

# PEERNET Reports Tutorial

## Create a Basic Report

This tutorial will guide you through the process of creating a basic sales report using PEERNET Reports. This tutorial assumes that PEERNET Reports has already been downloaded, installed on your hard drive, and licensed. If you have not already done so, please complete those steps before continuing with this tutorial.

As well, in order to use this tutorial you must first download sample database files from the PEERNET website. Download links and installation instructions for these files can be found at the following web address:

<http://www.peernet.com/reports/tutorials.html>

Along with the sample database files, this download also includes a sample project file (**CreateBasicReport.PNJ**) which reflects the results of this tutorial. After downloading, this project file will appear in the **Sample Projects** list when you launch PEERNET Reports Designer.

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By the end of this tutorial you will have created a basic sales report, and you will know how to:

- launch PEERNET Reports Designer
- create a PEERNET Reports Designer project file
- link tables from an external database to your project file
- create a report in your project file using the Report Wizard
- add headers and footers to your report
- add design components to your report
- format design components on your report
- preview a print job and print your report

For complete details about the available features and commands found in PEERNET Reports Designer, consult the **PEERNET Reports Designer User Guide**.

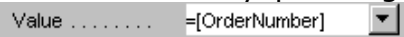
## Glossary of Tutorial Terms

The following terms are used throughout this tutorial. You should read this section and understand these terms before beginning the tutorial.

**Click** - Point to an item with the mouse pointer, then press and immediately release the left mouse button without moving the mouse.

**Double-click** - Point to an item with the mouse pointer, then press the left mouse button twice in rapid succession without moving the mouse.

**Drag** - Point to an item with the mouse pointer, then press and hold the left mouse button while you move the mouse. When you have moved the item to its desired position, release the mouse button.

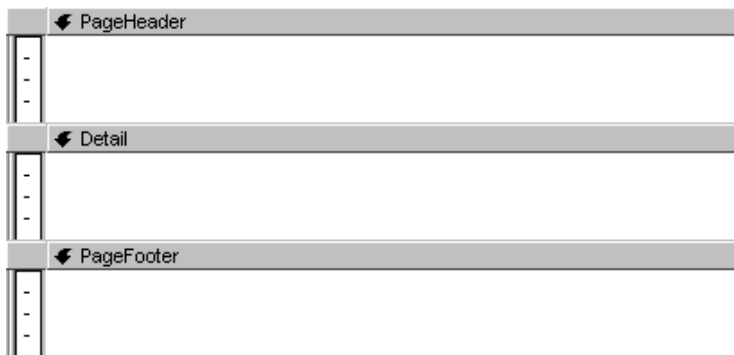
**Drop-down list** - An option list where items for selection are revealed by pressing a down-arrow button. For example, the **Value** drop-down list: 

**Path** - The location of a file, minus the file name. For example, the path of a file located at **c:\my documents\salesreport.doc** is **c:\my documents\**.

**Project Window** - The PEERNET Reports Designer project window is split into three sections. The **Project Pane** displays project items (tables, queries, reports, labels, etc.). The **Properties Pane** displays the property sheet for the currently selected sub-item (table, query, label, report, etc.), report section (report header, page header, detail, page footer, report footer), or design component (text field, bar code, rectangle, etc.). The **Design Window** displays the different views of your project items (design, code, record source, datasheet, SQL).

**Right-click** - Point to an item with the mouse pointer, then press and immediately release the right mouse button without moving the mouse.

**Section** - Reports are divided into sections. A report can have both a **Report Header** and a **Page Header** section, and both a **Report Footer** and a **Page Footer** section. There is also a **Detail** section in a report. You can add or remove header and footer sections as required for your report, and view and edit specific section properties.

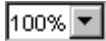


**Select** - Highlight or enable an item using the left mouse button or the appropriate keyboard commands.

## Navigating in PEERNET Reports Designer

You can use the zoom function, the horizontal and vertical rulers, the horizontal and vertical scroll bars, and the maximize/restore button to navigate and customize the appearance of the PEERNET Reports Designer application window.

### Zoom Function



The **Zoom** function allows you to see more of the design window at a reduced size. Available zoom options are **200%**, **150%**, **Normal**, **75%**, and **50%**. You can access the zoom function by clicking **View – Zoom – (Zoom Option)**, or by using the zoom drop-down list on the toolbar (shown above).

### Horizontal and Vertical Rulers



Horizontal and vertical rulers assist you in the design process; they are found at the top and on the left-hand side of the design window. You can use these rulers to line up the components (for example, text fields) that you place on a report.

### Horizontal and Vertical Scroll Bars



Horizontal and vertical scroll bars appear in the design window as required; you can use these scroll bars to reveal sections and components of your report that are currently off-screen. These scroll bars will not appear if your entire report fits into the design window.

### Maximize/Restore Button



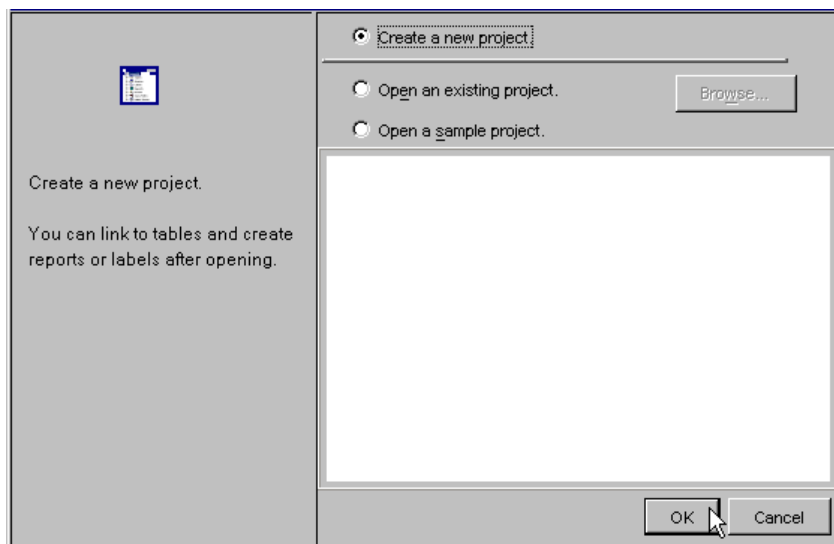
The maximize/restore button is found in the top-right corner of both the design window and the application window; it can be used to increase or decrease a window's size. The maximize button increases a window to its maximum size. The restore button decreases a window back to its previous size.

## Part 1 – Launch the application and create a new project file

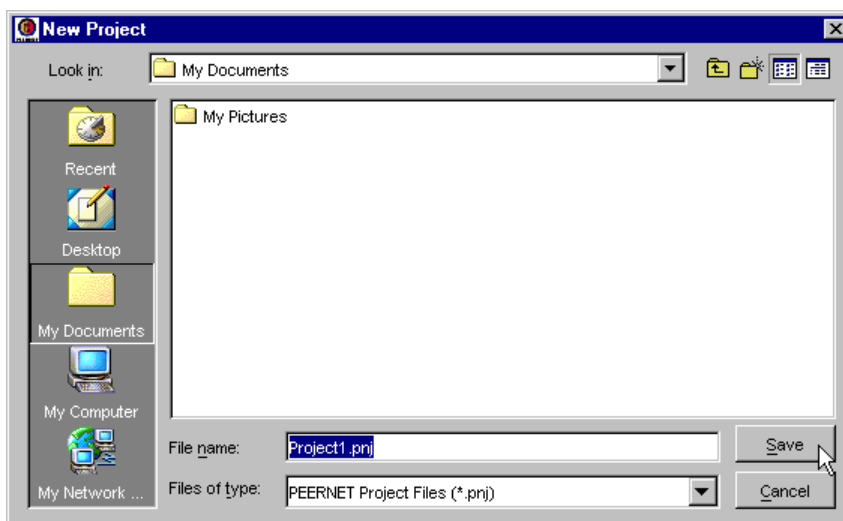
1. Double-click the **PEERNET Reports Designer** icon on your desktop.



2. Enable the **Create a new project** option.
3. Click **OK**.

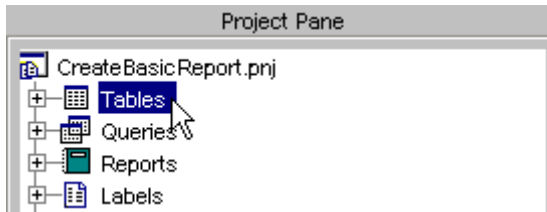


4. In the **File Name** field, type a name for the project file.
5. From the **Look in** drop-down list, select the location where you want to save the project file.
6. Click **Save**.



## Part 2 – Link an external database table to your project file

1. Double-click the **Tables** item in the **Project Pane**.



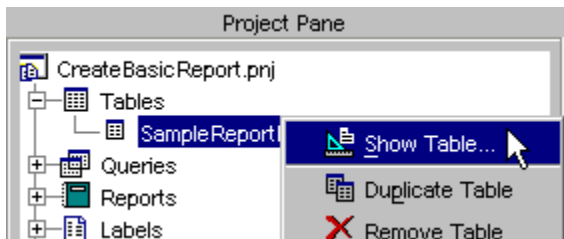
2. From the **Link Table** dialog box, select **JDBC Database**.
3. Click **Next**.
4. From the **Type** drop-down list, select **SimpleText JDBC Driver**.
5. In the **URI** field, type the path to the **SampleReportData.SDF** file you downloaded from the PEERNET website. So, if you saved the file to the location:

`c:\Program Files\PEERNETReportsXX\examples\basicreport\SampleReportData.SDF`

then you should type:

`c:\Program Files\PEERNETReportsXX\examples\basicreport\`

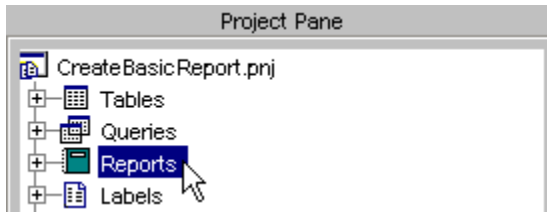
6. Click **Next**.
7. On the **Table** tab, click **SampleReportData**.
8. Click **Link**.
9. Click **Close**.
10. Click the **+** to expand the **Tables** item.
11. Right-click the **SampleReportData** sub-item, and click **Show Table**.



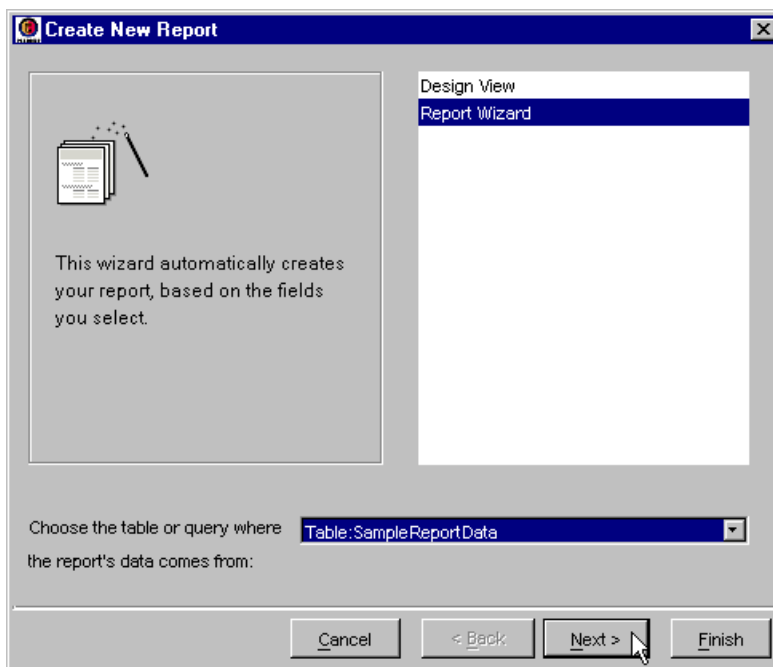
12. At the bottom of the **Design Window**, click the **Datasheet** tab; you are presented with the data in the table you have just added.

### Part 3 – Create a report and add headers and footers

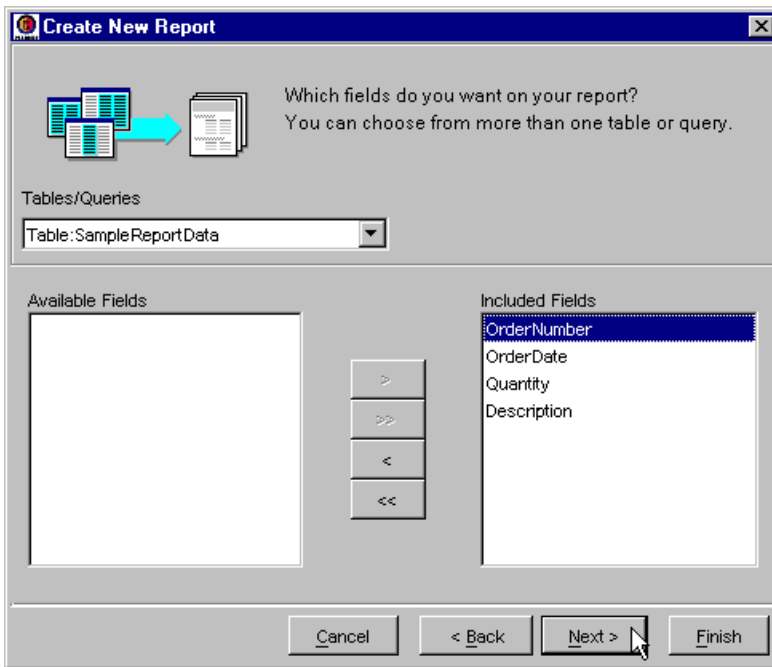
1. Double-click the **Reports** item in the **Project Pane**.



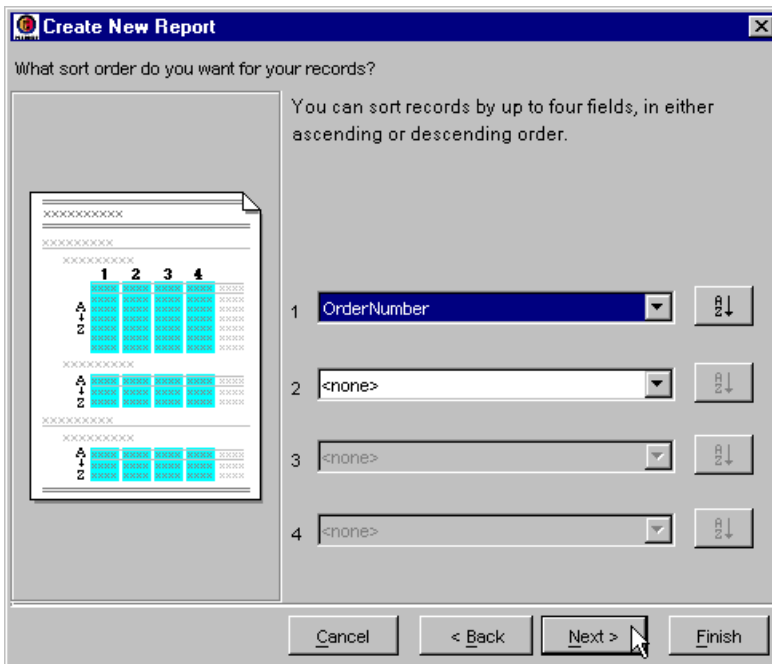
2. Select **Report Wizard** from the text field.
3. Select the table **SampleReportData** from the drop-down list.
4. Click **Next**.



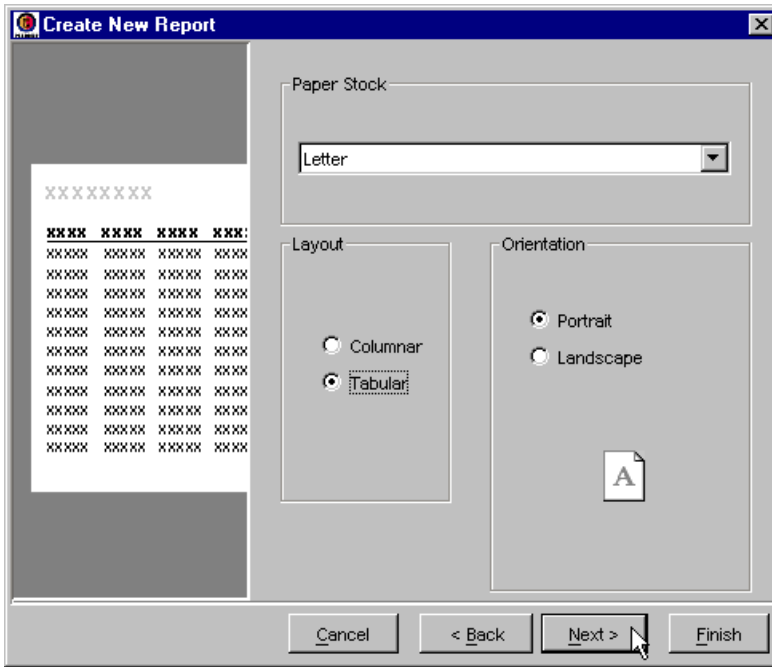
5. Click the **>>** button to add all available fields to your report.
6. Click **Next**.



7. From the first **Sort Order** drop-down list, select **OrderNumber**. This will result in your report fields being sorted in order of ascending order number.
8. Click **Next**.



9. From the **Paper Stock** drop-down list, select **Letter**.
10. Enable the **Tabular** layout option.
11. Enable the **Portrait** orientation option.
12. Click **Next**.



13. In the name field, type **Weekly Sales Report** as your report name.
14. Enable the **Design View** option.
15. Click **Finish**.



16. Your report is now created, and you are taken to the report's **Design View**. The name you gave the report (**Weekly Sales Report**) is added to the **Report Header**. The date you created the report and the page number is added to the **Page Footer**. The table fields you added to the report are added to the **Detail** section, while column headers for each of these fields are added to the **Page Header** section (see image on next page).



Report : Weekly Sales Report2

1 2 3 4 5 6 7 8

ReportHeader

# Weekly Sales Report

PageHeader

OrderNumber: OrderDate: Quantity: Description:

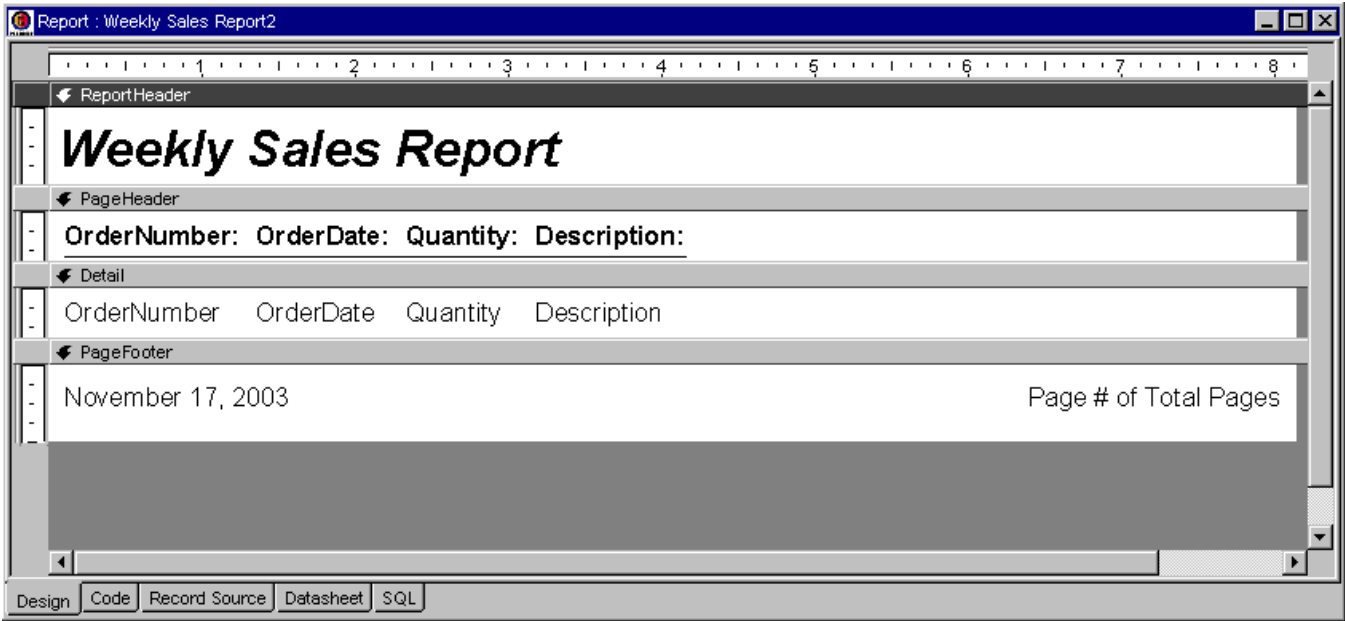
Detail

OrderNumber	OrderDate	Quantity	Description
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PageFooter

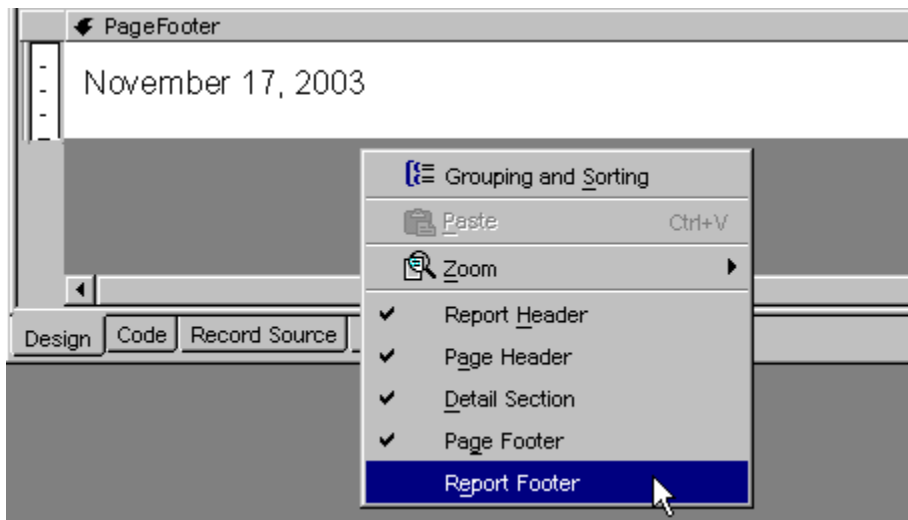
November 17, 2003 Page # of Total Pages

Design Code Record Source Datasheet SQL



## Part 4 – Add a Report Footer and a Totals field to your report

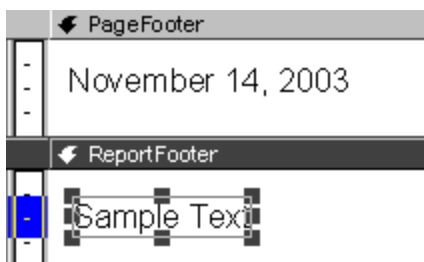
1. Right-click anywhere in the grey area of the report's **Design View** (the area below the **Page Footer** section and above the horizontal scroll bar and tabs).



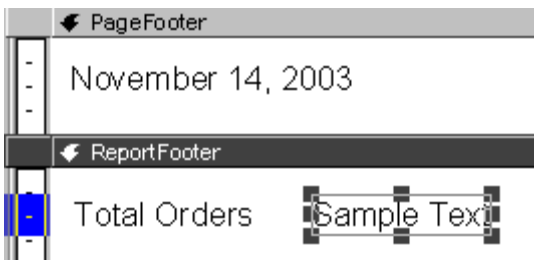
2. Click **Report Footer**. This will add a **Report Footer** section to your report.



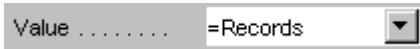
3. Click **Insert – Text Field**.
4. Click anywhere in the **Report Footer** section.
5. Drag the text field to the far left of the **Report Footer** section.



6. In the **Properties Pane**, in the **Sample Value** field, type **Total Orders**.
7. Press **ENTER**.
8. Click **Insert – Text Field**.
9. Click anywhere in the **Report Footer** section.
10. Drag the text field to the right of the previous text field.

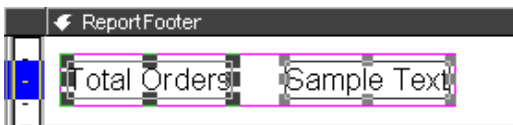


11. In the **Properties Pane**, from the **Value** drop-down list, select **=Records**. This function will add up the number of records (rows of data) found in the entire report, and display that total in this text field.

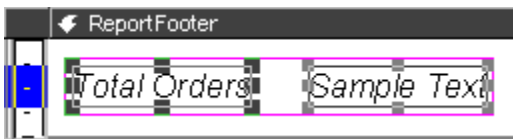


## Part 5 – Format the text fields and sections on your report

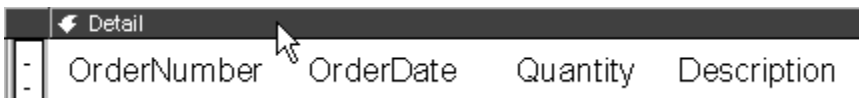
1. Select the **Date** text field in the **Page Footer** section.
2. On the toolbar, press the **Bold B** button.
3. Select the **Quantity** text field in the **Detail** section.
4. On the toolbar, press the **Center** button.
5. Select the **OrderDate** field in the **Detail** section.
6. On the toolbar, select **11** as the font size.
7. Select the **Description** text field in the **Detail** section.
8. In the **Properties Pane**, in the **Width** field, type **1.5** (if your display units are set to inches; if not, type the equivalent number of centimeters).
9. Press **ENTER**.
10. Click and hold the mouse button in the top-left corner of the **Report Footer** section, then move the arrow down and to the right to create a grey selection rectangle around the two text fields; the components will become outlined in pink.



11. On the toolbar, press the **Italics I** button.



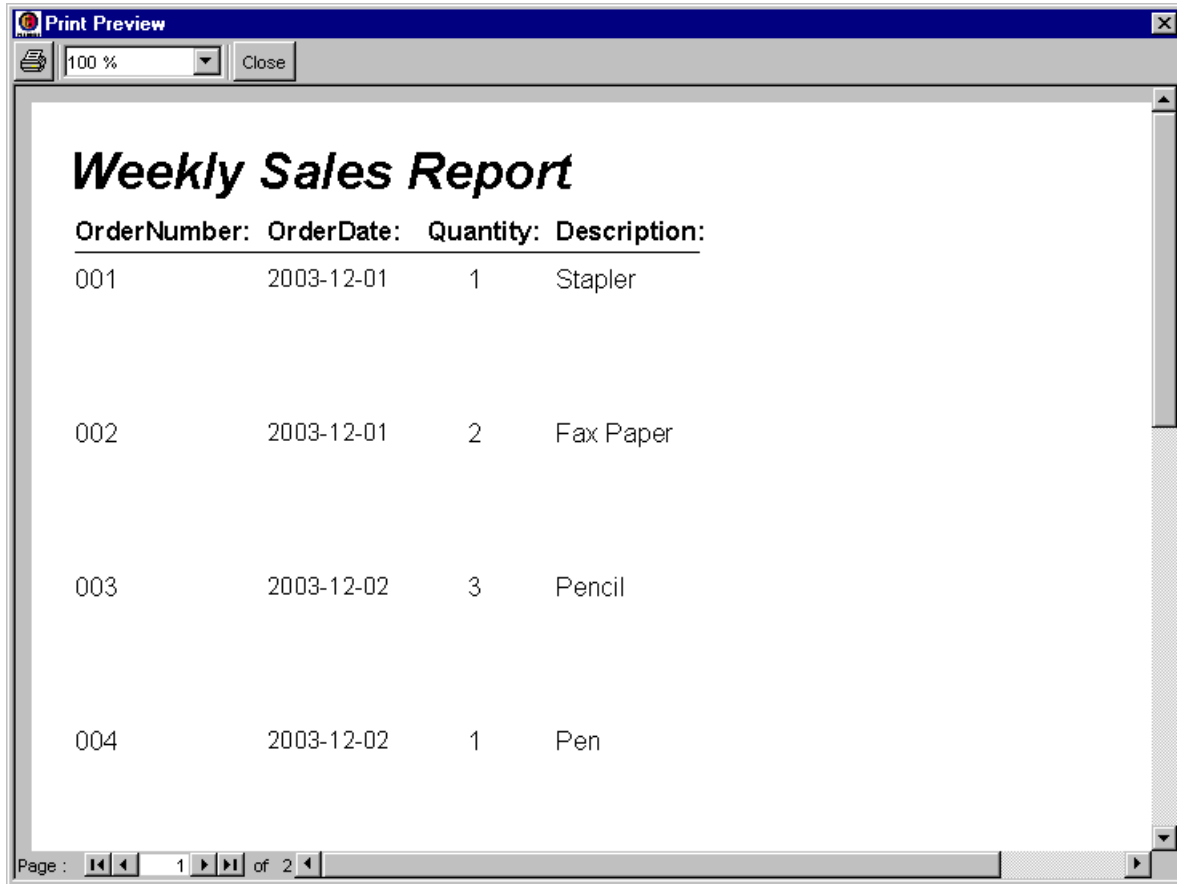
12. Click the section header for the **Detail** section.




13. In the **Properties Pane**, in the **Height** field, type **1.0** (if your display units are set to inches; if not, type the equivalent number of centimeters).
14. Press **ENTER**.

## Part 6 – Preview the print job and print your report

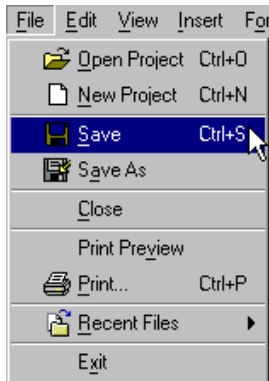
1. Click **File – Print Preview**.



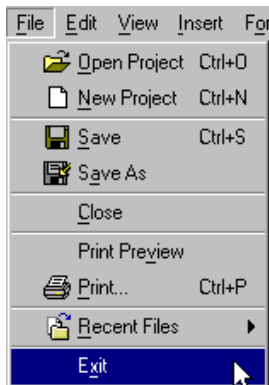
2. Click the printer  button.
3. From the **Name** drop-down list, select the printer to which you want to print.
4. Click **OK**.
5. Click **Close**.

## Part 7 – Save your project file and exit the application

1. Click **File – Save**.



2. Click **File – Exit**.



Congratulations! You have completed this tutorial and created a basic sales report. Your printed report is two pages long, and contains 15 sales records.

**For complete details about the available features and commands found in PEERNET Reports Designer, consult the PEERNET Reports Designer User Guide.**