

**Star System Solutions  
Pty Ltd**

**Report  
Manager**

**User Manual**

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# About this manual

## Overview

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This manual explains the Report Manager program. This section describes the features of this manual. It is intended to assist the user in gaining the most out of Report Manager, by knowing how to use the manual effectively.

This is the Report Manager manual, which describes and outlines the usage of the system in a manner that will fulfil the business requirements of the company.

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# How to use this manual

## Overview

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**Introduction** This manual has been written to assist in using Report Manager.

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**Access aids** There are various access aids to help find the information required.

- ☞☞ Table of Contents – the listing of the manual’s contents which is located at the front of the manual
  - ☞☞ Topic titles – the major headings on each page, like the heading “How to use this manual” on this page
  - ☞☞ Block labels – the minor headings on each page, like the headings “Access aids” on this page
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# Introduction to the Report Manager

## Overview

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**Introduction** This sections explains the usage of the Report Manager program.

The Report Manager is used to run all reports that have established within the Module Manager program.

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**Preconditions** The report itself and report selections must be established in the required modules.

Please see either the Module Manager On-Line Help or the Module Manager user manual for further information regarding reports and selections.

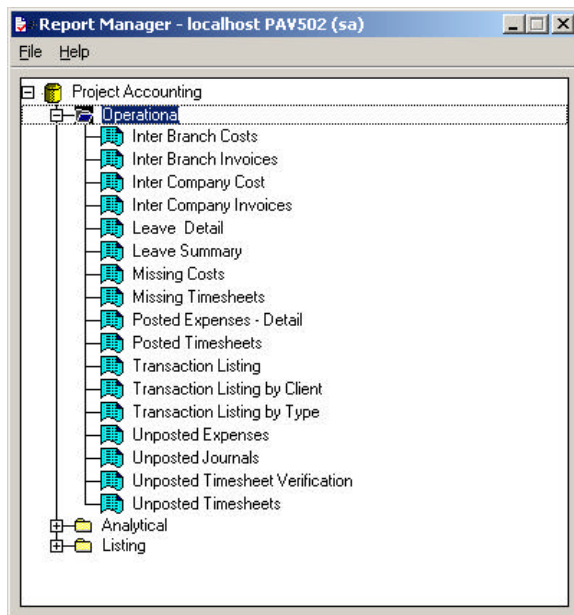
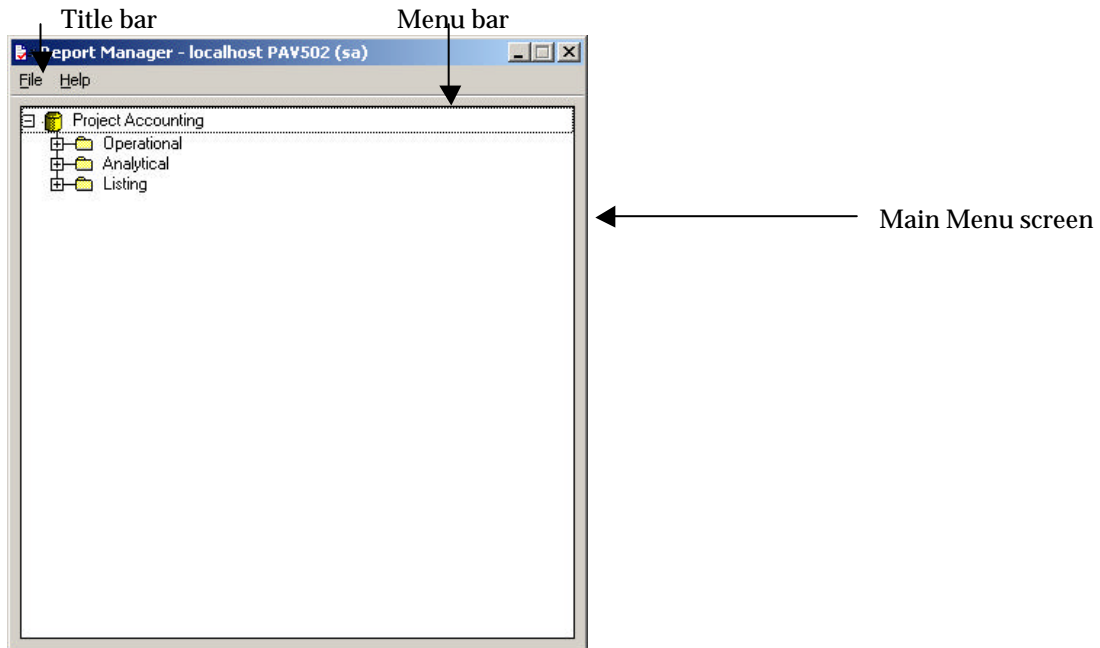
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# Main Menu

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The Report Manager – Main menu. The key functions and screen buttons are explained in the following screen.

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Example of a Report Manager Main Menu screen with one report menu group expanded for the Module called 'Project Accounting'

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Title bar – displays the screen title.

Menu bar – displays the following list of menu options. (Usually pull down menu)

☞☞ **F**ile menu – displays general menu options used to access the Printer setup and **E**xit

☞☞ **H**elp menu – displays commands used to access the online Help and associated functions, and a Host system information dialogue box.

☞☞ The Main screen lists all of the report menus available for the selected Module (program) the user can then expand the relevant report menu group to reveal the available reports and then double click the required report in order to run the report.

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## Moving around

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**Introduction** The Report Manager provides a variety of navigation tools that will assist in the maneuvering function around the system quickly and easily, including:

- ☞ mouse and keyboard
  - ☞ data entry
  - ☞ common buttons
- 

*Mouse and keyboard* – the user can use the keyboard to perform the same actions as the mouse. Some important keyboard actions are described below:

<b>Keys</b>	<b>Description</b>
Hot keys	a hot key is a combination of a and the letter Underlined in a button or menu title. Once actioned, a hot key will display a menu or screen. Example: a + <u>F</u> will display the <u>F</u> ile menu;
	! displays the online Help
	a t toggles between Report Manager and other open Windows application

*Data entry* – data can be entered into the field on a screen by two different ways; by direct entry or from a zoom list.

- ☞ Direct entry – to enter text into a field place the cursor inside the field and type in the data.
  - ☞ Zoom list – this is a zoom list button .  When selected, it displays a list of values, select a value and it will display into the selected field.
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*Common button* – below is a list of the most commonly used buttons.

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Zoom list button - When selected, it displays a list of values, select a value and it will display into the selected field.



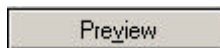
Module / Program which contains the individual reports available to be run.



Report Menu Group within the selected Module / Program.



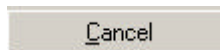
Individual Report Menu item within a Report Menu Group.



Preview button - When selected, prints the selected report to the screen.



Print button - When selected, prints the selected report to the printer.



Cancel button - When selected, closes the report screen without printing the report and moves back to the Report Manager main screen.

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## How to access Report Manager

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**Introduction** The user access, which is called a “log on” controls the user’s ability to access the screens and perform functions. The Report Manager will establish the user access, defined by the user’s requirements and business functions.

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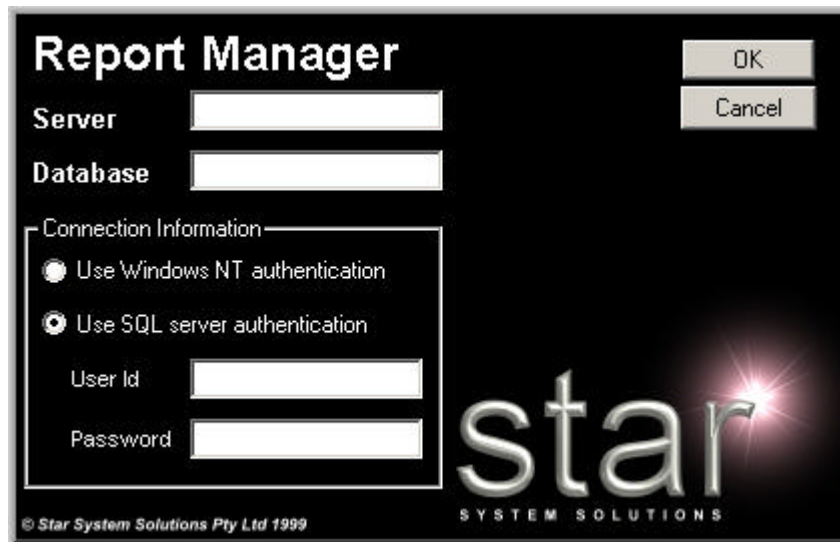
**Conditions** The Report Manager enables users to process reports.

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**Procedure** How to log on:

From Program Manager:

1. Double click on the Report Manager icon, or Menu option.
2. Type the Server name



3. Press tab to move between fields

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- 
4. Type the Database name into the Database field
  5. Select the type of Authentication required for Login (Windows NT or SQL Server.)
  6. If SQL server Authentication was selected - Enter the user Id into the User Id field and press t
  7. Type the password into the Password field.
  8. Select the OK button

**Result:** You have logged onto Report Manager using SQL Server Authentication.

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9. If Windows NT Authentication was selected - Select the OK button

**Result:** You have logged onto Report Manager using Windows NT Authentication.

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## How to exit the Report Manager

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**Conditions** The user must be logged in to the Report Manager, before the log off function can be performed.

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**Procedure** How to log off:

From any Report Manager screen, select one of the following options:

☞ ☞ Exit from the File menu or press  $\alpha$  + F and X

☞ ☞ Double r click on the Control box (top left hand corner icon)

☞ ☞ Single r click the Control box and select Close.

☞ ☞ r click on X.

☞ ☞ Press  $\alpha$  + \$ and then the letter X (Exit).

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# Using Report Manager



## Running a report

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**Introduction** This section explains how to run a report from within Report Manager.

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**Procedure** To run a report from the Report Manager Main Menu screen:

1. Expand the required module / program by selecting the  symbol beside the module icon.
2. Expand the relevant menu item group that holds the report that you want to run by selecting the  symbol beside the Report Menu group.
3. Double click on the individual report item to be run.
4. Enter the required / desired report selection criteria.
5. Do you want to preview the report?  
?? If yes, click on the preview button.

**Result:** The selected report is printed to the computer screen.

?? If no, go to step 6.

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6. Do you want to print the report?  
?? If yes, click the print button.

**Result:** The selected report is printed to the printer.

?? If no, go to step 7.

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7. Click on the cancel button to close the screen without printing the selected report.

**Result:** The report selection screen closes and the report is not printed.

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## Change Password

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**Introduction** Passwords from the database (Oracle or SQL Server) provide security for the Host system application. Change **P**assword allows the user to change the password in the database and therefore within The host system. This should be done on a regular basis as part of a good security policy. This should be done on a regular basis as part of a good security policy.  
This section explains how to change your SQL Server login password from within the Report Manager screen.

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**Preconditions** The change password function will affect the password of the user ID currently logged into Report Manager.

Please note that changing the SQL Server login will affect this change on the password of that User ID login for all Star products such as Module Manager and Project Accounting.

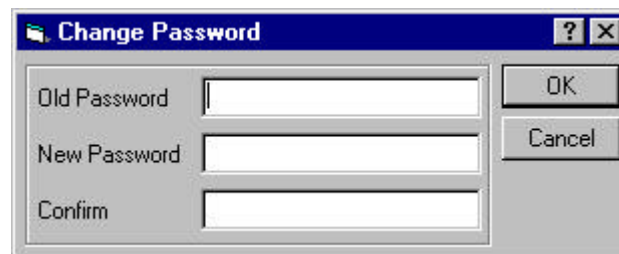
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**Procedure** To change the user ID SQL Server password from the Report Manager Main menu screen:

1. Select **C**hange Password from the File menu.
  2. Type the old password in the Old Password field and press **t** .
  3. Type the new password in the New Password field and press **t** .
  4. Retype the new password in the Confirm field.
- 

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- 
5. Click on OK



**Result:** The SQL Server login password has been changed for the user ID that is currently logged into the Report Manager Program.

Please Note: This password has now been changed for that User ID for all Star products.

**Note:** If you forget the password, notify the Database Administrator to reset the password.

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# Appendix A

## Crystal Reporting Standards

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**Introduction**      The following specifications are those used in the development of the standard Crystal reports. It is suggested that these standards for layout and presentation are used in the future development of reports to provide consistency for all reporting.

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**Page Layout**      A4, 1.5cm border all edges  
Portrait if possible  
All fonts Arial (Western)  
All headings left aligned and leading capitals  
All numbers right aligned

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### **Presentation:**

Report title                      16pt Bold  
Parameters below title        10pt Plain

#### **Column headings:**

Top Line                        1.5 pt  
Headings                        8 pt Plain  
Bottom Line                    0.5 pt

#### **Body of report:**

Subheadings                    8pt Bold  
Details                         8pt Plain  
Extra Details                  8pt Plain or Italic  
Separating lines between rows    Hairline

#### **Footer:**

Line above                      1 pt  
Left side                        Report printed: Date Time (8 pt plain.)  
Middle                            Report Name v 1.0 (PS date mod)  
                                          (8 pt Italic)  
Right                              Page N of M  
End of Report  
Centred                         END OF REPORT – (10pt Bold  
                                          Uppercase)

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## Example of a Report

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Report Header

<b>Report Heading</b> You have chosen lots of selection criteria			<b>Ledger Name</b>
Column Heading 1	Heading 2	Heading 3	And so on as headings are required.
Subheading			
Details More Details			
Details More Details			
Subheading			
Details More Details			
And so on as sub headings and details are required.			
<b>End of Report</b>			
Report Printed: 01 May 2001 10.22 am	Report Name: V 5.x	Page 1 of 1	

Report Footer

Body of the Report

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## Trouble Shooting

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### **1: The report will not print:**

1. Check that the correct path to the Crystal report files is set within the Module Manager Parameters.
2. Ensure that the current report files have been loaded.
3. Ensure that the report lists have been imported using the Module Manager 'Tools' menu item.

### **2: The report does not give me the information that I expected:**

Check that the correct selection criteria have been chosen.  
(Please Note: on some reports you may need to scroll downwards on the report selection screen to view all of the available selection criteria prior to running the report.)

### **3: The existing reports do not give me the information that I want:**

Have a customised report written using Crystal that provides the information required in the correct format and add it to the Report Manager menu.

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# Glossary

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**Body of report** – Middle part of report – providing data and information requested when the report was run.

**Crystal** – Seagate Crystal Report Writer.

**Footer**– Bottom lines of the report – providing general report information

**Header** – Top lines of the report – providing report headings.

**Module** – Star program database tables that the report is accessing for the report.

**Module Manager**– Star program used to assist with the configuration of reports.

**Preview** – To view a report to the computer screen.

**Print** – The output the report to a selected printer.

**Selection** – The report selection criteria as defined within the individual report and within Module Manager.

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