



Robot Reports
7
**Getting Started
Guide**

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■ Introduction	Robot Reports—The Total Solution For Report Output.....5
	How Robot Reports Works9
	Paper Reduction Program13
	Steps to a Paperless Environment.....14
■ Report Set Components	Setting Up Robot Reports15
	Report Set Components17
	Setting System Defaults19
	Setting Up Recipients21
	Robot GUIDE for Automated Setup of Report Sets23
	REPOUTQMON Command27
■ Advanced Report Setup	Quick Tour 1: Setting Up Reports Using the ROBOT Method29
	Quick Tour 2: Changing Distributions for a Report34
	Quick Tour 3: Viewing a Report39
	Quick Tour 4: Creating Multiple Bursting Instructions with Banner Pages.....42
	Quick Tour 5: Creating Bursting Instructions with *REMAINDER.....45
	Quick Tour 6: Creating Bursting Instructions with Two Compare Values47
	Quick Tour 7: Creating a Report Segment Using OPAL48
	Quick Tour 8: Creating Exception Distribution.....51
	Quick Tour 9: Creating Robot Schedule Date Objects54
■ Daily Operations	Report Bundling—REPBUNDLE55

Notes:

■ Robot Reports— The Total Solution For Report Output

No other area of operations is more costly or labor intensive than managing report output on the IBM i. As a result, the payback from automating these duties is big. Report management includes many tasks—running and printing reports, bursting and sorting the resulting stacks of paper, and delivering the reports to the recipients. And, report management doesn't end there. Report recipients must be able to reviewing reports, need to store them. When they need to look up historical information, they have to find and retrieve reports.

Like other Fortra products, Robot Reports is designed to be a total solution to a specific problem—the high cost of report management.

■ Many Report Viewing Features

Robot Reports offers elegant report viewing features that make users want to switch to report viewing. There's no need for special equipment—Robot Reports works on any workstation. Report recipients can view their list of reports using either a PC or a web browser interface.

- Authorized users can reformat their reports by eliminating, moving, or copying report columns and save their new view definitions as report views. These report views can be secured so that access to specific columns is restricted to authorized users.
- All users can freeze page headings and columns during windowing and scrolling just like Lotus™ or Excel™ spreadsheets. They can also use scan functions to find important items quickly. Report information that exceeds thresholds can be highlighted in color. These features will have your users moving toward a paperless office in no time.
- Robot Reports lets users create Report Notes. Users can add useful information to a report. A user can set up a note for their eyes only (bookmark notes), for everyone who receives the report, or for a list of recipients.
- The Robot Reports Administrator can convert report views to Portable Document Format (PDF), to be viewed and printed by any computer that has the free Adobe Acrobat Reader installed. They can also convert report views into HyperText Markup Language (HTML) to use on the Internet.

■ Automating Operator Report Duties

Virtually any procedure the operator performs in response to information in a report can be done automatically by Robot Reports.

- Robot Reports can burst reports into report segments. It makes new reports from old ones by including only the lines or pages that a recipient needs. For example, Robot Reports can burst a report into a segment whenever a department name changes, or it can create a report segment that summarizes report results by reporting only the lines containing totals.
- Robot Reports can secure a report segment so that access to certain lines or pages is restricted to authorized users. Robot Reports can even use Robot Alert to page experts if reports contain information that needs clarification or a response.
- Robot Reports can execute commands, send messages, and signal prerequisite job completion to Robot Schedule in reaction to the information in a report. For example, it can start another job in a closing procedure when balancing report totals agree. All these procedures are easy to code using our powerful OPERator Assistance Language (OPAL).

■ Automatic Report Bundling And Distribution

If you have problems with sorting, delivering, or losing reports, Robot Reports is the package for you. Robot Reports automatically bundles all of the reports (including report segments) into a recipient packet. Robot Reports even generates a packet cover sheet with an index listing the reports in the packet, the number of pages in each report, and the packet page numbers.

Robot Reports can print a packet at any printer in your IBM i network, including laser printers with special print command requirements. These printers are supported without you having to change your report programs.

Robot Reports offers you several choices for your report formats. You can convert a report to:

- Column-delimited format and place it in a directory for downloading to a workstation.
- A text file and save it to a workstation.
- A microfiche-format file to be output as microfiche.
- Portable Document Format (PDF), to be viewed and printed by any computer that has the free Adobe Acrobat Reader installed. You can convert reports using either the PDF option or the TRANSFORM option (you must have Robot Transform installed).

You can use the TRANSFORM option to create customized PDF files containing embedded graphics such as watermarks or logos, with complete PDF functionality, including full text searching. For example, you can re-create order forms and other company information perfectly.

- HTML (HyperText Markup Language) to use on the Internet.

■ Thorough Report Archiving

Robot Reports can archive any IBM i spooled file. It lets you have a different archive strategy for each report. You tell Robot Reports how many days you want the report to remain in each type of archive and Robot Reports does the rest. You can store reports online for instant access. You can place them in short-term storage using a disk drive, an optical disk drive, a dedicated tape drive, or a tape librarian. Or, you can store them long term using tape to be moved off-site.

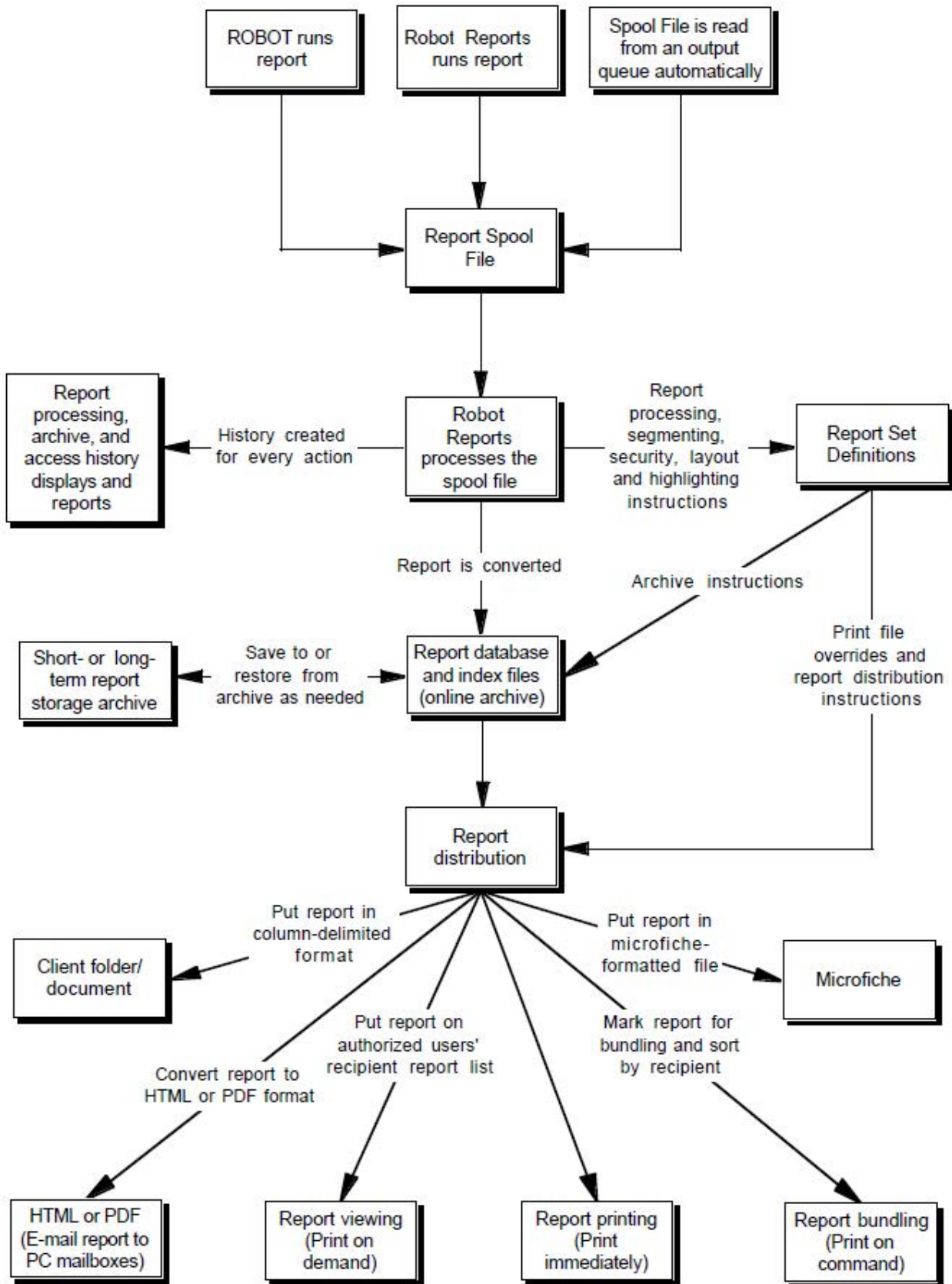
The report archive history shows the archive status of the report and on which tape volumes it is stored. If a user needs a report from short-term storage, they can restore it by pressing a function key.

■ Complete Report History

Robot Reports provides a complete history of every report it processes, whether it is printed or archived on the IBM i. It also provides the status of every report currently being processed. And, if report processing is interrupted, you can restart it without rerunning the report.

The report access history display tells who viewed or printed the report, including the date and time of access. You can use the report access history to review report usage and detect security violations. You can display or print the Robot Reports history at any time.

How Robot Reports Works



■ How Robot Reports Works

The diagram on the preceding page outlines how Robot Reports manages reports on your IBM i. It shows the relationships between the files and processes of the Robot Reports system (Each process is explained in greater detail in the Robot Reports Administrator Guide.)

■ Three Ways To Create Report Spool Files For Robot Reports

The most commonly-used method to create a report spooled file is to run your report program normally and divert the output to an output queue that is not attached to a printer. Robot Reports can monitor this output queue and look for spooled files that match the information in its report sets. When it finds a match, it processes the spooled file. Robot Reports can process almost any spooled file on the IBM i, no matter what its source.

The second easy way to create your report spooled file is to use Robot Schedule, our job scheduler. Robot Schedule takes care of the overrides and diverts the spooled file to Robot Reports for processing.

The third method is to use the **REPRUNSET** command to create your report spooled file. This command runs your report program and has Robot Reports process the resulting spooled files.

■ Robot Reports Processes The Spooled File

A report set contains the instructions Robot Reports needs to process spooled files and print the reports. Using report set instructions, Robot Reports puts the spooled file data into secured IBM i objects that also form the online archive. Any report segmentation and line highlighting are performed at this time.

A bursting instruction distributes the pages or sections of a report that should be output to give users just the information they need. OPAL Segments distribute lines and pages of a report to recipients. Comparison information is used to burst the report into multiple segments, and distribution is set up for each segment.

Robot Reports can highlight report lines in color (26 colors are available) based on the data in the report to spotlight items needing management action or other attention. You can create OPAL code to tell Robot Reports the rules you want to use to highlight lines.

Report segment viewing and printing security authorizations are contained in the report set. This security allows authorized users to see the entire report, or only certain lines or pages.

A report processing history record is created for each spooled file processed. This history can be displayed or printed at any time. The processing status indicator is used to restart the processing if it is interrupted.

■ The Reports Are Distributed

Robot Reports offers many output options:

- Print copies immediately with a report banner page showing how many copies each person gets. Robot Reports supports all kinds of laser printers.
- Convert a report to a microfiche-formatted file to output as microfiche.
- Convert a report to column-delimited format and distribute it to a directory or an IBM i file to download into a spreadsheet. You can also email these reports to a PC mailbox automatically if you have Robot Alert, Fortra's IBM i messaging software.
- Convert the report to PDF format, to be viewed and printed by any computer that has the free Adobe Acrobat Reader installed. You can convert reports using either the PDF option or the Transform option (you must have Robot Transform installed).
Use the Transform option to create customized PDF files containing embedded graphics such as watermarks or logos, with complete PDF functionality, including full text searching.
- Convert a report to HTML format for easy online and web access. You can email a PDF or HTML report to a PC automatically if you have Robot Alert.
- Bundle all of the night's reports for a recipient into an indexed packet and print it at the recipient's chosen printer.
- Archive the report and add it to each recipient's report list for later viewing or printing.

Or, use all of the above on the same report—just create a distribution record for each type of output you want. Create distribution records easily by picking from a list of recipients or using a distribution list (a list of recipients who commonly receive the same reports).

■ Report Bundling

Report bundling replaces the operator duties of bursting all of the night's report copies and sorting them by recipient for delivery in the morning.

If the distribution instructions specify to bundle the report into a recipient's packet, the recipient's report record is marked as ready for bundling (rather than printing the report). When the **REPBUNDLE** command is executed early in the morning, all of the reports marked for bundling are placed on the output queues in recipient order. This command bundles all of the reports that were run since the last time the command was executed.

■ Report Viewing

Each recipient's report packet can have a packet banner page that contains an index of the reports in the packet plus the report page numbers and packet page number.

Recipients can access a list of reports—reports they have been authorized to view or print—from their workstations. The PC and Web Portal interfaces give Robot Reports the familiar feel of PC applications. From their report list, users can choose a report title and see all of the archived report versions available to them. If the report is online, they can view the information instantly.

- They can print the pages they need to any printer.
- They can print the report in its original format or a report view format.
- They can add, change, remove, or print report notes.

If the report is not online, the recipient (or an operator) can retrieve it quickly from short-term or long-term storage by pressing a function key.

With Robot Reports you can reformat a report into report views. A report view can have highlighting instructions and recipients can create as many views as they want by freezing headings, and freezing, excluding, or moving columns.

The report access history display shows who viewed or printed the report, including the date and time of access. You can use this history review report usage and detect security violations.

■ Report Archiving

Robot Reports can use any save media supported by IBM's save commands and supports three stages of report archive:

- **Instant Online Storage**

The report is stored online in a normal data library for instant report viewing.

- **Short-term Storage**

The report is moved from an online library and placed on a short-term save device that can do unattended restoration. This device can be a disk drive, an Auxiliary Storage Pool (ASP), an optical disk drive, a dedicated tape drive, or a tape librarian.

- **Long-term Storage**

The report is shifted to a long-term save device, usually a separate tape or disk dedicated for archiving reports. These tapes or optical disks typically are kept for a year or more.

■ Report Archiving (cont.)

Robot Reports moves reports from one archive stage to another automatically, according to your archive plan, when you execute the **REPARCHIVE** command. It keeps an archive history record for each report so you stay informed and in control.

Less sophisticated archive software prevents you from viewing old versions of a report when the report layout changes. This is not a problem with Robot Reports. The report, its search indexes, and all the report viewing formats are archived and restored together. You can look at any version of the report, no matter how often its layout changes.

■ The Paper Habit Is Hard To Break

Paper reports are comforting. You can write on them. You can carry them home with you. You can copy them. But printed reports have some big disadvantages:

- They clutter your desk.
- They can be a security issue when left lying around.
- They are hard to find in stacks of paper.
- They can give you paper cuts and dirty hands.
- They are very, very expensive.

■ Paper Costs More Than You Think

A paper reduction program can reduce a company's operating costs dramatically. A large corporation conducted a study that showed it cost 10 cents a page to print their reports. The items totaled included material costs (paper, printers, maintenance, supplies, floor space and storage cabinets for paper and reports, paper disposal costs) and labor costs (off-shift operators to watch printers; operators to sort, collate, and deliver reports; employee time to file current reports and retrieve prior ones; labor to dispose of paper).

Obviously, every page viewed on a workstation rather than printed can save money. For example, if your company prints 150,000 pages a month and converts half of its reports to viewing, it could save \$90,000 a year.

■ Converting to a Paperless Environment

One of the hardest things to change is people's behavior. Before you can convert to a paperless environment, users must be convinced that there are more advantages to changing than there are disadvantages. The obvious advantage is the big cost savings. To guide users to a paperless environment, you must show them that electronic viewing is easier than looking at paper, and that viewing reports can increase their productivity.

■ The Key to a Paperless Environment

To implement a paperless environment, you need a powerful report output management program. That's where Robot Reports comes in. Robot Reports provides the control you need. Report viewing eliminates the need for printed reports. Report archiving on the IBM i, rather than on paper, stores information contained in the reports in an easily-accessible form. Report segmentation displays or prints only the lines or pages needed, rather than the entire report. When you use all of these features, the benefits really begin to materialize.

■ Steps to a Paperless Environment

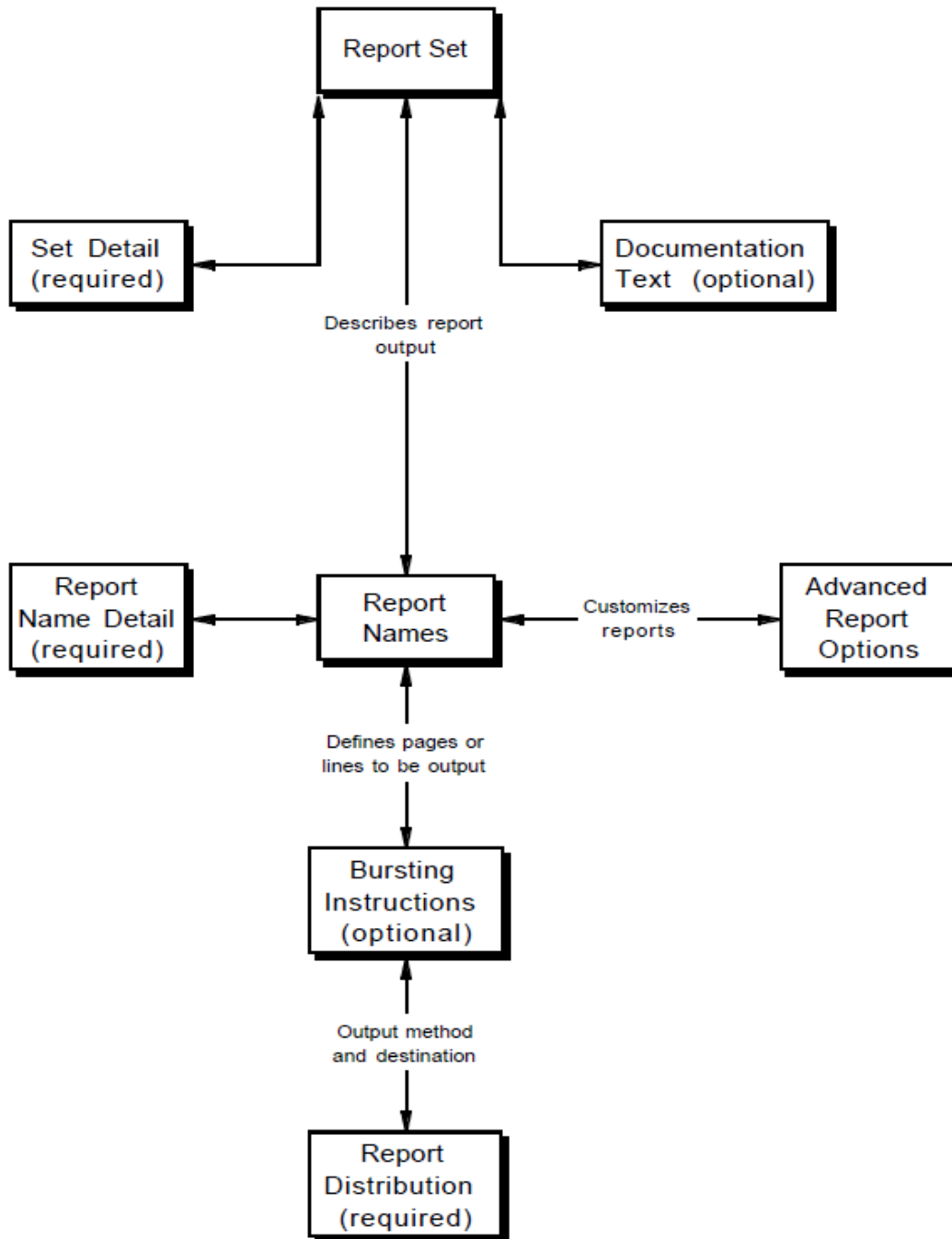
Although you can't force your users into report viewing, you can ease them into the paperless revolution by using the following steps:

1. Continue to print reports while archiving them for viewing.
2. Train users on how to view and format their reports so they become familiar with the advantages of online viewing.
3. Ask them often if they are ready to give up their printed reports. When some users indicate they are ready to switch, stop printing their reports.
4. Make users print their own reports on departmental printers. They will realize what a nuisance paper reports are to print and retrieve.
5. Begin using a job accounting and chargeback system to charge users for every page they print so they see how much each printed report costs. Money is a great motivator to move people to paperless reports. You can use the chargeback system to measure your progress—are you printing fewer pages now than you did last month?

The road to a paperless environment may not always be smooth, but Robot Reports can make the transition well worth the effort. The result—big cost savings and happier, more productive employees.

Setting Up Robot Reports

Report Set Components



■ Report Set Components

Robot Reports needs to know certain things to be able to process your reports. All the components necessary to define a report so that Robot Reports can process it are called a report set.

The diagram on the previous page shows the components of the report set. The report set is the umbrella entity in Robot Reports. Each time you run Robot Reports, you create a new version of the report that is placed in archive for the archive period.

<u>Item</u>	<u>Description</u>
Report Set Detail	Gives Robot Reports basic report identification information and report processing options.
Report Set Documentation Text Panel	Lets you enter text to document the purpose of the report set, or how to use it.
Report Names	The individual reports that your report program creates. There is no limit to the number of report names from one program that Robot Reports can process.
Report Name Detail	Contains spooled file comparison information that Robot Reports uses to identify which spooled files to process.
Advanced Report Options	Allow you to perform advanced Robot Reports functions, including print file overrides, report indexes, report views, and segment OPAL.
Bursting Instructions	The pages, or sections, that will be included in the report segment. Bursting instructions also let you define a banner page for each report segment.
Report Distributions	Processes, distributes, and archives the reports according to the instructions you provide in the report set components.

■ Setting Up Robot Reports

The following checklist will help you make sure you have defined the basic components that Robot Reports needs to process your reports successfully. This is a list of the *minimum* components required. Depending on the choices you make as you define your report sets, you may need additional components. The pages that follow cover how to define these components.

For overall Robot Reports operation:

- Install the product.
- Set system defaults.
- Modify recipients (as needed).

For each Robot Reports report set:

- Define the report set.
- Define report names.
- Define bursting instructions (optional).
- Define report distribution.

■ Making Robot Reports Run

After you have defined the components for Robot Reports, you want to process a report. How a report is run depends on the method you selected for the report set on the Report Set panel (if you use automated setup, all of the report sets created use the SEARCH method).

<u>Method</u>	<u>Description</u>
SEARCH	If you use automated setup, it automatically defines the report set (you can change the defaults) and you set up the monitoring of the specified output queue. Robot Reports processes the appropriate spooled files as soon as they appear in the queue in a ready status.
ROBOT	If you're currently running your report program using Robot Schedule, you can link your new report set to an existing Robot Schedule job (described in Quick Tour 1). Your reports process automatically using the Schedule you defined in Robot Schedule.
EXECUTE	When you select the EXECUTE method of report processing on the Report Set panel, you must specify a command to run the report program. Later, when you use the REPRUNSET command—from a command line, in your own program, or in your application menu— Robot Reports processes the report.

Setting System Defaults

Follow the installation instructions provided with Robot Reports. After Robot Reports has been installed, you must define your system defaults and define the report sets you will use. You can also set up recipients and distribution lists.

```

REP290          Robot REPORTS Main Menu          15:01:23
R07M721200416

                1. Report Sets Menu
                2. Recipient and Distribution List Menu
                3. Report History Menu
                4. Control Menu
                5. Administrative Reports
                6. System Setup Menu
                7. Product Master Menu

                Select Option:  _

F3=Exit      F21=System Command

(C)Fortra, LLC and its group of companies
    
```

```

REP294          System Setup Menu              13:22:06

                1. System Defaults
                2. HFS Volume Group Maintenance
                3. Maintain Secured Objects

                Select Option:  1

F3=Exit      F12=Previous      F21=System Command
    
```

```

REP202R        System Defaults                13:22:25

Robot/SAVE Options:
Use Robot/SAVE for Archive . . . : Y (Y=Yes, N=No)

Short Term Storage Options:
Save Device Code . . . . . : DISK (F4=Prompt)
Submit Restoration . . . . . : Y (Y=Yes, N=No)
ASP Number for Disk . . . . . : _

Long Term Storage Options:
Save Device Code . . . . . : TAPE (F4=Prompt)
Submit Restoration . . . . . : Y (Y=Yes, N=No)
Save Device Name . . . . . : TAP01

Other Options:
Default OPAL Owner . . . . . : RBTUSER Use Security? . . . . . : Y (Y, N)
Job Queue for Restoration: QBATCH Job Queue Library . . . : QGPL
Directory . . . . . :

F3=Exit      F4=Prompt      F12=Previous      F22=Preceding Opt      F23=Prev Options
    
```

1. Enter the following command to display the Robot Reports Main Menu:

RBTREPLIB/REP

2. On the Robot Reports Main Menu, select **option 6**, System Setup Menu.

3. Select **option 1** on the System Setup Menu to display the System Defaults panel.

4. Use the first System Defaults panel to enter storage information for the short- and long-term archiving of your reports. If you aren't using Robot Save for archiving, enter the type of save device used for short-term and long-term storage. You must indicate whether Robot Reports should restore the report immediately or submit it to batch.

Press Page Down to continue.

Setting System Defaults

```
REP202B      System Defaults      14:01:48

Values:
  Allow *STANDARD View OPAL . . . . . : N (Y=Yes, N=No)
  Report viewing scan limit . . . . . : 6000

Archive Options:
  Unload Tape after Archive . . . . . : N (Y=Yes, N=No)
  Display Archive Delete Confirm Window. : Y (Y=Yes, N=No)

Restoration Options:
  Unload Tape after Restore . . . . . : N (Y=Yes, N=No)

Print Options:
  Allow edit of Index Print page range . : Y (Y=Yes, N=No)
  Hold spool file . . . . . : Y (Y=Yes, N=No)

                                         More...
F3=Exit   F4=Prompt   F12=Previous   F22=Preceding Opt   F23=Prev Options
```

```
REP202C      System Defaults      16:47:05

Report E-Mail Distribution Option: R (A=Robot/ALERT, R=Recipient E-mail)

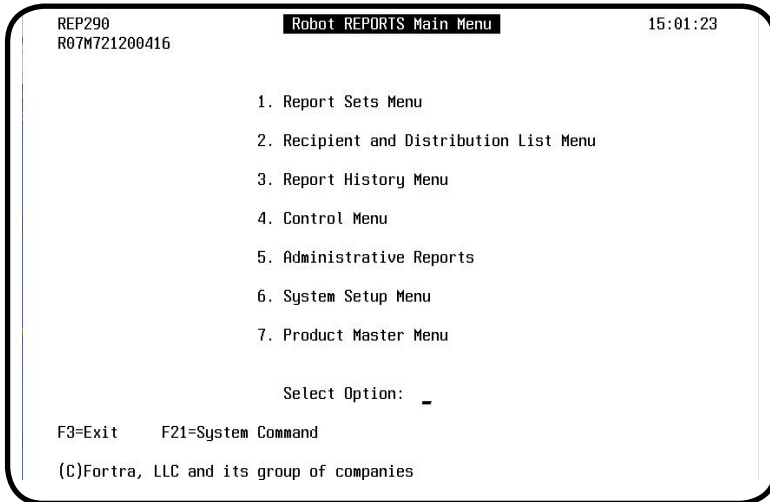
Robot/ALERT E-Mail Options:
  Robot/ALERT Default device . . : ACCT (F4=Prompt)

                                         Bottom
F3=Exit   F4=Prompt   F12=Previous   F22=Preceding Opt   F23=Prev Options
```

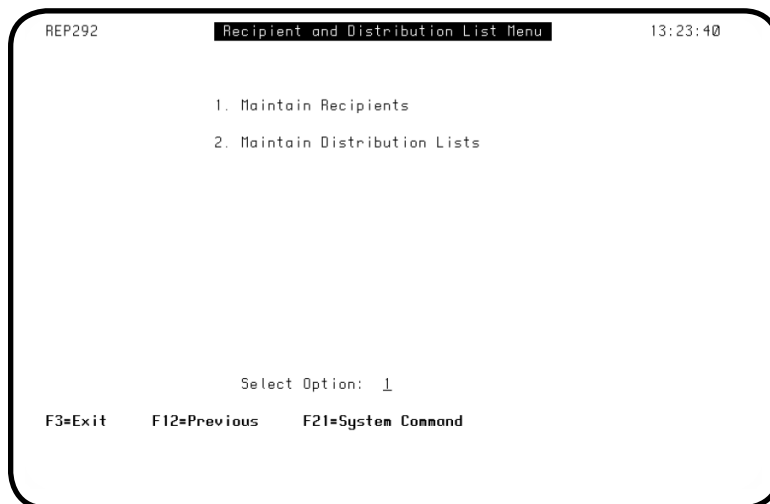
5. Use the second System Defaults panel to customize the *STANDARD reports view, set the line limit for report scans, unload tapes automatically after archiving or restoration, display a confirmation window before deleting an archived report, edit the print index range, or hold a spooled file in the output queue. After you have specified your choices, press Page Down to continue. For more information, refer to the *Robot Reports Administrator Guide*.
6. Use the third System Defaults panel if you want to distribute your reports using Robot Alert. You can email IBM i reports to PC mailboxes using Robot Alert, Fortra's automated paging and email software. You must have Robot Alert installed and a directory on the IBM i where you store reports to be emailed. For more information, refer to the *Robot Reports Administrator Guide*.

Setting Up Recipients

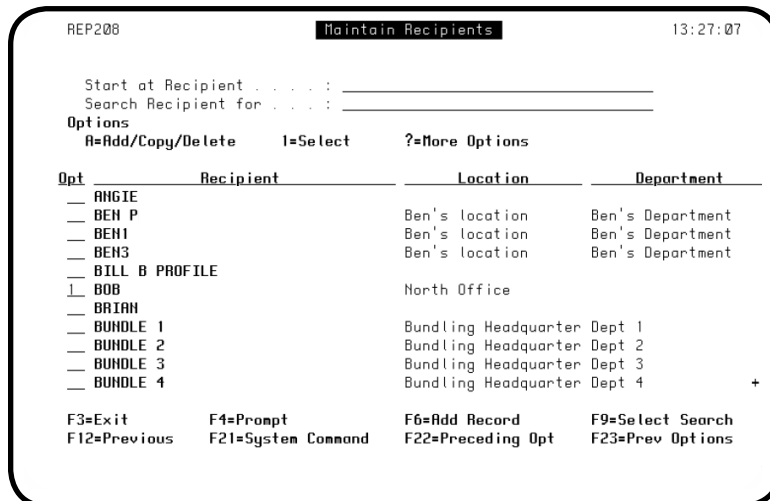
Recipients are defined as all the individuals who are allowed to view or receive report output. When you install Robot Reports, the installation procedure creates a recipient record from all the valid user profiles on the system. You can edit the recipient information.



1. On the Robot Reports Main Menu, select **option 2** to display the Recipient and Distribution List Menu.



2. Select **option 1** on the Recipient and Distribution List Menu. This displays the Maintain Recipients panel.



3. The Maintain Recipients panel lists all the recipients that were defined to Robot Reports at installation. To edit a recipient profile, enter a **1** in the Opt column next to the recipient name. This displays the Recipient panel, on which you can modify the information for the recipient.

If you need to add additional recipients later, simply press **F6**.

Setting Up Recipients

REP227 Recipient 13:26:20

Recipient Information:
 Name : BOB
 Title : SALES REPRESENTATIVE
 User Profile : BOB (F4=Prompt)

Recipient Address:
 Location : North Office
 Department :
 Address : 210 Baker Technology Plaza

Client Target
 Directory : MONTHLY SALES

Report Processing Notification:
 Robot/ALERT Device Name: BND2DEV (F4=Prompt)

F3=Exit F4=Prompt F6=Add/Copy/Delete
 F12=Previous F21=System Command F22=Preceding Opt F23=Prev Options

- The Recipient panel is already filled in with the name and user profile of the recipient. Restrictions on report access are based on the user profile. You can fill in the recipient's title and optional address information. If you supply an address and choose to print a banner page, the address will appear on the banner page to aid in delivering printed reports.

If the recipient will receive reports with the output code of Client (C) for downloading, enter the name of the directory on the IBM i to receive the report distribution.

REP208 Maintain Recipients 13:27:07

Start at Recipient :
 Search Recipient for :

Options
 A=Add/Copy/Delete I=Select ?=More Options

Opt	Recipient	Location	Department
1	ANGIE		
—	BEN	Ben's location	Ben's Department
—	BEN1	Ben's location	Ben's Department
—	BEN3	Ben's location	Ben's Department
—	BILL B PROFILE		
—	BOB	North Office	
—	BRIAN		
—	BUNDLE 1	Bundling Headquarter	Dept 1
—	BUNDLE 2	Bundling Headquarter	Dept 2
—	BUNDLE 3	Bundling Headquarter	Dept 3
—	BUNDLE 4	Bundling Headquarter	Dept 4

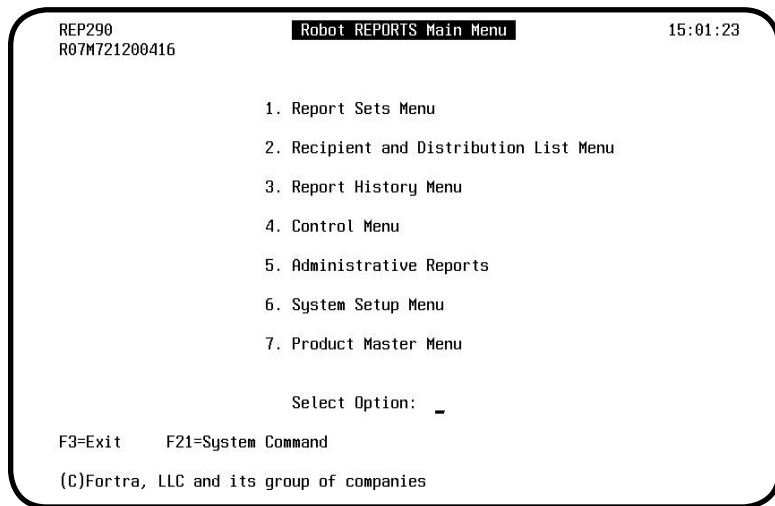
F3=Exit F4=Prompt F6=Add Record F9=Select Search
 F12=Previous F21=System Command F22=Preceding Opt F23=Prev Options

- Edit the recipient profile for any employee whose information you want to modify. All the address information you define will appear on the Maintain Recipients panel. You can use this panel to change recipient information in the future or delete a recipient from the list.
- Press **F3** to return to the Recipient and Distribution List Menu.

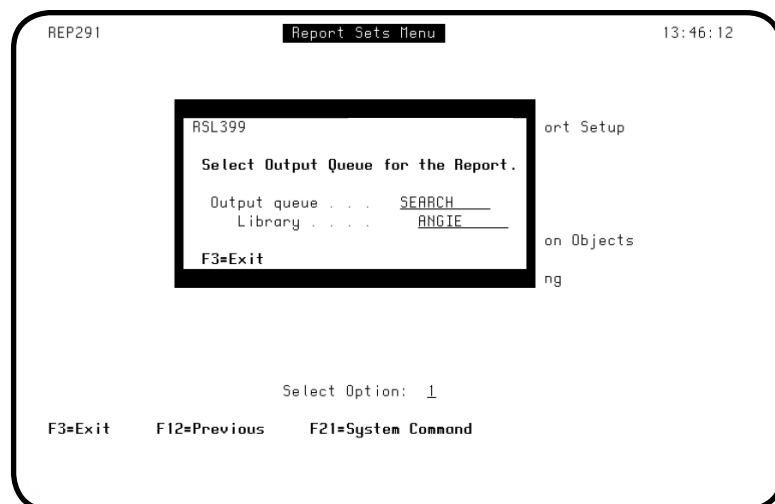
Automated Setup of Report Sets

The Robot GUIDE for Automated Report Setup option sets up a report set with a minimum number of steps so you can process and view your reports quickly. Automated setup creates a report set that uses the SEARCH method. The SEARCH method empowers Robot Reports to search the selected output queue for spooled files that have been generated by your report programs and to process them immediately.

Robot GUIDE uses defaults shipped with Robot Reports. You can change these defaults while you create the report set. Or, after you have set up your report set, you can modify or maintain it using the options on the Report Sets Menu. See the *Robot Reports Administrator Guide* for a complete discussion.

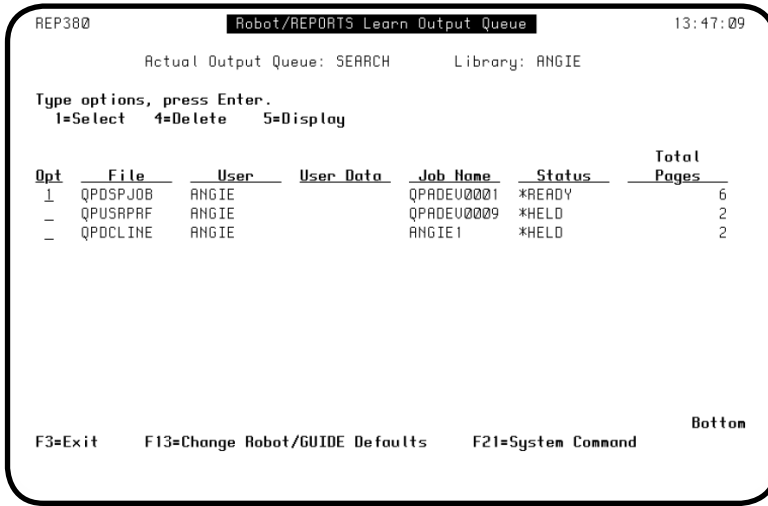


1. On the Robot Reports Main Menu, select **option 1** to display the Report Sets Menu.



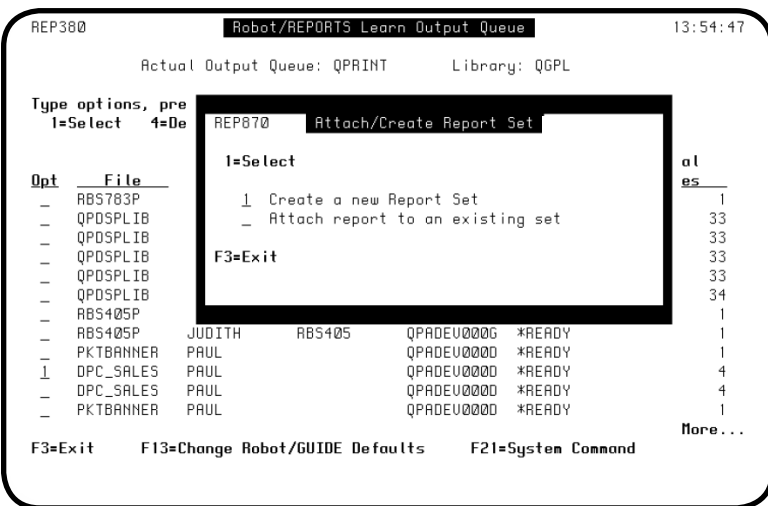
2. Select **option 1** on the Report Sets Menu to begin the Automated Setup process. A window displays so you can enter the name of the output queue and library where the spooled files you will be processing currently are found. Press Enter to display the Robot Reports Learn Output Queue panel.

Automated Setup of Report Sets



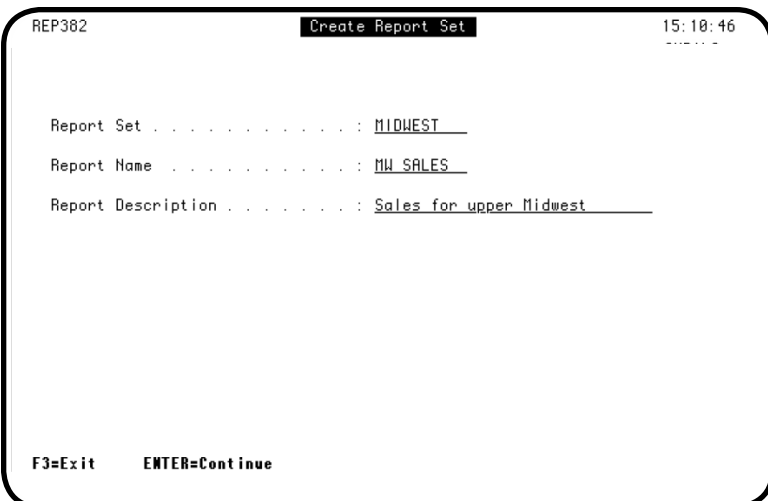
- The Robot Reports Learn Output Queue panel shows all the spooled files on the selected output queue. Enter a **1** next to the file for which you want to create a report set. You can display or delete the spooled files in the list.

You also can press **F13** to change defaults for the report set, such as output and archive options. See Changing Robot GUIDE Defaults in the *Robot Reports Administrator's Guide* for more information.



- The Attach/Create Report Set window displays with Create a new Report Set already selected. Just press Enter to display the Create Report Set panel to define the new report.

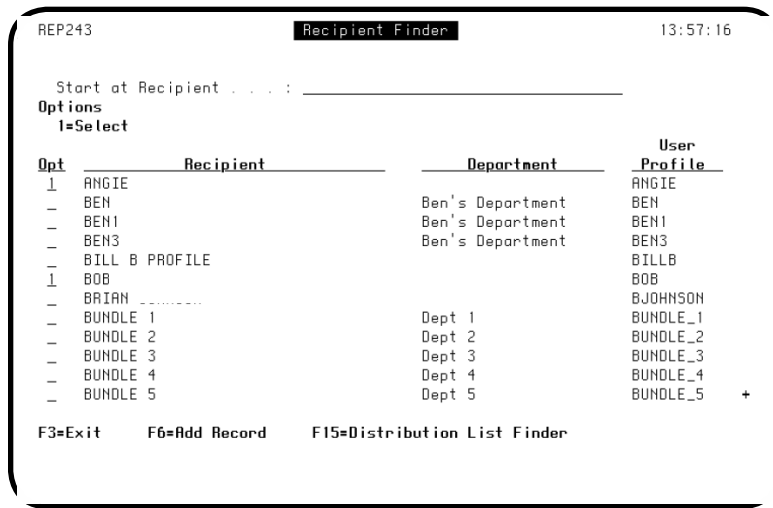
Note: If you have an existing report set to which you want to attach the new report, enter a **1** next to Attach the report to an existing set. A list of other report sets currently defined to Robot Reports displays. Select the report set to which you want to attach the new report.



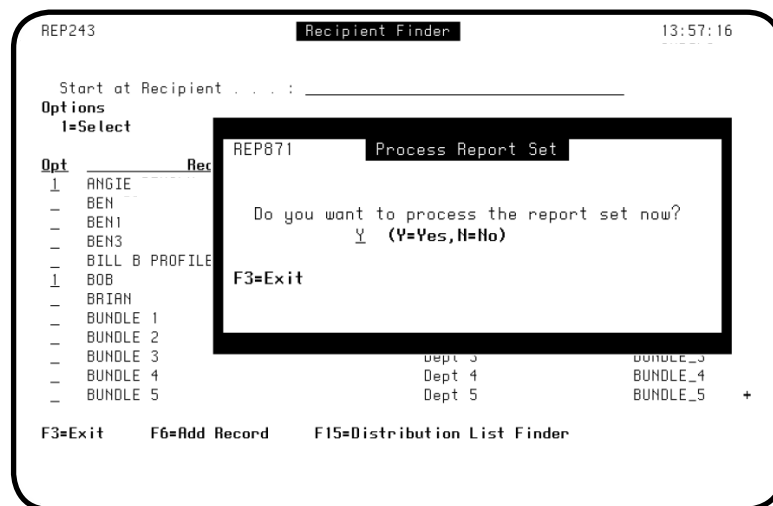
- On the Create Report Set panel, enter a name for the report set, the report name, and a brief description of the report. Press Enter to display the Recipient Finder.

Note: If you selected Attach report to an existing set in the previous step, the Create Report Set panel does not display.

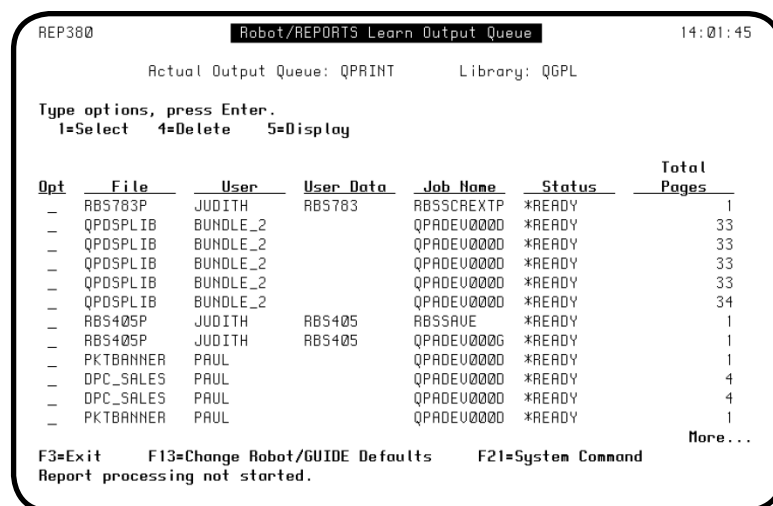
Automated Setup of Report Sets



- On the Recipient Finder panel, enter a **1** next to the names of all the recipients who should receive the report. You must select at least one recipient.



- When you have selected your recipients, press Enter to display the Process Report Set window. Enter a **Y** if you want to process the report set immediately. Enter an **N** if you do not want to process the report set now.
- Press Enter to return to the Robot Reports Learn Output Queue panel. If you selected to process the report set, the name of the spooled file appears highlighted.



- From the Robot Reports Learn Output Queue panel, you can choose to define another report set from the same output queue. Or, press **F3** to return to the Report Sets Menu.

Automated Setup of Report Sets

```

REP291          Report Sets Menu          15:14:52

Maintain Report Set Objects
  1. Robot GUIDE for Automated Report Setup
  2. Maintain Report Sets
  3. Copy Report Set

Maintain Other Report Objects
  4. Maintain Laser Command Names
  5. Maintain Exception Distribution Objects
  6. Maintain OPAL Tables
  7. Report Programs Changed Listing

Select Option:  _

F3=Exit  F12=Previous  F21=System Command
    
```

10. You have now finished creating a report set. You can select **option 1** again to create another report set using automated setup from a different output queue. Or, select an option from the Reports Sets panel to modify the new report set you just created.

```

REP201          Maintain Report Sets      15:13:09

Start at Report Set . . . : _____
Search Description for . . : _____
Options
  A=Add/Copy/Delete  I=Select  ?=More Options

Opt  Report Set  Description  Application
--  -
  --  DAVEJ      Dave J's test
  --  DKJ        Dave J's test
  --  DLTABLE    table test          AUTO
  --  DP         REPORTS
  --  DY
  --  DY
  --  FI         report
  --  JUNE13     For PDF report testing  AUTO
  --  KELLYLINK kelly link
  --  KE
  --  KL         AUTO
  --  MIDSALES   Midwest Sales Report  AUTO
  --
F3=Exit  F4=Prompt  F6=Add Record  F9=Select Search
F12=Previous  F21=System Command  F22=Preceding Opt  F23=Prev Options
    
```

11. To modify the report set, select **option 2** from the Report Sets panel. The report set you just created appears on the Maintain Report Sets panel. The Application column defaults to AUTO for report sets created through automated setup.

From this panel, you can press **F4** in the Opt column to select from a list of options for the report set.

Monitoring an Output Queue

Use the command **REPOUTQMON** to set up output queues to be monitored for spooled file entries. This command can be prompted to start or stop the monitoring of any output queue you select. The output queues that Robot Reports monitors must not be associated with a printer.

```

Change Monitoring Status (REPOUTQMON)

Type choices, press Enter.

Output Queue . . . . . QPRINT      Name
Output Queue Library . . . . . QGPL      Name, *LIBL
Monitoring Status . . . . . *START     *START, *STOP

Bottom
F3=Exit  F4=Prompt  F5=Refresh  F12=Cancel  F13=How to use this display
F24=More Keys
  
```

```

REP290      Robot REPORTS Main Menu      15:01:23
R07M721200416

1. Report Sets Menu
2. Recipient and Distribution List Menu
3. Report History Menu
4. Control Menu
5. Administrative Reports
6. System Setup Menu
7. Product Master Menu

Select Option: _

F3=Exit  F21=System Command
(C)Fortra, LLC and its group of companies
  
```

```

REP296      Control Menu      15:19:46

Robot REPORTS is: ACTIVE

Output Queue Monitoring
1. Start Output Queue Monitoring
2. End Output Queue Monitoring
3. Display Robot REPORTS Subsystem
4. Work With Output Queue Status
Archiving
5. Move Reports to Next Archive Stage
Bundling Options
6. Bundle all Reports Processed
7. Bundle Reports Processed for a Recipient

Select Option: _

F3=Exit  F21=System Command
  
```

1. If you want Robot Reports to monitor an output queue, type the command **REPOUTQMON** and press **F4**. Enter the output queue name, the library, and whether you want to start or stop monitoring. If you want Robot Reports to monitor more than one output queue, use this command for each. The start or stop function can also be performed through the following screens within the Robot Reports product.
2. Display the Robot Reports Main Menu. Select **option 4** to display the Control Menu.
3. Select **option 1** on the Control Menu to start output queue monitoring. Robot Reports will monitor the output queues you selected with the command **REPOUTQMON**. When you run your report program as usual, it will create a spooled file and place it on a monitored queue. Robot Reports then compares its entry information with each report set's report name data. When a match is found, Robot Reports begins processing the spooled file automatically.
4. To add more output queues to monitor, you don't have to end and restart queue monitoring. Use the **REPOUTQMON** command or **option 4** on the Control Menu to add more output queues while output queue monitoring is running.

Advanced Report Setup

Quick Tour 1: Setting Up Reports Using the ROBOT Method

If you do not use automated setup to set up a report set that uses the SEARCH method, you can use the Robot Schedule method described in this quick tour. For this type of report set, a Robot Schedule job provides the spooled file to Robot Reports for processing.

```

REP290          Robot REPORTS Main Menu          15:01:23
R07M721200416

          1. Report Sets Menu
          2. Recipient and Distribution List Menu
          3. Report History Menu
          4. Control Menu
          5. Administrative Reports
          6. System Setup Menu
          7. Product Master Menu

          Select Option:  _

F3=Exit      F21=System Command

(C)Fortra, LLC and its group of companies
  
```

1. On the Robot Reports Main Menu, select **option 1** to display the Report Sets Menu.

```

REP291          Report Sets Menu                15:14:52

          Maintain Report Set Objects
          1. Robot GUIDE for Automated Report Setup
          2. Maintain Report Sets
          3. Copy Report Set

          Maintain Other Report Objects
          4. Maintain Laser Command Names
          5. Maintain Exception Distribution Objects
          6. Maintain OPAL Tables
          7. Report Programs Changed Listing

          Select Option:  _

F3=Exit      F12=Previous      F21=System Command
  
```

2. Select **option 2** on the Report Sets Menu. This displays the Maintain Report Sets panel so you can define a report set.

```

REP201          Maintain Report Sets           14:03:14

Start at Report Set . . . : _____
Search Description for . . : _____
Options
A=Add/Copy/Delete      I=Select      ?=More Options

Opt  Report Set  Description  Application
--  -
--  ACCOUNTING  Month end accounting reports  AUTO
--  ADMINRPTS   SETUP REPORTS                 AUTO
--  ANGLE       RTS                           AUTO
--  CAR006      Daily Credit Hold             AUTO
--  CONSOLE_01  first selected                 AUTO
--  CONSOLE_02  Second selected               AUTO
--  CONSOLE_03  Third selected                 AUTO
--  CP         Current Monthly Eligibility
--  DAVEJ      DaveJ's test
--  DP        SALES AND                 AUTO
--  G1       joblogs                   AUTO
--  G1       cpa report                 AUTO      +

F3=Exit      F4=Prompt      F6=Add Record      F9=Select Search
F12=Previous  F21=System Command  F22=Preceding Opt  F23=Prev Options
  
```

3. To begin defining report sets to Robot Reports, press **F6**. This displays the Report Set panel, on which you define your report set.

Setting Up Reports

Quick Tour 1: Setting Up Reports Using the ROBOT Method

REP210 Report Set 15:39:57

Report Set Information:
 Report Set : MIDSALLES
 Description : Northern Midwest Sales
 Application : SALES
 Report Program Name : _____ Library : _____
 Print Schedule : _____ (memo only)
 Accounting Code : _____ (F4 = Prompt)
 Hold Set from Processing : N
Report Processing Code (1 = Select)
 _ EXECUTE 1 ROBOT _ SEARCH
 Do you want to submit report to distribution: N (Y=Yes,N=No)
 Job Queue for Distribution: _____ Library: _____

Days Report Remains in Archive
 Online : 5
 Short Term Storage : 20 Long Term Storage: 30
 Report Command : _____

(F4 = Prompt Command)

F3=Exit F4=Prompt F6=Add/Copy/Delete F10=Start Navigator
 F12=Previous F21=System Command F22=Preceding Opt F23=Prev Options

- Use the Report Set panel to enter information for the report set you are defining. At the top of the panel, enter the name and a description of the report set. In this example, a Robot Schedule job provides the spooled file to Robot Reports for processing, so enter a 1 next to ROBOT. You can accept the default values for the other fields on the panel. Press **F10** to start the Navigator and proceed to the next panel. After you start the Navigator, you can press **F3** at any time to return to the preceding panel.

REP207 Maintain Report Names 14:32:49

Report Set : MIDSALLES2 Northern Midwest Sales
 Start at Report Name : _____
 Search Description for : _____

Options
 A=Add/Copy/Delete 1=Select ?=More Options

Opt	Report Name	Description
No records exist to display.		

F3=Exit F4=Prompt F6=Add Record
 F12=Previous F21=System Command F22=Preceding Opt F23=Prev Options

- The Maintain Report Names panel lists all the report names that are defined for a report set. To define a report name for the report set, press **F6** to display the Report Name panel.

REP223 Report Name 15:44:16

Report Set : MIDSALLES2 Northern Midwest Sales

Report Name Information:
 Report Name : MIDSALLES
 Description : Northern Midwest Sales
 Remove Spool File After Running Report : N (Y=Yes,N=No)
 Limited Functions (Print/Archive) : N (Y=Yes,N=No)
 OPRL Processing Type : 2 (F4=Prompt)

Comparison Information: (leave blank to default)
Spool File Attributes:
 Spool Name : MIDSALLES User Data : _____
 Job Name : _____ Output Queue : _____
 User : _____ Form type : _____

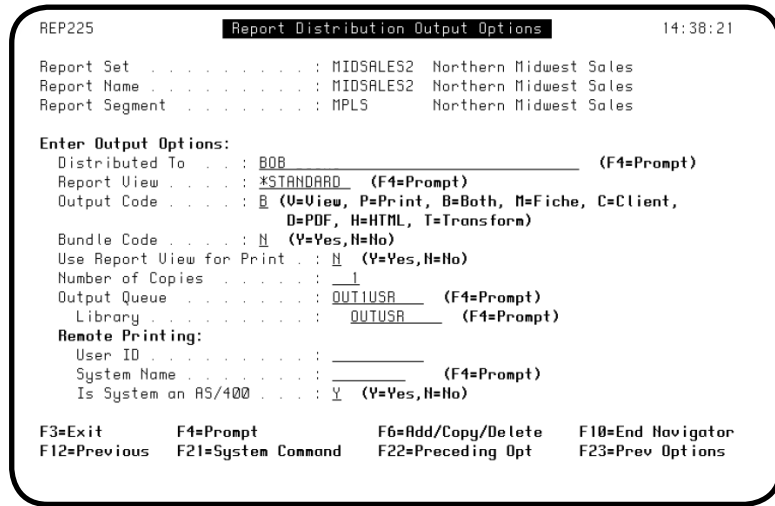
F3=Exit F4=Prompt F6=Add/Copy/Delete F10=Next
 F12=Previous F14=Check Input F21=System Command F24=More Keys

- On the Report Name panel, enter a name for the report, and a brief description. Enter the file name of the spooled file as it appears on the output queue in the Spool File Comparison Information section. Robot Reports uses this name to locate the file for processing.

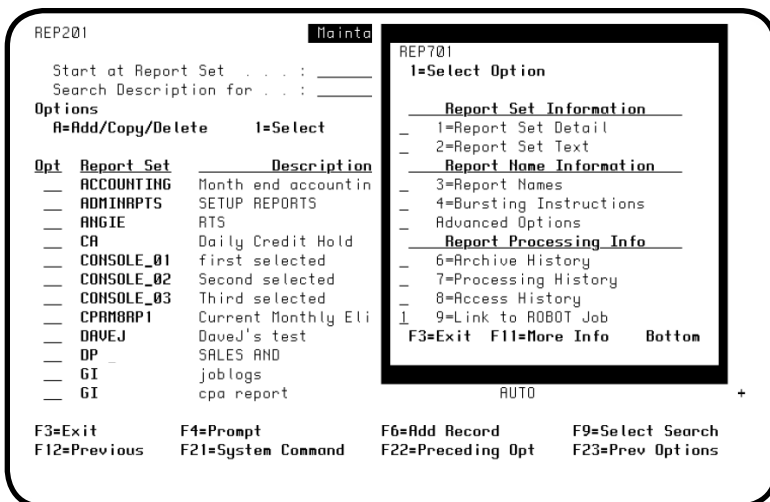
Press **F10** to proceed to the next panel.

Setting Up Reports

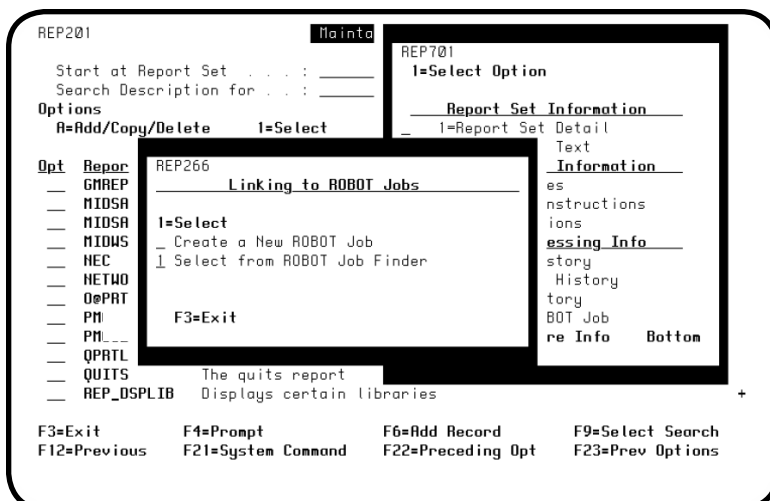
Quick Tour 1: Setting Up Reports Using the ROBOT Method



10. Use the Report Distribution Output Options panel to define who will receive the segment. A recipient can be either an individual or a distribution list. The report view defaults to *STANDARD, which is the original report layout. You can change this if you have other report views defined. Enter a **B** to allow the recipients to view and print the report (see the *Robot Reports Administrator Guide* for additional security options). Press **F10** to end the navigator and go to the Maintain Report Sets panel.



11. Now you need to link the Robot Reports set to the Robot Schedule job that has been processing the report. To display the options window, press **F4** in the Opt field next to the report set. Select **option 9**, Link Set to Robot Schedule Job.



12. When you link to a Robot Schedule job, you have the option of creating a new Robot Schedule job, or selecting an existing Robot Schedule job from the Robot Schedule Job Finder. Enter a **1** next to Select from Robot Schedule Job Finder, since the report Robot Reports will process is created by an existing Robot Schedule job.

Quick Tour 1: Setting Up Reports Using the ROBOT Method

```

RBT279          ROBOT Job Finder          14:42:18

Start job list at: Job _____
Options
1>Select
Sched. Job      Job to be run
OPT Code Type Name Description Time M T W TH F S SH
- HOLD C AGEOUTQ Age Outq Qprint Y Y Y Y Y
- REACT C AK      Replay Object AK... 13:42
- HOLD C DLTHSTLOG Delete History Y Y Y Y Y Y Y
- C D50S85 REPORTS 7 TESTING 00:00
- C DSPLIB 00:00
- HOLD C PRDTSKSPC Print Disk Space Y Y Y Y Y
- HOLD C RBN _ _ _ Poll systems in netw Y Y Y Y Y
1 C RBTBLDFCT Forecast build 16:05 Y
- HOLD C RBT655 Purge Robot History Y
- C REP28906 Report Set Informati 00:00
- C U 00:00 C

Botton

F3=Exit F9=Job search criteria
    
```

13. When you press Enter, the Robot Schedule Job Finder panel displays. Select the job to which you want to link by entering a 1 next to the job name.

```

RBT201          Initial Job Setup for Job Number 00000000002 14:43:00

DESCRIBE YOUR JOB
(F4=Prompt)
Job Type: C Command
Job Name: RBTBLDFCT Desc: Forecast build Application: _____
Notes: Linked to Midwest Sales Results

RUN INFORMATION

Run Times: 16:05 _____

Run Days: Y=Every week, WK=Week number, L=Last week of the month
Y/WK/L Day Started Ended Run Time Status Last day completed 3/05/03
Y Monday Last start time 16:05
Y Tuesday Last end time 16:05
Y Wednesday Last run time
Y Thursday Last job status C
Y Friday
- Saturday
- Sunday
Schedule Override Code: _ (F4=Prompt)

F3=Exit F4=Prompt F10=Next Option
F12=Previous F21=Command Line F23=More Options
    
```

14. The Robot Schedule Initial Job Setup panel will display with the scheduling information for the job. You can change this schedule if you prefer. The next time the job processes on Robot Schedule, the report it creates will be diverted to Robot Reports for processing as specified by the report set you defined.

Setting Up Reports

Quick Tour 2: Changing Distributions for a Report

1. On the Robot Reports Main Menu, select **option 1**, to display the Report Sets Menu.

```

REP290          Robot REPORTS Main Menu          15:01:23
R07M721200416

1. Report Sets Menu
2. Recipient and Distribution List Menu
3. Report History Menu
4. Control Menu
5. Administrative Reports
6. System Setup Menu
7. Product Master Menu

Select Option:  _

F3=Exit      F21=System Command

(C)Fortra, LLC and its group of companies
    
```

2. On the Report Sets Menu, select **option 2**, Maintain Report Sets.

```

REP291          Report Sets Menu                15:14:52

Maintain Report Set Objects
1. Robot GUIDE for Automated Report Setup
2. Maintain Report Sets
3. Copy Report Set

Maintain Other Report Objects
4. Maintain Laser Command Names
5. Maintain Exception Distribution Objects
6. Maintain OPAL Tables
7. Report Programs Changed Listing

Select Option:  _

F3=Exit      F12=Previous      F21=System Command
    
```

3. On the Maintain Report Sets panel, press **F4** in the Opt field next to the Report Set for which you want to change distribution. From the options menu, select **option 4**, Bursting Instructions.

```

REP201          Mainta                          REP701
Start at Report Set . . . . :
Search Description for . . . :

Options
A=Add/Copy/Delete      I=Select

Opt  Report Set  Description
--  -
GNREPORTS      Good Morning
MIDSALES       Midwest Sales Repor
MIDSALES2      Northern Midwest Sa
MIDSALES       Midwest Sales Repor
N
NETWORK        Product Events
O
PNCEXECUTE     EXECUTE
PNCSEARCH      paul search
QPRTL IBL      test
QUITS          The quits report
REP_DSPLIB     Displays certain libraries

F3=Exit      F4=Prompt      F6=Add Record      F9=Select Search
F12=Previous  F21=System Command  F22=Preceding Opt  F23=Prev Options
    
```


Setting Up Reports

Quick Tour 2: Changing Distributions for a Report

```

REP225          Report Distribution Output Options          14:51:19

Report Set      : MIDSALLES2 Northern Midwest Sales
Report Name    : MIDSALLES2 Northern Midwest Sales
Report Segment : MPLS      Northern Midwest Sales

Enter Output Options:
Distributed To  : BRIAN (F4=Prompt)
Report View    : *STANDARD (F4=Prompt)
Output Code    : B (U=View, P=Print, B=Both, N=Fiche, C=Client,
                  D=PDF, H=HTML, T=Transform)
Bundle Code    : N (Y=Yes, N=No)
Use Report View for Print : N (Y=Yes, N=No)
Number of Copies : 1
Output Queue   : USROUTO (F4=Prompt)
Library        : PAULUSR (F4=Prompt)

Remote Printing:
User ID        : (F4=Prompt)
System Name    : (F4=Prompt)
Is System an AS/400 : Y (Y=Yes, N=No)

F3=Exit      F4=Prompt      F6=Add/Copy/Delete      F10=End Navigator
F12=Previous F21=System Command F22=Preceding Opt      F23=Prev Options
    
```

7. Enter the name of the recipient, the report view, and the output code. The remaining information on the panel is determined by the output code.

If you enter an output code of **B** (Both), the recipients automatically receive a printed copy of the report and can view the report online. The bundle code of **Y** specifies that the report should be bundled into a packet, to be delivered to the recipient. Specify if the report view format should be used for printing and the number of copies to be printed for each recipient.

```

REP225          Report Distribution Output Options          14:52:16

Report Set      : MIDSALLES2 Northern Midwest Sales
Report Name    : MIDSALLES2 Northern Midwest Sales
Report Segment : MPLS      Northern Midwest Sales

Enter Output Options:
Distributed To  : PAT (F4=Prompt)
Report View    : *STANDARD (F4=Prompt)
Output Code    : P (U=View, P=Print, B=Both, N=Fiche, C=Client,
                  D=PDF, H=HTML, T=Transform)
Bundle Code    : N (Y=Yes, N=No)
Use Report View for Print : N (Y=Yes, N=No)
Number of Copies : 1

F3=Exit      F4=Prompt      F6=Add/Copy/Delete      F10=End Navigator
F12=Previous F21=System Command F22=Preceding Opt      F23=Prev Options
    
```

8. Press **F6** to add distribution information for the next recipient.

To restrict this recipient to receiving a printed report, enter an output code of **P** (Print). By entering a bundle code of **N**, the report will be printed immediately.

```

REP225          Report Distribution Output Options          13:14:16

Report Set      : MIDSALLES2 Northern Midwest Sales
Report Name    : MIDSALLES2 Northern Midwest Sales
Report Segment : MPLS      Northern Midwest Sales

Enter Output Options:
Distributed To  : CHRIS (F4=Prompt)
Report View    : *STANDARD (F4=Prompt)
Output Code    : M (U=View, P=Print, B=Both, N=Fiche, C=Client,
                  D=PDF, H=HTML, T=Transform)
Bundle Code    : N (Y=Yes, N=No)

Microfiche Options:
File           : REP07 (F4=Prompt)
Library        : ANGIE (F4=Prompt)
File Updates   : A (A=Add Records, R=Replace Records)
Control Character : 1 (1=*PRCTCL, 2=*FCFC)

F3=Exit      F4=Prompt      F6=Add/Copy/Delete      F10=End Navigator
F12=Previous F21=System Command F22=Preceding Opt      F23=Prev Options
    
```

9. Press **F6** to add the next recipient. Another distribution option allows you to specify that a report be placed into a microfiche-formatted file for processing into microfiche output.

Enter an **M** in the Output Code field and press Enter. The Microfiche Options fields then display on the panel. Enter the names of the microfiche file and library. Specify whether you want to overwrite existing records (**R**) or append new records to the current file (**A**).

Quick Tour 2: Changing Distributions for a Report

```

REP225          Report Distribution Output Options          13:16:59
Report Set      : MIDSales2 Northern Midwest Sales
Report Name     : MIDSales2 Northern Midwest Sales
Report Segment  : MPLS Northern Midwest Sales

Enter Output Options:
Distributed To  : PAUL (F4=Prompt)
Report View    : *STANDARD (F4=Prompt)
Output Code    : C (U=View, P=Print, B=Both, H=Fiche, C=Client,
                  D=PDF, H=HTML, T=Transform)
Bundle Code    : N (Y=Yes, N=No)
Client Target:
Directory     : *RECIPIENT
File Name     : MIDSales.TXT
E-Mail Upon Completion: Y (Y=Yes, N=No)

File          :
Library       :

F3=Exit      F4=Prompt      F6=Add/Copy/Delete  F10=End Navigator
F12=Previous F21=System Command F22=Preceding Opt  F23=Prev Options
    
```

10. Press **F6** to add the next recipient. The Client distribution option (C) puts the report in column-delimited format so you can download it into a PC spreadsheet.

Enter a **C** in the Output Code field and press Enter. Enter the directory/file name or file/library where you want the file stored. (If you want to email the report, use the Directory/File Name fields.) Enter **Y** if you want to email the report to the recipient's PC mailbox.

```

REP225          Report Distribution Output Options          15:22:39
Report Set      : MIDSales2 Northern Midwest Sales
Report Name     : MIDSales2 Northern Midwest Sales
Report Segment  : MPLS Northern Midwest Sales

Enter Output Options:
Distributed To  : ANGIE (F4=Prompt)
Report View    : *STANDARD (F4=Prompt)
Output Code    : D (U=View, P=Print, B=Both, H=Fiche, C=Client,
                  D=PDF, H=HTML, T=Transform)
Bundle Code    : N (Y=Yes, N=No)
PDF Target:
Directory     : QDLS/REPORTS
File Name     : MIDSales.PDF
E-Mail Upon Completion: N (Y=Yes, N=No)

Auto-Increment PDF Name . . . : N

F3=Exit      F4=Prompt      F6=Add/Copy/Delete  F10=End Navigator
F12=Previous F21=System Command F22=Preceding Opt  F23=Prev Options
    
```

11. Press **F6** to add the next recipient. The PDF distribution option converts the report to Portable Document Format, which can be viewed and printed by any computer that has Adobe Acrobat Reader installed.

Enter a **D** in the Output Code field and press Enter. Enter the name of the file and the directory where you want it stored. Enter **Y** if you want to email the report to the recipient's PC mailbox. In the Auto-Increment field, enter **Y** if you do not want to overwrite previous versions of the report.

Note: You can use CC Address only if you are using Robot Client to email; Robot Alert does not support it.

Setting Up Reports

Quick Tour 2: Changing Distributions for a Report

```

REP225      Report Distribution Output Options      14:51:52
Report Set   : MIDSales2 Northern Midwest Sales
Report Name  : MIDSales2 Northern Midwest Sales
Report Segment : MPLS Northern Midwest Sales

Enter Output Options:
Distributed To : DAUE (F4=Prompt)
Report View   : *STANDARD (F4=Prompt)
Output Code   : H (U=View, P=Print, B=Both, H=Fiche, C=Client,
                D=PDF, H=HTML, T=Transform)
Bundle Code   : N (Y=Yes, N=No)
HTML Target:
Directory    : //ODLS/REPORTS
File Name    : MIDSales.HTM
E-Mail Upon Completion: N (Y=Yes, N=No)

Auto-Increment HTML Name : N

F3=Exit      F4=Prompt      F6=Add/Copy/Delete  F10=End Navigator
F12=Previous F21=System Command F22=Preceding Opt  F23=Prev Options
    
```

12. Press **F6** to add the next recipient. The HTML distribution option converts the report to HyperText Markup Language, which can be uploaded to the Internet or e-mailed to users. Enter an **H** in the Output Code field and press Enter. Enter the name of the file and the directory where you want it stored. Enter **Y** if you want to email the report to the recipient's PC mailbox.

```

REP225      Report Distribution Output Options      14:42:16
Report Set   : MIDSales2 Northern Midwest Sales
Report Name  : MPLS Northern Midwest Sales
Report Segment : *REPORT Northern Midwest Sales

Enter Output Options:
Distributed To : MONICA (F4=Prompt)
Report View   : *STANDARD (F4=Prompt)
Output Code   : I (U=View, P=Print, B=Both, H=Fiche, C=Client,
                D=PDF, H=HTML, T=Transform)
Bundle Code   : N (Y=Yes, N=No)
Transform File Set : SALESRPTS (F4=Prompt)

F3=Exit      F4=Prompt      F6=Add/Copy/Delete  F10=End Navigator
F12=Previous F21=System Command F22=Preceding Opt  F23=Prev Options
    
```

13. Press **F6** to add the next recipient. The Transform distribution option converts the report set and options that you specified using Robot Transform (Robot Transform must be installed on the system to use this option). Enter a **T** in the Output Code field and press Enter. Enter the name of the Robot Transform file set that you created using Robot Transform.

```

REP241      Maintain Report Distributions          15:28:53
Report Set   : MIDSales2 Northern Midwest Sales
Report Name  : MIDSales2 Northern Midwest Sales
Report Segment : MPLS Northern Midwest Sales
Start at Distributed To : _____

Options
A=Add/Copy/Delete  I=Select  ?=More Options

  Opt  Distributed To      Output Code  Bundle Code  Nbr of Copies  Report View
  ---  -
  ___ ANGIE                PDF         N             1             *STANDARD
  ___ BOB BU              VIEW        N             1             *STANDARD
  ___ BRIAN               BOTH        N             1             *STANDARD
  ___ CHRIS               FICHE      N             1             *STANDARD
  ___ DAUE                HTML       N             1             *STANDARD
  ___ PAT I               PRINT      N             1             *STANDARD
  ___ PAUL                CLIENT     N             1             *STANDARD
  ___ MONICA              TRN        N             1             *STANDARD

F3=Exit      F4=Prompt      F6=Add Record      F9=Select Search
F12=Previous F21=System Command F22=Preceding Opt  F23=Prev Options
    
```

14. When you return to the Maintain Report Distributions panel, all the recipients you defined are listed, along with the distribution options you specified.

Quick Tour 3: Viewing a Report

```

RSL201          Robot Automated Operations Solution          15:40:07

 1. Robot Schedule          16. Robot UPS
 2. Robot Alert            17. Ezview
 3. Robot Autotune         18. Robot LPAR
 4. Robot Client           19. Robot Transform
 5. Robot Console          20. Robot Schedule for SAP
 6. Robot Corral           21. Robot Browser Interface
 7. Robot CPA              22. Robot Schedule for EnterpriseOne
 8. Robot Monitor          23. Robot Security
 9. Robot Network          24. Robot Schedule Enterprise
10. Robot Network Node     25. Robot HA
11. Robot Replay           26. Performance Navigator
12. Robot Reports
13. Robot Save
14. Robot Space

.....
                        Command
.....

====> REPDSP
: F4=Prompt  F9=Retrieve  F12=Cancel
:

```

1. Enter the command **REPDSP** to display a list of the report sets to which you are authorized.

Note: The RBTREPLIB library must be in your library list to use the REPDSP command.

```

REP211          Recipient Reports                          15:07:09

Recipient . . . . . : BOB
Start at Report Set . . . :
Search Descriptions for . . :
Options:  I=View Report  ?=More Options

Opt  Segment Description  Set Description  Output  Last Run
---  -
Midwest Sales             All Reports     BOTH    5/29/03 10:08
Sports                    All Reports     BOTH    5/29/03 10:08
Sports                    All Reports     BOTH    5/29/03 10:08
Midwest Sales Report      Midwest Sales Report BOTH    7/09/03 13:12
Midwest Sales Report      Midwest Sales Report BOTH    7/09/03 13:12

F3=Exit      F4=Prompt      F9=Select Search
F11=More Info F12=Previous  F15=My Info

```

2. The Recipient Reports panel lists the report sets that you are authorized to see. Press **F9** to change the sort order of the panel. You can sort by bundle or report set order.

To display more information for the report set, press **F11**. Pressing **F15** displays the My Information panel, where you can update personal information for your reports (name, title, address, and how you want your report packet printed.)

```

REP211          Recipient Reports                          15:07:09

Recipient . . . . . : BOB
Start at Report Set . . . :
Search Descriptions for . . :
Options:  I=View Report  ?=More Options

Opt  Segment Description  Set Description  Output  Last Run
---  -
Midwest Sales             All Reports     BOTH    5/29/03 10:08
Sports                    All Reports     BOTH    5/29/03 10:08
Sports                    All Reports     BOTH    5/29/03 10:08
Midwest Sales Report      Midwest Sales Report BOTH    7/09/03 13:12
Midwest Sales Report      Midwest Sales Report BOTH    7/09/03 13:12

F3=Exit      F4=Prompt      F9=Select Search
F11=More Info F12=Previous  F15=My Info

```

```

REP701          SYBIL3
I=Select Option

Report Viewing Options
1 1=View Last Report Version Run
 2=Archived Report Versions
Other Report Options
3=Report Indexes
4=Print Last Report Version
5=Change Report Access Info
6=Display Access History
F3=Exit F11=More Info Bottom

```

3. To display the options for a report, press **F4** next to the name of the report set. Through the options window, you can view a report, work with archived reports and report indexes, print a report, change report access information, and display report access history.

To view an archived report, enter **1** in the Opt column for Archived Report Versions.

Viewing a Report

Quick Tour 3: Viewing a Report

REP226 Recipient Archived Reports 15:11:14

Recipient : BOB
 Report Set : MIDSALES Midwest Sales Report
 Report Name : MIDWEST Midwest Sales Report
 Report Segment : APPAREL Midwest Sales Report
 Report View : *STANDARD *STANDARD
 Output Code : BOTH Number Versions to Show: 999
 Print Schedule :
 Start at Splf Create Date . . . : 8/00/00

Options: I=Display Report ?=More Options

Opt	Splf Create Date	Time	Status	Change Date	Time	Nbr of Lines	Nbr of Pages
1	7/09/03	13:12	RESTORED	8/04/03	15:54	66	1
—	5/29/03	10:08	SHORTTERM	7/29/03	9:51	132	2
—	5/29/03	10:08	SHORTTERM	7/29/03	9:51	132	2
—	5/16/03	13:54	SHORTTERM	7/29/03	9:51	66	1
—	5/16/03	13:35	RESTORED	7/03/03	16:33	132	2
—	5/16/03	13:35	SHORTTERM	7/03/03	16:33	132	2

F3=Exit F4=Prompt F12=Previous
 F21=System Command F22=Preceding Opt F23=Prev Options

4. The Recipient Archived Reports panel lists all the available versions of the selected report. It also tells you the archive status of each report. To select a report, enter a **1** next to the version you want to see. If the report is in online archive, it will be loaded immediately. If it is in short- or long-term archive, you must restore it before viewing it.

REP250 MIDWEST SALES 12:00:45
 Relative Page _____ Line _____ Column _____ View: *STANDARD
 Options: ?=More Options

4/03/03 3:01:18 2002 SALES REPORT APPAREL HLP0013 Page

PRODUCT INFORMATION	QUANTITY ORDERED	QUANTITY SOLD	QUANTITY REMAINING	1ST QUARTER SALES	2ND QUARTER SALES	3RD QUARTER SALES	4TH QUARTER SALES	% CH
HAT, RED LOGO	53	19	0,053	20	16	7	6	
HAT, BLUE NO LOGO	118	4	114	0	150	2	1	
HAT, WHITE TRIM	21,298	11,458	9,848	1,842	1016	756	45	3
TOP, REG/WHITE/BLUE	7,381	294	7,177	50	104	35	15	1
TOP, WHITE	61,961	58,458	15,117	4,269	1,456	14,125	9,152	1
TOP, BLUE	45,581	42,687	2,894	2,782	4,258	2,569	4,254	1
TOP, RED	656,113	115,452	749,661	1,245	6,369	21,373	7,147	+

F3=Exit F4=Prompt F5=Refresh F7=Scan Window F8=Scan Again F9=Actual Page F12=Previous
 F14=Services F19=Left F20=Right

5. The report is loaded in the format specified by your default view.

To scan for a value in the report, press **F7**. **F9** lets you choose between using relative or actual page numbers. Actual page numbers are the page number of the report. Relative page numbers are the page numbers in your segment of the report.

REP250 MIDWEST SALES 12:00:45
 Relative Page _____ Line _____ Column _____ View: *STANDARD
 Options: ?=More Options

4/03/03 3:01:18 2002 SALES REPORT APPAREL HLP0013 Page

PRODUCT INFORMATION	QUANTITY ORDERED	QUANTITY SOLD	QUANTITY REMAINING	1ST QUARTER SALES	2ND QUARTER SALES	3RD QUARTER SALES	4TH QUARTER SALES	% CH
HAT, RED LOGO	53	19	0,053	20	16	7	6	
HAT, BLUE NO LOGO	118	4	114	0	150	2	1	
HAT, WHITE TRIM	21,298	11,458	9,848	1,842	1016	756	45	3
TOP, REG/WHITE/BLUE	7,381	294	7,177	50	104	35	15	1
TOP, WHITE	61,961	58,458	15,117	4,269	1,456	14,125	9,152	1
TOP, BLUE	45,581	42,687	2,894	2,782	4,258	2,569	4,254	1
TOP, RED	656,113	115,452	749,661	1,245	6,369	21,373	7,147	+

REP245
 Is>Select
 Report View Service Options
 - Select a different Report View
 - Change CPAL Report View HILITE
 - Create Client Files
 - Create PDF Files
 - Work with Report Notes
 - Print Report
 - Create HTML Files
 F3=Exit

F3=Exit F4=Prompt F5=Refresh F7=Scan Window F8=Scan Again F9=Actual Page F12=Previous
 F14=Services F19=Left F20=Right

6. To work with the report view, press **F14** to display the Services options. From here, you can select a different view, highlight lines, create client and PDF files, work with notes for the report, and print the report.

Quick Tour 3: Viewing a Report

REP250 MIDWEST SALES
Relative Page 1 Line 1 Column 1 View: *STANDARD
Options: ?More Options

4/03/03 3:01:18
2002 SALES REPORT
APPAREL

PRODUCT INFORMATION QUANTITY ORDERED QUANTITY SOLD QUANTITY REMAINING 1ST

HAT, RED LOGO	53	49	0,853	
HAT, BLUE NO LOGO	118	4	114	
HAT, WHITE TRIM	21,298	11,450	9,848	
TOP, RED/WHITE/BLUE	7,381	204	7,177	
TOP, WHITE	61,961	50,450	15,117	
TOP, BLUE	45,501	42,607	2,894	12,782
TOP, RED	856,113	115,452	740,661	1,245
				4,258
				2,569
				21,573
				7,147

REP701
Select Option
Line Option Codes
W=Work with the line
F=Freeze the line
T=Make this line a Title
X=Exclude Line
C=Client OPAL
N=Work with Notes for a Line
Worksheet Options
Reset Modified Columns
Remove Frozen Columns
Remove Frozen Lines and Titles
F3=Exit F11=More Info Bottom

F3=Exit F4=Prompt F5=Refresh F7=Scan Window F8=Scan Again F9=Actual Page F12=Previous
F14=Services F19=Left F20=Right

- To work with a line in the report, position your cursor in the Opt column for the line and press **F4**. An options window displays. Enter 1 to select the option you want. You can freeze lines, make them titles, exclude them, work with notes, and mark columns for downloading to a client. To go back to the original format, you can use the worksheet options.

REP250 MIDWEST SALES
Relative Page 1 Line 1 Column 1 View: *STANDARD
Options: ?More Options

4/03/03 3:01:10
2002 SALES REPORT
APPAREL

1 2 3 4 5 6 7 8 9 10

HAT, BLUE NO LOGO	118	4	114	0	150	2
HAT, WHITE TRIM	21,298	11,450	9,848	1,042	1015	759
TOP, RED/WHITE/BLUE	7,381	204	7,177	50	104	35
TOP, WHITE	61,961	50,450	15,117	14,269	1,456	14,125
TOP, BLUE	45,501	42,607	2,894	12,782	4,250	2,569
TOP, RED	856,113	115,452	740,661	1,245	6,369	21,573

F3=Exit F4=Prompt F5=Refresh F7=Scan Window F8=Scan Again F9=Actual Page F12=Previous
F14=Services F19=Left F20=Right

- To work with the columns in the report, enter **W** (Work with line) in the opt column. A column ruler displays. Column operations include freeze (F), exclude (X), copy (C), and move (M). To freeze or exclude a column, enter **F** or **X** on the column ruler over each column you want. Press Enter.

REP250 MIDWEST SALES
Relative Page 1 Line 1 Column 1 View: *STANDARD
Options: ?More Options

4/03/03 3:01:18
2002 SALES REPORT
APPAREL

1 2 3 4 5 6 7 8 9 10

HAT, BLUE NO LOGO	118	4	114	0	150	2
HAT, WHITE TRIM	21,298	11,450	9,848	1,042	1015	759
TOP, RED/WHITE/BLUE	7,381	204	7,177	50	104	35
TOP, WHITE	61,961	50,450	15,117	14,269	1,456	14,125
TOP, BLUE	45,501	42,607	2,894	12,782	4,250	2,569
TOP, RED	856,113	115,452	740,661	1,245	6,369	21,573

F3=Exit F4=Prompt F5=Refresh F7=Scan Window F8=Scan Again F9=Actual Page
F14=Services F19=Left F20=Right

- To move or copy a column, enter **M** or **C** on the column ruler over the column you want. Enter **&** on the column ruler where you want the column to go. If that place is on a different window, press Enter. Press **F19** or **F20** to window to the place in the report. Enter **W** to display the column ruler, and enter the **&** where the column goes.

Quick Tour 4: Creating Multiple Bursting Instructions with Banner Pages

REP201 Mainta

Start at Report Set : _____
 Search Description for : _____

Options
 A=Add/Copy/Delete I=Select

Opt	Report Set	Description
—	GMREPORTS	Good Morning
—	MID	Midwest Sales Repor
—	MID	Northern Midwest Sa
—	MID	Midwest Sales Repor

REP701
I=Select Option

Report Set Information

— 1=Report Set Detail
 — 2=Report Set Text

Report Name Information

1 3=Report Names
 — 4=Bursting Instructions
 — Advanced Options

Report Processing Info

— 6=Archive History
 — 7=Processing History
 — 8=Access History
 — 9=Link to ROBOT Job

F3=Exit F11=More Info Bottom

F3=Exit F4=Prompt F6=Add Record F9=Select Search
 F12=Previous F21=System Command F22=Preceding Opt F23=Prev Options

1. This procedure explains how to set up multiple segments with banner pages using Bursting Instructions. When you have defined your report set, as described earlier in this Guide, press **F4** in the Opt field next to the report set to display the options window. Select **option 3**, Report Names.

REP207 Mainta

Report Set : MIDSAL
 Start at Report Name : _____
 Search Description for : _____

Options
 A=Add/Copy/Delete I=Select

Opt	Report Name	Description
—	MIDSALES2	Northern Midwest S

REP701
I=Select Option

Report Name Information

— 1=Report Name Detail
 1 2=Bursting Instructions
 — 3=Print Bursting Instructions
 — Advanced Options

F3=Exit F11=More Info Bottom

F3=Exit F4=Prompt F6=Add Record
 F12=Previous F21=System Command F22=Preceding Opt F23=Prev Options

2. The Maintain Report Names panel is displayed. Press **F4** in the Opt field next to the Report Name for which you would like to create Bursting Instructions. In the options window, select **option 2**, Bursting Instructions.

REP271 Report Bursting Instructions 13:24:29

Report Set : MIDSAL Northern Midwest Sales
 Report Name : MIDSAL Northern Midwest Sales
 Start at Segment : _____

Options I=Distribution ?=More Options

Opt	Report Segment	Page Location 1 and Compare Values		Page Location 2 and Compare Values	
		Line	Columns	Line	Columns
—	*REPORT	Line 10	Columns 14 to 30	Line	Columns to
1	MPLS	Weekly sales			
—					
—					
—					
—					
—					

F3=Exit F4=Prompt F12=Previous
 F21=System Command F22=Preceding Opt F23=Prev Options

3. The Report Bursting Instructions panel is displayed. Enter the line and column numbers for each segment. Enter the report segment name and the comparison value. After you enter this information press the **Enter** button to create the report segment. Select **option 1** for each of the report segments you defined. The Maintain Report Distributions panel is displayed. Distribution must be set up for each report segment.

Creating Bursting Instructions

Quick Tour 4: Creating Multiple Bursting Instructions with Banner Pages

```
REP216 Banner Page 16:36:46

Report Set . . . . . : MIDSales2 Northern Midwest Sales
Report Name . . . . . : MIDSales2 Northern Midwest Sales
Report Segment . . . . . : *REPORT
Segment Information:
  Description . . . . . : Northern Midwest Sales
  Processing Sequence . . . . . : 10
Banner Page Information:
  Print Banner Page . . . . . : N (A=Always,H=Never,P=Print w/report only)
  Print Recipient List . . . . . : N (A=Always,H=Never,P=Print w/report only)
  Laser Command . . . . . : SALES (F4=Prompt)
  Title Lines . . . . . : WEEKLY SALES
                          RESULTS
Instructions . . . . . : Deliver to Phil

F3=Exit          F4=Prompt          F12=Previous
F21=System Command  F22=Preceding Opt  F23=Prev Options
```

- The Banner Page panel displays. Enter an **A** under the Print Banner Page field to always print a banner page for the segment, an **N** if you never want to print a banner page (default), or a **P** to print the banner page for segments that are not being bundled and have an output code of PRINT or BOTH, or are printed on demand by a recipient. Do the same as above for the Print Recipient List field. In the Laser Command field, enter the name of a special laser command (if desired) for the banner page. Enter the title that you want the banner page to display in the Title Lines field. In the Instructions field, enter any special instructions that you want printed on the banner page.

The banner page will print as the first page of the report.

```
10/21/03 REP412P
9:23:35
*****
**
**
**
**
**
**
**
**
**
**
**
**
**
*****
*****
  Deliver to Phil
```

Quick Tour 5: Creating Bursting Instructions with *REMAINDER

REP201 Mainta

Start at Report Set : _____
 Search Description for : _____

Options
 A=Add/Copy/Delete I=Select

Opt	Report Set	Description
—	GMREPORTS	Good Morning
—	MID	Midwest Sales Repor
—	MID	Northern Midwest Sa
—	MID	Midwest Sales Repor

REP701
I=Select Option

— Report Set Information

— 1=Report Set Detail

— 2=Report Set Text

— Report Name Information

— 3=Report Names

— 4=Bursting Instructions

— Advanced Options

— Report Processing Info

— 6=Archive History

— 7=Processing History

— 8=Access History

— 9=Link to ROBOT Job

F3=Exit F11=More Info Bottom

F3=Exit F4=Prompt F6=Add Record F9=Select Search
 F12=Previous F21=System Command F22=Preceding Opt F23=Prev Options

1. The *REMAINDER segment automatically contains all of the information that is left in a report when segmenting is complete. Use the *REMAINDER segment to determine if you need more segmenting, or just to see all of the left over information.

When you have defined your report set as described earlier, press **F4** in its Opt field to display the options window. Select **option 3**, Report Names.

REP207 Mainta

Report Set : MIDSAL
 Start at Report Name : _____
 Search Description for : _____

Options
 A=Add/Copy/Delete I=Select

Opt	Report Name	Description
—	MIDSALES2	Northern Midwest S

REP701
I=Select Option

— Report Name Information

— 1=Report Name Detail

— 2=Bursting Instructions

— 3=Print Bursting Instructions

— Advanced Options

F3=Exit F11=More Info Bottom

F3=Exit F4=Prompt F6=Add Record
 F12=Previous F21=System Command F22=Preceding Opt F23=Prev Options

2. The Maintain Report Names panel is displayed. Press **F4** in the Opt field next to the Report Name for which you would like to create Bursting Instructions. In the options window, select **option 2**, Bursting Instructions.

REP271 Report Bursting Instructions 10:13:46

Report Set : MIDSAL2 Northern Midwest Sales
 Report Name : MIDSAL2 Northern Midwest Sales
 Start at Segment : _____

Options I=Distribution ?=More Options

Opt	Report Segment	Page Location 1 and Compare Values		Page Location 2 and Compare Values	
		Line	Columns	Line	Columns
—	*REPORT	10	14 to 30	—	—
—	MPLS	Weekly sales			
—	*REMAINDER				
—					
—					
—					
—					
—					

F3=Exit F4=Prompt F12=Previous
 F21=System Command F22=Preceding Opt F23=Prev Options

3. The Report Bursting Instructions panel displays.

If you have not done so already, enter the line, column, report segment name, and the comparison value for the other segments. Enter the *REMAINDER segment at the end of the list. You do not need to specify line and columns for the *REMAINDER segment—whatever you did not specify for the other segments (the leftover) will go into the *REMAINDER segment.

Quick Tour 6: Creating Bursting Instructions with Two Compare Values

REP201 Maintain

Start at Report Set : _____
 Search Description for : _____

Options
 A=Add/Copy/Delete I=Select

Opt	Report Set	Description
—	GMREPORTS	Good Morning
—	MID	Midwest Sales Report
—	MID	Northern Midwest Sa
—	MID	Midwest Sales Report

REP701
I=Select Option

— Report Set Information

— 1=Report Set

— 2=Report Set Text

— Report Name Information

— 3=Report Names

— 4=Bursting Instructions

— Advanced Options

— Report Processing Info

— 6=Archive History

— 7=Processing History

— 8=Access History

— 9=Link to ROBOT Job

F3=Exit F11=More Info Bottom

F3=Exit F4=Prompt F6=Add Record F9=Select Search
 F12=Previous F21=System Command F22=Preceding Opt F23=Prev Options

- Occasionally, you may want to use more than one comparison value to create Bursting Instructions. When you have defined your report set (described earlier), press **F4** in the Opt field next to the report set. In the options window, select **option 4**, Bursting Instructions.

REP271 Report Bursting Instructions 10:36:46

Report Set : MIDSales2 Northern Midwest Sales
 Report Name : MIDSales2 Northern Midwest Sales
 Start at Segment : _____

Options I=Distribution ?=More Options

Opt	Report Segment	Page Location 1 and Compare Values		Page Location 2 and Compare Values	
		Line	Columns	Line	Columns
—	*REPORT	10	14 to 30	10	31 to 80
—	*REMAINDER				
1	MPLS	Weekly sales		Bi-weekly sales	
—					
—					
—					
—					
—					

F3=Exit F4=Prompt F12=Previous
 F21=System Command F22=Preceding Opt F23=Prev Options

- The Report Bursting Instructions panel displays. Enter the report segment name, the line and column numbers for the first comparison value, the first comparison value, the line and column numbers for the second comparison value, and the second comparison value.

After you enter this information press **Enter** to create the report segment. You must specify distribution for each report segment. Select **option 1** for each segment you defined.

REP241 Maintain Report Distributions 10:38:24

Report Set : MIDSales2 Northern Midwest Sales
 Report Name : MIDSales2 Northern Midwest Sales
 Report Segment : MPLS Northern Midwest Sales
 Start at Distributed To : _____

Options
 A=Add/Copy/Delete I=Select ?=More Options

Opt	Distributed To	Output Code	Bundle Code	Nbr of Copies	Report View
—	ANGIE	PDF	N		*STANDARD
—	BOB	VIEW	N		*STANDARD
—	BRIAN	BOTH	N	1	*STANDARD
—	CHRIS	FICHE	N		*STANDARD
—	DAVE	HTML	N		*STANDARD
—	PAT	PRINT	N	1	*STANDARD
—	PAUL	CLIENT	N		*STANDARD

F3=Exit F4=Prompt F6=Add Record F9=Select Search
 F12=Previous F21=System Command F22=Preceding Opt F23=Prev Options

- The Maintain Report Distributions panel displays. You can add, copy, delete, or change distribution records. Quick Tour 2 shows a detailed example of changing distribution for a report.

Creating a Segment Using OPAL

Quick Tour 7: Creating a Report Segment Using OPAL

```

REP201                               Mainta
Start at Report Set . . . . . : _____
Search Description for . . . . . : _____
Options
A=Add/Copy/Delete      I=Select
0
REP707                               Options      11:26:30
I=Select Option
  Report Name Options
  - 11=Report Print File Overrides
  - 12=Report Indexes
  - 13=Report Views
  Report Segment Options
  1 14=Report Segments
  - 15=Scan/Replace OPAL Values
  Bottom
F3=Exit F11=More Info F12=Cancel
F
F
d Record      F9=Select Search
receding Opt  F23=Prev Options
  
```

1. You can use Report Segment OPAL to define more advanced report segments. Create a report set with an OPAL Processing type of 1 or 3 on the Report Name panel. Then, on the Maintain Report Sets panel, press **F4** in the Opt field next to the report set. In the Options window, select **Advanced Options**. The advanced options window displays. Select **option 14**, Report Segments.

```

REP224                               Maintain Report Segments      13:30:55
Report Set . . . . . : MIDSAL53 Northern Midwest Sales w OPAL
Report Name . . . . . : SHARED Northern Midwest Sales w OPAL
Start at Report Segment . . . . . : _____
Search Description for . . . . . : _____
Options
A=Add/Copy/Delete      I=Select      ?=More Options
Processing
Opt  Report Segment  Description  Sequence
_   *REPORT          Northern Midwest Sales w OPAL  10
F3=Exit      F4=Prompt      F6=Add Record  F9=Select Search
F12=Previous F21=System Command F22=Preceding Opt F23=Prev Options
  
```

2. The Maintain Report Segments panel lists all the report segments defined for the report set and report name. Press **F6** to add a new report segment.

```

REP239                               Report Segment      13:47:37
Report Set . . . . . : MIDSAL53 Northern Midwest Sales w OPAL
Report Name . . . . . : SHARED Northern Midwest Sales w OPAL
Report Segment Information:
Report Segment . . . . . : MPLS
Description . . . . . : Northern Midwest Sales w OPAL
Processing Sequence . . . . . : 10
Report Paging Options
Retain Paging . . . . . : Y (Y=Yes,N=No)
Last heading line . . . . . : (1 - 255)
Report Segment Overrides (leave blank to default)
Overflow line number . . . . . : (1 - 255)
Page length . . . . . : (1 - 255)
Page width . . . . . : (1 - 378)
Characters per inch . . . . . : (5, 10, 12, 13.3, 15, 16.7, 18, 20)
Lines per inch . . . . . : (3, 4, 6, 7.5, 8, 9, 12)
Laser Command Name . . . . . : (F4=Prompt)
F3=Exit      F4=Prompt      F6=Add/Copy/Delete  F10=Next
F12=Previous F21=System Command F22=Preceding Opt  F23=Prev Options
  
```

3. Use the Report Segment panel to define a report segment for a report. The Report Set and Report Name are filled in. Enter the name and a brief description of the new report segment. (You can leave the override fields blank.) Press **F12** to return to the Maintain Report Segments panel.

Quick Tour 7: Creating a Report Segment Using OPAL

```

REP224          Maintain R
Report Set . . . . . : MIDSAL
Report Name . . . . . : SHARED
Start at Report Segment . . . :
Search Description for . . . . :
Options
A=Add/Copy/Delete      I=Select

Opt Report Segment  Descript
-- *REPORT          Northern Midwest
-- IOWA             Northern Midwest

REP701
I=Select Option

Report Segment Information
-- 1=Report Segment Detail
1 2=Segment OPAL
-- 3=Add Report Segment Security
-- 4=Print OPAL Code
-- 5=Report Distribution
-- 6=Enter Banner Instructions
-- 7=Delete Banner Instructions
-- 8=Resegment this Report

F3=Exit  F11=More Info  Bottom

F3=Exit      F4=Prompt      F6=Add Record      F9=Select Search
F12=Previous F21=System Command F22=Preceding Opt  F23=Prev Options
  
```

- The new report segment you just defined has been added to the list. Press **F4** in the Opt field. The Report Segment Information window displays. Select **option 2**, Segment OPAL.

```

REP240          OPAL Report Segment          13:41:50
Report Set . . . . . : MIDSAL     Northern Midwest Sales w OPAL
Report Name . . . . . : SHARED    Northern Midwest Sales w OPAL
Report Segment . . . . : MPLS     Northern Midwest Sales w OPAL
Start at Sequence . . . :
Logic          Column
Operand Variable Line Beg End Operation Operation Values Seq
IF           3 14 17 EQ MPLS 10
THEN
*           INCPAG 20
*           INCLUDE IF MPLS IS 30
*           IN THE TITLE 40
QUITPAGE 50
ELSE
QUITPAGE 70
END 80
90
100
110
1 +

F3=Exit  F4=Prompt  F7=ROBOT Variables  F12=Previous  F14=Services
F18=Resequence  F19=Logic Check  F22=Preceding Opt  F23=Prev Options
  
```

- Use the OPAL Report Segment panel to enter the OPAL code for the segment MPLS. In this example, the report heading on line 3 will be checked for the word "MPLS." If the word "MPLS" is found, that page of the report will be included in the report segment. Press Enter to record your code entry. (Your syntax will be checked automatically.) Press **F3**.

```

REP240          OPAL Report Segment          13:42:34
Report Set . . . . . : MIDSAL     Northern Midwest Sales w OPAL
Report Name . . . . . : SHARED    Northern Midwest Sales w OPAL
Report Segment . . . . : MPLS     Northern Midwest Sales w OPAL
Start at Sequence . . . :
Logic          Column
Operand Variable Line Beg End Operation Operation Values Seq
IF           3 14 17 EQ MPLS 10
THEN
*           INCPAG 20
*           INCLUDE IF MPLS IS 30
*           IN THE TITLE 40
QUITPAGE 50
ELSE
QUITPAGE 70
END 80
90
100
110
1 +

REP244
Do you wish to create the OPAL program
at this time?  Y (Y=Yes, N=No)

F3=Exit  F12=Previous

F3=Exit  F4=Prompt  F7=ROBOT Variables  F12=Previous  F14=Services
F18=Resequence  F19=Logic Check  F22=Preceding Opt  F23=Prev Options
  
```

- When you set up OPAL code for a segment for the first time (or if you change your code later), you are given the option of creating an OPAL program when you exit the panel. Enter a **Y** to create or revise the program immediately. Press **F3** to exit the window without compiling the program and return to the Maintain Report Segments panel.

Creating a Segment Using OPAL

Quick Tour 7: Creating a Report Segment Using OPAL

```
REP224          Maintain Report Segments          13:43:22

Report Set . . . . . : MIDSALE53 Northern Midwest Sales w OPAL
Report Name . . . . . : SHARED Northern Midwest Sales w OPAL
Start at Report Segment . . . : _____
Search Description for . . . . : _____

Options
A=Add/Copy/Delete      I=Select      ?=More Options

Opt  Report Segment  Description              Processing
---  *REPORT         Northern Midwest Sales w OPAL  10
---  MPLS            Northern Midwest Sales w OPAL  10  CHANGED
```

F3=Exit F4=Prompt F6=Add Record F9=Select Search
F12=Previous F21=System Command F22=Preceding Opt F23=Prev Options

- The new report segment now shows an OPAL Status of CHANGED. This status means you have changed (created or edited) the segment's OPAL code. When this field returns to a blank status, it means your code has generated and compiled (you receive a completion message), and is ready to run.

Quick Tour 8: Creating Exception Distribution

```

REP291      Report Sets Menu      15:14:52

Maintain Report Set Objects
  1. Robot GUIDE for Automated Report Setup
  2. Maintain Report Sets
  3. Copy Report Set

Maintain Other Report Objects
  4. Maintain Laser Command Names
  5. Maintain Exception Distribution Objects
  6. Maintain OPAL Tables
  7. Report Programs Changed Listing

Select Option:  _

F3=Exit    F12=Previous    F21=System Command
  
```

1. Under normal circumstances, distribution occurs whenever a report is run. There may be times when you only want distribution to occur on a specific day of the week or month. You use exception distribution to tell Robot Reports when *not* to distribute reports. From the Report Sets Menu, enter **option 5**. The Maintain Exception Distribution Objects panel displays.

```

REP272      Maintain Exception Distribution Objects      14:06:25

Start List of Object: _____

Options
A=Add/Copy/Delete    I=Select    ?=More Options
Exception
Opt  Objects      Description      OPAL Status  Run Status
---  ---
---  *REMAINDER    EXCEPTION FOR *REMAINDER
---  *REPORT        EXCEPTION FOR *REPORT
---  ADMINRPTS     TEST FOR ADMIN REPORTS
---
---
---
---
---
---
---
---
---
More...

F3=Exit    F4=Prompt    F6=Add Object    F21=System Command
  
```

2. Press **F6** to add an exception distribution object. The Exception Distribution Object Maintenance panel displays.

```

REP273      Exception Distribution Object Maintenance      14:06:58

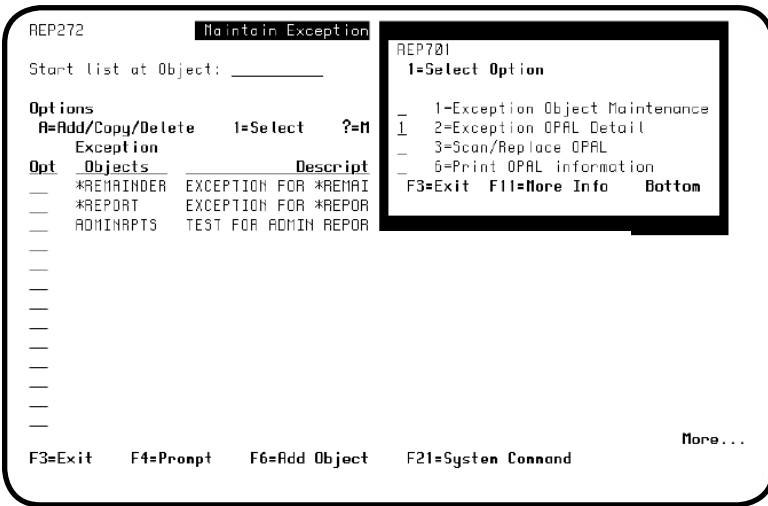
Exception Object Name . . : LABSDAY
Description . . . . . : Distribute the last day of the month
Make Inactive . . . . . : N (Y=Yes,N=No)

F3=Exit    F12=Previous    F21=Command Line
  
```

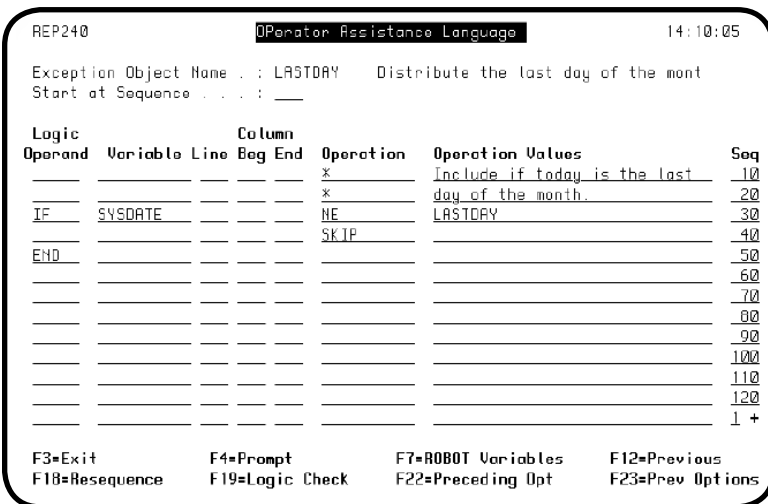
3. Enter the name and a brief description of the Exception Distribution Object that you want to create. When you are finished, press **F3** to return to the Maintain Exception Distribution Objects panel.

Creating Exception Distribution

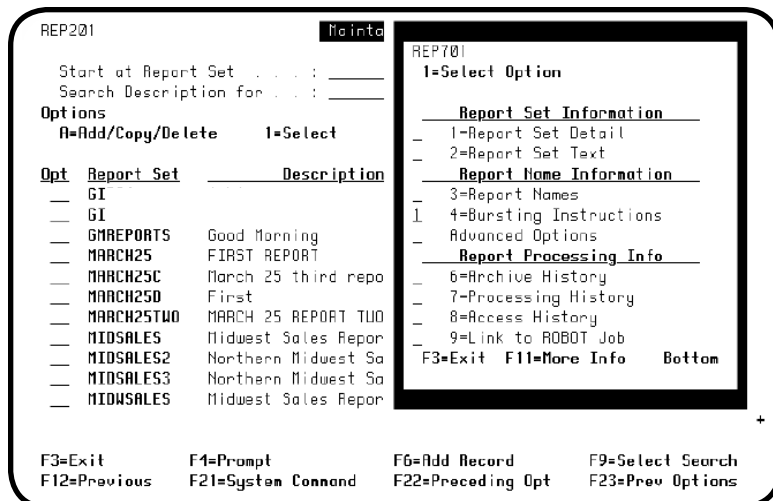
Quick Tour 8: Creating Exception Distribution



- Press **F4** in the Opt field next to the exception distribution object you created. The options menu displays. Select **option 2**, Exception OPAL Detail. The OPERator Assistance Language panel displays.



- Enter OPAL code to define the exception distribution for this recipient. In this example, if the last day is not equal to the system date, there is no distribution. This makes distribution occur only on the last day of the month. When you press **F3** to exit this panel, you are asked whether you want to create OPAL. Enter a **Y** to create the exception distribution object OPAL. After Robot Reports is done checking and compiling your OPAL code, you return to the Maintain Exception Distribution Objects panel.



- Press **F3** to exit the Exception Distribution Object panels. Go to the Maintain Report Sets panel. Press **F4** in the Opt field next to the report set for which you want to create exception distribution. The options menu displays. Select **option 4**, Bursting Instructions. The Report Bursting Instructions panel displays.

Creating Robot Schedule Date Objects

Quick Tour 9: Creating Robot Schedule Date Objects

```

RBT8003                               Edit Date Objects                               14:31:52
Date Object: HOLIDAYS                   Exception dates - For REPORTS
Date Object Type: OMIT

SEPTEMBER 2003                          OCTOBER 2003                            NOVEMBER 2003
S M T W T F S                          S M T W T F S                          S M T W T F S
 01 02 03 04 05 06                      01 02 03 04                            01
07 08 09 10 11 12 13                    05 06 07 08 09 10 11                  02 03 04 05 06 07 08
14 15 16 17 18 19 20                    12 13 14 15 16 17 18                  09 10 11 12 13 14 15
21 22 23 24 25 26 27                    19 20 21 22 23 24 25                  16 17 18 19 20 21 22
28 29 30                                  25 27 28 29 30 31                    23 24 25 26 27 28 29
                                           30

DECEMBER 2003                           JANUARY 2004                             FEBRUARY 2004
S M T W T F S                           S M T W T F S                           S M T W T F S
 01 02 03 04 05 06                      01 02 03                                01 02 03 04 05 06 07
07 08 09 10 11 12 13                    04 05 06 07 08 09 10                  08 09 10 11 12 13 14
14 15 16 17 18 19 20                    11 12 13 14 15 16 17                  15 16 17 18 19 20 21
21 22 23 24 25 26 27                    18 19 20 21 22 23 24                  22 23 24 25 26 27 28
28 29 30 31                              25 26 27 28 29 30 31                  29

F3=Exit      F12=Previous    F14=Clear    F20=Select omit date
F21=Command Line
Omit date activated.
  
```

1. Robot Reports can use Robot Schedule Date Objects for exception distribution. On the Robot Schedule Edit Date Objects panel, select the dates you *do not* want distribution to occur for the recipient. In this example, distribution will not occur on the holidays selected. For more information on setting up and using Robot Schedule Date Objects, refer to the *Robot Schedule User Guide*.

2. Follow steps 6 through 9 of Quick Tour 8, Creating Exception Distribution, to access the Report Distribution Control Options panel. Under the Exception Distribution Options field, enter the Robot Schedule Date Object that you want Robot Reports to execute for this recipient. Press **F4** for a list of Robot Schedule Date Objects.

```

REP253                               Report Distribution Control Options                               14:44:17

Report Set . . . . . : MIDSALLES2 Northern Midwest Sales
Report Name . . . . . : MIDSALLES2 Northern Midwest Sales
Report Segment . . . . : *REPORT Northern Midwest Sales
Distributed To . . . . : BEN
Output Code . . . . . : UIEU

Distribution Overrides:
Hold Spool File . . . : _ (Y=Yes,N=No)
Save Spool File . . . : _ (Y=Yes,N=No)
Laser Command Name . . : _____ (F4=Prompt)
Form Type . . . . . : _____
User Data . . . . . : _____ Output Priority . . . . : _
Print Text . . . . . : _____

Exception Distribution Options:
Execute Exception Distribution Object . . . . . : _____ (F4=Prompt)
Don't distribute on dates listed in ROBOT Date Object: HOLIDAYS (F4=Prompt)

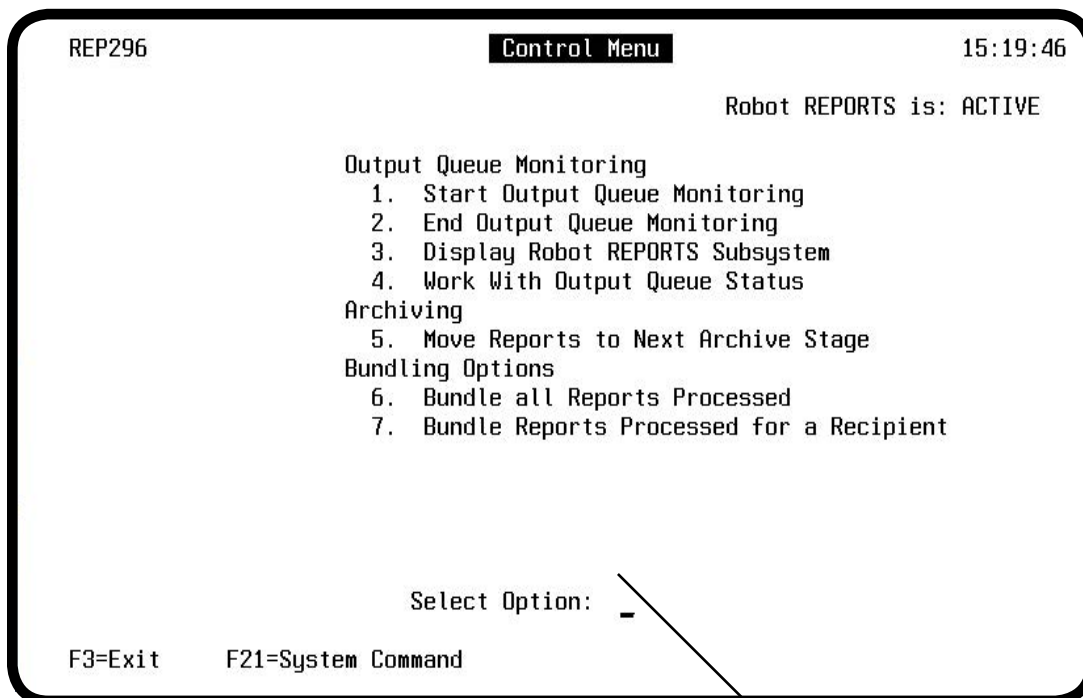
F3=Exit      F1=Prompt      F12=Previous
F21=System Command F22=Preceding Opt F23=Prev Options
  
```

Report Bundling—REPBUNDLE

You can set up a Robot Schedule job to run the REPBUNDLE command. REPBUNDLE(*ALL) bundles *all* reports that have been processed and are waiting in bundle-ready (BUNDLERDY) status since the last time the command was run. Optionally, you can enter the command from a command line, or select **option 6** on the Control Menu to bundle your reports.

The REPBUNDLE command bundles the reports into packets and prints them. It bundles them according to the output priority specified on the Recipient Bundling Options panel. (For example, people who arrive at work early in the morning should have higher priority to make sure their reports are ready for them when they arrive.)

The order of the reports in the packet is determined by the recipient—they enter this information in the report sequence field of the Recipient Report Access panel.



Select **option 6**, Bundle all Reports Processed, to have Robot Reports bundle all bundle-ready reports into packets and print them. A confirmation window displays to verify that you want to continue.