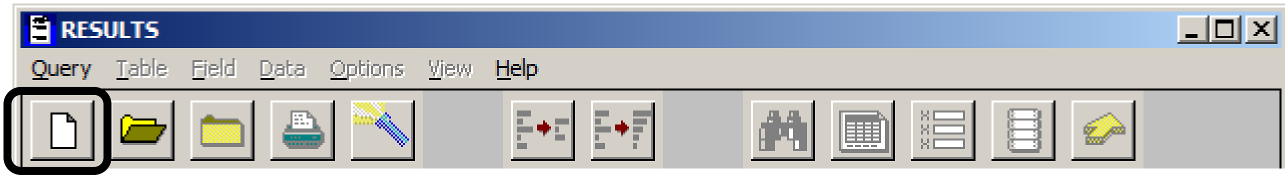
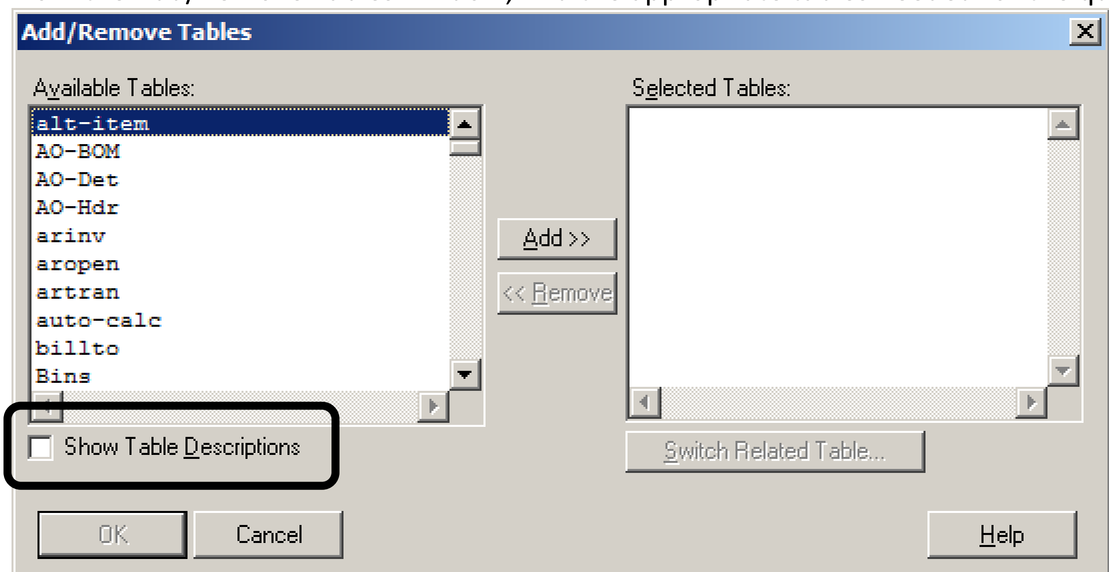
This document is intended to demonstrate creating a Vendor Purchases by Vendor Number and Date Range report using the ProTrac Results Report Writer. In the process of creating this report you will define which data is sorted in the report, pull specific ranges of information, change data headings on the report, and display a total per section and a grand total.

Start by opening Results. Results is not in ProTrac, it is a separate program located either on your desktop or in the Start Menu.

When creating a new query, Results defaults to a report view, which is what we want for this query. Click on the icon that looks like a blank piece of paper to start a new query.



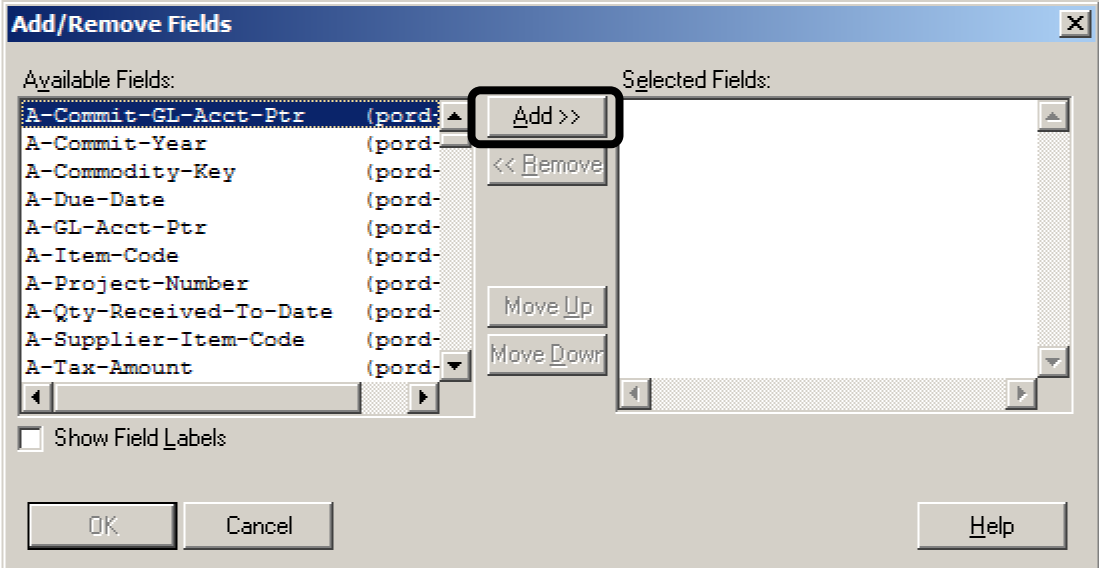
From the Add/Remove Tables window, find the appropriate tables needed for the query.



Notice below the Available Tables section, there is a checkbox to Show Table Descriptions. This can sometimes be helpful for finding the appropriate tables. For this report, we need the porder and also the pord-det tables. When you check the box to show descriptions, you can see that porder is the header information for purchase orders and pord-det is the PO receiving information.

Click on porder from the Available Tables section and click the Add button. The word should now display in the Selected Tables section. Do the same for pord-det.
Click OK to move to the next step.

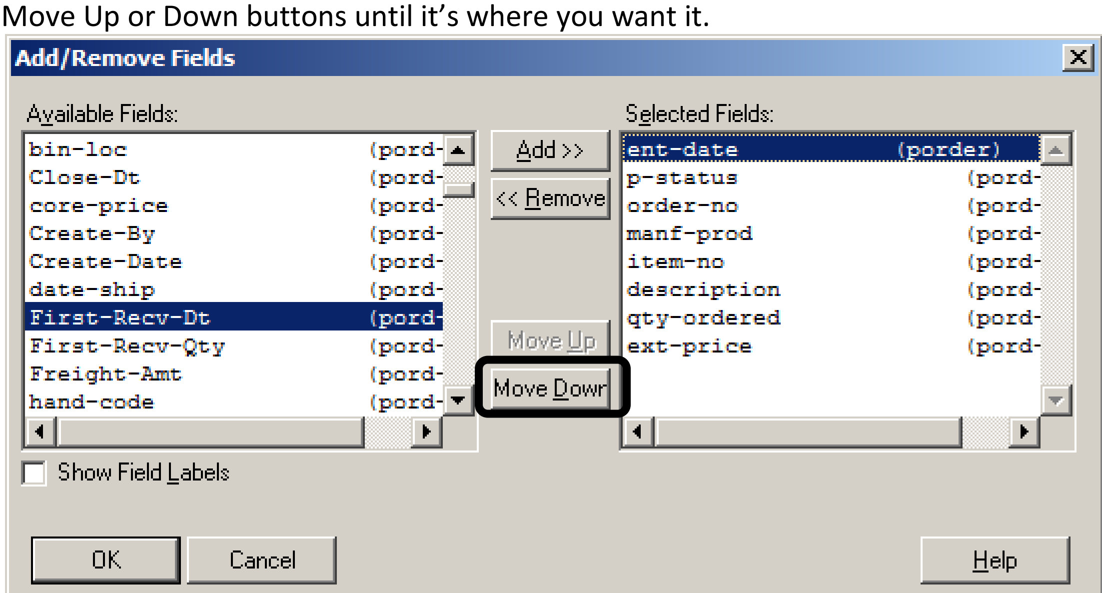
From the Add/Remove Fields window, find the fields you want to display on this report.



Notice to the right of each field name, is another name in parenthesis. This is the name of the table which the field is coming from. I want to select ent-date from the porder table since I know that information is on the header of the Purchase Order. I don't need to select Vendor number or name because this report will only be run for one vendor at a time. We can add that information to the report Header later.

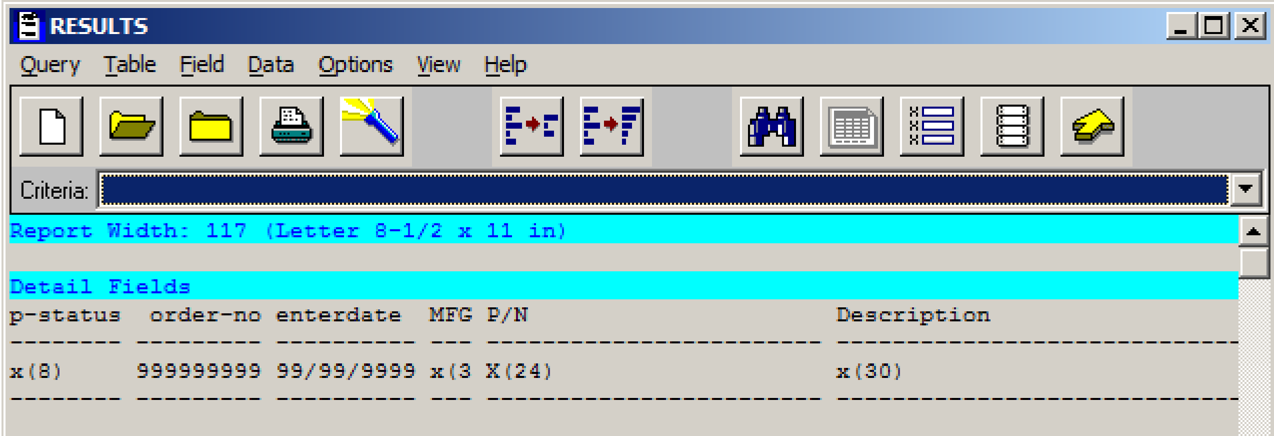
I want to select the specific order information from pord-det since that is the PO receiving information. For this report, I want to see p-status (the status an item on the Purchase Order can be open, complete, cancelled, and backordered), order-no, manf-prod (which is the item's Product Line), item-no, description, qty-ordered, and ext-price.

Now that the fields are added, I will use the Move Up and Move Down buttons to arrange them in the order I want to see them in the report. Click on the field you want to move up or down. Once it's selected, click the Move Up or Down buttons until it's where you want it.



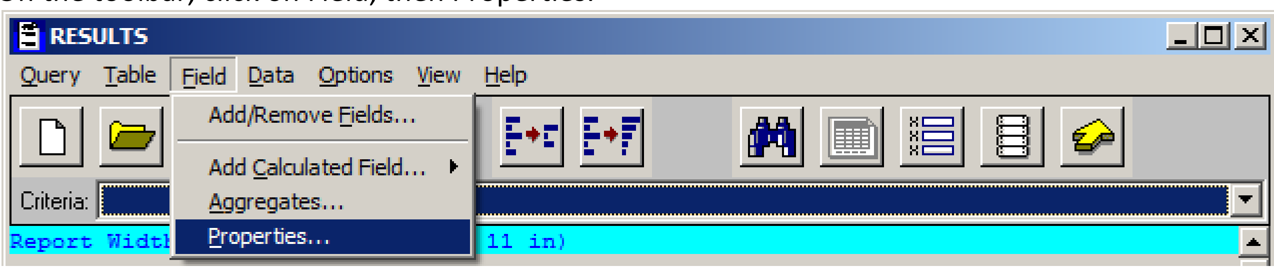
Once the fields are arranged to your liking, click the OK button to proceed.

Now Results displays your query in report form.

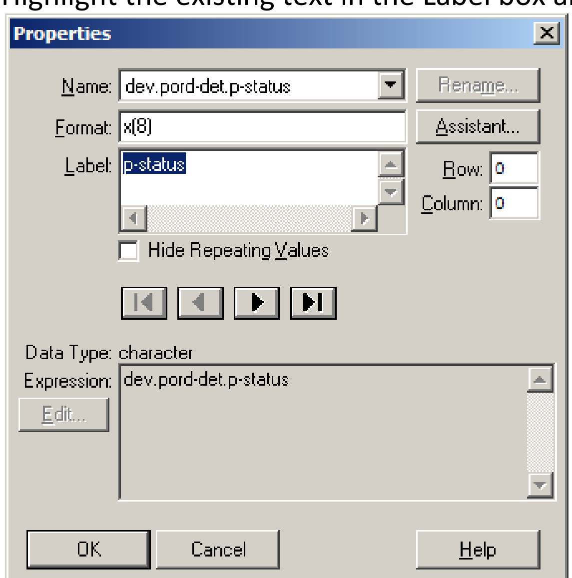


The characters and numbers you see on the screen are placeholders for your real data. The column headers will usually make enough sense to leave as they are but in this case, I find the column headers p-status and P/N confusing so I'm going to change those labels. I also need to change the Quantity Ordered column to display a whole number rather than display 3 decimal places.

On the toolbar, click on Field, then Properties.

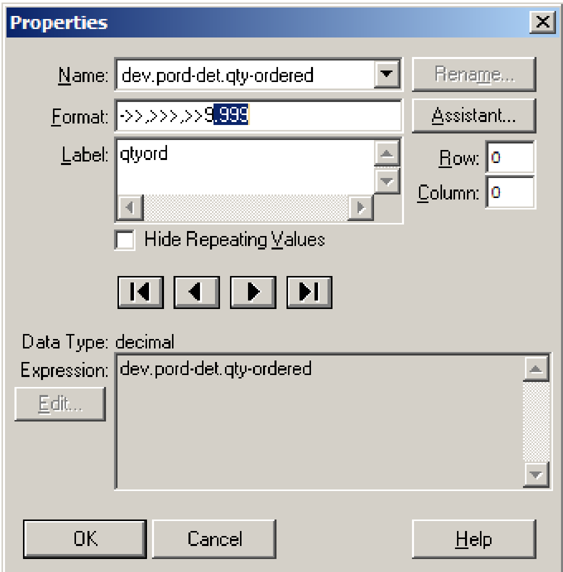


In the properties window, use the drop-down list to find p-status and click it.
Highlight the existing text in the Label box and change it to your new label.



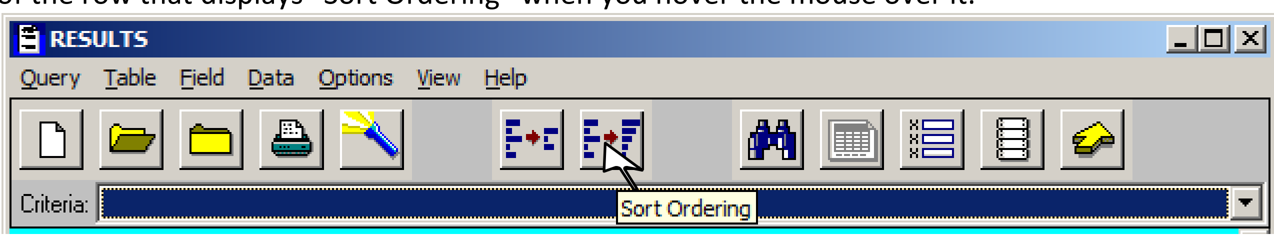
I'm calling mine "PO Status". Notice when you look for P/N it's not listed. I happen to remember that I chose item number to display in the column where P/N displays as the column label. If you didn't remember, however, you can simply click on the Name box so it's blue, and then use your keyboard down arrow to scroll through each name and watch the Label box until you see the one you're looking for.

I also noticed in the placeholder screen that Quantity Ordered was displaying 3 decimal places, but quantity will always be a whole number. Find qty-ordered in the Name box, and look at the Format box. The carrots, also known as a greater-than symbol, represent how many digits are allowed to fill this field. Following the carrots is the format of that number. In this case, 9.999 tells Results that the number needs to be displayed showing 3 decimals places. To change it to a whole number, simply remove the decimal point and the 3 nines following it.



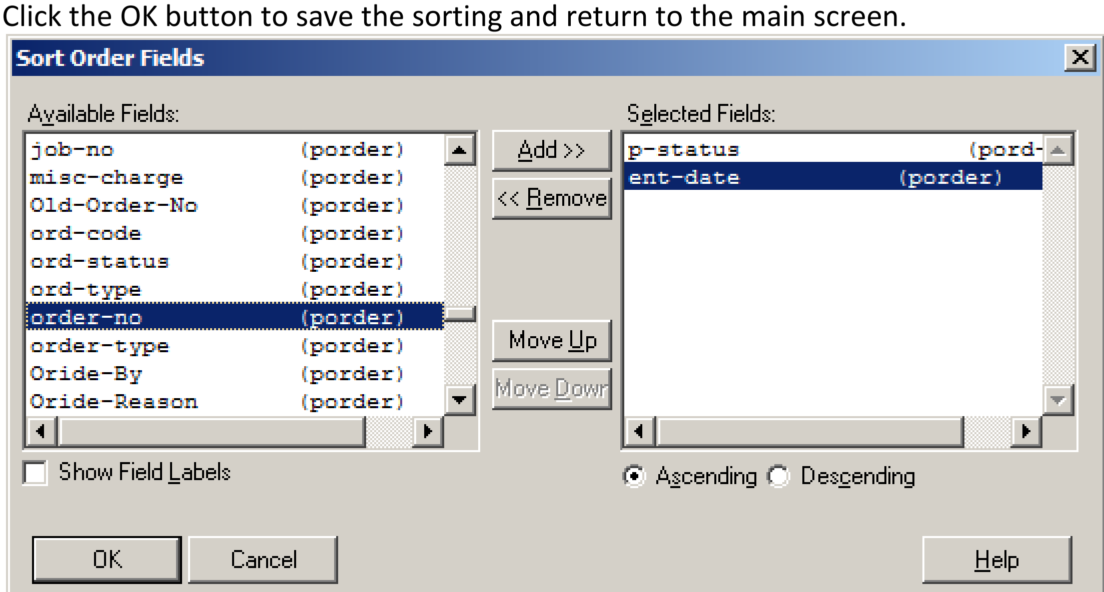
Click the OK button to save the changes you made in Field Properties.

Now we need to tell the query how to sort the data we're looking at. To do so, click on the icon in the middle of the row that displays "Sort Ordering" when you hover the mouse over it.

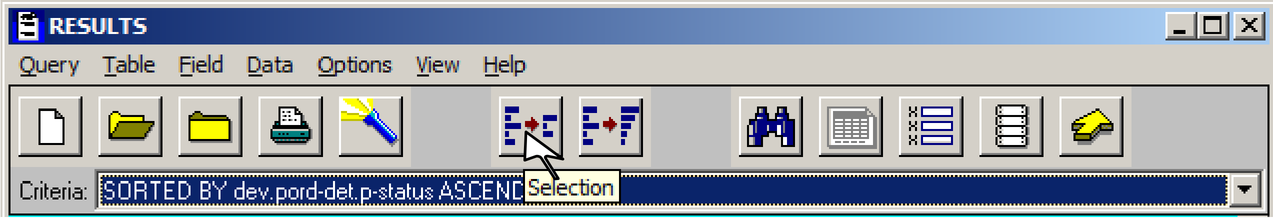


From the Sort Order Fields window, select the field in Available Fields and click the Add button to move it to the Selected Fields section. I want to see this report in order of PO Status, then by entry date, and finally by order number. Remember that entry date is with the table porder.

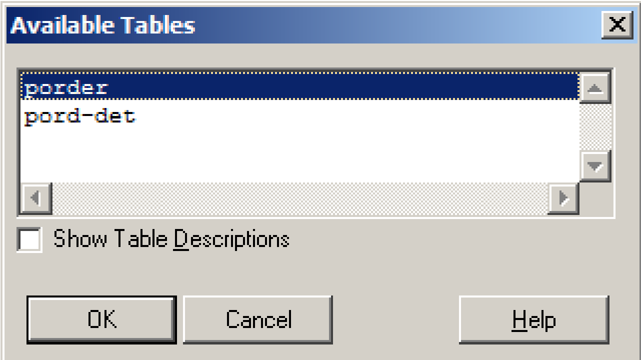
Click the OK button to save the sorting and return to the main screen.



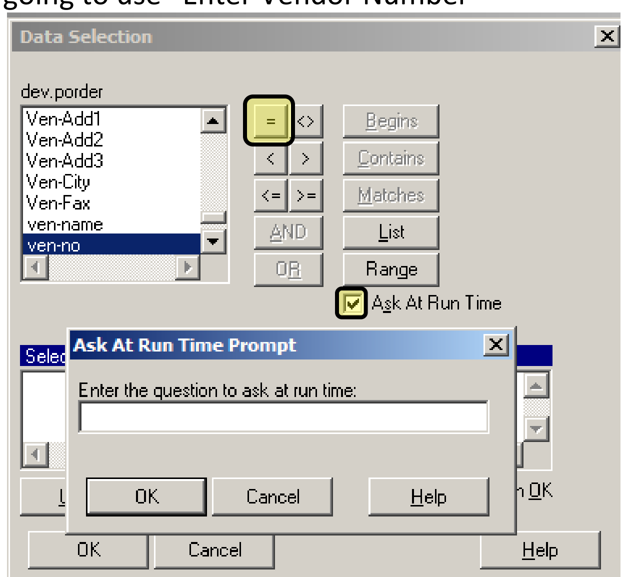
We need to set this query to ask us which Vendor's information to look up and for what date range. To do this, click on the icon in the middle of the row that displays "Selection" when you hover the mouse over it.



From the Available Tables window, select porder.



Find the field called ven-no and single click. Check the box "Ask At Run Time" and select the equal sign from the available symbols. In the Ask At Run Time Prompt window, type in the appropriate words for this step. I'm going to use "Enter Vendor Number"

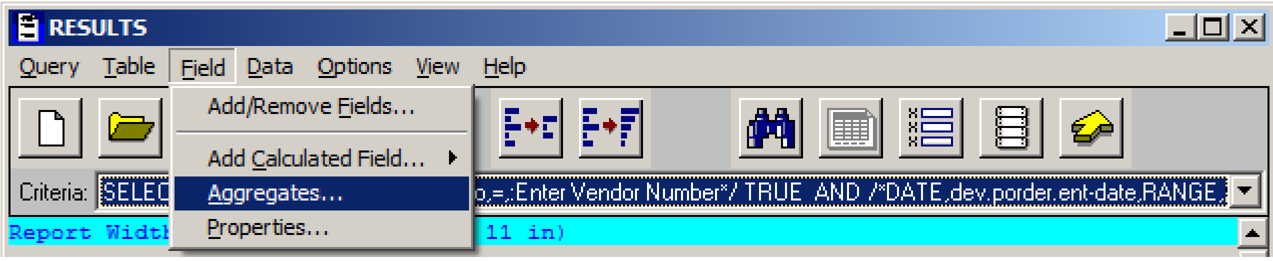


Click the **AND** button to add another selection.

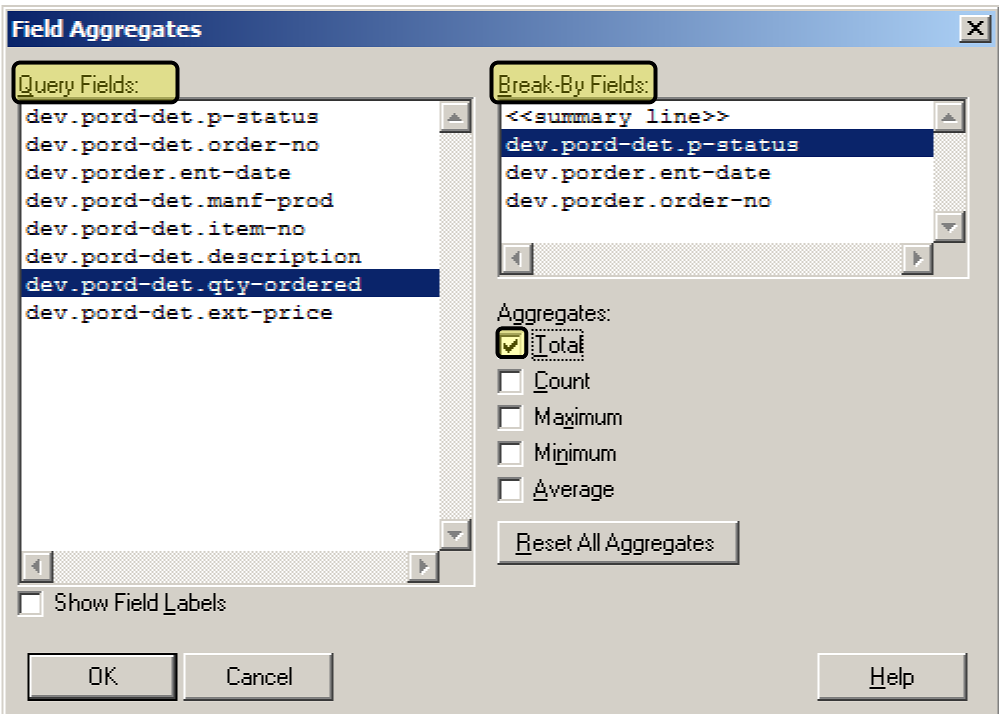
Find the field ent-date and single click. The box "Ask At Run Time" should already be checked, if it's not then place a check there now. Click the Range button. In the Ask At Run Time Prompt window, type in the appropriate words for this step. I'm going to use "Enter Date Range".

Click the OK button to save these selection criteria.

We need to add totaling lines to four sections. I want to see the total quantity ordered and total extended price for each PO status section. I also want to see a grand total of quantity ordered and the extended price. To do this, click on Field in the Toolbar and select Aggregates.

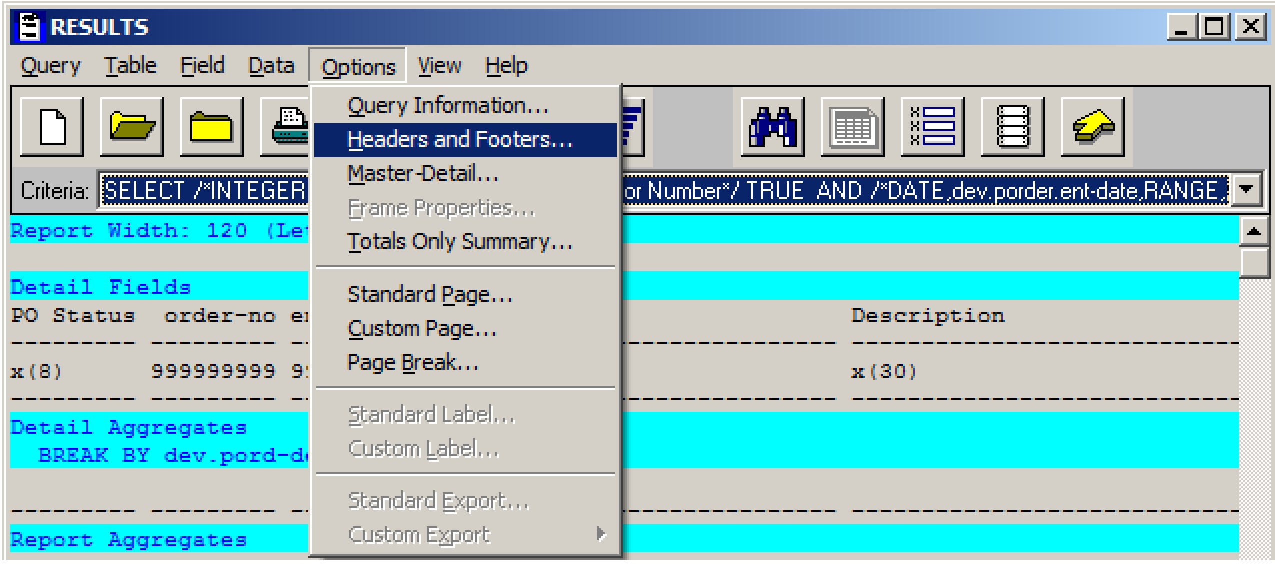


In the Field Aggregates window, select Qty-ordered in the Query Fields section and then select p-status in the Break-By Fields section. Mark the checkbox next to Total. Then click on the <<summary line>> in the Break-By Fields section and mark the checkbox next to Total again.

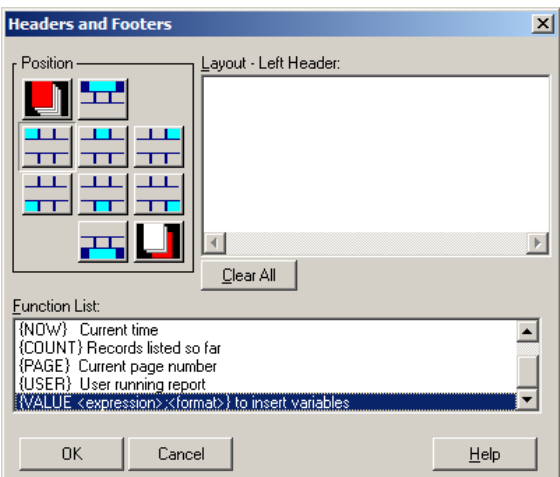


Select the Ext-price in the Query Fields section and select p-status in the Break-By Fields section. Mark the checkbox next to Total. Then click on the <<summary line>> in the Break-By Fields section and mark the checkbox next to Total again.

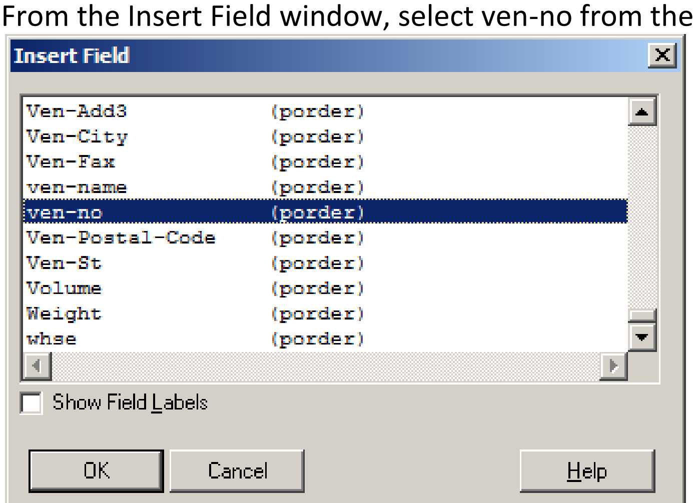
To add the Vendor number and name to the report's Header, click on Options in the Toolbar, then click Headers and Footers.



In the Headers and Footers window, choose the position of the Header or Footer as desired. Then in the Function List section, scroll to the bottom and double-click on {VALUE <expression>;<format>} to insert variables.



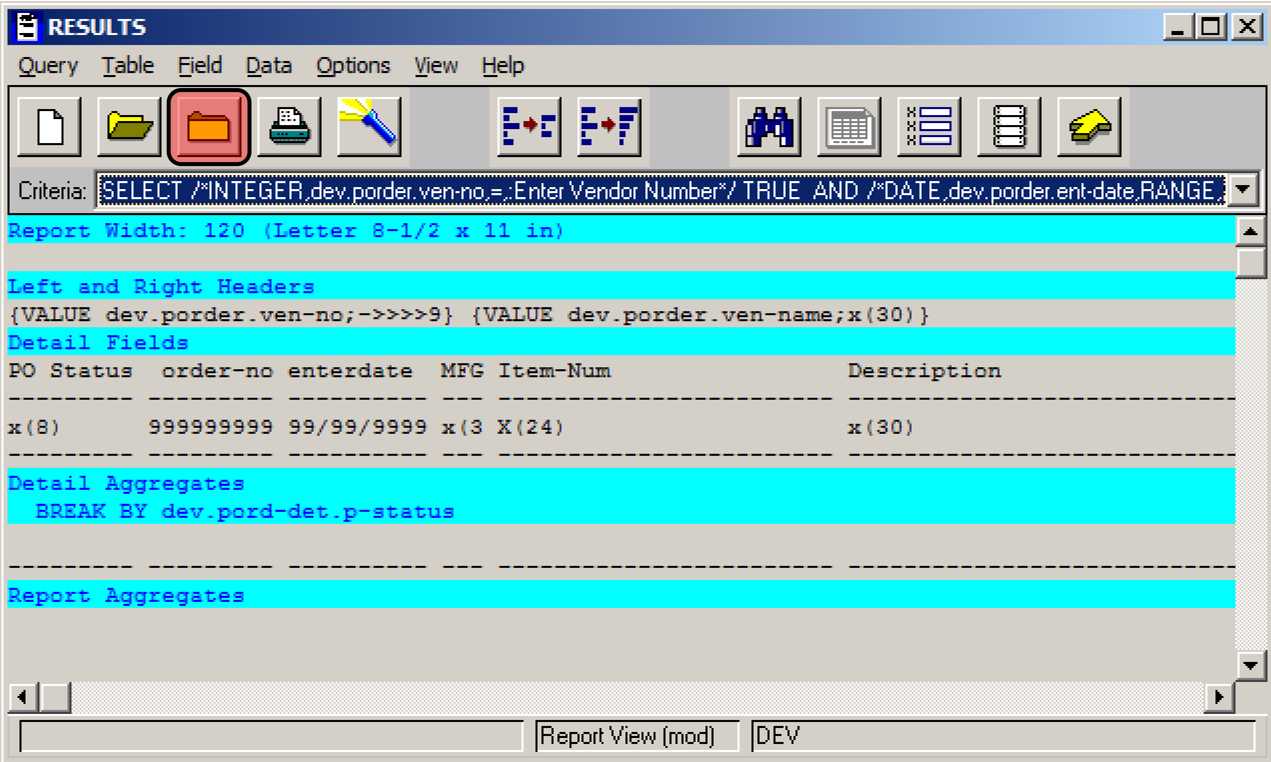
From the Insert Field window, select ven-no from the porder table.



Click the OK button.

Enter a space and double-click on VALUE again. This time, select ven-name from the porder table in the Insert Field window. Click the OK button.

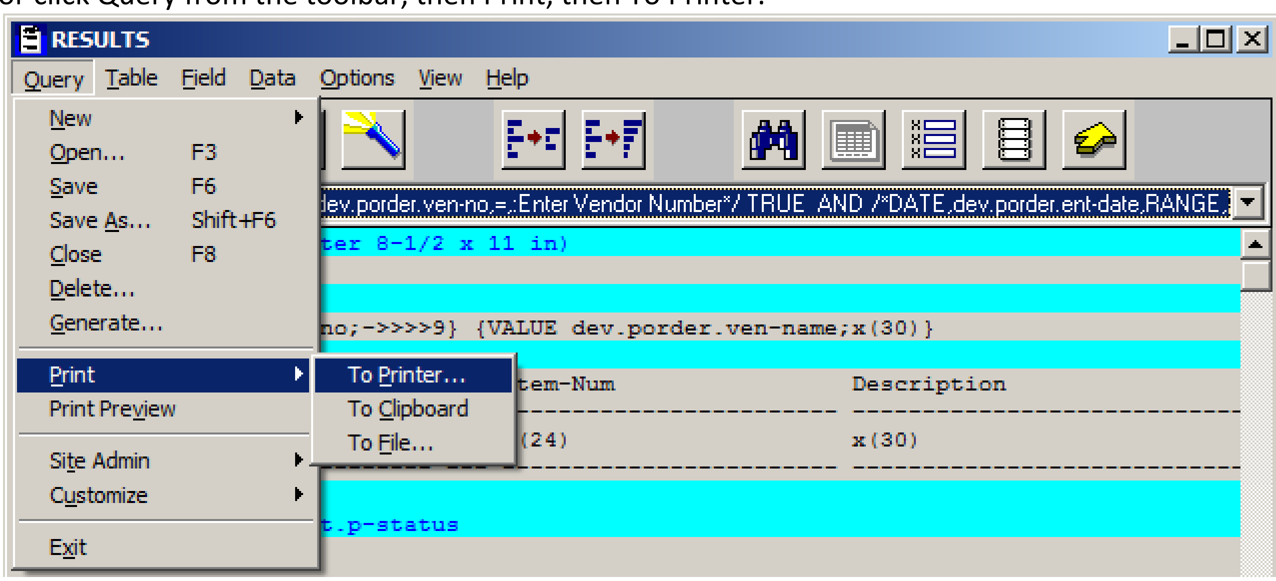
The report building procedure is complete! Save your work by clicking the save icon.



To preview your report, click the flashlight.

To print your report, either click the printer icon from the preview screen

or click Query from the toolbar, then Print, then To Printer.



You will have to enter the selection criteria each time you run or print the report. The data will always be up to date with ProTrac data.