Infor10 iEnterprise (Infinium) Platform Products

Guide to Query

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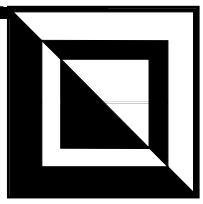

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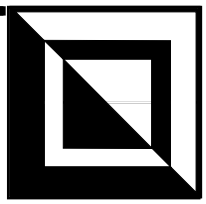
About This Guide



This section answers the following questions:

- Who should read this guide?
- What is the purpose of this guide?
- How is this guide organized?
- What conventions are used in this guide?
- Where can you find related information?

Who Should Read This Guide?

This guide is for Infinium database application users who need to design and generate customized reports for any of these database applications through the use of Infinium QY.

These users need to know how to do the following:

- Design and create Infinium QY report definitions
- Maintain existing Infinium QY report definitions
- Generate Infinium QY reports
- Use Infinium QY utilities for tasks such as printing report definitions

What Is the Purpose of This Guide?

The purpose of this guide is to provide the following:

- Background, concepts, and step-by-step procedural instructions for designing and generating Infinium QY reports

- Background and instructions for using the Infinium Query utilities available to the general Infinium QY user

The guide is designed for use in any of the following ways:

- For students to follow along and take notes during Infinium QY training classes
- For users to learn Infinium QY basics through self-paced on-the job study at their own sites
- For users to reference during the design and generation of Infinium QY reports and the execution of utilities

For more information about this guide as part of class room training materials, refer to the About This Course topic in Part 1.

How Is This Guide Organized?

This guide is divided into the following six parts.

Part	Title	Description
1	Introduction	Two topics, as follows: About This Course: Information such as agenda and objectives, for those using the guide in a classroom setting About Infinium QY: A short high-level overview of the system
2	Designing a Report	Instructions and worksheets for planning a report
3	Defining and Reviewing a Single-File Report	Basic instructions for creating a single-file on-line report definition and using interactive query to review the definition
4	Modifying a Report and Defining a Complex Report	Detailed instructions for modifying report controls, selecting libraries and files, joining files, selecting fields, formatting report columns, setting up selection criteria, and so forth
5	Generating and Working with Reports	Instructions for running a defined report, using report definition and report output directories, and related utility tasks

Part	Title	Description
6	Appendices	Blank design plan worksheet templates Charts of commonly-used physical file names and one or more sample reports for a wide range of Infinium applications Instructions for accessing on-line product-specific file and field information

What Conventions Are Used in This Guide?

This guide uses the following conventions:

Convention	Description	Example
F4	Keys found on your keyboard are represented by a key symbol.	Press F4 to display a list from which you can select a valid entry.
Menu Options and *Field Names*	Menu options and field names are represented by *italics*. This guide uses the same upper and lower case patterns as the system displays on your terminal.	Select *Report Definition*. Type a value in the *Report Name* field.
`Data you type` and **`System generated Messages`**	Characters, numbers, words, and phrases that you type or messages that the system displays are represented by a bold monospaced typeface.	Type **`1`** in the *Line spacing* field. The system displays the following message: **`Value is invalid`**

Convention	Description	Example
Select...	Throughout this guide, you are instructed to select an option from a menu or an item from a list on a selection screen. To select a menu option, place the cursor next to the desired option, type any non-blank character and press Enter. To select an item from a selection list, type the appropriate character as instructed and press Enter. **Note:** If autoenter is enabled in your user profile, it is not necessary to press Enter but you cannot select multiple items.	From the Infinium QY main menu, select *Report Definition*. Type **P** in the *Opt* column next to the primary file for this report. Type a number between 1 and 24 in the *Opt* column next to each secondary file for the report. When done selecting files, press Enter.

Where Can You Find Related Documentation?

For more information about Infinium QY, refer to the following related publications:

Infinium Query Release 2.0 Notes

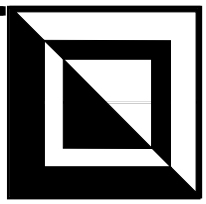
Infinium Query Installing Release 2.0

Infinium Query Administrator's Guide

Infinium Query Guide to Security

Refer also to the Supplemental Materials topic in the About This Course section of Part 1 later in this guide.

Part 1



Overview of Infinium QY

Part 1 provides a basic conceptual framework for learning about and using the Infinium QY application.

Objectives

This course helps you learn:

- The relationship between Infinium QY and Infinium Software databases
- The concepts of database libraries, files, fields, joins, and value lists
- How to identify the names of the libraries, files, and fields you want to access for a particular Infinium Software database application
- How to plan and create online Infinium QY report definitions
- How to modify, print, and view report definitions
- What prerequisites must be met before you can generate your report
- How to generate and print user-defined Infinium QY reports
- How to generate and use the Infinium QY utility reports
- How to release functions that have been locked by the system

Note: This guide does not cover administrative and security supervisory tasks covered elsewhere in the Infinium QY documentation set. Refer to the *Infinium QY Administrator's Guide* and the *Infinium QY Guide to Security* for related topics.

Course Organization

This course uses a lecture format with online demos by the instructor. The course reinforces your understanding and lets you practice what you have learned by including hands-on workshops.

Supplemental Materials

For additional reference information, consult the following:

- Online help

  To access on-line help, press Help. If your keyboard has no Help key, press your locally-defined equivalent, such as Shift Scr|Lock.

- File and field reference information for each database application
- The instructions in Appendix I at the end of this guide
- For administrative and security supervisory users: The Infinium *QY* Administrator's Guide and the Infinium *QY* Security Guide

Course Agenda

About Infinium QY

Designing a Report

Defining and Reviewing a Single-File Report

Creating a Single-File Report Definition
Reviewing Your Report by an Interactive QY
Workshop:
Planning a New Report
Creating the Report Definition
Reviewing Your Report Output

Modifying a Report and Defining a Complex Report

Modifying and Copying Existing Report Definitions
Creating a Complex Report Definition
Workshop:
Planning a Multi-File Report
Creating the Report Definition
Modifying the Report
Copying and Deleting a Report Definition

Generating a Report and Working with Reports

Running a Batch Report
Running a Report Interactively
Displaying, Printing, and Deleting Stored Report Outputs
Printing a Report Detail Report
Releasing System Locks
Workshop:
Display, Print, and Delete Report Outputs
Print and Review a Report Detail Report
Infinium QY Review Exercise

Using the Administrative Functions

(Based on the *Infinium QY Administrator's Guide*)
Maintaining Library, File, and Field Descriptions
Maintaining Security Authorizations
Granting Users Authority for Interactive *QY*

Summary

About Infinium QY

What Is Infinium QY?

Infinium QY is a database query facility you can use to define, create, maintain, and generate query reports for all your Infinium Software database applications. This tool supplements the standard reports provided by those database applications by letting you do the following:

- Design and define customized reports to meet your unique needs
- Preview report formats on your terminal during report definition
- Use the report definitions you enter in Infinium QY to extract and manipulate data from a variety of database files without updating the information in those database files
- Generate the reports either interactively or in batch mode

What Is Infinium QY/X?

Infinium QY/X, also called Infinium QY/Extended, includes the same functionality as Infinium QY and also lets you do the following:

- Generate reports for non-Infinium Software databases
- Define value lists for non-Infinium Software data; for more information about value lists, refer to the *Infinium QY Guide to Security*.

You can use this *Guide to Infinium QY* for both Infinium QY and Infinium QY/X, although the workshops are designed only for Infinium QY.

What Are the Infinium QY Functions?

Infinium QY has six groups of functions, as shown in the following illustration of the Infinium QY main menu:

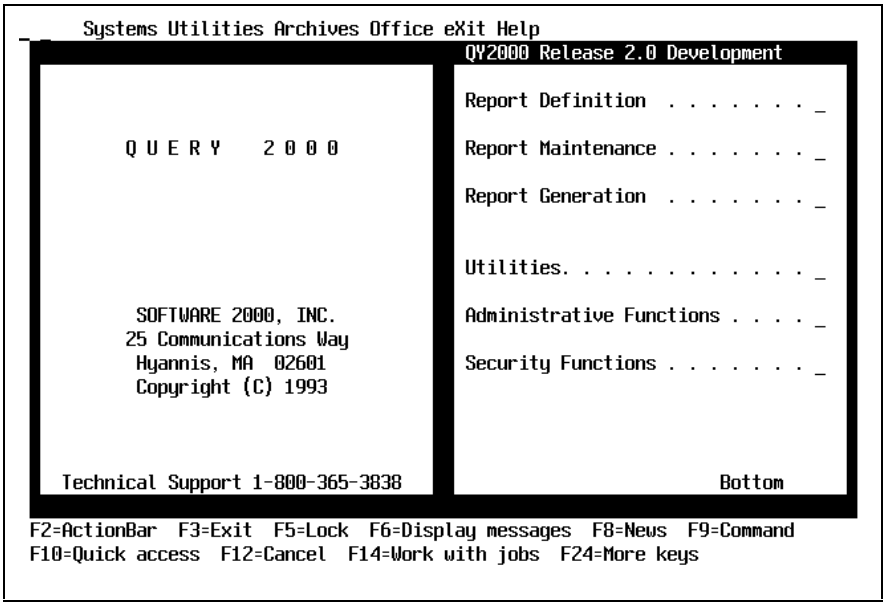


Figure 1-1: Infinium QY main menu

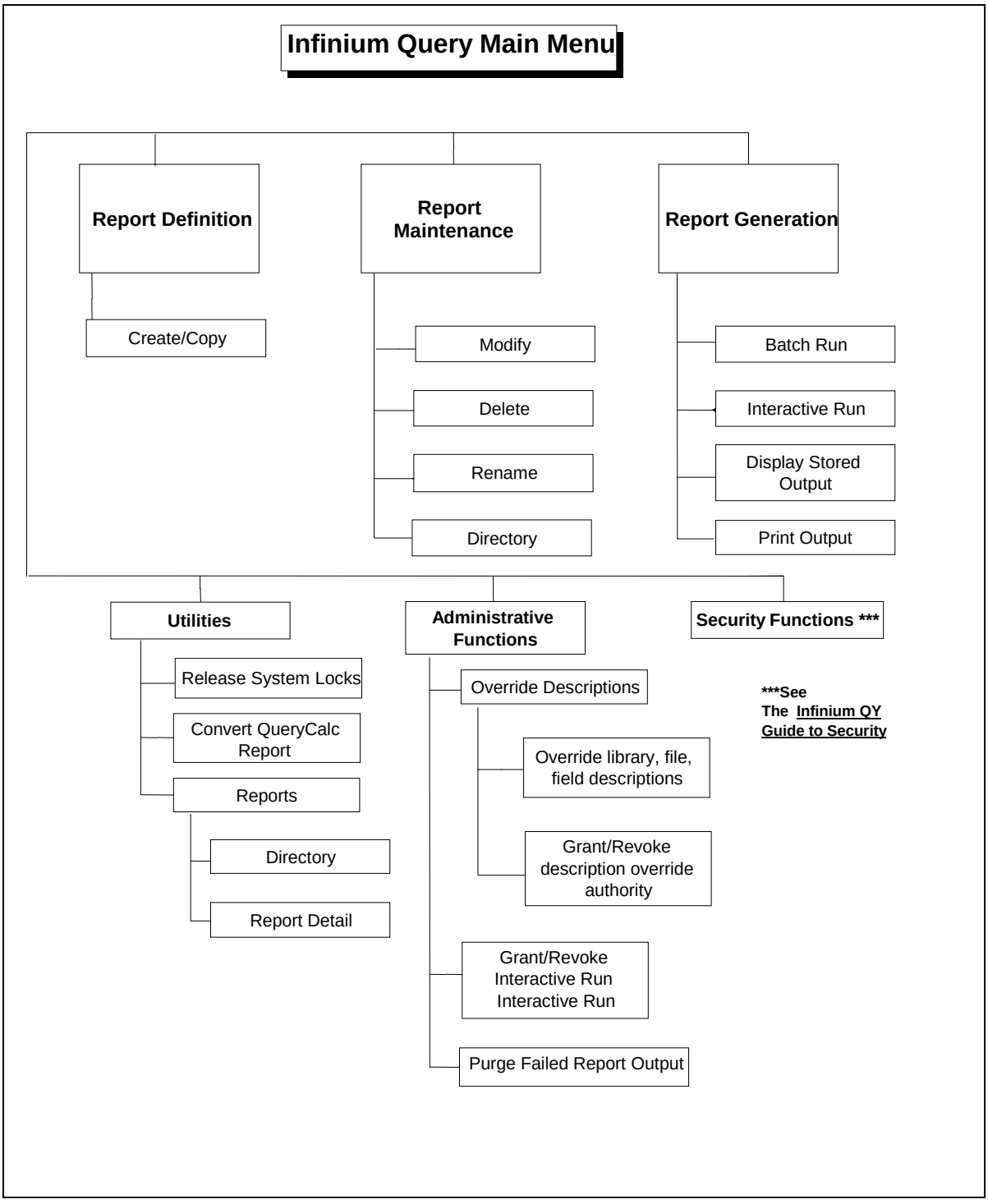
These functions let you

- Define and maintain customized report definitions
- Print a Report Detail report summarizing a report definition
- Generate customized reports in batch mode or interactively, in any of a number of formats, based on specified report definitions
- Display and print directories of report definitions or report outputs and work with certain directories to perform a wide range of tasks
- Perform related utility tasks

Infinium QY provides additional functions for the Infinium QY Administrator and the Infinium QY Security Supervisor. For information about these functions, refer to the following documents:

- The Infinium QY Administrator's Guide
- The Infinium QY Security Guide

The diagram on the following page illustrates the menu paths and functions other than the security functions.



Infinium QY/X *Override Descriptions* also lets you override value list descriptions. Refer to the *Infinium QY Administrator's Guide* for details.

Descriptions of the Infinium QY Functions

The following table summarizes the use of the non-administrative Infinium QY functions.

Area	Option	Use
Report Definition	*Create/Copy*	Use the *Create/Copy* option to create a new report definition from scratch or by copying over an existing definition and modifying the copy.
Report Maintenance	*Modify* *Delete* *Rename* *Directory*	Use the *Modify*, *Delete*, and *Rename* options to edit, delete, or rename an existing report definition. Use the *Directory* option to define and display a customized directory of report definitions or stored report outputs. You can then select a listed report definition or output for a wide range of tasks including displaying, running, printing, and so forth.
Report Generation	*Batch Run* *Interactive Run* *Display Stored Output* *Print Output*	Use the *Batch Run* or *Interactive Run* option to generate report output by running a report definition in batch mode or interactively. Use the *Display Stored Output* and *Print Output* options to display or print previously stored report output. **Note:** You can also display and print report output through the *Report Maintenance* menu's *Directory* function.
Utilities	*Release System Locks* *Convert QYCalc Report* *Reports* *Directory* *Report Detail*	Use the *Release System Locks* option to release a lock on a function and make the function available for use. Use the *Convert Query Calc Report* option to convert a QY Calc report to Infinium QY. QueryCalc was the Infinium Software reporting tool replaced by Infinium QY. Use Reports to do the following: Print a user-specified directory of report definitions or report outputs Print a Report Detail report with information about a report definition, for use in troubleshooting reports

Terminology and Concepts

These terms and concepts are useful for understanding Infinium *QY*.

Library

A database library is a defined data storage area. Each Infinium Software database application stores information in its own database library.

Example: HRDBFA is the Infinium HR database library.

File

A database file is a defined collection of related data fields within a library. Each Infinium Software database library has a series of data files.

Example: PRPMS is the Infinium HR Employee Root Master File containing the basic information about each employee.

Field

A single data element within a file. Each Infinium Software data file contains a series of fields.

Example: PRCNM is the Infinium HR Employee Root Master File field containing the employee's full name.

Record

A single set of a file's fields and the information recorded in those fields.

Example: The Infinium HR/PY Employee Root Master File has a separate record containing each of the file's fields for each employee.

Joining

Linking records in separate files through a field shared by both files, in order to include information from multiple files in a single report.

Example: You can join the Infinium HR/PY Employee Root Master File and the Infinium HR/PY Employee Dependents File through the *Employee Number* and *Employer Number* fields.

The report has an employee's data from the Master File and also data from any Dependents File record with that same employee number.

Forced Joins

Certain joins between files are required by Infinium QY under some circumstances. Infinium QY forces these joins to ensure that security rules associated with certain Infinium HR and Infinium OH files are correctly applied during report generation.

Report Definition

The user-defined Infinium QY specifications for a customized report, including definition of the report's contents and format. The definition can be run and rerun against the specified database as often as desired.

Report Output

The results of a single running of a report definition against a database.

Primary File and Secondary Files

The file that is the primary target of a Infinium QY report query, and additional files from which the report may take additional information.

Infinium QY reads every record in the primary file. Infinium QY reads only those secondary file records that are joined to a primary file record through a matching value in the specified join field.

Example: A report definition lists the Infinium HR/PY Employee Root Master File as the primary file and lists the Dependents File as a secondary file. The definition joins the two files through the *Employee Number* field.

When you run the report definition, Infinium QY finds a record for employee 33333 in the Employee Root Master File. Then Infinium QY does the following:

1. Checks the Dependents File for a record with Employee Number 33333.
2. If there is a record with that number, reads that record to include information for this employee's entry in the report output.
3. Otherwise does not read any Dependents File records for this entry.

Security Conversion

Conversion of a database application's security information from that application's security records to Infinium QY security records.

Each Infinium Software database application has security restrictions that control which user is allowed access to what information in the database. Infinium QY does not let you query a database until your Infinium QY Security Supervisor has converted that database application's security.

This ensures that the security restrictions are applied when the user accesses the database information through Infinium QY reports.

Authority Level

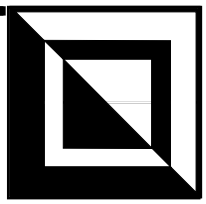
An authority level is a number from 0 and 9 that specifies the following:

- For a user, the level of security assigned to the user
- For a database application library, file, or field, or a Infinium QY report definition, the level of security assigned to the item

The system lets you access only items that have the same authority level number or a higher authority level number than your authority level number. Example: If your level is 5, you can access items with levels 5 through 9.

Download Transfer data, such as report output, to a personal computer (PC).

Part 2



Designing a Report

Part 2 of this guide provides an introduction to designing a Infinium QY report, including performing the following tasks.

Topic	Page
Identifying the Information You Need	2-2
Using the Infinium QY Worksheets	2-3

Note: The "Using the Infinium QY Worksheets" section also provides reference information on interpreting library, file, and field names for most Infinium Software database applications.

Objectives

This part of the guide helps you learn to do the following:

- Identify the questions to ask yourself when designing a report
- Use two worksheets to document your answers to those questions
  - The Report Components Worksheet
  - The Library, File, and Field Consolidation Worksheet

Identifying the Information You Need

The first step in designing a report is to identify the information you need. The answer to this question lets you decide the answers to more detailed questions about the contents and format of the report.

The following table lists questions to ask yourself and examples of the answers you can have in a basic Infinium QY report.

	Question	Source of Answer	Example of Answer
1	What is the purpose of the report?	Your business need	Reference list of employees on Cape Cod
2	What information do you need in the report?	Your business need and intended use of the report	Employee's first name Employee's address
3	What report title will be clearest to report users?	Knowledge of report's purpose and the users	Employee Listing for Cape Cod
4	What format will make the report easiest to use? How many columns? What column headings? What fields in the columns?	Knowledge of The report's purpose The report's users The available data	Five columns, using these headings Employee's First Name Street City State ZipCode

The next task is to record your answers on one or both of the Infinium QY worksheets, adding information such as the library names, file names, and field names you need to define the report in Infinium QY.

Using the Infinium QY Worksheets

The Infinium QY worksheets help you do the following:

- Record the facts you need to define the report in Infinium QY
- Visualize the report output

There are two worksheets:

- The Report Components Worksheet
- The Library, File, and Field Consolidation Worksheet

The following pages illustrate these worksheets and describe their use.

Note: Appendix A at the end of this guide provides blank worksheets you can photocopy for future use.

Understanding the Report Components Worksheet

This page illustrates a single-file report worksheet. **Note:** Information you fill in is shown in italics like *this* in all this guide's worksheets.

Each item in the left hand column of the Report Components Worksheet represents one component of a Infinium QY report definition. The following pages provide summary explanations of these components.

Report Title: Employee Listing for Cape Cod						**(Report Name: EMPLCAPE)**
	Column 1	**Column 2**	**Column 3**	**Column 4**	**Column 5**	**Column _**
Column Heading	*Employee's First Name*	*Street*	*City*	*State*	*ZipCode*	

Report Title: Employee Listing for Cape Cod						(Report Name: EMPLCAPE)
	Column 1	**Column 2**	**Column 3**	**Column 4**	**Column 5**	**Column _**
Field Name	*Common Name PRCOMN*	*Address-Street Line 1 PRSTR1*	*Address - City PRCTY1*	*Address - State/Prov PRSTA1*	*Address - Postal Code PRZIP1*	
Libraries	*TRAINQYHR*					
File	*Employee Root Master File (PRPMS)*					
Derived Column						
Calculations						
Result String						
Format Option						
Selection Criteria					*Zip = 025* or 026**	
Group/Sort	*Sort by name within city*		*Group by City*			
Join Column						

Basic Components: Title through File

The preceding sample contains values for the basic components of any report design. Use these first five worksheet components as follows.

Report Title

Write the title of the report exactly as it should be printed on the report.

If you plan to keep the worksheet for future reference, you can also note here the name (up to eight characters in length) you plan to use for the report definition, also called the report name, such as EMPLCAPE.

Column Heading

Write each column heading exactly as it should be printed on the report. Each column on the worksheet represents one column on the report.

Note: The column heading does not need to match the field name in the next component. Use whatever heading is clearest to the report user.

Field Name

Write the name of the field whose data is to be printed in this column.

Note: If you do not know the field name, pencil in the field's name as the system displays it to database application users, or whatever identifies the field in your mind, for now. During the on-line report definition process described in Part 3 of this guide, Infinium QY displays a list of field names for each file you select, with descriptions of the fields so that you can make the appropriate selections.

Library

Write the name of the library that contains the file or files and fields.

Note: If you do not know the name of the library, pencil in a description such as Infinium HR/PY database library.

During the definition process described in Part 3 of this guide, Infinium QY displays a list of the libraries you are authorized to query, such as HRDBFA, with descriptions identifying the libraries. You can also consult your Infinium QY administrator for library names and to ensure that you are authorized to access the library or libraries you need.

File

For each column, write the name of the file containing the field you listed for that column in the Field Name component of the report.

Note: If you do not know the exact file name, pencil in a description such as employee master file. During the online definition process, Infinium QY displays a list of the files in the library or libraries you selected, with descriptions of the files so that you can make the appropriate selection or selections.

Refer also to Appendices B through J at the end of this guide and to the File/Field Descriptions document for the relevant database application.

Complex Report Components

The following component descriptions and the illustrations introduce the use of the worksheet for complex reports. Refer to Part 4 for more information about these components.

Derived Column

A derived column contains data that does not exist in the database in the format you need. Infinium QY creates the contents of the column on the printed report through concatenation (stringing two or more values together) or calculations based on the data in selected fields.

Write here any derived column results you want for the report. You can use derived columns for temporary storage of data that is not printed on the final report, or for data to be printed on the report.

Calculations

Write here any calculations you plan to have Infinium QY perform on the data in the designated column to determine the value described in the derived column component section of the worksheet.

Result String

Write here the values to be concatenated, if your derived column is to be derived from concatenation.

Format Option

Write here any format requirements to be applied to the data in any column for the final report output, such as right justifying the values, converting a date to a different format, or printing a total for numeric values in the column.

Selection Criteria

Write here any selection criteria needed to limit the data included in the report. For example, you can use selection criteria to include only records that contain values equal to the values you specify here.

Group and Sort

Write here any special grouping and sorting requirements for the information on the report. This lets you organize the information clearly, such as grouping employees by city and sorting the employee entries alphabetically within those city groups.

Grouping also lets you request totals at the end of each group section of the report. For details about grouping entries on a report, refer to Part 4.

Join Column

When you use more than one file for a report, you must specify one or more fields that are shared by both files. A field that occurs in two different files is called a join.

Write here the field or fields to be used for joining the files. Refer to Part 4 of this guide for more information about using joins and forced joins.

Forced joins are joins Infinium QY requires you to use if you are using certain Infinium HR or Infinium OH files. These forced joins are required for accurately applying security.

Sample Components Worksheet for Complex Report (Sheet 1 of 2)

These worksheets illustrate a complex report definition that includes:

- Data from two separate files and non-printing fields used as file joins
- Non-printing calculated data for an intermediate step in a calculation and the final calculated result to be printed on the report

Sheet 1 describes columns 1 – 6. Sheet 2 describes the other columns.

Report Title:	***Employee List with Minor Dependents***					***(EMPLDEP)***
	Column 1	**Column 2**	**Column 3**	**Column 4**	**Column 5**	**Column 6**
Column Heading	*Employee Name*	*Employee City*	*Salary Range*	*Dependent's Name*	*Age*	*Depndnt DOB*
Field Name	*Common Name PRCOMN*	*Address - City PRCTY1*	*Salary Range PRSRG*	*Dependent Name DPDNM*	*Dependent Age DPDAG*	*Date Born DPDBH*
Libraries	*TRAINQYHR*	*same*	*same*	*same*	*same*	*same*
File	*Empl Root Master PRPMS*	*Empl Root Master PRPMS*	*Empl Root Master PRPMS*	*Employee Dependent PEPDP*	*Employee Dependent PEPDP*	*Employee Dependent PEPDP*
Derived Column						
Calculations						
Result String						
Format Option			*Rt justify*		*Rt justify*	*Rt justify; convert dt*
Selection Criteria						*After 01/01/74*
Group/Sort	*Sort 2, alpha-betical*	*Group by city; total*				*Sort 3, oldest 1st*
Join Column						

Sample Components Worksheet for Complex Report (Sheet 2 of 2)

Report Title:	***Employee List with Minor Dependents***			***(EMPLDEP)***		
	Column 7	**Column 8**	**Column 9**	**Column 10**	**Column __**	**Column __**
Column Heading	*Employee # Dep File - not printing*	*Employee # Master File not printing*	*Intermediate result - not printing*	*Yrs Left*		
Field Name	*Empl# (Dep File) DPEN*	*Empl# (Master File) PREN*				
Libraries	*same*	*same*				
File	*Employee Dependent PEPDP*	*Employee Root Master PRPMS*				
Derived Column			*Difference between dependent age and 21*	*Convert negative Col 9 result to positive #*		
Calculations			*Subtract 21 from Col 5*	*Multiply Col 9 result by -1*		
Result String						
Format Option	*Don't print*	*Don't print*	*Don't Print*	*Rt justify*		
Selection Criteria						
Group/Sort						
Join Column	*Empl # in Dep File*	*Empl # in Master File*				

Understanding the Library, File, and Field Consolidation Worksheet

The Library, File, and Field Consolidation Worksheet lets you summarize data about the libraries, files, and fields for your report. The worksheet also lets you note the fields to be used to join the files.

Note: For every report definition, Infinium QY requires you to identify the primary file. Infinium QY reads every record in the primary file to find matching records. Infinium QY reads only the records in secondary files that match the join value in the corresponding primary file record.

See Part 4 for more information about using and joining files.

Report Title: Employee Listing with Minor Dependents		**(EMPLDEP)**
Library: TRAINQYHR	**Library: Same**	**Library:**
Primary File: *PRPMS*	Secondary File: *PEPDP*	Secondary File:
Fields:	Fields:	Fields:
CommonName PRCOMN	*DepName DPDNM*	
City PRCTY1	*DepAge DPDAG*	
SalaryRange PRSRG	*DepDOB DPDBH*	
Employee# PREN	*Employee# DPEN*	
Join Fields:	Join Fields:	Join Fields:
Employee# PREN	*Employee# DPEN*	

Interpreting the Format of Library, File and Field Names

The following tips help you become familiar with using the library, file, and field names that apply to your application.

Database Library Names

Database library names typically follow these conventions:

- Start with a two-character system designator, such as HR for Infinium Human Resources and GL for Infinium General Ledger
- Follow the system designator with DBFA

Note: Your local library names may differ from this default standard if your local administrator renames the libraries shipped by Infinium Software.

Database File Names

Database file names typically follow these conventions:

- Start with a two-character product suite or system designator, such as HR for Infinium Human Resources or GL for Infinium General Ledger
- Have P as the third character, meaning physical file; data is stored on your system in physical files
- Have a unique identifier in the last two positions

Example: HRPDP is the Infinium HR system's Dependents File within Infinium HR/PY.

Note: Because all database physical files within a single system typically start with the same three characters, these files are sometimes informally called by their last two characters, such as DP file for the PEPDP file.

Field Names

Database field names typically follow these conventions:

- Start with the last two characters of their file's name, such as DP
- Have a unique identifier within their file in the remaining positions

Examples: DPDAG is *d*ependent's *ag*e; DPDNM is *d*ependent's *nam*e.

The following page provides a reference table of product suite and system designators for Infinium Software database applications.

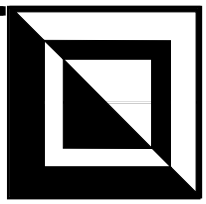
Product Suite and System Designators

Designator	Product Suite or System	System
AR	Infinium Accounts Receivable	
EM	Infinium Occupational Health	
FA	Infinium Fixed Assets	
GL	Infinium General Ledger	
HR/PY	Infinium Human Resources/Payroll	
IC	Infinium Materials Management Suite	Infinium Inventory Control
JP	Infinium Materials Management Suite	Infinium Journal Processor
OP	Infinium Materials Management Suite	Infinium Order Processing
HR	Infinium Human Resources Suite	Infinium Human Resources
PL	Infinium Payables Ledger	
PM	Infinium Materials Management Suite	Infinium Purchase Management
HR/PY	Infinium Human Resources Suite For exceptions, see Note after table	Infinium Human Resources and Payroll
PY	Infinium Human Resources Suite	Infinium Payroll

Note: A handful of physical files do not use these system designators. Some of those files are Infinium Materials Management Inventory Control files that start with the prefix PRD for product.

Notes

Part 3



Defining and Reviewing a Single-File Report

Part 3 describes the process of creating a single-file report definition. A single-file report is a report that contains fields from only one database file.

The definition of a single-file report helps you learn the basic screen flow and screen procedures for report definition and maintenance.

Part 4 builds on Part 3 by adding details about copying and modifying existing reports and performing additional steps required for the definition of complex reports. Part 4 also provides additional reference details to answer questions you may have when using Infinium QY on the job.

Part 3 covers the following tasks.

Topic	Page
Creating a Single-File Report Definition	3-3
Reviewing Your Report by an Interactive QY	3-24
Hands-on Workshop: Creating Your Own Report	3-27

Objectives

This part of the guide helps you learn the steps for creating, running, and checking the output from a single-file Infinium QY report definition. The walk-through helps you learn to do the following:

- Set report controls
- Select the database library, file, and fields to be used for the report
- Specify the format of the report columns
- Define selection criteria for entries to include in the report output
- Define how to group and sort the information in the report output
- Run the report interactively and check the output

The workshop at the end of Part 3 lets you practice these tasks.

Creating a Single-File Report Definition

An Infinium QY report definition contains specifications for the report, such as the following:

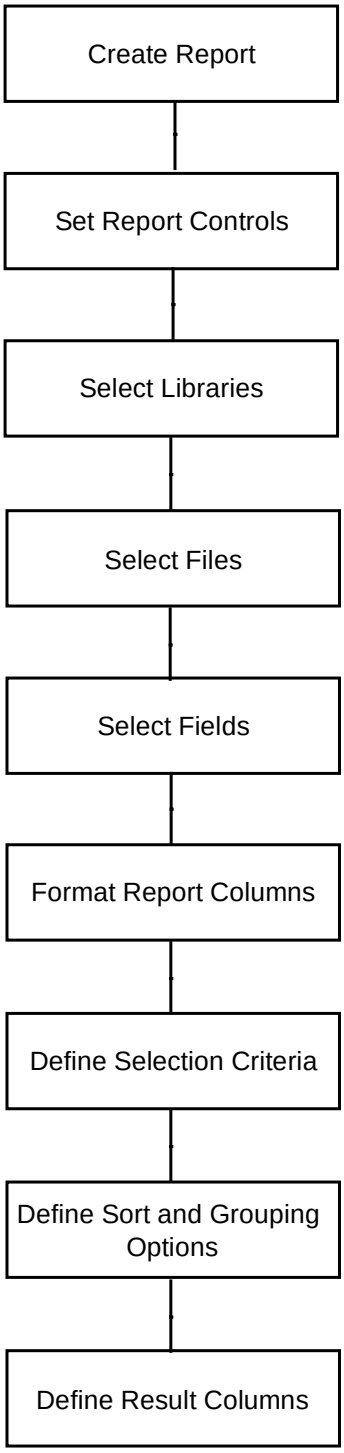
- The data fields to be included in the report
- How the data is to be laid out (formatted) on the report page
- Selection criteria for including entries in the report
- How the entries are to be grouped and sorted on the report

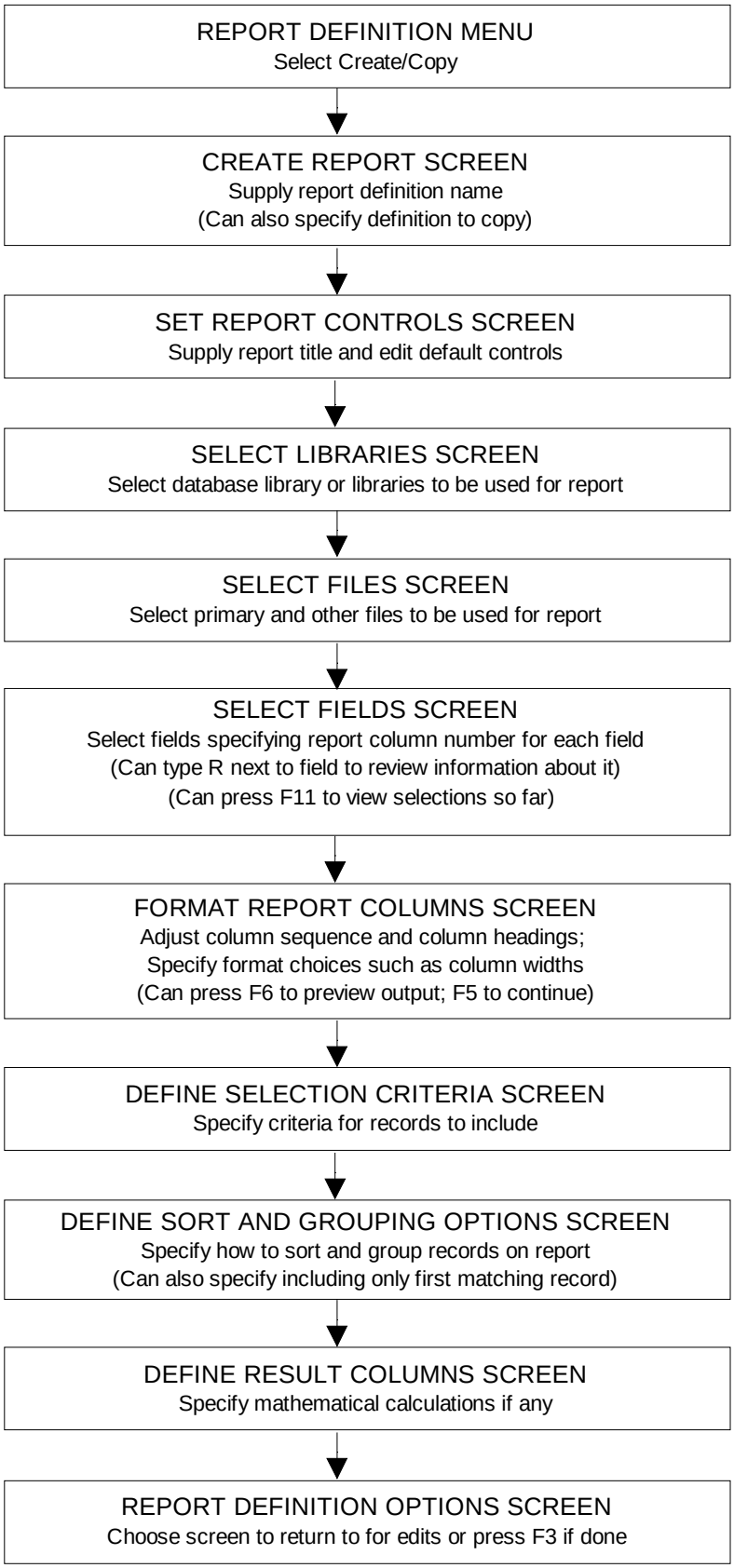
When you select the *Create/Copy* option from the *Report Definition* menu, Infinium QY walks you through all the screens you need to build a definition.

The diagrams on the following two pages provide a road map of the report definition process by summarizing the following:

- The basic *Create/Copy* function screen flow
- The basic procedures to be followed at each of these screens

Screen Flow Diagram





QuickAccess:
QYCREATE

Completing the Worksheet

The following worksheet summarizes the plan for a single-file report.

Note: The system provides lists of libraries, files, and fields for you to select from during the definition process. The system also lets you review libraries to check the files in those libraries, and review files to check the fields in those files. Refer also to Appendices B through J.

If you do not know a file or field name, pencil in a description.

Report Title: Employee Listing for Cape Cod						
	Column 1	**Column 2**	**Column 3**	**Column 4**	**Column 5**	**Column 6**
Column Heading	*Employee's First Name*	*Street*	*City*	*State*	*ZipCode*	
Field Name	*Common Name PRCOMN*	*Address-Street Line 1 PRSTR1*	*Address - City PRCTY1*	*Address - State/Prov PRSTA1*	*Address - Postal Code PRZIP1*	
Libraries	*TRAINQYHR*	*same*	*same*	*same*	*same*	
File	*Employee Root Master File PRPMS*	*same*	*same*	*same*	*same*	
Derived Column						
Calculations						
Result String						
Format Option						
Selection Criteria					*Zip = 025* or 026**	
Group/Sort	*Secondary Sort*		*Primary Sort*			
Join Column						

Naming the Report Definition

1. At the Infinium QY main menu select *Report Definition*.
2. Select *Create/Copy*. The system displays the Create Report screen.

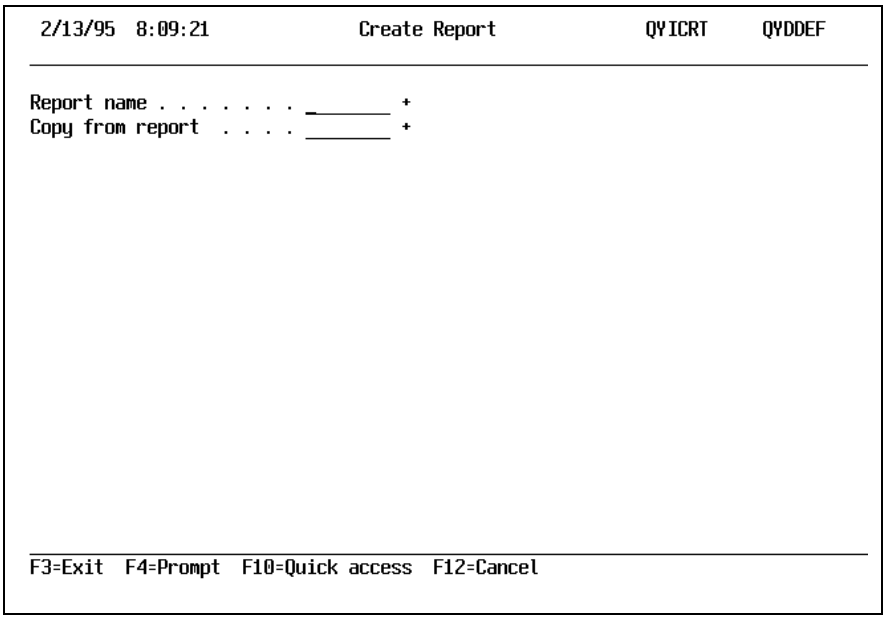


Figure 3-1: Create Report screen

3. Type a name for the report in the *Report name* field.

   You can use up to eight alphanumeric characters for the name. You must start the name with a letter.

4. Press Enter to continue to the next screen.

Note: You can exit the basic Create/Copy procedure at any of the Create/Copy screens by pressing F3. If you press F3, the system displays the Report Definitions Options screen, where you can press F3 to exit the *Copy/Create* function and save your current work.

To resume work on the definition, select *Modify* from the *Report Maintenance* menu, type the report's name, and press Enter to display the Report Definition Options screen. Then select *Define All* at the Report Definition Options screen.

Setting the Report Controls

When you press Enter at the Create Report screen, the system displays the Set Report Controls screen.

```
 5/10/95 14:58:59          Set Report Controls          QYICTL$    QYDDEF

Report name . . . . . : EMPLCAPE
Report title. . . . . . Employee Listing for Cape Cod
Report owner. . . . . . QY2000
Last update . . . . . : New Report

Quick select window . . . 0   (1=Yes  0=No)

Report control                      Option
Line spacing  . . . . . . . . . . . . 1   (1,2,3)
Summary report only . . . . . . . . . 0   (1=Yes  0=No)
Modify by owner only  . . . . . . . . 1   (1=Yes  0=No)
Generate by owner only  . . . . . . . 1   (1=Yes  0=No)
Restrict access to level  . . . . . . 0   (1-9)
Store output on batch run . . . . . . 0   (1=Yes  0=No)
Printer Control name  . . . . . . . . QYTOUTP
Interactive record limit  . . . . . .  10   (1-1000)
User authority level  . . . . . . . . : 0


F3=Exit  F10=Quick access
```

Figure 3-2: Set Report Controls screen

The system displays the report definition name in the *Report name* field.

5. Use the information below to fill in the fields on this screen.

   Report title

   Type the title to be printed at the top of the report.

   Report owner

   Type the user profile ID of the owner of this definition.

Note: The default **1** in the *Modify by owner only* field later on this screen means that only the owner you specify can edit or copy this definition. The default **1** in the *Generate by owner only* field later on this screen means that only the owner you specify can run this report.

7. Review and edit the defaults in the following fields

   Quick select window

   The Quick select window lets advanced users perform short-cut steps in the *Create/Copy* and *Modify* functions. Refer to Part 4 for details.

Line spacing

Type **1**, **2**, or **3** for single-spaced, double-spaced, or triple-spaced output.

Summary report only

Keep **0** in the *Summary report only* field. See Part 4 for details on generating a report with group totals rather than line-by-line details.

Modify by owner only Generate by owner only

Refer to the note under the *Report owner* field earlier in these field descriptions. Type **0** in either or both of these *by owner only* fields if you want to allow others to modify or generate the report or both.

Restrict access to level

Used to control access to this report when either *Modify by owner only* or *Generate by owner only* is **0**. Refer to Part 4 for details.

Note: The default value is the report definition creator's authority level.

Store output on batch run

Type **1** in the *Store output on batch run* field if you want to store the output from a batch run of this report rather than print the output. You can view and print stored output later, as explained in Part 4.

The system assigns sequential numbers to copies of the same report. You can store the output from up to 99 runs of the same report definition.

Printer Control name

This field specifies the printer control that contains specifications for how and where to print the report output. The default is **QYTOUTP**.

Refer to Part 5 for more information about printer controls.

Interactive record limit

This field lets you limit the number of matching records the system includes in the report before stopping an interactive run. This helps you do the following:

- Avoid tying up your terminal with longer-than-expected runs
- Run a short sample of a report's output interactively

You can set the limit to any number between **1** and **1000**.
The default value is **1000**. When testing definitions, you may want to type **20** in this field to restrict the report generation process and

output to the first 20 records the system finds for inclusion in the report.

User authority level

The system displays your security level in this field for your reference. See Part 4 for details.

7. Press Enter to accept the default controls on the rest of this screen and to continue to the Select Library screen

Selecting a Database by Selecting Its Library

When you press Enter at the Set Report Controls screen, the system displays the Select Libraries screen.

```
 5/10/95 14:59:53            Select Libraries           QYILIB$    QYDDEF
_________________________________________________________________________

Report name . . . . . . : EMPLCAPE         Position to . . . . .   _________

Type any character next to library name to select, press Enter.

Sel  Library     Description
 _   FADBFA070   FA2000 Data Base PF
 _   GLDBFA090   General Ledger 2000 release 9.0 Database Library
 _   HRDBFA      HR2000 Data Base PF
 _   HRDBFA073   HR2000 Data Base PF
 X   TRAINQYHR   QY Training lib - HR files

_________________________________________________________________________
F3=Exit  F9=Previous  F10=Quick access  F17=Top
```

Figure 3-3: Select Libraries screen

This screen lets you select the library or libraries that contain the files with the data you need for the report. The system displays a list of all the libraries you are authorized to access. For more information about authority levels, refer to the Terminology and Concepts section in Part 1 of this guide.

Selecting a library lets you access the files in that library. You can select up to 25 libraries, in any order. A single-file report uses only one library.

1. If the list is long, you can do one of the following to find the library:

If you know the name of the library, type that name in the *Position to* field and press Enter. The system shifts the display so that the library you specified is included in the display.

Otherwise, press PgDn to page through the list.

2. When you find the library, type any character in the *Sel* field next to that library.
3. When done selecting the library or libraries, press Enter to continue to the Select Files screen.

Selecting a Data File or Files

When you press Enter at the Select Libraries screen, the system displays the Select Files screen.

```
 5/10/95 15:04:15            Select Files                QYITBL$    QYDDEF

Report name . . . . . : EMPLCAPE         Position to . . . . .  _________

Type P for a primary file, 1 through 24 for secondary files, press Enter.

  P=Primary file   R=Review file

Opt  File        Description
     TRAINQYHR   QY Training lib - HR files
     ==========  ================================================
__   PEPDP       Employee Dependents File
__   PEPMS       Employee Personnel Master File
__   PEPTR       Employee Transactions File
__   PRPJB       Job Controls File                          2880
P_   PRPMS       Employee Root Master File
__   PYPCL       Employee Check Ledger File
__   PYPDE       Employee Deductions File                    7.0
__   PYPDL       Employee Deductions Ledger File                  +

F3=Exit  F9=Previous  F10=Quick access  F11=View selections  F17=Top
```

Figure 3-4: Select Files screen

The system lists the files for the library or libraries you selected at the preceding screen. If the list is long, you can use the *Position to* field or press PgDn to to find the files you want.

Note: You can review a file by typing Enter in the *Opt* field next to that file. The system displays a list of the file's fields, their descriptions, and their lengths. Press F12 to return to the Select Files screen.

Selecting the Primary File

1. Select one file as the primary file by typing **P** in the *Opt* field next to that file. When you generate the report, the system reads every

record in the primary file and selects all records that match the selection criteria you specify later in this definition process.

Selecting Secondary Files

2. For complex reports, you can select up to another 24 files, by typing numbers in the Opt column next to the desired files. You do not need to number the secondary files consecutively.

   Refer to Part 4 for more information about using multiple files.

3. When done, press Enter to continue to the Select Fields screen.

Selecting Data Fields for the Report's Contents

When you press Enter at the Select Files screen, the system displays the Select Fields screen.

```
 5/10/95 15:08:11              Select Fields              QYICOL$    QYDDEF

Report name . . . . . . : EMPLCAPE         Position to . . . . .  _________

Type column sequence number next to each field to select, press Enter.

  (1-50)=Select field   R=Review field

                                                                      Data
Sel  Field       Description                          Length  Decimals  type
 __  PRBRT       BASE PAY RATE                          10        4     Num
 __  PRBRTF      BASE RATE FREQUENCY                     2              Char
 __  PRCKNM      NAME - CHECK NAME                      39              Char
 __  PRCLA       CLASS                                   5              Char
 __  PRCLN       CLOCK NUMBER                            6        0     Num
 __  PRCNM       NAME - COMPLETE                        39              Char
 __  PRCNTY      COUNTY                                  5              Char
 01  PRCOMN      COMMON NAME                            20              Char
 __  PRCOMP      COMP RATIO                              7        4     Num
 __  PRCSFT      SHIFT CODE                              5              Char +

F2=Result columns  F3=Exit  F9=Previous  F24=More keys
```

Figure 3-5: Select Fields screen

For each file you selected at the preceding screen, the system lists the name of the file and the fields included in that file.

Note: Type Enter next to a field to review information about the field. Press F12 to return to the Select Fields screen.

1. Select the fields to be used for this report in numerical order by typing **1** next to the field to be used for the first column, **2** next to the field to be used for the second column, and so forth. You can select up to 50 fields.

   Also type numbers to select any fields that you need for calculations.

Note: You can change the order of columns, indicate that a column is not to be printed on the report, and specify calculations and concatenations of data values, at other screens later in this process.

2. Press F11 to view a list of your selections in a Selected Fields panel. Press F12 to return to the Select Fields screen.

3. When done selecting fields, press Enter to continue to the Format Report Columns screen.

Formatting the Report Columns

When you press Enter at the Select Fields screen, the system displays the Format Report Columns screen.

```
 5/10/95 15:10:49          Format Report Columns          QYIFMT$    QYDDEF

Report name . . . . . : EMPLCAPE                  Report width . . . :  101

Type column headings, and format options, press Enter. (* = Result column)
                                                  _____ Format options _____
 Col# Column heading                      Start  Len  Dec  Skip  Print  Edit
  01  Employee's                           1     20         2     1      0
      First Name
  02  Street_                              23    30         2     1      0

  03  ADDRESS - CITY                       55    30         2     1      0

  04  ADDRESS - STATE/PROV                 87     3         2     1      0

  05  ADDRESS - POSTAL CODE                92    10         2     1      0


F2=Result columns  F3=Exit  F5=Continue  F6=Preview  F24=More keys
```

Figure 3-6: Format Report Columns screen

The system displays a list of the columns you specified at the Select Fields screen. Each field you selected is listed as a column. The columns are numbered in the order in which you numbered the fields.

This screen lets you specify the structure and format of the report.

An explanation of the following uses of the Format Report Columns screen follows.

- Editing the displayed format fields
- Editing additional format fields at a pop-up window

- Re-displaying an updated Format Report Columns screen
- Checking the column and report widths
- Previewing the report output format
- The difference between pressing Enter and pressing F5 on this screen

Editing the Displayed Format Fields

Use the following information to edit the displayed format fields:

Col #

The output has Column 1 on the left, and the other columns in numeric order to the right. You can edit this field for the following purposes:

Task	Action
To change the order of columns	Renumber the columns. **Note:** You can leave gaps in the sequence.
To delete a column	Blank out the number for that column. **Note:** This is the only way to delete a calculated column. You can delete a regular field-specific column by blanking out the number either here or at the Select Fields screen.

Column heading

The default column heading is the field's description. Edit this value to customize the heading to be printed on the report for this column.

You can use one or two lines for the heading.

Note: Changes here affect only the report output. They do not affect the field descriptions in the database file.

Start

The *Start* field tells you the character position where this column begins in the report output. The system adjusts the *Start* display as indicated later when you have made edits to the *Len, Dec,* or *Skip* fields.

Len

The *Len* field tells you how many characters wide the column is. If you edit this field, ensure that the number you type allows for the following:

The width of the column heading (or edit the column heading to fit)

The longest value the system might find or total for this field

If the system cannot print a whole numeric value in a column, the system uses an overflow string for the value, like this: ********

Dec

The *Dec* field specifies the number of decimal positions to use in a numeric column. This field is not available for alphanumeric values.

Skip

The *Skip* field specifies the number of blank spaces between columns. The default is **2**. You can edit this field to add blank space to a format.

Print

The *Print* field specifies one of the following.

Value	Meaning
1	Print this column on the report output.
0	Omit this column from the report output. **Note:** Type **0** for fields you included to be used only as the basis for calculations or other derived values.

Edit

The *Edit* field lets you use additional format fields.

Editing Additional Format Fields

If you typed **1** in the *Edit* field for any column, the system displays a Column Edit Options pop-up window with additional format fields.

The window's fields vary depending on whether this column is numeric or alphanumeric (using both letters and numbers). See Part 4 for details. Press F12 to return to the Format Report Columns screen.

Re-Displaying the Updated Screen

If you edited the *Col #*, *Len*, *Dec*, or *Skip* fields, press Enter to refresh the Format Report Columns screen.

Refreshing the display also updates the *Start* and *Report width* field values.

Checking the Column and Report Widths

After refreshing the Format Report Columns screen display, ensure the following:

- All columns are wide enough to include the largest possible value.

If a numeric column is too small, the report output has the overflow symbol ********. If an alphanumeric column is too small, the report output truncates characters that do not fit.

- The report is no more than 255 characters wide, including the total of the column widths for printed columns plus the total number of skipped spaces, as indicated in the *Report width* field at the top right of the Format Report Columns screen.

Previewing the Report Output Format

To preview the format of your report, press F6 at the Format Report Columns screen. The system displays the Preview Report Output panel.

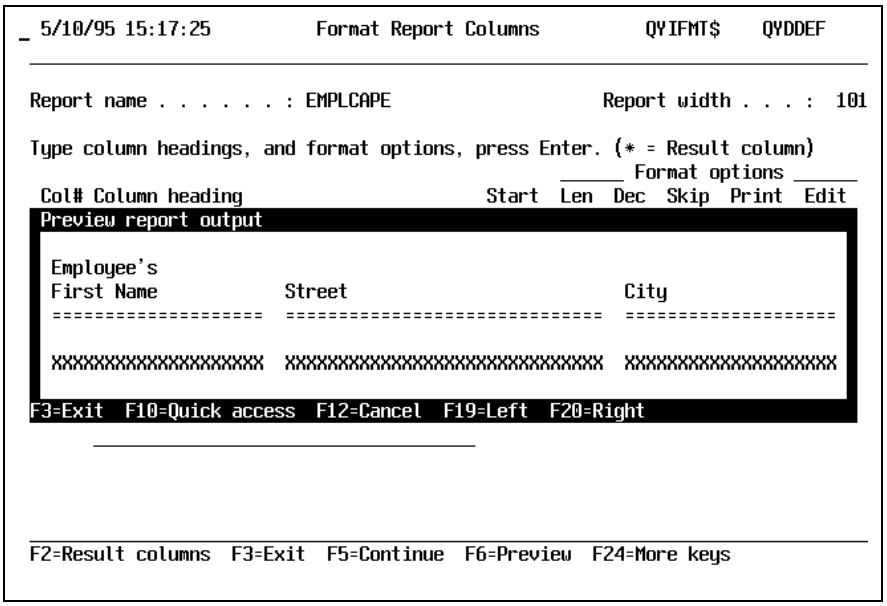


Figure 3-7: Preview Report Output panel

This panel displays about 70 characters of the report at a time. Press F19 and F20 to shift the display horizontally left and right.

When done previewing the format, press F12 to return to the Format Report Columns screen. Then do one of the following:

Pressing Enter and Pressing F5

- Edit the data to correct the format, and repeat the preview
- Press F5 to continue to the Define Selection Criteria screen

Caution: At most of the report definition screens in the Create/Copy sequence, pressing Enter takes you to the next screen in the sequence.

The Format Report Columns screen differs from the others in that:

- Pressing Enter just refreshes the display of this screen.
- You must press F5 to continue to the next screen in the sequence.

Defining Selection Criteria for the Report

When you press F5 at the Format Report Columns screen, the system displays the Define Selection Criteria screen.

```
 5/10/95 15:18:49        Define Selection Criteria        QYICRI$    QYDDEF
_____________________________________________________________________________

Report name . . . . . . : EMPLCAPE

Type test, comparison value or column, press Enter.  More: 1=Yes, 0=No.

Col#  Column heading             Test            Value                Col#  More
 01   Employee's                  __  ________________________________  __     0
      First Name
 02   Street                      __  ________________________________  __     0

 03   City                        __  ________________________________  __     0

 04   State                       __  ________________________________  __     0

 05   ZipCode                     EQ  025*________________________________  __     0




_____________________________________________________________________________
F3=Exit  F6=Date entry  F8=Quick select  F9=Previous  F24=More keys
```

Figure 3-8: Define Selection Criteria screen

Use this screen to specify which records the system is to select for inclusion in the report. For example, you can specify that the system select only employee records in which the Zip code starts with **025**, as in the preceding illustration.

Note: When typing values to be used for selection tests, be sure to match exactly the way the system stores the data. The system selects only records that have values exactly matching the test you specify, including:

- Capital and lowercase letters (such as **Hyannis**, not **HYANNIS,** if your local conventions include upper and lower case addresses)
- Right or left justification (that is, type the value starting at the beginning of the *Value* field if the records have the values left-justified, and type the value at the right end of the *Value* field if the records have the value right-justified)

The table on the following page summarizes how to use this screen.

Task	Action
Test a field in each record against a value you type	Type a Test Operator in the *Test* field. To view a list of the available test operators, press F11. Press F12 to return to the Define Selection Criteria screen. The operators are: **EQ** Equal to **GE** Greater than or equal to **LE** Less than or equal to **NE** not equal to **GT** Greater than **LT** Less than **CT** Containing Then type a value in the *Value* field. Example: To select only Hyannis employees, type **EQ** in the *Test* field and **Hyannis** in the *Value* field.
Test a field in each record against a value in another column	Type a Test Operator in the *Test* field. Leave the *Value* field blank. In the *Col#* field to the right of the *Value* field, type the number of the column to be used in the test. Example: You want all payment transactions whose amounts do not match the related invoice. Include the payment and the invoice amount fields as Columns 10 and 11. For Column 10, type **NE** in the *Test* field, and **11** in the *Col#* field to the right of the *Value* field.
Use wildcards in the *Value* field	You can use a wildcard such as ***** in the *Value* field. Example: To limit the report output to employees who live in the 025 zip range, type **EQ** in the *Test* field and type **025*** in the *Value* field. Refer to Part 4 for details about the available wildcard characters, as well as the use of **TODAY** to specify the current day's date.
Use complex tests with two or more criteria	To apply multiple tests to the same field with and/or logic, type **1** in the *More* field to display the Expanded Selection Criteria screen. At the Expanded Selection Criteria screen, type **AND** or **OR** in the *Operator* field followed by an additional *Test* value with a corresponding *Value* or *Col#* entry. You can combine many tests. Press F12 to return to the Define Selection Criteria screen. Example: Your report lists employees in the 025 zip range. You want to add employees in the 026 zip range. At the Expanded Selection Criteria screen, type **OR** as the operator, **EQ** in the *Test* field, and **026*** in the *Value* field, as illustrated on the following page.

Type **1** in the *More* field at the Define Selection Criteria screen to display the following screen and enter additional tests if necessary.

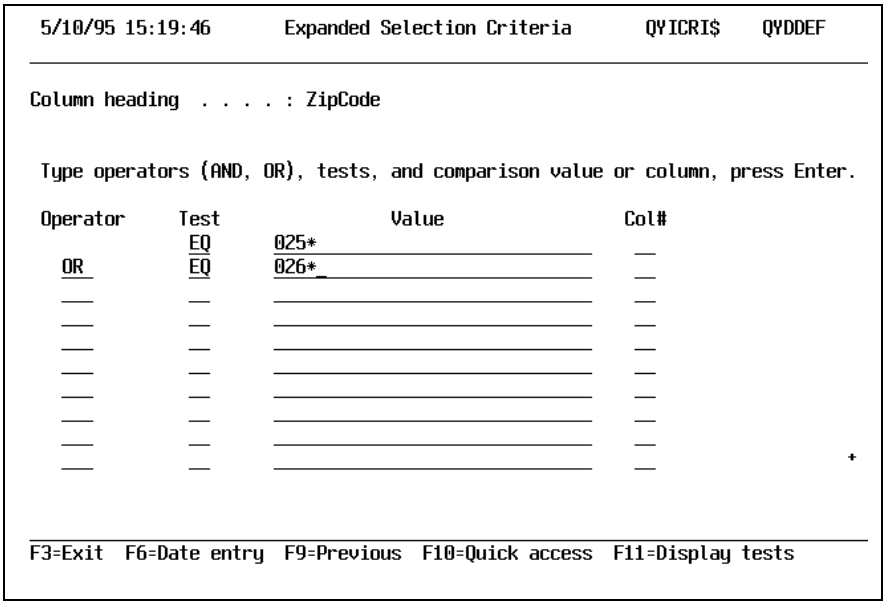


Figure 3-9: Expanded Selection Criteria screen

Refer to the Use Complex Tests entry in the table on the preceding page. Note the following for the use of the **AND** and **OR** operators.

Operator	Meaning
AND	Include records that pass this test in addition to the preceding test or tests. Example: Using **CT S AND CT E** for the common name field includes records for employees named **Su**e, **Sh**erman, and **Sh**elly, because these names contain both S and E. Sam, Egbert, and Joe are excluded because they do not have both.
OR	Include records that pass this test, even if they failed a preceding test. Example: Specifying **CT S OR CT E** for the common name field includes records for employees named **Su**e, **Sh**erman, **Sh**elly, **S**am, **E**gbert, and Jo**e**, because these names all contain at least one S or E.

Press F3 to return to the Define Selection Criteria screen.

When done specifying selection criteria, press Enter at the Define Selection Criteria screen to continue to the Define Sort and Grouping Options screen.

Defining Grouping and Sorting of Data on the Report

When you press Enter at the Define Selection Criteria screen, the system displays the Define Sort and Grouping Options screen.

```
 5/10/95 15:24:56     Define Sort and Grouping Options    QYISRT$    QYDDEF

Report name . . . . . . : EMPLCAPE

Type sort, group options, press Enter.
                                                -- Sort --   --- Group ---  First
Col#  Column heading                            Order  A/D   Active   Edit  Match
 01   Employee's                                  2_    A      0        0     0
      First Name
 02   Street                                      __    A      0        0     0

 03   City                                        1_    A      1        0     0

 04   State                                       __    A      0        0     0

 05   ZipCode                                     __    A      0        0     0




F3=Exit  F8=Quick select  F9=Previous  F10=Quick access
```

Figure 3-10: Define Sort and Grouping Options screen

Sort: Order and *A/D*

Type **1** in the *Order* field for the column to be used as the primary sorting criterion, type **2** for the secondary sort column, and so forth. If using the grouping fields after the *Sort Order* and *A/D* fields, ensure that you sort the columns in the same order that you group them, so that you are grouping and sorting from left to right across the report.

Example: If grouping data in columns 3 and 5, make column 3 the primary sort and column 5 the secondary sort.

Type **A** to sort in ascending order (1, 2, 3...; A, B, C; 1/1/95, 1/2/95...). Type **D** to sort data in descending order (3, 2, 1 and so forth).

Group: Active and Edit

Type **1** in the *Active* field for a column entry to group the output by that report column's values. Example: Type **1** in the *Active* field for the City column to have employees grouped by city in the report output.

Refer to Part 4 for information on using the *Edit* field to display a Group Processing Options window and to specify group-level text and totals.

First Match

Refer to Part 4 for information on using this field to limit the output.

Press [Enter] to continue to the next screen.

Defining Calculations to Use in Result Columns

When you press [Enter] at the Define Sort and Grouping Options screen, the system displays the Define Result Columns screen.

```
 3/14/95 16:10:35          Define Result Columns          QYICAL$    QYDDEF
_____________________________________________________________________________

Report name . . . . . . : EMPLDEP
                                                  + -
New                                     Term 1   / *   -------  Term 2  -------
Col#  Result column heading              Col#     =    Value        <or>   Col#
 10   Yrs                                 9       *    -1_________          __
      Left
_____________________________________________________________________________

 05   Age

 06   Depndnt
      DOB
 09   Intermed result-not printing        5       -    21________          __
      ____________________________
_____________________________________________________________________________
F3=Exit  F7=Result strings  F8=Quick select  F9=Previous  F24=More keys
```

Figure 3-11: Define Result Columns screen

Defining Calculation Result Columns

This screen lets you do the following:

- Add a new column in which to print the results of a mathematical calculation to be performed during report generation

- Specify the calculation

Example: Suppose your report includes salary and salary range fields. You can add a column headed **`If 2% Raise`** and specify printing the salary value multiplied by 1.02 (for adding 2%). The output lets you see where each employee would fall in the salary range after a 2% raise.

Defining Result Strings

You can press F7 at this screen to display a Define Result Strings screen that lets you add a new column and heading, and print the result of combining strings of characters from different fields. Example: Combine city, state, and postal code to build an address label column.

Refer to Part 4 for details and examples of using these Result screens, as well as information about alternative paths for accessing these screens.

When done with these screens, press Enter to continue to the Report Definition Options screen.

Using Report Definition Options to Review the Definition

When you press Enter at the Define Result Columns screen, the system displays the Report Definition Options screen.

```
 5/10/95 15:27:54        Report Definition Options       QYIMOD     QYDDEF
_________________________________________________________________________

Report name . . . . . . : EMPLCAPE

Type any character to select the definition option(s), press Enter.

Sel   Definition option
 _    Define all
 _      Set report controls
 _      Select libraries
 _      Select files
 _      Select fields
 _      Format report columns and headings
 _      Define selection criteria
 _      Define joins and join options
 _      Define sort and grouping options
 _      Define result columns

 _    Work with target libraries and files

_________________________________________________________________________
F3=Exit  F5=Interactive Run  F6=Preview  F8=Quick select  F10=Quick access
```

Figure 3-12: Report Definition Options screen

The Report Definition Options screen lets you do any of the following.

Action	Purpose
Type any character next to Define All and press Enter	Repeat the report definition screen sequence, checking and editing the data
Type any character next to any report definition screen name and press Enter	Go to the selected screen to check and edit the data **Note:** When you press Enter at that screen, the system returns you to the Report Definition Options screen.
Type any character next to Work with target libraries and files, and press Enter	Change a library or file used in the report to a different library or file **Note:** Refer to Part 4 for detailed instructions.
Press F6	Display the format in the Preview Report Output panel
Press F5	Run the report interactively, displaying the results
Press F3	Exit from the current report definition function

Refer to Part 4 for more details about these options. The next topic in this part of the guide describes how to run and review the report interactively.

Reviewing Your Report by an Interactive QY

Pressing F5 at the Report Definition Options screen runs the report definition interactively, letting you review your report's output (format and data) on your terminal.

Caution: Infinium QY limits the output of interactively-run reports to the number of records specified in the *Interactive record limit* field on the Set Report Controls screen. Consequently, what you see on the screen may not be a full report because of the interactive limit.

You can set this field to any number between **1** and **1000**.

The **1000** limit helps conserve available system resources for all users.

You can run a report quickly and view a short sample of the output with data by setting the *Interactive record limit* field to a low number like **10**.

When you press F5 at the Report Definition Options screen, the system does the following:

1. Displays interactive report generation messages at the bottom of the Report Definition Options screen
2. Then displays the Display Report Output screen illustrated on the following page

Working with the Interactively Displayed Output

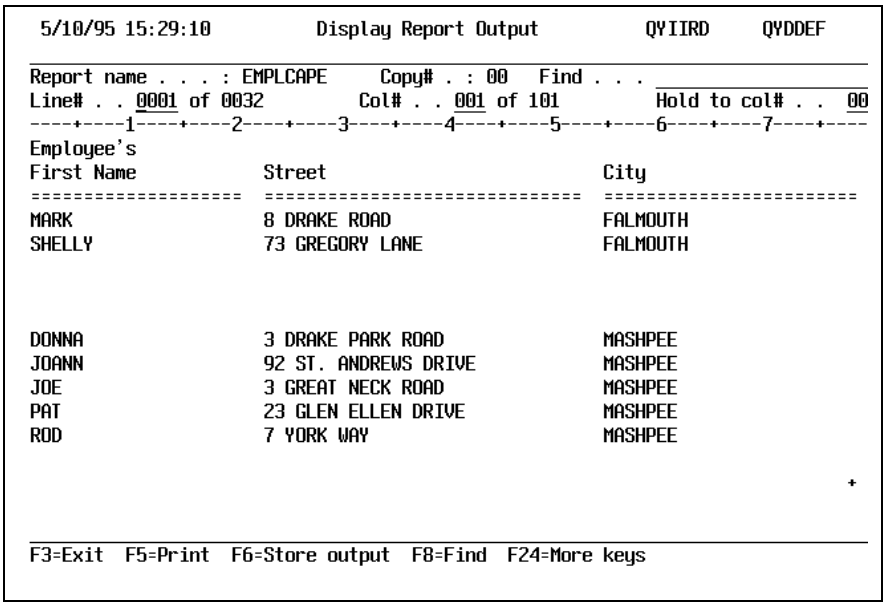


Figure 3-13: Display Report Output screen

The Display Report Output screen lets you do the following.

Action	Purpose
Press F20	Shift the display right to see more of the output
Press F19	Shift the display left to see more of the output
Press F8	Execute a search of the report output for text you just typed in the *Find* field; type text you want to find and press F8.
Press F17	Return to the top of the displayed report output
Press F5	Print up to 1000 records of the interactive report output
Press F6	Store up to 1000 records of the interactive report output
Press F3 or F12	Return to the Report Definition Options screen

Refer to Part 5 of this guide for more information about interactively running and displaying report output.

Exiting the *Create/Copy* Function

When done reviewing your report, do one of the following:

- If your review identified any necessary or desirable report definition changes, press F12 to return to the Report Definition Options screen and use that screen's options to make the changes to the definition.
- If the review confirmed that the report definition is fine, exit the *Create/Copy* function.

The following steps explain how to save your report definintion changes and exit the *Create/Copy* function:

1. At the Display Report Output screen, press F12 to return to the Report Definition Options screen.
2. At the Report Definition Options screen, press F3 to exit the *Create/Copy* function.
3. At the Exit Options window, type **1** and press Enter to save the current version of your report definition.

   The system returns you to the Infinium Query *Report Definition* menu.
4. Press F12 to return to the top level main menu.

The following workshop helps you practice defining and reviewing a report for your Infinium database application.

Hands-on Workshop: Creating Your Own Report

In this workshop you design and create a single-file report to extract data from one database file. You print the file in the Part 5 workshop later.

In a classroom setting, the instructor provides:

- Your User ID and password
- How to ensure your report name is unique in the class, such as prefixing the name with S1, S2, S3 or the like for student 1, student 2, and student 3 and so forth.
- The library to use, if other than specified in this guide
- The selection criteria to use, if other than specified in this guide

Create the definition for one of the reports listed in the following tables.

1. Choose the application with which you most frequently work or that you are currently learning to query.
2. Use the report data on the following pages for that application to design the report on the blank worksheet provided in Exercise 3-1 beginning on page 3-7.
3. Use your filled-in worksheet to complete exercises 3-2 and 3-3.

Caution: Limit the output to 20 records by setting the *Interactive Record Limit* field value on the Set Report Controls screen to **`20`**.

Infinium AR

Use library TRAINQYAR and the data in the following table.

Contents	File	Fields
Customer List	Customer Master File (ARPCU)	*AR Company*
		Customer Number
		Customer Name
		City

Modify the column headings to fit the column width requirements. Sort and group by *AR Company*.

Infinium OH

Use library TRAINQYEM and the data in the following table.

Contents	File	Fields
All employees in company MCM, with date of hire	Health Master File (EMPHM)	*Employee Name*
		Employee Number
		Department
		Date of Hire

Modify the column headings to fit the column width requirements. Sort and group by *Department*.

Infinium FA

Use library TRAINQYFA and the data in the following table.

Contents	File	Fields
Assets and their purchase prices	Asset Root Master File (FAPAB)	*Company*
		Asset Activity Flag
		Asset Number - Primary
		Asset Description
		Purchase Price

Modify the column headings to fit the column width requirements.

Do not print the *Asset Activity Flag* column. At the Selection Criteria Screen, make *Asset Activity Flag* equal blank.

Infinium GL

Use library TRAINQYGL and the data in the following table.

Contents	File	Fields
Period sales, by salesperson	Transaction Detail File (GLPTX)	*Sales Representative*
		Accounting Month
		Accounting Year
		Standard Amount

Modify the column headings to fit the column width requirements.

At the Selection Criteria screen, use the following criteria:

- Accounting Month is equal to 05
- Accounting Year is equal to 1995 or the most recent year in your training database

Note: The Infinium GL report provides the data in negative numbers unless you perform a simple calculation.

Leave the number negative for this exercise.

If you prefer, you can refer to the explanation in Part 4 on the Define Result Columns screen for an example of changing a negative number to a positive number by multiplying by -1 (negative 1).

Infinium IC

Use library TRAINQYMM and the data in the following table.

Contents	File	Fields
List of all on-hand inventory (type 20) in Company QY Warehouse 1	PRDINVEN	*Company*
		Location
		Product Code
		Size
		Inventory Type
		Units on Hand

Modify the column headings to fit the column width requirements. Limit the selection to Company QY and Location Warehouse 1.

Infinium OP

Use library TRAINQYMM and the data in the following table.

Contents	File	Fields
Sales Persons in Company QY	OPPSLM	*Company*

Contents	File	Fields
		Sales Person ID
		Name of Salesperson
		Sales Region

Modify the column headings to fit the column width requirements. Limit the selection to Company QY.

Infinium PL

Use library TRAINQYPL and the data in the following table.

Contents	File	Fields
Vendor Master List	PLPVE	*Vendor ID*
		Short name
		Vendor name
		Default terms code
		Default distribution code
		Default account number
		Model FLAG

Modify the column headings to fit the column width requirements. Select records that have the model flag value **`0`**. Sort on the *Short name* field.

Infinium MC

Use library TRAINQYMM and the data in the following table.

Contents	File	Fields
Raw materials in Company QY, Warehouses 2 to 5	RAWMATPF	*Company*
		Location
		Raw Material Code
		Size

Modify the column headings to fit the column width requirements. Group the report by location.

Infinium PM

Use library TRAINQYPM and the data in the following table.

Contents	File	Fields
Purchase order receiving report	P.O. Receipts File (PMPPR)	*Company*
		Item Code
		Purchase Order Identification
		Quantity Received
		Date Received

Modify the column headings to fit the column width requirements.

Infinium HR/PY

Use library TRAINQYHR and the data in the following table.

Contents	File	Fields
Employee list for an internal mailing	Employee Root Master File (PRPMS)	*Employee name*
		Employee number
		Level 2 (Department Number)
		Employer Code

Modify the column headings to fit the column width requirements. At the Selection Criteria screen, select for Employer Code EGG.

Workshop Exercises

Exercise 3-1 **Planning a New Report**

Report Planning Work Charts

Use the following charts to plan your report. For example, what do you want the title of the report to be? What information do you want to print in the each column?

Report Title:							
	Col 1	**Col 2**	**Col 3**	**Col 4**	**Col 5**	**Col 6**	**Col 7**
Column Heading							
Field Name							

Which file and library contain the information you need to build your report?

Library:
Primary File:
Fields needed:

Additional Considerations?

What selection criteria will you use to extract data for your report?

Do you need to do any calculations within this report?

Complete the appropriate rows of the following worksheet.

Report Title:						
	Column 1	**Column 2**	**Column 3**	**Column 4**	**Column 5**	**Column 6**
Column Heading						
Field Name						
Libraries						
File						
Derived Column						
Calculations						
Result String						
Format Option						
Selection Criteria						
Group/Sort						
Join Column						

Note: Part 3 of this guide covers using the data from the Report Title, Column Heading, Field Name, Library, and File rows of the worksheet, as well as basic uses of the Selection Criteria and Group/Sort rows. Part 4 provides more details about using data from the remaining rows.

For Exercise 3-1, note in the Selection Criteria and Group/Sort rows of the worksheet any information that applies from the preceding application-specific data tables and instructions.

Exercise 3-2 Creating the Report Definition

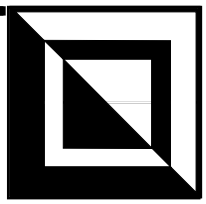
1. At the Infinium QY main menu select *Report Definition*.
2. Select *Create/Copy*.
3. Follow the Create/Copy procedure described in Part 3 of this guide to create your report definition based on the design you completed in Exercise 3-1.

Exercise 3-3 Reviewing Your Report Output

Use the interactive query option at the Report Definition Options screen to view the format and output of the report you created in Exercise 3-2.

You will print the report in a Part 5 workshop.

Part 4



Modifying a Report and Defining a Complex Report

This part of the guide builds on Part 3 by providing detailed instructions for modifying an existing report and defining a complex report. The instructions provide reference details about screen access paths, the fields on each of the report definition screens, and your additional options at each screen.

The following pages cover these topics:

Topic	Page
Creating a New Report Definition	4-3
Copying an Existing Report Definition	4-6
Modifying an Existing Report Definition	4-8
Setting the Report Controls	4-11
Selecting Libraries	4-17
Selecting Files	4-20
Selecting Fields	4-26
Working with Date Fields	4-33
Formatting Report Columns	4-38
Defining Selection Criteria	4-49
Joining Files through Shared Fields	4-57

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Objectives

This part of the guide helps you learn to do the following:

- Make a copy of a report definition to edit for a new definition
- Edit an existing report definition
- Use the full range of report definition fields and features, such as using the hundred-year format date fields in reports; using data from more than one file in a report; grouping, sorting, and summarizing report contents; limiting output to the first matching record for a given column; and specifying numeric calculations and string manipulations for results to be printed on a report
- Use the *Report Maintenance* menu's *Directory* option to generate a customized directory of report definitions and to work with listed definitions to perform a wide range of tasks
- Change the target library and files from one system version, such as your test or training version of the database application, to another system version, such as your production version that has real data
- Change the name of a report definition
- Use physical file output from one report as input for another report

The workshop at the end of this part of the guide lets you practice creating and modifying a multi-file report. The workshop instructions let you choose the Infinium product to use for the exercise.

Creating a New Report Definition

In Part 3 of this guide, you learned how to create a single-file report and became familiar with the basic Infinium QY report definition screens.

This topic, Creating a New Report Definition, summarizes the steps you learned in Part 3 for beginning to create a new report definition. Topics later in this part of the guide provide instructions on using the full range of Infinium QY features to create simple and complex reports.

Perform the following steps to create a new report definition:

1. At the Infinium QY main menu select *Report Definition*.
2. Select *Create/Copy*.

   The system displays the Create Report screen.

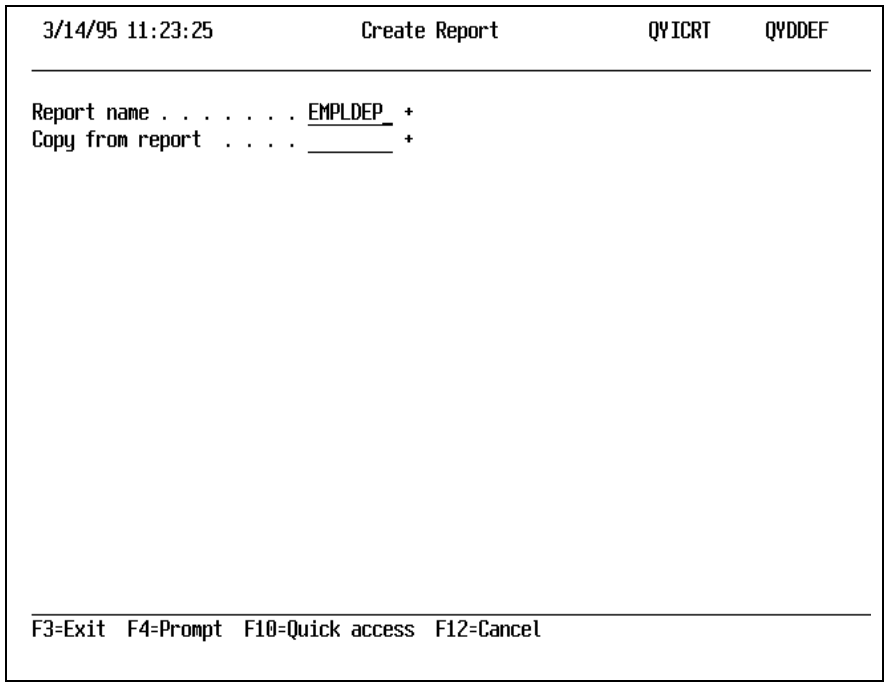


Figure 4-1: Create Report screen

Report name

3. Type a name for the new report in the Report name field.

You can use up to eight alphanumeric characters for the name, including the letters A to Z, the numbers 0 to 9, the pound sign # and the underscore _. You must start the name with a letter, and must not use any blanks. Use the underscore to separate name elements as in WKLY_RPT.

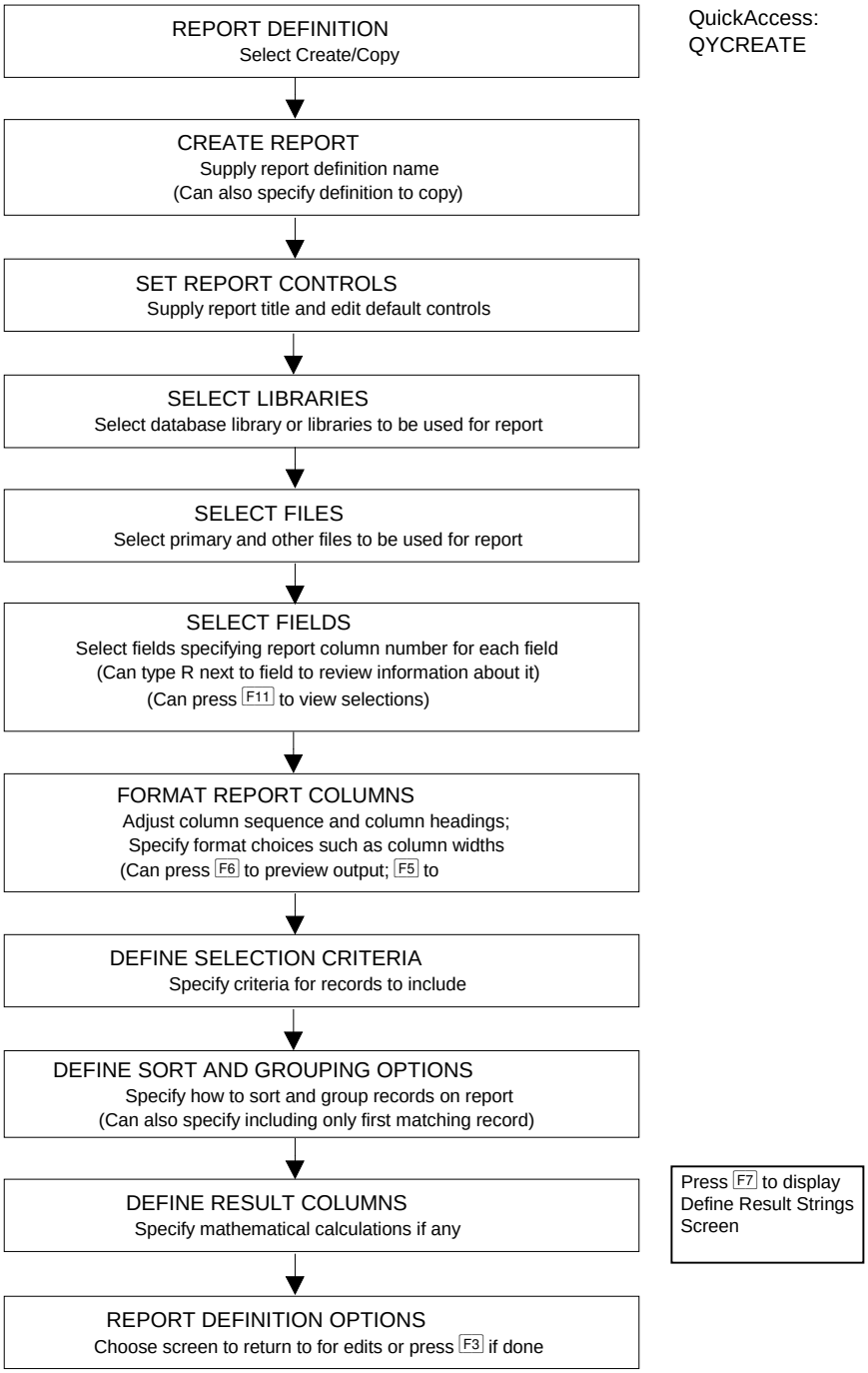
When you have typed the name, press Enter to continue to the Set Report Controls screen.

4. Go to the Setting Report Controls task beginning on page 4-11 of this guide. Follow the instructions for that task and the subsequent tasks through the Using the Report Definitions Options Screen task later in Part 4 of this guide.

The workshop at the end of this part of the guide lets you practice tasks by creating a report for a Infinium database application you use.

Note: The diagram on the following page provides a reminder of the basic steps for creating a report definition.

This diagram summarizes basic steps for creating a new report definition. The task instructions in this part of guide add further details that apply at each screen, including optional access to additional screens.


REPORT DEFINITION
Select Create/Copy
QuickAccess:
QYCREATE
CREATE REPORT
Supply report definition name
(Can also specify definition to copy)
SET REPORT CONTROLS
Supply report title and edit default controls
SELECT LIBRARIES
Select database library or libraries to be used for report
SELECT FILES
Select primary and other files to be used for report
SELECT FIELDS
Select fields specifying report column number for each field
(Can type R next to field to review information about it)
(Can press F11 to view selections)
FORMAT REPORT COLUMNS
Adjust column sequence and column headings;
Specify format choices such as column widths
(Can press F6 to preview output; F5 to
DEFINE SELECTION CRITERIA
Specify criteria for records to include
DEFINE SORT AND GROUPING OPTIONS
Specify how to sort and group records on report
(Can also specify including only first matching record)
DEFINE RESULT COLUMNS
Specify mathematical calculations if any
Press F7 to display
Define Result Strings
Screen
REPORT DEFINITION OPTIONS
Choose screen to return to for edits or press F3 if done

Copying an Existing Report Definition

Copying an existing report definition lets you create another definition with a new name. You can edit the new definition to suit your needs.

Any edits to the copy do not affect the original report definition.

Perform the following steps to copy an existing report definition:

1. At the Infinium QY main menu select *Report Definition.*
2. Select *Create/Copy*.

   The system displays the Create Report screen.

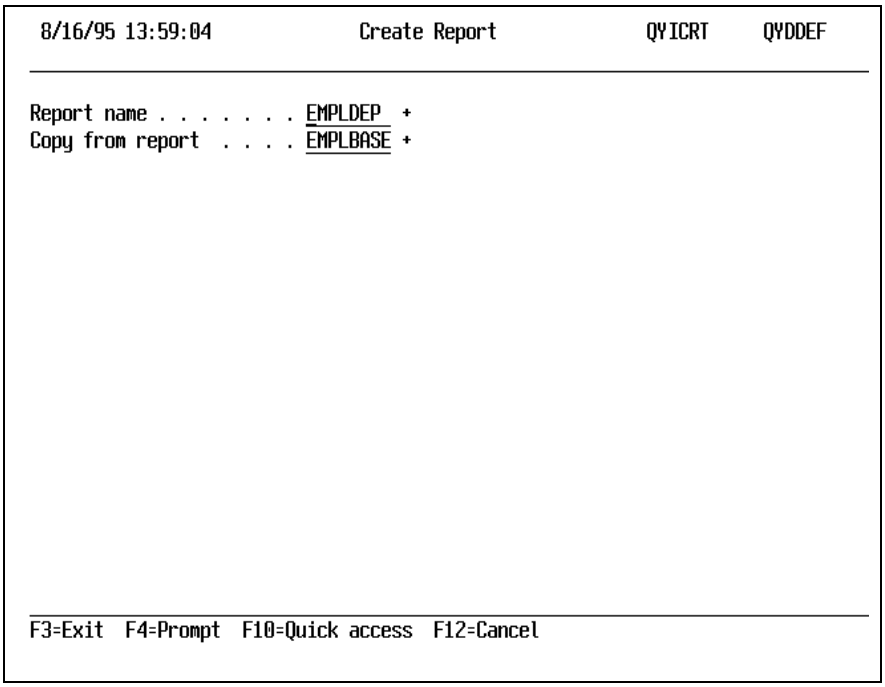


Figure 4-2: Create Report screen

3. In the *Report name* field, type a name for the new report definition.

The rules for the name are the same as for creating a new report definition. Refer to the "Creating a New Report Definition" task earlier in Part 4 of this guide for details.

4. In the *Copy from report* field, type the name of the original report you want to copy.

   Note: Press F4 in this field to display a list of existing report definitions you are authorized to access. This list of up to 9,999 locally-defined reports identifies each report by definition name, title, owner, and the date and time the report definition was last updated.

   Use the *Position to* field above the list to position the cursor at or near the report you want: Type the first letter or the first few letters of the report's name in the *Position to* field and press Enter. The cursor moves to the first matching report name.

   To choose a report to be copied from this list, type any character in the field to the left of the report name and press Enter. The system returns you to the Create Report screen and supplies the report's name in the *Copy from report* field.

5. Press Enter to display the *Report Definition Options* screen.

6. To edit the new report definition, continue to step 5 in the next topic, "Modifying an Existing Report Definition.".

Modifying an Existing Report Definition

You can revise a saved report definition at any time by using the Infinium QY *Report Maintenance* menu's *Modify* option. Note the following:

- The revised version replaces the original report definition.
- Consequently, if you still want the original version too, copy the original version as described in the Copying an Existing Report Definition task earlier in Part 4 of this guide rather than modifying the original description.

Perform the following steps to modify an existing report definition:

1. At the Infinium QY main menu select *Report Maintenance*.
2. Select *Modify*.

   The system displays the Modify Report screen as follows.

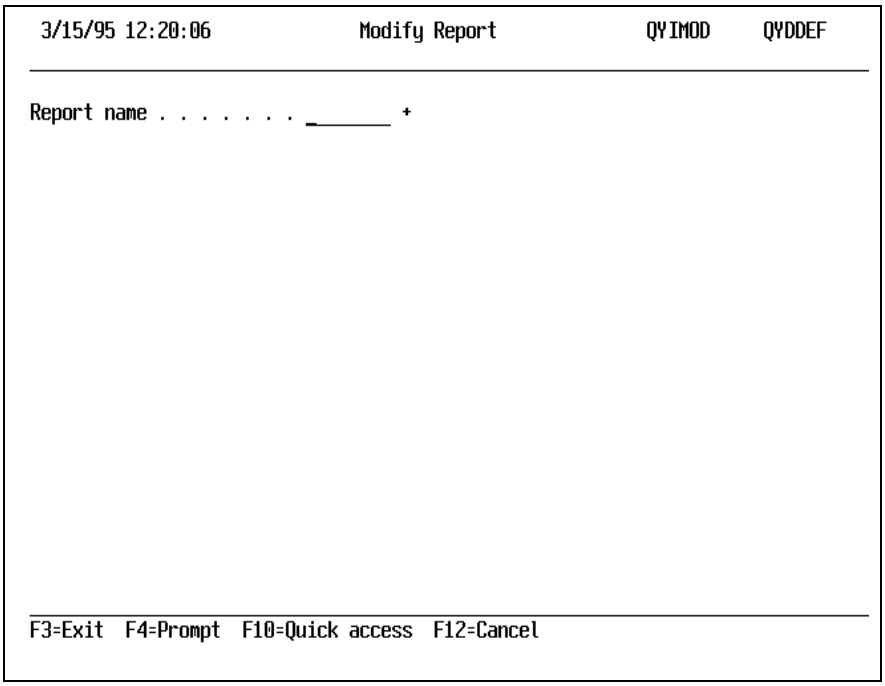


Figure 4-3: Modify Report screen

3. Type the name of the report to be modified in the *Report name* field.

   You can press F4 to display a list of reports. At the list, type any character next to the report name and press Enter to return to the Modify Report screen. The system supplies the *Report name* value.

4. Press Enter to continue. The system displays the Report Definition Options screen.

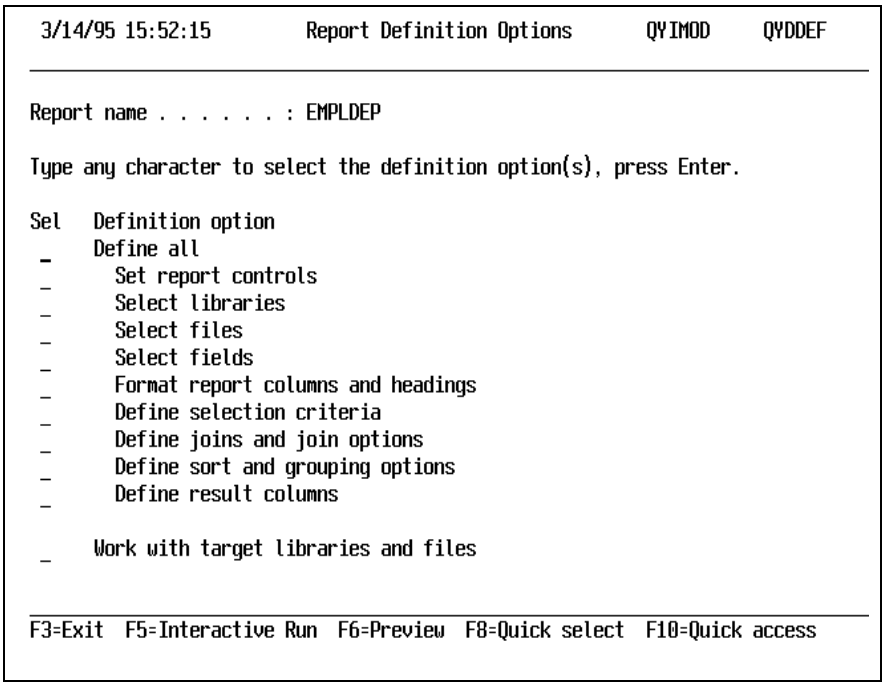


Figure 4-4: Report Definition Options screen

5. For each report definition element you need to modify, select the appropriate task by typing any character in the *Sel* field. Follow the instructions for that task later in this part of this guide. See the table at the beginning of this part for a list of tasks and page numbers.

   At the end of the task, the system returns you to the Report Definition Options screen. Repeat for each additional change task.

6. When done making changes, press F3 at the Report Definition Options screen to exit from the *Modify* function. The system displays the standard Exit Options window.

7. Type **1** to exit saving your changes. The system returns you to the *Report Maintenance* menu.

Note: You can also access the Report Definition Options screen and modify a definition through use of the *Directory* function. See the Using the Report Maintenance Directory topic later in Part 4 of this guide.

Setting the Report Controls

The Set Report Controls screen lets you define such general report definition characteristics as the following:

- The title to be printed at the top of each report page
- Ownership and security controls to limit who can change or run the report definition
- Report generation and printing control information to control such factors as single, double, or triple spacing of the output and which printer control to use for this report

Accessing the Set Report Controls Screen

The following table explains how to access the Set Report Controls from the other report definition screens.

Screen	Action
At the Create Report screen during initial Create/Copy definition	Press Enter.
At the Report Definition Options screen	Type any character in the *Sel* field next to the Set report controls entry and press Enter.
At the Select Libraries screen during initial Create/Copy definition	Press F9 for previous.
At any other report definition screen	Press F3 to display the Report Definition Options screen and select *Set report controls*.

When you perform one of these steps, the system displays the Set Report Controls screen, illustrated on the following page.

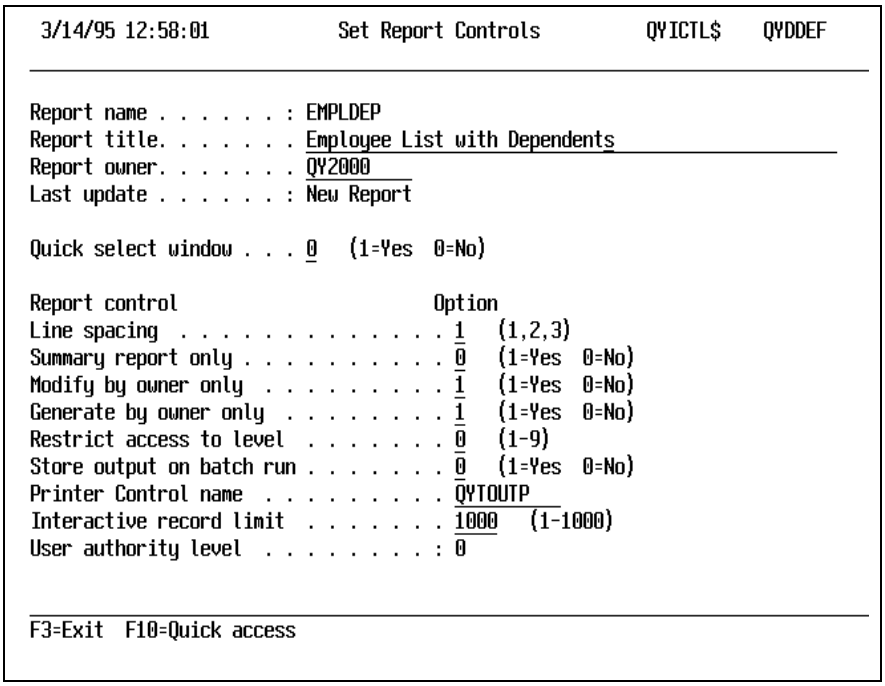


Figure 4-5: Set Report Controls screen

Processing the Set Report Controls Screen

Use the following information to process the fields on this screen:

Report name

The system displays the report definition name in the *Report name* field. This is the name you specified on the Create Report screen or the Modify Report screen. You cannot edit this field.

Report title

Type the title to be printed at the top of your report in this field. The report title can be up to 50 characters long.

Report owner

This field identifies one of the following:

- The user who created the report
- The user assigned as owner of the report by a supervisor signed on as **QY2000**

The supervisor can assign ownership of the report only to users authorized to access Infinium QY.

Last update

This field displays the date and time of the most recently saved change to your report definition. You cannot edit this field.
Note: During creation of a new report definition, this field displays **`New Report`**.

Quick select window

Type **`0`** to use the standard report definition screen flow for your report definition. The flow includes the following screens: Select Libraries, Select Files, Select Fields.

Type **`1`** to use the Quick Select window instead of the standard screen flow. The Quick Select window requires you to type names of the libraries, files, and fields and does not display the screens listed above.

Refer to the Using the Quick Select Window subtopic later in this Setting the Report Controls section for details.

Line spacing

Type **`1`**, **`2`**, or **`3`** for single, double, or triple spaced printed output.

Summary report only

Type **`1`** for a summary report. A summary report contains only group and final statistical records such as totals and averages of values and maximum and minimum values.

Type **`0`** for a detail report. A detail report contains a line-by-line detail of all report records.

Note: To generate a summary report, you must define the appropriate grouping for the selection criteria. Refer to the "Defining Sort and Group Options" topic later in Part 4 of this guide.

Modify by owner only

Type **`1`** to restrict report modification and copying of the report definition to only the owner of the report.

Type **`0`** to grant report modification to any Infinium QY user with the authority level needed to access the report as indicated in the *Restrict access to level* field later on this screen, as well as the authority level needed to access each field referenced in the report definition.

Generate by owner only

Type **`1`** to restrict report generation to the owner of the report only.

Type **0** to grant report generation to any Infinium QY user with the necessary authority level to access the report and the fields within the report.

Restrict access to level

Type **1** through **9** to set the authority level needed to modify or generate the report. This value is ignored for modification access if the *Modify by owner only* field is set to **1**. This value is ignored for generation access if the *Generate by owner only* field is set to **1**.

Store output on batch run

Type **1** to store the report output rather than create a spool file for printing.

Type **0** if the output is not to be stored, but is instead to be written to a spool file for printing.

If you store a report with option **1**, the system does not print the report during a batch run. You can view a stored report on your terminal and print the report later. Each copy of a stored report is assigned the next sequential number. You can store no more than 99 copies of a report.

Printer Control name

Type the Infinium Application Manager printer control name that is to be the default when the report is generated or printed. The printer control field can be overridden on the Report Generation Batch Run screen when the report is submitted to print. The default printer control is **QYTOUTP**.

Interactive record limit

This field lets you limit the number of records to be included in an interactively-generated report. Type any value from **1** through **1000** to indicate the limit. The system stops gathering data when it reaches the number of matching records specified as the interactive record limit.

User authority level

The *User authority level* field displays the authority level of the current user on the system. You cannot edit this field.

Note: Regardless of the access restrictions specified at this screen, users signed on as **QY2000** or **AM2000** can always copy or modify the report definition and can always generate the report. In addition, the user signed on as **QY2000** or **AM2000** can always edit the *Report owner* field. This ensures that a supervisor can reassign ownership of the report.

Exiting the Set Report Controls Screen

When you have finished working with the report controls fields, choose one of the actions from the following table.

Goal	Action
To continue the *Create/Copy* function report definition sequence	If using the *Create/Copy* function to create a new report definition, press Enter to continue. Refer to the note after this table for more details. If using the *Create/Copy* function to copy and edit a report definition, press F3 to return to the Report Definition Options screen.
To go to the Report Definition Options screen	Press F3. Go to the "Using the Report Definitions Options Screen" task later in this part of the guide.
To cancel this report definition or modification process	Press F3 to go to the Report Definition Options screen. Press F3 again to display the Exit Options window. Type **2** and press Enter to exit without saving your work on this definition.

Note: The next step in the *Create/Copy* or *Modify* function screen sequence after you press Enter depends on the value you specified in the *Quick select window* field on the Set Report Controls screen.

- If you typed **0** in the *Quick select window* field during an initial Create/Copy session, the system displays the Select Library screen. Go to the Selecting Libraries task later in this part of the guide. If you are copying or modifying a report, you return to the Report Definition Options screen.
- If you typed **1** in the *Quick select window* field during any function, the system displays the Quick Select Window. Perform the steps on the following page of this Setting the Report Controls section.

Using the Quick Select Window

The quick select window lets you bypass the three standard library, file, and field selection screens during initial Create/Copy function report definition and during subsequent report modification. You can use this

window if you know the names of the library or libraries, file or files, and fields to be selected for or added to this report.

Note: Infinium QY automatically resets the *Quick select window* field to **0** on the Set Report Controls screen when you are done.

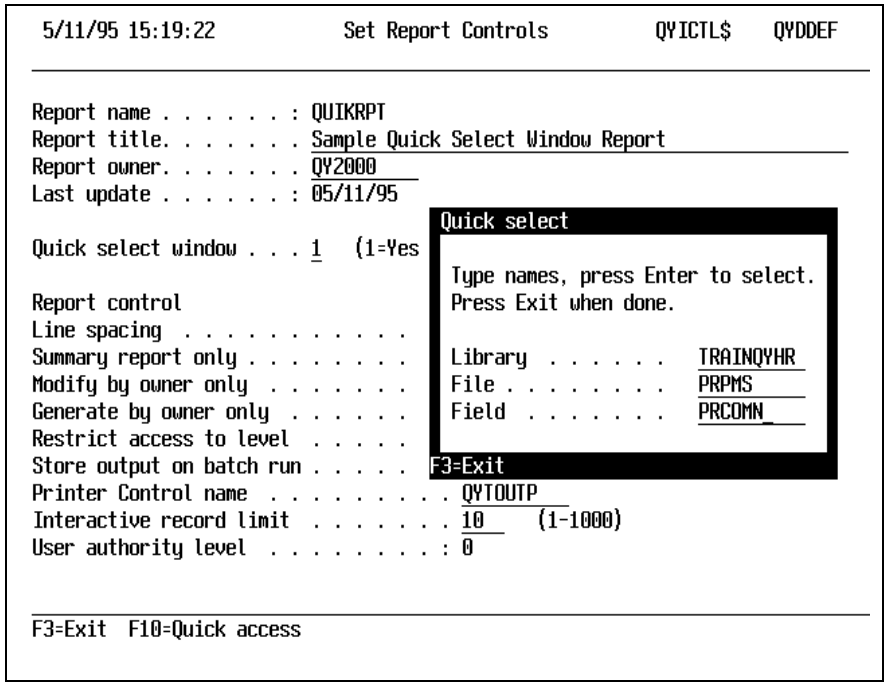


Figure 4-6: Quick Select window

Perform the following steps to use this window:

1. Identify the first field to be selected for or added to this report by typing the library, file, and field names for that field.
2. Press Enter to add the field as a column in the report definition. The system displays a message that this field has been added to the report. **Note:** If the names are not valid, the system displays an error message. Check the spelling of the names, and try again.
3. Repeat steps 1 and 2 to add each additional field/column.
4. When done selecting fields, press F3 to continue to the Format Report Options screen or the Report Definition Options screen, depending on whether you are creating or modifying the report.

Selecting Libraries

Accessing the Select Library Screen

The following table specifies how to access the Select Library screen from the other report definition screens.

Screen	Action
Report Definition Options	Type any character in the *Sel* field next to the Select Libraries entry and press Enter.
Set Report Controls	If using the *Create/Copy* function to create a new report definition, press Enter. If using the *Create/Copy* function to copy and edit an existing definition or if using the *Modify* function, press F3 to return to Report Definition Options screen. Type any character in the *Sel* field next to the Select Libraries entry and press Enter.
Select Files	If using the *Create/Copy* function to create a new report definition, press F9 to return to the previous screen. Otherwise, press F3 to return to the Report Definition Options screen. Type any character in the *Sel* field next to the Select Libraries entry and press Enter.
Any other report definition screen.	Press F3 to display the Report Definition Options screen. Type any character in the *Sel* field next to the Select Libraries entry and press Enter.

The system displays the Select Libraries screen, illustrated on the following page.

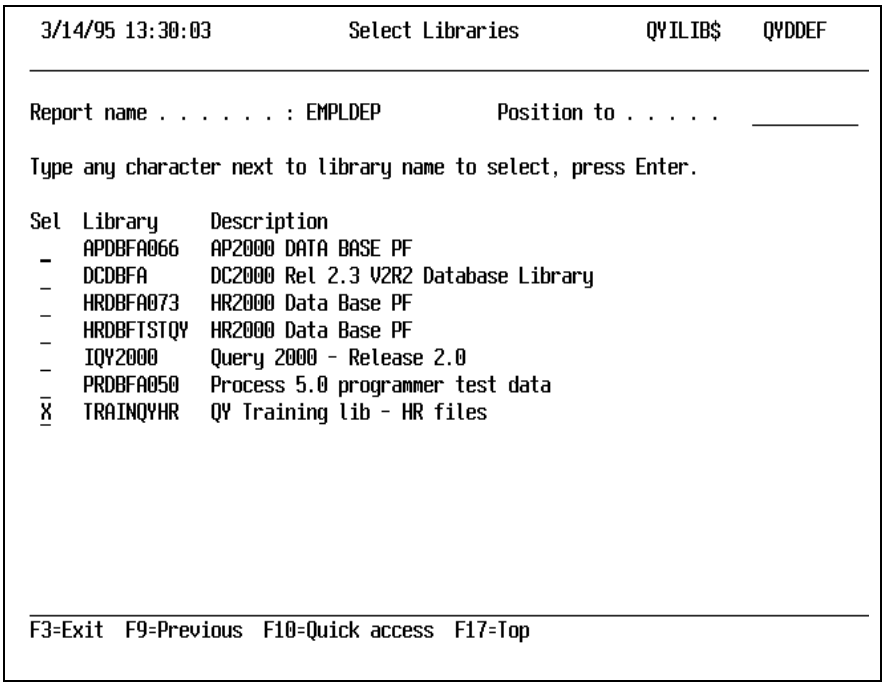


Figure 4-7: Select Libraries screen

Selecting a Library or Libraries

Perform the following steps to select the library or libraries that contain files with the data you want to use in this report.

1. Type any character in the *Sel* field next to a library to select that library.

   Note: Library IQY2000 contains the physical files for reports you have already generated as physical files. If you plan to use data from a previously-generated report physical file as input for this new report, select IQY2000. For more information, refer to "Using a Physical File as Input for a New Report" later in this part of the guide.

2. Repeat step 1 for each library to be used to generate this report.

   Your report definition worksheets should provide you with the checklist of libraries to be selected.

3. When done selecting, choose one of the actions from the table on the following page.

Exiting the Select Libraries Screen

When done selecting libraries, choose one of the following actions:

Goal	Action
To continue the *Create/Copy* function report definition sequence	If using the *Create/Copy* function to create a new report definition, press Enter to continue to the Select File screen. Go to the Selecting Files task later in this part of the guide. If using the *Create/Copy* function to copy and edit an existing report definition, press F3 to return to the Report Definition Options screen and select your next task.
To return to the previous screen	Press F9. If using the *Create/Copy* function to create a new definition, return to the "Setting the Report Controls" task earlier in this part of the guide. If you are using the *Create/Copy* function to copy and edit a definition or using the *Modify* function, the system returns to the Report Definitions Options Screen. Select your next task.
To go to the Report Definition Options screen	Press F3. Go to the Using the Report Definitions Options Screen task later in this part of the guide.
To cancel this report definition process.	Press F3 to go to the Report Definition Options screen. Press F3 again to display the Exit Options window. Type **2** and press Enter to exit without saving your work on this definition.

Selecting Files

Accessing the Select Files Screen

The following table explains how to access the Select Files screen from the other report definition screens.

Screen	Action
Report Definition Options	Type a character in the *Sel* field next to Select Files. Press Enter.
Select Libraries	If using the *Create/Copy* function to create a new report definition, press Enter.
Select Fields	If using the *Create/Copy* function to create a new report definition, press F9 to return to the previous screen. Otherwise, press F3 to return to the Report Definition Options screen. Type a character in the *Sel* field next to Select Files. Press Enter.
Any other report definition screen	Press F3 to display the Report Definition Options screen and type a character in the *Sel* field next to Select Files. Press Enter.

The system displays the Select Files screen.

Refer to the illustration and instructions on the following page.

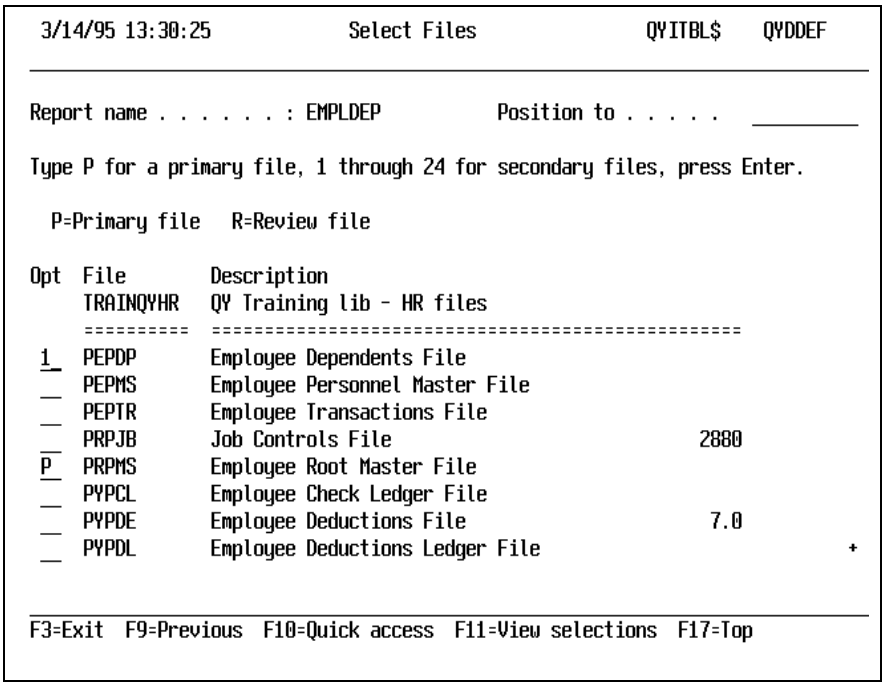


Figure 4-8: Select Files screen

This screen lists the files you are authorized to access in the libraries previously selected at the Select Libraries screen. If there are multiple selected libraries, the system displays the files for the first library followed by the files from the second library, and so forth.

Planning the Primary and Secondary Files

For report generation efficiency, use the file with unique key data for records as the primary file.

Example:

- The Employee Root Master File uses a unique employee number in each employee record.
- The Dependents File uses the same employee number in each dependent record associated with that employee, so the same key employee number occurs in multiple records.
- Consequently, it is more efficient in this case to use the Employee Root Master File as the primary file.

Reviewing Files before Selecting

If you are not certain whether a particular file is the file you want to select, perform the following steps to review information about the file.

1. Type Enter in the *Opt* field next to the file's name in the file list.

   The system displays the Review File window, letting you check information about the fields that are included in this file:

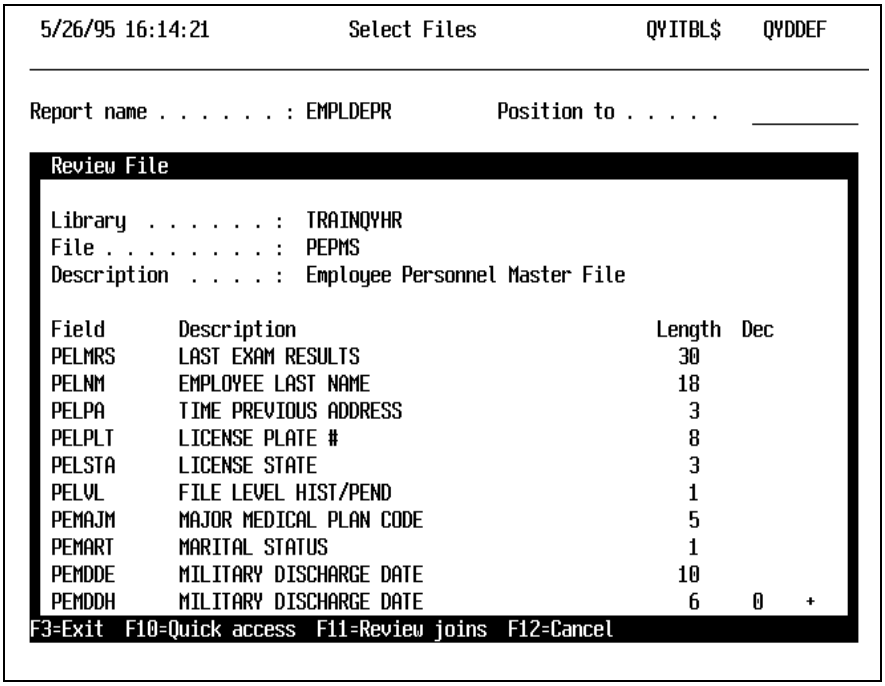


Figure 4-9: Review File window

2. Press F12 to return to the Select Files screen.

Caution: You can perform file review at any time during file selection, either before selecting a file or after selecting a file.

If you review a file you previously selected and confirm this is the file to be selected, you must retype the file selection character after completing the review since the Enter replaced the selection character. Refer to the next page for details about the file selection characters.

Marking Files for Selection

Perform the following steps at the Select Files screen to select the primary and secondary files to be used for this report.

1. If necessary, press PgDn to find each file you want to select.

   If you know a file's name, you can type that name in the *Position to* field and press Enter. The cursor moves to that file in the list.

2. Type **P** in the *Sel* field next to the primary file for this report.
3. Type **1**, **2**, **3** and so forth in the *Opt* field next to the secondary files for this report. You can choose up to 24 secondary files.

Pressing F11 to View Your Selections

During file selection, you can press F11 to review your current selections. When you press F11, the system displays the Selected Files screen.

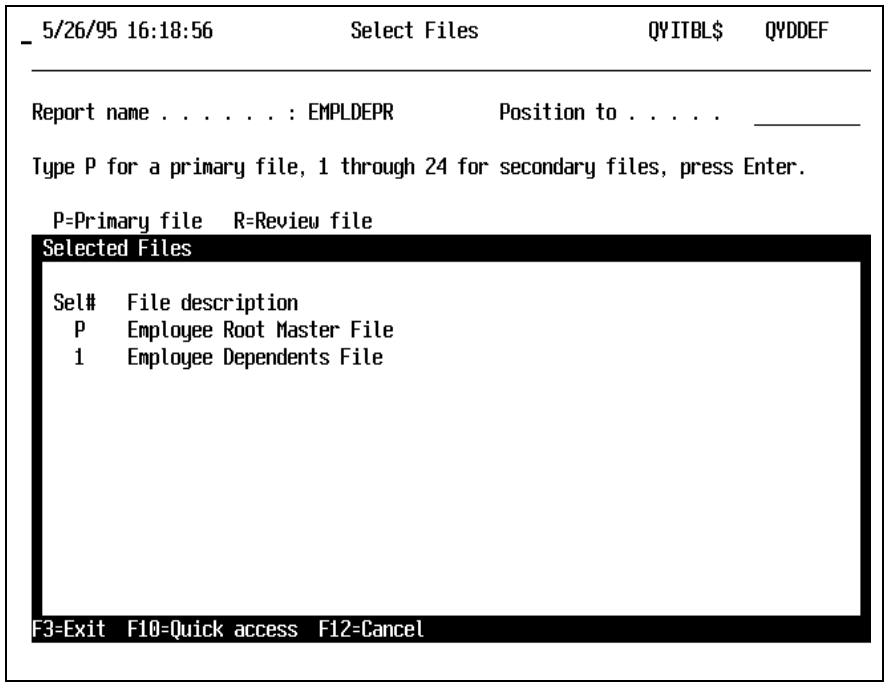


Figure 4-10: Selected Files screen

At the Selected Files screen, press F12 to return to the Select Files screen.

Exiting the Select Files Screen

When done selecting files, choose one of the following actions.

Goal	Action
To continue the *Create/Copy* function report definition sequence	If using the *Create/Copy* function to create a new report definition, press Enter to continue to the Select Fields screen. Go to the Selecting Fields task later in this part of the guide. If using the *Create/Copy* function to copy and edit an existing report definition, press F3 to return to the Report Definition Options screen and select your next task.
To return to the previous screen	Press F9. If using the *Create/Copy* function to create a new definition, return to the Selecting Libraries task earlier in this part of the guide. If you are using the *Create/Copy* function to copy and edit a definition or using the *Modify* function, the system returns to the Report Definitions Options Screen. Select your next task.
To go to the Report Definition Options screen	Press F3. Go to the Using the Report Definition Options Screen task later in this part of the guide.
To cancel this report definition process	Press F3 to go to the Report Definition Options screen. Press F3 again to display the Exit Options window. Type **2** and press Enter to exit without saving your work on this definition.

Selecting Fields

Accessing the Select Fields Screen

The following table specifies how to access the Select Fields screen from the other report definition screens.

Screen	Action
Report Definition Options	Type any character in the *Sel* field next to the Select Fields entry and press Enter.
Select Files	If using the *Create/Copy* function to create a new report definition, press Enter. If using the *Create/Copy* function to copy and edit an existing definition or using the *Modify* function, press F3 to return to the Report Definition Options screen. Type any character in the *Sel* field next to the Select Fields entry and press Enter.
Format Report Columns	If using the *Create/Copy* function to create a new report definition, press F9 for previous screen. Otherwise, press F3 to return to the Report Definition Options screen. Type any character in the *Sel* field next to the Select Fields entry and press Enter.
Any other report definition screen	Press F3 to display the Report Definition Options screen and type any character in the *Sel* field next to the Select Fields entry and press Enter.

The system displays the Select Fields screen illustrated on the following page.

The Select Fields Screen

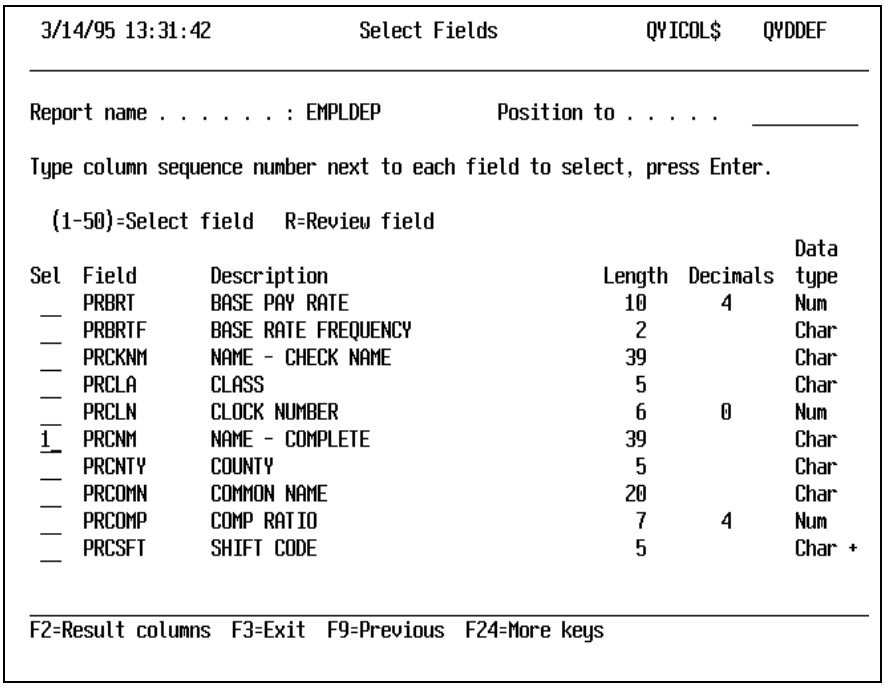


Figure 4-11: Select Fields screen

This screen lists the fields you are authorized to access in the file or files previously selected at the Select Files screen. The system lists the fields for the primary file, then lists the fields for each additional file, if any.

The last entry in Figure 4-12 illustrates the heading marking a new file.

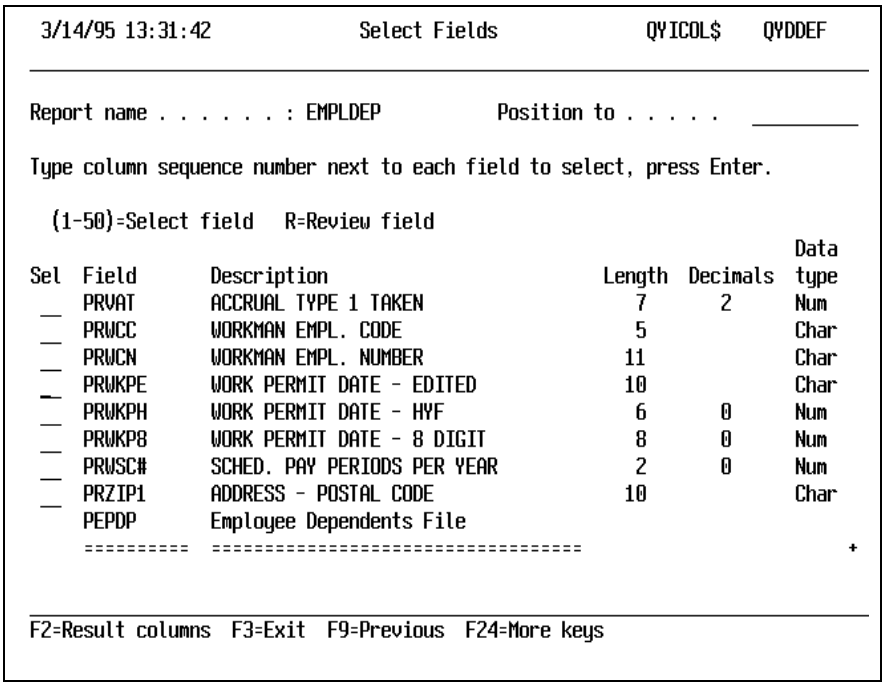


Figure 4-12: Select Fields screen showing header for next file's fields

Finding and Reviewing a Field before Selection

Perform the following steps to find fields and, if necessary, to review information about that field:

1. If necessary, press PgDn to find a field.

   If you know a field's name, you can type that name in the *Position to* field and press Enter. The cursor moves to that field in the list.

2. If you want more information about a field, type Enter in the *Sel* field next to the field's name.

   The system displays the Review Field panel.

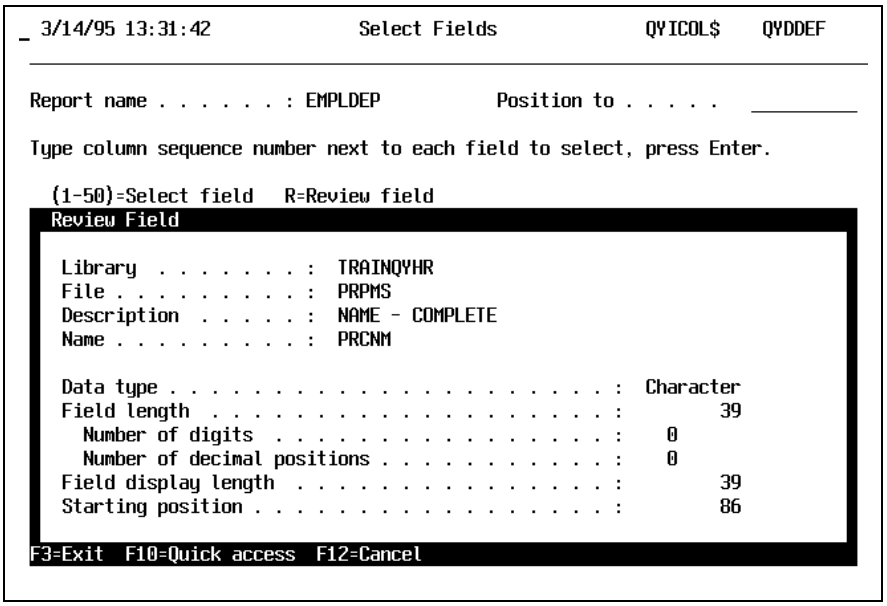


Figure 4-13: Select Fields screen review panel

Note: The *Starting position* field value on this screen indicates the character position at which this field begins within each record in the relevant database application file. This value is not the same as the starting position of the field's values in your report, as described in the Formatting Report Columns task later in Part 4 of this guide.

3. Press F12 to return to the Select Fields screen.

Selecting Fields to Establish Columns for the Report

Perform the following steps to select fields for the report definition, using your completed report design worksheets as a guide.

1. Press PgDn and PgUp, or use the *Position to* field, to move through the list of fields and find the fields to be selected.

   See the Finding and Reviewing a Field before Selection topic for typing Enter to check information about a listed field.

2. Type **1** in the *Opt* field next to the field to be used for Column 1.
3. Type **2**, **3**, **4** and so forth in the *Opt* field next to the fields to be used for additional columns in this report, that you need for data from which to construct derived values in result columns, or that you need for record selection criteria.

For result columns, refer to the Defining Result Columns task later in Part 4 of this guide. For selection criteria, refer to the Defining Selection Criteria task later in Part 4 of this guide.

Using the Design Worksheet

Note: You can speed up the field selection process by scrolling through the field list once working from your report design worksheet. Type the column number for each field as you come to that field and check the field off on your worksheet. When you reach the end of the field list, check the worksheet to see if you missed any fields.

Refer also to the Pressing F11 to Double-Check Your Field Selections subsection on the following page.

Selecting Date Fields

Caution: If you plan to do one of the following with a date field, be sure to select the field that has the date in Hundred Year Format:

- Perform calculations using this date, such as deriving and printing the number of days, months, or years until or since a dated event like benefit eligibility
- Use the date in any criterion for selecting records to be included in the report's output, such as specifying only employee records with a hire date after a specified date

Refer to the Working with Date Fields task later in Part 4 of this guide for details about the Hundred Year Format and date conversions that can apply.

Pressing F11 to Double-Check Your Field Selections

During or after selecting fields for the report definition, you can perform the following steps to confirm that you have selected all the right fields:

1. Press F11 to display the Selected Fields panel.

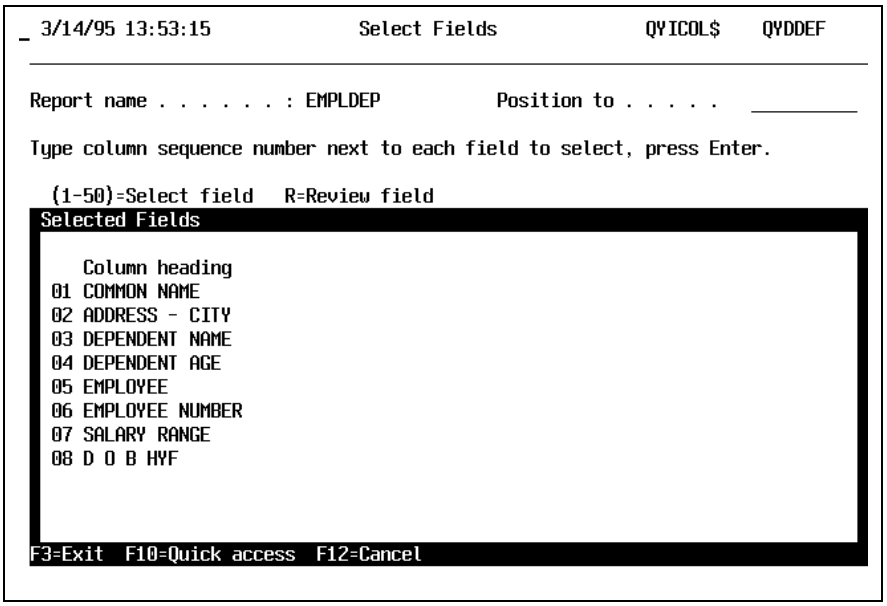


Figure 4-14: Selected Fields panel

2. Check that the fields you need are present and correctly numbered.

   Note: You can change the numbering and order of the columns at the Format Report Columns screen later in the definition process.

   You can leave gaps in the column numbering sequence but use the following guidelines for the order of columns:

   Ensure that the first column is numbered **1**.

   Ensure that columns that you do not plan to print and are selecting solely for joining files, for use in selection criteria, or for deriving values in result columns are assigned higher numbers than those fields that are to be printed in the report output.

3. When done, press F12 to return to the Select Fields screen.

Pressing F2 to Define Result Columns

Instead of following the regular screen sequence, which defers result column definition until later, you can press F2 at the Select Fields screen to go directly to the Define Result Columns screen.

Use the definition procedure in the Defining Result Columns task later in Part 4 of this guide. When done defining result values, press F3 to return to the Select Fields screen.

Exiting the Select Fields Screen

When done selecting fields, choose one of the following actions.

Goal	Action
To continue the *Create/Copy* function report definition sequence	If using *Create/Copy* to create a new report definition, press Enter to continue to the Format Report Columns screen. Go to the Formatting Report Columns task later in Part 4 of this guide. If using *Create/Copy* to copy and edit an existing report definition, press F3 to return to the Report Definition Options screen and select your next task.
To return to the previous screen	Press F9. If using the *Create/Copy* function to create a new definition, return to the Selecting Files task earlier in Part 4 of this guide. If you are using the *Create/Copy* function to copy and edit a definition or using the *Modify* function, the system returns to the Report Definitions Options screen. Select your next task.
To go to the Report Definition Options screen	Press F3. Go to the Using the Report Definition Options screen task later in Part 4 of this guide.
To cancel this report definition process	Press F3 to go to the Report Definition Options screen. Press F3 again to display the Exit Options window. Type **2** and press Enter to exit cancelling your creation or modification work on this definition.

Working with Date Fields

Types of Date Formats

Formats for Date Entry and Display

Infinium database applications often use the same date entry in a variety of formats. The format for displays and report outputs is typically defined at your site in the database application's entity controls.

The following table illustrates three of the possible formats.

Date Field Entry	Example
MMDDYYYY	**01011995**
MM/DD/YYYY	**01/01/1995**
YYYYMMDD	**19950101**

The Hundred Year Format for Calculations

In addition to date formats used for display and printing, Infinium applications use a special date format for calculating dates and time periods. This special format is called the Hundred Year Format.

TODAY as a Selection Criterion Date Value

Infinium QY lets you specify that you want the system to use today's date in selection criteria. **TODAY** means the date you generate the report.

The following pages provide more information about these topics:

- Understanding the Hundred Year Format
- When to select a Hundred Year Format (HYF) date field
- Converting an HYF field value to a standard date format
- Converting a typed selection criterion date to HYF
- Using **TODAY** as a date value

Understanding the Hundred Year Date Format

The Hundred Year Format (HYF) is the standard application date field format used for performing calculations in Infinium applications.

A Hundred Year Format date value consists of the number of days that have elapsed since January 1, 1900 as of the specified date. January 1, 1900 is defined as **0** in the Hundred Year Date format.

The following table contains examples of HYF dates:

Calendar Date	Hundred Year Format
January 1, 1900	0
January 1, 1995	34699
January 2, 1995	34700
January 3, 1995	34701

January 1, 1995 is 34699 days after January 1, 1900, January 2 is 34700 days after January 1, 1900, and so forth.

When to Select a Hundred Year Format (HYF) Date Field

During field selection for a report definition, you may find the system lists the same date data element in two or three formats as two or three separate fields. Infinium QY needs the Hundred Year Format to perform mathematical tasks. Select the Hundred Year Format version if you plan to do either of the following:

- Specify calculations using this date
- Specify record selection criteria using this date

If you also plan to display or print the date in report output, you can specify conversion of the date to a standard format meaningful to the report reader, as described on the following page.

Converting an HYF Field Value to a Standard Date Format

If you are using a date for calculation or selection and also including that date in report output, select the HYF field for that date and then specify conversion of that date to a standard format for report output.

Perform the following steps to convert an HYF date to the standard format for display and printing of a report.

1. At the Format Report Columns screen described later in Part 4 of this guide, type **1** in the *Edit* column next to the HYF entry you want displayed and printed in the standard format.
2. Press Enter.

   The system displays the Column Edit Options window.

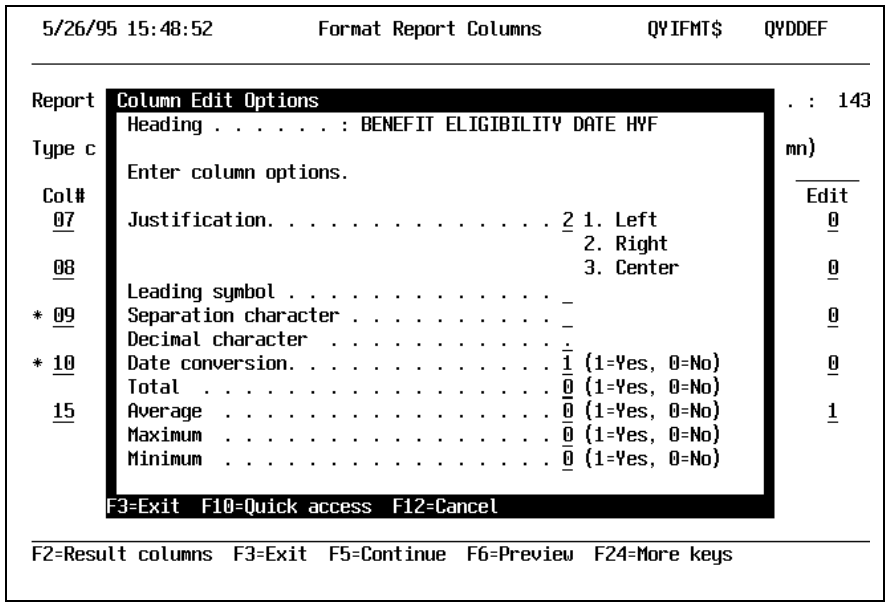


Figure 4-15: Column Edit Options window

3. Type **1** in the *Date conversion* field next to the entry you want displayed and printed in standard format on the report output.
4. Press F3 to return to the Format Report Columns screen.

Note: The Formatting Report Columns instructions later in Part 4 of this guide explain the uses of the other fields in the Column Edit Options window.

Converting a Typed Selection Criterion Date to HYF

Infinium QY needs the Hundred Year Format for dates used in selection criteria involving date comparison calculations. You can type this date in the *Value* field at the Define Selection Criteria screen described later in Part 4 of this guide, or you can use the optional Convert to Hundred Year Format window to verify the HYF date for these calculations.

Perform the following steps to use this optional window.

1. At the Define Selection Criteria or Expanded Selection Criteria screen, position the cursor in the relevant column and press F6. The system displays the Convert to Hundred Year Format window.

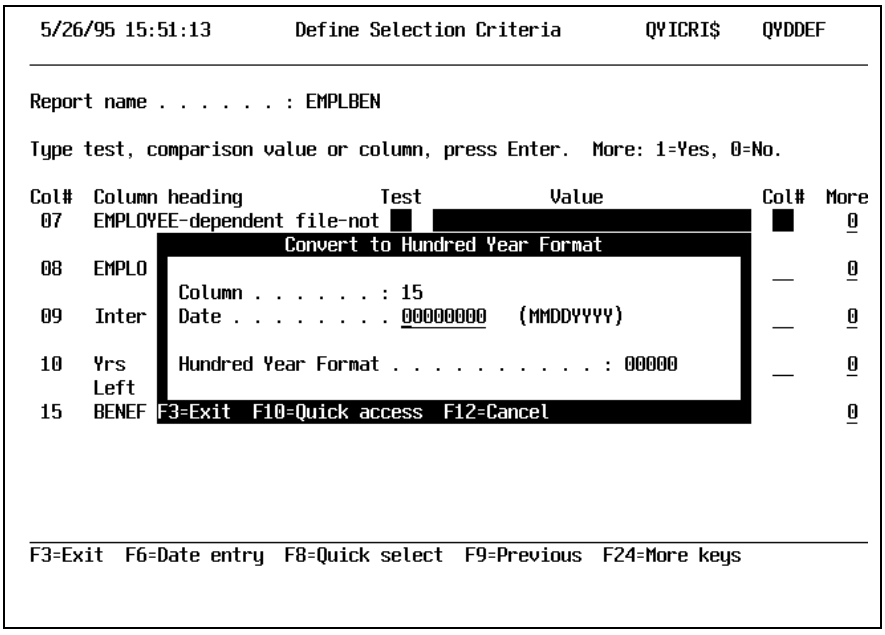


Figure 4-16: Convert to Hundred Year Format window

2. In the *Date* field, type the date in MMDDYYYY format, such as **01011995** for January 1, 1995.
3. Press Enter. The system displays the HYF version of the specified date in the *Hundred Year Format* field.
4. Press F3 to return to the selection criteria screen. The system displays the date in MMDDYYYY format in the *Value* field.

Note: Infinium QY thereafter uses the HYF value for calculations. Infinium QY still displays and prints the date in standard format for reference on the Infinium QY screens and on the Batch Selection

Criteria page, if you set the date conversion flag in the Column Edit Options window.

Using TODAY as a Date Value

Infinium QY lets you type **TODAY** at the following locations to specify the date on which you generate the report:

- The *Value* field at the Define Selection Criteria screen.
- The *Value* field at the Define Result Column screen.

Examples of when to use **TODAY** follow.

- At the Define Selection Criteria screen:

  To specify including a record if the value in a particular field is less than (that is, earlier than) **TODAY**, the date the report is being run

  To specify including a record if the value in a particular field is equal to (that is, the same as) **TODAY**, the date the report is run

  To specify including a record if the value in a particular field is greater than (that is, later than) **TODAY**, the date the report is run

- At the Define Result Columns screen:

  To subtract **TODAY** from a benefit eligibility date and print the result to tell how many days remain until the employee is eligible

Refer to the Defining Selection Criteria and Defining Result Columns tasks later in Part 4 of this guide for more information about using the *Value* field at these screens.

Formatting Report Columns

Accessing the Format Report Columns Screen

The following table specifies how to access the Format Report Columns screen from the other report definition screens.

Screen	Action
Report Definition Options	Type any character in the *Sel* field next to the Format Report Columns entry and press Enter.
Select Fields	If using the *Create/Copy* function to create a new report definition, press Enter. If using the *Create/Copy* function to copy and edit an existing definition or if using the *Modify* function, press F3 to return to the Report Definition Options screen. Type any character in the *Sel* field next to the Format Report Columns entry and press Enter.
Define Selection Criteria	If using the *Create/Copy* function to create a new report definition, press F9 for previous screen. Otherwise, press F3 to return to the Report Definition Options screen. Type any character in the *Sel* field next to the Format Report Columns entry and press Enter.
Any other report definition screen	Press F3 to display the Report Definition Options screen. Type any character in the *Sel* field next to the Format Report Columns entry and press Enter.

The system displays the Format Report Columns screen, illustrated on the following page.

The Format Report Columns Screen

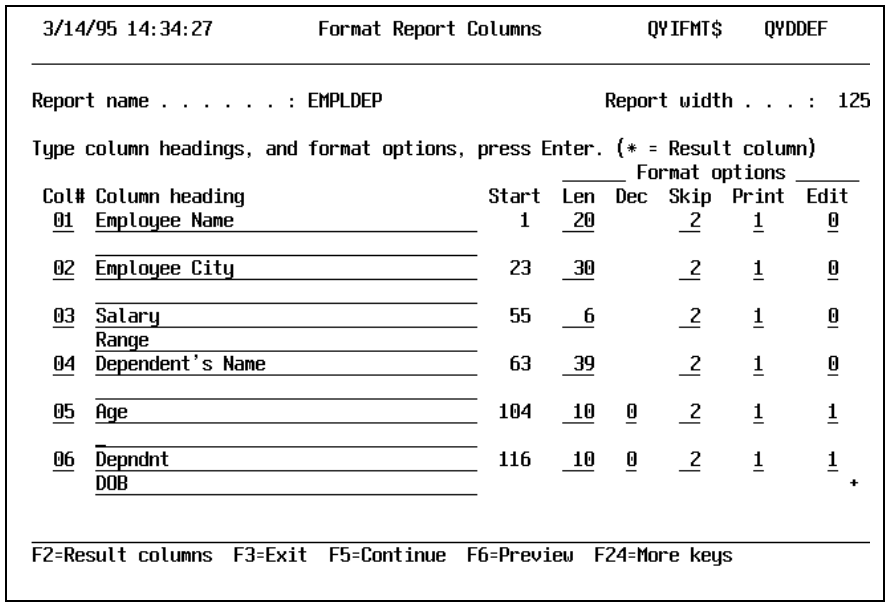


Figure 4-17: Format Report Columns screen

The Format Report Columns screen displays a list of the columns specified at the Select Fields screen. Each selected field is listed as a column. The columns are numbered in the order in which the fields were numbered at the Select Fields screen or as modified by an earlier session at this Format Report Columns screen.

This screen lets you specify the structure and format of the report.

The following pages explain these uses of this screen:

- Editing the displayed format fields
- Editing additional format fields at a pop-up window
- Accessing screens to define result columns
- Re-Displaying an Updated Format Report Columns screen
- Checking the column and report widths
- Previewing the report output format
- Exiting the Format Report Columns screen

Caution: Since pressing Enter at this screen refreshes the display to let you review your changes and the resulting report width, you must press F5 to continue to the next screen.

Editing the Displayed Format Fields

Use the following information to edit the displayed format fields:

Col #

You can edit the *Col #* field for the following purposes.

Task	Action
To change the order of columns	Renumber the columns. **Note:** You can leave gaps in the numbering sequence, but ensure that the first column is numbered **`01`** or **`1`**. Also ensure that columns not to be printed have higher numbers than all the columns to be printed.
To delete a column	Blank out the number for that column. **Note:** This is the only way to delete a calculated (result) column. You can delete a regular field-specific column by blanking out the number either here or at the Select Fields screen.

Column heading

The default column heading is the field's description. Edit this value to customize the heading to be printed on the report for this column. You can use one or two lines for the heading.

Note: Changes here affect only the report output. They do not affect the field descriptions in the database file.

Start

The *Start* field tells you the character position where this column begins in the report output. The system adjusts the *Start* display as indicated later when you have made edits to the *Len, Dec,* or *Skip* fields.

Len

The *Len* field tells you how many characters wide the column is. If you edit this field, ensure that the number you type allows for the following:

The width of the column heading (or edit the column heading to fit)

The longest value the system might find for this field

If the system cannot print a whole numeric value in a column, the system uses an overflow string for the value, like this: **`****`**

Dec

The *Dec* field specifies the number of decimal positions to use in a numeric column. This field is not used for alphanumeric values.

Skip

The *Skip* field specifies the number of blank spaces between columns. The default is **2**. You can edit this field to add blank space to a format.

Print

The *Print* field specifies one of the following.

Value	Meaning
1	Print this column on the report output.
0	Omit this column from the report output. **Note:** Type **0** for fields you included to be used only as the basis for calculations or other derived values or only for selection criteria. Number these columns higher than the columns you plan to print.

Edit

The *Edit* field lets you use additional format fields. See the next topic.

Editing Additional Format Fields

If you type **1** in the *Edit* field for any column, the system displays one of the following Column Edit Options pop-up windows with additional format fields:

- Column Edit Options window for numeric fields (including dates in the numeric Hundred Year Format)
- Column Edit Options window for alphanumeric fields (including dates in the alphanumeric format containing slashes)

Editing Additional Format Fields for Numeric Data

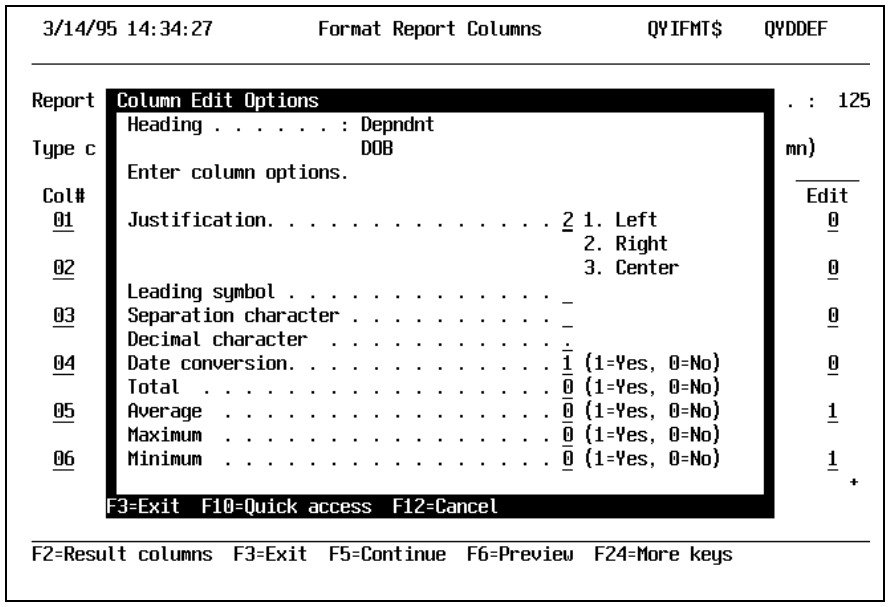


Figure 4-18: Column Edit Options window for numeric fields

The Column Edit Options window for numeric fields identifies the field you chose to edit and lets you specify format options in the following fields:

Justification

Type **1** to left justify the values (start printing in the first character position in the column), type **2** to right justify the values (print so that each value's last character is in the last position in the column), or type **3** to center the values in this column.

Leading symbol

Type the symbol, if any, you want printed before each value in this column. Examples: $ for dollar amounts, **£** for pounds, **¥** for Japanese yen, or any other character for any type of numeric value.

You are not limited to monetary symbols or fields. You can use any character with any numeric field.

Separation character

Type the character, if any, you want used to mark off every set of three digits in this column.

Example: Type a comma to mark off thousands as in the American and English numeric value **5,702,986**, or type the period used in most European countries to mark off thousands as in **5.702.986**.

Decimal character

Type the character you want used to indicate where decimal values begin, such as a decimal point (period, the default value) as used in

America and England, or a comma as used in most European countries.

Examples: A decimal number expressed in America as **10.5** may be expressed in many other countries as **10,5**.

Date conversion

Type **1** to convert a date field from the Hundred Year Format such as **34699** to a normal alphanumeric format such as **01JAN95** for printing and display in the report output. Refer to the Working with Date Fields section earlier in Part 4 of this guide for an explanation of these formats.

Total, Average, Maximum, Minimum

Type **1** in the appropriate field if you want the report to include the total of the values in this column, the average of the values in this column, the maximum value in this column, or the minimum value in this column.

If you type **1** in more than one of these fields, the system prints each of the specified values with their labels on sequential lines at the end of the report. If you defined groups for the report, the system also prints these values at the end of each group.

Note: If you total a column at the Formatting Report Columns screen, group and sort the columns in numerical order at the Define Sort and Grouping Options screen later in the definition process. For example, if you total Column 3, also group Columns 1 and 2. Make Column 1 the primary sort, Column 2 the secondary sort, and Column 3 the third sort.

For more information about sorting and grouping, refer to the Defining Sort and Group Options section later in Part 4 of this guide.

When done specifying the additional format elements, press F3 to return to the Format Report Columns screen.

Editing Additional Format Fields for Alphanumeric Data

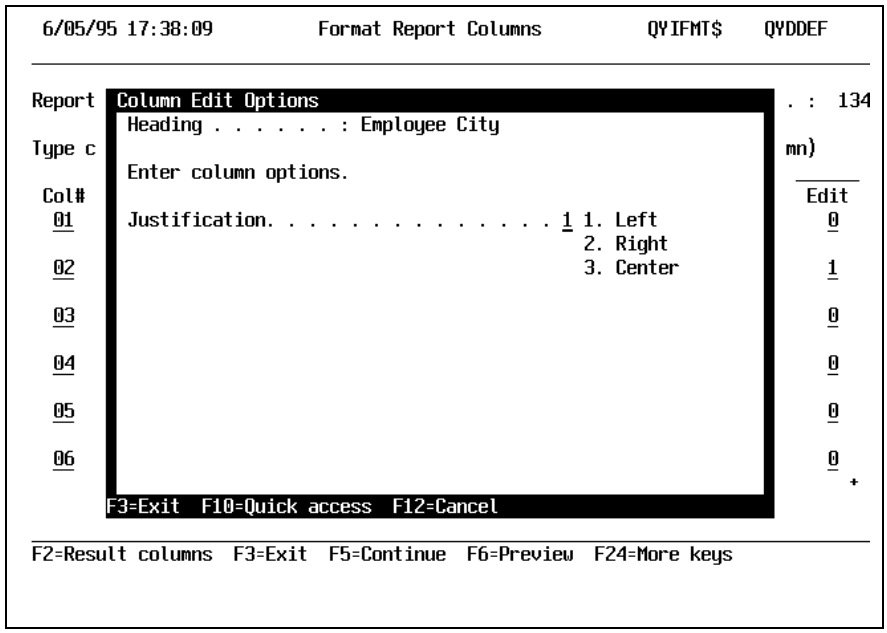


Figure 4-19: Column Edit Options window for alphanumeric fields

The Column Edit Options window for alphanumeric fields lets you indicate the justification of the values in the specified column as follows.

Type	Justification	Example
1	Left justify the values in this column. That is, start printing each value in the first position of the column.	Brown Chen Montebello Ngo
2	Right justify the values in this column. That is, print each value so that the last character in the value is printed in the last position of the column.	Brown Chen Montebello Ngo
3	Center the values in this column.	Brown Chen Montebello Ngo

When done specifying the justification for this report column, press F3 to return to the Format Report Columns screen.

Accessing Screens to Define Result Columns

Result columns are columns with values derived from the values in other columns through calculations or concatenations (stringing values or parts of values together). For example, you can define a result column that adds one year to the values in an employee hire date column, in order to list when each new hire is eligible for a benefit such as a 401(k) plan.

The standard Create/Copy screen sequence takes you to the Define Result Columns screen after you have completed the Format Report Columns, Define Selection Criteria, and Define Sort and Grouping Options screens. Some people, however, prefer defining result columns now, while they are working with column formats.

The system therefore lets you move directly from the Format Report Columns screen to the Define Result columns screen.

Perform the following steps to use this option:

1. At the Format Report Columns screen, press F2.

   The system displays the Define Result Columns screen.
2. Follow the procedure described in the Defining Result Columns task later in Part 4 of this guide.
3. When you press F3 to exit the Define Result Columns screen, the system returns you to the Format Report Columns screen.

Re-Displaying the Updated Screen

If you edited the *Col #*, *Len*, *Dec*, or *Skip* fields, press Enter to refresh the Format Report Columns screen.

Refreshing the display also updates the *Start* field values.

Checking the Column and Report Widths

After refreshing the Format Report Columns screen display ensure the following:

- All columns are wide enough to include the largest possible value.

If a numeric column is too small, the report output has the overflow symbol ********. If an alphanumeric column is too small the report output truncates characters that do not fit.

- The report is no more than 255 characters wide, including the total of the column widths for printed columns plus the total number of skipped spaces.

  Check the *Report width* field at the top right of the screen.

Previewing the Report Output Format

At the Format Report Columns screen, press F6. The system displays the Preview Report Output panel.

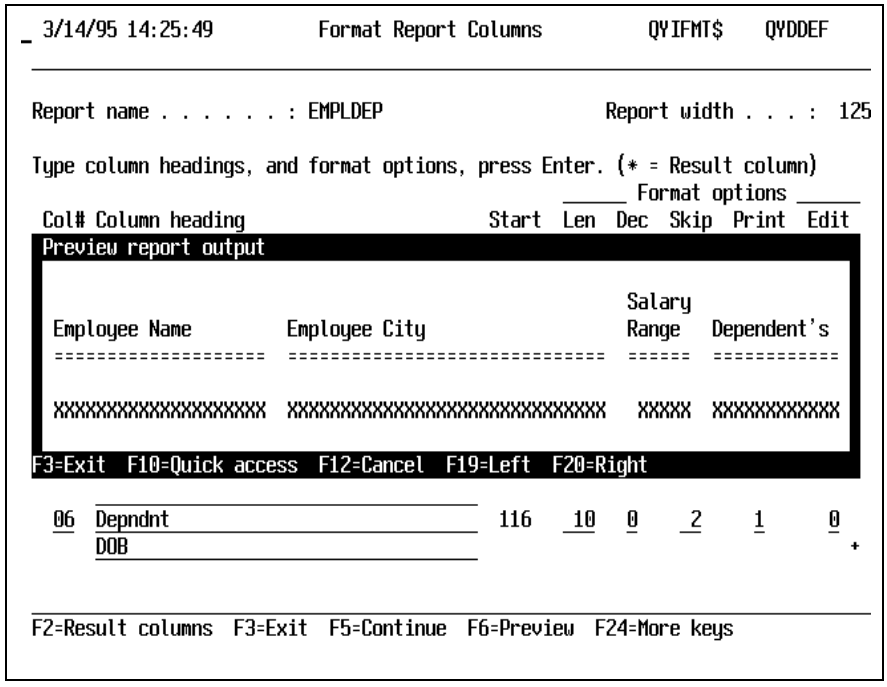


Figure 4-20: Preview Report Output panel (beginning of output format)

Press F20 to shift the display and view the rest of the preview image.

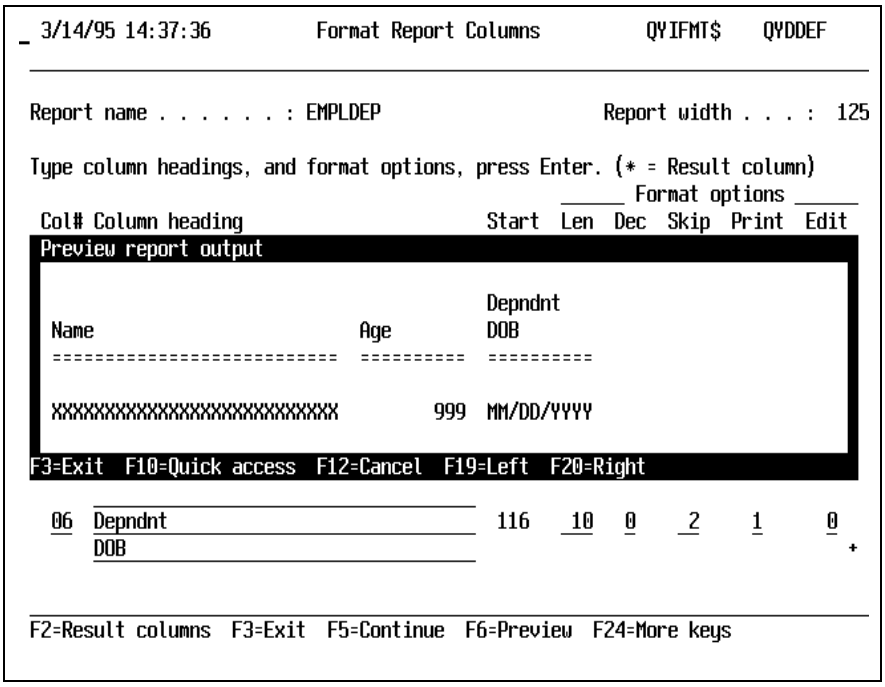


Figure 4-21: Preview Report Output panel (rest of output format)

Press F19 to shift the display back toward the beginning again.

Exiting the Format Report Columns Screen

When done formatting columns, choose one of the following actions.

Goal	Action
To continue the *Create/Copy* function report definition sequence	If using the *Create/Copy* function to create a new report definition, press F5 to continue to the Define Selection Criteria screen. Go to the Defining Selection Criteria task later in Part 4 of this guide. If using the *Create/Copy* function to copy and edit an existing report definition, press F3 to return to the Report Definition Options screen and select your next task.
To return to the previous screen	Press F9. If using the *Create/Copy* function to create a new definition, return to the Select Fields task earlier in Part 4 of this guide. If you are using the *Create/Copy* function to copy and edit a definition or using the *Modify* function, the system returns you to the Report Definitions Options Screen. Select your next task.
To go to the Report Definition Options screen	Press F3. Go to the Using the Report Definitions Options Screen task later in Part 4 of this guide.
To cancel this report definition process	Press F3 to go to the Report Definition Options screen. Press F3 again to display the Exit Options window. Type **2** and press Enter to exit without saving your work on this definition.

Defining Selection Criteria

Accessing the Define Selection Criteria Screen

The following table specifies how to access the Define Selection Criteria screen from the other report definition screens.

Screen	Action
Report Definition Options	Type any character in the *Sel* field next to Define Selection Criteria entry and press Enter.
Format Report Columns	If using the *Create/Copy* function to create a new report definition, press F5. If using the *Create/Copy* function to copy and edit an existing definition or if using the *Modify* function, press F3 to return to the Report Definition Options screen. Then type any character in the *Sel* field next to Define Selection Criteria entry and press Enter.
Define Joins and Join Options (or, for single-file reports only, Define Sort and Grouping Options)	If using the *Create/Copy* function to create a new report definition, press F9 for previous screen. Otherwise, press F3 to return to the Report Definition Options screen. Then type any character in the *Sel* field next to Define Selection Criteria entry and press Enter.
Any other report definition screen	Press F3 to display the Report Definition Options screen. Then type any character in the *Sel* field next to Define Selection Criteria entry and press Enter.

The system displays the Define Selection Criteria screen, illustrated on the following page.

Overview of Defining Selection Criteria

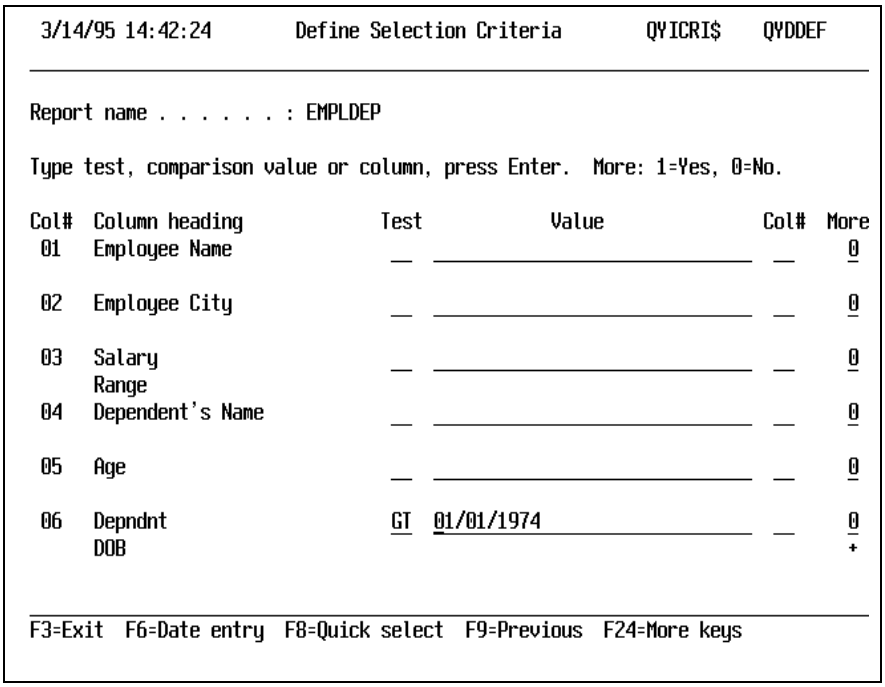


Figure 4-22: Define Selection Criteria screen

The Define Selection Criteria screen lets you specify which records the system is to gather data from when generating the report. For example, you can tell the system to gather data only from records for employees who have a dependent born after January 1, 1974, as illustrated in Figure 4-22. **GT** means "greater than"; for dates, "greater" means "later."

The following pages summarize the kinds of tests you can specify, and then provide details about special procedures such as using wildcards and date fields in the selection tests.

Using Exact Values in Tests

When typing values to be used for selection tests, be sure to match exactly the way the system stores the data. The system selects only records that have values exactly matching the test you specify, including:

- Capital and lowercase letters (such as **Hyannis**, not **HYANNIS,** if your local conventions include upper and lower case addresses)
- Right or left justification (that is, type the value starting at the beginning of the *Value* field if the records have the values left-justified, and type the value at the right end of the *Value* field if the records have the value right-justified)

The following table summarizes tasks you can perform at this screen.

Task	Action
Test a field in each record against a value you type	Type a Test Operator in the *Test* field. The Test Operators are as follows: **EQ** Equal to **GE** Greater than or equal to **LE** Less than or equal to **NE** Not equal to **GT** Greater than **LT** Less than **CT** Containing Then type a value in the *Value* field. Example: To select only Hyannis employees, type **EQ** in the *Test* field and **Hyannis** in the *Value* field. Refer to the Using Dates in Selection Criteria subsection later in this Defining Selection Criteria section for details about typing dates.
Test a field in each record against a value in another column	Type a Test Operator in the *Test* field. Leave the *Value* field blank. In the *Col#* field to the right of the *Value* field, type the number of the column to be used in the test. Example: You want all payment transactions whose amounts do not match the related invoice. Include the payment and the invoice amount fields as Columns 10 and 11. For Column 10, type **NE** in the *Test* field, and **11** in the *Col#* field to the right of the *Value* field.
Use wildcards in the *Value* field	You can use a wildcard such as ***** in the *Value* field. Example: To limit the report output to employees who live in the 02600 to 02699 Zip code range, type **EQ** in the *Test* field and type **026*** in the *Value* field. Refer to the Using Selection Criteria Wildcard Characters subsection later in this Defining Selection Criteria section for details.
Use tests with two or more criteria	To apply multiple tests to the same field with and/or logic, type **1** in the *More* field to display the Expanded Selection Criteria screen and type additional tests. Refer to the Using Multiple Selection Criteria Tests for a Single Field subsection later in this Defining Selection Criteria section for details.

Listing the Available Test Operators

Press F11 at the Define Selection Criteria screen or the Expanded Selection Criteria screen to display the Test Operators reference panel.

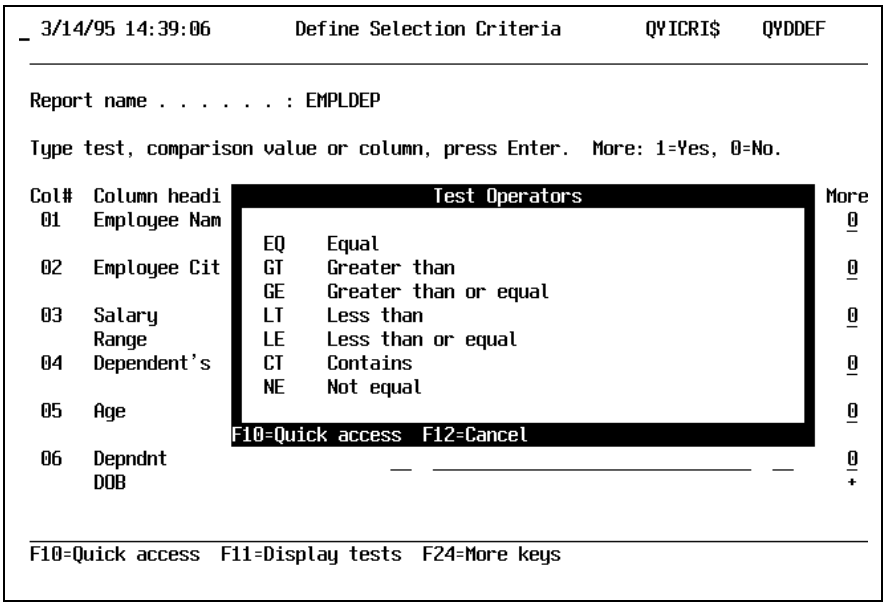


Figure 4-23: Define Selection Criteria screen with Test Operators panel

Press F12 to return to the relevant selection criteria screen.

Using Selection Criteria Wildcard Characters

The following table explains the wildcard characters you can use in the *Value* field for your selection tests.

Wildcard Character	Explanation	Examples
*	The asterisk represents one or more characters.	Type **A*** for all records with values that begin **A**, such as **Alfred** or **Andersen**. Type **026*** for all records with Zip codes values that begin **026**, such as **02601** and **02653**. Type ***4100*** for all records with values that contain **4100** in any value position, such as account number **001-003-4100-224**.
.	The period represents a single character in the specified position.	Type **H.T** to select records with any value that begins **H**, ends **T**, and has a single character between the **H** and the **T**, such as **HAT**, **HOT**, **HIT**, and **HBT**.
\	The backslash means the following character is to be used as part of the value itself, not as a wildcard character.	Type ***FICA** or ***FWT** to select records with values ***FICA** or ***FWT** for Infinium Payroll reports that include hard-coded deductions.

Using Multiple Selection Criteria Tests for a Single Field

Basic Example

Suppose you want to limit your report to only employees living in Hyannis or adjacent towns Centerville, Barnstable, and South Yarmouth.

1. At the Define Selection Criteria screen, type **1** in the *More* field to display the Expanded Selection Criteria screen.

   Note: The *More* field may still display **1** from a previous occasion on which you or another user accessed the Expanded Selection Criteria screen. You must retype the **1** in the *More* field each time you need to repeat that access.

2. At the Expanded Selection Criteria screen, type the appropriate operators and tests as illustrated in Figure 4-24.

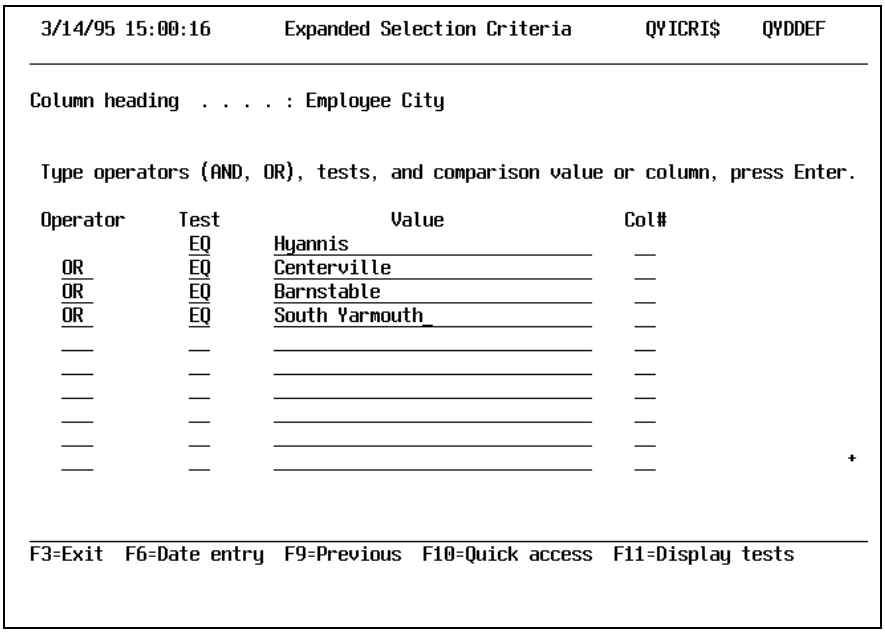


Figure 4-24: Expanded Selection Criteria screen

Using the AND and OR Operators

The following table explains the operators used to combine multiple selection criteria tests for a single field.

Operator	Meaning
AND	Include records that pass this test in addition to the preceding test or tests. Example: Using **CT S AND CT E** for the common name field includes records for employees named **S**u**e**, **S**h**e**rman, and **S**h**e**lly, because these names contain both S and E. Sam, Egbert, and Joe are excluded because they do not have both.
OR	Include records that pass this test, even if they failed a preceding test. Example: Specifying **CT S OR CT E** for the common name field includes records for employees named **S**u**e**, **S**h**e**rman, **S**h**e**lly, **S**am, **E**gbert, and Jo**e**, because these names all contain at least one S or E.

Caution: Avoid following an **OR** operator with an **NE** test. This combination tells Infinium QY to select all records that do not have a given value in this field, whether or not they passed other tests for this field. The results are typically undesirable.

Returning to the Define Selection Criteria Screen

When done specifying additional selection criteria for the currently-selected field, press F3 to return to the Define Selection Criteria screen.

Using Dates in Selection Tests

Restriction

The only date fields you can use for *Value* field selection tests are fields in the Hundred Year Format. The system needs this format to perform the arithmetic calculations required by comparisons.

Refer to the Working with Date Fields section earlier in Part 4 of this guide for more information about the Hundred Year Format for dates and working with dates.

Typing Dates in the *Value* Field

Use the MM/DD/YYYY format when typing a date in the *Value* field. Example: type **09/15/1995** for September 15, 1995.

You must include the slashes and all four year digits.

Pressing F6 to identify a HYF Equivalent

If you selected a Hundred Year Format date field at the Select Fields screen for use in a selection test, type the date in the MM/DD/YYYY format in the *Value* field. The system uses the HYF version of the date for the selection test. You do not need to know what the HYF expression of that date is.

If you want to check the HYF value for any given date, however, perform the following steps at the Define Selection Criteria screen or the Expanded Selection Criteria screen:

1. Press F6 to display the Convert to Hundred Year Format window.
2. Type the date in the MMDDYYYY format without slashes.

   Example: Type **09151995** for September 15, 1995.

   The system displays the equivalent HYF expression of the date in the *Hundred Year Format* field.
3. Press F3 to return to the Define Selection Criteria or Expanded Selection Criteria screen.

This information is just for your reference. You do not need to rekey the information.

Typing TODAY in the Value Field

If you want a selection test to use the current date, meaning the date the report is being generated, type **TODAY** in the value field. The system reinterprets **TODAY** each time you run the report.

Exiting the Define Selection Criteria Screen

When done defining the report's criteria for selecting records to be used in the report output, choose one of the following actions.

Goal	Action
To continue the *Create/Copy* function report definition sequence	If using the *Create/Copy* function to create a new report definition, press F5 to continue to the next screen in the standard sequence. • If you selected two or more files at the Select Files screen, the system displays the Define Joins and Join Options screen. • If you selected only one file at the Select Files screen, the system displays the Define Sort and Grouping Options screen. Go to the applicable section later in Part 4 of this guide. If using the *Create/Copy* function to copy and edit an existing report definition, press F3 to return to the Report Definition Options screen and select your next task.
To return to the previous screen	Press F9. If using the *Create/Copy* function to create a new definition, return to the Formatting Report Columns task earlier in Part 4 of this guide. If you are using the *Create/Copy* function to copy and edit a definition or using the *Modify* function, the system returns you to the Report Definitions Options Screen. Select your next task.
To go to the Report Definition Options screen	Press F3. Go to the Using the Report Definitions Options Screen task later in Part 4 of this guide.
To cancel this report definition process	Press F3 to go to the Report Definition Options screen. Press F3 again to display the Exit Options window. Type **2** and press Enter to exit without saving your work on this definition.

Joining Files through Shared Fields

Accessing the Define Joins and Join Options Screen

The following table specifies how to access the Define Joins and Join Options screen from the other report definition screens.

Note: The system omits the Define Joins and Join Options screen from the standard sequence if you selected only one file at the Select Files screen.

Screen	Action
Report Definition Options	Type any character in the *Sel* field next to the Define Joins and Join Options entry and press Enter.
Define Selection Criteria	If using the *Create/Copy* function to create a new multi-file report definition, press Enter. If using the *Create/Copy* function to copy and edit an existing definition or if using the *Modify* function to work on a multi-file report, press F3 to return to the Report Definition Options screen. Then choose Define Joins and Join Options as above.
Define Sort and Grouping Options	If using the *Create/Copy* function to create a new multi-file report definition, press F9 for previous screen. Otherwise, press F3 to return to the Report Definition Options screen. Then choose Define Joins and Join Options as above.
Any other report definition screen	Press F3 to display the Report Definition Options screen. Then choose Define Joins and Join Options as above.

The system displays the Define Joins and Join Options screen, illustrated later in Figure 4-25.

About Joining Files and Specifying a Join Type

When you define a single-file report, specify selection criteria, and generate the report, the system reads each record in the target file. The system applies the selection criteria to each record in order to determine whether or not to include data from that record in your report.

When you define a multi-file report, specify selection criteria, and generate the report, the system needs at least one join field to tie the data in the primary file to data in the next file. The system needs this connection in order to compare the related records in the two files and to identify which secondary file records, if any, to select for each selected primary file record.

In addition, the selection of the primary file records for a multi-file report depends not only on the selection criteria for fields in the primary file, but also on the type of joining you specify. Infinium QY lets you specify which of the following join type rules to apply.

Join Type	Rule
Matching Join Fields	Include only primary file records that have a qualifying secondary-file matching record **Note:** Forced joins, explained later in this section, are always set to the Matching Join Fields join type. If you change the join type for a forced join, the system automatically returns the type to Matching Join Fields.
Unmatched Join Fields	Include only primary file records that have no qualifying secondary-file matching record
Matched and Unmatched Join Fields	Include all selected primary file records whether or not they have a qualifying secondary-file matching record

Caution: If you plan to join three files together, ensure that you select as the primary file whichever file has the fields with the most selection tests. This can astronomically reduce processing time.

The following pages provide details and examples for specifying file joins and for using these join type options.

Defining the Join Fields

Using the Define Joins and Join Options Screen

The Define Joins and Join Options screen displays a list of the report's columns identified by column number, file, heading, field name, field length and, if applicable, number of decimal positions. The screen also provides a *Join To* field.

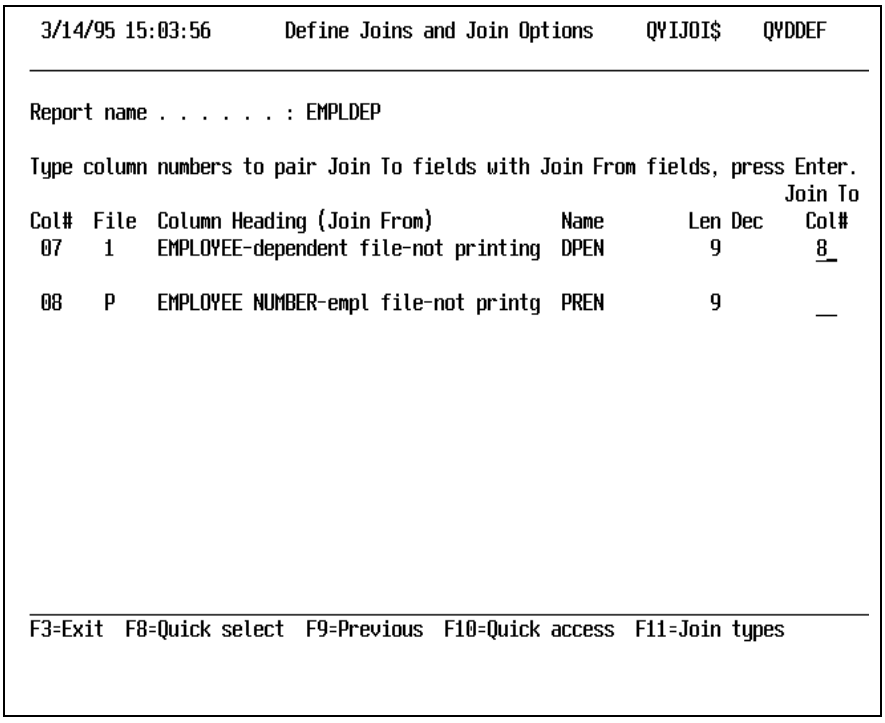


Figure 4-25: Define Joins and Join Options screen

To join the files through a common (shared) field, type the column number of that field from one file under *Join To* in the entry for the field in the other file. For example, in the preceding screen illustration the user typed **8** (the column number for the primary file's *Employee Number* field) under *Join To* in the entry for Column 7 (the secondary file's *Employee* field).

You need to specify the join only once, as in the preceding screen illustration. That is, you do not also have to type **7** in the *Join To* field for Column 8.

Caution: If you have multiple companies in your database for Infinium HR or Infinium OH, you must use both the employer identifier and the employee identifier when joining files through employee data. This is because the same employee identifier could be used in two or more company records.

Joining these pairs ensures that you identify the employee uniquely by specifying the unique combination of company and employee.

Deciding Which Fields are Common

Note the following when identifying the common fields for two files:

- To constitute a common field, a pair of fields in two files needs to describe the same fact in the same number or characters or digits. That is, the fields must have the same length and be of the same data type, such as alphanumeric.

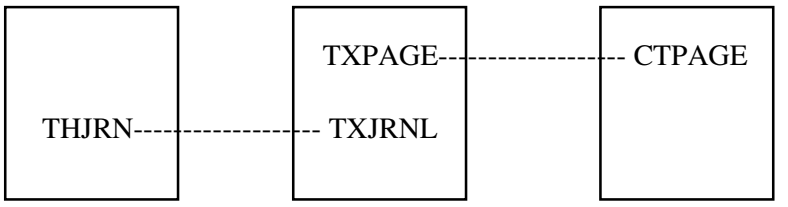
  For example, the employee identifier is nine characters long in both the Employee Root Master File and the Dependents File.

- The fields can have different names in the two files. For example, the employee identifier in the Employee Root Master File is PREN with description EMPLOYEE NUMBER whereas the employee identifier in the Dependents File is DPEN with description EMPLOYEE.

Joining Three Files

Sometimes you need to join a third file to a previously joined pair. For an example, refer to the Infinium General Ledger report definition in the Using a Physical File as Input for a New Report subsection later in Part 4 of this guide. That report lists the earliest 1995 sales transactions over $10,000 for each of several accounts.

When you join three files together, you can use one pair of common fields to join Files A and B, and then use a different pair of common fields to join Files B and C. You do not have to use the same field for all three files.



Forced Joins

The use of certain Infinium HR and Infinium OH files requires the application of complex security rules involving multiple files. Infinium

QY therefore requires and automatically defines certain joins for these files when you complete and run an applicable report definition.

For Infinium HR, certain files must be joined to file PRPMS. For Infinium OH, certain files must be joined to file EMPHM. You do not need to establish these joins. Infinium QY automatically defines the joins with appropriate fields and sets the join type to Matching Join Fields.

Defining the Join Type

Using the *Matching Join Fields* Option

When you join files, the system uses default join option *Matching Join Fields* to select only primary file records that meet the following tests:

- The primary file record passes primary file field selection tests
- A corresponding secondary file record passes selection tests you defined for the secondary file fields

That is, the system includes the selection tests for both the primary and the secondary file fields when determining whether to include the primary file record in the report. Refer to the example on the next page.

Note: Forced joins require the Matching Join Fields option.

Pressing F11 to Select a Different Join Type

Perform the following steps to select an alternative join type:

1. At the Define Joins and Join Options screen, press F11 to display the Select join type panel.

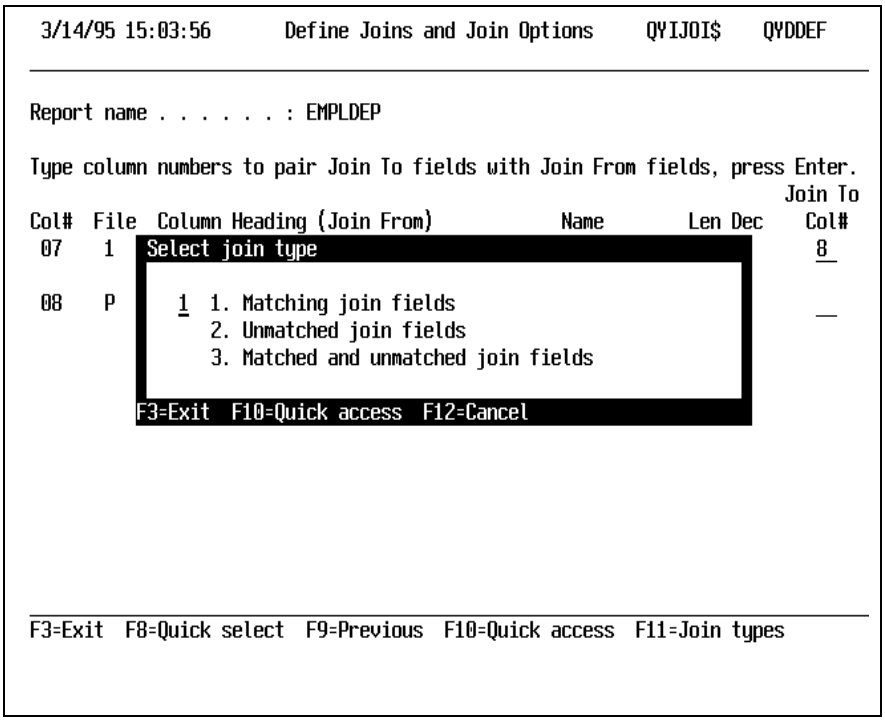
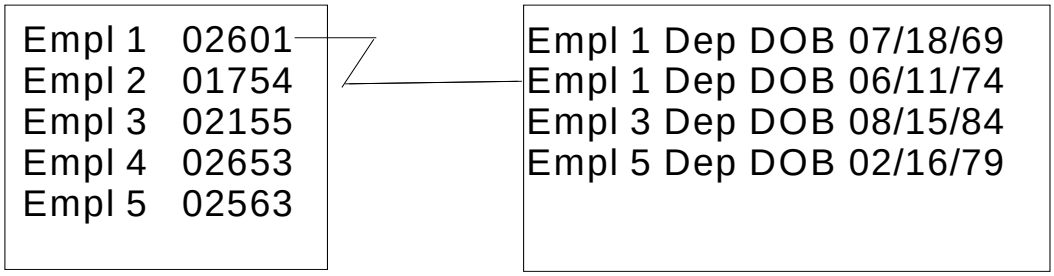


Figure 4-26: Select Join Type panel

2. Type **2** for unmatched or type **3** for matched and unmatched. Refer to the examples later in this section. **Note:** If you change the type for a forced join, the system returns the type to matching.
3. Press F3 to return to the Define Joins and Join Options screen.

This page and the following pages illustrate the results of the join types.

Matching Join Fields Option



Primary File
Selection: Zip = 026*

Secondary File
Selection: DOB GT

Process:

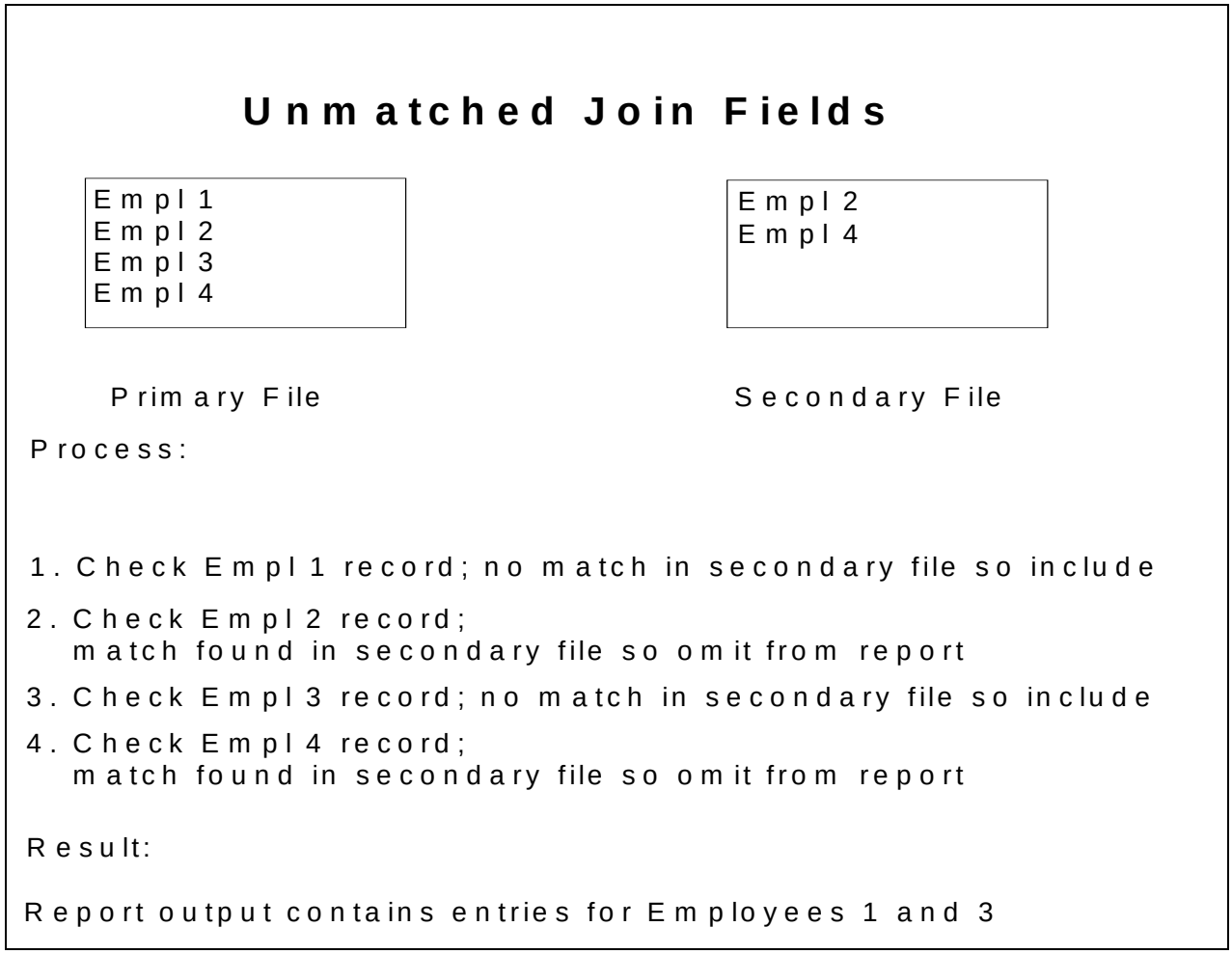
1. Reads primary file record 1; selects Empl 1 because Zip is in 026xx
2. Looks for secondary file records for Empl 1
   a. Finds Dep DOB 07/18/69 and does not select: Birthdate too early
   b. Finds Dep DOB 06/11/74 and selects record: Birthdate meets criterion
   c. Prints report output line for Empl 1 and Dep with 6/11/74 match found
3. Checks next primary file record; rejects because Empl 2 not in 026xx;
   Also rejects Empl 3 because not in 026xx
4. Checks next primary file record; selects Empl 4 because Zip is in 026xx
   a. Finds no Dep File record for Empl 4
   b. Therefore, omits Empl 4 from the report output because no match found
5. Checks next primary file record; rejects because Empl 5 not in 026xx

Result:

Report output contains only one record because only one full match found

Using the *Unmatched Join Fields* Option

If you specify the *Unmatched Join Fields* option, the system includes in the report only those primary file records that do not have a corresponding record in the secondary file. Use this option when you need to identify differences between files, as in the following example:



Other examples of using this option are as follows:

- List employees who have had no accidents and therefore have no records in the accident file.
- During conversion from Accounts Payable 2000 to Infinium Payables Ledger, identify companies that are in the former database but not yet in the latter database.

  Refer to the Using a Physical File as Input for a New Report section later in Part 4 of this guide for comparing a five-character Infinium PL company field with a three-character Accounts Payable 2000 company field by using an intermediate physical file.

Using *Matched and Unmatched Join Fields*

If you select the *Matched and Unmatched Join Fields* option, the system includes each primary file record that meets the selection criteria for primary file fields, whether or not there is also a qualifying secondary file record to be included in the report.

You can use this option, for example, to generate a list of all employees in the 026xx zip code area whether or not they have minor dependents. The report then includes details about the dependents in cases where there are any dependents.

Refer to the illustration on the following page for an example.

Matching and Unmatched Join Fields

Empl 1 Zip 02601	selected	Empl 1 Dep DOB 07/18/69
Empl 2 Zip 01754		Empl 1 Dep DOB 06/11/74
Empl 3 Zip 02155		Empl 3 Dep DOB 08/15/79
Empl 4 Zip 02653	selected	Empl 5 Dep DOB 02/16/79
Empl 5 Zip 02563		

Primary File
Employee Root Master
Selection: Zip = 026*

Secondary File
Dependents File
Selection: DOB GT

Process:

1. Reads primary file record 1; selects Empl 1 because Zip is in 026xx
2. Looks for secondary file records for Empl 1
   a. Finds Dep DOB 07/18/69 and does not select; birthdate too early
   b. Finds Dep DOB 06/11/74 and selects record; birthdate meets criterion
   c. Prints report output line for Empl 1 and Dep with 6/11/74
3. Checks next primary file record; rejects because Empl 2 not in 026xx
   Also rejects Empl 3 because not in 026xx
4. Checks next primary file record; selects Empl 4 becauseZip is in 026xx
   a. Checks for a matching Dep file record and finds none
   b. Includes Empl 4 in report leaving Dependent file values blank
5. Checks next primary file record; rejects because Empl 5 not in 026xx

Result:

- One entry in output has Dependent match and includes Dependent data
- Second entry in output has no Dependent match and has blanks for Dependent values

Exiting the Define Joins and Join Options Screen

When done defining the files joins for this report definition, choose one of the following actions.

Goal	Action
To continue the *Create/Copy* function report definition sequence	If using the *Create/Copy* function to create a new report definition, press Enter to continue to the Define Sort and Grouping Options screen. If using the *Create/Copy* function to copy and edit an existing report definition, press F3 to return to the Report Definition Options screen and select your next task.
To return to the previous screen	Press F9. If using the *Create/Copy* function to create a new definition, return to the Define Selection Criteria task earlier in Part 4 of this guide. If you are using the *Create/Copy* function to copy and edit a definition or using the *Modify* function, the system returns you to the Report Definitions Options screen. Select your next task.
To go to the Report Definition Options screen	Press F3. Go to the Using the Report Definitions Options Screen task later in Part 4 of this guide.
To cancel this report definition process	Press F3 to go to the Report Definition Options screen. Press F3 again to display the Exit Options window. Type **2** and press Enter to exit without saving your work on this definition.

Defining Sort and Group Options

Planning Group, Sort, and First-Match Criteria

The Define Sort and Grouping Options screen lets you group entries, sort entries, and limit entries to just the first matching record. The following paragraphs summarize each of these features.

Grouping Related Entries

You can activate grouping for a specific field such as employee address city name. This lets you do the following:

- Group all the entries that share the same value in that field
- Print summary information (and if specified at the Format Report Columns screen, column totals) followed by a break after each group

Example: You can group employees by city, printing summary information plus one or more blank lines or a page break after each city.

Sorting Related Entries

You can specify the order in which to list the entries. You can include primary and secondary sorts.

Example: You sort the report primarily by city. Within each city group, you use a secondary sort to list that city's employees alphabetically.

Printing Only First Matching Entry

Example: You want to include on your employee report the most recent date on which each employee was absent. You include an absence date field. You sort the absence field in reverse chronological (descending) order---most recent date first. You group, sort, and specify first match for all columns preceding that column in order to print only the most recent absence value for each unique combination of the preceding values, such as each unique combination of employer and employee.

For each employee, the report includes only the first---most recent---absence date. Refer to the example later in this section for details.

Sample Grouped and Sorted Output

Suppose you choose City and Employee data for your report, but do not use any of the sorting and grouping options.

The output might look like this:

City	Employee
South Yarmouth	Turner
Hyannis	Adams
Centerville	Taylor
South Yarmouth	Thompson
Centerville	Smith
Hyannis	Conley
South Yarmouth	Washington
Hyannis	Benson

Then suppose you specify City as the primary sort and Employee as the secondary sort. You activate grouping for the City column. You specify a group break consisting of a line listing the total number of employee records for each city followed by one blank line.

The output is much easier to read and use:

City	Employee
Hyannis	Adams
	Benson
	Conley
Total Employees in City Hyannis: 3	
Centerville	Smith
	Taylor
Total Employees in City Centerville: 2	
South Yarmouth	Thompson
	Turner
	Washington
Total Employees in City South Yarmouth: 3	

Accessing the Define Sort and Grouping Options Screen

The following table specifies how to access the Define Sort and Grouping Options screen from the other report definition screens.

Screen	Action
Report Definition Options	Type any character in the *Sel* field next to the Set sort and grouping options entry and press Enter.
Define Selection Criteria	If using the *Create/Copy* function to create a new definition, press Enter to continue to the Define Sort and Grouping Options screen. If using the *Create/Copy* function to copy and edit a report definition or if using the *Modify* function, press F3 to return to Report Definition Options screen. Then select Set sort and grouping options as above.
Define Result Columns	If you using the *Create/Copy* function to create a new report definition and if you have come to this screen from the Define Sort and Grouping Options screen, press F9 to return to the Define Sort and Grouping Options screen. Otherwise press F3 to go to the Report Definition Options screen and select Set sort and grouping options as above.
Any other report definition screen.	Press F3 to display the Report Definition Options screen. Then select Set sort and grouping options as above.

Defining Sort, Group, and First-Match Criteria

When you perform any of the actions described above, the system displays the following screen.

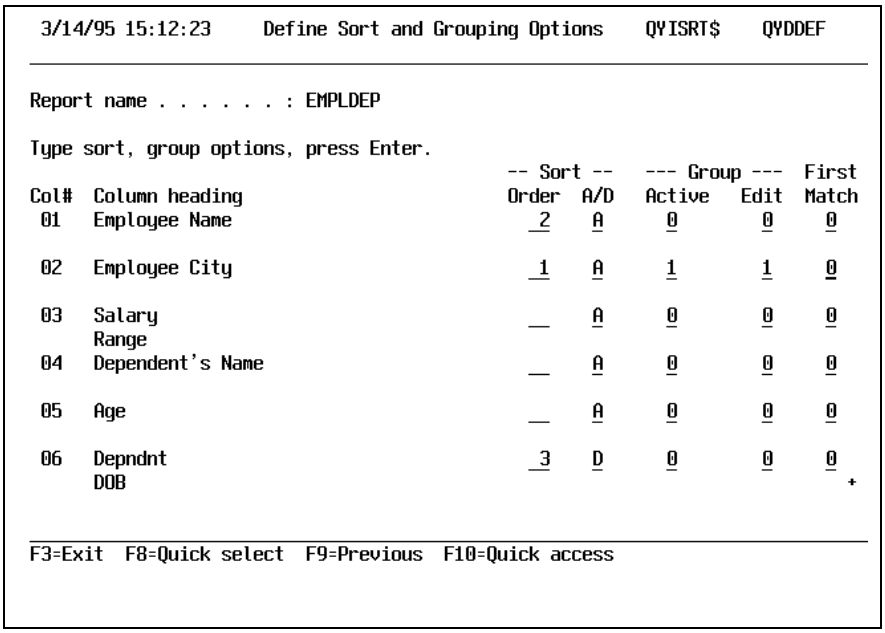


Figure 4-27: Define Sort and Grouping Options screen

Process the fields on this screen as follows to define how the report should group and sort the information, and whether or not to include only a first matching record.

Group Active

If you want to group the information by a value in a particular column, such as the City column on an employee report, find the column in the list on this screen. If you have a long list of columns, you may need to page down to find the column you want.

Then type **1** in the *Active* field for that column, under the *Group* heading.

Group Edit

If you want group-specific summary information after each group with or without breaks between groups, type **1** in the *Edit* field next to the **1** in the *Active* field.

The *Edit* field applies only when there is a **1** in the *Active* field.

If you type **1** in the *Edit* field, the system displays the Group processing options window illustrated in the following figure.

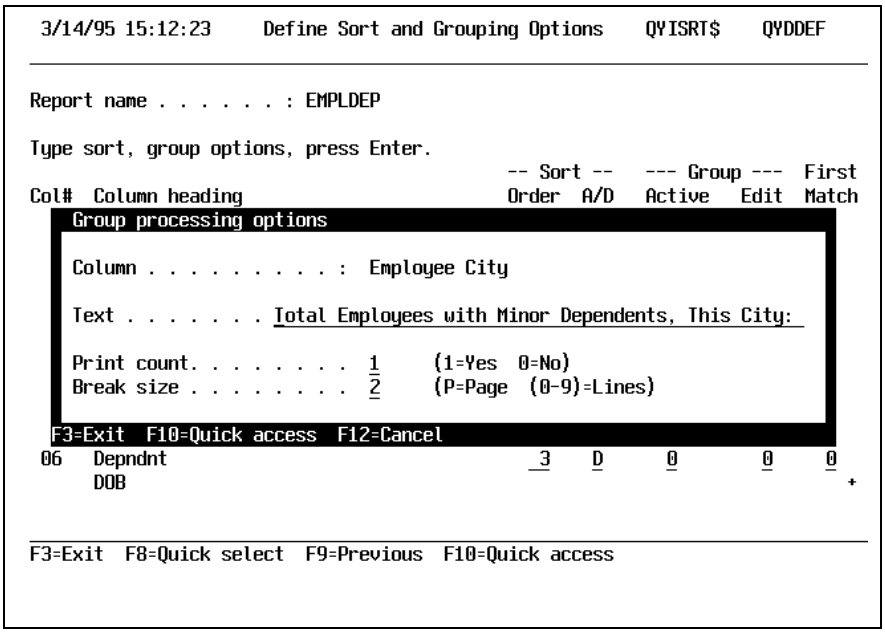


Figure 4-28: Group Processing Options window

Use the following table to complete the fields in this panel.

Field	Action
Column	The system lists the name of the report column you grouped. If this is not the column you intended, press F12 to return to the Define Sort and Grouping Options screen without using this window.
Text	If you want a summary line printed on the report at the end of each group, type text for that line here. Example: **`Total Employees with Minor Dependents, This City:`**
Print count	If you want the summary line to include the number of records printed for the group, type **`1`** in this field.
Break size	Type **`P`** for a page break between groups, **`0`** for no break between groups, or a number between **`1`** and **`9`** for that number of lines between groups. **Note:** If you type **`1`** or higher, the system inserts that number of blank lines followed by a line of dashes to separate the groups.

When done with this window, press F3 to store your group processing specifications. The system returns you to the Define Sort and Grouping Options screen. Continue to the field descriptions on the following page.

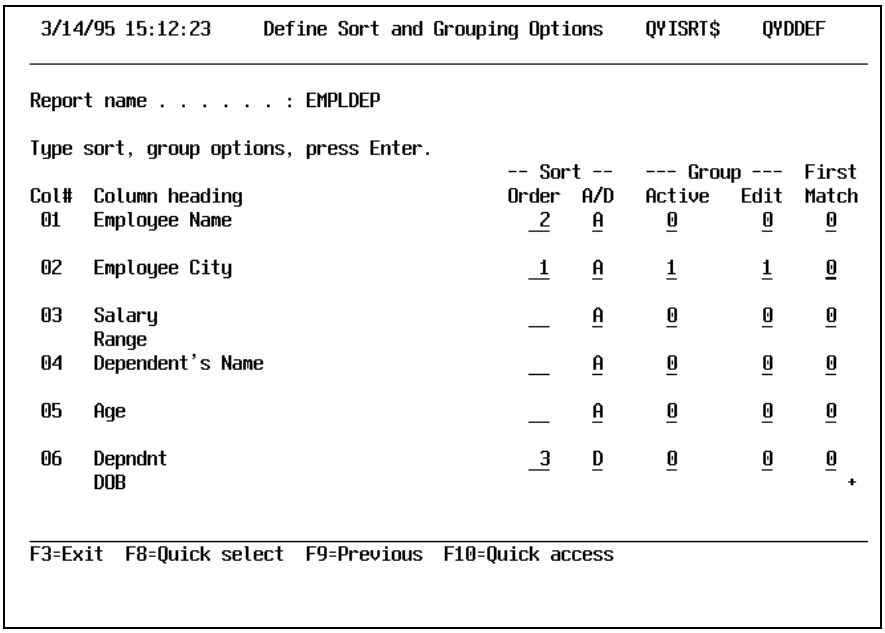


Figure 4-29: Define Sort and Grouping Options screen

Sort Order

Type **1** in the *Sort Order* field for the column you want used for the primary sort. Example: To sort an employee listing primarily by employee city, type **1** in the *Order* field for the Employee City column.

Note: If totaling for a column at the Formatting Report Columns screen, group and sort the columns in numerical order. For example, if you total Column 3, also group Columns 1 and 2. Make Column 1 the primary sort, Column 2 the secondary sort, and Column 3 the third sort.

Then type **A** for ascending or **D** for descending in the *A/D* field next to the *Sort Order* field. The following table illustrates the difference between **A** and **D**. **Note:** Use Hundred Year Format date fields if sorting.

Kind of Value	Ascending Order	Descending Order
Numbers	1, 4, 7, 10, 52	52, 10, 7, 4, 1
Text	Abby, Carol, Sam	Sam, Carol, Abby
Dates	01-14-42, 03-02-51, 06-19-75	06-19-75, 03-02-51, 01-14-42

For more information about using dates see the Working with Date Fields task earlier in Part 4 of this guide. For more information about sorting, continue to the following page.

Note: If you specified grouping for a report column, you must also specify a sort order for that column.

After specifying the primary report sorting by typing **1** in an *Order* field, you can specify how to sort entries within that primary order. Type **2** in the *Order* field for the secondary sort.

Example: You sorted an employee listing by city. You can specify listing employees alphabetically within each city by typing **2** in the *Order* field for the report's Employee column.

First Match

The *First Match* field for a report column lets you specify that you want to print only the first record that contains a unique combination of the values in each column preceding this column. For example, suppose your report has three columns:

Employer
Employee
Last Absence

You can specify printing only the most recent date on which each employee was absent. This means just one entry for each unique combination of employer and employee.

Perform the following steps to limit the output to the first match:

1. Group all columns before the target (such as the Employer and Employee columns before the Last Absence column).
2. Sort all the columns before and including the first match target (such as sorting the Employer, Employee, and Last Absence columns).

   Ensure that the target column is sorted appropriately. Example: If you want the most recent absence date, sort in decending order so that the first match is the most recent date. If you sort in ascending order, the first absence date match for each unique combination of employer and employee is the earliest absence date on record for that employee.
3. Type **1** in the *First Match* field for every column preceding the target. Do not type **1** in the *First Match* field for the target itself. For example, type **1** in the *First Match* field for the Employer and Employee columns, but not for the Last Absence column.

Refer to the following page for an illustration.

The following figure illustrates the First Match example above.

```
 8/21/95 14:27:09     Define Sort and Grouping Options    QYISRT$    QYDDEF

Report name . . . . . : LASTOUT

Type sort, group options, press Enter.
                                                -- Sort --   --- Group ---  First
Col#  Column heading                            Order  A/D   Active   Edit  Match
 01   Co                                          1     A      1        0     1

 02   Name                                        2     A      1        0     1

 03   Last                                        3     D      0        0     0
      Absent
 04   EMPLOYEE NUMBER - not printing              __    A      0        0     0

 05   EMPLOYER NUMBER - not printing              __    A      0        0     0

 06   EMPLOYEE NUMBER - not printing              __    A      0        0     0


F3=Exit  F8=Quick select  F9=Previous  F10=Quick access
```

Figure 4-30: Define Sort and Grouping Options screen showing first match

Note the following points at this screen:

- The Last Absent column contains values from the Absence Date field ATDATH, which is the Hundred Year Format version of this field. Always use a Hundred Year Format version of a date for sorting, selection tests, and calculations.
- The Last Absent date is being sorted in descending order so that the first match is the most recent date.
- Each column prior to the Last Absent column is both grouped and sorted and the sorts are in the same order as the column numbers.
- Each column prior to the Last Absent column has 1 in the *First Match* field. The Last Absent column has **0** in the *First Match* field. This means the system retrieves the first absence date for each unique combination of the values in Columns 1 and 2.
- Columns 4 through 6 in this example are used only for joining the Employee Root Master File with the Absences File.

Exiting the Define Sort and Grouping Options Screen

When done with the Define Sort and Grouping Options screen, perform one of the following actions.

Goal	Action
To continue the standard report definition sequence	If using the *Create/Copy* function to create a new report definition, press Enter to continue to the Define Result Columns screen. Go to the next task in this part of the guide.
To return to the previous screen	Press F9 to return to the previous screen. If using the *Create/Copy* function to create a new report definition, return to the Defining Selection Criteria task earlier in this part of the guide. If using the *Create/Copy* function to copy and edit a report definition or using the *Modify* function, go to the Using the Report Definitions Option Screen task later in Part 4 of this guide.
To go to the Report Definition Options screen	Press F3. Go to the Using the Report Definitions Option Screen task later in Part 4 of this guide.
To cancel this report definition process	Press F3 to return to the Report Definition Options screen. Press F3 again to display the Exit Options window. Type **2** and press Enter to exit without saving your edits.

Defining Result Columns

Understanding the Types of Result Columns

Infinium QY provides two result-column screens that let you define the following types of result columns.

Screen	Use or Uses
Define Result Columns	For creating an additional report column that has values calculated from values in a preceding report column Example: A new column headed If 2% Raise and defined as the value in a Base Pay column multiplied by 1.02
Define Result Strings	For two uses: • Creating an additional report column that contains just a portion of the values in a preceding report column Example: A new Department column containing a specific part of a Infinium General Ledger account number • Creating an additional report column that strings together (concatenates) values from preceding columns Example: A new column containing the City + State + Zip code line of a mailing label

The following pages explain how to access and use these two screens.

Accessing the Define Result Columns Screen

The following table specifies how to access the Define Result Columns screen from other report definition screens.

Note: If the report definition has only alphanumeric columns, the system displays the Define Result Strings screen rather than the Define Result Columns screen when you perform the following actions.

Refer to the Accessing the Define Result Strings Screen subsection later in this section for related details.

Screen	Action
Report Definition Options	Type any character in the *Sel* field next to the Define Result Columns entry and press Enter.
Select Fields or Format Report Columns	Press F2. When you press F3 at the Define Result Columns screen, the system returns you to the Select Fields or Format Report Columns screen.
Define Sort and Grouping Options	If using the *Create/Copy* function to create a new definition, press Enter to continue to the Define Result Columns screen (or, if using only alphanumeric columns, the Define Result Strings screen). If using the *Create/Copy* function to copy and edit a report definition or if using the *Modify* function, press F3 to return to Report Definition Options screen. Then select Define Result Columns as above.
Define Result Strings	If you pressed F7 at the Define Result Columns screen to display the Define Result Strings screen as described later in Part 4 of this guide, press F3 to return to the Define Result Columns screen.
Any other report definition screen	Press F3 to display the Report Definition Options screen. Then select Set sort and grouping options as above.

Defining a Calculated Result Column

When you perform one of the actions summarized on the preceding page and the definition includes any numeric fields, the system displays the Define Result Columns screen.

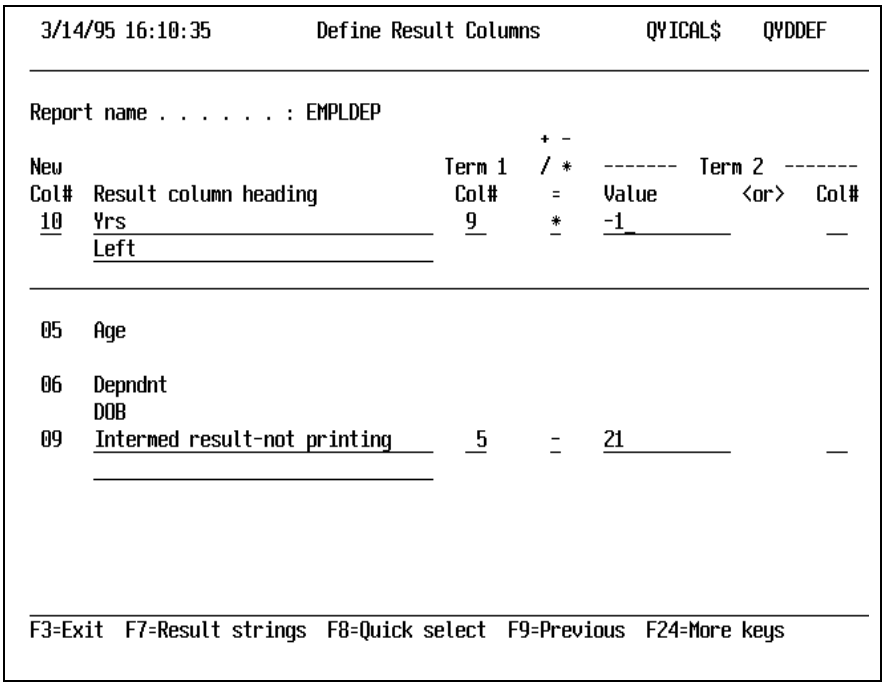


Figure 4-31: Define Result Columns screen

Perform the following steps to define a new column, to specify the new column's heading, and to define any mathematical calculations required to derive the values for the new column. The preceding illustration shows calculations for new columns 9 and 10 as explained in the running example used for the following instructions.

1. Type the column number for the new column directly under the *New Col#* heading.
2. Type a heading for the new column directly under the *Result column heading* heading.
3. Under *Term 1 Col#*, type the number of the column to be used as the base amount for the calculation.

   Example: To determine how many more years a dependent will be under 21 years of age, specify the Dependent's Age column number as Term 1. This value is the starting amount for the calculation.
4. Under + - / * type one of these listed mathematical operators to tell the system to add, subtract, divide, or multiply. You complete the instruction by adding Term 2 to the equation in the next step.
5. For Term 2, either type a fixed value under *Value* or type the number of another column under *Col#*. If you identify another column under *Col#,* the system uses the values in that column to complete the calculation.

Example: Type **21** under *Value* to subtract 21 from the dependent's age.

6. Press Enter to add the new column to the list of fields displayed on the bottom half of the screen.

   You can then press F11 to display an updated list of the columns.

Caution: If adding multiple result columns involving calculations, number the new result columns in the order in which the system is to perform the calculations. The system follows the column order.

Additional Result Column Calculation Examples

The following pages provide additional examples of report calculations. These examples are followed by information about using result strings, which manipulate alphabetic values rather than mathematical values.

Calculating an Employee's Current Age

Perform the following steps to calculate an employee's current age:

1. Include the employee's birthdate in a report column, using a HYF (Hundred Year Format) version of the birthdate from the Employee Root Master File.

   For this example, imagine you define the birthdate as Column 9.

2. At the Define Result Columns screen, create a new derived Column, Column 10, that contains the result of the following calculation:

   Term 1 = **9** (the birthdate column)
   Operator = **-** (the minus sign)
   Term 2 = **TODAY** in the *Value* field

   This gives you the number of days since the employee was born. But the number is a negative number since there are more days now since 1/1/1900 than there were when the employee was born.

3. To convert the negative number to a positive number, create a second new result column as Column 11. Define Column 11 to contain the result of the following calculation:

   Term 1 = **10** (the age in days and as a negative number)
   Operator = ***** (the multiplication sign)
   Term 2 = **-1** (minus one, in the *Value* field)

   This reverses the minus sign because a negative number times a negative number equals a positive number.

4. To convert the days to years, create a third result column as Column 12, specifying the heading **Age** and defining the contents as the result of the following calculation:

   Term 1 = **11** (the age in days and as a positive number)
   Operator = **** (the division sign)
   Term 2 = **365.25** in the *Value* field

Calculating Length of Service at Retirement

Perform the following steps to calculate an employee's length of service upon retirement, presuming the employee stays with your company:

1. Select *hire date* and *retirement date* fields in HYF (Hundred Year Format) as columns for your report. Assume for this example that hire date is Column 6 and retirement date is Column 7.
2. At the Define Result Columns screen, create a new result column as Column 8, containing the result of the following calculation:

   Term 1 = **7** (the retirement date)
   Operator = **-** (the minus sign)
   Term 2 = **6** (the hire date) under Col#

3. Print Column 8 on your report headed **Retirement Age**.

About Calculations Involving the Year 2000

Our Western (so-called Gregorian) calendar ordinarily adds an extra day every four years because the earth takes a little more than 365 days to go around our sun. Since the earth takes a little less than 365.25 days to go around our sun, special adjustments apply once a century.

The following paragraph summarizes those rules for reference in case the issue arises at your site.

Note: The last year in a century ends 00, being the hundredth year in that century. The first year of the next century ends 01, as in 2001. This is because the first year of the first century was year 1. There is no year 0.

Calendar year 2000 follows special leap year rules as follows:

- Ordinarily, each year evenly divisible by 4 is a leap year.
- Exception: The last year in a century (that is, a year ending 00) is ordinarily not a leap year even though it is evenly divisible by 4.
- Exception to the previous exception: The correction does not apply when the last year of the century is evenly divisible by 400. That is, the years 400, 800, 1200, 1600, 2000 and so forth are leap years.

The result is that the year 2000 does have 366 days (is a leap year).

Accessing the Define Result Strings Screen

The Define Result Columns screen is for use only with mathematical calculations. Infinium QY distinguishes between reports that include numeric columns, for which you can perform calculations, and reports that have only alphanumeric (character-based) columns.

Infinium QY automatically displays the Define Result Strings screen rather than the Define Result Columns screen when the report definition has only alphanumeric fields and you do one of the following:

- Press Enter at the Define Sort and Grouping Options screen during the standard *Create/Copy* sequence
- Select Define Result Columns at the Report Definition Options screen

Perform the following steps to work with character strings. Omit step 1 if the system has already displayed the Define Result Strings screen.

1. If you have both numeric fields and alphanumeric fields in the definition, press F7 at the Define Result Columns screen to display the Result Strings screen.

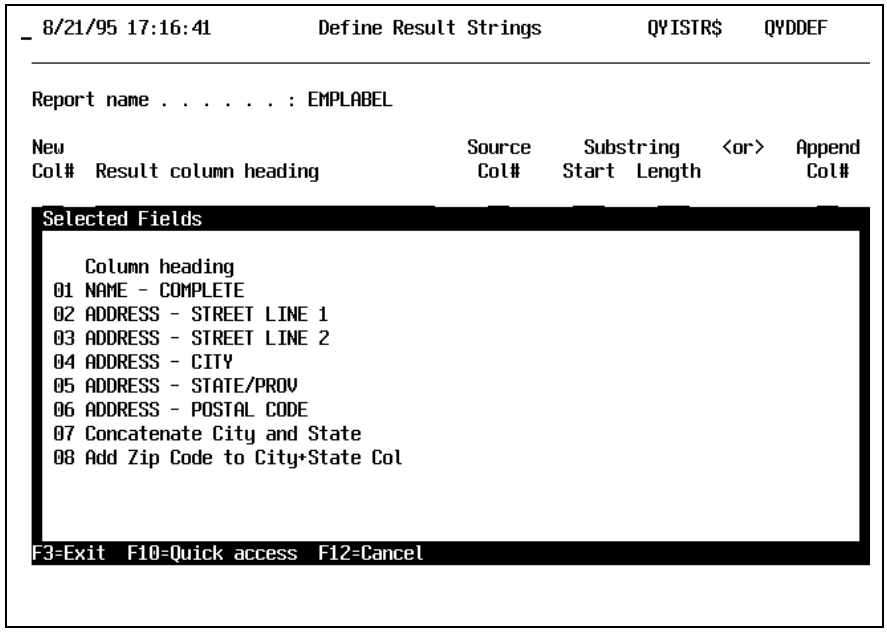


Figure 4-32: Define Result Strings screen

2. Choose an action at the Define Result Strings screen.

Task	Action
Derive a portion of an existing value	Complete the fields in the top section of the screen as follows: • Under *New Col#*, type the number of the new result column. Under *Result column heading*, type the heading for the new column. • Under *Source Col#*, type the number of the column from which you want to derive a substring of values, such as positions 5-7 of an account number. • Under *Substring Start*, type the position of the first character needed, such as **5**. • Under *Substring Length*, type the number of character positions you want in the substring, such as **3** (meaning to include positions 5, 6, and 7). When you generate the report, the system places a substring of the source column into this new column, beginning at position 5 and taking three characters (characters 5, 6, and 7).
Concatenate (string together) values from different fields	Complete the fields in the top section of the screen as follows: • Under *New Col#*, type the number of the new result column. • Under *Result column heading*, type the heading for the new column. • Under *Source Col#*, type the first of the fields to be concatenated. Example: If you are creating mailing labels, type the number of the City column. • Under *Append Col#*, type the number of the column to be appended to the Source Column. Example: For mailing labels, type the number of the State column to append this value to the City column.

3. Press Enter to move the definition of the new column down to the bottom portion of the screen.

   Repeat the preceding steps to append additional values. Example: For mailing labels, create another new result column to append the Zip code column to the City + State column.

   Note: Refer to the sample screens for mailing labels later in this section.

4. Press F3 to return to the Define Result Columns screen, if applicable, or to return to the Report Definition Options screen.

Using Result Strings to Create Mailing Labels

As indicated in the preceding section, you can create a result string column that contains the values from city, state, and Zip code columns within a single column. When you specify label format during batch generation of a report, the system treats each column as a single label line.

Perform the following steps to create the city, state, and Zip code line for a mailing label report:

1. At the Select Fields screen, select from the Employee Root Master File the fields needed for building the mailing label. The following figure shows the list displayed when you press F11 to review your selections:

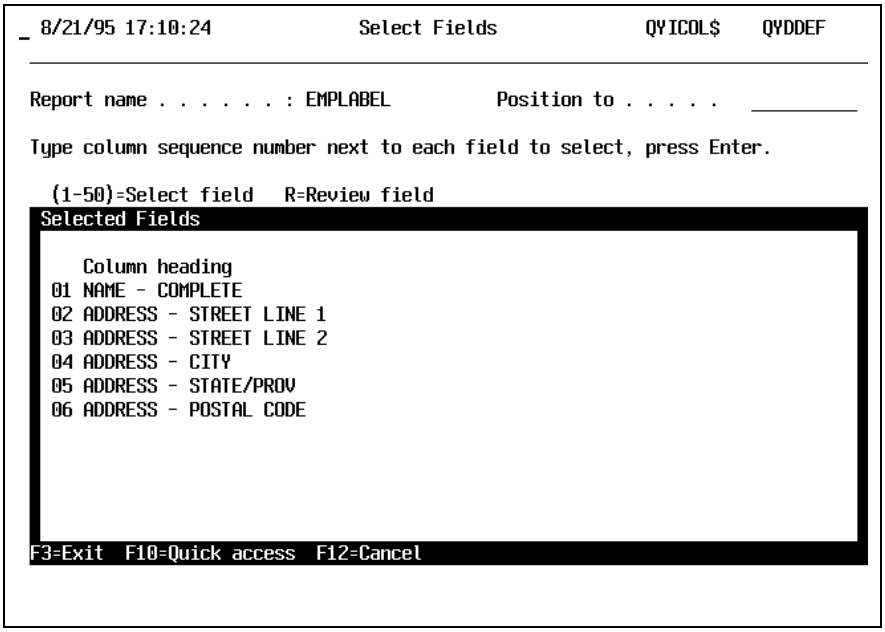


Figure 4-33: Sample screen showing Selected Fields window

2. Since this definition has no numeric fields, the system automatically displays the Define Result Strings screen when you press Enter at the Define Sort and Grouping Options screen during the standard Create/Copy sequence or select Define Result Columns at the Report Definition Options screen.

   Note: You can also access the Define Result Strings screen by pressing F2 at the Select Fields or Format Report Columns screen.

   Follow the model in the screen at the top of the following page to create result Column 7 concatenating the City and State values.

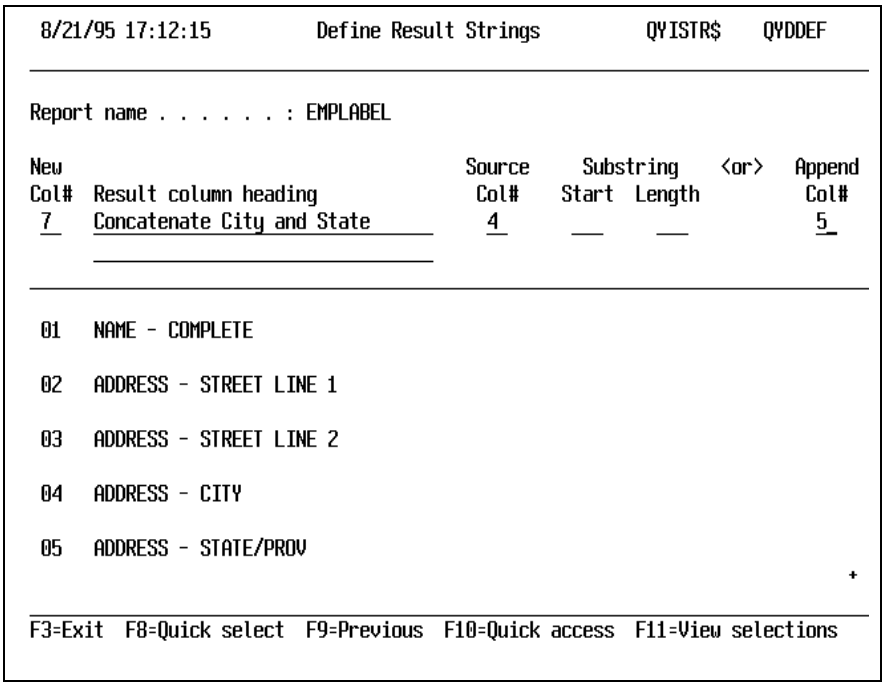


Figure 4-34: Define Result String screen adding the City plus State column

3. Press Enter to move the data for Column 7 to the list of columns in the lower portion of this screen.
4. Follow the model in the next screen illustration to define Column 8 concatenating Column 7 values with the original Zip code column.

```
 8/21/95 17:15:06          Define Result Strings          QYISTR$    QYDDEF

Report name . . . . . . : EMPLABEL

New                                          Source     Substring    <or>   Append
Col#  Result column heading                   Col#    Start  Length          Col#
 8    Add Zip Code to City+State Col           7       ___    ___            6_

 06   ADDRESS - POSTAL CODE

 07   Concatenate City and State               4       ___    ___            5

F3=Exit  F8=Quick select  F9=Previous  F10=Quick access  F11=View selections
```

Figure 4-35: Define Result Strings screen adding the City, State, Zip column

5. Press Enter to move the data for Column 8 to the list of columns on the bottom part of the screen.
6. You can press F11 to view your new list of columns.

```
_ 8/21/95 17:16:41          Define Result Strings          QYISTR$    QYDDEF

Report name . . . . . . : EMPLABEL

New                                          Source     Substring    <or>   Append
Col#  Result column heading                   Col#    Start  Length          Col#

 Selected Fields

    Column heading
 01 NAME - COMPLETE
 02 ADDRESS - STREET LINE 1
 03 ADDRESS - STREET LINE 2
 04 ADDRESS - CITY
 05 ADDRESS - STATE/PROV
 06 ADDRESS - POSTAL CODE
 07 Concatenate City and State
 08 Add Zip Code to City+State Col

F3=Exit  F10=Quick access  F12=Cancel
```

Figure 4-36: Selected Fields panel

7. If you displayed the Selected Fields panel, press F12 to return to the Define Result Strings screen.

8. Press F3 to return to the Format Report Columns screen either directly (if you pressed F2 at the Format Report Columns screen to access the Define Result Strings screen) or indirectly (by returning to the Report Definition Options screen and selecting Format Report Columns).

9. At the Format Report Columns screen, mark the following columns as not to be printed, since Column 8 contains the values from these source columns:

   Column 4 - City
   Column 5 - State
   Column 6 - Zip code
   Column 7 - City + State

10. Complete the report definition screen sequence as usual. Then at the Report Definition Options screen press F3 to display the Exit Options window, type **1**, and press Enter to exit and save the new report definition.

11. To generate the labels, select *Report Generation* at the Infinium QY main menu and select *Batch Run* at the Report Generation menu. The system displays the Batch Run screen.

12. At the Batch Run screen, type the name of the report definition for the labels and type **4** to request label format as illustrated in the following screen.

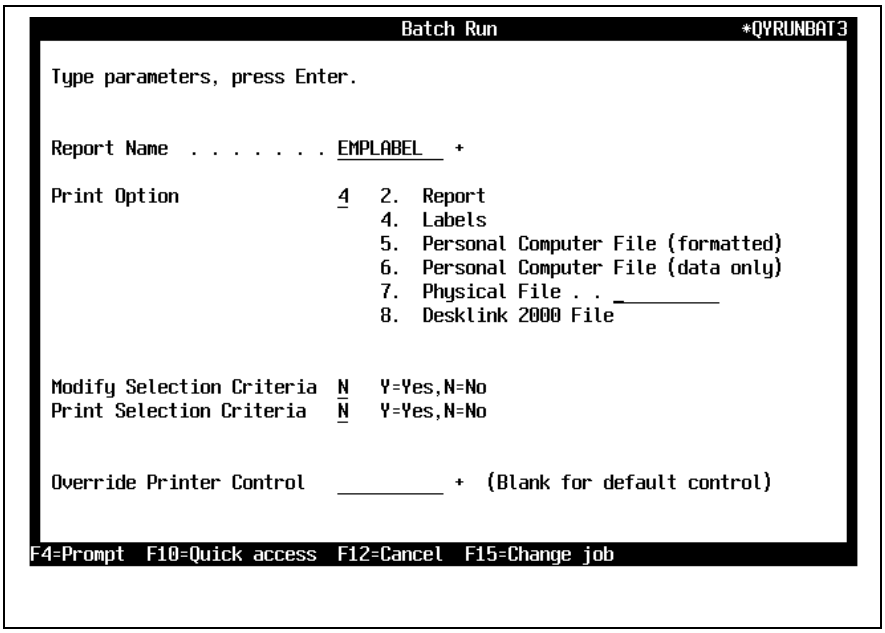


Figure 4-37: Batch Run screen with settings for generating labels

The system generates the report in label format as follows:

- Identifies the first six columns that are marked to be printed. If there are fewer than six columns to be printed, the system selects all the printable columns.

  Note: Most mailing labels have only three or four lines (meaning three or four columns to be printed on separate lines). You can use the option of up to six lines for creating labels with five or six lines of data for other uses such as file-folder tab information.

- Following the specifications in printer control QYTLABEL, vertically stacks these columns to create the following format:

  Susie Q. Employee
  Apartment 4-12
  123 Residential St.
  Hyannis MA 02601

- Uses additional information in printer control QYTLABEL to determine how many characters wide the label is to be and how many blank lines to print after the last address line before beginning the next label. The system prints the labels in a single column at the printer designated in the printer control.

Modifying Result Column Characteristics

Infinium QY limits the result column characteristics that you edit at the Define Result Columns screen and requires you to use the Format Report Options screen for some characteristics.

Screen	Task
Define Result Columns	Modify a calculation's definition
Define Result Strings	Modify the definition of a substring or concatenation column
Format Report Columns	Any of the following: • Edit a result column's heading • Determine column placement in the output by modifying the column numbers and editing the format fields such as starting position and length • Delete a result column from the report by typing blank spaces over the column number for the column that is to be deleted • Specify totaling, averaging, finding the minimum of, or finding the maximum of the new column's values

Exiting the Define Result Columns Screen

When done defining result columns and strings, perform one of the following actions.

Goal	Action
To continue the standard report definition sequence	If using the *Create/Copy* function to create a new report definition, press Enter or F3 to continue to the Report Definition Options screen. Go to the next task in this part of the guide.
To return to the Select Fields or Format Report Columns screen	If you pressed F2 at either the Select Fields or Format Report Columns screen to display the result column screens, press F3 to return to the Select Fields or Format Report Columns screen.

Goal	Action
To return to the previous screen	Press F9 to return to the previous screen. Depending on your path to the Define Result Columns screen, the system displays the Select Fields, Format Report Columns, Define Sort and Grouping Options screen, or Report Definition Options screen.
To go to the Report Definition Options screen	Press F3. Go to the Using the Report Definitions Option Screen section later in Part 4 of this guide.
To cancel this report definition process	Press F3 to return to the Report Definition Options screen. Press F3 again to display the Exit Options window. Type **2** and press Enter to exit without saving your work on this definition.

Using the Report Definition Options Screen

Accessing the Report Definition Options Screen

The following table explains how to access the Report Definition Options screen:

Screen	Action
Any other report definition screen	Press F3 to exit the current *Create/Copy* sequence of screens or the current *Modify* function screen.
The *Report Maintenance* menu	Select *Modify*. Then type the name of the report definition you want to modify and press Enter.

When you perform one of the preceding actions, the system displays the Report Definition Options screen illustrated on the following page.

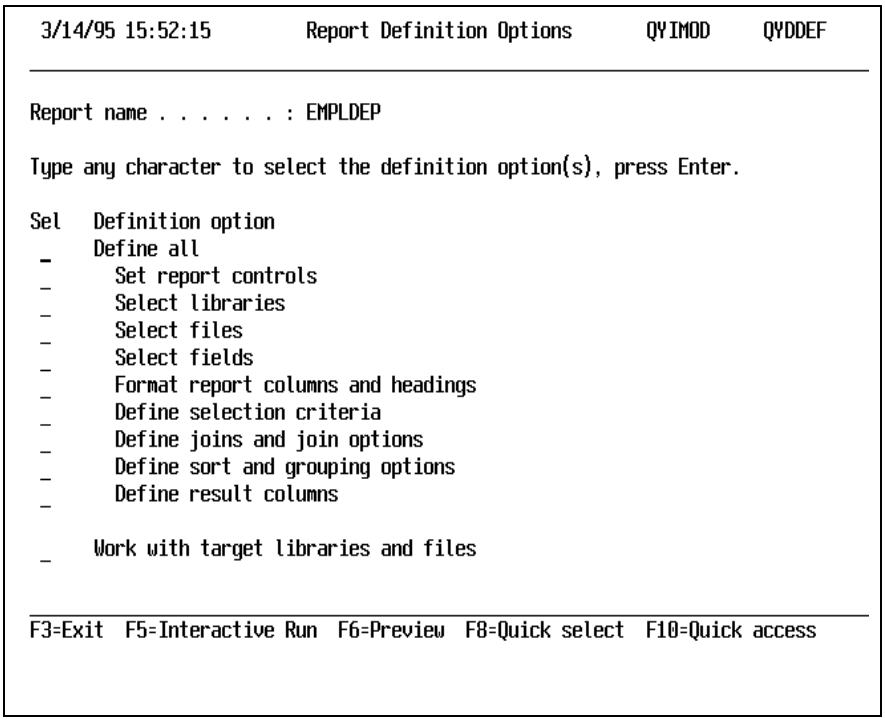


Figure 4-38: Report Definition Options screen

The Report Definition Options screen lets you do any of the following:

- Directly access any of the standard report definition screens to review or modify the specifications at that screen, or a specified set of those screens omitting the ones you do not need
- Change all report definition references from one library or file to another library or file in order to switch the definition, for example, from a test environment library to a production library environment
- Run the report interactively to test the definition on a limited number of database records and display the output with sample data
- Preview the report's format without sample data
- Access the Quick Select panel to add a column by specifying a library, file, and field name without having to process the Select Library, Select File, and Select Field screens
- Display the QuickAccess panel that lets you move directly to any Infinium product function by entering that function's QuickAccess code

The following subsections provide details about using this screen:

- Modifying the Report Definition

- Other Actions Available at the Report Definition Options Screen
- Exiting the Report Definition Options screen

Modifying the Report Definition

The following table identifies report-modification actions available at the Report Definition Options screen. Type any character in the *Sel* field next to the applicable option or options and press Enter to display the screen or screens for the action or actions you selected.

Note: If you select more than one option at the Report Definition Options screen, the system displays the applicable screens in the order in which they are listed on the Report Definition Options screen.

Option	Purpose
Define all	To repeat the entire report definition screen sequence, editing the data where necessary
Set report controls	To perform such actions as editing the report definition title or report security, reviewing line spacing, specifying summary or detailed output, changing the default printer control, and editing the interactive record limit
Select libraries	To select a new library or delete a current library from the definition
Select files	To select new files or to delete current files from the definition
Select fields	To select new fields or delete current fields from the definition
Format report columns and headings	To change the structure and format of the report
Define selection criteria	To modify criteria for selecting records to be used for gathering data to be included in the report output
Define joins and join options	To edit file-join information
Define sort and grouping options	To modify how data is grouped and sorted in the report output, or which first match limits to use
Define Results columns	To add a new column for results of a mathematical calculation, or to access the Define Results Strings screen and add a column containing concatenated (strung together) values from other fields. Example: To concatenate City + State + Zip code values for the last line of mailing labels.

Other Actions Available at the Report Definition Options Screen

Working with target libraries and files

Select *Work with target libraries and files* to display the Work with Target Names screen and change the name of a library or file included in this definition. This option lets you easily adapt the same report definition for use with different versions of your database application, such as a test version and a production version. You do not have to reselect all the files and fields within the library, or all the fields within the file, when you change the library or file name.

Refer to the Changing Target Libraries and Files section later in Part 4 of this guide for detailed information and procedural instructions.

Pressing F5 for an Interactive Run

Press F5 at the Report Definition Options screen to run the report interactively and display the output on your terminal. The system limits the number of report output records to the number specified within this definition in the *Interactive limit field* on the Set Report Controls screen.

Refer to the Running a Report Interactively section in Part 5 of this guide for more information and illustrations of sample online output.

Pressing F6 to Preview the Format

Press F6 to preview the format of the report output without any data. The effect is exactly the same as the effect of pressing F6 at the Format Report Columns screen.

You can press F19 to shift the display to the left. You can press F20 to shift the display to the right.

Refer to the Format Report Columns section earlier in Part 4 of this guide for more information.

Pressing F8 for the Quick Select Window

Press F8 to display the Quick Select window. At this window, type new Library, File, and Field names to define additional columns for the report without processing the Select screens for each of these selections.

Refer to the Using the Quick Select Window subsection of the Setting the Report Controls section earlier in Part 4 of this guide for details and an illustration of the Quick Select window.

Pressing F10 for the Quick Access Code Window

Press F10 to display the Quick Access Code window. This window lets you type the QuickAccess code for any Infinium application function

you are authorized to execute. You can press F10 to perform the following steps at any screen in Infinium QY.

Perform the following steps to execute a function from this window:

1. Press F10. The system displays the Quick Accesss Code window.

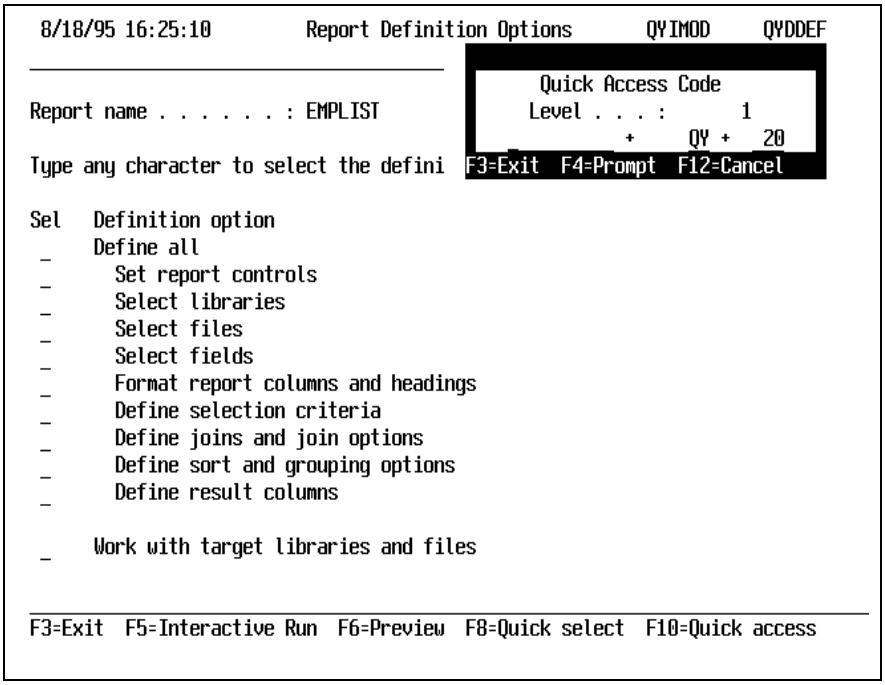


Figure 4-39: Quick Access Code window

2. Type the system designator (such as **HR** or **GL**) and version number (such as **000**, the system production version) of the system whose function you want to execute. The default is the system you are on.
3. In the field on the left in this window, type the QuickAccess code for the function you want to execute. If you do not know the code for the function you want to execute, press F4 to display a list of the codes for functions you are authorized to run and select a code.
4. Press Enter. The system executes the function that you specified as if you had selected it from the application's menu.
5. When you exit the function, the system returns you to the screen at which you press F10 to display the Quick Access Code window.

Exiting the Report Definition Options Screen

Perform the following steps to exit the Report Definition Options screen:

> **Caution:** The system does not save your changes until you perform both of the following steps.

1. At the Report Definition Options screen, press F3 to exit.
2. At the Exit Options panel, do one of the following:

   Type **1** and press Enter to save your work.

   Type **2** and press Enter to exit without saving your work.

   Type **3** and press Enter to cancel the exit process and return to the Report Definition Options screen.

   If you type **1** or **2**, the system returns you to the Infinium QY *Report Definition* or *Report Maintenance* menu.

Using the Report Maintenance Directory

About the *Report Maintenance* Directory

About Choosing Directory Contents

The *Report Maintenance* menu's *Directory* function lets you customize directory selection criteria to list only the group of report definitions with which you want to work. For example, you can request a directory of report definitions whose names begin with the letters **WKLY** to order to display a list of your weekly-report definitions.

Refer to the Selecting the Directory's Contents subsection later in this section for details.

About Actions Available at the Directory

The *Report Maintenance* directory gives you a wide range of choices, providing an efficient starting point for many actions to save you keystrokes.

For example, the screen that displays the directory lets you directly perform the following tasks directly from the directory screen:

- Access the routine and screens for creating a new report definition
- Generate a Report Details report for a listed definition
- Delete a listed definition
- Generate a report from a listed definition in batch or interactively

The following pages provide details about performing these tasks.

Accessing the Report Maintenance Directory

The Display Report Directory screen in the Infinium QY Report Maintenance Directory lets you specify selection criteria to limit the contents of a directory to a specific group of report definitions.

Perform the following steps to access the Display Report Directory screen:

1. At the Infinium QY main menu, select *Report Maintenance*.
2. At the *Report Maintenance* menu, select *Directory*.

   The system displays the Display Report Directory screen.

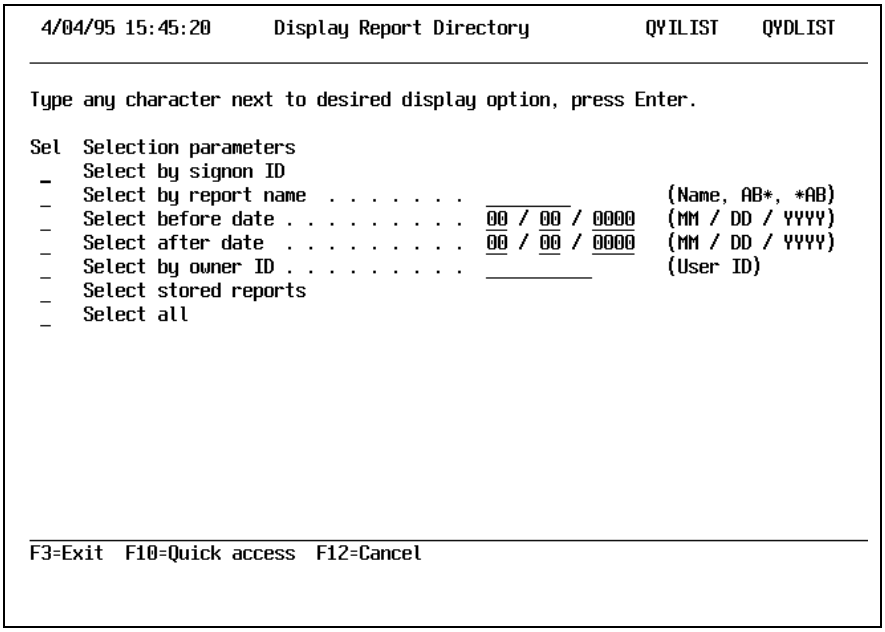


Figure 4-40: Display Report Directory screen

Perform the following procedure to generate a customized directory of report definitions at this screen.

Selecting the Directory Contents

Type any character next to one of the options at the Display Report Directory screen and then follow the instructions listed in the table.

Selection	Action
Select by signon ID	No further action is required to include only report definitions associated with the ID under which you logged on to Infinium QY.

Selection	Action
Select by report name	Type the name of the report definition in the field after the selection. **Note:** You can type the whole name, or you can use an asterisk wildcard (*) to include a group of reports sharing a similar name. For example, type **EMPL*** to include only report definitions with names that begin EMPL, such as **EMPLLIST** and **EMPLDEP**, or type ***DEP** to include only your employee dependents reports ending in **DEP**.
Select before date	In the 00/00/0000 field after the selection, type a date to include only report definitions last modified before that date. Use format MM/DD/YYYY, such as **01/01/1995**.
Select after date	In the 00/00/0000 field after the selection, type a date to include only report definitions last modified after that date. Use format MM/DD/YYYY, such as **01/01/1995**.
Select by owner ID	Type the owner's ID in the field after the selection to include only report definitions owned by that user. The ID can be an individual user's ID, a group ID, or a system ID such as **QY2000**.
Select all	No further action is required to select all report definitions currently on your system that you are authorized to access.

Then press Enter. The system generates the requested directory and displays that directory on the Report Directory screen. The list includes only reports you are authorized to modify or generate.

Note: The *Select stored reports* criterion does not apply when you are working with report definitions. For information about using the Select stored reports criterion, refer to the Displaying, Printing, and Deleting Stored Reports section in Part 5 of this guide.

The following pages provide instructions for using the directory.

Using the Displayed Report Definition Directory

The system displays the Report Directory screen when you specify directory contents at the Display Report Directory screen and press Enter as described on the preceding page.

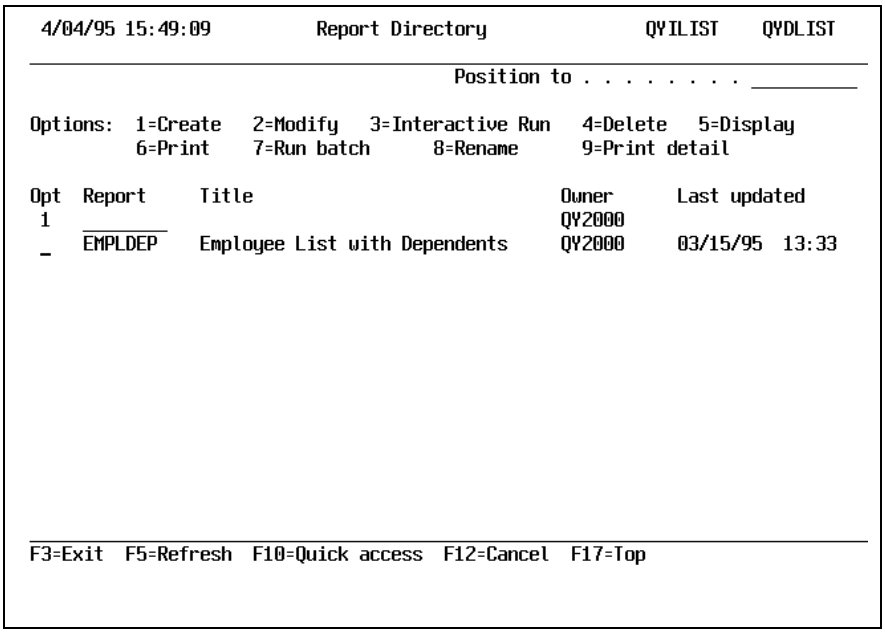


Figure 4-41: Report Directory screen

The following table summarizes the actions available to you at the Report Directory screen.

Task	Action
Create a New Report Definition	The system displays **1** in the *Opt* field on the directory's first line. Type a new report name in the *Report* column and press Enter. Alternatively, copy an existing definition by typing **1** next to that definition and pressing Enter. Then follow the standard procedure for creating or copying a new report definition. When you press F3 at the Report Definition Options screen and exit saving your changes, the system returns you to the Report Directory screen.
Modify a Listed Report Definition	Type **2** in the *Opt* field next to the applicable definition name and press Enter. At the Report Definition Options screen, follow the modify report definition procedure in Part 4 of this guide. When you press F3 at the Report Definition Options screen and exit saving your changes, the system returns you to the Report Directory screen.
Interactively Run a Listed Report Definition	Type **3** in the *Opt* field next to the applicable definition name and press Enter. The system displays the Display Report Output screen. You can page through the report and you can press > and / to shift the display horizontally (from side to side). When you press F3 or F12, the system returns you to the Report Directory screen.

Task	Action
Delete a Listed Report Definition	Type **4** in the *Opt* field next to the applicable definition name and press Enter. When prompted, confirm the deletion request. Note: When you delete a report definition, Infinium QY also automatically deletes all stored report outputs generated from that definition.
Run a Definition in Batch Mode	Type **7** in the *Opt* field next to the applicable definition name and press Enter. The system displays the Batch Run screen. Refer to Part 5 of this guide for details about submitting a report-generation job at the Batch Run screen. When you press Enter at the Batch Run screen, the system submits the batch job and returns you to the Report Directory screen.
Rename a Report Definition.	Type **8** in the *Opt* field next to the applicable definition name and press Enter. The system displays the Rename a Report screen. Type the new name in the *New name* field and press Enter. The system returns you to the Display Report Directory screen. Press F5 to refresh the displayed directory, which lists the report definition by its new name.
Print a Report Detail Report	Type **9** in the *Opt* field next to the applicable definition name and press Enter. The system generates and prints detailed information about the selected report definition in a Report Details Report and remains at the Report Directory screen. Refer to Part 5 of this guide for more information about the Report Details Report.
Exit from the Directory	Press F3 or F12 to return to the Display Report Directory screen. Then either make a new selection to generate a new directory listing or press F3 or F12 again to return to the *Report Maintenance* menu.

Note: The 5-Display (stored output) and 6-Print (stored output) options at this screen do not apply when you are working with report definitions. Refer to the Displaying, Printing, and Deleting Stored Report Output section in Part 5 of this guide for details about these options.

Changing Target Libraries and Files

Purpose and Advantages

Purpose

The *Work with target libraries and files* option at the Report Definition Options screen lets you change a selected library or a selected file for a report definition to a related library or file. For example, if you create a sample report definition for a test or training database, you can use the *Work with target libraries and files* option to redirect the report to your live production database library and its files.

Advantages

The advantage of using this option rather than using the Select Libraries or Select Files screen is as follows.

Deleting a library from the report definition at the Select Libraries screen also deletes the related files and fields from that definition, requiring that when you select the new library you must reselect all the required files and fields.

Similarly, deleting a file from the report definition at the Select Files screen also deletes the related fields from the definition, requiring that when you select the new file you must reselect all the required fields.

Changing the library or file by using the *Work with target libraries and files* option, in contrast, changes only the library or file to which the definition points. The definition retains the specifications for the files and fields so that you do not need to reselect these files and fields.

Procedure

Perform the following steps to redirect an existing report definition to a different target library or file, such as to a test library or file.

Caution: Before performing this procedure, ensure that the library or file you are redirecting the report definition to has the same file and field or field structure as the library or file previously specified for this report. Also ensure that you know the library or file name to which you plan to redirect this report definition.

1. Use any method to display the Report Definition Options screen.

   If necessary, refer to the Using the Report Definition Options screen section earlier in this part of the guide for the available paths.

```
 3/14/95 15:52:15        Report Definition Options       QYIMOD     QYDDEF
_________________________________________________________________________

Report name . . . . . . : EMPLDEP

Type any character to select the definition option(s), press Enter.

Sel   Definition option
 _    Define all
 _      Set report controls
 _      Select libraries
 _      Select files
 _      Select fields
 _      Format report columns and headings
 _      Define selection criteria
 _      Define joins and join options
 _      Define sort and grouping options
 _      Define result columns

 _    Work with target libraries and files

_________________________________________________________________________
F3=Exit  F5=Interactive Run  F6=Preview  F8=Quick select  F10=Quick access
```

Figure 4-42: Report Definition Options screen

2. Type any character in the *Sel* field next to *Work with target libraries and files*. Then press Enter.

   The system displays the Work with Target Names screen, listing the library, file, field, and column heading identifiers for each column in the report definition.

3. At the Work with Target Names screen, do one of the following:

   Type **1** in the *Opt* field next to any entry for the library to be changed. Example: To change HRDBFA073 to TRAINQYHR, type **1** next to any entry that lists HRDBFA073.

   Type **2** in the *Opt* field next to any entry for the file to be changed.

4. Press Enter.

   The system displays one of the following.

- Change Target Library window
- Change Target File window, which displays the entry's current library followed by a *To library* field, or the current library and file followed by a *To file* field.

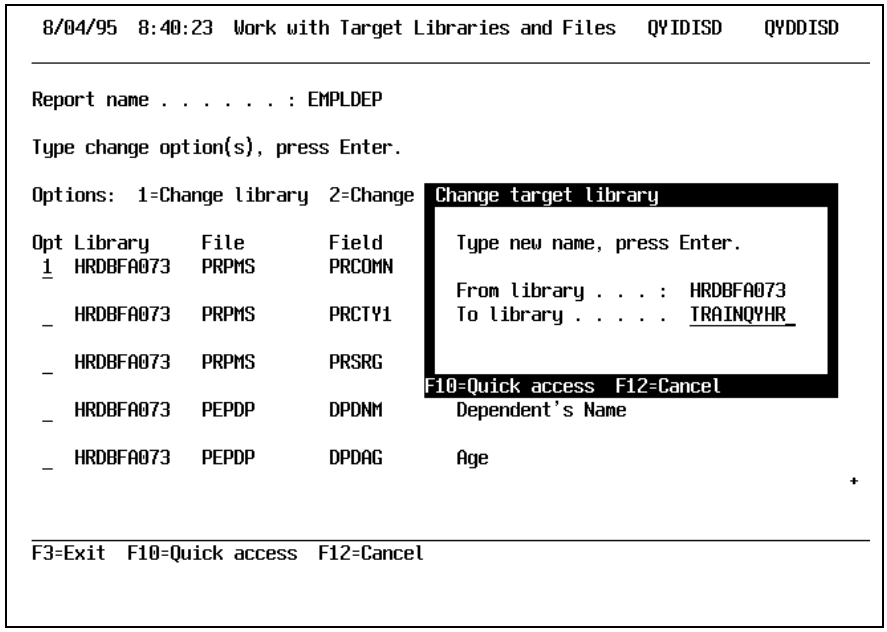


Figure 4-43: Change Target Library window

5. Type the new library or file name in the *To library* or *To file* field.

   Note: A new library must have the files selected for the report. A new file must have the fields selected for the report.

6. Press Enter. The system changes all references to the old library or file to the new library or file name throughout the report definition and displays a message identifying how many library or file references changed in the definition. Press F3 to close the window and return to the Work with Target Libraries and Files screen.

7. Press F3 to return to the Report Definition Options screen.

Renaming a Report

Purpose

The *Rename* function lets you assign a new name to a report definition.

Renaming a report definition can become appropriate for many reasons, including the following examples:

- If the report definition name indicates who is responsible for the report, and that responsibility changes to another person
- If the report definition includes an indication of run frequency such as WKLY, and you change the frequency

Renaming a report definition does not affect the following:

- The contents of the report definition
- The security restrictions that apply to the report definition

Caution: When you rename a report, any copies of the report output that you stored under the old name are included in lists of output but you cannot display or print their contents. If you have stored outputs for a report that you still need, do not rename the old report. Instead, use the *Create/Copy* function to copy the old report and assign the new name to the copy.

Procedure

Perform the following steps to change a report definition's name:

1. At the Infinium QY main menu, select *Report Maintenance*.
2. At the *Report Maintenance* menu, select *Rename*.

   The system displays the Rename a Report screen.

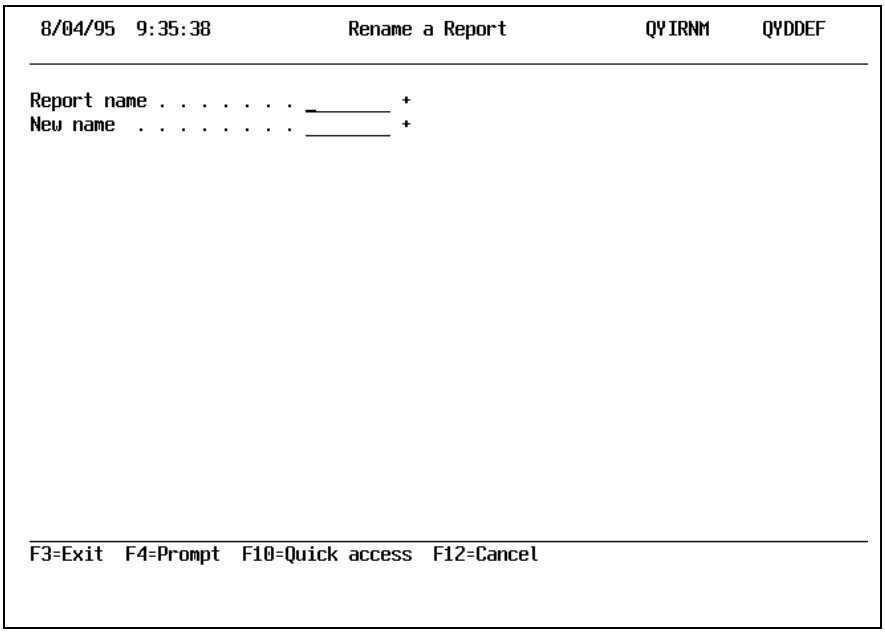


Figure 4-44: Rename a Report screen

3. In the *Report name* field, type the current name of the report definition that is to be renamed.

   Note: If you do not recall the exact name, press F4 to display a list of current report definition names. Type any character in the column next to the name of the report definition to be changed and press Enter. The system returns you to the Rename a Report screen, displaying in the *Report name* field the name you selected.

4. In the *New name* field, type the name to be assigned to this report definition, beginning with a letter and using up to eight characters. Press Enter.

   The system renames the report definition.

5. Press F3 to exit to the *Report Maintenance* menu.

Using a Physical File as Input for a New Report

Purpose

Using the results of one report as input for another report lets you perform complex tasks that a single report definition cannot handle and lets you efficiently gather subsets of data without rerunning big jobs.

The following table summarizes two examples.

Problem	Solution Using Two Reports
Infinium QY cannot compare the values in two fields that have different lengths and you cannot use a Result String as a join between files. For example, you cannot compare a three-character company field in an Accounts Payable 2000 file with a five-character company field in an equivalent Infinium Payables Ledger file.	Define a report that uses the Result String feature to include only the applicable three characters of the Infinium PL value. Refer to the Defining Result Columns section earlier in Part 4 of this guide. Generate physical file output for this first report. Define a second report that includes the three-character company value from the physical output file and compares that value with the applicable corresponding three-character Accounts Payable 2000 company field.
You already run large detailed sales transaction reports in each of your divisions on a monthly basis. Headquarters' reward program office now wants a one-page summary of transactions meeting certain criteria on a bi-monthly basis.	Since you already generate data you need in the detailed reports, define a summary report that uses the detailed reports as input files. Run physical file outputs of the detailed reports at the end of each period. Later run the summary report for each relevant two-month period. Refer to the Infinium GL example at the end of this section.

The following pages provide details about these types of steps for these types of solutions.

Example Used in This Section

The explanation of a sample procedure in this section uses the following business scenario and solution:

- You are converting from Accounts Payable 2000 to Infinium Payables Ledger, and want to identify all companies in Accounts Payable 2000 file APPVO that are not also in the Infinium PL invoice header PLPVH file.
- To automate this cross-check, you need to compare these fields:

  Infinium PL:
  PLPVH file's *Invoice Company* field VHVECO (five characters)

  Accounts Payable 2000:
  APPVO file's *Voucher Company #* field VOVECO (three characters)
- If the company fields were the same length, you could join the PLPVH file and the APPVO file through the VHVECO and VOVECO fields, and specify an Unmatched Join to include company information without a match. Refer to the Joining Files through Shared Fields section earlier in Part 4 of this guide for information about using Unmatched Join Fields.
- Because the company field lengths differ, Infinium QY cannot compare the values in the two fields.
- Therefore, the solution is to create a first report definition that specifies using only three characters of the Infinium Payables Ledger company values and to generate a physical file from that first report definition. Refer to the Defining Result Columns section earlier in Part 4 of this guide for details about using substrings of a field.

  You can then create a second report to compare the three-character Infinium Payables Ledger company substrings in the first report with the companies in the Accounts Payable 2000 APPVO file.

Procedure

The following procedure uses the example of the business scenario and solution described above to compare a three-character company field in Accounts Payable 2000 with a five-character company field in Infinium PL.

The procedure includes:

1. Generating and storing the required data in a library IQY2000 physical output file.

   Note: You must be authorized to access library IQY2000 to perform the next step.

2. Defining a new report to include data from the first report's output
3. Running the new report

Generating the First Output File

Perform the following steps to generate the physical output file:

1. Define a report to capture the data you need, such as the applicable three characters from the Infinium PL company field.

   The following figure illustrates the result string definition for creating a new column that contains only the last three characters of the Infinium PL five-character invoice company value.

```
 8/24/95 12:11:30          Define Result Strings          QYISTR$    QYDDEF
_____________________________________________________________________________

Report name . . . . . . : PCOMPANY

New                                      Source     Substring    <or>   Append
Col#  Result column heading               Col#    Start  Length          Col#
 __   ________________________________    __      ___    ___            __
      ________________________________
_____________________________________________________________________________

 01   Invoice company (from PLDBFA)

 02   Result String: 3-char Inv Co        1       3      3             __
      ________________________________

_____________________________________________________________________________
F3=Exit  F8=Quick select  F9=Previous  F10=Quick access  F11=View selections
```

Figure 4-45: Result String screen with five- and three-character companies

2. Generate this first report in batch mode, typing **7** in the *Print Option* field and a name for the output file in the *Physical File* field at the Batch Run screen as illustrated in the following figure.

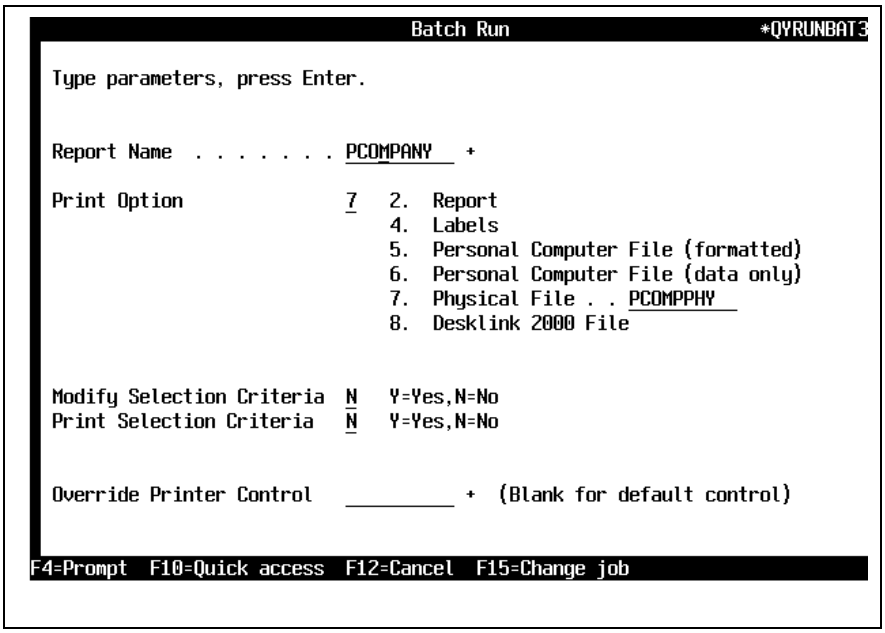


Figure 4-46: Batch Run screen with settings for generating a physical file

3. The system generates the physical file in batch mode, and stores the output in library IQY2000 under the specified file name. In the preceding example, the output contains two columns. The first column has the actual Infinium Payables Ledger invoice company values. The second column has the three-character versions of these invoice company values.
4. After the system submits the batch job, exit as usual.

Continue to the next subsection, Defining the Second Report.

Defining the Second Report

Perform the following steps to include the physical file you generated and fields from that physical file in a new report definition.

1. Follow the standard Create/Copy report definition procedure to name and specify report controls for the new report. Example: You might call the report **ACOMPANY** for Accounts Payable 2000 companies.
2. At the Select Libraries screen, select IQY2000. Also select other libraries if you plan to include additional data in the report, such as APDBFA for accessing Accounts Payable 2000 company data.

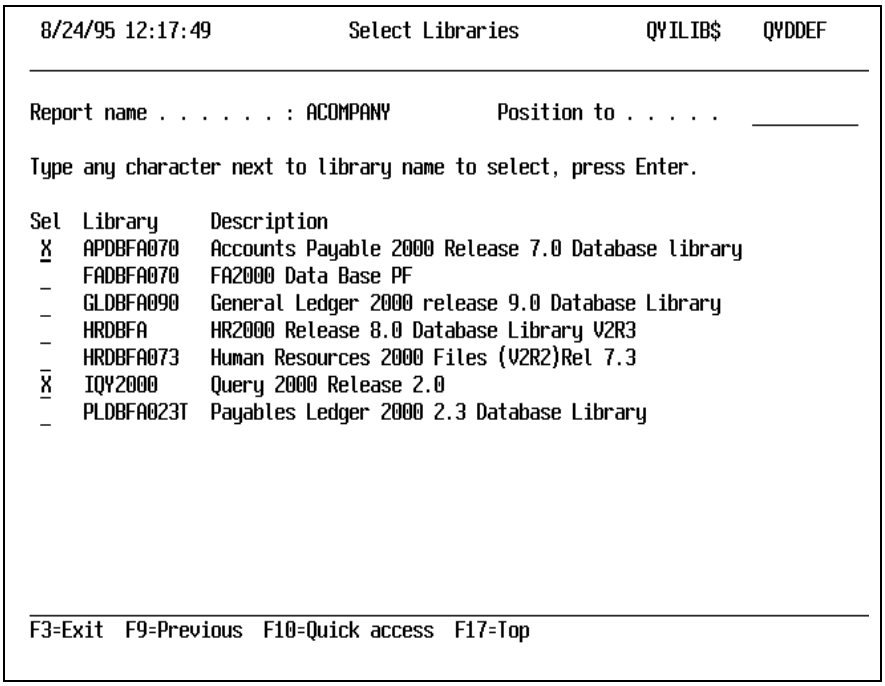


Figure 4-47- Select Libraries screen

3. At the Select Files screen, select the physical file you generated and stored in library IQY2000 such as PCOMPANY. Also select the other files containing fields to be included in your second report, such as the Accounts Payable 2000 APPVO file with the relevant voucher company data.

   Type **P** next to the primary file, such as APPVO, and number the secondary file or files as usual.

4. At the Select Fields screen, the system displays the fields for the files you selected. Number the fields in column order, as usual.

   Note: The fields for the physical file are called C1, C2, and so forth. use the field descriptions to identify the field or fields you need, such as C2, the three-charcater invoice company field. The field list also includes a *Record type* field, explained below.

   Each line of report output is a single record and contains a *Record type* field. The *Record type* field indicates the type of data in that record. There are detailed, total, maximum, and minimum record types, explained later in this section. You can select the *Record type* field for use as described in that explanation.

5. At the Define Selection Criteria screen, you can use values from the physical output fields you selected, including the *Record type* field values, to specify selection criteria for this second report.

6. At the Define Joins and Join Options screen, join the physical output file appropriately with the related file or files through a shared field. For example, you can use the Accounts Payable 2000 APPVO file's VOVECO field and the physical PCOMPPHY file's C2 field to join APDBFA to PCOMPPHY.

   You can use VOVECO and C2 for joining since they represent the same data (called voucher company or invoice company, depending on the system) and have the same length.

   To identify the Accounts Payable 2000 companies that are not listed in the PCOMPPHY file, press F3 to display the Join Type window and specify an unmatched fields join type.

When done defining the second report using data from the physical output file, generate the output for the second report.

In the case of the example in the preceding steps, the output identifies those Accounts Payable 2000 voucher companies that are not already listed in Infinium PL as invoice companies.

The following pages summarize designs for another pair of reports that use many of the techniques described earlier in this guide.

Finding Target Data in Infinium GL Detailed Reports

Suppose you need both detailed and summary reports. You can create definition for both types of report and run both reports against your database, which duplicates much of the processing effort. Or you can generate the detailed reports as physical files and define a summary report that extracts the data you want from the existing detailed reports.

The following report designs use a sample business scenario for this technique.

Business Scenario

You need the following reports:

- A detailed monthly sales transaction report that includes for each transaction the account number, the fiscal year and period, the date the transaction was accepted in Infinium General Ledger, the transaction amount, and the transaction description. This report is to contain only monetary amounts; it must exclude statistical amounts.
- A summary monthly report that lists for each division within each company the first sales transaction in excess of $100,000; this report was requested by a new Rewards Office at your corporate headquarters.

Note: In this example, your Infinium General Ledger controls define your chart of accounts as using the following format:

AAA-BBB-CCC-DDDD-EEE

AAA = Company such as 001
BBB = Division such as 001
CCC = Department such as 001
DDDD= Account, such as 4100 for sales
EEE = Subaccount, such as widget sales

Example: The sales account for Company 001, Division 001, Department 001 is **`001-001-001-4100`**.

Designing the Detailed Report

The table on the following page summarizes the design for the detailed report, which requires using three Infinium General Ledger files.

The design for the detailed report could use the following specifications. The library in each case is GLDBFA.

Design Element	File GLPCT (Chart of Accounts) = File 1	File GLPTX (Transaction Detail) = Primary File	File GLPTH (Transaction Header) = File 2
Field selections in Column Order	1. CTACCT (account) 7. CTPAGE (for join)	2. TXYEAR (year) 3. TXMNTH (period) 5. TXFAMT (amount) 6. TXDESC (description) 8. TXPAGE (for join) 9. TXJRNL (for join) 11. TXMORS (for selection of Monetary)	4. THHENT (accepted date) 10. THJRNL (for join)
Format	Do not print CTPAGE	Do not print TXPAGE, TXJRNL, TXMORS	Do not print THJRNL
Selection	CTACCT = ...-...-...-4100-* (sales accounts only) Or specify one report for each division by using 001-001-...-4100-* and so forth	TXYEAR = year of the period, such as 1995 TXMNTH = whichever period you are running within that year TXMORS = M	
Joining	Col 7 to Col 8	Col 9 to Col 10	

Design Element	File GLPCT (Chart of Accounts) = File 1	File GLPTX (Transaction Detail) = Primary File	File GLPTH (Transaction Header) = File 2
Sorting and Grouping	Group by CTACCT. Sorts: 1 = Col 1; 2 = Col 2; 3 = Col 3		
Result String	New Column = Col 12, consisting of first seven character of Col 1. This gives you a division identifier in the physical output file for use in the summary report later. You need to print this Div column in order to use the values in the summary report.		

Generate one or more detailed reports, depending on whether you run one detailed report for all accounts, or break out a separate detailed report for each division. At the Batch Run screen, use option 7 and specify a name for the physical file or, if you break out the reports by division, each physical file.

For this example, assume you call the physical output file SDTL795 when you run a consolidated detailed sales report for July 1995.

Designing the Summary Report

The following table summarizes the design for a summary report that uses the preceding detailed physical file SDTL795 to find the first sales transaction exceeding $100,000.00 within each division during the fiscal period July 1995.

Note that the columns are called C1, C2, and so forth in the physical file. Select the fields based on their headings. The physical file has whatever heading text you defined for each column in the definition of the detailed report.

Design Element	File SDTL795 (Primary and only file)
Report Title	First $100,000 Sales in Each Division, July 1995
Library	IQY2000
File	The physical output file's name, such as SDTL795
Fields	Column 1 = C12 Division identifier Column 2 = C4 Transaction Accepted Date Column 3 = C5 Transaction Amount Column 4 = C6 Transaction Description
Selection	Col 3 GT 100,000

Design Element	File SDTL795 (Primary and only file)
Sort and Grouping	Group on Column 1. Set the primary sort on Column 1. Set the secondary sort on Column 2, in ascending order. Set *First Match* to 1 on Column 1.

When you generate this report, the system prints the division identifier portion of the account number, and the date, amount, and description of the first sale greater than $100,000 for each listed division.

The first match specification ensures inclusion of only one transaction for each division.

The ascending sort order for the transaction date ensures that the first match is the earliest date found.

Using the Physical Output File's *Record Type* Field

Understanding the *Record Type* Field

When you generate a physical output file by typing **7** at the Batch Run screen and specifying an output file name, the system does the following:

- Writes each output record to the specified file in library IQY2000 as a single line in that file
- Includes an additional *Record type* field in each line to indicate what type of record this line contains

The *Record type* values are as follows.

Value	Meaning	Explanation
D	Detail	A regular data record for a line on a report
A	Average	Record derived from averaging values within a column in the report
T	Total	Record derived from calculating the total for values in a report group
M	Minimum	Record containing the minimum value in a column within a report group
X	Maximum	Record containing the maximum value in a column within a report group

Using the *Record Type* Field

The system does not display or print the *Record type* field values. But the system does display the *Record type* field at the Select Fields screen when you choose the physical output file as input for another report.

This option of selecting the *Record type* field in a report definition lets you include the *Record type* field in a report definition for such uses as defining record selection criteria.

For example, you can do the following to roll up a detailed weekly sales report in a summary fiscal month report for managment:

1. Define the weekly report to group and total the sales amounts by sales person, with group text of **`Total Sales for`**.
2. Define the monthly report to include each of the weekly report physical output files and select the *Record type* field for each of these files as an unprinted field.
3. Specify Record type EQ T as a selection criterion to include only the group (sales person) total lines from the weekly detailed reports.

Hands-On Workshop for Complex Reports

In this workshop you create a report extracting data from more than one file. You include a simple calculation in the report and print the file.

Note: If you are using a date field in a calculation, select the field that uses the Hundred Year Format (HYF).

Select one application for this workshop. Use the data and additional instructions on one of the following pages to perform the exercises for that application. The exercises are specified at the end of this workshop section.

Choose the application with which you most frequently work or are planning to work.

Caution: Set the Interactive record limit to a number such as **`20`** to limit the output for interactively testing of your definition.

Infinium Accounts Receivable

Use library TRAINQYAR and the following information to create a report listing customers with obligations over 60 days. Include the following:

Primary File	Secondary File	Field Descriptions
Aged Trial Balance (ARPTB)	Customer Master (ARPCU)	From ARPTB: AR Company Customer Number Aging Amount 3 (Amount outstanding over 60 days) Aging Amount 4 (Amount outstanding over 90 days) Aging Amount 5 (Amount outstanding over 120 days) Unapplied Cash From ARPCU: Customer Name AR Company Customer Number

Note: Include both the common (shared) data elements *AR Company* and *Customer Number* to join the primary and secondary files.

Additional Instructions

To calculate the total amount due over 60 days, add the values in the Aging Amount 3, Aging Amount 4, and Aging Amount 5 columns. This is a two step process:

1. Add Aging Amount 3 and Aging Amount 4 to create Value A. This is a derived result column.
2. Add Aging Amount 5 to Value A (the derived column) to determine the total amount over 60 days (a second derived column).

   Note: Do not print Value A on the report.

- Calculate the total outstanding for 60, 90 and 120 days as well as unapplied cash.
- Modify the column headings to fit the column width requirements.

Infinium Occupational Health

Use library TRAINQYEM and the following information to create a report listing OSHA injuries and illnesses by incident department within each company. Include the following:

Primary File	Secondary File	Field Descriptions
OSHA Detail (EMPOD)	Employee Health Master (EMPHM)	Company Accident Department code OSHA Case Number Incident Date (HYF) Employee Name Employee Number Occupation Injury/Illness Description OSHA 101 Case Number Date of Hire Risk Factor

Note: Include the common (shared) fields *Company* and *Employee Number* to join the files.

Additional Instructions

- Select only those OSHA cases that occurred after February 1, 1990.
- Modify the column headings to fit the column width requirements.

Infinium Fixed Assets

Use library TRAINQYFA and the following information to create a report listing the net corporate book value of a company's assets. Include the following:

Primary File	Secondary File	Field Descriptions
Asset Root Master (FAPAB)	Corporate Book (FAPAK)	From FAPAB: Company Number Asset Activity Flag Asset Number Asset Description From FAPAK: Asset Activity Flag Corporate Book Cost Corporate Book Accum Reserve Install Date (HYF)

Note: Include the common (shared) field *Internal Asset Number* to join the two files.

Additional Instructions Select only records in which both asset activity flags are blank.

Infinium General Ledger

Use library TRAINQYGL and the following information to create a report listing salesmen and their commission earnings. Include the following:

Primary File	Secondary File	Field Descriptions
General Ledger Transaction Detail (GLPTX)	Chart of Accounts (GLPCT)	From GLPTX: Company Sales Representative Customer Contract Date Sales Dollars (dollar value of the sales) Salesmen's Commission Percent From GLPCT: GL Account Number Account Number Description

Note: Also include the common (shared) page number fields to join the two files.

Additional Instructions

- Modify the column headings to fit the column width requirements.
- Change the sign for dollar amounts.
- Calculate the commission earned for each salesperson.
- Create a substring on the Result String screen to print only a portion of the General Ledger Account Number.

You do not need to print the Company value on this report.

Infinium Inventory Control

Use library TRAINQYMM to design a report listing all inventory in Company QY Warehouse 1. The report lists inventory along with some cost information. Include the following:

Primary File	Secondary File	Field Descriptions
Product Inventory (PRDINVEN)	Product Cost (PROCSTPF)	Company Location Product Size Inventory Type Quantity Current Cost

Additional Instructions

- Sort the report by Company, Location, Product Code and Size.
- Create a derived (result) column Value of Inventory. To calculate this value, multiply the Quantity by the Current Cost.
- Modify the column headings to fit the column width requirements.

Infinium Inventory Control or Infinium Purchase Management

Use libraries TRAINQYDM and TRAINQYPM to create a report entitled Purchasing Issues and Transfers–Allocated Inventory Report. Include the following:

Primary File	Secondary Files	Field Descriptions
Item Warehouse (IMPITMWH)	Req. Detail (PMPRD) Pick List (DMPPL)	Company Warehouse Item Code (Item Number) On Hand Quantity Requisition ID Sequence Number Allocated Quantity

Note: Include the common (shared) fields Item Code and Item Number as well as Sequence Number to join the files.

Additional Instructions

- Modify the column headings to fit the column width requirements.
- Create a derived result column called Available Quantity. Calculate this value by subtracting the Allocated Quantity from the On-Hand Quantity.
- Print the record counts for the Company, Warehouse and Item Code columns. Sort on company and warehouse.

- Provide averages for the On Hand Quantity values and totals for the Allocated Quantity values.

> **Caution**: At the Set Report Controls Screen, set the *Interactive record limit* to **20**.

Infinium Order Processing

Use library TRAINQYMM to design a report listing all salespersons for Company QY, the salespersons' YTD Sales, and their commission percentages. Include the following:

Primary File	Secondary File	Field Descriptions
Salesperson (OPPSLM)	Sales Analysis Salesperson (SASALSM)	Company Sales Region Name of Salesperson YTD Sales YTD Commission

Additional Instructions

- Modify the column headings to fit the column width requirements.
- Total the YTD Sales.
- Group the report by region and print counts for the region.
- Create a Commission Percentage derived (result) column. Calculate this value by dividing the YTD Commission by the YTD Sales.

Infinium Payables Ledger

Use library TRAINQYPL to design a report listing discounts taken and lost by vendor. Include the following:

Primary File	Secondary Files	Field Names
PLPVH	PLPVE PLPPH	From PLPVH: VHIREF VHHEXP VHHDTL VHHDSC VHVEND VHPSTS From PLPVE: VENAME VEVEND From PLPPH: VHVECO VHIREF VHHEXP VHHDTL VHHDLT

Note: Join the files by VHVEND with VEVEND.

Additional Instructions

Column Order and Totals:

- Use the following order of columns:
  VENAME, VHVECO, VHIREF, VHHEXP, VHHDTL, VHHDLT, VHHDSC, VHVEND, VEVEND, VHPSTS.
- Total the columns for inventory amount, discount taken, and discount lost (VHHEXP, VHHDTL, VHHDLT).

Printing:

- Do not print VHHDSC, VHVEND, VEVEND, and VHPSTS.

Breaks and Counts:

- Use a page break at each change of vendor name, printing the count for that vendor.
- Use a two line break at change of company (VHVECO).
- Use a three line break at change of internal ID (VHIREF).

Sorts:

- Sort Vendor, Company, and Internal ID in ascending order.

Selections:

- Exclude records with VHHDSC value **0**.
- Exclude records with VHPSTS value **0**.

Infinium Process Manufacturing

Create a report listing all the items used in both manufacturing and sales in Company QY Warehouse 4 and 5. Include the following:

Primary File	Secondary File	Field Descriptions
Productions Master (MANFILPF)	Product History (PRDHIST)	Company Location Item Description Size Quantity Used In Manufacturing Quantity Used for Customer Sales Usage Month

Additional Instructions

- Modify the column headings to fit the column width requirements.
- Sort the report first by Company, then by Location, and third by Productions Description and Size.
- Group the report by Location.
- Created derived (result) column Total Quantity Used. Calculate this value by adding the Quantity Used in Manufacturing to the Quantity Used for Customer Sales.
- Use only information for 1992.

Infinium Human Resources Report #1

Note: Choose one of the two Infinium Human Resources reports. If time allows, complete the second report also.

Use library TRAINQYHR to create a report listing all employees in company EGG hired after February 1, 1988, and each of the listed employee's weekly base pay rate. Include the following:

Primary File	Secondary File	Fields
Basic Data (PRPMS)	Personnel Master (PEPMS)	Employer Number Employee Complete Name Position Title Base Pay Rate Date of Hire (HYF) Base Rate Frequency Primary Language

Additional Instructions

- Use the Base Rate Frequency value **A** to select only those rates that are in an annual form.
- Divide the Base Pay Rate by an appropriate factor to calculate the weekly rate.
- Sort the data alphabetically by employee within position title within employer code.
- Modify the column headings to fit the column width requirements.
- Select only active employees by selecting only records with a blank Termination Code.

Infinium Human Resources Report #2

Use library TRAINQYHR to create a report listing all employees within company EGG along with their dependents.

Primary File	Secondary File	Fields
Employees Dependents (PEPDP)	Employee Root Master (PRPMS)	Employer Number Employee Number Dependent's Name Dependent's Date of Birth Dep. Social Sec. # Relationship to Employee Term Code

Note: Include the common (shared) Employer Number and Employee Number fields to join the files.

Additional Instructions

- Sort the report alphabetically by employee.
- Insert a break between employee records.
- Modify the column headings to fit the column width requirements.

Infinium Payroll Report #1

Note: Choose one of the two Infinium Payroll reports. If time allows, complete the second report also.

Use library TRAINQYHR to create a report listing employees in company EGG who were hired after February 1, 1988. Select only active employees and list each employee's last name, position code, and cycle code. Include the following:

Primary File	Secondary File	Fields
Root Master (PRPMS)	Payroll Master (PYPMS)	Employer Number Employee Number Last Name Position Cycle Base Pay Rate Term Code Pay Frequency Hire Date (HYF)

Note: Include the common (shared) Employer Number and Employee Number fields to join the files.

Additional Instructions

- Select only records with a weekly Pay Frequency.
- Multiply the pay rate by a 5% factor to calculate a proposed pay increase.
- Sort the report alphabetically by employee within cycle code within employer code.
- Modify the column headings to fit the column width requirements.

- Select only active employees by selecting only records with a blank value for the Termination Code.

Infinium Payroll Report #2

Use library TRAINQYHR to create a report showing all active employees within company EGG. List each employee's last name, reporting level, income code, date of hire, and position title. Include the following:

Primary File	Secondary File	Fields
Income Codes (PYPIE)	Root Master (PRPMS)	Employer Number Employee Number Department (Level 2) Last Name Income Code Date of Hire (HYF) Position Title Term Code

Note: Include the common (shared) Employer Number and Employee Number fields to join the files.

Additional Instructions

- Sort the report alphabetically by employees within reporting level.
- Insert a break between employees' records.
- Modify the column headings to fit the column width requirements.

Exercises

Plan a report

1. Determine which report you want to create.
2. Plan how you will lay out and define the report by completing the worksheets on the following pages. There are sufficient worksheets to enable you to plan two reports.

Design Plan Worksheets

Use the following worksheets to plan your report or reports.

Report Title:		
Library:	Library:	Library:
Primary File:	Secondary File:	Secondary File: (if needed)
Fields Needed:	Fields Needed:	Fields Needed:
Join Column:	Join Column:	Join Column:

Infinium QY Report Components Worksheet (Number 1 of 3)

Report Title:						
	Column __	Column __	Column __	Column __	Column __	Column __
Column Heading						
Field Name						
Libraries						
File						
Derived Column						
Calculations						
Result String						
Format Option						
Selection Criteria						
Group/Sort						
Join Column						

Infinium QY Report Components Worksheet (Number 2 of 3)

Report Title:						
	Column __	Column __	Column __	Column __	Column __	Column __
Column Heading						
Field Name						
Libraries						
File						
Derived Column						
Calculations						
Result String						
Format Option						
Selection Criteria						
Group/Sort						
Join Column						

Infinium QY Report Components Worksheet (Number 3 of 3)

Report Title:						
	Column __	Column __	Column __	Column __	Column __	Column __
Column Heading						
Field Name						
Libraries						
File						
Derived Column						
Calculations						
Result String						
Format Option						
Selection Criteria						
Group/Sort						
Join Column						

Design Plan Worksheets

Use the following worksheets to plan your second report.

Report Title:		
Library:	Library:	Library:
Primary File:	Secondary File:	Secondary File: (if needed)
Fields Needed:	Fields Needed:	Fields Needed:
Join Column:	Join Column:	Join Column:

Infinium QY Report Components Worksheet (Number 1 of 3)

Report Title:						
	Column __	Column __	Column __	Column __	Column __	Column __
Column Heading						
Field Name						
Libraries						
File						
Derived Column						
Calculations						
Result String						
Format Option						
Selection Criteria						
Group/Sort						
Join Column						

Infinium QY Report Components Worksheet (Number 2 of 3)

Report Title:						
	Column __	Column __	Column __	Column __	Column __	Column __
Column Heading						
Field Name						
Libraries						
File						
Derived Column						
Calculations						
Result String						
Format Option						
Selection Criteria						
Group/Sort						
Join Column						

Infinium QY Report Components Worksheet (Number 3 of 3)

Report Title:						
	Column __	Column __	Column __	Column __	Column __	Column __
Column Heading						
Field Name						
Libraries						
File						
Derived Column						
Calculations						
Result String						
Format Option						
Selection Criteria						
Group/Sort						
Join Column						

Exercise 4-2 Create the Report

1. At the Infinium QY main menu, select *Report Definition.*
2. At the *Report Definition* menu, select *Create/Copy*.
3. Create the report definition you planned in Exercise 4-1.

   Note: At the Set Report Controls screen, indicate that you want to store a copy of the report during batch generation of the report. You can use this stored copy (or a stored copy created later in step 5 of this exercise) for exercises in Part 5 of this guide.
4. At the Report Definition Options screen, press F5 to run an interactive query using this new definition.
5. Review the report output. Did you obtain the results you expected? If so, store a copy of the report.

Exercise 4-3 Modify the Report

Use the *Report Maintenance* menu's *Modify* option to make any appropriate modifications to your new report definition.

If the report is not exactly what you wanted, diagnose and correct the problem.

If the report is exactly what you wanted, congratulations! Now you can modify the report as you choose. For example, you can change the selection criteria or add an extra column to the report.

Once you are satisfied with your report definition, you can generate output interactively and print a copy of the output.

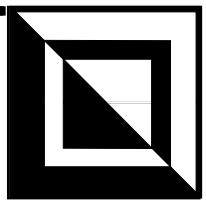
Exercise 4-4 (Optional) Plan, Create and Modify a Report

If time allows, plan, create, and modify a second report from the information for suggested reports provided earlier in this section.

Infinium HR
Infinium PY
Infinium OH

Using the report you created in Exercise 3-2 (Employee Listing), add the employee's home address to this listing. Modify the listing to include address line 1, city, state and zip code. Combine the city, state and zip code columns to list these values in a single column in the report.

Part 5



Generating and Working with Reports

This part of the guide explains how to generate, display, and print a report after you have completed and saved the report definition. It also explains how to use additional Infinium QY and related utilities in conjunction with working with your reports, as itemized in the following table of tasks.

Topic	Page
Running a Batch Report	5-3
Running a Report Interactively	5-14
Displaying, Printing, and Deleting Stored Reports	5-18
Printing a Report Detail Report	5-26
Downloading a Report to a PC	5-33
Releasing System Function Locks	5-38
Converting a QueryCalc Report	5-40
Hands-on Workshop	5-42

This part of the guide ends with a Infinium QY review exercise to help you review the material from Part 1 through Part 5. The review begins on page 5-43.

Objectives

This part of the guide is designed to help you learn to do the following:

- Generate a report in batch mode or interactively
- Specify the type of output you want generated in batch mode (report, labels, files for PCs, AS/400 physical files, and so forth)
- Work with the Infinium QY directories' stored report outputs
- Print a Report Detail Report describing your report definition
- Transfer a report to a PC
- Release a system lock on a function to make the function available
- Convert a QueryCalc Report

The workshop at the end of this part of the guide lets you practice generating, displaying, and printing a report. The review exercise following the workshop helps you review your understanding of Infinium QY.

Running a Batch Report

This section explains the following:

- Your choice of output formats for this run of the report
- The printer controls your Infinium QY Administrator must have defined, and optional printer controls the Administrator can define to meet special printing needs
- How to access the Batch Run screen

  Note: Batch submission screen is an alternative name for this Batch Run screen.
- How to use the F4 key to find the report definition that is to be run
- How to submit the batch job from the Batch Run screen

Choosing the Type of Output

Infinium QY lets you choose from a range of output options during report generation batch submission processes. The following table summarizes the values that you type in the Batch Run screen's *Output option* field.

Value	Result
2	Report (written to a spool file for printing)
4	Labels (written to a spool file for printing)
5	Personal computer file (formatted)
6	Personal computer file (data only)
7	Physical file (stored as an AS/400 physical file)
8	DeskLink 2000 file

The following topics provide more information about each of these choices and summarize their requirements.

Typing 2 for a Regular Printed Report

If you type **2**, the batch process generates a regular report. The process automatically generates a spool file for printing the report unless you have specified at the Set Report Controls screen that the output is to be stored. The system uses the printing instructions specified in Infinium AM printer control QYTOUTP unless you specify a different printer control in the Batch Run screen's *Override Printer Control* field.

The following printer control requirements apply:

- Your Infinium QY Administrator must have set up printer control QYTOUTP or the alternative printer control you specify.
- Your site may run multiple versions of Infinium QY such as production and training. If so, there must be a separate control QYTOUTP or alternative specified control for each version.

Refer to the following for more information about printer controls:

- Ensuring the Printer Controls Are Available, page 5-7 of this guide
- The *Infinium QY Administrator's Guide*

Typing 4 for Printed Labels

If you type **4** for label-format output, the batch process generates the report and automatically prints the labels as follows:

- The system stacks the report's first six columns vertically to create the label format. The format includes up to 60 characters per line.
- The system uses the printer and the applicable printing instructions specified in Infinium AM printer control QYTLABEL unless you specify a different printer control in the Batch Run screen's *Override Printer Control* field.

  If the labels are to be printed on peel-off label paper or on mail-house heat-sensitive label paper, that paper must be loaded on the printer specified in QYTLABEL before you release the spool file for printing.

  Peel-off label paper typically comes in one, two, or four columns (1 up, 2 up, or 4 up). Since *Infinium QY* prints the labels in 1-up format, meaning only in the first label column on the page, you may want to load the printer with single-column 1-up label paper to avoid waste.

Note: You can also specify storing the output in the report controls, generate and store the report output with option **2**, and later print the first six lines in label format from the Report Maintenance Directory.

The following printer control requirements apply:

- Your *Infinium QY* Administrator must have set up printer control QYTLABEL or the alternative printer control you specify.
- Your site may run multiple versions of *Infinium QY* such as production and training. If so, there must be a separate control QYTLABEL or alternative specified control for each version.

Refer to the following for more information about printer controls:

- Ensuring the Printer Controls Are Available, page 5-7 of this guide
- The *Infinium QY Administrator's Guide*

Typing 5 for a Formatted PC File

If you type **5** for a formatted PC file, the batch process stores the physical output file in the format you specified in the report definition. The system does not write the output to a spool file for printing.

After the system stores the file, you can use the IBM PC Support/400 utility to download the file to a personal computer. For instructions on this procedure, refer to the Downloading a Report to a PC topic beginning on page 5-33 of this guide.

Typing 6 for an Unformatted PC File

If you type **6**, the batch process stores the output file in a format you can download to a PC database or spreadsheet such as Microsoft Excel or Lotus 1-2-3. The format has commas between data elements.

Each comma represents a break between cells in the spreadsheet. This lets the PC database or spreadsheet tool know when to move to the next cell to enter the next piece of information.

The following examples show the difference between formatted and unformatted output:

Formatted:

City	**Employee**
Hyannis	Adams
	Benson
	Conley

Unformatted:

```
Hyannis,Adams
, Benson
, Conley
```

Note that the unformatted version omits the headings and includes just the data. The system does not automatically print this file.

After the system stores the output file, you can use the IBM PC Support/400 utility to download the file to a personal computer. For instructions on this procedure, refer to the Downloading a Report to a PC topic beginning on page 5-33 of this guide.

Typing 7 for a Physical File

If you type **7**, the batch process generates and stores the report as a physical file in the format specified in the report definition. The system stores this file in library IQY2000.

You can perform the following actions on the output file:

- Download the output to a PC text file using PC Support/400

  See the PC Support/400 documentation for details.

- Use the physical output as a source of data for another report.

  Example: You have five different reports that calculate different statistics. You can define a sixth report that chooses fields from the stored physical files for these five reports in order to generate a summary of all your statistical analyses in one new sixth report.

Caution: When you generate an AS/400 physical file, the system stores the file in library IQY2000. This library and its files are available for your selection in a report definition only if your *Infinium QY* Security Administrator has performed a *Infinium QY* generic conversion on that library.

For more information about security conversions, refer to the *Infinium QY Security Guide*.

The following table explains the difference between stored report output and physical file output.

File Type	Description
Stored Output	The file contains the full report, including headings, formatting, and data. You can access the report only through the *Infinium QY* Report Maintenance Directory, which lets you display the output on your terminal, print the output, and delete the output file. Refer to the Displaying, Printing, and Deleting Stored Reports section later in Part 5 of this guide for details.

File Type	Description
Physical File	The file contains only the data. You can use this file as an input file for another report. Refer to the Using a Physical File as Input for a New Report section earlier in Part 4 of this guide.

Typing 8 for an Infinium DeskLink File

If you type **8,** the batch process generates the output in a format that lets you later download the output to your PC using Infinium DeskLink.

For information on using Infinium DeskLink, refer to the following documents:

- *Guide to Infinium DeskLink*
- *Infinium DeskLink Quickstart Card*

Ensuring the Printer Controls Are Available

Printer controls tell your system where and how to print report outputs. Your *Infinium QY* Administrator sets up the printer controls. The following table summarizes the requirements for printer controls under various conditions. Use this table for background to help you consult your Administrator if you have printing problems.

Note: For your reference, this table identifies the printer controls for batch job outputs and other *Infinium QY* outputs. For details on setting up the controls see the *Infinium QY Administrator's Guide.*

Conditions	Printer Control Requirements
You generate regular reports.	Control QYTOUTP is required. If your site runs more than one version of Infinium QY (such as production and training versions), you must have a separate QYTOUTP printer control for each version of Infinium QY.
You generate labels.	Control QYTLABEL is required. If your site runs more than one version of Infinium QY (such as production and training versions), you must have a separate QYTOUTP printer control for each version of Infinium QY.
You need a user-specific control for regular reports or labels or both.	Must define an additional QYTOUTP or QYTLABEL printer control or both with the user's user profile name supplied in the printer control's *User profile* field.

Conditions	Printer Control Requirements
You need a report-specific control for a particular regular report or label report.	Must define an additional printer control similar to QYTOUTP or QYTLABEL with the user-defined report definition name in the control's *Printer file* field.
You want to override the default printer control for printing a *Directory* report.	Must define printer control QYTRPRPT.
You want to override the default printer control for the Report Detail Report.	Must define printer control QYTRPTDTL.
You want to override the default printer control for generating a regular or label report in batch mode for that batch job only.	Must have the desired printer control. You must type that printer control's name in the *Override Printer Control* field at the Batch Run screen during report generation.

Accessing the Batch Run Screen

Infinium QY provides two ways to access the Batch Run screen for submitting report generation as a batch job.

Step	Using Report Generation	Using Report Maintenance
1	At the Infinium QY main menu, select *Report Generation*.	At the Infinium QY main menu, select *Report Maintenance*.
2	At the *Report Generation* menu, select *Batch Run*.	At the *Report Maintenance* menu, select *Directory*.
3	The system displays the Batch Run screen. Go directly to the next topic, Submitting a Job from the Batch Run Screen, beginning on the next page of this guide.	At the Display Report Directory screen, specify selection criteria for the directory by typing any character in the *Sel* field next to the criterion you want. If necessary, refer to the display report directory procedure later in Part 5 of this guide for an explanation of your choices. Example: Type **x** next to the Select by report name entry and type the name of the report definition to the right of this entry. Then press Enter.

Step	Using Report Generation	Using Report Maintenance
4		At the Report Directory screen, type **7** in the *Opt* field next to the report's name and press Enter. The system displays the Batch Run screen. Go to the next topic, Submitting a Job from the Batch Run Screen, beginning on the next page of this guide.

The system displays the following Batch Run screen when you follow either of these procedures.

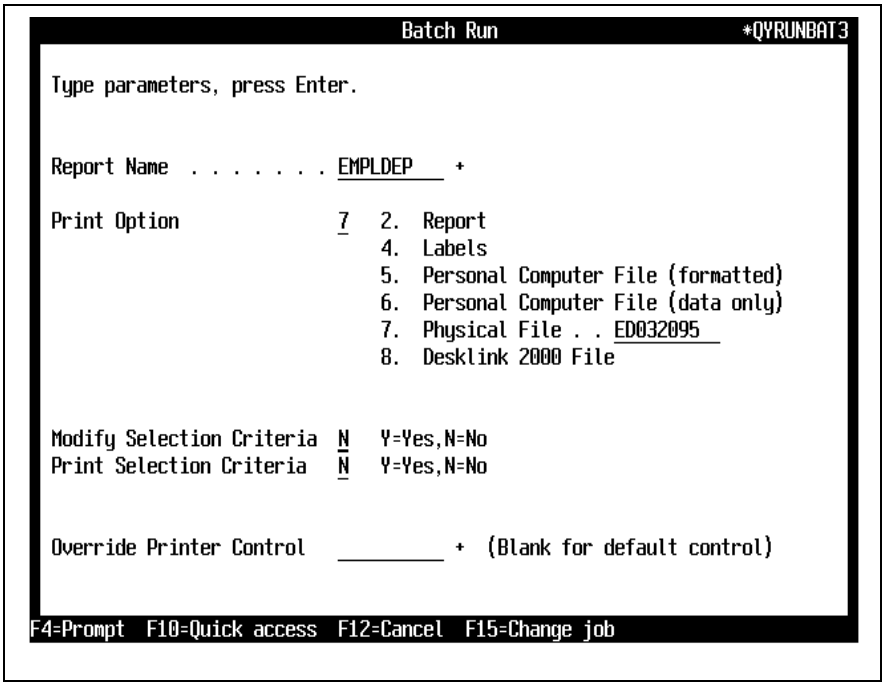


Figure 5-1: Batch Run screen

Pressing F4 in the *Report Name* Field

If you press F4 with the cursor in the *Report Name* field to list the available report definitions, the system lists only definitions with names alphabetically after the current value in the *Report Name* field. If you know the definition name starts with S, type **S** before pressing F4. To view the entire list, type a blank space over each character in the field, using the spacebar. Pressing FieldExit does not clear this field.

Submitting a Job from the Batch Run Screen

> **Caution:** Instructions you specify during this task apply only to the current batch job and do not affect the original report definition.

Perform the following steps to submit the batch job:

Report name

Type the user-defined name of the report in the *Report name* field.

Output option

Type a number (**2**, **4**, **5**, **6**, **7**, **8**) in the *Output option* field. Refer to Choosing the Type of Output earlier in this section for details.
If you type **7**, type a name for the physical file to the right of the listed Physical file option. The name must have no more than eight characters. The system writes the report to library IQY2000.

Modify selection criteria

Type **Y** or **N** in the *Modify selection criteria* field. If you type **Y**, Infinium QY displays the Define Selection Criteria screen when you press Enter at the Batch Run screen as described later in step 6.

Print Selection Criteria

Type **Y** or **N** in the Print Selection Criteria field.

If you type **Y**, the system generates a one-page summary of your selection criteria in addition to the report when you submit the job. See Examining the Selection Criteria Page on page 5-11.

Override Printer Control

If you want to override the default printer control for this batch job, type the name of an alternative printer control.

When you have typed your specifications for the batch job, press Enter to submit the job.

If you specified modifying the selection criteria, the system displays the screen illustrated in Figure 5-2.

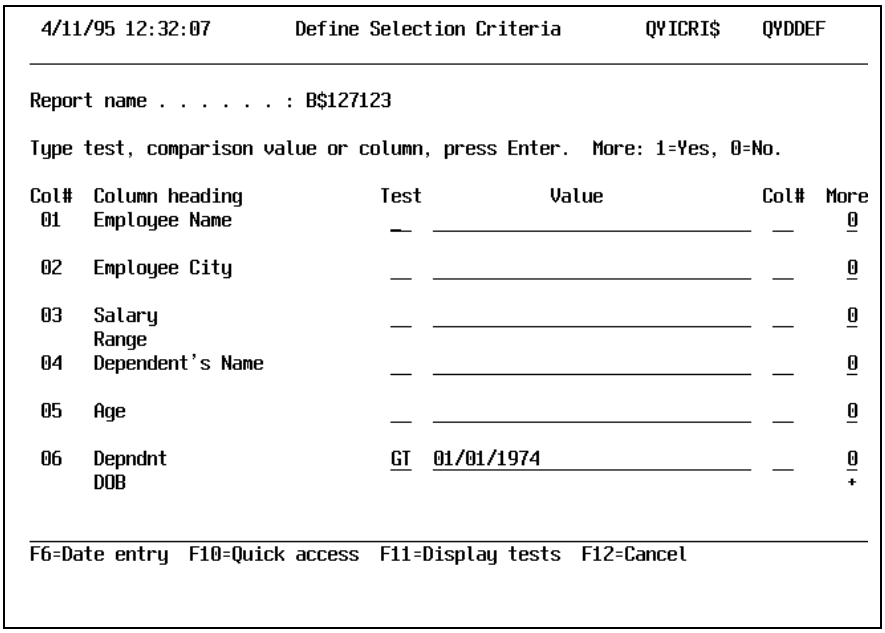


Figure 5-2: Define Selection Criteria screen for a batch run

If the system does not display this screen, continue to step 8. If the system displays this screen, edit the screen as described for specifying selection criteria in Part 4 of the guide, and press Enter.

Note: The report name on this screen is the name of the specific batch job, not the user-defined name of the report.

When you press Enter, the system does the following:

- Checks your authority to run this report
- Submits the batch job if you are authorized to run the report
- Returns you to the menu or directory from which you started

Refer to the Choosing the Type of Output topic earlier in this section for descriptions of how the system processes your specifications.

Examining the Selection Criteria Page

If you typed **Y** in the *Print Selection Criteria* field at the Batch Run screen before submitting the job, the system generates both the report and a one-page summary of the selection criteria you used for this run.

- The file containing this page is called QYTSELECT.

- The summary in the QYTSELECT file is called the Batch Run Selection Criteria page.

The following table describes the information on the Batch Run Selection Criteria page.

Column Heading	Explanation
Logical	The **and** or **or** logic indicator, used only for a multiple-test selection
Sel	The report column used for the selection criterion listed on this line
Field	The system's name for the field specified in the selection criterion
Test	The comparison type used for this selection criterion, such as **GT** for greater than or **EQ** for equal to
Criteria	The field's value used for this comparison Example: If the *Test* value for a date field is **GT** and the *Criteria* value is 01/01/1974, the report includes only records that have a date later than January 1, 1974 in the specified field.
Column	Column number used for comparison if the test involves comparison with the value in another column rather than comparison with a fixed test value.

The following page illustrates the format of this one-page summary.

```
QYIREPORT    QYTSELECT     B$12710033 B A T C H   R U N   S E L E C T I O N   C R I T E R I A                    Page   1

 4/11/95     11:27:42      EMPLDEP    Employee List with Dependents                                                QY2000

Selection Criteria

Logical  Sel  Field        Test  Criteria                       Column

=======  ===  ==========   ====  ==============================  ======

         06   DPDBH         GT   01/01/1974

                                        **********       End of Selections          **********
```

Running a Report Interactively

Purpose of Interactive Report Generation

Interactive reporting is useful for testing a report definition by checking the look of the output before you run the report in batch mode. The output displayed on your screen contains sample data.

The output may be incomplete. Refer to the following warning.

WARNING

Infinium QY limits the output for an interactive run to the number of records specified in the *Interactive record limit* field at the Set Report Controls screen. The maximum value in this field is **1000**.

Before using interactively run output for anything other than a format check and before storing the displayed output, ensure that the number of records in the output is less than the number in *the Interactive record limit* field. If the number of records is equal to the number in the *Interactive record limit* field, the report is probably incomplete.

If a report is going to have more records than interactive record limit allows, generate the report in batch mode.

In addition, interactive generation works only for report definitions containing two or more fields. If the definition has only one field, select any second field and mark the field as not to be printed before attempting interactive generation.

The table on the following page summarizes the ways to generate report output interactively.

Three Ways to Generate Output Interactively

The following table summarizes the three ways you can generate report output interactively.

Path	Action
At the Report Definition Options screen in *Report Definition* or *Report Maintenance*	Press F5.
At the *Report Generation* menu	Select *Interactive Run*. At the Interactive Run screen, type the name of the report definition and press Enter.
At a *Report Maintenance* directory (see Note after this table)	Type **3** next the name of the report you want to generate and press Enter.

Note: To display a customized *Report Maintenance* directory, select *Directory* at the *Report Maintenance* menu, specify the desired directory contents as described in Part 4 of this guide, and press Enter.

When you perform any one of the three actions described in the preceding table, the system generates report output interactively and displays the Display Report Output screen.

```
 3/14/95 15:54:40          Display Report Output          QYIIRD     QYDDEF
_____________________________________________________________________________
Report name . . . : EMPLDEP      Copy# . : 00   Find . . .
Line# . . 0001 of 0009         Col# . . 001 of 132         Hold to col# . .  00
----+----1----+----2----+----3----+----4----+----5----+----6----+----7----+----
                                                      Salary
Employee Name         Employee City                   Range   Dependent's Name
====================  ==============================  ======  ================
LINDA                 BURLINGTON                         NE5  BRENDA FISH

                       Total Employees w/ Minor Dependents, This City: BURLING


-----------------------------------------------------------------------------
Total records selected in report. . .:      1

                                        **********           End of Report




_____________________________________________________________________________
F3=Exit  F5=Print  F6=Store output  F8=Find  F24=More keys
```

Figure 5-3: Display Report Output screen showing left side of report

Refer to the following page for more information.

If the report is more than 78 characters wide, the initial display shows only the left side of the report. If the report has more than a few entries, the display shows only the top portion of the report.

You can use function keys and special display-option fields to shift the display and perform other actions as follows:

- Press F19 and F20 to shift the display left and right, and press F17 to redisplay the top of the report after paging through the contents.
- Type a value in the *Find* field and press F8, or type values in the *Line#*, *Col#*, and *Hold to col#* fields and press Enter, to control various aspects of the display. You can find particular contents in the report and set the display to particular vertical and horizontal positions within the report. You can also split the display to show key data from the far left columns while also showing data from the far right side of a wide report.

  Refer to the Displaying, Printing, and Deleting Stored Reports section next in Part 5 of this guide for details. The Display Report Output screen has identical choices and procedures for interactive and batch report outputs.
- Press F5 to print the output or F6 to store the output. Before printing or storing the report, refer to the warning on the preceding page. Also, you must have saved the definition before storing output.

```
 3/14/95 16:15:11          Display Report Output          QYIIRD     QYDDEF

Report name . . . : EMPLDEP      Copy# . : 00   Find . . .
Line# . . 0001 of 0009         Col# . . 079 of 134         Hold to col# . .  00
-8----+----9----+---10----+---11----+---12----+---13----+---14----+---15----+--
                                    Depndnt     Yrs
                          Age       DOB         Left
=======================  ==========  ==========  =======
                                 3   12/09/1985      18

TON                     . . :     1



          **********




F3=Exit  F5=Print  F6=Store output  F8=Find  F24=More keys
```

Figure 5-4: Display Report Output screen (right side of report)

When done working with the output, press F3 to exit this screen.

Displaying, Printing, and Deleting Stored Reports

Using Directories of Stored Reports

Options within the following menus let you display, delete, or print the output files for reports you have generated. You can use these options to perform the following tasks:

- *Report Maintenance*

  To generate a directory of stored report outputs and display, print, or delete a listed output file

- *Report Generation*

  To display a particular stored output file for a particular report and print the file

- *Utilities*

  To print a list of stored report outputs

The table on the following page summarizes the various paths for accessing stored report outputs in each of these functional areas, and the actions available through each these options.

The pages after the table explain how to display, print or delete a stored report. Since working from a *Report Maintenance* directory provides the widest choice of action, the instructions describe using those directory options for these tasks. This section then closes with instructions for printing a list of the stored report outputs currently on your system.

Infinium QY Stored Reports Quick Reference Table

Refer to the following table for information about the various menu options and available actions associated with Infinium QY stored report directories.

	Report Maintenance	***Report Generation***	***Utilities***
Path	Select *Directory* to display the Display Report Directory screen. Type any character next to *Select stored reports* to display a list of the currently stored outputs.	Select *Display Stored Output*. Then type *Report name* and *Stored copy #* values to indicate the report and version of that report you want and press Enter. **Note:** You can press F4 to view and select from a list.	Select *Reports*. Then select *Directory* to display the Print Report Directory screen. Type any character next to *Select stored reports* and press Enter.
Actions	Next to a report, type **4** to delete, **5** to display, or **6** to print the report and press Enter. Or press one of the following: F3 to exit F5 to refresh the list F10 to display the QuickAccess window F12 to cancel this function F17 to return to the top of the list If you display report output, you can perform the same actions as listed in the next column under *Report Generation*.	When the system displays the output, press one of the following: F3 to exit F12 to cancel F5 to print F6 to store (not applicable) F8 after typing a value in the *Find* field, to find a section of the output (see details later in this section) F10 to display the QuickAccess window F17 to return to the top of the report display F19 to shift display left F20 to shift display right Refer to the details later in this section.	The system displays the message, **`Utility report processing complete`**, and prints a list of the currently stored report outputs. Press F3 to return to the *Reports* menu. **Note:** To override the default printer control for this report, your Infinium QY administrator must define printer control QYTRPRPT.

Using *Report Maintenance* to Display, Print, or Delete Output

This topic explains how to use the *Report Maintenance* menu's *Directory* function to display, print, and delete a stored report.

Accessing the Stored Report Directory

Perform the following steps to access stored report output:

1. At the Infinium QY main menu select *Report Maintenance*.
2. Select *Directory*.

   The system displays the Display Report Directory screen.
3. Type any character in the *Sel* field next to *Select stored reports*.

   The system displays the Display Stored Reports screen.

```
 8/23/95 12:19:05        Display Stored Reports          QYISLST    QYDSLST

                                                Position to . . . . .

Options:  4=Delete  5=Display  6=Print


Opt  Report     #  Title                          Owner      Last stored
 _   DPVNDCRB  01  Vendors with credit balances - DLP        10/05/94  14:39
 _   DPVNDCRB  02  Vendors with credit balances - DLP        10/05/94  14:53
 -   EMPLDEP   01  Employee List with Minor Depen QY2000     08/23/95  12:18
 _   PLDSCT    01  DISCOUNTS TAKEN AND LOST BY VE AM2000     11/09/94  14:54
 _   PLPDINV   01  PAID INVOICES REPORT BY VENDOR VMR        10/05/94  14:18
 _   PLPDINV   02  PAID INVOICES REPORT BY VENDOR VMR        10/05/94  17:02
 _   PLPDINV   03  PAID INVOICES REPORT BY VENDOR VMR        10/05/94  17:05
 _   PLPDINV   04  PAID INVOICES REPORT BY VENDOR VMR        10/05/94  17:20
 _   PLPDINV   05  PAID INVOICES REPORT BY VENDOR VMR        10/05/94  17:27
 _   PLPDINV   06  PAID INVOICES REPORT BY VENDOR VMR        10/05/94  17:58 +




F3=Exit  F5=Refresh  F10=Quick access  F12=Cancel  F17=Top
```

Figure 5-5: Display Stored Reports screen

   This screen lists the currently stored report outputs by name, number of the stored copy, report title, report owner, and last date stored. You can display, print, or delete any listed stored copy, as described on the following pages of this guide.

4. If necessary, press PgDn to page through the list and find the stored report with which you want to work Then go to the subsubsection in the following pages for the appropriate task (Displaying the Stored Output, Printing the Stored Output, or Deleting the Stored Output).

Displaying the Stored Output

Perform the following steps to display stored report output:

1. At the Display Stored Reports screen shown on the preceding page, type **5** in the *Opt* field next to the output you want. Press Enter.

   The system displays the Display Report Output screen.

```
 8/23/95 12:04:20          Display Report Output          QYIIRD     QYDDEF

Report name . . . : EMPLDEP      Copy# . : 00   Find . . .
Line# . . 0289 of 0297         Col# . . 001 of 134         Hold to col# . .  00
----+----1----+----2----+----3----+----4----+----5----+----6----+----7----+----
                                                    Salary
Employee Name         Employee City                 Range   Dependent's Name
====================  ============================  ======  ================
CLAUDETTE             WINNEBAGO                      MULTX  JOHN CLAUDEL

                        WINNEBAGO


------------------------------------------------------------------------------
Total records selected in report. . .:    127

                                        **********           End of Report




F3=Exit  F5=Print  F6=Store output  F8=Find  F24=More keys
```

Figure 5-6: Display Report Output screen

The following table summarizes function key actions you can perform at this screen; refer to the following page for additional available actions:

Key	Description
F5	To print a copy of the output
F6	To store another copy of the output
F8	To find a specific record in the output (refer to step 2 on the following page for details)
F17	To go to the top of the displayed output
F19	To move the current display to the left
F20	To move the current display to the right

2. If you want to find a particular item in a long report, do the following:

   Type a value or a partial value in the *Find* field at the top of the screen and press F8. For example, to find the first record that includes the word Hyannis, type **Hyannis** or just **Hy**, and press F8.

   The system searches the output and displays the first portion of the output that contains that value. This field is case sensitive. Therefore, you must type the text exactly as it appears in the report, using capital letters and lower cases exactly as in the value you want to find. For example, type **Hy**, not **hy** or **hY**, to find Hyannis.

3. Use the fields described in the following table to shift the report to display a particular portion, with or without modifying the selection of columns to be simultaneously displayed.

Field	Action
Line#	This field relates to the length of the displayed report. The value to the immediate right indicates the report's length measured in lines. Type a line number to shift the display to that portion of the report and press Enter. The system shifts the view accordingly. To return to the initial position, type **0000**.
Col#	This field relates to the width of the displayed report. The value to the immediate right indicates the report's width measured in columns, counting each character position as a single column. Type the number of the column to which you want to shift the report view and press Enter.. The system shifts the view accordingly. To return the view to its initial horizontal position, type **000**.
Hold to col#	Use this field to specify the number of columns you want to remain stationary in the display, while you shift the remainder of the display. For example, if you type **10** in this field, character positions 1-10 remain stationary. The system displays a vertical line between the stationary positions and the rest of the display. You can then press F19 and F20 to shift the non-stationary portion while the stationary portion remains fixed. You can also type a value in the *Col#* field to shift the display by that value. To return to the initial non-stationary view, type **00** in the *Hold to col#* field. **Note**: If you press PgDn or PgUp, to scroll up and down, the system shifts the entire display, including the stationary portion.

4. Press F3 to return to the Display Stored Reports screen. Press F3 again to return to the Display Report Directory screen.

Printing the Stored Output

Perform the following steps to print a stored report:

1. At the Display Stored Reports screen, type **6** in the *Opt* field next to the report that you want to print and press Enter.

   The system displays the Print Output screen and supplies the report name and copy number you selected at the Display Stored Reports screen. You can press F4 to choose a different copy.

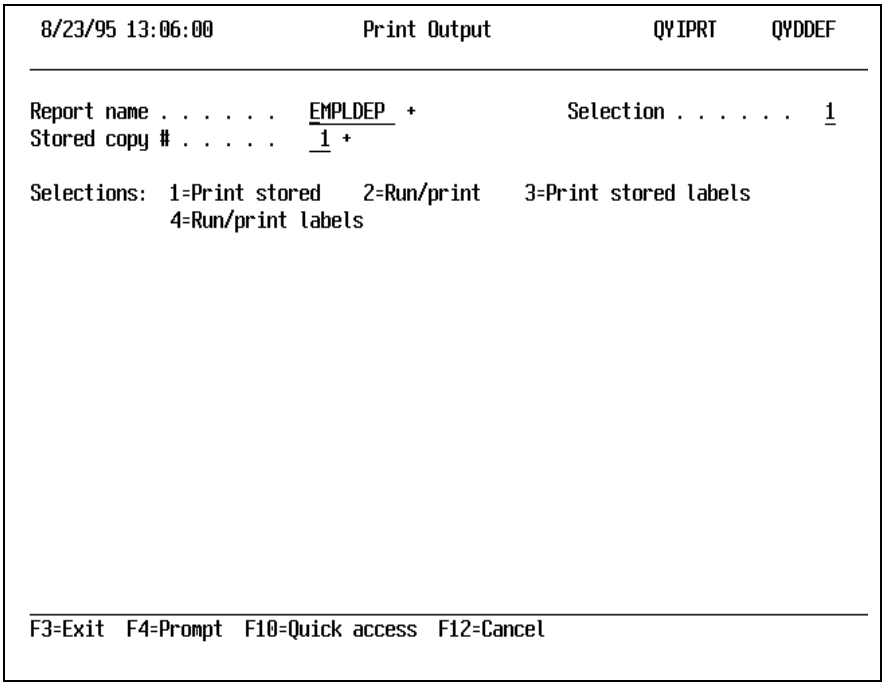


Figure 5-7: Print Output screen

2. Type one of the following in the *Selection* field and press Enter.

Type	Action
1	To print the stored output
2	To run and store the output if you specified store at the Set Report Controls screen; to run and print the output if you did not specify store in the report controls.
3	To print the stored output in label format
4	To run and store label output if you specified store at the Set Report Controls screen; to run and print the labels if you did not specify store in the report controls.

3. The system processes the request, displays a message that the request was normally completed, and automatically returns you to the Display Stored Reports screen.
4. Press F3 to return to the Display Report Directory screen.

Deleting Stored Output

When you delete a report definition, the system automatically deletes all the stored outputs generated from that definition.

Perform the following steps to delete stored report output manually:

1. At the Display Stored Reports screen, type **4** in the *Opt* field next to the report that you want to delete and press Enter.

   The system displays the Confirm Delete Reports screen.

```
_ 8/23/95 13:11:47        Confirm Delete Reports          QYISLST    QYDSLST

Press ENTER to confirm request to Delete stored reports.
Press the Cancel key to cancel the request.

     Report     #  Title                          Owner      Last stored
     EMPLDEP   01  Employee List with Minor Depen QY2000     08/23/95  12:18

F12=Cancel
```

Figure 5-8: Confirm Delete Reports screen

2. Press Enter to confirm the request for deletion or press F12 to cancel the deletion request.

   If you press Enter, the system deletes the stored report, displays a message that the deletion is complete, and automatically returns you to the Display Stored Reports screen.
3. Press F3 to return to the Display Report Directory screen.

Printing a Directory of Stored Report Outputs

Perform the following steps to print a list of the currently stored report outputs:

1. At the *Utilities* menu, select *Reports.*
2. At the *Reports* menu, select *Directory*.

   The system displays the Print Report Directory screen.
3. Type any character next to the *Select stored reports* option and press Enter.

   The system displays a message that the processing is complete and submits the list of the stored reports to the printer.

   Note: Your Infinium QY Administrator can override the default printing controls for this listing by creating alternative printer control QYTRPRPT in Infinium Application Manager

   After submitting the list of stored reports to the printer, the system remains at the Print Report Directory screen.
4. Press F3 to return to the *Reports* menu.

Printing a Report Detail Report

Purpose of the Report Detail Report

The Report Detail report summarizes information about a single report definition. The details help you perform such tasks as the following:

- Analyze and correct a problem with a report definition
- Identify potential improvements to the report design
- Use the report as a reference when creating the same report or a similar report on another AS/400 machine

For details and an illustration of the Report Detail report, refer to the topic later in this part, Reviewing the Report Detail report.

Generating the Report Detail Report

Perform the following steps to generate the Report Detail report for a specified report definition:

1. At the Infinium QY main menu, select *Utilities*.
2. At the *Utilities* menu, select *Reports*.
3. At the *Reports* menu, select *Report Detail*.

   The system displays the Report Detail Report screen.

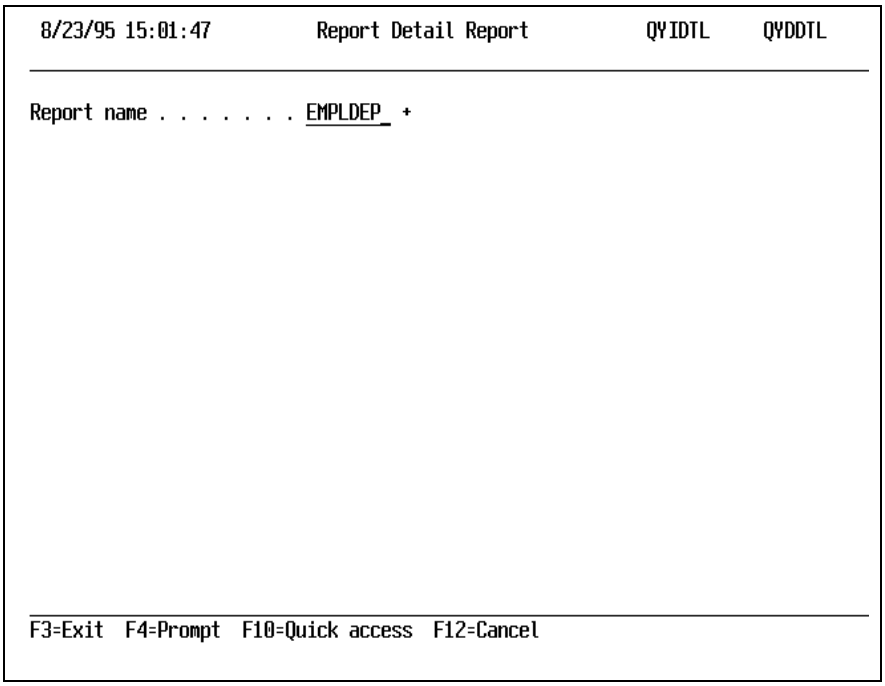


Figure 5-9: Report Detail Report screen

4. In the *Report name* field, type the name of the report definition for which you want to print a report detail report.

   Note: You can also press F4 to prompt and display a list of report definitions. If necessary press PgDn to page through the list to locate the report with which you want to work. Type any chacracter next to the report definition, and press Enter. The system returns you to the Report Detail Report screen with the selected report definition's name supplied in the *Report name* field.

5. Press Enter to generate the Report Detail Report for the specified report definition.

   The system verifies your authority to access this definition, displays a confirmation message, and immediately generates the Report Detail Report interactively for the specified report definition.

6. To find the Report Detail report output, display an AS/400 command line, type **WRKSPLF** (the Work with Spool File command) and press Enter. Look for QYTRPTDTL. Follow the standard AS/400 procedures to work with QYTRPTDTL. If necessary, consult your supervisor for local instructions for this step.

7. When you exit from the command line, the system redisplays the Report Detail Report screen with a blank value in the *Report name* field. Press F3 twice to exit this function and to return to the *Utilities* menu.

Reviewing the Report Detail Report Output

The Report Detail report contains the following sections:

- Identifying information
- Selected Libraries
- Selected Files
- Selected Fields
- Result Columns
- Format Options
- Join Definitions
- Selection Criteria
- Sorting and Grouping

The following pages provide an illustration of the Report Detail report output and an explanation of each report section's contents.

```
QYIRPTDTL    QYTRPTDT                                  Infinium QY Report Details                                    Page          1
95/08/23     14:08:04                                                                                                 QY2000
Report     Owner      Report                                                  Summary  Store   Last Modified
Name       ID         Title                                                   Only     Output  Date      Time
========== ========== ================================================  =======  ======  ==================
EMPLDEP    QY2000     Employee List with Minor Dependents                     N        N    08/23/95  12:18:47

Selected Libraries
Library     Description
==========  ==================================================
HRDBFA073   QY Training lib - HR files

Selected Files
Sel  File       Description                                          Library
===  ========== ================================================   ==========
1    PEPDP      Employee Dependents File                             HRDBFA073
P    PRPMS      Employee Root Master File                            HRDBFA073

Selected Fields
                                                  -------------Input-------------  -------Output--------
Sel  Field      Header                             Position Length Digits Decimals  Start Length Decimals  Library     File
===  ========== ===================================  ======== ====== ====== ========  ===== ====== ========  ==========  ==========
01   PRCOMN     Employee Name                          1169     20                      1     20           HRDBFA073   PRPMS
02   PRCTY1     Employee City                           224     30                     23     30           HRDBFA073   PRPMS
03   PRSRG      Salary                                  958      5                     55      6           HRDBFA073   PRPMS
                Range
04   DPDNM      Dependent's Name                         18     39                     63     39           HRDBFA073   PEPDP
05   DPDAG      Age                                      57      3      3             104     10           HRDBFA073   PEPDP
06   DPDBH      Depndnt                                  60      6      6             116     10           HRDBFA073   PEPDP
                DOB
07   DPEN       EMPLOYEE-dependent file-not printing      4      9                             9           HRDBFA073   PEPDP
08   PREN       EMPLOYEE NUMBER-empl file-not printg      4      9                             9           HRDBFA073   PRPMS
09   *RESULT    Intermed result-not printing                                                   5
10   *RESULT    Yrs                                                                  128      7
                Left
11   PRER       EMPLOYER NUMBER                           1      3                             3           HRDBFA073   PRPMS
12   DPER       EMPLOYER                                  1      3                             3           HRDBFA073   PEPDP

Result Columns
                                                  ------------Numeric------------  ----------String----------
     Result                                Column              Column                 Start             Append
Sel  Header                                Factor 1   Operand  Factor 2  Value        Position  Length  Column
===  ===================================  ========   =======  ========  ============  ========  ======  ======
09   Intermed result-not printing            05         -                        21
10   Yrs                                     09         *                        -1
     Left
```

```
QYIRPTDTL    QYTRPTDT                                  Infinium QY Report Details                                    Page          2
95/08/23     14:08:04                                                                                                 QY2000
```

Format Options

Sel	Field	Justification	Leading Symbol	Separation Character	Decimal Char	Date Conversion	Total	Average	Maximum	Minimum
			Numeric Flags							
01	PRCOMN	LEFT								
02	PRCTY1	LEFT								
03	PRSRG	CENTER								
04	DPDNM	LEFT								
05	DPDAG	RIGHT			.	N	N	N	N	N
06	DPDBH	RIGHT			.	Y	N	N	N	N
07	DPEN	LEFT								
08	PREN	LEFT								
09	*RESULT	RIGHT			.	N	N	N	N	N
10	*RESULT	RIGHT			.	N	N	N	N	N
11	PRER	LEFT								
12	DPER	LEFT								

Join Definitions

From Sel	From Field	From Header	To Sel	To Field	To Header	Join type
07	DPEN	EMPLOYEE-dependent file-not printing	08	PREN	EMPLOYEE NUMBER-empl file-not printg	MATCHED
12	DPER	EMPLOYER	11	PRER	EMPLOYER NUMBER	MATCHED

Selection Criteria

Logical	Sel	Field	Test	Criteria	Column
	06	DPDBH	GT	01/01/1974	

Sorting & Grouping

Sort Order	Ascend / Descend	Sel	Field	Break Lines	Break Text	Print Count	First Match
03	D	06	DPDBH	0			N
02	A	01	PRCOMN	0			N
01	A	02	PRCTY1	2		N	N

********** End of Report **********

The following table explains the contents of each report section.

Section	Description
Identifying header data	Identifies the report definition by name, owner, and title; indicates whether report controls are set for summary output and for storing the output; and indicates when the definition was most recently modified.
Selected Libraries	Lists the name and Infinium QY description for each library selected.
Selected Files	Lists the name and Infinium QY description for each file selected; indicates the primary file by **P** and indicates the order in which the other files were selected by number; lists each file's Infinium QY description, and identifies the library to which each file belongs.
Selected Fields *Sel, Field, Header*	First lists each report column by number under *Sel*, identifies the field selected for that column, and prints the header text defined for that column.
Input	Under *Input*, identifies the starting position and length of each field within the database application file from which Infinium QY derives this field's data.
Output *Library* *File*	Under *Output*, identifies where the field's column begins in the defined report's output measured in character positions, and how many characters the column contains. For numeric fields, also identifies the number of decimals positions defined for the report output. Blank values indicate that the field is not printed on the report. **Note:** A character position is the space alloted to one letter or number. Then identifies the database library and file for each listed field.
Results Columns *Sel* *Result Header* *Column Factor 1* *Numeric* *Operand* *Column Factor 2* *Value* *String* *Start Position* *Length* *Append Column*	For each numeric or string result column, identifies the column number assigned to the result column and the header defined for the result column. Under *Column Factor 1*, identifies the column used as the basis for the result calculation or string manipulation. For result columns defined at the Result Columns screen, identifies the mathematical operator such as the minus sign and either the other column to be used for the calculation or the value completing the calculation. For result columns defined at the Result Strings screen, identifies either the starting position and number of characters to use for a substring result or the column whose values are to be appended to those in the base column.

Section	Description
Format Options *Sel, Field, Justification* *Numeric Flags*	Identifies each column, the field used for the column, and whether the values in that column are to be printed left-justified, right-justified, or centered. Under *Numeric Flags*, indicates the following for each numeric field: The symbol such as **$** or **£** to be used in front the value, if applicable The separation character such as a comma or period to be used between each three digits in the numeric value The comma or period character to be used to set off decimal values Whether to convert the date to standard format, if this is a date field Whether or not to print the total, average, maximum, or minimum for the values in this column
Join Definitions	Identifies each pair of fields used as file joins by column number, field, and column header text, and specifies the join type for each pair.
Selection Criteria	Summarizes each selection test by column number, field name, test such as GT and either the value or the second column used to complete the test. Under *Logical*, identifies the **AND** or **OR** logical operator for each additional test applied, if any, to a single field.
Sorting & Grouping *Sort Order* *Ascend Descend* *Sel, Field* *Break Lines, Text* *Print Count* *First Match*	Identifies the order in which the data in the report output is to be sorted by listing each sort, whether the sort is ascending (such as A to Z or 1 to 9) or descending (such as Z to A or 9 to 1), which report column each sort applies to, and the field selected for that column. If the report definition includes grouping, this section of the Report Details report then specifies how many lines are to inserted between groups, text to be printed at the end of each group, and whether or not to print how many records were found for that group. Finally, this section indicates whether the system is to print for this column for only the first unique combination of values in the preceding columns (the first match). Refer to the Defining Sort and Group Options section in Part 4 of this guide for details about the Infinium QY *First Match* field.

Downloading A Report to a PC

Generating the Appropriate Output File

If planning to download a Infinium QY report to a PC by using the IBM PC Support/400 tool, ensure that you generate the output file in one of the two PC-compatible formats by specifying PC option **5** (formatted file) or **6** (data only file) at the Batch Run screen. Refer to the Running a Batch Report section earlier in Part 5 of this guide for details.

If planning to use Infinium DeskLink, ensure that you generate the output file in the appropriate format by specifying Infinium DeskLink at the Batch Run screen. Refer to the Running a Batch Report section earlier in Part 5 of this guide for details.

The following pages explain how to use PC Support/400 to download your report output. For information about using Infinium DeskLink, refer to the *Guide to Infinium DeskLink*.

Selecting the PC Support/400 Method

There are two ways to use PC Support/400 to download files from the AS/400 to your PC.

- Follow the standard PC Support/400 file transfer procedure. Refer to IBM's PC Support/400 documentation for details.
- Load and use the Infinium QY PC .BAT files and a standardized PC Support/400 transfer request that simplify the transfer for you, as described on the following pages.

Installing the .BAT Files on Your PC

The following .BAT files are included with the Infinium QY product.

Batch File	Purpose
QYTRANS.BAT	Transfers the file to your PC from the AS/400 library member that contains the report
QYFDEL.BAT	Deletes the file from the AS/400 library

The following instructions for installing these .BAT files into your PC's PC Support/400 directory assume familiarity with PC Support/400. Refer to the PC Support/400 documentation for details if necessary.

Note: You do not need to reinstall these .BAT files if they are already present on your PC.

1. Sign on to the AS/400.
2. Start up the PC Support/400 utility.
3. At the PC Support/400 menu, select *Transfer data*.
4. Select *Transfer data from host system to PC*.
5. At the PC Support/400 Transfer screen, press F10 to move to the action bar, highlight *Create* and press Enter.
6. Select *Create a transfer request* and use the following table to fill the fields on the displayed screen:

Field	Action
FROM	Type **`IQY2000/qypsplf(qytrans)`**. **Note:** If you use a different Infinium QY library name than the standard IQY2000, use that name instead of **`IQY2000`**.
Output device	Arrow down to select **`3 Disk`** and press Spacebar to highlight this entry.
To	Type x\y**`\qytrans.bat`**, substituting for x and y the names of your disk drive and the subdirectory on that drive that contains your PC Support/400 software or an alternative drive and subdirectory to which you want to transfer your report. Example: **`c:\pcs\qytrans.bat`**.
PC file type	Select **`1`** for ASCII text format.

7. Press Enter to complete creation of the request and then press F5 to run the transfer request.

   The system transfers QYTRANS to your PC's PC Support/400 directory and stores it in that directory.

8. Repeat steps 5, 6, and 7 for QYFDEL, substituting **QYDEL** for **QYTRANS** in the *FROM* field value.

When you have finished transferring both files, checked your PC directory to ensure the files are present in your PC's PC Support/400 directory, you can download reports to your PC.

Customizing the .BAT Files on Your PC

After installing the .BAT files on your PC, perform the following steps to customize the .BAT files for your environment as follows:

1. Use your preferred PC text editor such as MicroSoft Word or Word Perfect to open QYTRANS.BAT.
2. Search for the following line in the .BAT file:

   ```
   rmtcmd rmvm file(%1/QYPSPLF) mbr(%1)
   ```

   In the preceding line, substitute for the **%1** in the **(%1/QYPSPLF)** string the name of your Infinium QY library. Example: If your site uses the standard IQY2000 name for the Infinium QY product library, change the line to the following:

   ```
   rmtcmd rmvm file(IQY2000/QYPSPLF) mbr(%1)
   ```
3. Save the edited file.
4. Repeat customization of this same line in QYFDEL.

Creating the Required Transfer Request

In order to use the .BAT files for easy transfer, you must have a standardized PC Support/400 transfer request setup in PC Support/400. Set up a separate transfer request for each report you plan to transfer.

Once you have set up the transfer request, you can use the same request repeatedly for that report. This is a one-time setup task for each report.

Perform the following steps to set up this request:

1. Sign on to the AS/400.
2. Start up the PC Support/400 utility.
3. At the PC Support/400 menu, select *Transfer data*.
4. Select *Transfer data from host system to PC*.

5. At the PC Support/400 Transfer screen, press F10 to move to the action bar, highlight *Create* and press Enter.

6. Select *Create a transfer request* and use the following table to fill the fields on the displayed screen:

Field	Action
FROM	Type **IQY2000/qypsplf(**name_of_report**)**. **Note:** Substitute the name of the report you plan to transfer, such as EMPLDEP, for name_of_report in the preceding string.
Output device	Arrow down to select **3 Disk** and press Spacebar to highlight this entry.
To	Type x\y\name_of_report, substituting for x and y the names of your disk drive and the subdirectory on that drive that contains your PC Support/400 software, and substituting the name of the report, such as EMPLDEP, for name_of_report. Example: **c:\pcs\empldep**.
PC file type	Select **1** for ASCII text format.
Replace old file	Specify yes or no, depending on whether you want each newly transferred report to overwrite the previously transferred file.

7. Press F10 to move to the action bar at the top of the screen and select *Save*. This saves your request for future use.

8. Exit from PC Support/400.

Transferring an Infinium QY PC-Format Output File to Your PC

As indicated at the beginning of this section, you can use either of the following methods to transfer report output to your PC:

- Follow the standard PC Support/400 procedure to create a new transfer request and download the output each time you run a report
- Use the simpler procedure provided by the Infinium QY .BAT files described earlier in this section

To use the standard PC Support/400 procedure each time, refer to the PC Support/400 documentation from IBM. Perform the steps beginning later on this page to use the simpler procedure. The procedure requires

that you have already performed the following setup tasks described earlier in this section:

- Set up the .BAT files on your PC
- Set up the PC Support/400 transfer request for the report, specifying the report's name, such as EMPLDEP; the name of the report output is the same as the name of the report definition you used to generate the output
- Generate report output in PC-file format by specifying option **5** or **6** at the Infinium QY Batch Run screen

Once setup is complete, perform the following steps each time you want to transfer the output for this report:

1. Use your usual method to access the PC C:\ prompt and go to the PC's C:\PCS directory where you saved the QYTRANS.BAT and QYFDEL.BAT files.

   Note: If you saved the .BAT files to a different location by typing an alternative value in the *To* field described on page 5-36, go to that different location instead of to C:\PCS.

2. Type the following command and press Enter to transfer the report from the AS/400 to your PC:

   `c:\pcs\qytrans` name_of_report_such_as_empldep

   Note: If you are using a drive and directory other than C:\PCS, substitute the appropriate drive and directory value in the command.

3. Enter the following command and press Enter to delete the report from the AS/400, substituting an alternative drive and directory if applicable:

   `c:\pcs\qyfdel` name_of_report_such_as_empldep

When you perform the preceding steps, your PC uses the .BAT files to do the following:

1. Finds the PC Support/400 transfer request you set up for the report
2. Transfers the report to your PC's C:\PCS directory or your equivalent drive and directory
3. Deletes the AS/400 copy of the report output

Releasing System Function Locks

System Function Locking

Infinium QY uses system locking to prevent concurrent updates and data overrides by multiple users or workstation sessions. For example:

- If two users at your site try to modify a particular report definition at the same time, the system displays a message to the second user that the report is currently in use.
- If two users try to use the same administrative function, the system displays a message to the second user that the administrative function lock is held by another user.
- If one workstation session performs a create, modify, or interactive generation task, the system ensures that any second session at that same workstation does not perform any of these tasks.

Ordinarily, the system automatically releases locks when the first user exits from the function. Events such as power failures can interrupt this process.

Caution: If possible, identify the cause of the lock and ensure that releasing the lock is appropriate before using the *Release System Locks* function. For example, ensure that the original user has finished updating a report definition before removing the lock on that definition.

Perform the following steps to release a lock:

1. At the Infinium QY main menu select *Utilities*.
2. Select *Release System Locks*.

   The system displays the Release System Locks screen.

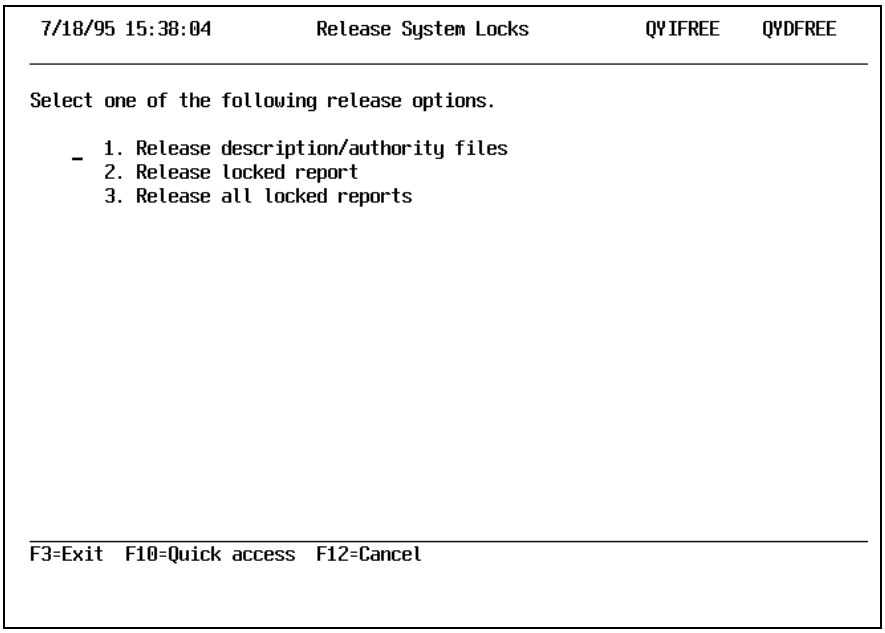


Figure 5-10: The Release System Locks screen

3. Type one of the following at the Release System Locks screen, depending on the condition you are experiencing.

Value	Explanation
1	Type this value if the Administrative Functions are locked due to device, program session, or power supply failure.
2	Type this value if the system lock remains due to a device, program session, or power failure while a particular report was being accessed.
3	Type this value if many reports are locked due to a power failure on the AS/400.

4. Press Enter. If you typed **1** or **3**, the system displays a message that the lock has been released. Go to step 5.

   If you typed **2**, the system displays the Release Locked Report screen. Type the name of the locked report definition in the *Report name* field and press Enter. The system displays a message that the lock has been released. Press F3 to return to the Release System Locks screen.

5. Press F3 to return to the *Utilities* menu.

Converting a QueryCalc Report

The Infinium QY *Convert to QueryCalc* function lets you convert QueryCalc report definitions to Infinium QY report definitions. This is a one-time conversion process for customers who are first implementing Infinium QY after using QueryCalc.

Preparing to Convert a Report Definition to Infinium QY

Perform the following steps before beginning the conversion:

1. Review all your QueryCalc report definitions. Delete outdated report definitions from QueryCalc.
2. Ensure that all the remaining QueryCalc definitions have names beginning with an alphabetic character. Rename any definitions that start with a number before trying to perform the conversion.
3. Identify the common fields used to connect files. After conversion, you may need to specify the file joins in Infinium QY. Having notes on the fields to use can make the joining task easier.
4. Identify QueryCalc report definitions that use dates in selection tests. The conversion process converts dates as numeric fields with four decimal positions. These fields require post-conversion clean-up.
5. Check security levels and restrictions.

   Review the security levels of the libraries, files, and fields in your QueryCalc report definitions prior to converting the report definitions. If the security levels in Infinium QY differ from those in QueryCalc, the report definition owner may not have access to the converted report.

Converting QueryCalc Report Definitions

Perform the following steps to convert one or more QueryCalc report definitions to a Infinium QY report definition:

1. At the Infinium QY main menu select *Utilities*.
2. Select *Convert QueryCalc Report*.

   The system displays the Convert QueryCalc Report screen.
3. Type the QueryCalc report name you want to convert to Infinium QY in the *Report name* field, or type **`*ALL`**.
4. Type the database library in which the QueryCalc report definition resides in the *From library* field.
5. Type the number that corresponds with the Infinium application in which the QueryCalc report definition resides.
6. Press Enter.

   The system submits the job to a batch process. The job provides an audit report indicating which reports were converted.
7. Press F12 to return to the *Utilities* menu.

Repeat these steps for each library and application to be converted.

Reviewing the Converted Reports

Although the audit report confirms that the QueryCalc report definitions were succesfully converted to a Infinium QY report definition, you should review the new report definitions prior to executing the report. Perform the following post-conversion tasks:

- Use the Infinium QY Report Detail report to diagnose potential problems with the converted definitions.
- Ensure that multiple files referenced in a single Infinium QY report definition are properly joined through common fields.
- Ensure that each report definition referencing a date for use in a calculation, sorting, or a selection test uses the Hundred Year Format version of the date field.

Hands-On Workshop

In this workshop, you generate the reports you defined in previous workshops.

Exercise 5-1 Display Report Output

1. At the Infinium QY main menu select *Report Generation*.
2. Select *Display Stored Output*.

Perform on-line display of the reports you created in Exercise 4-2.

Exercise 5-2 Print a Report

1. At the Infinium QY main menu select *Report Generation*.
2. Select *Batch Run*.

   Note: If you have already generated stored output for your reports, you can select *Print Output* instead of *Batch Run* at the *Report Generation* menu.
3. Generate, if necessary, and print copies of the reports you created in Exercise 3-2.

Exercise 5-3 Delete Report Output

1. At the Report Maintenance menu select Directory.
2. Generate a directory of stored reports and delete the ouput for one of the reports you generated.

Exercise 5-4 Print a Report Detail Report

1. Select *Reports* at the *Utilities* menu.
2. Generate a Report Detail report for a report definition you created.

   The following pages provide a general Infinium QY Review Exercise.

Infinium QY Review Exercise

1. ___ Where is the most efficient place to start when creating a new Infinium QY report definition?

A. Using the Infinium QY *Create/copy* function

B. Laying out the report on the Design Plan Worksheet

C. Using the *Interactive Query* function to run/modify a definition

2. ____ To be joined, two files must have

A. At least one field in common

B. The same number of fields

C. The same number of records

D. All of the above

E. None of the above

3. ____ When defining selection criteria for alphanumeric data,

A. You can type the values in either upper or lower case such as either EGG or egg to find records regardless of the cases of the letters in the database records.

B. You must type the values exactly as they are entered in the records, using upper case where the data in the database has upper case, and lower case where the data in the record has lowercase.

4. ____ Which date format do you need for performing calculations?

A. Edited (such as 01/01/1995)

B. Unedited (such as 01011995)

C. Hundred Year Format (such as 34699)

D. Any of the above

E. None of the above

5. _____ When generating a report, Infinium QY reads every record in

A. The primary file

B. Every secondary file

C. All files included in the report definition

6. Match the terms in Column 1 with the definitions in Column 2

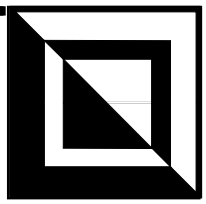
____	Library	a.	Combine field values in result strings
____	File	b.	Any files other than the primary file in a report definition
____	Primary File	c.	For Infinium QY purposes, an alternative term for a database
____	Secondary File	d.	A common field shared by two files
____	Join Field	e.	Detailed description of a report
____	Report Definition	f.	Data resulting from a report definition
____	Report Output	g.	Location of unique data for a report
____	Concatenate	h.	A set of related fields

7. Match the functions in Column 1 with the screen names in Column 2.
Note: The same answer may apply in multiple cases.

____	Join files	a.	Define Selection Criteria
____	Merge column values together (concatenate)	b.	Define Result Columns
____	Change the order of the columns	c.	Column Edit Options window
____	Convert a date	d.	Define Joins and Join Options
____	Total the values in a column	e.	Format Report Columns
		f.	Define Result Strings
		g.	Define Sort and Grouping Options

Notes

Part 6



Appendices

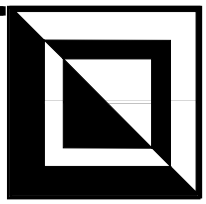
Each product-specific appendix provides the following:

- Summary diagrams identifying the physical files and physical file names you might want to use for Infinium QY report definitions
- One or more sample report design worksheet and output

Topic	Page
Design Plan Worksheet Masters	A-1
Infinium AR Files and Sample Reports	B-1
Infinium OH Files and Sample Reports	C-1
Infinium FA Files and Sample Reports	D-1
Infinium GL Files and Sample Reports	E-1
Infinium HR Files and Sample Reports	F-1
Infinium MM Files and Sample Reports	G-1
Infinium PL Files and Sample Reports	H-1

Notes

Appendix A



Design Plan Worksheet Masters

This appendix contains blank masters for the following Design Plan Worksheets:

- Report Definition Components Design Plan Worksheet (three blank masters for your convenience)

  Use this worksheet for all types of Infinium Query reports.

- Report Library, File, and Field Design Plan Worksheet

  Use this worksheet to consolidate library, file, and field information when the report uses multiple files and fields.

Make copies of the worksheets for use in planning the design of reports before you create their definitions.

For instructions on using these worksheets refer to Part 2 of this guide, "Designing a Report."

Infinium QY Report Components Worksheet (Number 1 of 3)

Report Title:						
	Column __	Column __	Column __	Column __	Column __	Column __
Column Heading						
Field Name						
Libraries						
File						
Derived Column						
Calculations						
Result String						
Format Option						
Selection Criteria						
Group/Sort						
Join Column						

Infinium QY Report Components Worksheet (Number 2 of 3)

Report Title:						
	Column __	Column __	Column __	Column __	Column __	Column __
Column Heading						
Field Name						
Libraries						
File						
Derived Column						
Calculations						
Result String						
Format Option						
Selection Criteria						
Group/Sort						
Join Column						

Infinium QY Report Components Worksheet (Number 3 of 3)

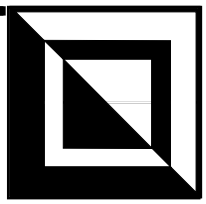
Report Title:						
	Column __	Column __	Column __	Column __	Column __	Column __
Column Heading						
Field Name						
Libraries						
File						
Derived Column						
Calculations						
Result String						
Format Option						
Selection Criteria						
Group/Sort						
Join Column						

Infinium QY Library, File, and Field Consolidation Worksheet

Report Title:		
Library:	Library	Library
Primary File:	Secondary File:	Secondary File: (If Needed)
Fields Needed:	Fields Needed:	Fields Needed:
Join Column:	Join Column:	Join Column:

Notes

Appendix B



Infinium AR Files and Sample Reports

This appendix provides the following for your reference:

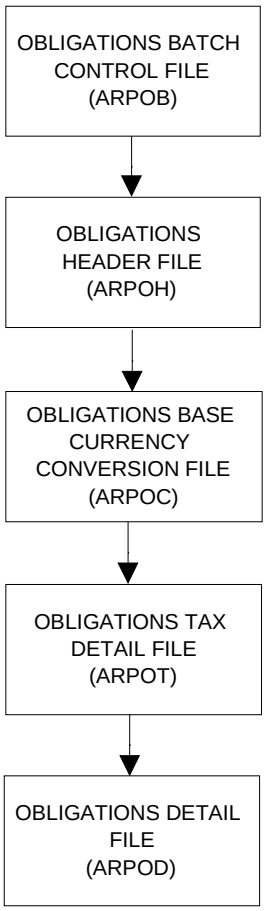
- The names of commonly-used Infinium AR files
- The following sample Infinium QY report worksheets and reports for Infinium AR

Topic	Page
Infinium AR Sample Design 1: Master List of Customers	B-3
Infinium AR Sample Design 2: Customers with Obligations Over 60 Days	B-5

Commonly-Used Infinium AR Files

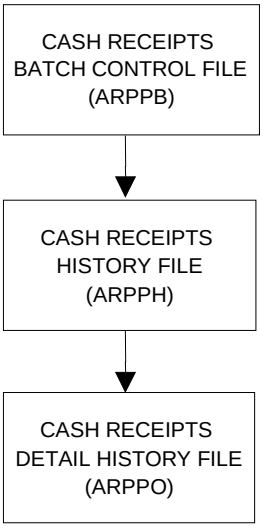
Obligation Processing

Files for Posting Obligation Batches



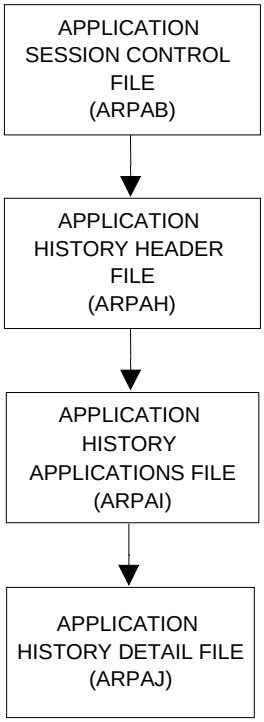
Cash Receipts Processing

Files for Posting Cash Receipt Batches



Applications Processing

Files for Applying Receipts to Obligations



Infinium AR Sample Design 1:
Master List of Customers

Report Title:	*Master List of Customers*					
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Column Heading	*AR Co.*	*Cust #*	*Cust Name*	*City*		
Field Name	*CUCO*	*CUCUNO*	*CUCAME*	*CUCITY*		
Libraries	*TRAINQYAR* →					
File						
Calculations						
Result String						
Format Option						
Selection Criteria						
Group/Sort	*Sort = 1 Group*					
Join Column						

```
QYIREPORT    QYTOUTP       KDAR1               Master List of Customers                                                                                                  Page   1
 7/29/93      9:05:20                                                                                                                                                   QY2000
  AR   Customer        Customer
  Co   Number          Name                            City
=====  ==============  ==============================  ====================
AR001  1000            Customer A                      Hyannis
       2000            Customer B                      Yarmouth
       3000            Customer C                      Provincetown
 Total for AR001 . . :     3
-------------------------------------------------------------------------------------------------------------------------------------------------------------------
AR002  1000            Customer A                      Boston
       2000            Customer B                      Boston
       3000            Customer C                      Boston
       10              Order Management 2000 Customer  Hyannis
 Total for AR002 . . :     4
-------------------------------------------------------------------------------------------------------------------------------------------------------------------
AR200  1000            Customer A                      Boston
       2000            Customer B                      Boston
       3000            Customer C                      Boston
 Total for AR200 . . :     3
-------------------------------------------------------------------------------------------------------------------------------------------------------------------
AR201  1000            Customer A                      Boston
       2000            Customer B                      Boston
       3000            Customer C                      Boston
 Total for AR201 . . :     3
-------------------------------------------------------------------------------------------------------------------------------------------------------------------
AR202  1000            Customer A                      Boston
       2000            Customer B                      Boston
       3000            Customer C                      Boston
 Total for AR202 . . :     3
-------------------------------------------------------------------------------------------------------------------------------------------------------------------
.
-------------------------------------------------------------------------------------------------------------------------------------------------------------------
QYIREPORT    QYTOUTP       KDAR1               Master List of Customers                                                                                                  Page   4
 7/29/93      9:05:20                                                                                                                                                   QY2000
  AR   Customer        Customer
  Co   Number          Name                            City
=====  ==============  ==============================  ====================
AR308  2000            Customer B                      Boston
       3000            Customer C                      Boston
       10              Order Management 2000 Customer  Hyannis
 Total for AR308 . . :     4
-------------------------------------------------------------------------------------------------------------------------------------------------------------------
AR309  1000            Customer A                      Boston
       2000            Customer B                      Boston
       3000            Customer C                      Boston
       10              Order Management 2000 Customer  Hyannis
 Total for AR309 . . :     4
-------------------------------------------------------------------------------------------------------------------------------------------------------------------
AR310  1000            Customer A                      Boston
       2000            Customer B                      Boston
       3000            Customer C                      Boston
       10              Order Management 2000 Customer  Hyannis
 Total for AR310 . . :     4
-------------------------------------------------------------------------------------------------------------------------------------------------------------------
Total records selected in report. . .:    83
                                        **********          End of Report          **********
```

Infinium AR Sample Design 2:
Customers with Obligations Over 60 Days

Report Title:	*Customers with Obligations Over 60 Days*					
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Column Heading	*AR Company*	*Customer Number*	*Customer Name*	*Over 60 (Amt 3)*	*Over 90 (Amt 4)*	*Over 120 (Amt 5)*
Field Name	*TBCO*	*TBCUNO*	*CUNAME*	*TBAMT3 Aging Amt 3*	*TBAMT4 Aging Amt 4*	*TBAMT5 Aging Amt 5*
Libraries	*TRAINQYAR* →					
File	*Aged Trial Balance (Primary File)*	*Aged Trial Balance*	*Customer Master*	*Aged Trial Balance*	*Aged Trial Balance*	*Aged Trial Balance*
Calcu-lations						
Result String						
Format Option						
Selection Criteria						
Group/Sort	*Sort = 1 Group Active*	*Sort - 2*				
Join Column	*Col 9*	*Col 10*				

The Aged Trial Balance File is the primary file.
The customer master file is the secondary file.

Infinium AR Sample Design 2:
Customers with Obligations Over 60 Days (Continued...)

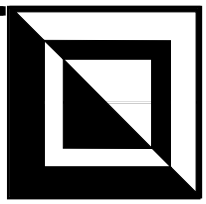
Report Title:	*Customers with Obligations Over 60 Days*					
	Column 7	Column 8	Column 9	Column 10	Column 11	Column 12
Column Heading	*Total Over 60*	*Unapplied Cash*	*AR Company*	*Customer Number*	*Over 60+ Over 90*	
Field Name	*Result*	*TBAMIC Unapplied Amt*	*CUCO*	*CUNO*	*Result*	
Libraries	*TRAINQYAR* →					
File		*Aged Trial Balance*	*Customer Master*	*Customer Master*		
Calcu-lations	*Col 11 + Col 6*				*Col 4 + Col 5*	
Result String						
Format Option			*Do Not Print* →			
Selection Criteria	*GT 0*					
Group/Sort						
Join Column						

```
ORT    QYTOUTP       KDAR2              Customers with Obligations over 60 days                                    Page   1
 7/29/93      9:07:14                                                                                                QY2000
 AR    Cust.                  Amt over         Amt over         Amt over         Total Amt        Unapplied
 Co    No.     Customer Nam  60 days          90 days          120 days          Over 60         Cash
=====  ======  ============  ===============  ===============  ===============  ===============
AR001  3000    Customer C            $0.00       $37609.55           $0.00       $37609.55       $25878.00
-----  ------  ------------  ---------------  ---------------  ---------------  ---------------  ---------------
                                     $0.00       $37609.55           $0.00       $37609.55       $25878.00   Total
 Totals for AR001 . . :     1
-------------------------------------------------------------------------------------------------------------------------------
AR002  1000    Customer A            $0.00        $6900.00           $0.00        $6900.00           $0.00
-----  ------  ------------  ---------------  ---------------  ---------------  ---------------  ---------------
                                     $0.00        $6900.00           $0.00        $6900.00           $0.00   Total
 Totals for AR002 . . :     1
-------------------------------------------------------------------------------------------------------------------------------
AR300  1000    Customer A            $0.00      $114102.19           $0.00      $114102.19           $0.00
       2000    Customer B            $0.00        $5310.00           $0.00        $5310.00        $3000.00
       3000    Customer C            $0.00       $56800.50           $0.00       $56800.50        $5166.00
-----  ------  ------------  ---------------  ---------------  ---------------  ---------------  ---------------
                                     $0.00      $176212.69           $0.00      $176212.69        $8166.00   Total
 Totals for AR300 . . :     3
-------------------------------------------------------------------------------------------------------------------------------
AR301  1000    Customer A            $0.00      $100400.00           $0.00      $100400.00           $0.00
       2000    Customer B            $0.00        $5310.00           $0.00        $5310.00        $3000.00
       3000    Customer C            $0.00       $56800.00           $0.00       $56800.00           $0.00
-----  ------  ------------  ---------------  ---------------  ---------------  ---------------  ---------------
                                     $0.00      $162510.00           $0.00      $162510.00        $3000.00   Total
 Totals for AR301 . . :     3
-------------------------------------------------------------------------------------------------------------------------------
AR302  1000    Customer A            $0.00      $100400.00           $0.00      $100400.00           $0.00
       2000    Customer B            $0.00        $5310.00           $0.00        $5310.00        $3000.00
       3000    Customer C            $0.00       $56800.00           $0.00       $56800.00           $0.00
-----  ------  ------------  ---------------  ---------------  ---------------  ---------------  ---------------
                                     $0.00      $162510.00           $0.00      $162510.00        $3000.00   Total
 Totals for AR302 . . :     3
-------------------------------------------------------------------------------------------------------------------------------
.
.
.
-------------------------------------------------------------------------------------------------------------------------------
AR310  1000    Customer A            $0.00      $100400.00           $0.00      $100400.00           $0.00
       2000    Customer B            $0.00        $5310.00           $0.00        $5310.00        $3000.00
       3000    Customer C            $0.00       $56800.00           $0.00       $56800.00           $0.00
-----  ------  ------------  ---------------  ---------------  ---------------  ---------------  ---------------
                                     $0.00      $162510.00           $0.00      $162510.00        $3000.00   Total
 Totals for AR310 . . :     3
-------------------------------------------------------------------------------------------------------------------------------
-------------------
Final report totals
-------------------
=====  ======  ============  ===============  ===============  ===============  ===============  ===============

                                     $0.00     $1845822.24           $0.00     $1845822.24        $64044.00   Total
```

Notes

Appendix C



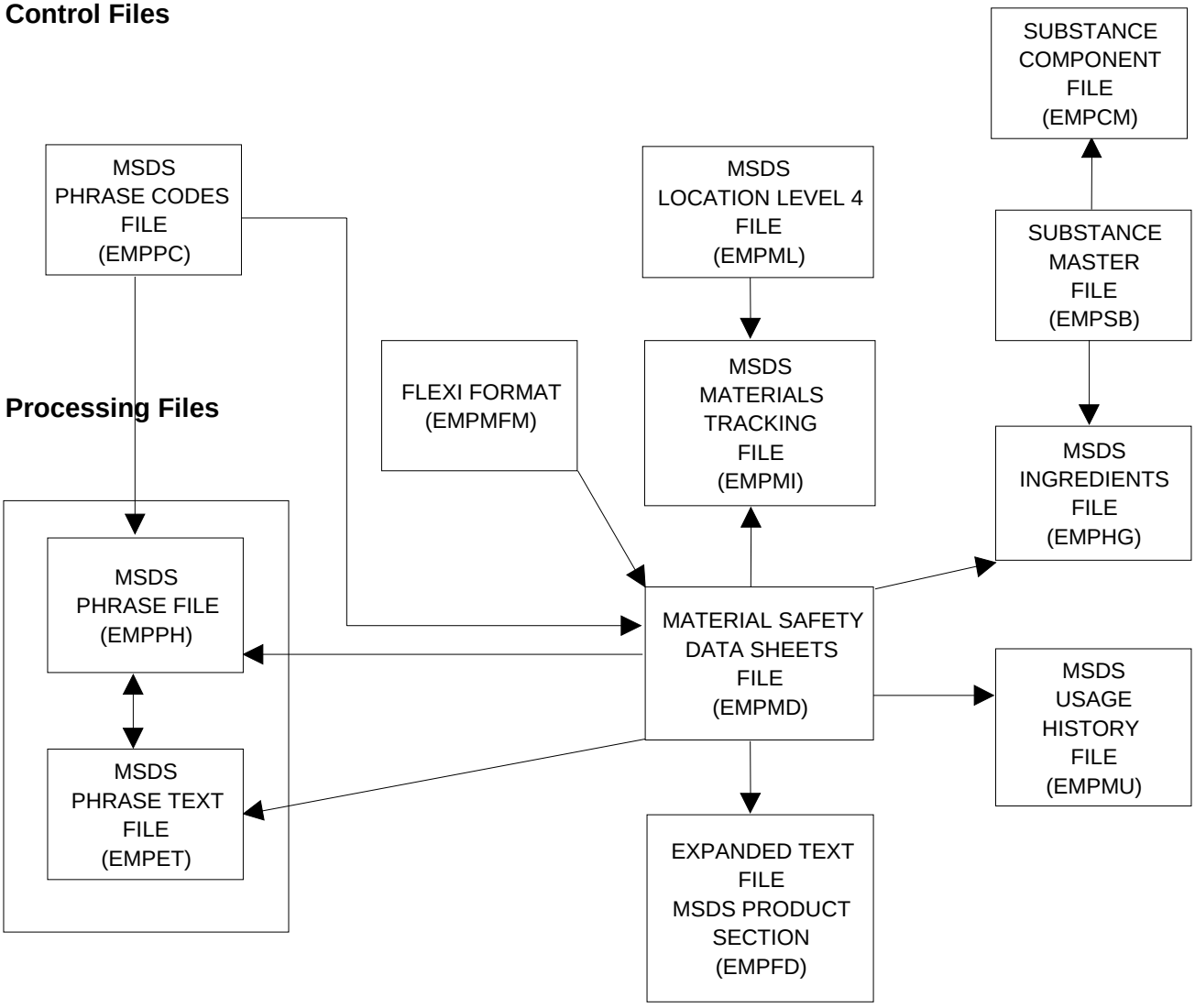
Infinium OH Files and Sample Reports

This appendix provides the following for your reference:

- The names of commonly-used Infinium OH files
- The following sample Infinium QY report worksheets and reports for Infinium OH

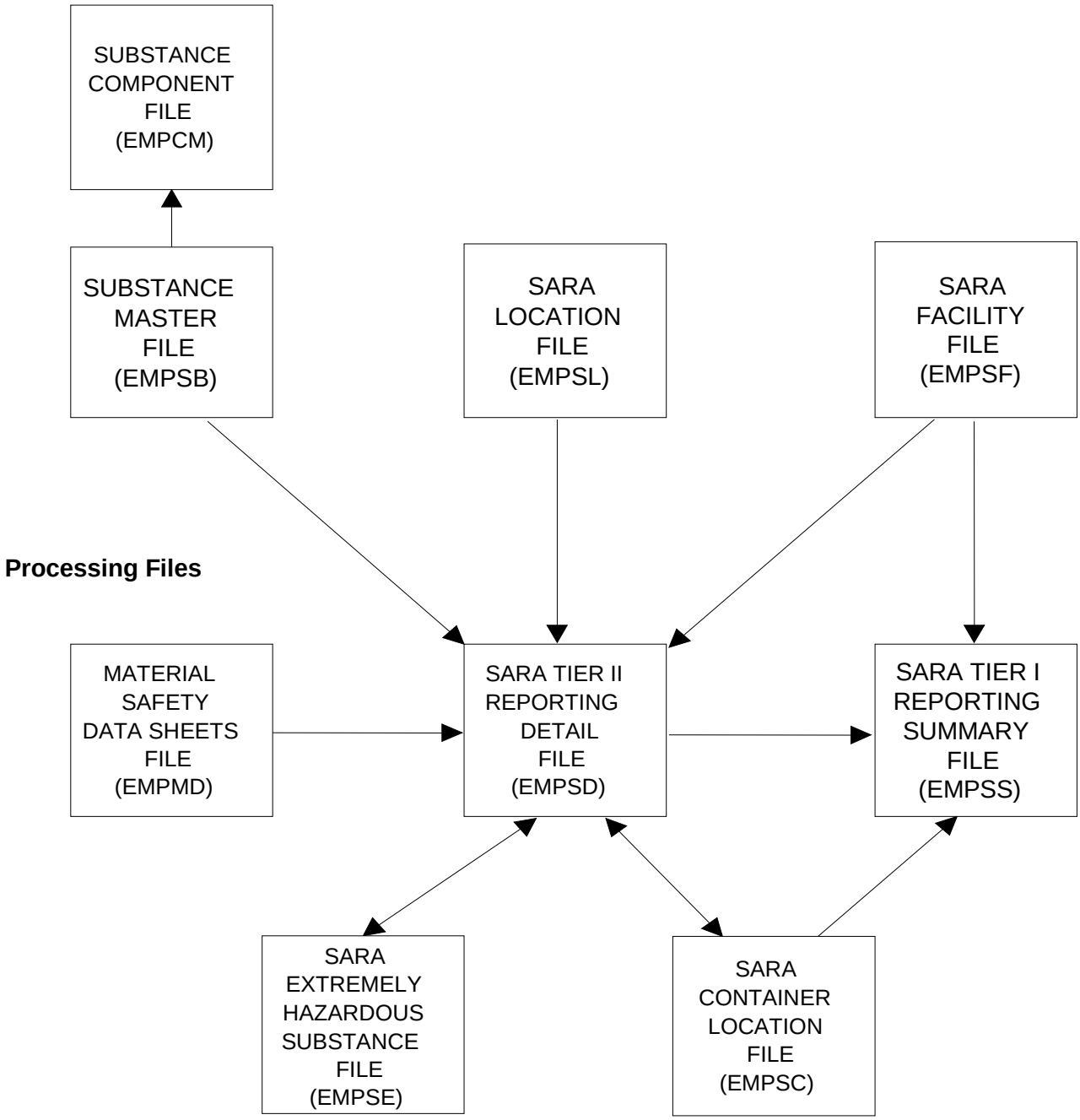
Topic	Page
Infinium OH Sample Design 1: A Listing of All Employees with Date of Hire	C-8
Infinium OH Sample Design 2: OSHA Incidents by Department/Employee	C-10

Infinium OH
Commonly-Used MSDS Management Files



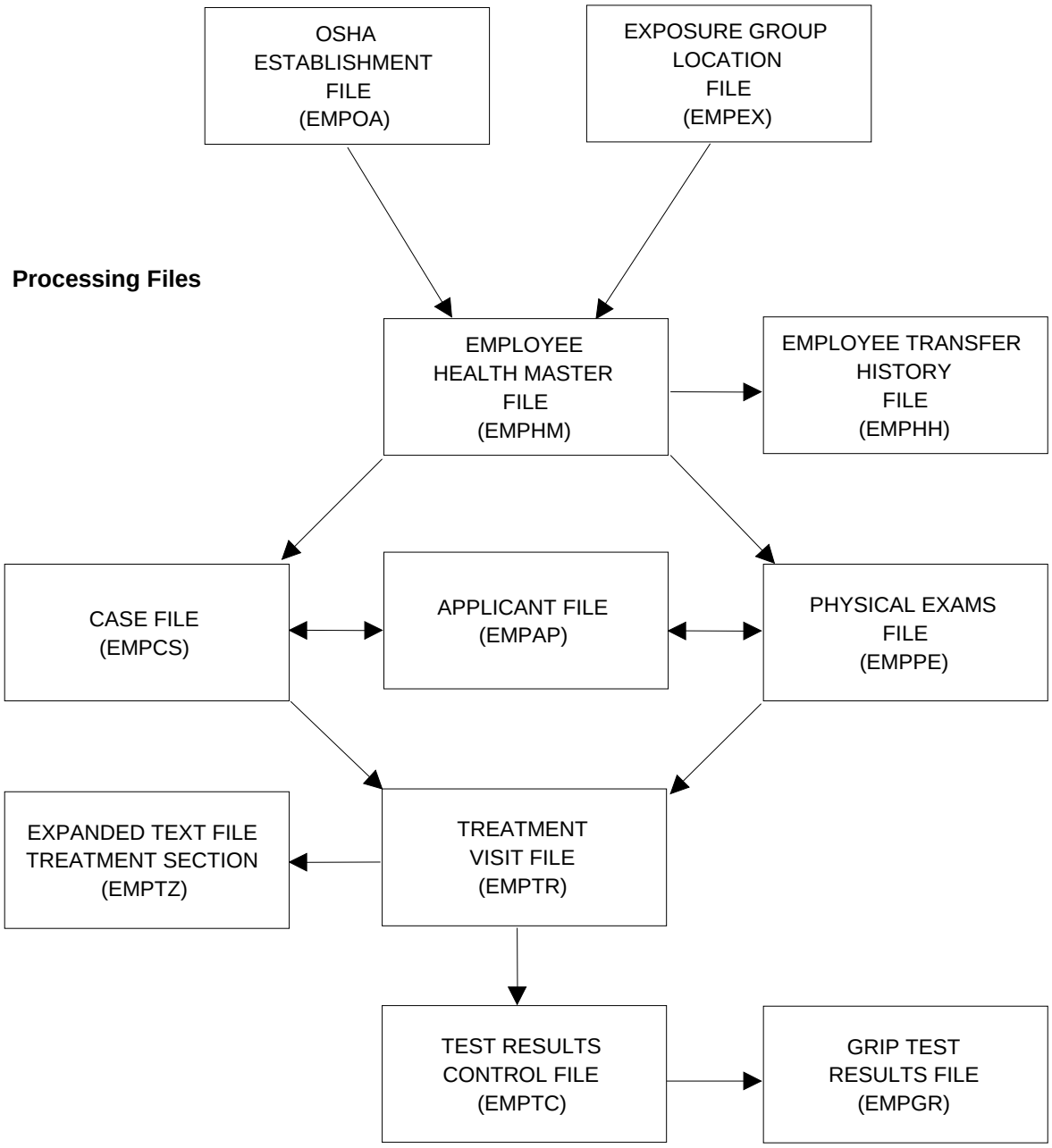
Infinium OH
Commonly-Used SARA Reporting Files

Control Files

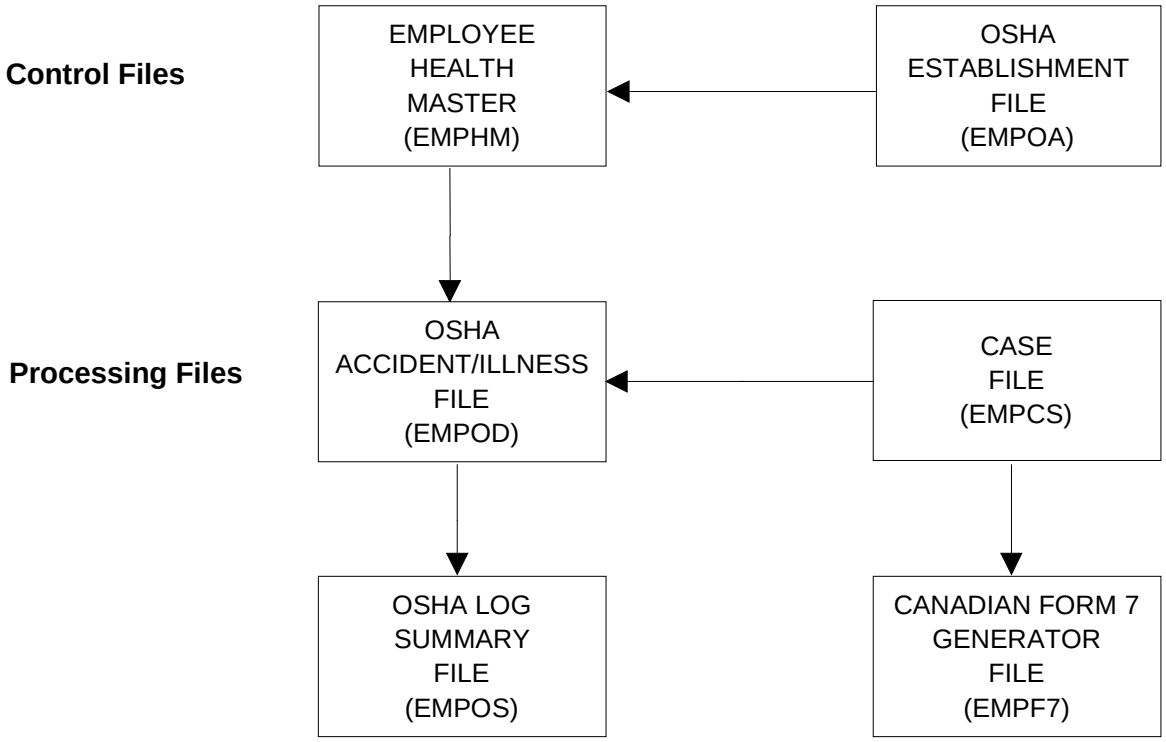


Infinium OH
Commonly-Used Health & Medical Records

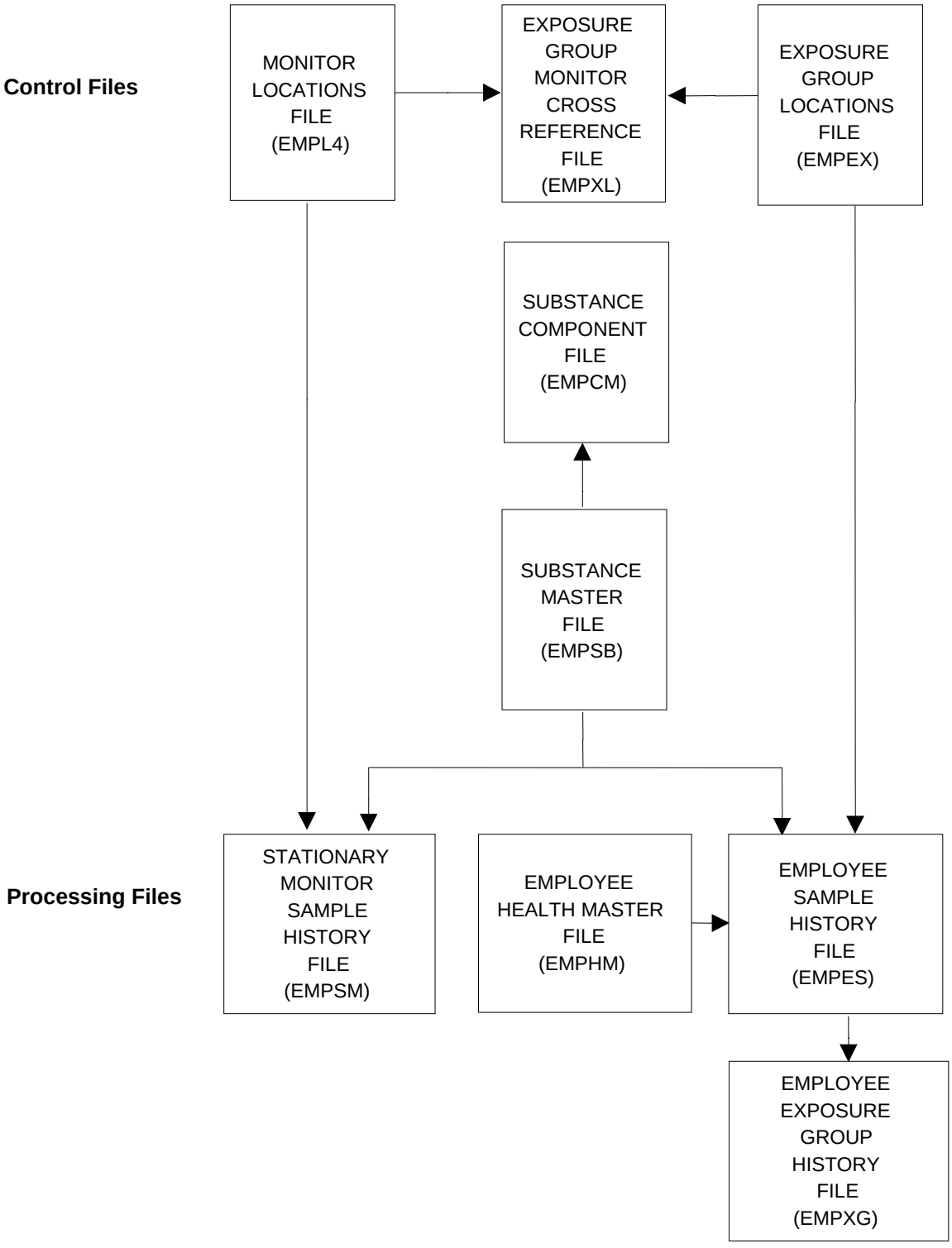
Control Files



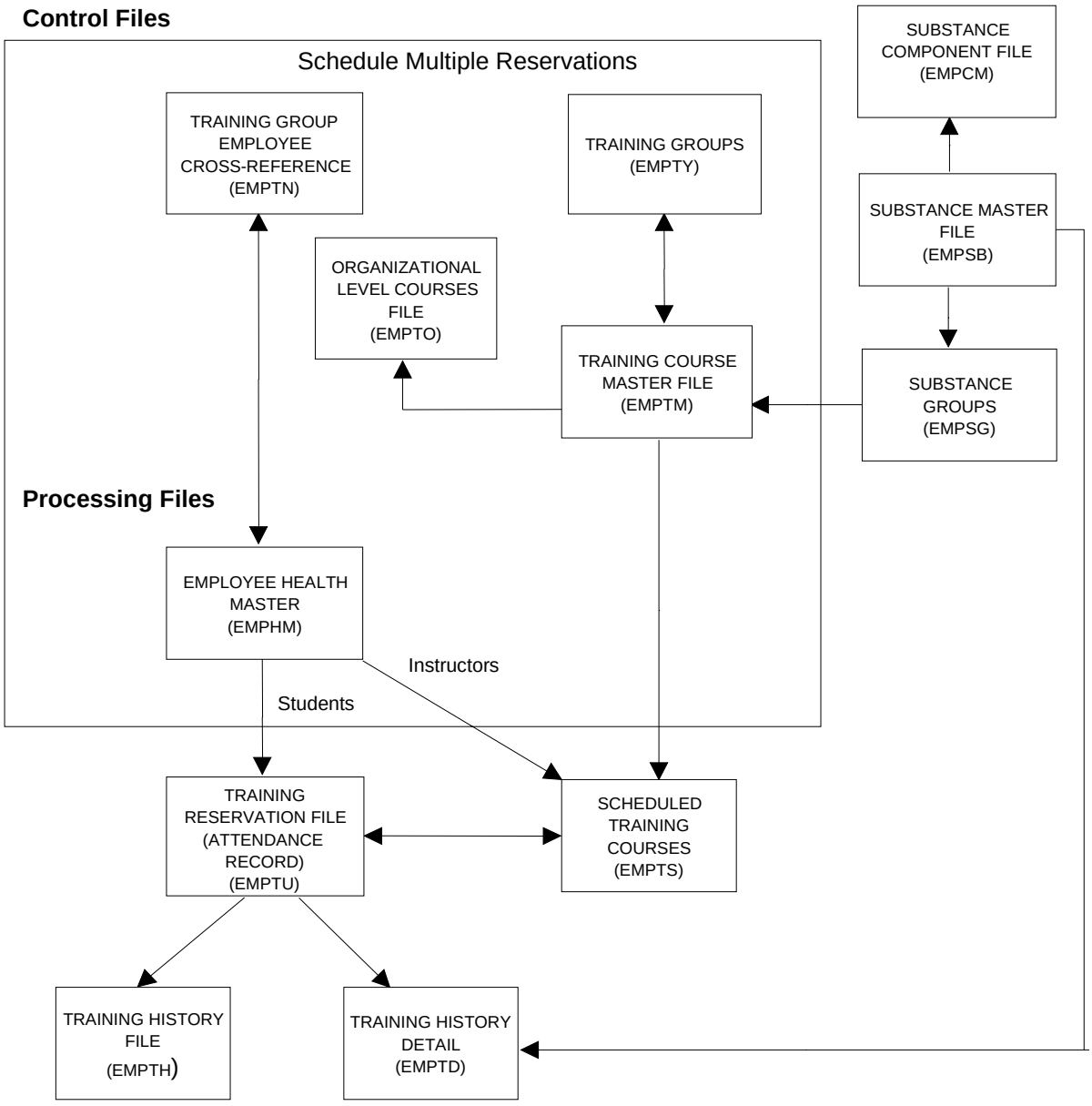
Infinium OH
Commonly-Used Accident/Illness & OSHA Reports Files



Infinium OH
Commonly-Used Industrial Hygiene & Sampling Files



Infinium OH
Commonly-Used Employee Safety Training Files



Infinium OH Sample Design 1:
A Listing of All Employees with Date of Hire

Report Title:	*A Listing of Employees with Date of Hire*					
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Column Heading	*Company*	*Dept.*	*Employee Name*	*EE Number*	*Date of Hire*	
Field Name	*HMCO*	*HMDEPT*	*HMCNM*	*HMEN*	*Date of Hire - Edited HMDOHE*	
Libraries	*TRAINQYEM* →					
File	*Employee Health Master (EMPHM)*					
Calcu-lations						
Result String						
Format Option						
Selection Criteria	*EQ ABC*					
Group/Sort		*Sort = 1* *Group = 1*				
Join Column						

```
QYIREPORT    QYTOUTP       KDEM1           A listing of all employees with date of hire                                  Page   1
 7/29/93      9:08:10                                                                                                   QY2000
                                                EE
Co   Department  Employee                     Number      Hire Date
===  ==========  ========================  =========  ==========
MCM              TOBIN,LESTER                3          1/01/1901
MCM              POTER,SHERMIN               4          2/19/1986
MCM              COOK,FRANCIS                6          1/01/1901
MCM              BRITTON,NANCY               8          7/01/1980
MCM              CROCKER,MARIE               9          11/16/1989
.
MCM              BROWN,BETTY                 45         6/13/1989
MCM              BENNETT,SARAH               47         12/19/1980
MCM              CRAMER,JOHN R               172        1/01/1980
MCM              MARCH,DONALD                123        5/05/1988
MCM              LEVIN,ANITA A               108        2/17/1952
MCM              LAROCHE,MARY                32         6/23/1983
     Total for Department            . . :    21
-------------------------------------------------------------------------------------------------------------------------------
MCM  ASSEMBLY    FOWLETT,KEN                 1          1/01/1983
MCM              ARMSTRONG,ROBERT            7          11/01/1981
MCM              KENNEDY,MARK A              111        4/30/1983
MCM              MARSHALL,DARIN              112        1/01/1990
MCM              JOHN,JOHN                   777        1/01/1956
     Total for Department ASSEMBLY   . . :     5
-------------------------------------------------------------------------------------------------------------------------------
MCM  DOCK        STONE,WALTER                39         4/01/1990
     Total for Department DOCK       . . :     1
-------------------------------------------------------------------------------------------------------------------------------
MCM  FAB         ADAMS,VICTOR                46         1/01/1901
     Total for Department FAB        . . :     1
-------------------------------------------------------------------------------------------------------------------------------
MCM  NEW         DUBUC,GLORIA                25         1/01/1901
     Total for Department NEW        . . :     1
-------------------------------------------------------------------------------------------------------------------------------
MCM  PAINTING    PARKER,DEBORAH              2          2/06/1963
MCM              BETHUNE,EARL                12         12/08/1975
MCM              TREAUDEAU,MADILYN H         173        6/01/1990
QYIREPORT    QYTOUTP       KDEM1           A listing of all employees with date of hire                                  Page   2

 7/29/93      9:08:10                                                                                                   QY2000
                                                EE
Co   Department  Employee                     Number      Hire Date
===  ==========  ========================  =========  ==========
     Total for Department PAINTING   . . :     3
-------------------------------------------------------------------------------------------------------------------------------
MCM  PLTG        WATLOCK,BEN                 5          1/01/1901
     Total for Department PLTG       . . :     1
-------------------------------------------------------------------------------------------------------------------------------
MCM  QA                                      444        1990/09/09
     Total for Department QA         . . :     1
-------------------------------------------------------------------------------------------------------------------------------
-------------------------------------------------------------------------
Total records selected in report. . .:    34
                                         **********          End of Report          **********
```

Infinium OH Sample Design 2:
OSHA Incidents by Department/Employee

Report Title:	*OSHA Incidents by Department/Employee*					
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Column Heading	*Company*	*Inc. Dept.*	*Inc. Date*	*EE Name*	*EE Number*	*Occupation*
Field Name	*ODCO*	*Accident Dept Code ODADPT*	*ODIDTH*	*ODCNM*	*ODEN*	*Occupation 1 HMOCC1*
Libraries	*TRAINQYEM* →					
File	*OSHA Detail (EMPOD)* →					*EMPHM Health Master*
Calcu-lations						
Result String						
Format Option			*HYF Date Conversion*			
Selection Criteria			*GE 02/01/1990*			
Group/Sort	*Sort = 1 Group Active*	*Sort = 21 Group Active Print Counts*	*Sort = 3*	*Sort = 4*	*Sort = 5*	
Join Column	*Col 9*				*Col 10*	

The OSHA Detail File (EMPOD) is the primary file.
The Employee Health Master (EMPHM) is the secondary file.

Infinium OH Sample Design 2:
OSHA Incidents by Department/Employee (Continued...)

Report Title:	*OSHA Incidents by Department/Employee*					
	Column 7	Column 8	Column 9	Column 10	Column 11	Column 12
Column Heading	*Description Inj/Illness*	*OSHA 101 #*	*Company*	*EE Number*	*Date of Hire*	*Risk Factor*
Field Name	*ODDESC*	*Case Number ODLOG1*	*HMCO*	*HMEN*	*HMDOHE*	*Risk Factor 1 (CDT) HMFR1*
Libraries	*TRAINQYEM* →					
File	*EMPOD*	*EMPOD*	*EMPHM Health Master*	*EMPHM Health Master*	*EMPHM Health Master*	*EMPHM Health Master*
Calcu-lations						
Result String						
Format Option			*Do Not Print* →			
Selection Criteria						
Group/Sort						
Join Column						

```
QYIREPORT    QYTOUTP       KDEM2           OSHA Incidents by Department/Employee                                    Page   1
 7/29/93      9:33:03
QY2000
     Accident    Incident                                                                                 OSHA 10  Hire        Risk
Co   Dept. Code   Date       Employee              EE No  Occupation  Desc. Injury/Illness              Case No  Date        Facto
===  ==========  ==========  ====================  =====  ==========  ========================  =======
CCP  SOLVENTS    01/08/1992  SHEARBORNE,DAVID E    1866   HOIST       Injury (Phalanges or foot  92-0001  6/20/1986   SMOKE
                 01/10/1992  HARCOURT,WILLIAM H    3626   PROCESSOR   INHALATION OF SOLVENTS     92-0003  6/10/1985
                 01/30/1992  SHEARBORNE,DAVID E    1866   HOIST       Abrasion (occupational)    92-0002  6/20/1986   SMOKE
     Total for Department SOLVENTS   . . :     3
-------------------------------------------------------------------------------------------------------
 Total for Company CCP . . :     3
-------------------------------------------------------------------------------------------------------
MCM              03/03/1990  CARUSO,ALICE          2      CRSH        HAYFEVER                   90-0002  2/06/1963
                 09/09/1990  ARMSTRONG,ROBERT      7      CHEM        Chondromalacia Patella     90-0001  11/01/1981  ARTH
                 09/09/1990  ARMSTRONG,ROBERT      7      CHEM        Chondromalacia Patella     90-0003  11/01/1981  ARTH
                 09/09/1990  ARMSTRONG,ROBERT      7      CHEM        Chondromalacia Patella     90-0004  11/01/1981  ARTH
                 09/09/1990  ARMSTRONG,ROBERT      7      CHEM        Chondromalacia Patella     90-0003  11/01/1981  ARTH
                 09/09/1990  ARMSTRONG,ROBERT      7      CHEM        Chondromalacia Patella     90-0006  11/01/1981  ARTH
                 11/01/1990  TREAUDEAU,MARY        173    CHEM1       CHEMICAL BURN              90-0003  6/01/1990
                 12/05/1990  TREAUDEAU,MARY        173    CHEM1       SLIPPED                    90-0002  6/01/1990
                 12/10/1990  PALMER,RUTH           10     CHEM2       NAUSIOUS FUMES             90-0010  10/03/1985  WGHTL
                 12/11/1990  COOK,FRANCIS          6      CHEM        GRIP TEST BASE CASE        90-0001  1/01/1901
                 12/12/1990  ANDREWS,JOHN          13     DRIVE       Lumbosacral Sprain/Strain  90-0008  1/01/1901
                 12/12/1990  CROCKER,MARIE         9      CHEM1       Lumbosacral Sprain/Strain  90-0001  11/16/1989
     Total for Department            . . :    12
-------------------------------------------------------------------------------------------------------
     ASSEMBLY    11/11/1990  FOWLETT,KEN           1      ASFAN       Fracture - Finger          90-0001  1/01/1983   TRAMA
                 11/11/1990  PALMER,RUTH           10     CHEM2       Abrasion - Occupational    90-0013  10/03/1985  WGHTL
                 11/30/1990  FOWLETT,KEN           1      ASFAN       Twisted Ankle              90-0011  1/01/1983   TRAMA
                 12/03/1990  CARUSO,ALICE          2      CRSH        test5/2                    90-0001  2/06/1963
                 12/10/1990  FOWLETT,KEN           1      ASFAN       nausea                     90-0001  1/01/1983   TRAMA
                 12/11/1990  FOWLETT,KEN           1      ASFAN       BLOW TO THE HEAD           90-0007  1/01/1983   TRAMA
                 12/12/1990  ARMSTRONG,ROBERT      7      CHEM        Otitis Media               90-0004  11/01/1981  ARTH
                 12/12/1990  PALMER,RUTH           10     CHEM2       illness                    90-0004  10/03/1985  WGHTL
                 12/12/1990  SHERRY,LEONARD        11     CHEM3       Gastroenteritis            90-0009  12/12/1986
                 12/16/1990  ARMSTRONG,ROBERT      7      CHEM        Abrasion - Occupational    90-0010  11/01/1981  ARTH
                 12/18/1990  ARMSTRONG,ROBERT      7      CHEM        Wound Upperarm             90-0009  11/01/1981  ARTH
                 12/24/1990  ARMSTRONG,ROBERT      7      CHEM        Dermatitis                 90-0005  11/01/1981  ARTH
                 08/09/1991  CHAPMAN,DIANE         34     PACK        Twisted ankle              91-0002  12/01/1984
                 08/09/1991  POTER,SHERMIN         4      ASFAN       cut hand                   91-0001  2/19/1986   ARTH
     Total for Department ASSEMBLY   . . :    14
-------------------------------------------------------------------------------------------------------
     EXCAVATION  09/09/1990  ARMSTRONG,ROBERT      7      CHEM        Chondromalacia Patella     90-0002  11/01/1981  ARTH
                 10/05/1990  FOWLETT,KEN           1      ASFAN       broken Foot                90-0004  1/01/1983   TRAMA
                 11/11/1990  FOWLETT,KEN           1      ASFAN       Hypertension               90-0001  1/01/1983   TRAMA
```

Co	Accident Dept. Code	Incident Date	Employee	EE No	Occupation	Desc. Injury/Illness	OSHA 10 Case No	Hire Date	Risk Facto
MCM	EXCAVATION	11/11/1990	FOWLETT,KEN	1	ASFAN	Fracture - Finger	90-0002	1/01/1983	TRAMA
		11/30/1990	FOWLETT,KEN	1	ASFAN	Twisted Ankle	90-0004	1/01/1983	TRAMA
		12/11/1990	FOWLETT,KEN	1	ASFAN	SORE WRIST - STIFFNESS	90-0003	1/01/1983	TRAMA
		12/20/1990	FOWLETT,KEN	1	ASFAN	BROKEN LEG	90-0005	1/01/1983	TRAMA
	Total for Department EXCAVATION . . :		7						
	FAB	12/11/1991	MARKS,TONY	42	PICK	X	91-0001	9/16/1989	
	Total for Department FAB . . :		1						
	INFIRMARY	11/30/1990	BRITTON,NANCY	8	CHEM	Otitis Media	90-0005	7/01/1980	
	Total for Department INFIRMARY . . :		1						
	LABORATORY	11/30/1990	BRITTON,NANCY	8	CHEM	Otitis Media	90-0007	7/01/1980	
		12/11/1990	BRITTON,NANCY	8	CHEM	Otitis Media	90-0008	7/01/1980	
	Total for Department LABORATORY . . :		2						
	NEW	11/11/1990	PALMER,RUTH	10	CHEM2	Twisted Ankle	90-0006	10/03/1985	WGHTL
	Total for Department NEW . . :		1						
	PAINTING	10/10/1990	BETHUNE,EARL	12	CRSH	Inhalation of toxic fumes	90-0002	12/08/1975	BCP
		11/01/1990	TREAUDEAU,MARY	173	CHEM1	CHEMICAL BURN	90-0001	6/01/1990	
		12/03/1990	CARUSO,ALICE	2	CRSH	test5/2	90-0002	2/06/1963	
		12/03/1990	CARUSO,ALICE	2	CRSH	Hayfever	90-0012	2/06/1963	
	Total for Department PAINTING . . :		4						
Total for Company MCM . . :			42						
MFG	PAINTING	10/20/1990	JOHNSON,SARAH O	36	TECHS	DEEP CUT ON RIGHT FOREFIN	90-0001	1/01/1989	HYSTR
	Total for Department PAINTING . . :		1						

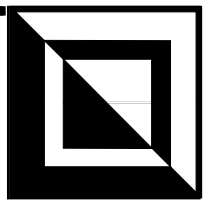
Co	Accident Dept. Code	Incident Date	Employee	EE No	Occupation	Desc. Injury/Illness	OSHA 10 Case No	Hire Date	Risk Facto
Total for Company MFG . . :			1						

Total records selected in report. . .: 46

********** End of Report **********

Notes

Appendix D



Infinium FA Files and Sample Reports

This appendix provides the following for your reference:

- The names of commonly-used Infinium FA files
- The following sample Infinium QY report worksheets and reports for Infinium FA

Topic	Page
Infinium FA Sample Design 1: Assets Including Their Purchase Price	D-3
Infinium FA Sample Design 2: Corporate Book - Net Book Value Report	D-5

Commonly-Used Infinium FA Files

ASSET BASE SEGMENT
also called
ROOT MASTER
(FAPAB)

ASSET TEXT
SEGMENT
(FAPAX)

ASSET USER
FIELDS
(FAPAU)

ASSET CORPORATE
BOOK SEGMENT
(FAPAK)

- RETIREMENTS
- (FAPAR)

ASSET TAX BOOK
SEGMENT (FAPAF)

MAINTENANCE
(FAPAM)

INSURANCE
(FAPAI)

CONSTRUCTION IN
PROGRESS
(FAPAY)

Infinium FA Sample Design 1:
Assets Including Their Purchase Price

Report Title:	*Assets Including Their Purchase Price*					
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Column Heading	*Company*	*Asset Number Primary*	*Asset Description*	*Purchase Price*	*Asset Activity Flag*	
Field Name	*ABCO*	*ABASSU*	*ABDESC*	*ABBAS*	*ABAFLG*	
Library	*TRAINQYFA* →					
File	*Asset Root Master (FAPAB)* →					
Calcu-lations						
Result String						
Format Option					*Do not print*	
Selection Criteria					*EQ blank*	
Group/Sort	*Sort = 1 Group Active*					
Join Column						

```
QYIREPORT    QYTOUTP       KDFA1            Assets including their Purchase Price                                    Page   1
 7/29/93      9:10:36                                                                                                QY2000
     ASSET NUMBER                                          Purchase
Co.  (Primary)      ASSET DESCRIPTION                      Price
===  =============  ============================  =================
001  10021          IRVINE SITE LAND                    1500000.00
001  10022          IRVINE STORE BUILDING                500000.00
001  10023          TYPEWRITER                              500.00
001  10024          TYPEWRITER                              500.00
001  10025          TYPEWRITER                              500.00
001  10026          TYPEWRITER                              500.00
001  10027          TYPEWRITER                              500.00
001  10028          ADDING MACHINES                         550.00
001  10029          ADDING MACHINES                         550.00
001  10030          ADDING MACHINES                         550.00
001  10031          ADDING MACHINES                         550.00
001  10032          DESK                                    500.00
001  10033          DESK                                    500.00
001  10034          DESK                                    500.00
001  10035          OFFICE CHAIRS                           450.00
001  10036          OFFICE CHAIRS                           450.00
001  10036          MISC OFFICE CHAIRS                     1200.00
001  10037          CREDENZAS                              1500.00
001  10038          CREDENZAS                              1500.00
001  10038          OFFICE COUCHES                         1800.00
001  10039          CREDENZAS                              1500.00
001  10039          CUBE PANELS FULL                       2000.00
001  10040          CUBE PANELS FULL                       2000.00
001  10040          CUBE PANELS HALF                       2000.00
001  10041          CUBE PANELS FULL                       2000.00
001  10041          CUBE PANELS CLEAR                      2000.00
001  10042          SALES DATA/ACCUMULATOR                 2500.00
001  10043          SALES DATA/ACCUMULATOR                 2500.00
001  10043          SALES DATA/INPUT                       1000.00
001  10044          SALES DATA/INPUT                       1000.00
001  10045          SALES DATA/INPUT                       1000.00
001  10046          DISPLAY SHELVES                        2400.00
001  10047          SYS38 COMPUTER                            0.00
001  10047          SYS38 COMPUTER                       115000.00
.
.
.


102  6              TAYLOR FREEZER                        10100.00
102  7              TAYLOR FREEZER                        10100.00
102  8              TAYLOR FREEZER                        10100.00
102  9              TAYLOR FREEZER                        10100.00
102  10             TAYLOR FREEZER                        10100.00
001  10127          JELD-WEN                              10000.00
002  14             TABLE PROBLEM                       1000000.00
002  14             TABLE PROBLEM                       1000000.00
002  15             RSTL                                   7136.00
002  15             RSTL                                  10000.00
-------------------------------------------------------------------------------
Total records selected in report. . .:   167
                                         **********          End of Report          **********
```

Infinium FA Sample Design 2:
Corporate Book - Net Book Value Report

Report Title:	*Corporate Book - Net Book Value Report*					
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Column Heading	*Company*	*Asset Number Primary*	*Asset Description*	*Install Date*	*Cost Basis*	*Accum. Reserve*
Field Name	*ABCO*	*ABASSU*	*ABDESC*	*Corp Install Date HYF AKISTH*	*AKBAS*	*AKCAR*
Library	*TRAINQYFA* →					
File	*Root Master (FAPAB) (Primary)*	*Root Master (FAPAB)*		*Corporate Book (FAPAK)*	*Corporate Book (FAPAK)*	*Corporate Book (FAPAK)*
Calcu-lations						
Result String						
Format Option				*Date Conv*	*Totals*	*Totals*
Selection Criteria						
Group/Sort	*Sort = 1 Group = Active*					
Join Column						

Note: Root Master is an alternative name for the Asset Base Segment (FAPAB) file.

Infinium FA Sample Design 2:
Corporate Book - Net Book Value Report (Continued...)

Report Title:	*Corporate Book - Net Book Value Report*					
	Column 7	Column 8	Column 9	Column 10	Column 11	Column 12
Column Heading	*Net Book Value*	*Internal Asset Number*	*Asset Activity Flag*	*Internal Asset Number*	*Activity Flag*	
Field Name	*Result Column*	*ABASSN*	*ABAFLG*	*AKASSN*	*AKAFLG*	
Library	*TRAINQYFA* →					
File		*Root Master (FAPAB)*	*Root Master (FAPAB)*	*Corporate Book (FAPAK)*	*Corporate Book (FAPAK)*	
Calcu-lations	*Col 5 - Col 6*					
Result String						
Format Option	*Totals*	*Do Not Print* →				
Selection Criteria			*EQ = Blank*		*EQ = Blank*	
Group/Sort						
Join Column		*10*	*11 (optional)*			

Note: Root Master is an alternative name for the Asset Base Segment (FAPAB) file.

QYIREPORT QYTOUTP KDFA2 Corporate Book - Net Book Value Report Page 1
7/29/93 9:34:10 QY2000

Co.	ASSET NUMBER (Primary)	ASSET DESCRIPTION	Install Date	Cost Basis	Accum. Reserve	Net Book Value
001	10022	IRVINE STORE BUILDING	01/01/1970	$500,000.00	$62,500.00	$437,500.00
	10023	TYPEWRITER	01/01/1970	$500.00	$0.00	$500.00
	10024	TYPEWRITER	01/01/1970	$500.00	$0.00	$500.00
	10025	TYPEWRITER	01/01/1970	$500.00	$0.00	$500.00
	10026	TYPEWRITER	01/01/1970	$500.00	$0.00	$500.00
	10027	TYPEWRITER	01/01/1970	$500.00	$0.00	$500.00
	10028	ADDING MACHINES	01/01/1970	$550.00	$0.00	$550.00
	10029	ADDING MACHINES	01/01/1970	$550.00	$0.00	$550.00
	10030	ADDING MACHINES	01/01/1970	$550.00	$0.00	$550.00
	10032	DESK	01/01/1974	$500.00	$50.00	$450.00
	10033	DESK	01/01/1974	$500.00	$50.00	$450.00
	10034	DESK	01/01/1974	$500.00	$50.00	$450.00
	10035	OFFICE CHAIRS	01/01/1974	$450.00	$45.00	$405.00
	10036	MISC OFFICE CHAIRS	01/01/1974	$450.00	$45.00	$405.00
	10037	CREDENZAS	01/01/1974	$1,500.00	$150.00	$1,350.00
	10038	OFFICE COUCHES	01/01/1974	$1,500.00	$150.00	$1,350.00
	10039	CUBE PANELS FULL	01/01/1974	$2,000.00	$200.00	$1,800.00
	10040	CUBE PANELS HALF	01/01/1974	$2,000.00	$200.00	$1,800.00
	10041	CUBE PANELS CLEAR	01/01/1974	$2,000.00	$200.00	$1,800.00
	10042	SALES DATA/ACCUMULATOR	01/01/1974	$2,500.00	$357.14	$2,142.86
	10043	SALES DATA/INPUT	01/01/1974	$1,000.00	$200.00	$800.00
	10044	SALES DATA/INPUT	01/01/1974	$1,000.00	$200.00	$800.00
	10045	SALES DATA/INPUT	01/01/1974	$1,000.00	$200.00	$800.00
	10046	DISPLAY SHELVES	01/01/1974	$2,400.00	$400.00	$2,000.00
	10047	SYS38 COMPUTER	02/01/1975	$115,000.00	$21,083.33	$93,916.67
	10048	MORE MEMORY/DISKS	03/01/1975	$20,000.00	$3,333.33	$16,666.67
	10049	MORE MEMORY/DISKS	03/01/1975	$20,000.00	$3,333.33	$16,666.67
	10050	MORE MEMORY/DISKS	03/01/1975	$20,000.00	$3,333.33	$16,666.67
	10051	IBM PERSONAL COMPUTER	10/10/1975	$3,500.00	$175.00	$3,325.00
	10052	IBM PERSONAL COMPUTER	10/10/1975	$3,500.00	$175.00	$3,325.00
	10053	EPSON PRINTER	11/10/1975	$500.00	$16.67	$483.33
	10054	SALES STATION	01/01/1983	$500.00	$100.00	$400.00
	10055	SALES STATION	01/01/1983	$500.00	$100.00	$400.00
	10056	SALES STATION	01/01/1983	$500.00	$100.00	$400.00
	10057	SALES STATION	01/01/1983	$500.00	$100.00	$400.00
	10059	TYPEWRITTER	01/01/1983	$600.00	$120.00	$480.00
	10060	TYPEWRITTER	01/01/1983	$600.00	$120.00	$480.00

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.

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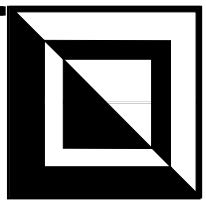
.
QYIREPORT    QYTOUTP       KDFA2              Corporate Book - Net Book Value Report                                    Page   3
 7/29/93      9:34:10                                                                                                  QY2000
     ASSET NUMBER                              Install                        Accum.
Co.   (Primary)     ASSET DESCRIPTION          Date        Cost Basis         Reserve          Net Book Value
===  =============  =========================  ==========  ===============  ===============  ===============
---  -------------  -------------------------  ----------  ---------------  ---------------  ---------------
                                                           $5,873,532.00      $177,270.18    $5,696,261.82   Total
 Totals for Company 001 . . :   104
-------------------------------------------------------------------------------------------------------------------------------
002  15             RSTL                       01/01/1990      $10,000.00           $0.00       $10,000.00
---  -------------  -------------------------  ----------  ---------------  ---------------  ---------------
                                                              $10,000.00           $0.00       $10,000.00   Total
 Totals for Company 002 . . :     1
-------------------------------------------------------------------------------------------------------------------------------
101  6              ACRS PERSONAL              01/01/1985       $1,000.00           $0.00        $1,000.00
     7              ACRS REAL                  01/01/1985       $1,000.00           $0.00        $1,000.00
     8              MACRS PERSONAL PROPERTY    01/01/1988       $1,000.00           $0.00        $1,000.00
     9              MACRS REAL PROPERTY        01/01/1991       $1,000.00           $0.00        $1,000.00
     10             ACRS PERSONAL              01/01/1986       $1,000.00           $0.00        $1,000.00
     11             ACRS PERSONAL              12/01/1986       $1,000.00           $0.00        $1,000.00
     12             ACRS PERSONAL              12/01/1986       $1,000.00           $0.00        $1,000.00
     13             FDL                        01/01/1985      $15,337.44           $0.00       $15,337.44
---  -------------  -------------------------  ----------  ---------------  ---------------  ---------------
                                                              $22,337.44           $0.00       $22,337.44   Total
 Totals for Company 101 . . :     8
-------------------------------------------------------------------------------------------------------------------------------
102  1              TAYLOR FREEZER             01/01/1990      $10,100.00           $0.00       $10,100.00
     2              TAYLOR FREEZER             01/01/1990      $10,100.00           $0.00       $10,100.00
     3              TAYLOR FREEZER             01/01/1990      $10,100.00           $0.00       $10,100.00
     4              TAYLOR FREEZER             01/01/1990      $10,100.00           $0.00       $10,100.00
     5              TAYLOR FREEZER             01/01/1990      $10,100.00           $0.00       $10,100.00

     6              TAYLOR FREEZER             01/01/1990      $10,100.00           $0.00       $10,100.00
     7              TAYLOR FREEZER             01/01/1990      $10,100.00           $0.00       $10,100.00
     8              TAYLOR FREEZER             01/01/1990      $10,100.00           $0.00       $10,100.00
     9              TAYLOR FREEZER             01/01/1990      $10,100.00           $0.00       $10,100.00
     10             TAYLOR FREEZER             01/01/1990      $10,100.00           $0.00       $10,100.00
---  -------------  -------------------------  ----------  ---------------  ---------------  ---------------
                                                             $101,000.00           $0.00      $101,000.00   Total
 Totals for Company 102 . . :    10
-------------------------------------------------------------------------------------------------------------------------------
-------------------
Final report totals
-------------------

===  =============  =========================  ==========  ===============  ===============  ===============
===  =============  =========================  ==========  ===============  ===============  ===============
                                                           $6,006,869.44      $177,270.18    $5,829,599.26   Total
-------------------------------------------------------------------------
Total records selected in report. . .:   123
                                     **********          End of Report          **********
```

Appendix E



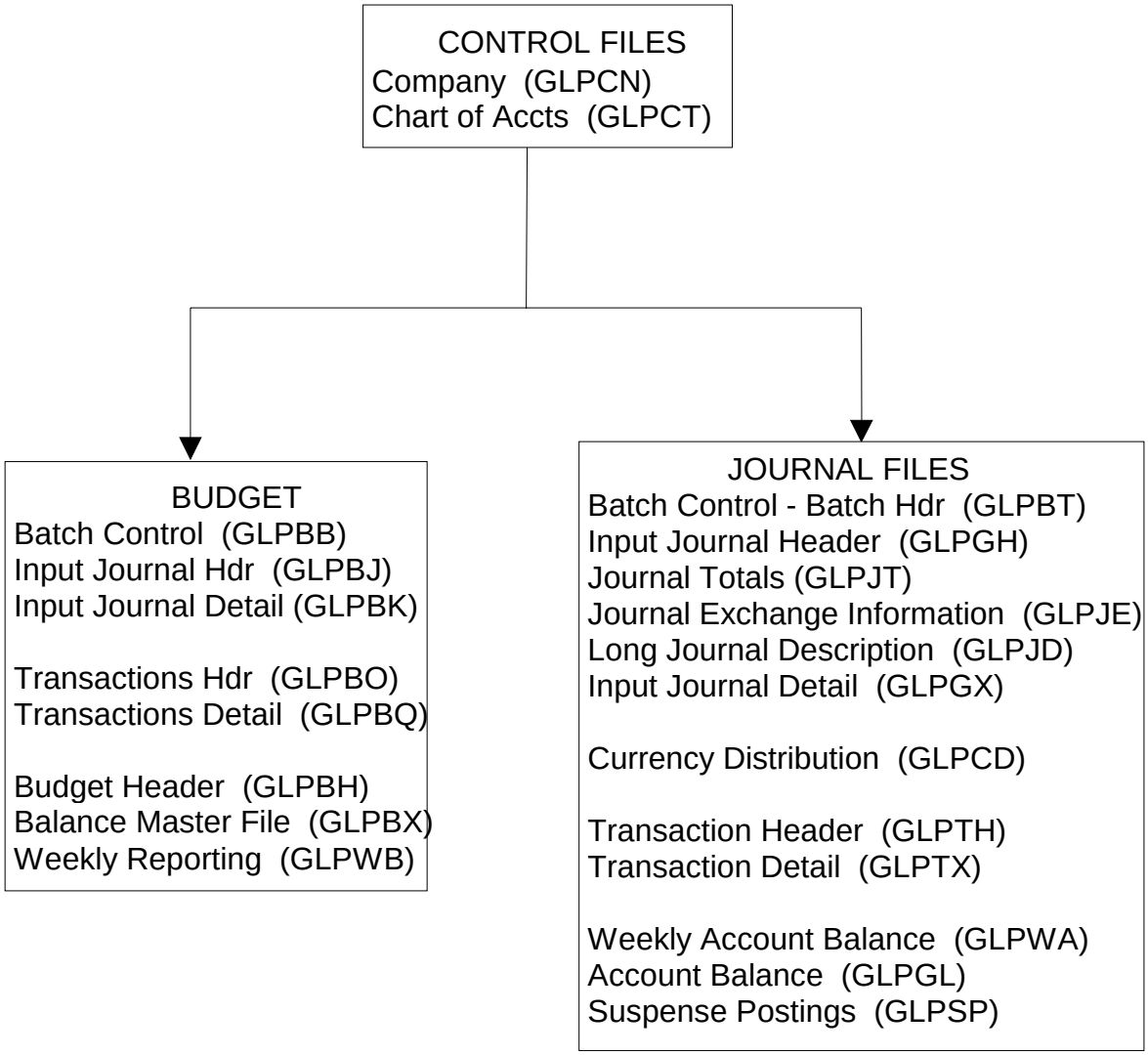
Infinium GL Files and Sample Reports

This appendix provides the following for your reference:

- The names of commonly-used Infinium GL files
- The following sample Infinium QY report worksheets and reports for Infinium GL

Topic	Page
Infinium GL Sample Design 1: List of Sales by Salesperson	E-5
Infinium GL Sample Design 2: Commission Earnings Report	E-7

Commonly-Used Infinium GL Files



Note: Refer to the tables on the pages for more information these files and their

Tables of Infinium GL Physical Files

The following tables identify commonly-used Infinium GL physical file names. The tables for budget and journal files identify for each listed file: the file name, description, and the type of function that uses the file. This format also lets you note which of these files are used in multiple functional contexts.

Control Files

Chart of Accounts File	Company Control File
GLPCT	GLPCN

Budget Files

File	Description	Input Budget Journals	Post Budget Journals	Work With Budgets
GLPBB	Budget Batch Control File	√	√	
GLPBJ	Budget Input Journal Header File	√		
GLPBK	Budget Input Journal Detail File	√		
GLPBO	Budget Transactions Header File		√	
GLPBQ	Budger Transactions Detail File		√	
GLPBH	Budget Header File		√	√
GLPBX	Budget Balance Master File		√	√
GLPWB	Weekly Reporting Budget File		√	√

Journal Files

File	Description	Journal Entry	Accept/Post Journal
GLPBT	Batch Control (Batch Header)	√	√
GLPGH	Input Journal Header	√	
GLPJT	Journal Totals	√	
GLPJE	Journal Exchange Information	√	
GLPJD	Long Journal Description	√	√
GLPGX	Input Journal Detail	√	
GLPCD	Currency Distribution	√	√
GLPTH	Transaction Header		√
GLPTX	Transaction Detail		√
GLPWA	Weekly Account Balance		√ N**ote:** Used only for posted journals, and only if controls for weekly balances are activated
GLPGL	Account Balance		√ **Note:** Used only for posted journals
GLPSP	Suspense Postings		√

The following pages provide sample worksheets and reports.

Infinium GL Sample Design 1:
List of Sales by Salesperson

Report Title:	*List of Sales by Salesperson*					
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Column Heading	*Sales-person*	*Accounting Month*	*Accounting Year*	*Sales Amount*		
Field Name	*TXAF01*	*TXMNTH*	*TXYEAR*	*TXFAMT Trans. Amt.*		
Library	*TRAINQYGL* →					
File	*GLPTX* (GL Transaction Detail File) →					
Derived Column						
Calculations						
Result String						
Format Option				*Totals*		
Selection Criteria		*EQ 9*	*EQ 1992*			
Group/Sort	*Sort = 1 Group Active*					
Join Column						

```
QYIREPORT    QYTOUTP       KDGL1            List of Sales by Salesperson                                                    Page   1
 7/29/93      9:35:19                                                                                                      QY2000
Sales
Rep                    Mth  Year   Sales Amount
====================  ===  =====  ============================
                        2   1992                $1,044,987.45-
                        2   1992                  $448,220.57-
                        2   1992                $1,580,994.20-
                        2   1992                   $60,548.74-
                        2   1992                   $23,845.21-
                        2   1992                   $51,844.91-
                        2   1992                   $10,244.87-
--------------------  ---  -----  ----------------------------
                                                $3,220,685.95-  Total
 Sales by                      . . :     7
-------------------------------------------------------------------------------------------------------------------------------
JENKINS                 2   1992                  $112,008.40
                        2   1992                  $101,288.45
                        2   1992                   $65,044.19
                        2   1992                   $12,344.04
                        2   1992                   $13,899.91
                        2   1992                    $7,221.98
                        2   1992                   $11,899.47
                        2   1992                    $3,281.81
                        2   1992                    $2,141.51
--------------------  ---  -----  ----------------------------
                                                  $329,129.76   Total
 Sales by JENKINS              . . :     9
-------------------------------------------------------------------------------------------------------------------------------
LAMB                    2   1992                   $25,488.12
                        2   1992                   $47,647.00

                        2   1992                   $17,522.17
                        2   1992                  $118,248.23
                        2   1992                   $22,277.80
                        2   1992                    $8,441.25
                        2   1992                    $5,912.48
                        2   1992                   $12,007.71
                        2   1992                      $899.28
--------------------  ---  -----  ----------------------------
                                                  $258,444.04   Total
 Sales by LAMB                 . . :     9
.
.
.
-------------------------------------------------------------------------------------------------------------------------------

Total records selected in report. . .:    42
                                  **********          End of Report          **********
```

Infinium GL Sample Design 2:
Commission Earnings Report

Report Title:	*Commission Earnings Report*					
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Column Heading	*Sales-person*	*Customer*	*Contract Date*	*Transaction Amt*	*Sales Dollars*	*Commission %*
Field Name	*TXAF01*	*TXAF02*	*TXDF1E*	*TXFAMT*	*Result Column*	*TXNF02 (No. Field 2)*
Library	*TRAINQYGL* →					
File	*GLPTX* (GL Transaction Detail File) →					
Derived Column					*Yes*	
Calcu-lations					*Col 4 * -1*	
Result String						
Format Option				*Do Not Print*	*Totals*	
Selection Criteria	*NE Blank*					
Group/Sort	*Sort 1 Group Active*	*Sort 2 Group Active*				
Join Column						

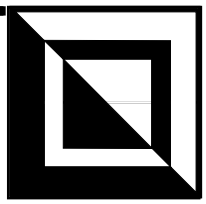
Infinium GL Sample Design 2:
Commission Earnings Report (Continued...)

Report Title:	*Commission Earnings Report*					
	Column 7	Column 8	Column 9	Column 10	Column 11	Column 12
Column Heading	*Commis-sion Earned*	*Acct no*	*Sales Acct*	*Description*	*Page Number*	*Page Number*
Field Name	*Result Column*	*CTACCT*	*Result String*	*CTDESC*	*TXPAGE*	*CTPAGE*
Library	*TRAINQYGL* →					
File	*GLPTX*	*GLPCT*		*GLPCT*	*GLPTX*	*GLPCT*
Derived Column	*Yes*		*Yes (Col 8)*			
Calcu-lations	Col 6*Col 5					
Result String			*Start = 13 Length = 4*			
Format Option	Totals	*Do Not Print*			*Do Not Print* →	
Selection Criteria						
Group/Sort						
Join Column					*12*	

```
QYIREPORT    QYTOUTP       KDGL2           Commission Earnings Report                                                    Page   1
 7/29/93      9:36:48                                                                                                      QY2000
Sales                                                          Contract    Sales
Rep                   Customer    Quantity                     Date        Dollars                 Percent
===================  ==========  ===================  ==========  ===================  ===============
JENKINS               ACME                  97250.00   2/28/1992            101288.45              0.04
                                             9500.00   2/23/1992             12344.04              0.03
                                             1750.00   2/26/1992              2141.51              0.05
                      ----------  -------------------  ----------  -------------------  ---------------
                                           108500.00
                                                                                                   0.04
                       ACME
-------------------------------------------------------------------------------------------------------------
                      NIAGRA               128000.00   2/05/1992            112008.40              0.03
                                            62500.00   2/10/1992             65044.19              0.04
                                            14000.00   2/07/1992             13899.91              0.03
                                             6200.00   2/17/1992              7221.98              0.05
                      ----------  -------------------  ----------  -------------------  ---------------
                                           210700.00
                                                                                                   0.04
                       NIAGRA
-------------------------------------------------------------------------------------------------------------
.
.
                      WORTHY                12000.00   2/24/1992             11899.47              0.04
                      ----------  -------------------  ----------  -------------------  ---------------
                                            12000.00
                                                                                                   0.04
                       WORTHY
-------------------------------------------------------------------------------------------------------------
-------------------  ----------  -------------------  ----------  -------------------  ---------------
                                           334200.00
                                                                                                   0.04
 Sales for JENKINS              . . :     9
-------------------------------------------------------------------------------------------------------------
LAMB                  ACME                   6250.00   2/14/1992              8441.25              0.04
                      ----------  -------------------  ----------  -------------------  ---------------
                                             6250.00
                                                                                                   0.04
                       ACME
-------------------------------------------------------------------------------------------------------------
QYIREPORT    QYTOUTP       KDGL2                          PAGE 001 OVERFLOW                                             Page   2
 7/29/93      9:36:48                                                                                                      QY2000
  Commission
  Earned
  ================================
                        $4,051.54
                          $370.32
                          $107.08
  --------------------------------
                        $4,528.94   Total
                                    Average
-------------------------------------------------------------------------------------------------------------------------------
Total records selected in report. . .:    35
                                     **********           End of Report           **********
```

Notes

Appendix F



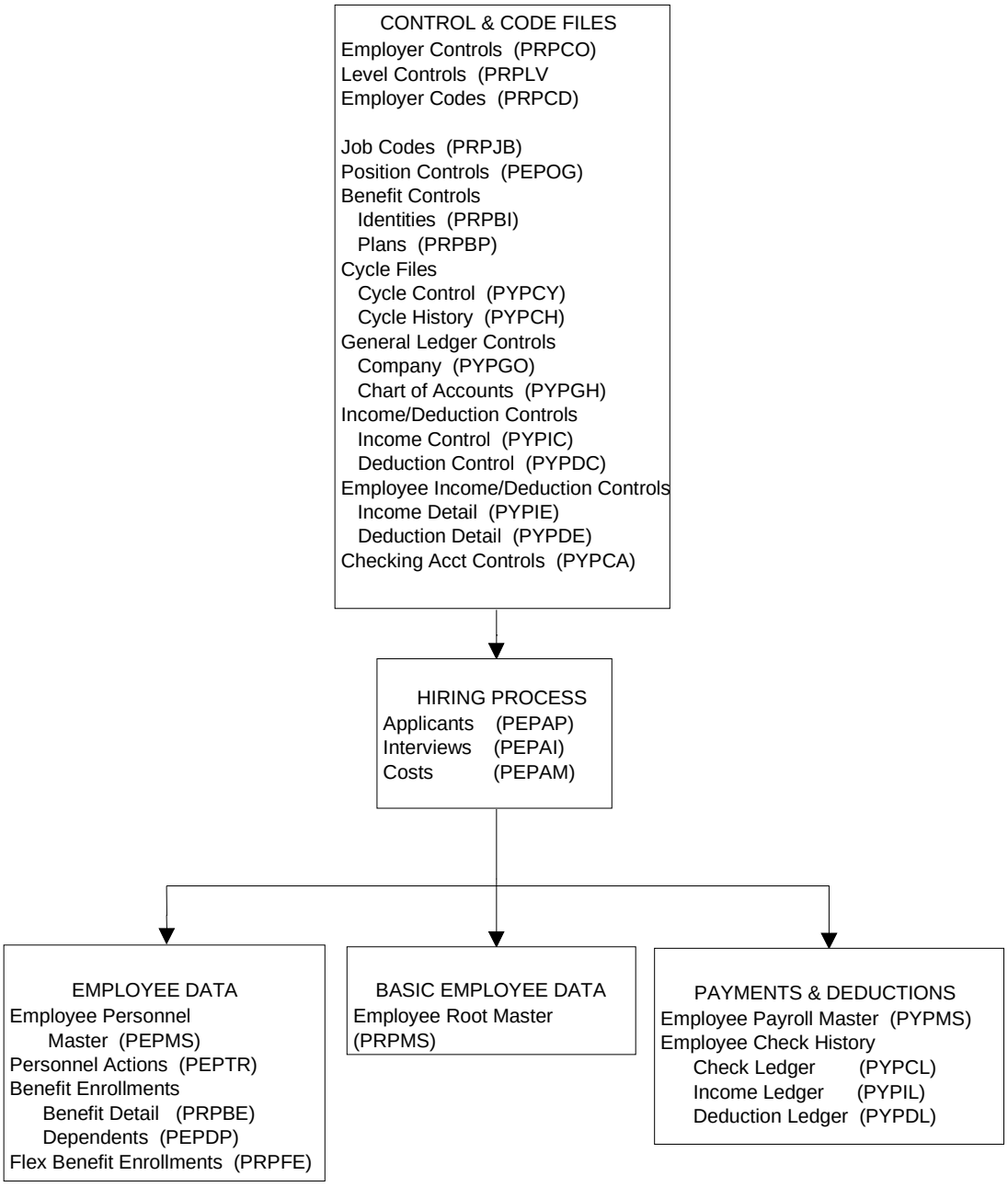
Infinium HR Files and Sample Reports

This appendix provides the following for your reference:

- The names of commonly-used Infinium HR files
- The following sample Infinium QY report worksheets and reports for Infinium HR

Topic	Page
Infinium HR Sample Design 1: Employee Listing	F-3
Infinium HR Sample Design 2: Employee Listing with Weekly Base Rate	F-5
Infinium HR Sample Design 3: Employee Dependent Listing	F-8
Infinium HR Sample Design 4: Payroll Employee Listing	F-11
Infinium HR Sample Design 5: Employee Listing with Income Codes	F-14

Commonly-Used Infinium HR/PY Files



Infinium HR Sample Design 1:
Employee Listing

Report Title:	*Employee Listing*					
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Column Heading	*Employee Name*	*Employee Number*	*Department*	*Employer No.*		
Field Name	*Complete Name*		*Level 2*			
Library	*TRAINQYHR* →					
File	*Root Master or Basic Data file (PRPMS) (Primary File)* →					
Derived Column						
Calcu-lations						
Result String						
Format Option						
Selection Criteria						
Group/Sort						
Join Column						

QYIREPORT QYTOUTP KDPE1 Employee Listing Page 1
7/29/93 9:15:01 QY2000

NAME - COMPLETE	EMPLOYEE Number	LEVEL (Dept	EMP
RODGERS,DONNA M	1	102	EGG
TREARQUIS,SUSAN R	6	202	
BURGER,BOB	9	202	
DOUGLAS,DONNA D	10	202	
DOE,JOHN	11	202	
O'BRIEN,ROBERT	12	102	
POTTS,PETER	17	102	
KATHERINE,MCCABE S	20	102	
HOOD,ROBIN	21	102	
COUGHLIN,MICHAEL E	22	202	
VERSE,VERNA V	26	102	
LOWE,ROBERT R	29	202	
JORDAN,JAMIE	39	202	
CASTELANO,ANNA Z	41	202	
SMITH,GEORGE	53	202	
STEVENS,MARK	55	102	
HANDY,HARRY H	65	102	
GONZO,GEORGE G	66	302	
THOMPSON,TIM	67	302	
MIGRANE,MARY M	69	202	
PETERSON,PAUL	70	202	
THOMPSON,THOMAS	71	202	
ROSE,FRANK	73	102	
BURKS,JOANN	80	102	
KERRY,KONIK	95	102	
WILLIS,MARK	96	202	
SMITH,ROBERT	99	102	
FISH,LINDA	100	302	
SMART,SALLY S	101	202	
SHANLEY,LORI A	105	302	
CRUMP,LESLIE G	108	302	
KEATING,REGINA	111	302	
ABNER,CHARLES H	112	102	
LONG,SHELLY	124	302	
QUAYLE,THOMAS	125	302	
LANCHESTER,LINDA	131	202	
O'KEEFE,BERNARD	133	302	
.			
.			
.			
DUKE,MICHAEL	321	302	
SMITH,ERICA	323	202	
JAFF,JACKI	3567	302	
KELLY,TERRY	10000	302	

Total records selected in report. . .: 63

********** End of Report **********

Infinium HR Sample Design 2:
Employee Listing with Weekly Base Rate

Report Title:	*Employee Listing with Weekly Base Rate*					
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Column Heading	*Company*	*Employee*	*Position Title*	*Base Pay Rate (Annual Pay)*	*Date of Hire (HYF)*	*Weekly*
Field Name	*Employer Code*	*Complete Name*	→	→		*Result Column*
Library	*TRAINQYHR*					
File	*Root Master (Primary File)*	*Root Master (PRPMS)*	*Personnel Master (PEPMS)*	*Root Master (PRPMS)*	*Root Master (PRPMS)*	
Derived Column						*yes*
Calcu-lations						*Col 4/52*
Result String						
Format Option	*Do Not Print*				*Date Conversion*	
Selection Criteria					*GE 02/01/88*	
Group/Sort						
Join Column						

Infinium HR Sample Design 2:
Employee Listing with Weekly Base Rate (Continued...)

Report Title:	*Employee Listing with Weekly Base Rate*					
	Column 7	Column 8	Column 9	Column 10	Column 11	Column 12
Column Heading	*BaseRate Frequency*	*Primary Language*	*Employer*	*EE Number*	*EE Number*	*Term Cde*
Field Name						
Library	*TRAINQYHR* →					
File	*Root Master (PRPMS)*	*PE Master (EPEMS)*	*PE Master (PEPMS)*	*PE Master (PEPMS)*	*Root Master (PRPMS)*	*Root Master (PRPMS)*
Derived Column						
Calcu-lations						
Result String						
Format Option	*Do Not Print*		*Do Not Print* →			
Selection Criteria	*EQ A*					*EQ Blank*
Group/Sort						
Join Column				*Col 11*		

QYIREPORT QYTOUTP KDPE2 Employee Listing with Weekly Base Rate Page 1
7/29/93 9:15:53 QY2000

Co.	Employee	POSITION TITLE	Base Pay Rate	Hire Date	Weekly Pay	F	Lang	
EGG	ADAMS,MARK S	DATA ENTRY CLERK	$26,251.0500	01/01/1989	$504.8279	A		
	BROOKS,MICHAEL B	DIRECTOR OF ENGINEER	$37,800.0000	05/25/1989	$726.9231	A		
	BURGER,BOB	ADMINISTRATIVE ASSIS	$25,000.0000	12/19/1989	$480.7692	A		
	BURKS,JOANN	SECRETARY	$20,000.0000	08/23/1990	$384.6154	A		
	COUGHLIN,MICHAEL E	ASSEMBLER	$100,000.0000	01/11/1990	$1,923.0769	A		
	CRUMP,LESLIE G	CHIEF EXECUTIVE OFFI	$20,679.7500	02/23/1990	$397.6875	A		
.								
.								
.								
.								
	RODGERS,DONNA M	PERSONNEL MANAGER	$31,500.0000	01/01/1989	$605.7692	A		
	SMITH,ERICA	DATA ENTRY CLERK	$20,000.0000	10/18/1989	$384.6154	A		
	SMITH,GEORGE	ADMINISTRATIVE ASSIS	$14,560.0000	03/27/1990	$280.0000	A		
	SMITH,JOE	COST ACCOUNTANT	$15,750.0000	05/30/1989	$302.8846	A		
	SMITH,LARRY L	ELECTRICAL ENGINEER	$26,250.0000	06/12/1989	$504.8077	A		
	SMITH,RODNEY T	DATA ENTRY CLERK	$20,000.0000	05/05/1989	$384.6154	A		
	STEVENS,MARK	ASSEMBLER	$15,000.0000	02/07/1990	$288.4615	A		
	THOMPSON,TIM	CORPORATE ATTORNEY	$52,500.0000	01/14/1990	$1,009.6154	A		
	WALKER,WALTER M	ASSEMBLER	$20,000.0000	07/08/1989	$384.6154	A		
	WALLACE,HAROLD	VICE PRESIDENT	$99,185.3100	12/15/1988	$1,907.4098	A		
	WATT,JAMES	DATA ENTRY CLERK	$15,000.0000	06/12/1989	$288.4615	A		
	WILLIS,MARK	ASSEMBLER	$30,000.0000	08/29/1990	$576.9231	A		
	YOUNG,THOMAS J	CHIEF FINANCIAL OFFI	$82,654.4300	01/30/1989	$1,589.5083	A		
			$1,406,819.3400		$27,054.2180			Total
			$37,021.5615		$711.9531			Average

Final report totals

			$1,406,819.3400		$27,054.2180			Total
			$37,021.5615		$711.9531			Average

Total records selected in report. . .: 38

********** End of Report **********

Infinium HR Sample Design 3:
Employee Dependent Listing

Report Title:	*Employee Dependent Listing*					
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Column Heading	*Employer*	*Employee Name*	*Dependent Name*	*Dependent Date of Birth*	*Dependent Social Sec. No.*	*Relationship to Employee*
Field Name	*PRER*	*PRCNM*	*DPDNM*	*DPDBE*	*DPSS*	*DPREL*
Library	*TRAINQYHR*					
File	*Root Master (PRPMS)*	*Root Master (PRPMS)*	*Dependent File (PEPDP - primary)*	*Dependent File (PEPDP)*	*Dependent File (PEPDP)*	*Dependent File (PEPDP)*
Derived Column						
Calcu-lations						
Result String						
Format Option						
Selection Criteria	*EQ EGG*					
Group/Sort	*Sort = 1 Group Active*	*Alpha Sort; Break size = 1 for line*				
Join Column	*Col 7*					

Infinium HR Sample Design 3:
Employee Dependent Listing (Continued....)

Report Title:	*Employee Dependent Listing*					
	Column 7	Column 8	Column 9	Column 10	Column 11	Column 12
Column Heading	*Company*	*EE No.*	*EE No.*	*Term Cde*		
Field Name	*DPER*	*DPEN*				
Library	*TRAINQYHR* →					
File	*Dependent File (PEPDP)*	*Dependent File (PEPDP)*	*Root Master (PRPMS)*	*Root Master (PRPMS)*		
Derived Column						
Calculations						
Result String						
Format Option	*Do Not Print* →					
Selection Criteria				*EQ Blank*		
Group/Sort						
Join Column		*Col 9*				

```
QYIREPORT    QYTOUTP       KDPE3          Employee Dependent Listing                                                    Page   1
 7/29/93      9:37:49                                                                                                  QY2000

                                                          Birth       Dependent
Co.  Employee                  Dependent                  Date        Social Sec   Rela.
===  ========================  ========================   ==========  ===========  =====
EGG  BROOKS,MICHAEL B          MICHELLE BROOKS            4/23/1953   999-99-9999  WIFE
     Dependents for Employee BROOKS,MICHAEL B          . . :     1
-------------------------------------------------------------------------------------------------------------------------------
     BURGER,BOB                KJHKJHKJHKJGH                                       BRO
     Dependents for Employee BURGER,BOB                . . :     1
-------------------------------------------------------------------------------------------------------------------------------
     CASTELANO,ANNA Z          CAROL                                               DAUG
                               ELIOT CASTELANO                                     HUSB
     Dependents for Employee CASTELANO,ANNA Z          . . :     2
-------------------------------------------------------------------------------------------------------------------------------
     DOBBINS,JAMES C           DONNA DOBBINS                                       DAUG
                               DAVID DOBBINS                                       SON
                               NANCY DOBBINS                                       WIFE
     Dependents for Employee DOBBINS,JAMES C           . . :     3
-------------------------------------------------------------------------------------------------------------------------------
.
.
.
.
-------------------------------------------------------------------------------------------------------------------------------
     KEATING,REGINA            CHUCK KEATING              11/13/1936  999-99-9999  HUSB
                               JOHN CROATTI               11/30/1970  999-99-9999  SON
                               PAUL CROATTI               12/06/1965  999-99-9999  SON
     Dependents for Employee KEATING,REGINA            . . :     3
-------------------------------------------------------------------------------------------------------------------------------
     STEVENS,MARK              NANCY STEVENS                                       MOM
                               KATHY STEVENS                                       SIS
     Dependents for Employee STEVENS,MARK              . . :     2
-------------------------------------------------------------------------------------------------------------------------------
     TREARQUIS,SUSAN R         NICOLE TREARQUIS                                    DAUG
                               JAMIE TREARQUIS                                     HUSB
     Dependents for Employee TREARQUIS,SUSAN R         . . :     2
-------------------------------------------------------------------------------------------------------------------------------
     VALENTE,DANIEL S          MARYANN VALENTE            8/07/1955               DAUG
                               DAVID VALENTE              9/08/1960   999-99-9999  SON
                               MARION VALENTE             2/01/1932   999-99-9999  WIFE
     Dependents for Employee VALENTE,DANIEL S          . . :     3
-------------------------------------------------------------------------------------------------------------------------------
     WALLACE,HAROLD            SUSAN WALLACE                                       DAUG
                               WALTER WALLACE                                      SON
                               THELMA WALLACE                                      WIFE
===  ========================  ========================   ==========  ===========  =====
EGG  YOUNG,THOMAS J            ELIZABETH YOUNG                                     DAUG
                               GIGI YOUNG                                          DAUG
                               MOLLY YOUNG                                         DAUG
                               TOM YOUNG                                           SON
                               JAYNE YOUNG                                         WIFE
     Dependents for Employee YOUNG,THOMAS J            . . :     5
-------------------------------------------------------------------------------------------------------------------------------
 Company EGG . . :    60
-------------------------------------------------------------------------------------------------------------------------------
Total records selected in report. . .:    60
                                    **********          End of Report          **********
```

Infinium HR Sample Design 4:
Payroll Employee Listing

Report Title:	*Payroll Employee Listing*					
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Column Heading	*Employer*	*Employee Last Name*	*Position*	*Cycle*	*Weekly Pay Rte*	*Proposed Increase*
Field Name	*Employer Code*	*PRLNM*	*PRPOS*	*Cycle Code*		
Library	*TRAINQYHR* →					
File	*Root Master (PRPMS - Primary File)*	*Root Master (PRPMS)*	*Root Master (PRPMS)*	*PY Master (PYPMS)*	*Root Master (PRPMS)*	
Derived Column						*yes*
Calculations						*Col 5 * 1.2*
Result String						
Format Option	*Do Not Print*					
Selection Criteria	*EQ = EGG*					
Group/Sort	*Sort 1*	*Sort 3*		*Sort 2*		
Join Column	*Col 7*					

Infinium HR Sample Design 4:
Payroll Employee Listing (Continued...)

Report Title:	*Payroll Employee Listing*					
	Column 7	Column 8	Column 9	Column 10	Column 11	Column 12
Column Heading	*Employer*	*EE No.*	*EE No.*	*Term code*	*Pay Frequency*	*Hire Date HYF*
Field Name						
Library	*TRAINQYHR* →					
File	*PY Master (PYPMS)*	*Root Master (PRPMS)*	*PY Master (PYPMS)*	*Root Maste (PRPMS)*	*Root Master (PRPMS)*	*Root Master (PRPMS)*
Derived Column						
Calculations						
Result String						
Format Option	*Do Not Print* →					
Selection Criteria				*EQ Blank*	*EQ W(eekly)*	*GE = 02/01/88*
Group/Sort						
Join Column		*Col 9*				

```
QYIREPORT    QYTOUTP       KDPY1          Payroll Employee Listing                                                    Page   1
 7/29/93      9:41:58                                                                                                QY2000
                                  CYCLE
Co.  Employee             POS'tn  code   BASE PAY RAT  Proposed Increase          F   Hire Date
===  ==================   ======  =====  ============  ========================== ==  ==========
EGG  O'BRIEN              DIVCON  BIWE       967.0500               $1,160.4600   W   02/03/1989
     VERSE                PERMGR             598.5000                 $718.2000   W   09/08/1984
     HANDY                CUSENG             705.6000                 $846.7200   W   02/28/1989
     GONZO                LAWYER            1308.3000               $1,569.9600   W   02/25/1989
     MIGRANE              ELENGR             787.5000                 $945.0000   W   05/09/1980
     THOMPSON             DVCONT             892.5000               $1,071.0000   W   02/07/1989
     ROSE                 PURAGT             703.5000                 $844.2000   W   01/04/1989
     SMITH                QCCENG             708.7500                 $850.5000   W   02/10/1989
                                  -----  ------------  -------------------------  --  ----------
                                                                     $8,006.0400                Total
                                  Cycle BIWE  . . :     8
-------------------------------------------------------------------------------------------------------------------------
     ABNER                TEST    WEEK       937.5000               $1,125.0000   W   04/01/1986
                                  -----  ------------  -------------------------  --  ----------
                                                                     $1,125.0000                Total
                                  Cycle WEEK  . . :     1
-------------------------------------------------------------------------------------------------------------------------
---  ------------------   ------  -----  ------------  -------------------------  --  ----------
                                                                     $9,131.0400                Total
 Company EGG . . :     9
-------------------------------------------------------------------------------------------------------------------------
-------------------
Final report totals
-------------------
===  ==================   ======  =====  ============  ========================== ==  ==========
                                                                     $9,131.0400                Total
-------------------------------------------------------------------------------
Total records selected in report. . .:     9
                                    **********          End of Report          **********
```

Infinium HR Sample Design 5:
Employee Listing with Income Codes

Report Title:	*Employee Listing with Income Codes*					
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Column Heading	*Employer*	*Dept*	*Employee*	*Earnings Types*	*Date of Hire*	*Title*
Field Name	*Employer Code*	*Reporting Levels*	*Last Name* →	*Income Codes*		
Library	*TRAINQYHR*					
File	*Root Master (PRPMS)*	*Root Master (PRPMS)*	*Root Master (PRPMS)*	*Income Codes PYPIE - Primary File)*	*Root Master (PRPMS)*	*Root Master (PRPMS)*
Derived Column						
Calculations						
Result String						
Format Option	*Do Not Print*				*Edit Format*	
Selection Criteria	*EQ = EGG*					
Group/Sort	*Sort = 1 Group Active*	*Sort = 2*	*Sort = 3 Group Active*			
Join Column	*Col 8*					

Infinium HR Sample Design 5:
Employee Listing with Income Codes (Continued...)

Report Title:	*Employee Listing with Income Codes*					
	Column 7	Column 8	Column 9	Column 10	Column 11	Column 12
Column Heading	*Term Code*	*Employer*	*EE No*	*EE No.*		
Field Name						
Library	*TRAINQYHR* →					
File	*Root Master (PRPMS)*	*Income Codes (PYPIE)*	*Income Codes (PYPIE)*	*Root Master (PRPMS)*		
Derived Column						
Calculations						
Result String						
Format Option	*Do Not Print* →					
Selection Criteria	*EQ Blank*					
Group/Sort						
Join Column			*Col 10*			

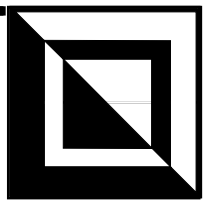
```
QYIREPORT    QYTOUTP       KDPY2          Employee Listings with Income Codes                                          Page   1
 7/29/93      9:45:03                                                                                                   QY2000
Dept.  NAME - LAST         INCOM  Hire Date   Title
=====  ==================  =====  ==========  ==============================
102    ABNER               HOUR   4/01/1986               TEST
102                        OT     4/01/1986               TEST
102                        HOL    4/01/1986               TEST
       Employee ABNER              . . :     3
-------------------------------------------------------------------------------------------------------------------------------
202    BROOKS              VAC    5/25/1989       DIRECTOR OF ENGINEERING
       Employee BROOKS             . . :     1
-------------------------------------------------------------------------------------------------------------------------------
202    BURGER              HOL    12/19/1989     ADMINISTRATIVE ASSISTANT
202                        VAC    12/19/1989     ADMINISTRATIVE ASSISTANT
       Employee BURGER             . . :     2
-------------------------------------------------------------------------------------------------------------------------------


202    CASTELANO           HOUR   11/22/1989       ENGINEERING SECRETARY
202                        OT     11/22/1989       ENGINEERING SECRETARY
202                        SICK   11/22/1989       ENGINEERING SECRETARY
       Employee CASTELANO          . . :     3
-------------------------------------------------------------------------------------------------------------------------------
202    COUGHLIN            HOUR   1/11/1990              ASSEMBLER
202                        OT     1/11/1990              ASSEMBLER
       Employee COUGHLIN           . . :     2
-------------------------------------------------------------------------------------------------------------------------------
102    DAY                 HOL    6/07/1989       DIRECTOR OF ENGINEERING
102                        HOUR   6/07/1989       DIRECTOR OF ENGINEERING
102                        OT     6/07/1989       DIRECTOR OF ENGINEERING
102                        VAC    6/07/1989       DIRECTOR OF ENGINEERING
       Employee DAY                . . :     4
-------------------------------------------------------------------------------------------------------------------------------
302    DUKE                EXECB  10/13/1989          VICE PRESIDENT
302                        SAL2   10/13/1989          VICE PRESIDENT
       Employee DUKE               . . :     2
.
.
.

-------------------------------------------------------------------------------------------------------------------------------
102    ROSE                HOUR   1/04/1989          PURCHASING AGENT
102                        OT     1/04/1989          PURCHASING AGENT
102                        SAL2   1/04/1989          PURCHASING AGENT
102                        VAC    1/04/1989          PURCHASING AGENT
       Employee ROSE               . . :     4
-------------------------------------------------------------------------------------------------------------------------------
-------------------------------------------------------------------------------------------------------------------------------
302    YOUNG               EXECB  1/30/1989       CHIEF FINANCIAL OFFICER
302                        HOL    1/30/1989       CHIEF FINANCIAL OFFICER
302                        SAL2   1/30/1989       CHIEF FINANCIAL OFFICER
       Employee YOUNG              . . :     3
-------------------------------------------------------------------------------------------------------------------------------
-------------------------------------------------------------------------------
Total records selected in report. . .:    76

                                      **********           End of Report           **********
```

Appendix G



Infinium MM Files and Sample Reports

This appendix provides the following for your reference:

- The names of commonly-used Infinium MM files
- The following sample Infinium QY report worksheets and reports for Infinium MM.

Topic	Page
Infinium MM Sample Design 1: Purchase Order Receiving Report	G-8
Infinium MM Sample Design 2: Purchase Issues and Transfers - Allocated Inventory Report	G-10
Infinium MM Sample Design 3: Raw Material Listing	G-14
Infinium MM Sample Design 4: Item Usage	G-16
Infinium MM Sample Design 5: Inventory Listing	G-19
Infinium MM Sample Design 6: Inventory Cost Report	G-21
Infinium MM Sample Design 7: Salespersons	G-24

Infinium MM

Commonly-Used
Infinium Purchase Management Files

Requisitions

REQUISITION HEADER FILE (PMPRH)

REQUISITION DETAIL FILE (PMPRD)

Purchase Orders

PURCHASE ORDER HEADER FILE (PMPPH)

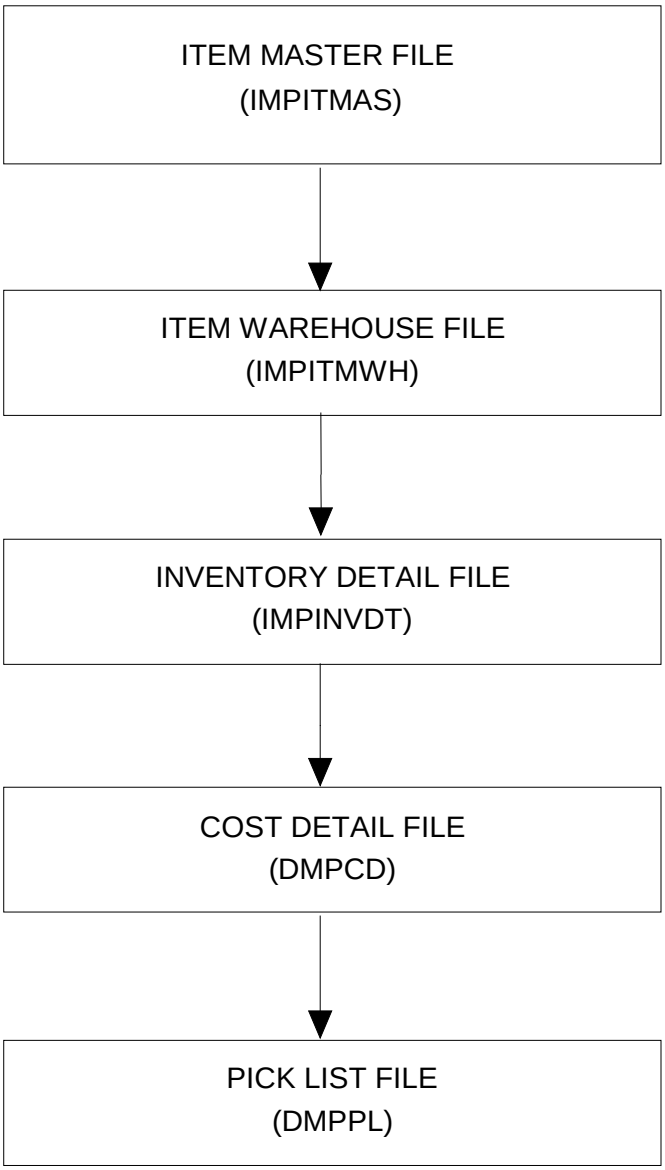
PURCHASE ORDER DETAIL FILE (PMPPD)

Receipts

PURCHASE ORDER RECEIPTS FILE (PMPPR)

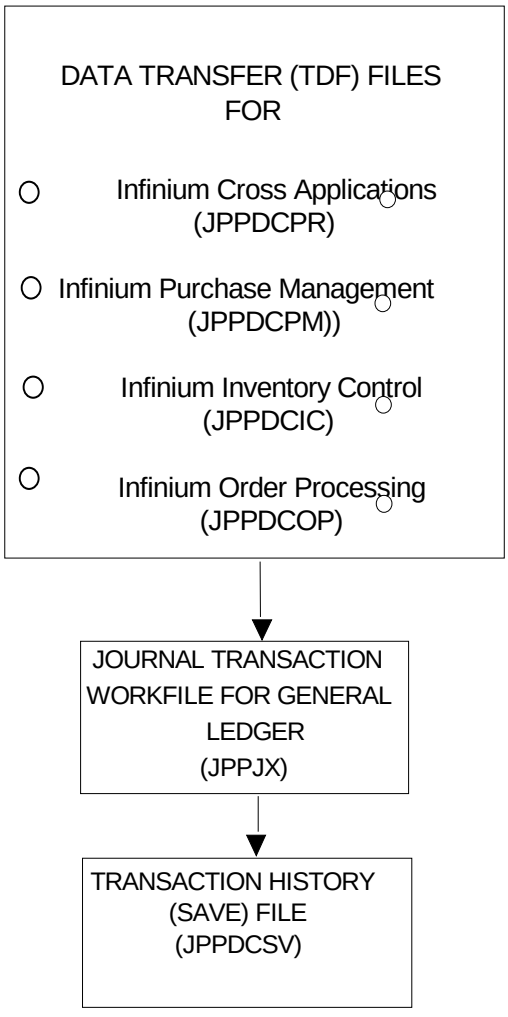
Infinium MM

Commonly-Used
Infinium Inventory Management Files



Infinium MM
Commonly-Used Infinium Journal Processor Files

If You Are Using
Infinium Cross Applications



Infinium MM
Commonly-Used
Infinium Order Processing Files

CONTROL AND AUDIT

Entity File
Company File
Warehouse File
Code Type File
Code Value File
Order Type File
Audit File

▼

ORDER

Header File - Open Orders
Detail File - Open Orders
Header File - History Orders
Detail File - History Orders
Miscellaneous Charge File
Line Item Storage Index File
Return Goods Authorize Header
Return Goods Authorize Detail
Return Goods Header History
Return Goods Detail History
Large Order Discount

▼

COMMENT

Order Comment File
Order Line Item Comment File
Customer/Product Comment File
Customer Comment File

Infinium MM
Commonly-Used Infinium Order Processing Files (Continued...)

MASTER FILES

Sold to Customer Master File (KLCUSFIL)
Salesperson Master File (OPPSLM)
Sales Tax (OPPTAX)
Product File (MANFILPF)

Note: KLCUSFIL is located in Infinium Cross Applications

PRICE FILES

Base Price File (OPPBSE)
Initial Price File (OPPINP)
Customer/Product Quote File (OPPCPQ)
Customer Product Price File (OPPCPS)
Product File (MANFILPF)
Contract Price File (OPPCNT)
Group Quote File Header (OPPQTH)

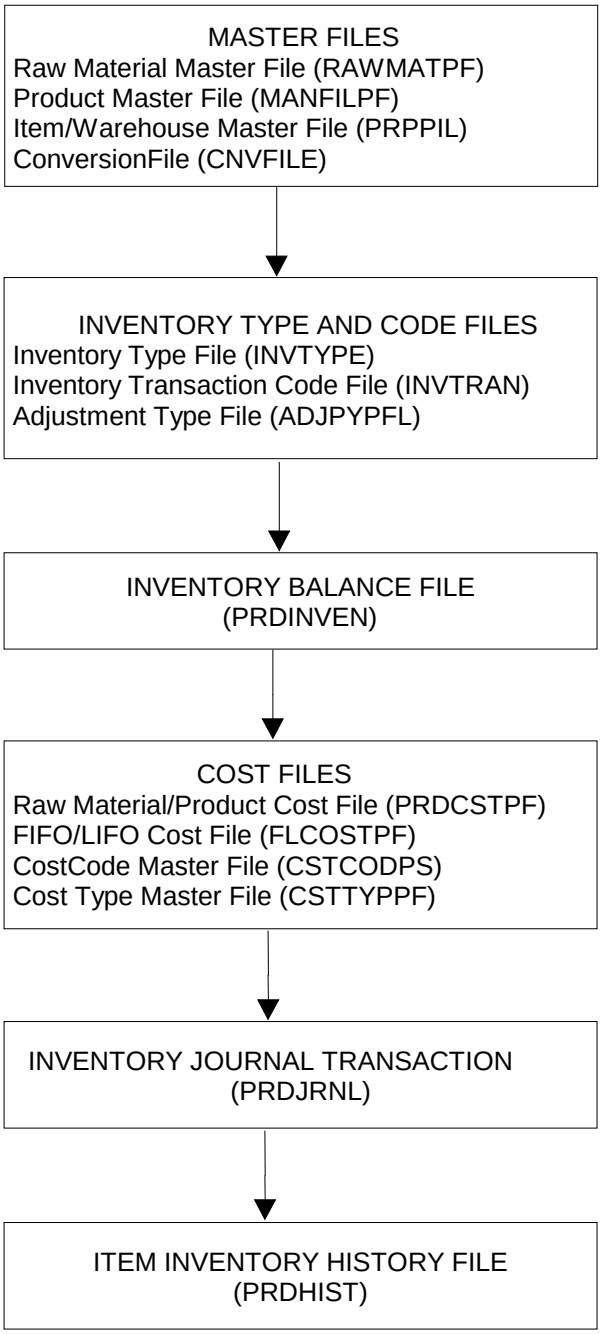
SALES FILES

Sales Master Detail History File (SASALMST)
Sales Analysis Location Summary (SASALLOC
Sales Analysis Location/DailyFile (SADALLOC)
Sales Analysis Customer (SASALCUS)
Sales Analysis Product (SASALPRD)
Sales Analysis Product/Customer (SASALPRC)
Sales Analysis Customer/Product (SASALCUP)
Sales Analysis Salesman (SASALSLM)
Sales Analysis Salesman/Product/Customer (SASALSPC)
Sales Analysis Daily File (SADALLOC)
Sales Accumulation Daily Orders (SALACC)
Sales Budget (SABUDGET)
Sales Tax Accumulator (OPPTXA)
Customer Product Price File (OPPCPS)

Infinium MM

Commonly-Used

Infinium Inventory Control and Cross Applications Files



Infinium MM Sample Design 1:
Purchase Order Receiving Report

Report Title:	*Purchase Order Receiving Report*					
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Column Heading	*Company*	*Item Code*	*Purchase Order ID*	*Quantity Rec-d*	*Date Received*	
Field Name	*PRCO*	*PRICDE*	*PRPOID*	*PRRCQT*	*PREREC*	
Libraries	*TRAINQYAR* →					
File	*PMPPR* →					
Derived Column						
Calculations						
Result String						
Format Option						
Selection Criteria						
Group/Sort						
Join Column						

QYIREPORT QYTOUTP KDPM1 Purchase Order Receiving Report Page 1
7/29/93 9:39:46 QY2000

Co.	Item code	P.O. ID	Quantity Received	Date Received
1	BARBELLS	001/00000580/P	50.0000	12191991
1	ASPRIN	001/00001468/P	1.0000	4011992
1	ASPRIN	001/00001468/P	1.0000	2131992
1	ASPRIN	001/00001513/P	10.0000	4011992
1	ASPRIN	001/00001513/P	10.0000	2151992
1	ASPRIN	001/00001513/P	1.0000	2021992
1	ASPRIN	001/00001513/P	1.0000	2151992
31	1234	031/00000677/P	500.0000	12271991
31	1234	031/00000677/P	600.0000	12271991
31	1234	031/00001522/P	100.0000	2181992
KMR	456	KMR/00000503/P	50.0000	12171991
KMR	456	KMR/00000503/P	25.0000	12171991
KMR	123	KMR/00000484/P	2.0000	12181991
KMR	123	KMR/00000484/P	4.0000	12181991
KMR	123	KMR/00000519/P	10.0000	12181991
KMR	456	KMR/00000519/P	20.0000	12181991
KMR	123	KMR/00000519/P	25.0000	12181991
KMR	123	KMR/00000519/P	25.0000	12181991
KMR	123	KMR/00000519/P	20.0000	12181991
KMR	123	KMR/00000519/P	1.0000	12181991
KMR	007	KMR/00000548/P	66666.0000	12191991
KMR		KMR/00000547/P	50.0000	12191991
KMR	123	KMR/00000546/P	2.0000	12191991
KMR	007	KMR/00000546/P	2.0000	12191991
KMR	007	KMR/00000546/P	3.0000	12191991
KMR	007	KMR/00000546/P	1.0000	12191991
KMR	007	KMR/00000546/P	1.0000	12191991
KMR		KMR/00000547/P	50.0000	12191991
KMR	123	KMR/00000597/P	25.0000	12201991
KMR	123	KMR/00000597/P	26.0000	12201991
KMR	007	KMR/00000605/P	0.0000	12201991
KMR	007	KMR/00000605/P	10.0000	12201991
KMR	123	KMR/00000598/P	10.0000	12201991
KMR	123	KMR/00000616/P	10.0000	12201991
KMR	001	KMR/00000620/P	100.0000	12201991
.				
.				
.				
.				
APCOM	AP1000.....APC/00001016/P		1200l.000	1/08/1992
KMR....456		KMR/00000786/P	4.0000	1/08/1992
QA7	BL01-0001-01	QA7/00001014/P	25.000	1/08/1992
QA7	TI01-0001-01	QA7/00001014/P	550.0000	1/08/1992
130	GB002	130/00001058/P	12.0000	1/09/1992
KMR	123-	KMR/00001059/P	25.0000	1/10/1992
50350	I1	503/00001060/P	1000.0000	1/10/1992

Total records selected in report. . .: 100

Infinium MM Sample Design 2:
Purchase Issues and Transfers - Allocated Inventory Report

Report Title:	*Purchase Issues and Transfers - Allocated Inventory Report*					
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Column Heading	*Company*	*Warehouse*	*Item Code*	*On Hand Quantity*	*Req. ID*	*Sequence Number*
Field Name	*IMCMPY*	*IMWHSE*	*IMINBR Item Number*	*IMWOHQ*	*RDRID*	*RDSEQ*
Libraries	*TRAINQYDM* →					
File	*IMPITMWH Item/Whse*	*IMPITMWH*	*Item/Whse*	*Item/Whse*	*Req. Detail PMPRD*	*Req. Detail*
Derived Column						
Calcu-lations						
Result String						
Format Option				*Total Average*		
Selection Criteria						
Group/Sort	*Sort = 1 Group Active*	*Sort = 1 Group Active*				
Join Column			*Col 9*			*Col 10*

Infinium MM Sample Design 2:
Purchase Issues and Transfers - Allocated Inventory Report (Continued...)

Report Title:	*Purchase Issues and Transfers - Allocated Inventory Report*					
	Column 7	Column 8	Column 9	Column 10	Column 11	Column 12
Column Heading	*Allocated Qty*	*Available Qty*	*Item Code*	*Sequence No.*		
Field Name	*PLALQT*	*Result Column*	*RDICDE*	*PLRSEQ*		
Libraries	*TRAINQYDM* →					
File	*Pick List DMPPL*		*Req. Detail File*	*Pick List File*		
Derived Column		*yes*				
Calculations		*Col 4 - Col 7*				
Result String						
Format Option	*Total*		*Do Not Print*	*Do Not Print*		
Selection Criteria						
Group/Sort						
Join Column						

QYIREPORT QYTOUTP KDPM2 Purchase Issues & Transfers - Alloc. Inv.Report Page 1
7/29/93 9:27:19 QY2000

COMPA	WHS	ITEM NUMBER	ON-HAND QUANTITY	Requisition ID	Sequen	Allocated Qty	Available Quantity
1	1	DESK	1.0000	PPI-000425-PM2-R	3	16.000 0	15.0000-
		DESK	1.0000	PPI-000428-PM2-R	3	16.000.0	15.0000-
		DESK	1.0000	PPI-000425-PM2-R	3	4.000.0	3.0000-
		DESK	1.0000	PPI-000428-PM2-R	3	4.000 0	3.0000-
		DESK	1.0000	PPI-000425-PM2-R	3	6.000 0	5.0000-
		DESK	1.0000	PPI-000428-PM2-R	3	6.000 0	5.0000-
			6.0000			52.000 0	Total
			1.0000				Average
1							
2		DESK	0.0000	PPI-000425-PM2-R	3	16.000 0	16.0000-
		DESK	0.0000	PPI-000428-PM2-R	3	16.000 0	16.0000-
		DESK	0.0000	PPI-000425-PM2-R	3	4.000 0	4.0000-
		DESK	0.0000	PPI-000428-PM2-R	3	4.000 0	4.0000-
		DESK	0.0000	PPI-000425-PM2-R	3	6.000 0	6.0000-
		DESK	0.0000	PPI-000428-PM2-R	3	6.000 0	6.0000-
			0.0000			52.000 0	Total
			0.0000				Average
2							
3		DESK	0.0000	PPI-000425-PM2-R	3	16.000 0	16.0000-
		DESK	0.0000	PPI-000428-PM2-R	3	16.000 0	16.0000-
		DESK	0.0000	PPI-000425-PM2-R	3	4.000 0	4.0000-
		DESK	0.0000	PPI-000428-PM2-R	3	4.000 0	4.0000-
		DESK	0.0000	PPI-000425-PM2-R	3	6.000 0	6.0000-
		DESK	0.0000	PPI-000428-PM2-R	3	6.000 0	6.0000-
			0.0000			52.000 0	Total

```
                    0.0000                                    Average
    3
-------------------------------------------------------------------------------------------------------------------------
===== === ==================== ================== ==================== ====== ==================
=======================
                    6.0000                    156.000 0          Total
                    0.3333                                    Average
 1
-------------------------------------------------------------------------------------------------------------------------
-------------------
Final report totals
-------------------
===== === ==================== ================== ==================== ====== ==================
=======================
                    6.0000                    156.000 0          Total
                    0.3333                                    Average
-------------------------------------------------------------------------
Total records selected in report. . .:   118
                    **********        End of Report        **********
```

Infinium MM Sample Design 3:
Raw Material Listing

Report Title:	*Raw Material Listing*					
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Column Heading	*Company*	*Location*	*Raw Materials*	*Size*		
Field Name	*RMCO*	*RMPLOC*	*RMPRDN*	*RMSIZE*		
Library	*TRAINQYMM*					
File	*RAWMATPF*					
Derived Column						
Calculations						
Result String						
Format Option						
Selection Criteria	*EQ QY*	*GE 2 and LE 5*				
Group/Sort	*Sort = 1 Group Active*	*Sort = 2 Group Active*				
Join Column						

```
QYIREPORT    QYTOUTP       RAWMAT         Raw Material Listing                                                                    Page   1
 7/28/93     13:35:55                                                                                                              QY2000
COMPANY     LOC    RM            SIZ
==========  =====  ============  ===
    QY      2      REDINK        GL
                   BLKINK        GL
                   GRNINK        GL
                   BLUEINK       GL
                   WHITINK       GL
                   PINKINK       GL
                   BOX           EA
                   PAPER         EA
                   PULP          LB
                   WOOD          FT
             2
-------------------------------------------------------------------------------------------------------------------------------------
            3      WHTPT         GL
                   BLUPT         GL
                   BLKPT         GL
                   GRNPT         GL
                   REDPT         GL
                   ORGPT         GL
                   SILVER        OZ
             3
-------------------------------------------------------------------------------------------------------------------------------------
            4      ACETONE       GL
                   ALCOHOL       GL
                   PEROXIDE      GL
                   ACID          GL
                   WATER         GL
                   PLASTIC       FT
                   TEFLON        LB
                   WIRE          FT
             4
-------------------------------------------------------------------------------------------------------------------------------------
            5      REDDYE        GL
                   BLUEDYE       GL
                   GRNDYE        GL
                   COPPER        LB
                   GOLD          OZ
             5
-------------------------------------------------------------------------------------------------------------------------------------

-------------------------------------------------------------------------------------------------------------------------------------
-------------------------------------------------------------------------------
Total records selected in report. . .:    30
                                        **********           End of Report           **********
```

Infinium MM Sample Design 4:
Item Usage

Report Title:	*Item Usage*					
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Column Heading	*Company*	*Location*	*Product*	*Size*	*Item Desc*	*Mfg. Units*
Field Name	*PHCO*	*PHLOC*	*PHPROD*	*PHSIZE*	*MNDESC*	*PHMUSQ*
Library	*TRAINQYMM*					
File	*PRDHIST* →					
Derived Column		→				
Calculations						
Result String						
Format Option						
Selection Criteria	*EQ QLY*	*EQ 4 and EQ 5*				
Group/Sort	*Sort = 1 Group Active*	*Sort = 2 Group Active*	*Sort = 3*			
Join Column			*col 10*	*col 11*		

Infinium MM Sample Design 4: Item Usage (Continued...)

Report Title:	*Item Usage*					
	Column 7	Column 8	Column 9	Column 10	Column 11	Column 12
Column Heading	*Sales Units*	*Month/Yr*	*Total Quan*	*Product*	*Size*	
Field Name	*PHSLSQ*	*PHYYMM*	*Result*	*MNMFGN*	*MNSIZE*	
Library	*TRAINQYMM* →					
File	*PRDHIST* →			*MANFILPF* →		
Derived Column						
Calculations			*col 6 + col 7*			
Result String						
Format Option				*No print*	*No print*	
Selection Criteria		*GE 9201*				
Group/Sort						
Join Column						

```
QYIREPORT    QYTOUTP       ITEMUSE        ITEM USAGE                                                                    Page   1
 7/28/93     13:38:17                                                                                                   QY2000
COMPANY   LOC    SIZ  ITEM DESC                          MFG UNITS      SALES UNITS    MONTH     TOT QUAN
========  =====  ===  ============================  =============  =============  ========  =================
   QY     Q      2LT  COCA-COLA                             0.450          0.710   9210                1.160
          Q
-------------------------------------------------------------------------------------------------------------------------------
          1      LB   RED DELICIOUS APPLES                  0.500          1.000   9206                1.500
                 LB   RED DELICIOUS APPLES                  0.200          0.500   9207                0.700
                 CAN  RED BEANS                             0.890          0.960   9303                1.850
                 EA   PAPER BACK BOOK                       0.400          0.600   9202                1.000
                 EA   PAPER BACK BOOK                       0.990          1.990   9203                2.980
                 EA   CARDBOARD BOX                         0.800          0.900   9207                1.700
                 LB   CHEDDAR CHEESE                        0.890          3.400   9306                4.290
                 LB   SWEET CHERRIES                        4.590          5.689   9203               10.279


                 LB   SWEET CHERRIES                        0.500          0.900   9204                1.400
                 2LT  COCA-COLA                             0.890          1.300   9211                2.190
                 EA   SALTINE CRACKERS                      0.876          0.980   9312                1.856
                 PT   HEAVY WHIPPING CREAM                  0.860          0.980   9301                1.840
                 EA   3.5 DISK                              0.100          2.000   9308                2.100
                 EA   BRASS FRAME 5 X 7                     0.840          3.300   9205                4.140
                 BAG  BLOCK ICE                             0.900          1.000   9205                1.900
                 BAG  BLOCK ICE                             0.345          0.679   9206                1.024
                 BAG  BLOCK ICE                             0.856          1.209   9207                2.065
                 JAR  GRAPE JELLY                           0.100          0.300   9207                0.400
                 GL   2% MILK                               0.400          0.500   9211                0.900
                 GL   2% MILK                               0.400          0.790   9212                1.190
                 GL   2% MILK                               0.500          0.780   9210                1.280
                 EA   WATERCOLOR PAPER                      0.271          0.500   9201                0.771
                 EA   WATERCOLOR PAPER                      0.890          1.400   9202                2.290
                 EA   BALL POINT PEN                        0.800          0.900   9303                1.700
                 EA   NO. 2 LEAD PENCIL                     0.400          0.850   9309                1.250
                 LB   RADISHES                              0.400          0.700   9208                1.100
                 EA   STAPLER                               0.400          0.700   9206                1.100
           1
-------------------------------------------------------------------------------------------------------------------------------
     QY

-------------------------------------------------------------------------------------------------------------------------------
--------------------------------------------------------------------------------
Total records selected in report. . .:    28
                                      **********          End of Report          **********
```

Infinium MM Sample Design 5:
Inventory Listing

Report Title:	*Inventory Listing*					
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Column Heading	*Company*	*Location*	*Product*	*Size*	*Type*	*Quantity*
Field Name	*MICO*	*MILOC*	*MIPROD*	*MISIZE*	*MITYPE*	*MIQTY*
Library	*TRAINQYMM* →					
File	*PRDINVEN* →					
Derived Column						
Calculations						
Result String						
Format Option						
Selection Criteria	*EQ QY*	*EQ 1*			*EQ 20*	
Group/Sort						
Join Column						

QYIREPORT QYTOUTP INVLST Inventory Listing Page 1
7/26/93 15:41:26 QY2000

COMPANY	LOC	ITEM	SIZ	TYPE	QUAN
QY	1	Apples	LB	20	0.500
QY	1	Peaches	LB	20	0.250
QY	1	Bananas	BNC	20	0.400
QY	1	Grapes	LB	20	0.100
QY	1	Cherries	GL	20	0.150
QY	1	Oranges	BAG	20	0.300
QY	1	Jelly	JAR	20	0.500
QY	1	Juice	GL	20	0.200
QY	1	Milk	GL	20	0.100
QY	1	Milk	QT	20	0.400
QY	1	Cream	PT	20	0.150
QY	1	Coke	2LT	20	0.500
QY	1	Pepsi	2LT	20	0.400
QY	1	Cheese	LB	20	0.200
QY	1	Beans	CAN	20	0.100
QY	1	Radishes	LB	20	0.350
QY	1	Ice	BAG	20	0.425
QY	1	Carrots	BAG	20	0.125
QY	1	Plums	LB	20	0.300
QY	1	Crackers	EA	20	0.250
QY	1	Paper	EA	20	0.100
QY	1	Calendar	EA	20	0.225
QY	1	Frame	EA	20	0.175
QY	1	Book	EA	20	0.450
QY	1	Water	GL	20	0.100
QY	1	Disk	EA	20	0.075
QY	1	Pen	EA	20	0.100
QY	1	Pencil	EA	20	0.500
QY	1	Stapler	EA	20	0.400
QY	1	Box	EA	20	0.175

Total records selected in report. . .: 30

********** End of Report **********

Infinium MM Sample Design 6:
Inventory Cost Report

Report Title:	*Inventory Cost Report*					
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Column Heading	*Company*	*Location*	*Item*	*Size*	*Type*	*Quantity*
Field Name	*MICO*	*MILOC*	*MIPROD*	*MISIZE*	*MITYPE*	*MIQTY*
Library	*TRAINQYMM* →					
File	*PRDINVEN* →					
Derived Column						
Calculations						
Result String						
Format Option						
Selection Criteria	*EQ QY*	*EQ 1*			*EQ 20*	
Group/Sort	*Sort = 1*	*Sort = 2*	*Sort = 3*	*Sort = 4*		
Join Column						

Infinium MM Sample Design 6:
Inventory Cost Report (Continued...)

Report Title:	*Inventory Cost Report*					
	Column 7	Column 8	Column 9	Column 10	Column 11	Column 12
Column Heading	*Company*	*Location*	*Product*	*Size*	*Current Cost*	*Value of Inventory*
Field Name	*PCCON*	*PCLO*	*PCMTLN*	*PCSIZE*	*PCCUCS*	*Result*
Library	*TRAINQYMM* →					
File	*PRDCSTPF* →					
Derived Column						*yes*
Calculations						*Col 11 * Col 6*
Result String						
Format Option	*No Print*					
Selection Criteria						
Group/Sort						
Join Column	*01*	*02*	*03*	*04*		

QYIREPORT QYTOUTP INVCOST INVENTORY COST REPORT Page 1
7/28/93 13:42:47 QY2000

COMPANY	LOC	ITEM	SIZ	TY	QUAN	COST	INV VALUE
QY	1	Apples	LB	20	0.500	0.0001	0.0006
QY	1	Bananas	BNC	20	0.400	0.0003	0.0018
QY	1	Beans	CAN	20	0.100	0.0013	0.0078
QY	1	Book	EA	20	0.450	0.0036	0.0216
QY	1	Box	EA	20	0.175	0.0067	0.0402
QY	1	Calendar	EA	20	0.225	0.0015	0.0090
QY	1	Carrots	BAG	20	0.125	0.0009	0.0054
QY	1	Cheese	LB	20	0.200	0.0004	0.0024
QY	1	Coke	2LT	20	0.500	0.0004	0.0024
QY	1	Crackers	EA	20	0.250	0.0006	0.0036
QY	1	Cream	PT	20	0.150	0.0007	0.0042
QY	1	Disk	EA	20	0.075	0.0005	0.0030
QY	1	Frame	EA	20	0.175	0.0025	0.0150
QY	1	Grapes	LB	20	0.100	0.0003	0.0018
QY	1	Ice	BAG	20	0.425	0.0002	0.0012
QY	1	Jelly	JAR	20	0.500	0.0003	0.0018
QY	1	Juice	GL	20	0.200	0.0010	0.0060
QY	1	Milk	GL	20	0.100	0.0002	0.0012
QY	1	Milk	QT	20	0.400	0.0001	0.0006
QY	1	Oranges	BAG	20	0.300	0.0006	0.0036
QY	1	Paper	EA	20	0.100	0.0017	0.0102
QY	1	Peaches	LB	20	0.250	0.0002	0.0012
QY	1	Pen	EA	20	0.100	0.0027	0.0162
QY	1	Pencil	EA	20	0.500	0.0015	0.0090
QY	1	Pepsi	2LT	20	0.400	0.0002	0.0012
QY	1	Plums	LB	20	0.300	0.0013	0.0078
QY	1	Radishes	LB	20	0.350	0.0007	0.0042
QY	1	Stapler	EA	20	0.400	0.0007	0.0042
QY	1	Water	GL	20	0.100	0.0007	0.0042

Total records selected in report. . .: 29

********** End of Report **********

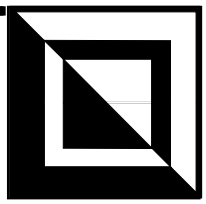
Infinium MM Sample Design 7: Salespersons

Report Title:	*Salespersons*					
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Column Heading	*Company*	*Salesperson ID*	*Name*	*Region*		
Field Name	*SLCOMP*	*SLSMAN*	*SLNAME*	*SLREGN*		
Library	*TRAINQYMM* →					
File	*OPPSLM* →					
Derived Column						
Calculations						
Result String						
Format Option						
Selection Criteria	*EQ QY*					
Group/Sort						
Join Column						

```
QYIREPORT    QYTOUTP       SLPLIST        Salespersons                                                    Page   1
 7/28/93     13:44:24                                                                                     QY2000
COMPANY   SLP ID   NAME                            REGION
========  =======  ==============================  =======
QY        001      Jane Adams                      MW
QY        002      Thomas Jefferson                MW
QY        003      Will Jefferies                  MW
QY        004      Samuel Adams                    MW
QY        005      Cathy Smith                     MW
QY        006      Sandy Stone                     MW
QY        007      Sara Jacobs                     SO
QY        008      Pamela Davis                    SO
QY        009      Kelly Robinson                  SO
QY        010      Mark Sanders                    SO
QY        011      Paul Fry                        SO
QY        012      Edward Gelson                   NE
QY        013      Terry Ferg                      NE
QY        014      Cameron Flener                  NE
QY        015      Robert Esters                   NE
QY        016      Maria Gerber                    NE
QY        017      Melissa Gernet                  NE
QY        018      Linda Nugent                    SW
QY        019      Rick Munger                     SW
QY        020      Patrick Mulvey                  SW
QY        021      Carla Miller                    SW
QY        022      Greg McNealy                    SW
QY        023      Dennis Menace                   SW
QY        024      Mark Syder                      SW
QY        025      Lee Turner                      NW
QY        026      David Bradley                   NW
QY        027      Brenda Bryant                   NW
QY        028      Roxanne Brendel                 NW
QY        029      Laura Bartlett                  NW
QY        030      Johnny Apple                    NW
-------------------------------------------------------------------------------
Total records selected in report. . .:    30
                                        **********          End of Report          *******
```

Notes

Appendix H



Infinium PL Files and Sample Reports

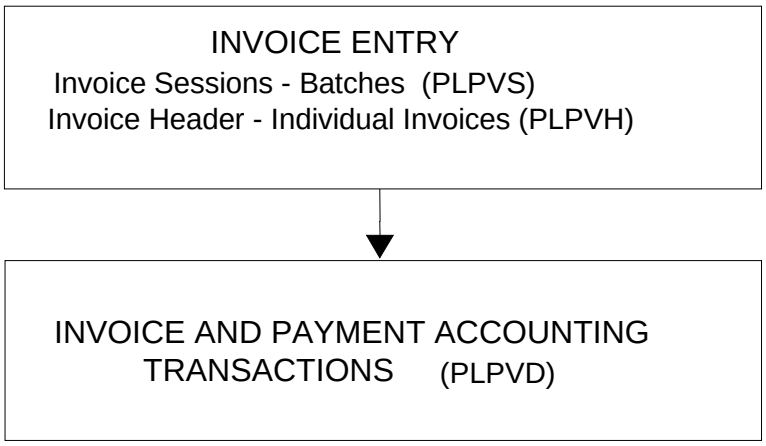
This appendix provides the following for your reference:

- The names of commonly-used Infinium PL files
- The following sample Infinium QY report worksheets and reports for Infinium PL

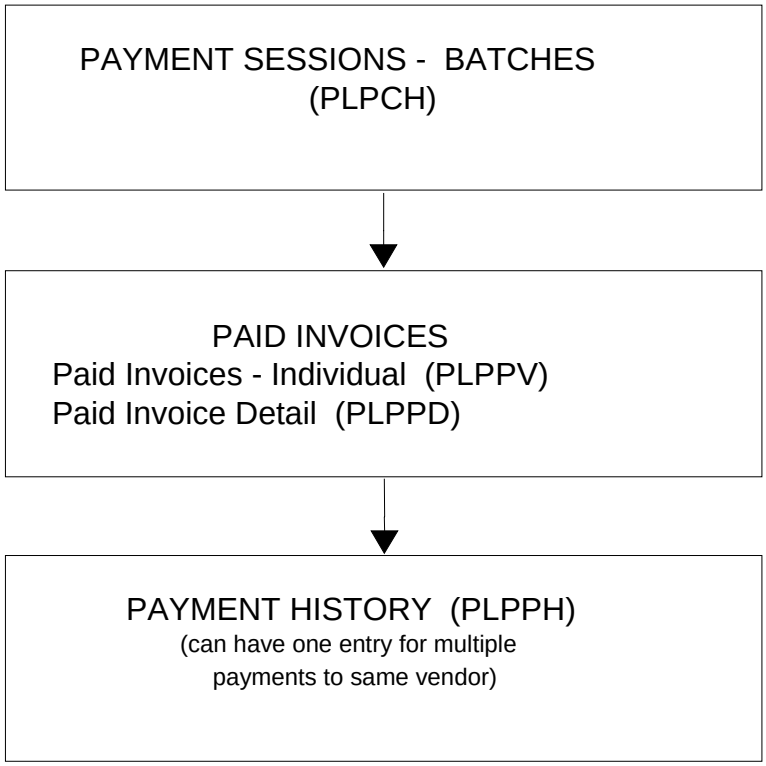
Topic	Page
Infinium PL Sample Design 1: 1099 Vendors without a 1099 Code	H-4
Infinium PL Sample Design 2: Paid Invoices Report by Vendor	H-7
Infinium PL Sample Design 3: Vendor Payments to Customers with Balances	H-11

Commonly-Used Infinium PL Files

Invoices

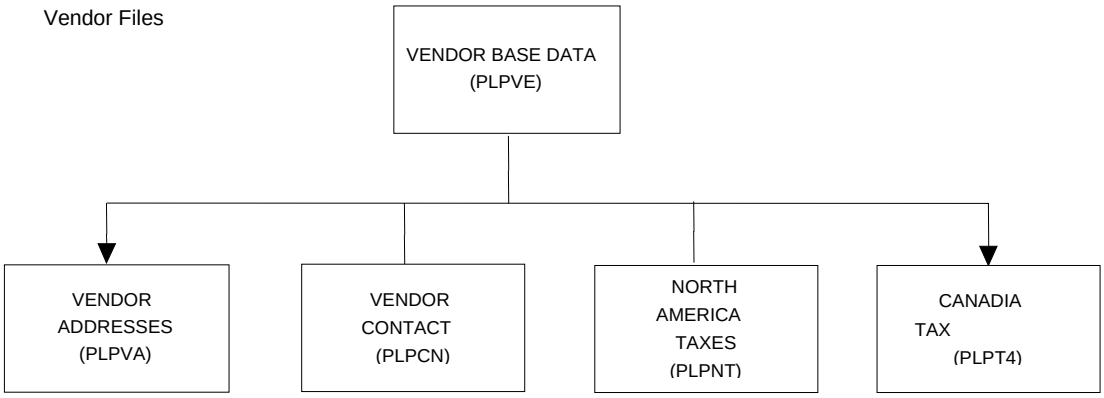


Payments

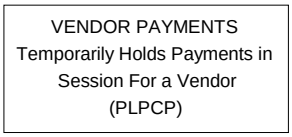


Commonly-Used Infinium PL Files (Continued...)

Vendor Files



Temporary
Payment File



Infinium PL Sample Design 1:
1099 Vendors without a 1099 Code

Report Title: *1099 Vendors without a 1099 Code*		
Library: *PLDBFA*	Library: *PLDBFA*	Library:
Primary File: *PLPNT*	Secondary File: *PLPVE*	Secondary File (if needed):
Fields Needed: *NTTXID*	Fields Needed: *VENAME*	Fields Needed:
NTTXCD	*VEVEND*	
NTVEND		
Join Column: *NTVEND*	Join Column: *VEVEND*	Join Column:

Infinium PL Sample Design 1:
1099 Vendors without a 1099 Code (Continued...)

Report Title: *1099 Vendors without a 1099 Code*						
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Column Heading	*VENDOR NAME*	*VENDOR ID*	*VENDOR FED TAX ID*	*1099*		
Field Names	*VENAME*	*VEVEND*	*NTTXID*	*NTTXCD*	*NTVEND*	
Libraries	*PLDBFA*	*PLDBFA*	*PLDBFA*	*PLDBFA*	*PLDBFA*	
File	*PLPVE*	*PLPVE*	*PLPNT*	*PLPNT*	*PLPNT*	
Derived Column						
Calculations						
Result String						
Format Option	*PRINT*	*PRINT*	*PRINT*	*PRINT*	*NO PRINT*	
Selection Criteria				*EQ (blank)*		
Group/ Sort	*LINE BREAK/ 01 A*					
Join Column		*5*			*2*	

```
QYIREPORT   QYTOUTP     PLT99                      1099 VENDORS WITHOUT A 1099 CODE                      Page    1
10/06/94    10:55:12                                                                                     AM2000

VENDOR NAME                   VENDOR ID   VENDOR FED TAX ID   1099
============================  ==========  ==================  =====
International Copiers         IC
John Michael                  JMB
K2 Ski Co. Inc.               K2          1214

------------------------------------------------------------------------------
Total records selected in report. . .:    03

                                     **********          End of Report          **********
```

Infinium PL Sample Design 2:
Paid Invoices Report by Vendor

Report Title: *Paid Invoices Report by Vendor*		
Library: *PLDBFA*	Library: *PLDBFA*	Library:
Primary File: *PLPPV*	Secondary File: *PLPVE*	Secondary File (if needed):
Fields Needed: *PVINVN*	Fields Needed: *VENAME*	Fields Needed:
PVVECO	*VEVEND*	
PVIREF		
PVPREF		
PVAREL		
PVADTL		
PVAPMT		
PVVODH		
PVVEND		
Join Column: *PVVEND*	Join Column: *VEVEND*	Join Column:

Note: Use of the PVAREL, PVADTL, and PVAPMT fields means this report presents amounts in bank account currency.

Infinium PL Sample Design 2:
Paid Invoices Report by Vendor (Continued...)

Report Title: *Paid Invoices Report by Vendor*						
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Column Heading	*VENDOR NAME*	*INVOICE NUMBER*	*CMPNY*	*INTRL ID*	*PAYMENT #*	*INV AMNT PAID*
Field Names	*VENAME*	*PVINVN*	*PVVECO*	*PVIREF*	*PVPREF*	*PVAREL*
Libraries	*PLDBFA*	*PLDBFA*	*PLDBFA*	*PLDBFA*	*PLDBFA*	*PLDBFA*
File	*PLPVE*	*PLPPV*	*PLPPV*	*PLPPV*	*PLPPV*	*PLPPV*
Derived Column						
Calculations						
Result String						
Format Option	*PRINT*	*PRINT*	*PRINT*	*PRINT*	*PRINT*	*PRINT/ TOTAL*
Selection Criteria						
Group/ Sort	*PAGE BREAK/ COUNT*	*LINE BREAK/ 02 A*				
Join Column						

Infinium PL Sample Design 2:
Paid Invoices Report by Vendor (Continued...)

Report Title: *Paid Invoices Report by Vendor (Continued...)*						
	Column 7	Column 8	Column 9	Column 10	Column 11	Column 12
Column Heading	*DISCOUNT TAKEN*	*NET PAID AMOUNT*				
Field Names	*PVADTL*	*PVAPMT*	*PVVODH*	*VEVEND*	*PVVEND*	
Libraries	*PLDBFA*	*PLDBFA*	*PLDBFA*	*PLDBFA*	*PLDBFA*	
File	*PLPPV*	*PLPPV*	*PLPPV*	*PLPVE*	*PLPPV*	
Derived Column						
Calculations						
Result String						
Format Option	*PRINT/ TOTAL*	*PRINT/ TOTAL*	*NO PRINT*	*NO PRINT*	*NO PRINT*	
Selection Criteria			*EQ 0*			
Group/ Sort						
Join Column				*11*	*10*	

QYIREPORT QYTOUTP PLPDINV Paid Invoices Report By Vendor Page 1
10/06/94 10:55:12 AM2000

VENDOR NAME	INVOICE NUMBER	CMPNY	INTRNL ID	PAYMENT #	INV AMOUNT PAID	DISCOUNT TAKEN	NET PAID AMOUNT
ACME CORPORATION		VMR	940700010	748	101.93	0.00	101.93
		VMR	940700011	748	101.93	0.00	101.93
		VMR	940700012	748	101.93	0.00	101.93
	BILL OF EXCHANG	VMR	940700008	748	101.93	0.00	101.93
	SELECTED INV FO	VMR	940700009	748	101.93	0.00	101.93
	34242209A	VMR	950200026	7	5435.50	108.71	5326.79
Total					5945.15	108.71	5836.44

VENDOR ACME Corporation . . : 6

Final report totals

Total					5945.15	108.71	5836.44

Total records selected in report. . .: 6

********** End of Report **********

Infinium PL Sample Design 3:
Vendor Payments to Customers with Balances

Report Title: Vendor Payments to Customers with Balances		
Library: S2KPLDBFA	Library: S2KPLDBFA	Library: S2KARDBFB
Primary File: PLPCP	Secondary File: PLPVE	Secondary File: ARPCC
Vendor Payments	Vendor Base Data	Customer Credit
Fields Needed:	Fields Needed:	Fields Needed:
Payment Session (CPSESN)	Payee Name (VENAME)	AR Company (CCCO)
Payee (CPPAYE)	Vendor Number (VEVEND))	AR Customer (CCCUNO)
Net Amount to be Paid (CPA2PY)	AR Company (VEARCO)	Open Items Balance (CCCBAL)
	AR Customer (VECUST)	Unapplied Cash Amount (CCUBAL)
Join Column:	Join Column:	Join Column:
Payee (CPPAYE) to Vendor Number (VEVEND)	AR Company (VEARCO) to AR Company (CCCO)	
	AR Customer (VECUST) to AR Customer (CCCUNO)	

Infinium PL Sample Design 3:
Vendor Payments to Customers with Balances (Continued...)

Report Title: *Vendor Payments to Customers with Balances (Continued...)*						
	Column 1	Column 2	Column 3	Column 4	Column 5	Column 6
Column Heading	*PAYMENT SESSION*	*PAYEE NAME*	*PAYEE*	*VENDOR NUMBER*	*AR CO*	*AR CUSTOMER*
Field Name	*CPSESN*	*VENAME*	*CPPAYE*	*VEVEND*	*VEARCO*	*VECUST*
Library	*S2KPLDBFA*	*S2KPLDBFA*	*S2KPLDBFA*	*S2KPLDBFA*	*S2KPLDBFA*	*S2KPLDBFA*
File	*PLPCP*	*PLPVE*	*PLPCP*	*PLPVE*	*PLPVE*	*PLPVE*
Derived Column						
Calcu-lations						
Result String						
Format Option				*Do Not Print*		
Selection Criteria	*EQ (=) 9*				*GT (>) blank*	*GT (>) blank*
Group and Sort	*Sort = 1 Group Active Print Count*	*Sort = 2*				
Join Column			*4*		*7*	*8*

Infinium PL Sample Design 3:
Vendor Payments to Customers with Balances (Continued...)

Report Title: *Vendor Payments to Customers with Balances (Continued...)*						
	Column 7	Column 8	Column 9	Column 10	Column 11	Column 12
Column Heading	*AR COMPANY*	*CUSTOMER NUMBER*	*PAYMENT AMOUNT*	*OBLIG BALANCE*	*CASH BALANCE*	*OPEN BALANCE*
Field Name	*CCCO*	*CCCUNO*	*CPA2PY*	*CCCBAL*	*CCUBAL*	*Derived Column*
Library	*S2KARDBFB*	*S2KARDBFA*	*S2KPLDBFA*	*S2KARDBFA*	*S2KARDBFA*	*S2KARDBFB*
File	*ARPCC*	*ARPCC*	*PLPCP*	*ARPCC*	*ARPCC*	*ARPCC*
Derived Column						
Calcu-lations						*Col 10 - Col 11*
Result String						
Format Option	*Do Not Print*	*Do Not Print*	*Totals Comma*	*Do Not Print*	*Do Not Print*	*Totals Comma*
Selection Criteria						
Group and Sort						
Join Column						

Infinium PL Sample Design 3:
Vendor Payments to Customers with Balances (Continued...)

Report Title: *Vendor Payments to Customers with Balances (Continued...)*		
	Column 13	Column 14
Column Heading	*OFFSET AMOUNT*	
Field Name	*Derived Column*	
Library	*S2KPLDBFA/S2KARDBFB*	
File	*PLPCP/ARPCC*	
Derived Column	** Yes*	
Calculation	*Col 9 - Col 12*	
Result String		
Selection Criteria	*Totals Comma*	
Selection Criteria		
Group and Sort		
Join Column		

QYIREPORT QYTOUTP PAYMENTS VENDOR PAYMENTS TO CUSTOMERS WITH BALANCES Page 1
5/25/93 12:07:59 AM2000

PAYMENT SESSION	PAYEE NAME	PAYEE	AR CO	AR CUSTOMER	PAYMENT AMOUNT (PL)	OPEN BALANCE (AR)	OFFSET AMOUNT (DIFFERENCE)	
9	C & S Coomputer Supplies	5	001	3000	1,200.00	52,748.24	51,548.24-	
	Eastern electric	10	300	3000	1,695.33	79,822.69	78,127.36-	
	William M. Brown	15	300	1000	354,641.84	295,563.00	59,078.84	
					357,537.17	428,133.93	70,596.76-	Total

PAYMENT SESSION TOTAL 9 . . : 3

.
.
.

QYIREPORT QYTOUTP PAYMENTS VENDOR PAYMENTS TO CUSTOMERS WITH BALANCES Page 2
5/25/93 12:07:59 AM2000

PAYMENT SESSION	PAYEE NAME	PAYEE	AR CO	AR CUSTOMER	PAYMENT AMOUNT (PL)	OPEN BALANCE (AR)	OFFSET AMOUNT (DIFFERENCE)	

Final report totals

					357,537.17	428,133.93	70,596.76-	Total

Total records selected in report. . .: 3

******** End of Report ********

Notes

Appendix I

Printing File/Field Data

This appendix provides information on accessing on-line documentation about Infinium database applications' files and fields.

Understanding the *Documentation* Function

Library XXDOC, where XX is a Infinium system designator, contains technical cross-reference information for the designated Infinium database application. For example, library GLDOC contains technical information about Infinium GL.

If you have access to the Infinium AM Release 2.0 *Documentation* function, you can print data from this library for your reference. For further information about this function, refer to Part 12 of the *Infinium Application Manager Guide to AM*.

The following page provides basic steps for printing the on-line file/field information.

Printing a Documentation File

Follow these steps to print on-line file/field information:

1. Select *Documentation* from the Infinium AM main menu.

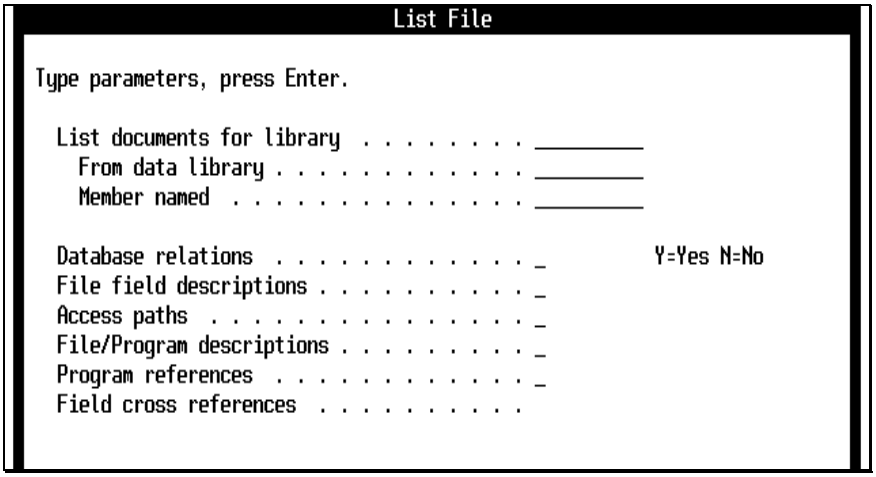


Figure I-1: Documentation function parameters

2. Select *List File* from the list of options. The system displays the fields in Figure I-1.
3. Type the following values in the first three fields.

Field	Value
List documents for library	**xx2000** where xx is a system designator
From data library	**xxDOC** where xx is a system designator
Member named	**xxyyy** where xx is a system designator and yyy identifies the release. Example: **GL090** for Infinium GL Release 9.0.

4. The remaining fields are flag settings that let you determine the degree of detail you want in your report. Type **Y** in the *File/Field* field and any other appropriate fields.
5. Press Enter to submit the job for printing.