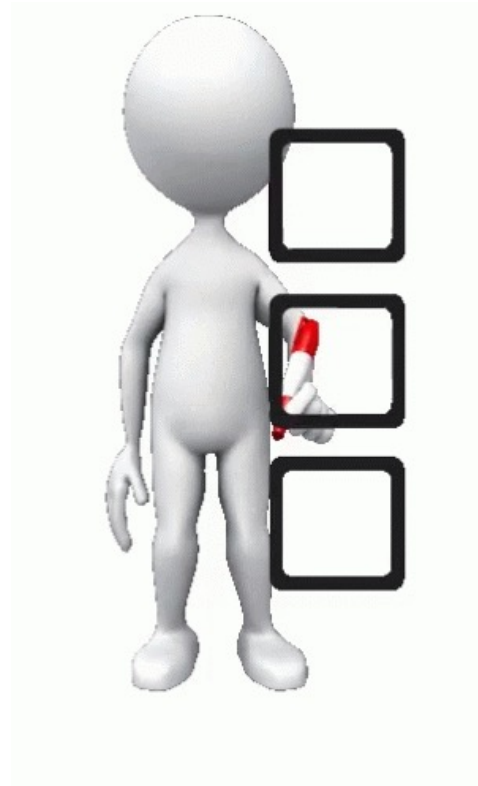


Report Generator [3-2]

Presented by: John Currey



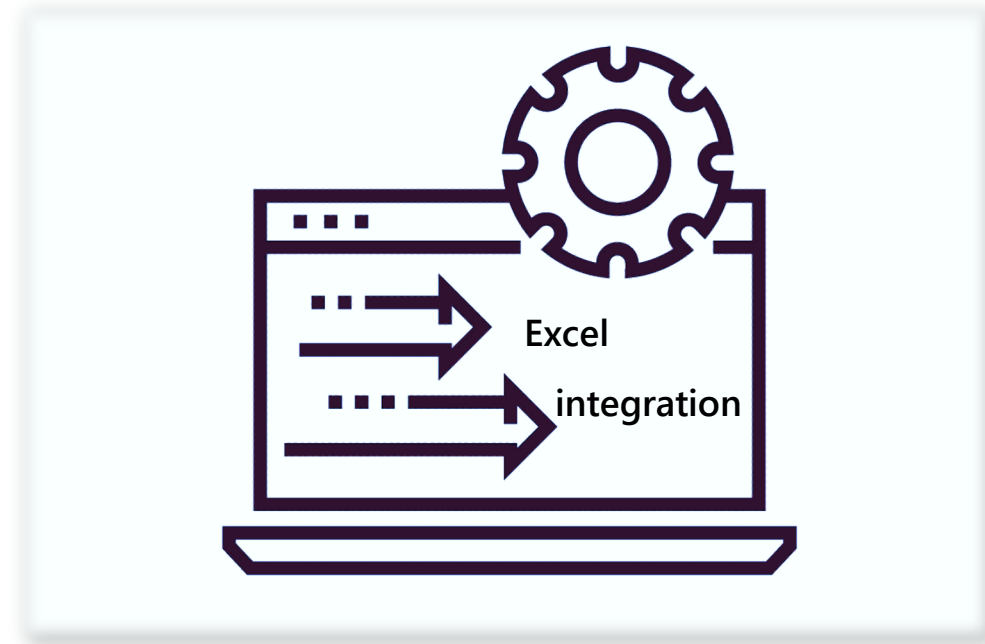
Report Generator [3-2]



- ☺ Report Generator Overview
- ☺ Report Configuration
- ☺ Report Options
- ☺ Optimization Thoughts
- ☺ Selection Criteria and Filtering
- ☺ Automation
- ☺ Advanced Stuff

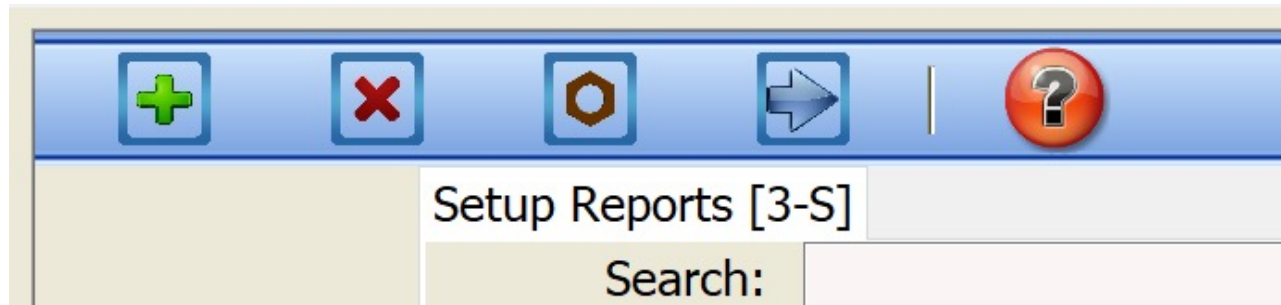
Report Generator Overview[3-2]

- Report Generator is a flexible power export tool
 - Lots of options
 - Tons of selection criteria
 - Slick Excel integration



Report Configuration [3-S]

☺ Add, Delete, Modify, Run, and Help



☺ Passwords to

- ☺ Modify Reports

- ☺ Run Reports

☺ Categories

- ☺ Organization



Report Configuration [3-S]

☺ Data Sources

☺ Character

- ☺ Includes data from various tables and “calculated fields” (e.g. status description)

☺ Numerical

- ☺ Includes data from various tables and “calculated fields” (e.g. interest, total remitted)

☺ Data Tables

- ☺ MASTER, DEBTOR, INFINITY, Diary, Screen 7, Courts, Banks, Adversary Attorneys, Employers, Property, Report Files, Related Parties

☺ Literal Text

☺ Text File Input

☺ Open or Closed Indicator

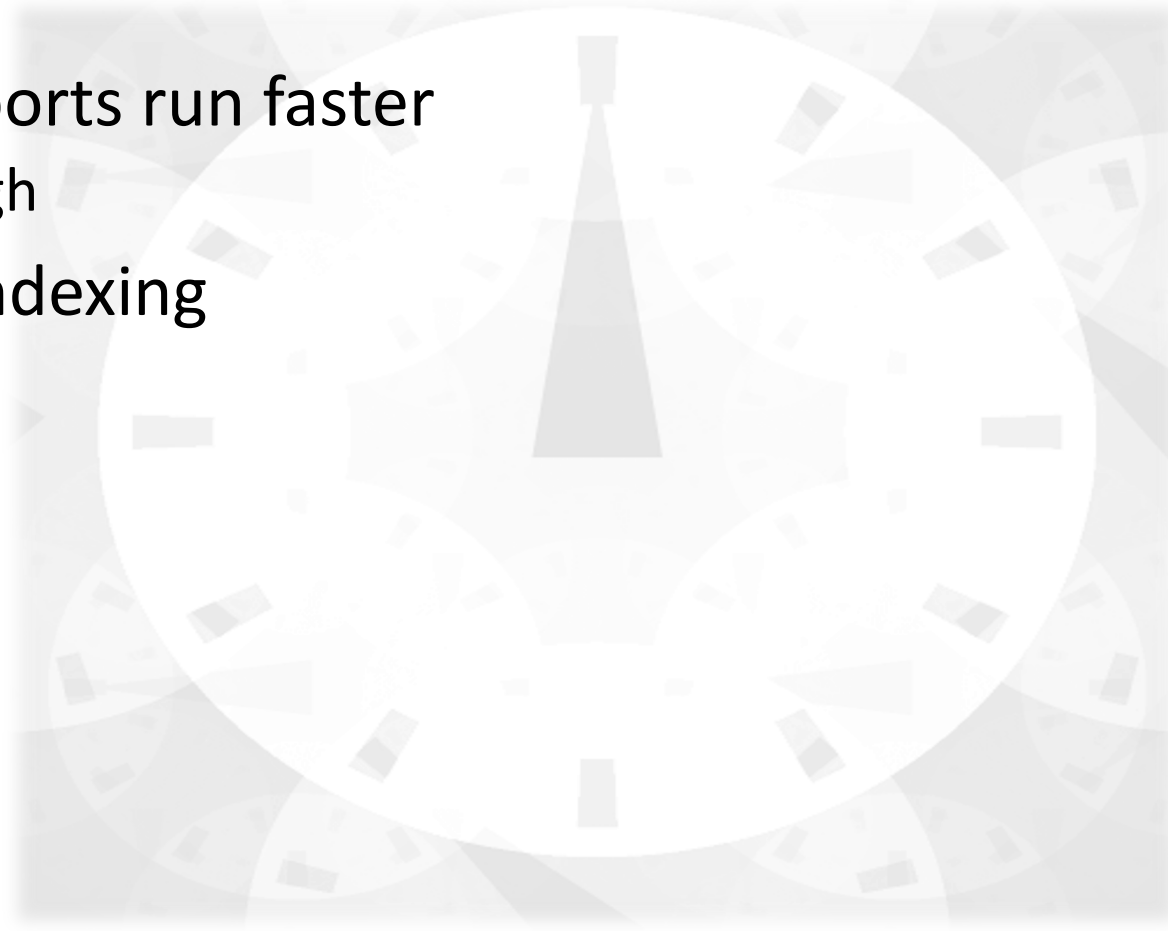
Report Options

- ☺ Report Selector
 - ☺ Searching and/or filtering by Category
- ☺ Report Title
 - ☺ Only used on standard output reports
- ☺ Includes/Excludes
 - ☺ Specific filtering options
- ☺ Printer Selection
- ☺ Source Filename
 - ☺ Cool external data source for reports
- ☺ Output
 - ☺ Defines report appearance
- ☺ Database
 - ☺ Open, closed, or both



Report Optimization Thoughts

- ⌚ Sort options make reports run faster
 - ⌚ Not considered enough
- ⌚ Taking advantage of indexing
 - ⌚ Saves time



Report Selection Criteria and Filtering

- Account Filters
 - Set low and high values
- Include Only Filters
 - Filter by Source File
- Advanced Filters
 - Include/Exclude Options
- Diary Filter Tab
 - Cool options
- More Filters
 - Slow and steady



Report Automation

- 🕒 Generate Automation INI
 - 🕒 Set it and forget it
 - 🕒 Use Windows CMDs and Task Scheduler to run your reports!



Advanced Stuff – Combine External Data

- Get data from an existing Excel file, CSV file, or tab-delimited file
- Run it through 3-2 and generate combined output
 - Data from the source file and Collection-Master one report
- Find Collection-Master data in source file by:
 - File Number
 - Forwarder File Number
 - Forwarder Reference Number
 - Co-counsel File Number
 - Docket Number

Advanced Stuff – Excel Formulas

🔄 Configure Excel formulas for 3-2 usage:

🔄 CLSINC\Reports\Excel_Formulas.txt

[A] ➔ `INDIRECT (ADDRESS (ROW (), "1"))`

[B] ➔ `INDIRECT (ADDRESS (ROW (), "2"))`

[C] ➔ `INDIRECT (ADDRESS (ROW (), "3"))`

[D] ➔ `INDIRECT (ADDRESS (ROW (), "4"))`



