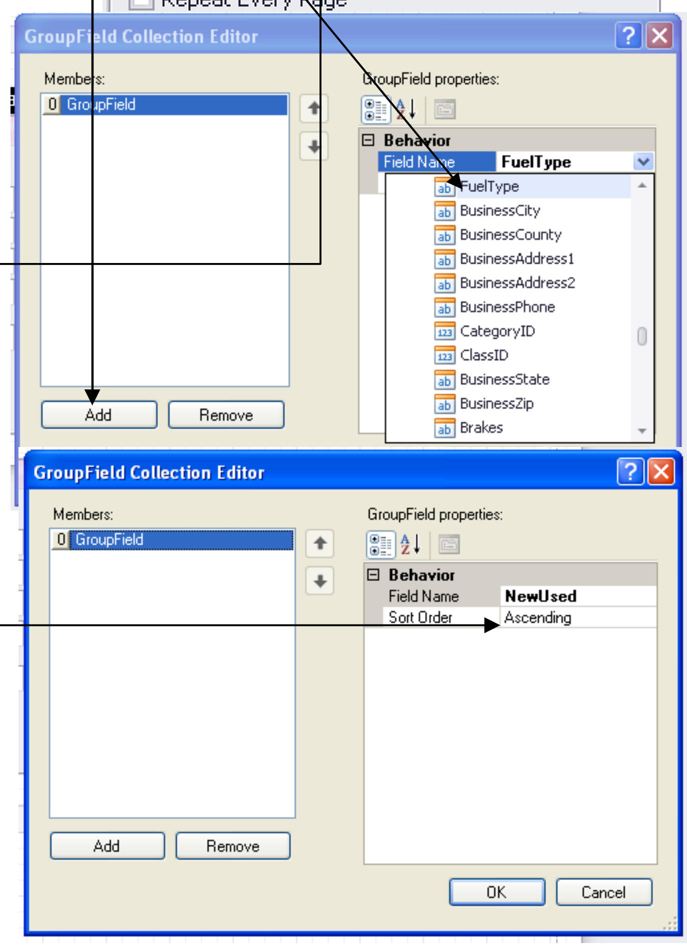
Select the field you want to group by from the pull down menu

Select whether you want your list to sort Ascending A-Z or Descending Z-A

Select OK to return to your Report Design Window.

Repeat these steps for each grouping you may want to have in your report.





Group Union: Set how you want your data to display when it crosses into more than one page. The best way to see how this works is to select the option and see what happens when your report displays.

Level : In the examples on the previous page there are two group bands: GroupHeader 1 is grouping on Fuel Type and Group header 2 is grouping by WG Type (new or used). The difference between the two reports is the **Level** of grouping set in the "band" properties. The level number reflects which grouping is done first. In the 1st report example, Group header 1 has a level of 1 and header 2 is 0. In the 2nd example by type, the group header 2 is level 1 and group header 1 is level 0.

Sorting Summary: When in Group Band, the sorting summary option's default is not to have any options because summary options are usually set on a specific field/control and placed with in a group header or footer.

Formatting Rules: See **Conditional Formatting** on details relating to this.

Keep Together: If checked doesn't allow data to split between pages.

Repeat Every Page: If checked and your report is more than one page, the header contents prints on every page.

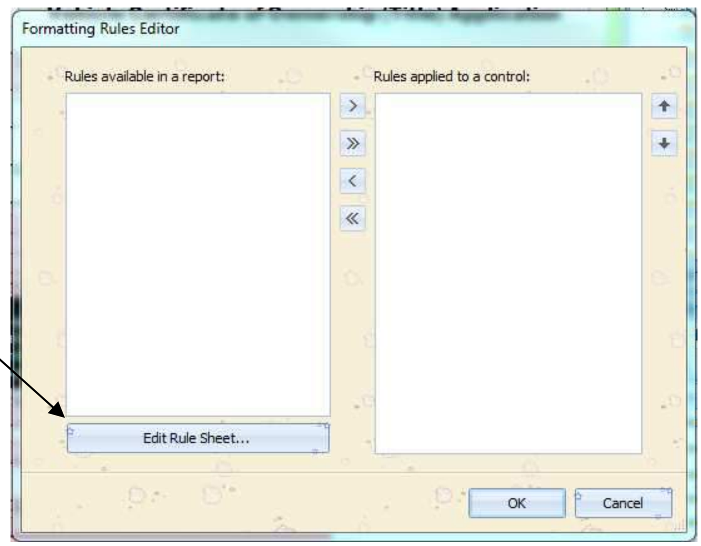
TIP: Header 1 will always be matched to footer 1 if you have both a header and footer. In other words, in our example where our group 1 header is grouped on fuel type and we have it averaging/totaling the Sale Days, we also have a group footer 1. Therefore at each change in fuel type the report will print the average sales days by that group not by any other.

TIP: Any data entered in a Group header or footer section will print when the grouping changes . See the example on previous page where Stock#, Serial #, Arrival Date, Sales Date, and Sale Days column headers repeat when a new group of data starts (i.e., Diesel, Gas, Propane in example 1 or Used or New in example 2). The "Average Sale Days" totals repeats at each change in the groups footer section.

Conditional Formatting

Conditional formatting is formatting that happens on a control only when a certain condition(s) is true. You can create many rules at one time but they will not take affect until you apply that rule to a control. You can pick all established rules or just 1 rule for a control.

For example: The Service Department of your company performs inspections when a WG arrives at your location and prior to the WG being sold/delivered to your customer. You want to track the serial # of the propane tank installed for warranty and recall purposes. The serial number is only available when you can look at the tank during inspection. Your Service Department uses an inspection form which is printed and lists items that are checked on all WGs and also lists specific conponents to that WG from the WG custom reports. Because not all WG have propane tanks installed it is not a regular item to check. So you can set conditional formatting options to highlight the control on the form for the SN if it has a propane tank installed to draw attention to the fact that the this WG has a propane tank installed and that we need the SN.



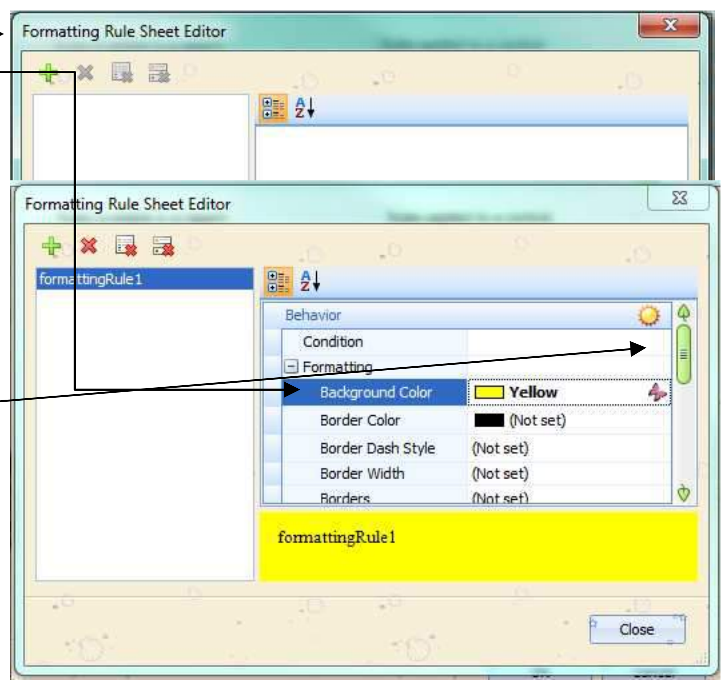
Open the Formatting Rules Editor from the control's property listing:

Select Edit Rule Sheet to open the Formatting Rule Sheet Editor

Select to add a new formatting rule:

Select formatting options from the Behavior box

Set the condition to occur for the new formatting to happen. See example. It will turn the control yellow if the condition is true.



Rename the Formatting Rule

TIP: Because you can use the same rule on several controls that are dependent on the same criteria, name the rule something that is descriptive of what you are doing, i.e., HighlightPropaneSN.

Select the ... in the condition field to open the condition editor. **This is where you will define when the condition happens.**

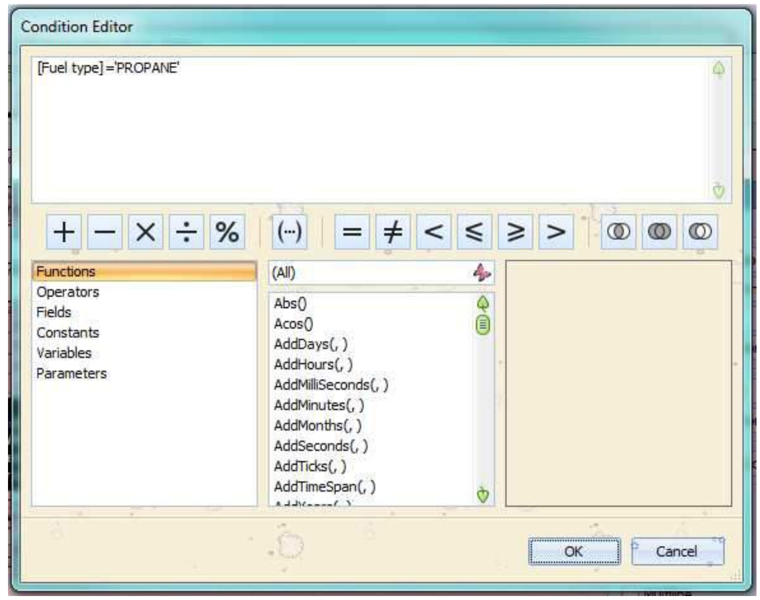
Enter a formula

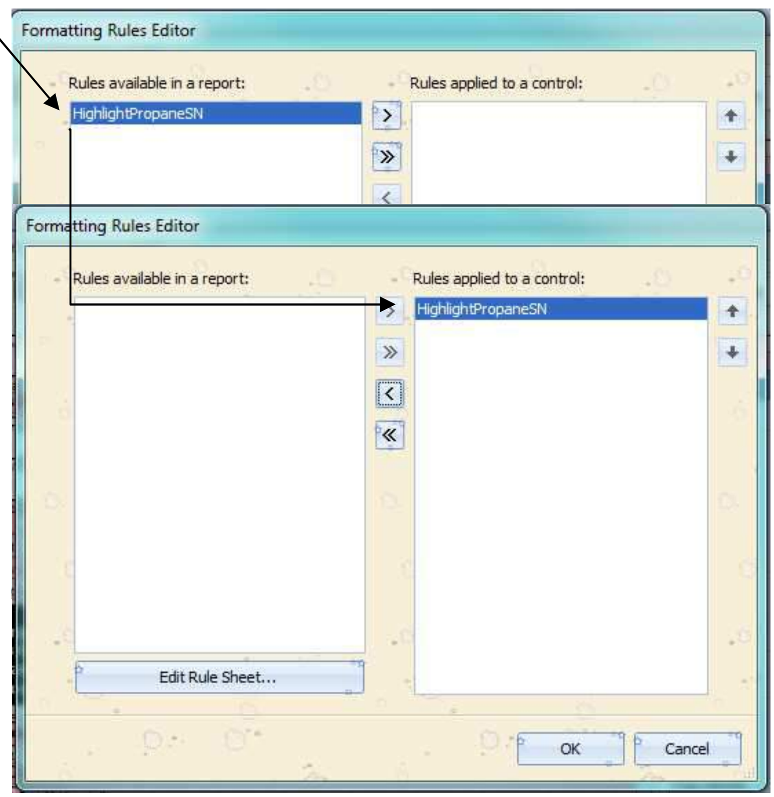
Select OK to return to the Formatting Rule Sheet Editor

Select Close when you have set all conditions and formatting to return to the formatting rules editor.

TIP: You must apply the rule to the control or no formatting changes will take affect when the condition is met.

Select > to apply the conditional formatting to the selected control (notice how the rule moves from the left column to the right column noting that the rule has been applied.).

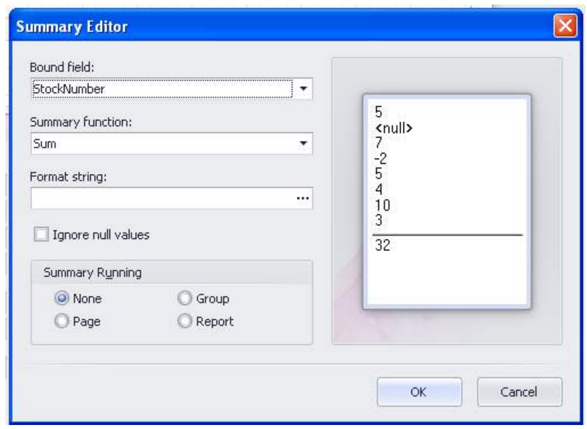




Totals / Subtotals

Place totals or subtotals in your report by using the summary editor withing the properties of your control. Controls that total operate differently depending on which **report band** you place them in and which summary function you choose in the a control's properties summary options.

Totals placed in the report footer (usually a grand total), page footer (usually a subtotal), in a group footer (usually a subtotal), or in the detail section (usually a running total).

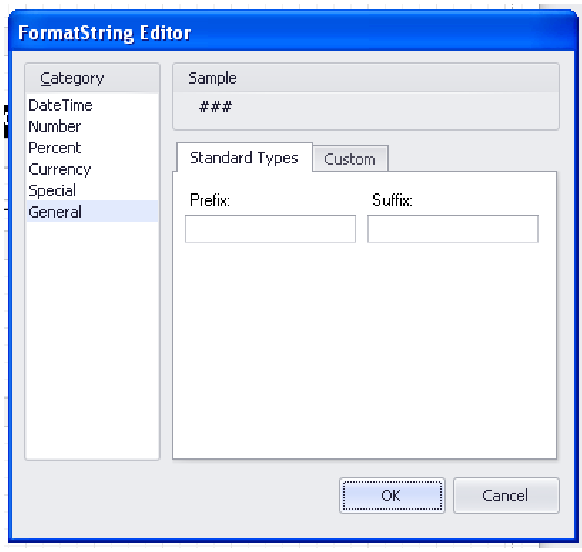


Use the Summary Editor in the formatting options (see Formatting beyond the property grid) to place totals in your report.

Bound Field: Is the data field in which you are performing the summary function.

Summary Function: What type of summary are you wanting to perform on the bound field, i.e., do you want to count the number of WG selected or do you want to sum the total of a column. See table for what Summary functions can be used on what type of field.

	Common Summary Functions							
Field data types		**Sum**	**Count**	**Average**	**Running Summary**	**Percentage**	**Max**	**Min**
	Alpha/Text		✓					
	Date/Time		✓					
	Numeric	✓	✓	✓	✓	✓	✓	✓
	Check / Yes/No		✓					
	Numeric Calculated	✓	✓	✓	✓	✓	✓	✓



Formatting String: Select how you want your data to look in the field.

Ignore Null values: if selected the summary does not include entries without data into the equation. For example, if you are performing a count on the [StockNumber] field and the WG record doen't have a stock number, it would not count it.

Summary Running: Select whether you want your calculation to include data from:

Page: any entries that fit on the page

Group: any entries within a group

Report: totals all entries for the report

Filtering Data

Filter data to refine your results.

Methods to filtering report data

Prefetch filters or Auto Filter Line – Located under the column headings in the data grid area on your WG Master List or Customer Master List. Once data is selected open your report. Only selected data will be included in your report results.

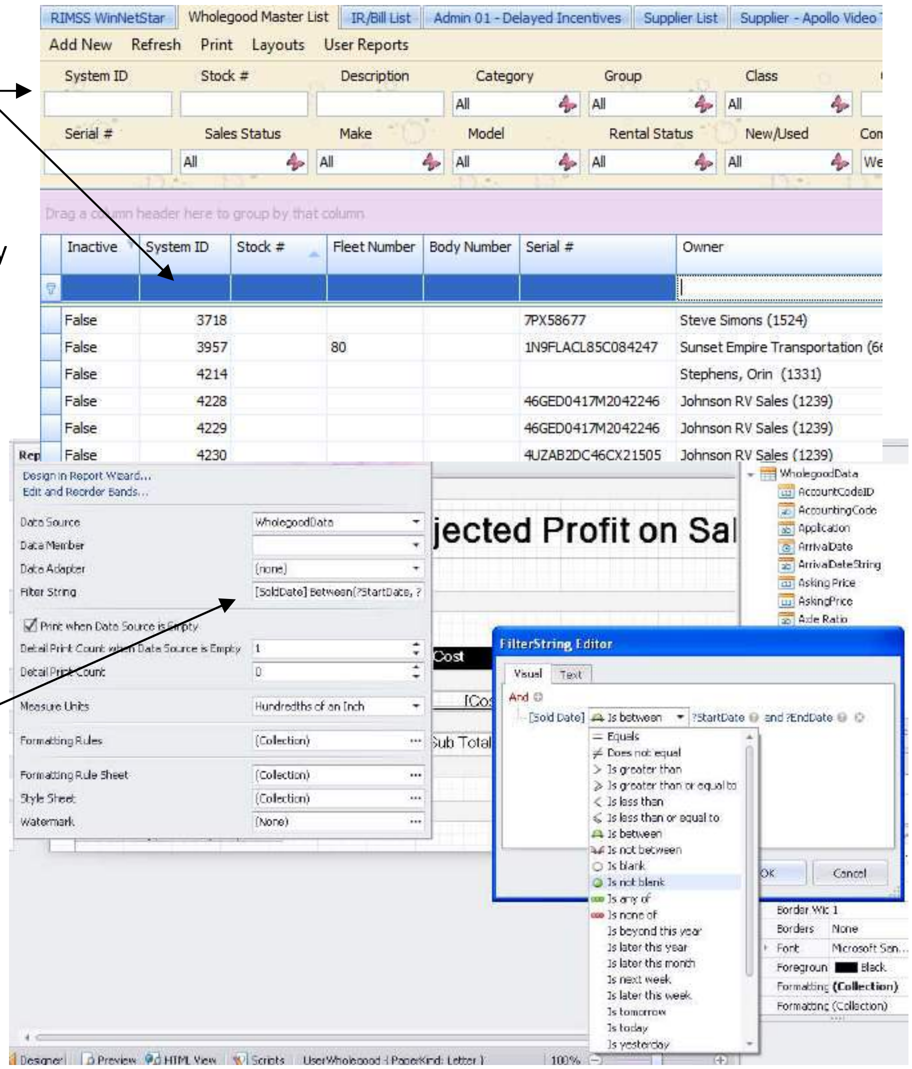
Or

Report properties – Filter String option>Select >select data field by clicking on "default" field to open drop down of all available fields> >select operator>enter data to filter by?>select OK.

TIP: Filter string field now shows whether you have entered a filter using this method.

Or

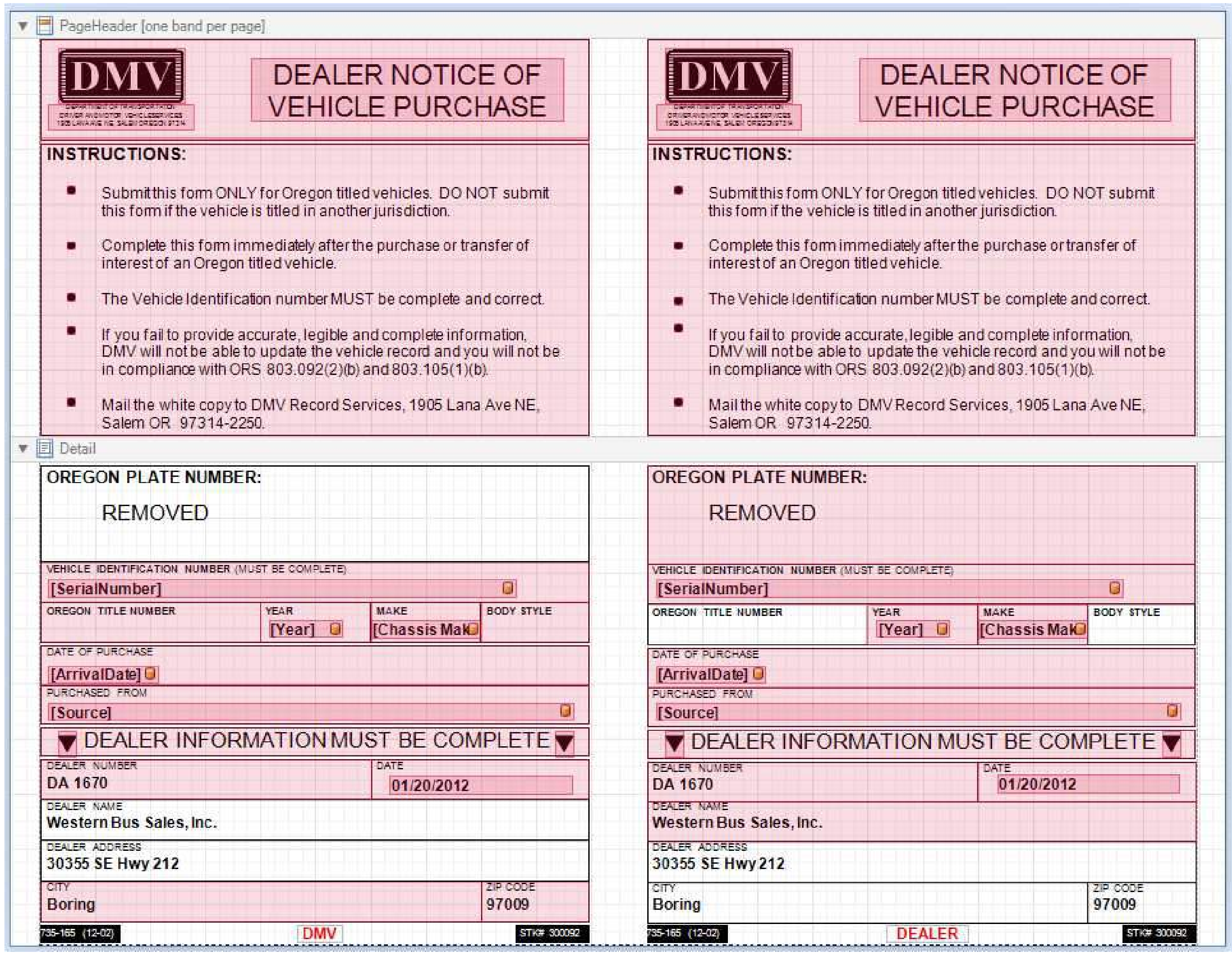
Parameter – Add a parameter field to do "runtime" filtering as discussed in the Creating Parameters section earlier.



TIP: The Report properties and Parameters methods are the most efficient methods for filtering data for a custom report. The Prefetch or Auto Filter Line method for filtering report data works but takes more time to run rather than selecting all data to start and filtering using the other two methods. The slowdown in speed comes from the fact that if you determine your filter is not correct, because your are missing data that you know should be included, you do not have to exit the report, return to the master list, change your filter, refetch the data, reenter the report. By using the Report Properties and Parameter methods all that is required to change the filter, is to reenter the properties and change the filter or change the parameters at run time. The one exception is that if the data is incorrect in the record then you are required to exit, change the data in the record, refetch your data, enter the report, and finally run it again.

Custom Report Examples

Example 1 - Recreated form with parameters set to filter by WG.



Example 1 Design View

DMV
DEPARTMENT OF TRANSPORTATION
DRIVER AND MOTOR VEHICLE SERVICES
1905 LANA AVE NE SALEM OREGON 97314

DEALER NOTICE OF VEHICLE PURCHASE

INSTRUCTIONS:

- Submit this form ONLY for Oregon titled vehicles. DO NOT submit this form if the vehicle is titled in another jurisdiction.
- Complete this form immediately after the purchase or transfer of interest of an Oregon titled vehicle.
- The Vehicle Identification number MUST be complete and correct.
- If you fail to provide accurate, legible and complete information, DMV will not be able to update the vehicle record and you will not be in compliance with ORS 803.092(2)(b) and 803.105(1)(b).
- Mail the white copy to DMV Record Services, 1905 Lana Ave NE, Salem OR 97314-2250.

OREGON PLATE NUMBER:

REMOVED

VEHICLE IDENTIFICATION NUMBER (MUST BE COMPLETE)
1GBHG312471161962

OREGON TITLE NUMBER	YEAR	MAKE	BODY STYLE
	2007	CHEVROLET	

DATE OF PURCHASE
03/13/2007

PURCHASED FROM

▼ DEALER INFORMATION MUST BE COMPLETE ▼

DEALER NUMBER	DATE
DA 1670	01/20/2012

DEALER NAME
Western Bus Sales, Inc.

DEALER ADDRESS
30355 SE Hwy 212

CITY	ZIP CODE
Boring	97009

735-165 (12-02) DMV STK# 300092

DMV
DEPARTMENT OF TRANSPORTATION
DRIVER AND MOTOR VEHICLE SERVICES
1905 LANA AVE NE SALEM OREGON 97314

DEALER NOTICE OF VEHICLE PURCHASE

INSTRUCTIONS:

- Submit this form ONLY for Oregon titled vehicles. DO NOT submit this form if the vehicle is titled in another jurisdiction.
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- Mail the white copy to DMV Record Services, 1905 Lana Ave NE, Salem OR 97314-2250.

OREGON PLATE NUMBER:

REMOVED

VEHICLE IDENTIFICATION NUMBER (MUST BE COMPLETE)
1GBHG312471161962

OREGON TITLE NUMBER	YEAR	MAKE	BODY STYLE
	2007	CHEVROLET	

DATE OF PURCHASE
03/13/2007

PURCHASED FROM

▼ DEALER INFORMATION MUST BE COMPLETE ▼

DEALER NUMBER	DATE
DA 1670	01/20/2012

DEALER NAME
Western Bus Sales, Inc.

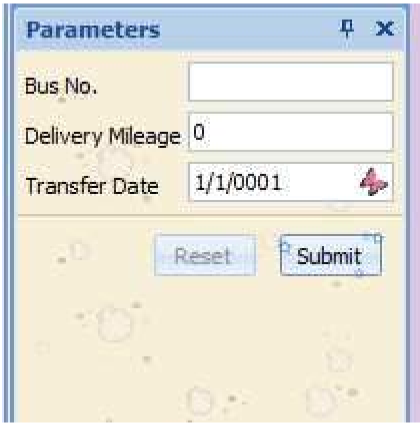
DEALER ADDRESS
30355 SE Hwy 212

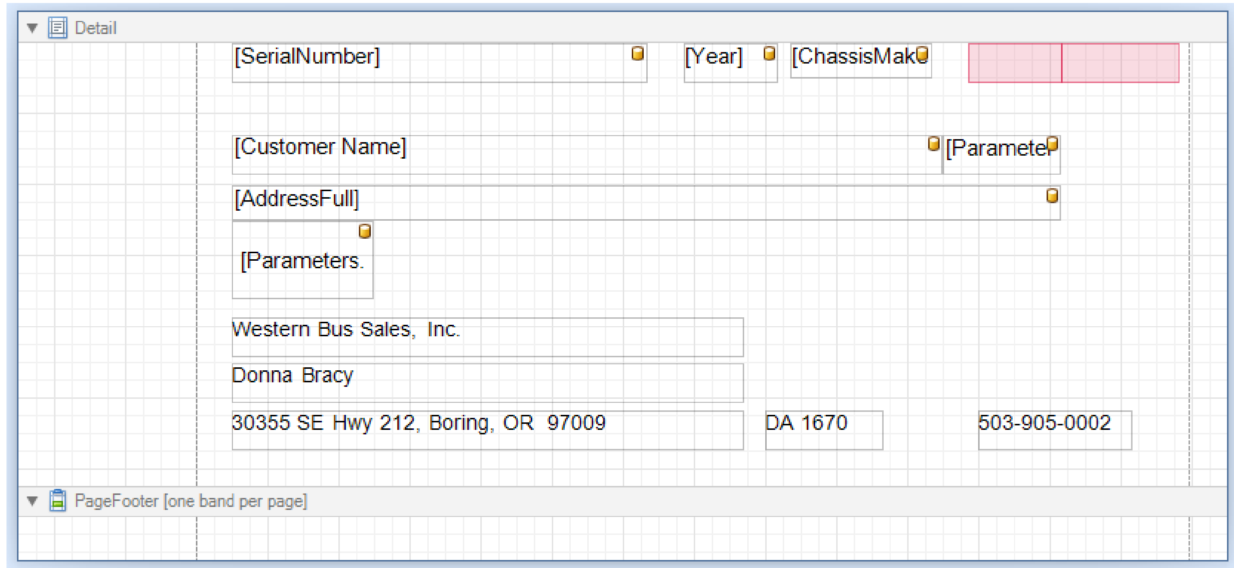
CITY	ZIP CODE
Boring	97009

735-165 (12-02) DEALER STK# 300092

Example 1 - Output

Example 2 - Report created to fill a form provided by other agencies/organizations. Only fields to be completed are included in the design.





Example 2 Design View

1BAAHCPA41F097869 2001

Willamette Leadership Academy 01/01/2012

87230 Central Rd, Eugene, OR 97402

102,000

Western Bus Sales, Inc.

Donna Bracy

30355 SE Hwy 212, Boring, OR 97009 DA 1670 503-905-0002

Report 2 Print Preview

69602-06/3186

DMV

State of Oregon

SECURE ODOMETER DISCLOSURE/REASSIGNMENT

R2584132

Federal and state laws require that you state a vehicle's mileage when there is a transfer of ownership. Failure to complete an odometer disclosure or providing a false statement may result in fines and/or imprisonment. Under Oregon law, the offense of submitting a false odometer disclosure is a Class C felony (ORS 815.430).

PLATE NUMBER	VEHICLE IDENTIFICATION NUMBER	YEAR	MAKE	STYLE	MODEL
	1BAAHCPA41F097869	2001			

FIRST ASSIGNMENT OF TITLE

Assignment areas must be completed fully including the printed names and signatures of buyer(s) and seller(s).

I certify the vehicle described above has been transferred to the following (signature certifies to odometer disclosure and releases interest in the vehicle):

BUYER'S PRINTED NAME: Willamette Leadership Academy
DATE OF SALE OR TRANSFER: 01/13/2012

BUYER'S ADDRESS: 87230 Central Rd, Eugene, OR 97402

ODOMETER READING (NO TENTHS): 102,000

I certify to the best of my knowledge that the odometer reading is the actual mileage of the vehicle **UNLESS** one of the following statements is checked:

- ☐ The mileage stated is in **EXCESS** of its mechanical limits.
- ☐ The odometer reading is **NOT** the actual mileage. **WARNING - ODOMETER DISCREPANCY**

SELLER'S PRINTED NAME: Western Bus Sales, Inc
SIGNATURE:

SELLER'S PRINTED NAME (IF BUSINESS, PERSON SIGNING FOR BUSINESS): Donna Bracy
SIGNATURE:

SELLER'S ADDRESS (IF DIFFERENT FROM FRONT OF TITLE): 30355 SE Hwy 212, Boring, OR 97009
DEALER/WRECKER NUMBER: DA 1670
TELEPHONE NUMBER: 503-905-0002

I am aware of the above odometer disclosure made by the seller/agent.

BUYER'S PRINTED NAME:
SIGNATURE:

SECOND ASSIGNMENT OF TITLE

Assignment areas must be completed fully including the printed names and signatures of buyer(s) and seller(s).

I certify the vehicle described above has been transferred to the following (signature certifies to odometer disclosure and releases interest in the vehicle):

BUYER'S PRINTED NAME:
DATE OF SALE OR TRANSFER:

BUYER'S ADDRESS:

ODOMETER READING (NO TENTHS):

I certify to the best of my knowledge that the odometer reading is the actual mileage of the vehicle **UNLESS** one of the following statements is checked:

- ☐ The mileage stated is in **EXCESS** of its mechanical limits.
- ☐ The odometer reading is **NOT** the actual mileage. **WARNING - ODOMETER DISCREPANCY**

SELLER'S PRINTED NAME:
SIGNATURE:

SELLER'S PRINTED NAME (IF BUSINESS, PERSON SIGNING FOR BUSINESS):
SIGNATURE:

SELLER'S ADDRESS (IF DIFFERENT FROM FRONT OF TITLE):
DEALER/WRECKER NUMBER:
TELEPHONE NUMBER:

I am aware of the above odometer disclosure made by the seller/agent.

BUYER'S PRINTED NAME:
SIGNATURE:

RD ASSIGNMENT OF TITLE

nment areas must be completed ncluding the printed names and tures of buyer(s) and seller(s).

I certify the vehicle described above has been transferred to the following (signature certifies to odometer disclosure and releases interest in the vehicle):

BUYER'S PRINTED NAME:
DATE OF SALE OR TRANSFER:

BUYER'S ADDRESS:

ODOMETER READING (NO TENTHS):

I certify to the best of my knowledge that the odometer reading is the actual mileage of the vehicle **UNLESS** one of the following statements is checked:

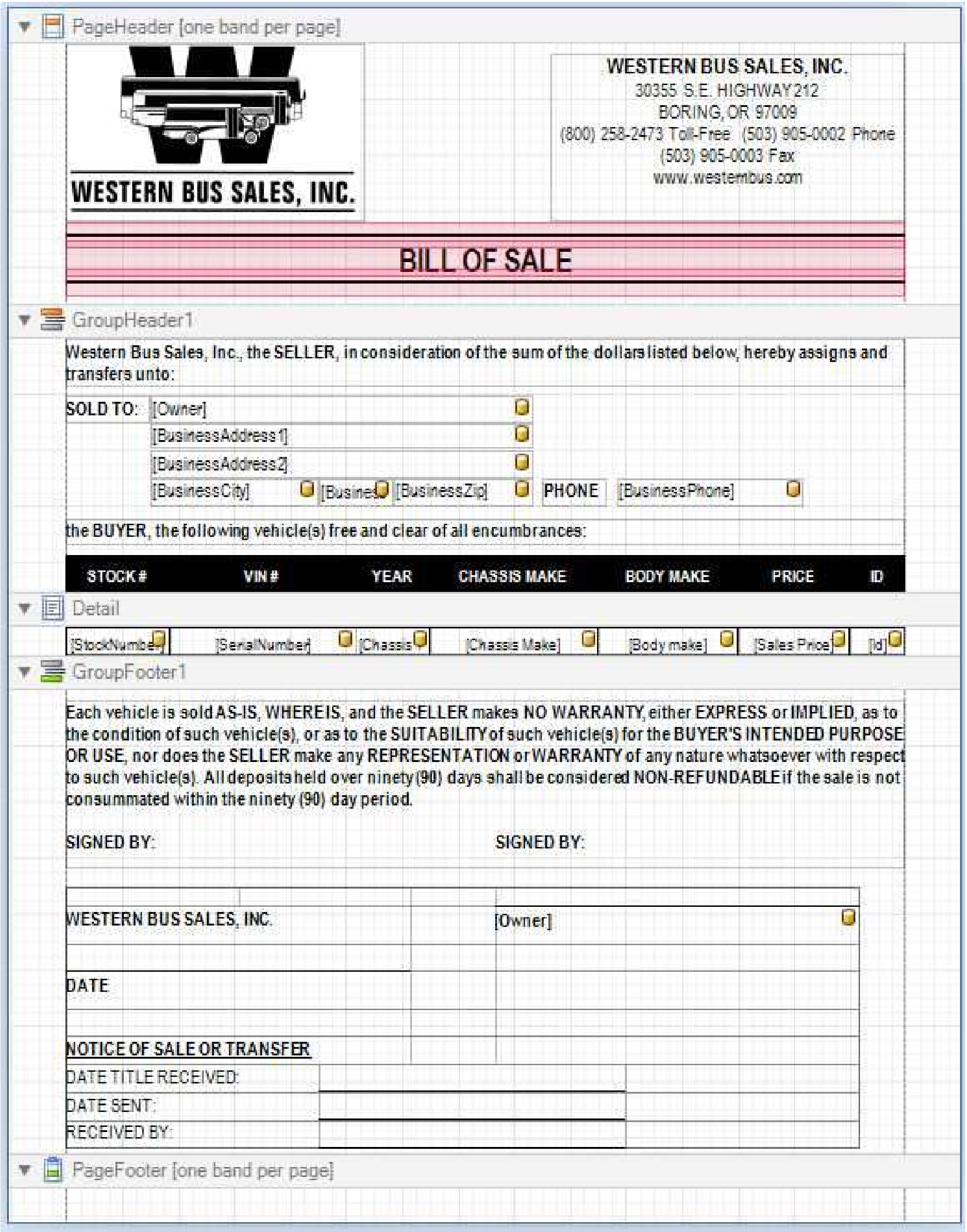
- ☐ The mileage stated is in **EXCESS** of its mechanical limits.
- ☐ The odometer reading is **NOT** the actual mileage. **WARNING - ODOMETER DISCREPANCY**

SELLER'S PRINTED NAME:
SIGNATURE:

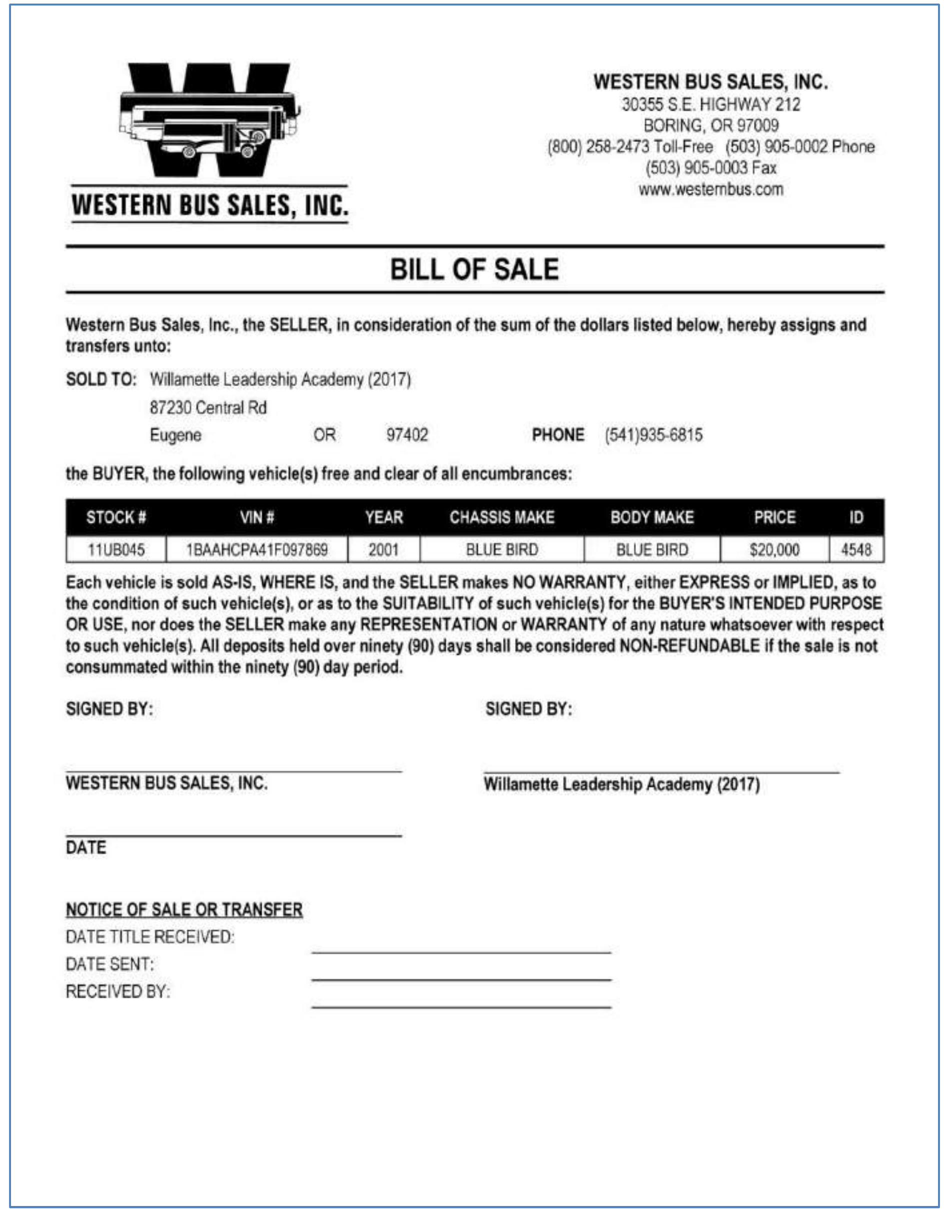
SELLER'S PRINTED NAME (IF BUSINESS, PERSON SIGNING FOR BUSINESS):
SIGNATURE:

SELLER'S ADDRESS (IF DIFFERENT FROM FRONT OF TITLE):
DEALER/WRECKER NUMBER:
TELEPHONE NUMBER:

Example 3 – Bill of sale



Example 3 - Design View 1



WESTERN BUS SALES, INC.

WESTERN BUS SALES, INC.
30355 S.E. HIGHWAY 212
BORING, OR 97009
(800) 258-2473 Toll-Free (503) 905-0002 Phone
(503) 905-0003 Fax
www.westernbus.com

BILL OF SALE

Western Bus Sales, Inc., the SELLER, in consideration of the sum of the dollars listed below, hereby assigns and transfers unto:

SOLD TO: Willamette Leadership Academy (2017)
87230 Central Rd
Eugene OR 97402 **PHONE** (541)935-6815

the BUYER, the following vehicle(s) free and clear of all encumbrances:

STOCK #	VIN #	YEAR	CHASSIS MAKE	BODY MAKE	PRICE	ID
11UB045	1BAAHCPA41F097869	2001	BLUE BIRD	BLUE BIRD	$20,000	4548

Each vehicle is sold AS-IS, WHERE IS, and the SELLER makes NO WARRANTY, either EXPRESS or IMPLIED, as to the condition of such vehicle(s), or as to the SUITABILITY of such vehicle(s) for the BUYER'S INTENDED PURPOSE OR USE, nor does the SELLER make any REPRESENTATION or WARRANTY of any nature whatsoever with respect to such vehicle(s). All deposits held over ninety (90) days shall be considered NON-REFUNDABLE if the sale is not consummated within the ninety (90) day period.

SIGNED BY: **SIGNED BY:**

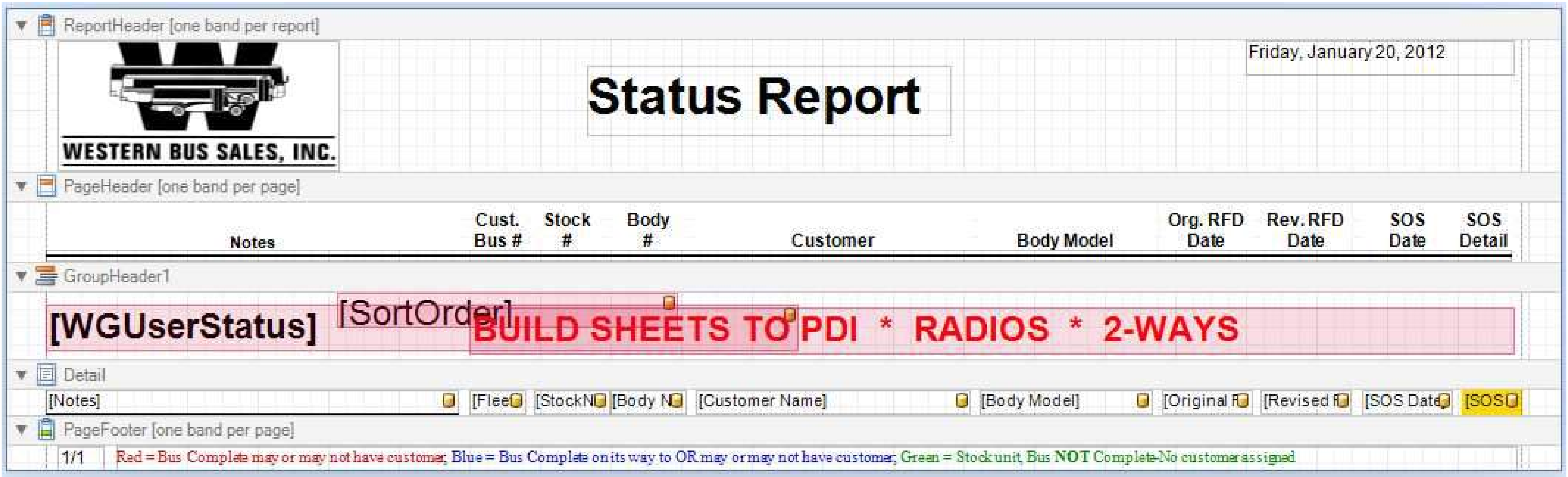
WESTERN BUS SALES, INC. **Willamette Leadership Academy (2017)**

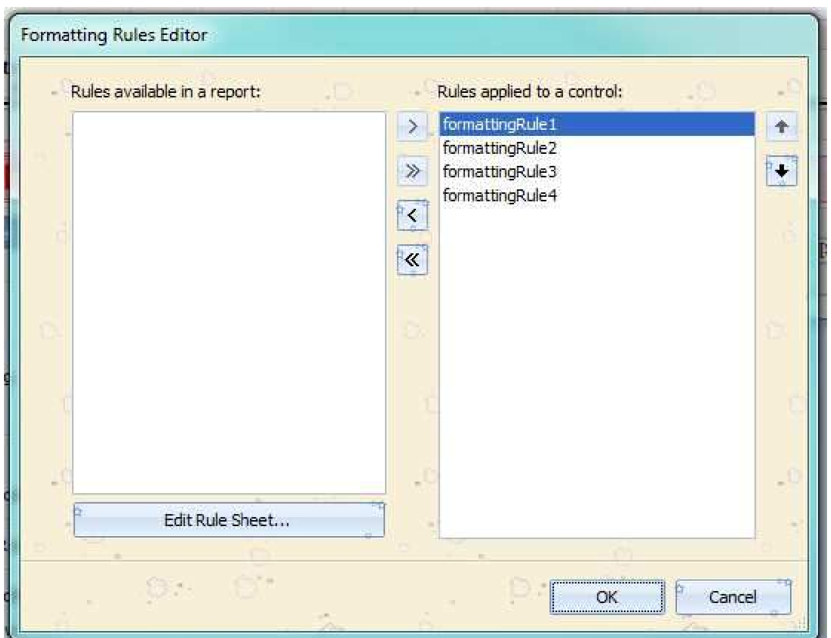
DATE

NOTICE OF SALE OR TRANSFER
DATE TITLE RECEIVED:
DATE SENT:
RECEIVED BY:

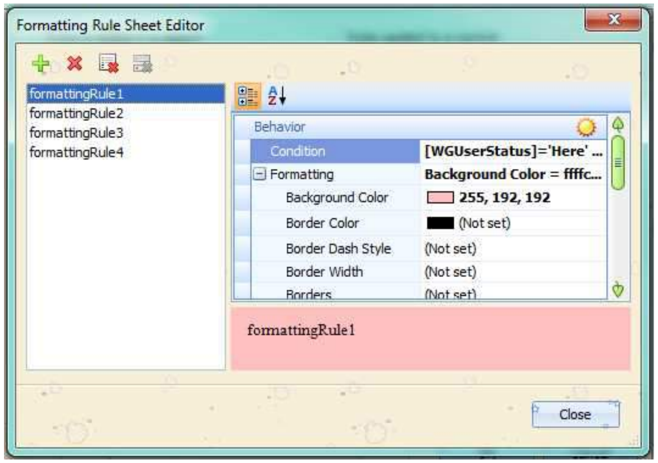
Example 3 - Output 1

Example 4 – Report with custom formatting based upon the WG User status field.



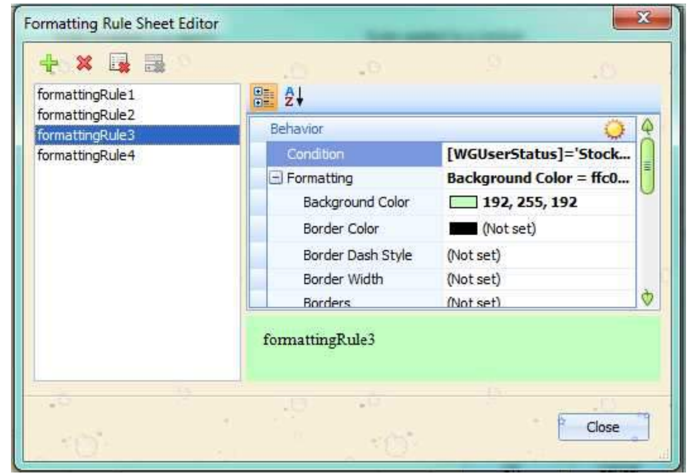


Rule 1 - [WGUserStatus]='Here' OR[WGUserStatus]='Stock-Here' or [WGUserStatus]='Stock - Factory Ready'

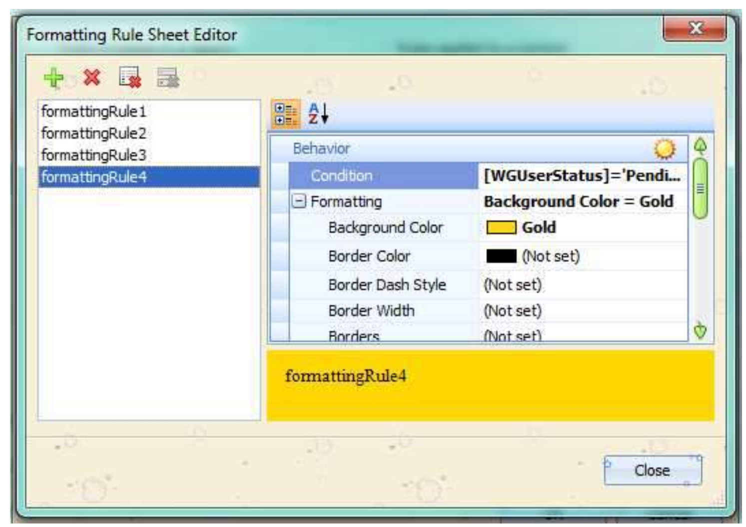


Rule 2 - [WGUserStatus]='IN TRANSIT' OR[WGUserStatus]='Factory Ready' OR[WGUserStatus]='Factory-Customer Pickup' or [WGUserStatus]='At Transarctic - A/C Install'

Rule 3 - [WGUserStatus]='Stock-Factory' OR [WGUserStatus]='Stock - Pending'



Rule 4 - [WGUserStatus]='Pending'



WESTERN BUS SALES, INC.

Friday, January 20, 2012

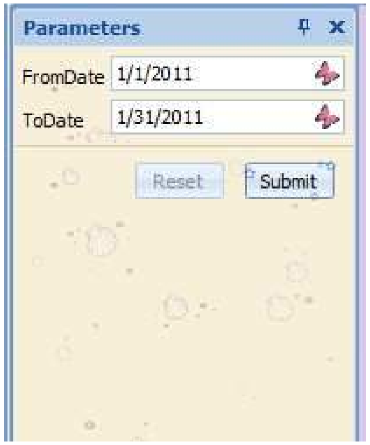
Status Report

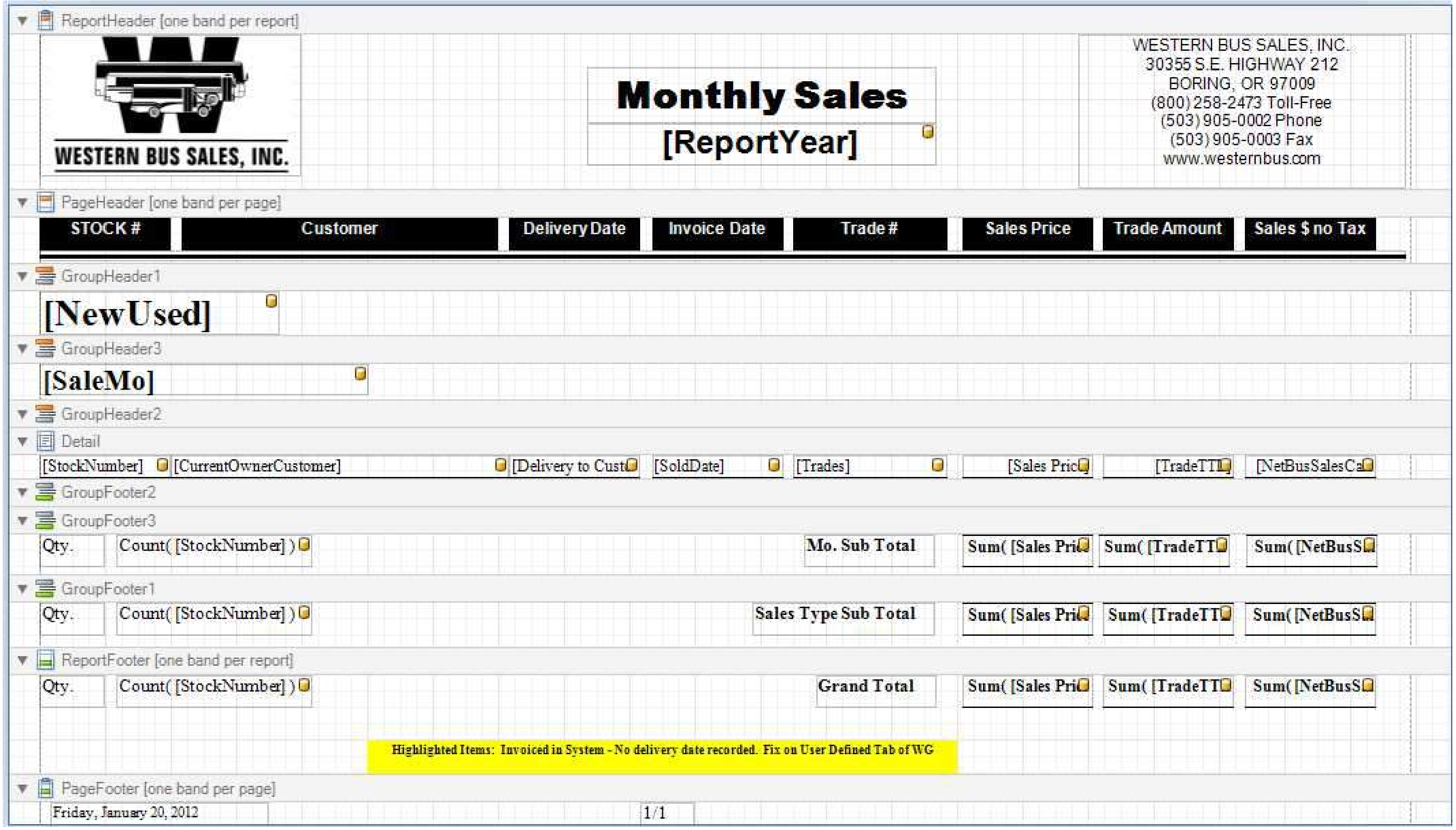
Notes	Cust. Bus #	Stock #	Body #	Customer	Body Model	Org. RFD Date	Rev. RFD Date	SOS Date	SOS Detail
BUILD SHEETS TO PDI * RADIOS * 2-WAYS									
Follow up on LP prior to May / No CM's - No 2-Ways	N/A	12G004	1228521	Oak Hill School	MB-IV	05/31/2012	05/31/2012	06/30/2012	Approx
Here									
	N/A	08L001	F153868	City of Wilsonville	XCEL 102	04/30/2008	05/30/2008	01/31/2012	Before
Stock - Factory Ready									
No CM's - No 2-Ways	TBD	11B050	F428316	STOCK	BBCV2311	12/31/2011	12/31/2011	01/31/2011	TBD @ Sale
Stock - Pending									
	TBD	11B033	F427835	Stock	BBCV3310	11/16/2011	12/15/2011		N/A
No CM's - No 2-Ways	N/A	11H011	21633	Stock	EZ-Street	04/23/2011	04/23/2011		
Stock-Here									
Need RO at Sale	TBD	10B051	F421217	Stock - Soar Program	BBCV1910	02/01/2011	02/01/2011	03/01/2011	N/A
Need RO at Sale	TBD	10B052	F421218	Stock - Soar Program	BBCV1910	02/01/2011	02/01/2011	03/01/2011	N/A
Need RO at Sale	TBD	10B055	F421221	Stock - Soar Program	BBCV2311	01/01/2011	01/01/2011		N/A
Need RO at Sale	TBD	10B058	F421224	Stock - Soar Program	BBCV3310	11/01/2010	11/01/2010	12/01/2010	N/A
Need RO at Sale	TBD	10B059	F421225	Stock - Soar Program	BBCV3310	11/01/2010	11/01/2010	11/01/2010	N/A
Need RO at Sale	TBD	10B064	F421230	Stock - Soar Program	D3RE4006	03/01/2011	03/01/2011	04/01/2011	N/A
Need RO at Sale	TBD	10B093	F423274	Stock - Swap Your Bus	BBCV3310	03/15/2011	03/15/2011	04/15/2011	N/A
Need RO at Sale	TBD	10C016	47910	Stock	GRAND BANTAM 6 WR	12/14/2011	12/14/2010	01/15/2011	N/A
Need RO at Sale	N/A	10V002	41633	Stock	CARAVAN				N/A
Need RO at Sale	N/A	11V001		Stock	CARAVAN				N/A
ORDERED									
Nov. 17th - Final Board Meeting Approval	6	11B052	F429699	Ontario School District	BBCV3310	03/15/2012	02/13/2012	06/01/2012	Before
Nov. 17th - Final Board Meeting Approval	7	11B053	F429700	Ontario School District	BBCV3310	03/15/2012	02/13/2012	06/01/2012	Before
No CM's - No 2-Ways	9	11B054	F430372	Oregon National Guard Youth Challenge Program	D3RE4006	04/05/2012	04/05/2012	05/05/2012	Approx

1/3 Red = Bus Complete may or may not have customer, Blue = Bus Complete on its way to OR may or may not have customer, Green = Stock unit, Bus NOT Complete-No customer assigned

Example 4 - Output 1

Example 5 – Report with parameters, group headers and footers with totals.





Example 5 - Design View 1

Example 5 - Output 1

WESTERN BUS SALES, INC.

Monthly Sales
2011

WESTERN BUS SALES, INC.
30355 S.E. HIGHWAY 212
BORING, OR 97009
(800) 258-2473 Toll-Free
(503) 905-0002 Phone
(503) 905-0003 Fax
www.westernbus.com

STOCK #	Customer	Delivery Date	Invoice Date	Trade#	Sales Price	Trade Amount	Sales$ no Tax
New							
January							
10B056	Glendale School District #77 (318)	01/25/2011	01/28/2011	/	98,149.00	.00	98,149.00
10B070	Lane County School District No. 4J (257)	01/25/2011	01/25/2011	/	122,757.00	.00	122,757.00
10B071	Lane County School District No. 4J (257)	01/25/2011	01/25/2011	/	122,757.00	.00	122,757.00
10B072	Lane County School District No. 4J (257)	01/28/2011	01/30/2011	/	122,757.00	.00	122,757.00
10B075	Lane County School District No. 4J (257)	01/18/2011	01/18/2011	10UB065/	106,493.00	1,000.00	105,493.00
10B076	Lane County School District No. 4J (257)	01/28/2011	01/28/2011	10UB066/	106,493.00	1,500.00	104,993.00
10B077	Lane County School District No. 4J (257)	01/18/2011	01/18/2011	10UB067/	106,493.00	1,500.00	104,993.00
10B078	Lane County School District No. 4J (257)	01/21/2011	01/21/2011	10UB068/	106,493.00	1,500.00	104,993.00
10B079	Lane County School District No. 4J (257)	01/21/2011	01/21/2011	/	106,493.00	.00	106,493.00
10B081	Bend-LaPine School District #1 (98)	01/14/2011	01/14/2011	N/A/	106,611.00	.00	106,611.00
10B082	Bend-LaPine School District #1 (98)	01/14/2011	01/14/2011	N/A/	106,611.00	.00	106,611.00
10G016	ESD 112/ Specialized Transportation Coop (252)	01/26/2011	01/26/2011	/	60,153.00	.00	60,153.00
10G018	ESD 112/ Specialized Transportation Coop (252)	01/26/2011	01/26/2011	/	68,118.00	.00	68,118.00
Qty. 13				**Mo. Sub Total**	**1,340,378.00**	**5,500.00**	**1,334,878.00**
Qty. 13				**Sales Type Sub Total**	**1,340,378.00**	**5,500.00**	**1,334,878.00**
Used							
January							
08UB038	Gene Bryan Fisher (1926)	01/26/2011	01/25/2011	/	2,000.00	.00	2,000.00
10UB074	Lee's Martial Arts Academy Inc (1919)	01/07/2011	01/07/2011	/	21,500.00	.00	21,500.00
10UB082	North Central Bus Sales (1548)	01/03/2011	01/03/2011	/	6,000.00	.00	6,000.00
10UB105	Taylor Bus Sales Inc (711)	01/14/2011	01/14/2011	/	5,600.00	.00	5,600.00
10UB107	Taylor Bus Sales Inc (711)	01/12/2011	01/12/2011	/	5,600.00	.00	5,600.00
10UB108	Taylor Bus Sales Inc (711)	01/11/2011	01/11/2011	/	5,600.00	.00	5,600.00
10UB111	Taylor Bus Sales Inc (711)	01/24/2011	01/24/2011	/	5,600.00	.00	5,600.00
10UB113	Taylor Bus Sales Inc (711)	01/11/2011	01/11/2011	/	5,600.00	.00	5,600.00
10UB115	Taylor Bus Sales Inc (711)	01/11/2011	01/11/2011	/	5,600.00	.00	5,600.00
10UB116	Taylor Bus Sales Inc (711)	01/12/2011	01/12/2011	/	5,600.00	.00	5,600.00
10UB117	Taylor Bus Sales Inc (711)	01/12/2011	01/12/2011	/	5,600.00	.00	5,600.00
10UB118	Taylor Bus Sales Inc (711)	01/11/2011	01/11/2011	/	5,600.00	.00	5,600.00
10UB120	Taylor Bus Sales Inc (711)	01/14/2011	01/14/2011	/	5,600.00	.00	5,600.00

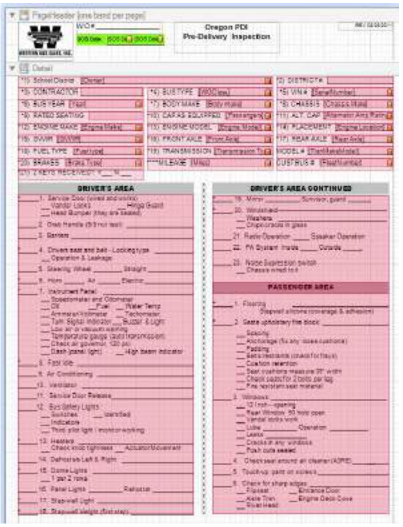
Friday, January 20, 2012 1/2

STOCK #	Customer	Delivery Date	Invoice Date	Trade#	Sales Price	Trade Amount	Sales$ no Tax
January							
10UB121	Taylor Bus Sales Inc (711)	01/12/2011	01/12/2011	/	5,600.00	.00	5,600.00
10UB122	Taylor Bus Sales Inc (711)	01/14/2011	01/14/2011	/	5,600.00	.00	5,600.00
10UB131	Taylor Bus Sales Inc (711)	01/11/2011	01/11/2011	/	5,600.00	.00	5,600.00
10UB132	Taylor Bus Sales Inc (711)	01/12/2011	01/12/2011	/	5,600.00	.00	5,600.00
10UB133	Taylor Bus Sales Inc (711)	01/12/2011	01/12/2011	/	5,600.00	.00	5,600.00
10UB177	Taylor Bus Sales Inc (711)	01/14/2011	01/14/2011	/	7,700.00	.00	7,700.00
10UB178	Taylor Bus Sales Inc (711)	01/14/2011	01/14/2011	/	7,700.00	.00	7,700.00
10UB179	Taylor Bus Sales Inc (711)	01/14/2011	01/14/2011	/	7,700.00	.00	7,700.00
11UB032	Taylor Bus Sales Inc (711)	01/24/2011	01/24/2011	/	10,500.00	.00	10,500.00
11UB043	Taylor Bus Sales Inc (711)	01/14/2011	01/14/2011	/	10,500.00	.00	10,500.00
Qty. 23				**Mo. Sub Total**	**157,600.00**	**.00**	**157,600.00**
Qty. 23				**Sales Type Sub Total**	**157,600.00**	**.00**	**157,600.00**
Qty. 36				**Grand Total**	**1,497,978.00**	**5,500.00**	**1,492,478.00**

Highlighted Items: Invoiced in System - No delivery date recorded. Fix on User Defined Tab of WG

Note:

Means the field is a Bound field.



Fields shaded pink in design view denotes they overlap with another field. The output will not be colored pink unless you have formatted your controls with shading.

Report Ideas – Your imagination is the limit

Window Signs – identify your WG on the lot

Missing data searches – Component serial numbers

Review & analyze - Duplicate information like component serial #, sales margins, days for delivery, interest days

Sales Reports – grouped by year, month, sales person, manufacturer, type, customer, state, county, yearly comparison, projections

Inventory – by finance company, for sale, new, used, stock, customer, aged

Licensing – Title Applications, odometer disclosures, license approvals, statement of error, MSOs, As Delivered

Warranty – Mfg. delayed warranty registrations, claim forms, procedures, service locations, maintenance schedules,

Correspondence – letters

Labels – files, packets

Accounting – credit limits, reconciliations, finance, Receivable - delayed incentives, pending trades, projected margins, job costing, commission calculations

Trend Tracking

Inspection Forms