Hand Receipt Holder Master Table of Contents

PAGE

PAGE

CHAPTER THREE

CHAPTER FOUR

What Is DPAS?

DPAS is a Windows based system that uses a Client/Server Graphical User Interface (GUI). Users are required to have a personal computer operating Windows (Windows 95, NT, etc.). The GUI provides a Multiple Document Interface, which allows a user to move from one process to another without exiting from current process.

DPAS provides on-line capability to support all functions that are associated with property accountability and equipment management. A small portion of the system functions is accomplished by batch processing of interface transactions or processing of summary report data. DPAS is an independent operation and does not require support from other systems for processing data. It can be used as a stand-alone property management system that provides general ledger control and depreciation schedule information to accounting systems, as well as documenting the physical control of installation equipment.

The system contains mandatory and optional modules available through a variety of toolbars containing buttons that will apply a command with one click of the mouse. The primary system functions include all actions associated with property management, accounting, equipment utilization, and preventive maintenance schedules.

The system provides the accountable officer with the capability to update item authorizations, cataloging actions, accountable record processing (e.g., receipts, turn-in, and inventory tracking/status), accounting depreciation data, serial number tracking, component visibility, and an automated document register. All input data is validated on-line prior to updating the database.

DPAS offers four different methods of managing equipment:

- **Serial** one item, one record.
- **Bulk** multiple items, one record.
- **System** group related items.
- **Kit** components of sets or outfits.

The system provides the equipment manager or responsible officer the ability to manage all actions associated with maintenance and equipment utilization. Work orders are automatically generated. The user can create and print trip tickets for all mobile equipment.

Warranty information for equipment is tracked.

DoDEquipment management data includes statistics developed for under and over utilized equipment and parts and repair costs for equipment maintenance. Data is also provided to support oil analysis programs.

Benefits of DPAS

- Regulatory financial and physical reporting of property, FMFIA and CFO compliance
- Integration of financial and property data
- Eliminate redundant systems and costs
- System interfaces to DoD migratory accounting systems
- Asset visibility and redistribution

CAPABILITIES: INVENTORY MANAGEMENT & FINANCIAL REPORTING

- Catalog of assets (serial & bulk)
- Supply interface capabilities
- Authorization tracking
- Automated Document Register
- Component visibility & tracking
- Hand Receipt & Sub Hand Receipt Holder capabilities
- Management of warranty/service/lease information
- Complies with DoD financial regulations.

History is maintained on most transactions.

CAPABILITIES: EQUIPMENT TRACKING

- Automated build of skeleton maintenance record
- Automated preventive maintenance scheduling
- Complete utilization reporting
- System-generated work orders & trip tickets
- Maintenance/breakdown/repair hours tracking
- Historical maintenance/utilization data

CAPABILITIES: REPORTING

- Over 100 pre-formatted reports available in DPAS
- *Eureka* Report Designer included with DPAS allows the user to create customized reports

DPAS Course Goals and Objectives

The DPAS manual is extensive, covering everything available for use in the DPAS system. However, depending on your Activity/Agency, you may or may not cover all aspects of the system. Below are the overall *minimal* course objectives of the DPAS course.

Our goal is not to make DPAS experts, but rather to ensure that the student comprehends and demonstrates mastery of the basic user functions covered in Phase One of the DPAS training course.

- ❑ By the end of training, the user needs to be able to print out a Hand Receipt, and demonstrate understanding of how to:

  - add to;
  - designate as excess; and
  - delete items from the Hand Receipt.

- ❑ This includes using not only the Hand Receipt module, but also performing actions in all other modules required to satisfy DoD agency-specific DPAS use, which may or may not include:

  - adding to or querying the Catalog;
  - adding Authorizations;
  - generating appropriate document numbers in the Document Register module;
  - processing transactions in the Hand Receipt, i.e., property book, itself; and
  - activating capital assets for depreciation.

Interfaces

DPAS has the ability to interface with several external systems. These interfaces allow DPAS to receive data, provide data, or communicate interactively depending on the system interface.

Catalog Interfaces:

DPAS contains interfaces with the following sources of asset catalog information:

- SB-700-20
- FEDLOG
- AMDF

Army Unique Item Tracking (UIT) Interface:

DPAS supports a one way interface for UIT reconciliation through CBS-X.

Accounting Interfaces:

DPAS supports interfaces with a number of accounting systems, including:

- SIFS
- IFAS
- e-Biz
- LMP
- DBMS
- WAAS
- DWAS

Real Property Interfaces:

DPAS supports interfaces with a number of Real Property systems, including:

- IFS
- PRIDE

Excess Interface:

DPAS provides a means for excess assets to be reported electronically to the DRMS Automated Information System (DAISY).

Supply Interfaces:

DPAS will interface with the following supply support systems:

- AMCISS US Army Materiel Command
- SARSS-O US Army
- BOSS Various DoD Agencies. This is a one way interface
- DMLLS Various DoD Agencies. This is a one way interface
- DAAS Various DoD Agencies. This is a one way interface
- CORAS DISA Westhem

Logging Into DPAS For The First Time

INTRODUCTION

This process shows you how to log into DPAS for the very first time.

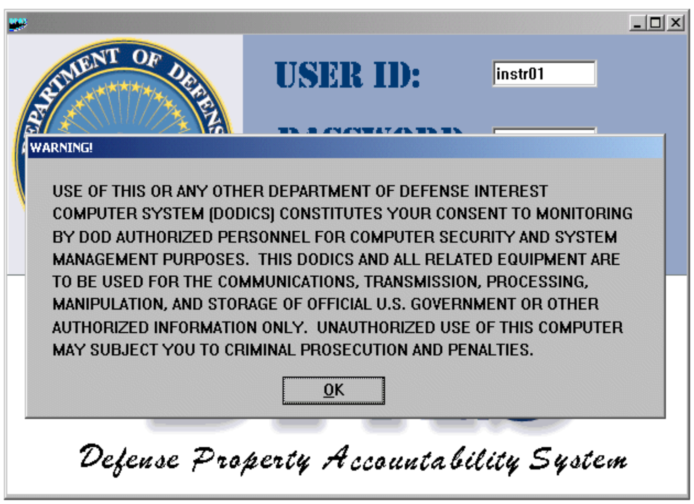
PREREQUISITES

The Property Book Officer (PBO)/Responsible Property Manager must submit a copy of the DD Form 2875 (Security Access Account Request (SAAR)) for each user of DPAS. The form must be submitted to:

- For Navy users, submit to the Navy-DPAS Support Team, Norfolk, VA.
- For Marine Corps users, submit to the Marine Corps Help Desk, Washington, DC.
- For all other users, submit to DECC-O, Ogden, UT.

You will need a **USER ID**, **PASSWORD**, and a **SITE ID** to access DPAS.

STEPS TO PERFORM ACTION

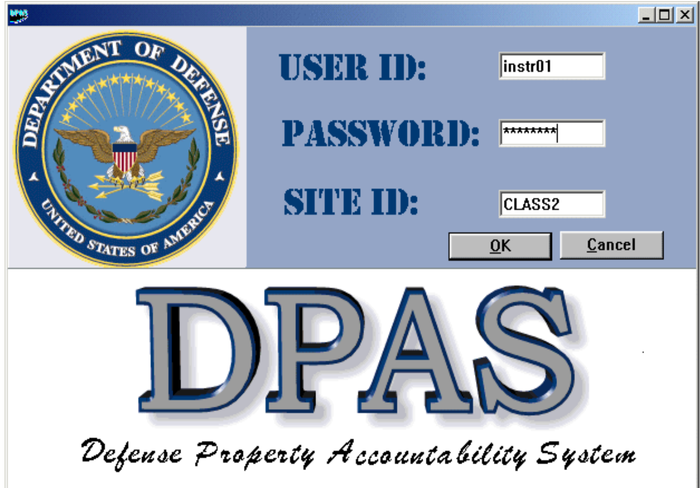


STEP 1:

a. Double-click your DPAS icon on your desktop.
b. Click **OK** or press **Enter** on your key-board.

STEP 2:

a. **USER ID:** Enter your assigned DPAS login id.
b. **PASSWORD:** Enter the *temporary* password that was assigned to you.
c. **SITE ID:** Enter the name of your database (for example, AT-JACK1, NC-CNET, DF-COL, etc.)
d. Click **OK** or press **Enter** on your keyboard.



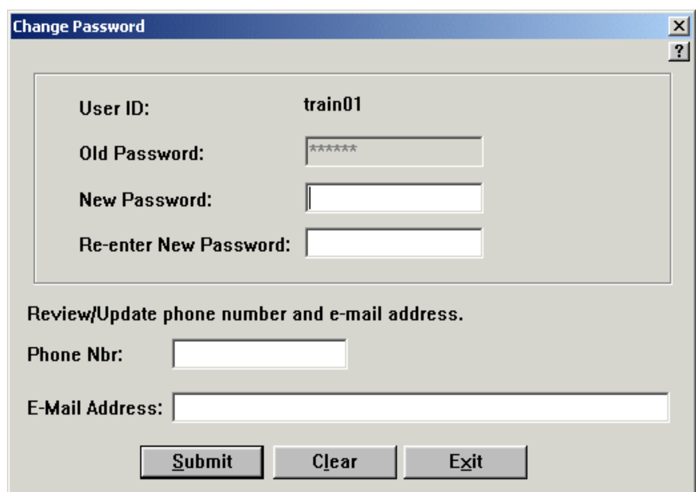
NOTE:
Remember that your user-id and password are unique to you and must be kept confidential.

STEP 3:

- Click **OK**.

STEP 4:

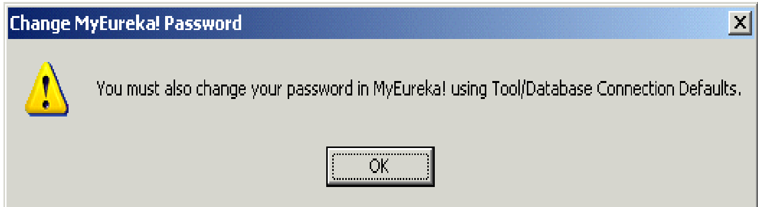
a. **New Password:** Enter your new password (see Password Restrictions).
b. **Re-enter New Password:** Re-enter your new password.
c. **Phone Nbr:** Enter your phone number if not displayed (or change if number is incorrect).
d. **E-Mail Address:** Enter your e-mail address if not displayed (or change if address is incorrect).
e. Click **Submit**.



The Transaction Processed dialog box is displayed.

f. Click **OK**.

The following dialog box is displayed:



g. Click **OK**.

PASSWORD RESTRICTIONS:

- The new password must have a minimum of 8 and a maximum of 12 alphanumeric characters.
- Must contain two of the following three: a Capital letter, a Numeric, or Special Character such as: @, #, $, or an underscore.
- The first position **CANNOT** be an underscore.
- Cannot be any part of the user's name, telephone number, or user ID (the password cannot "sound like" a person's name)
- Cannot contain consecutively repeating characters (i.e., "carrol" is incorrect since it has consecutive small "r"s).
- Must be unique as compared to the last ten password assignments.
- Must be changed every 90 days.
- Cannot be changed more than one time in a five-day period.

NOTE:
Passwords are **CASE SENSITIVE**, therefore, a user can include a capital letter (example: Diet_7up).

Changing Your Password

INTRODUCTION

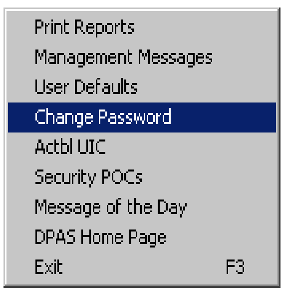
This process will show you the procedures used to change your password in DPAS.

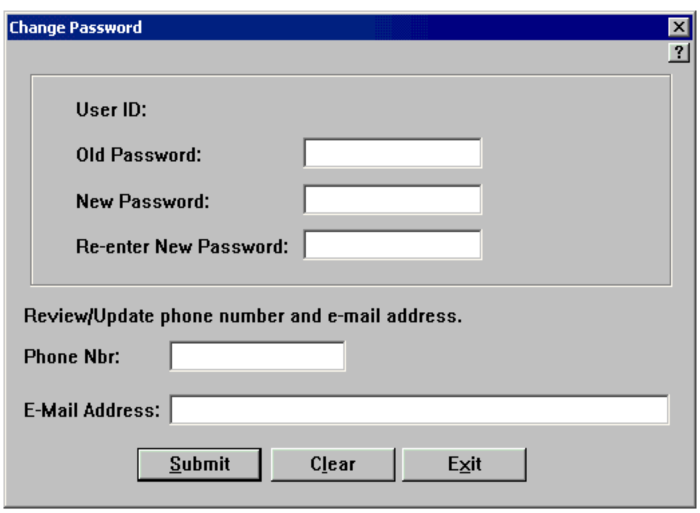
PREREQUISITES

None

STEPS TO PERFORM ACTION

1. Select **File** from the menu bar.
2. Select **Change Password**.





STEP:

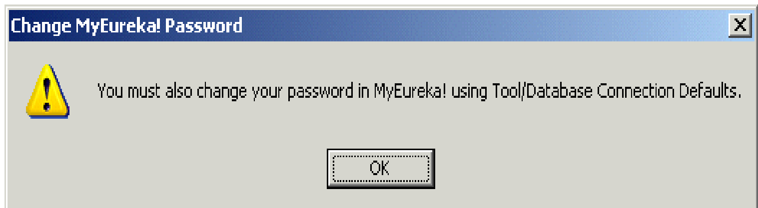
a. **Old Password:** Enter your *old* DPAS password.
b. **New Password:** Enter your new password (see **Logging Into DPAS For The First Time** for password restrictions).
c. **Re-enter New Password:** Re-enter your new password.
d. **Phone Nbr:** Enter your phone number if not displayed (or change if number is incorrect).
e. **E-Mail Address:** Enter your e-mail address if not displayed (or change if address is incorrect).

f. Click **Submit**.

The Transaction Processed dialog box is displayed.

g. Click **OK**.

The following dialog box is displayed:



h. Click **OK**.

Refer to **Changing Your *Eureka* Password** for steps to change your password in the *Eureka* tool.

Changing Your *Eureka* Password

INTRODUCTION

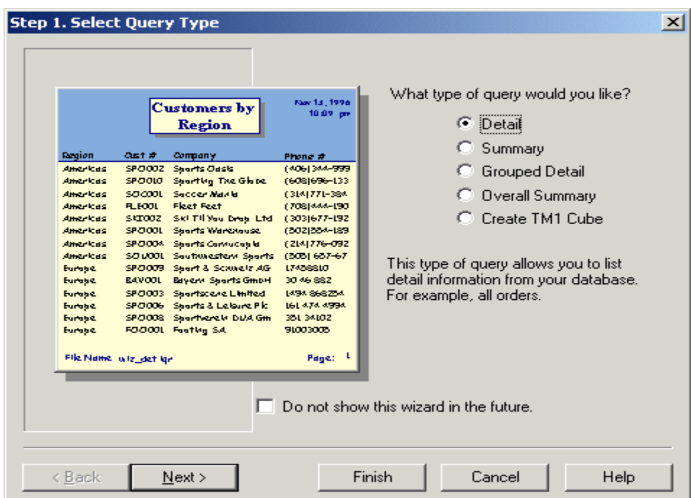
This process will show you the procedures used to change your password in *Eureka!* You will also need to use this process when you change your DPAS password.

PREREQUISITES

None

STEPS TO PERFORM ACTION

1. Select **Ad Hoc Reports** icon or select **Ad Hoc** from the menu bar.
2. Select **Eureka** from the program group.

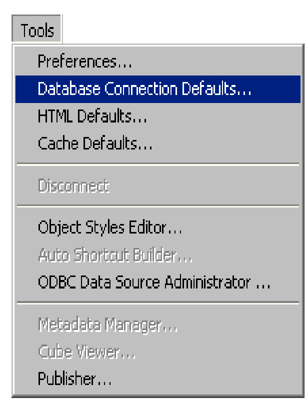


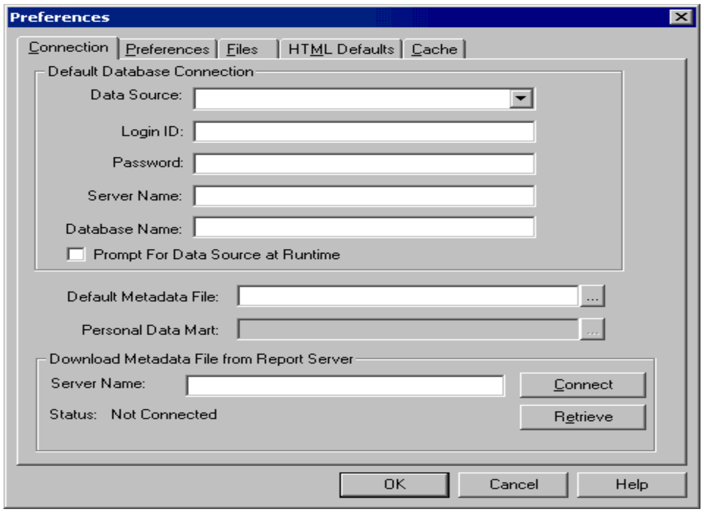
STEP 1:

- If you get this wizard screen, click **Finish**; otherwise, proceed to the next step.

STEP 2:

a. From the menu bar, select **Tools**.
b. Select **Database Connection Defaults** from the program group.





STEP 3:

a. **Data Source:** Make sure that your DPAS database name (SITE ID) is displayed.
b. **Login ID:** Make sure that your DPAS user ID is displayed.
c. **Password:** Enter your ***NEW*** DPAS password.
d. **Server Name:** Leave this field blank.
e. **Database Name:** Leave this field blank.
f. **Prompt For Data Source at Runtime:** Do not check this box. If checked, you will be prompted to enter your DPAS Site ID each time you run a report.
g. **Default Metadata File:** Browse for where the DPAS programs reside on you workstation. If all the defaults were taken during installation, then the path is normally: **C:\Program Files\DOD\DPAS\DPAS.iqk**.

If you are unable to locate the DPAS.iqk file, click on the **START** button, select **Find** (or **Search** if using Windows ME or 2000), **Files or Folders...**, enter **dpas.iqk** look in the Local Hard Drives.

h. **Server Name:** Leave this field blank.
i. **Host Name:** Leave this field blank.
j. Click **OK**.
k. Exit to the DPAS Main Menu.

Navigating DPAS

DPAS Users who are familiar with other Windows based systems should have no trouble navigating DPAS.

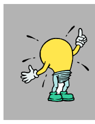
This section will help to familiarize you with the general layout of DPAS, and explain the various methods of accessing the many process screens contained in the system.

The DPAS Main Menu displays icons for each of the main process areas, or modules, in DPAS.

These areas are:

Document Register
Authorizations
Catalog
Accounting
Hand Receipt
Hand Receipt Holder
Maintenance and Utilization
Inquiries
Ad Hoc Reports
Utilities
Security

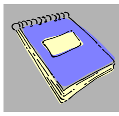
There is also an icon that allows you to exit the system .



HINT!
It is **STRONGLY** recommended that you do not exit DPAS using the **X** in the menu bar.

To access any system module, simply use your mouse to click on the corresponding icon.

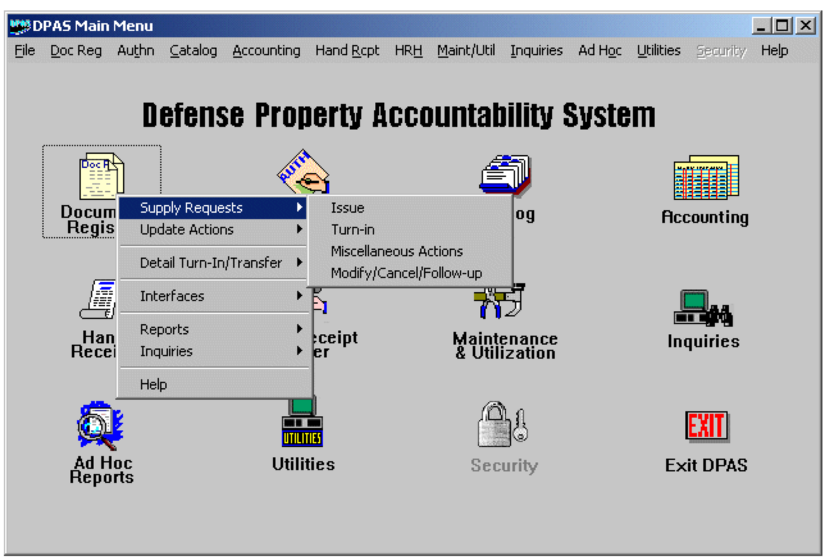
At the top of the Main Menu screen, a menu bar is displayed. This menu bar can also be used to access the DPAS modules. To use the menu bar, you can click on the module name in the menu bar with the mouse, OR, press and hold the **Alt** key, while pressing the letter key that corresponds to the underlined letter in the module name.



NOTE:
In Windows 2000/Professional, the underlines may not display until you depress the **Alt** key.

For example, to access the Hand Receipt Module, you would press and hold the **Alt** key, and press the **R** key at the same time.

Accessing any module will display a menu of processes available in the chosen module, as displayed below:

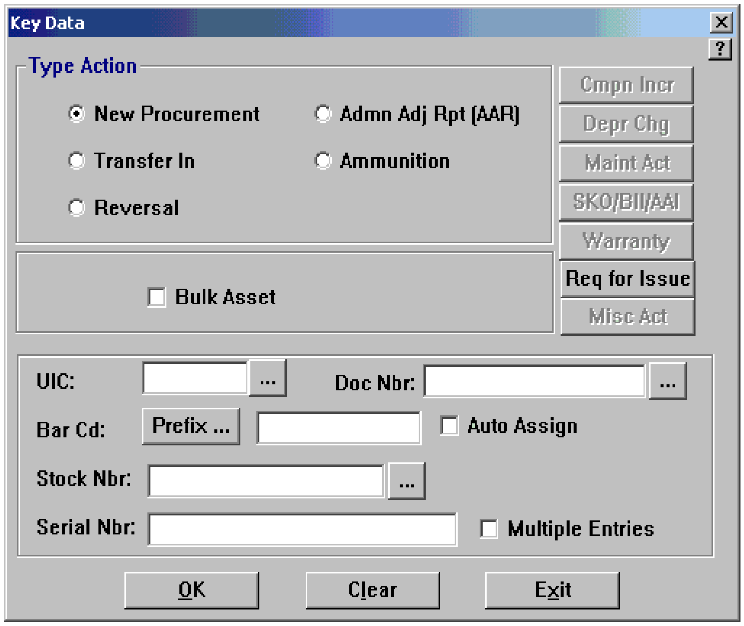


Some processes in each module will also produce sub-menus as shown in the illustration above.

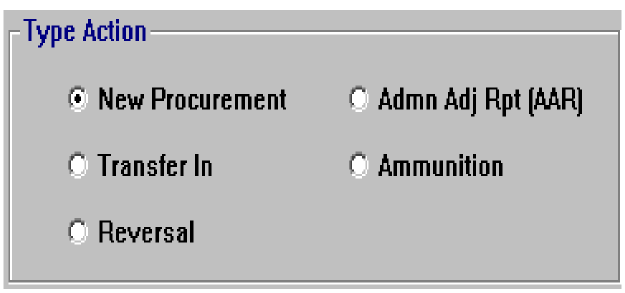
To access a particular process, simply click on the process name with the mouse.

When any specific process is first accessed, DPAS will display a KEY DATA screen. This screen is used to enter information DPAS needs to complete the process.

In the example below, the End Item Increase Key Data screen is displayed:



This screen also contains examples of the various types of input fields used in DPAS:



RADIO BUTTON:

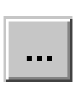
To select, click once with the mouse in the circle next to the desired action.

CHECK BOX

To activate a check box, click once with the mouse in the corresponding square. Click a second time to de-select (or deactivate) the process you just checked.

DATA ENTRY FIELD:

To navigate between data entry fields, use the **TAB** key or left-click the mouse with the cursor/pointer in the field.



BROWSE BUTTONS:
For certain fields, clicking on the browse button next to the data entry field will prompt DPAS to display a list of all possible entry items for that field. For example, clicking the browse button next to a UIC field will display a list of all UICs for which the user has permissions.

FUNCTION BUTTONS:

Functions buttons are used in DPAS to perform specific actions with the data entered in a screen.

Some of the common function buttons in DPAS and their functions are:

OK: Tells DPAS you are done entering Key Data information.

Clear: Clears all information from a specific screen.

Cancel: Cancels a specific process and returns you back a screen.

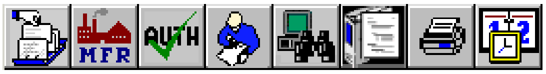
Exit: Cancels the entire process and returns you to the DPAS Main Menu.

There are many other functions buttons used in DPAS. You will see more of them as you complete the DPAS Training course.

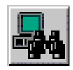
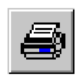
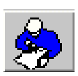
Tool Bar Buttons

In many DPAS process screens, you will see TOOL BAR buttons at the top of the screen. These buttons allow you to access other DPAS processes WITHOUT leaving the process you are working in.

Pictured below are the tool bar buttons from the End Item Increase screen:



The last four buttons that are displayed on this toolbar are standard on every DPAS screen. Other buttons will appear depending on the process you are using at the time.

	Allows you to access the DPAS Catalog module.		Allows you to access the DPAS Inquiry functions.
	Allows you to access the DPAS Catalog Manufacturer Key process.		Allows you to access the DPAS Report Generation screens.
	Allows you access to the DPAS Authorization module/Approved Authorization process.		Allows you to print a report.
	Allows you to access the DPAS Hand Receipt Holder Add/Change/Delete process.		Allows you to add a date/time stamp.

NOTE:
Not all functions will be available to all users, due to differences in DPAS User Security levels.

DPAS Online Help Screens

There are four different ways to obtain on-line assistance while using DPAS:

- Help from the Main Menu
- Help in each DPAS module
- ? on each screen in DPAS
- Right-click in a data element field

Below are examples and exercises to help familiarize you with the on-line help.

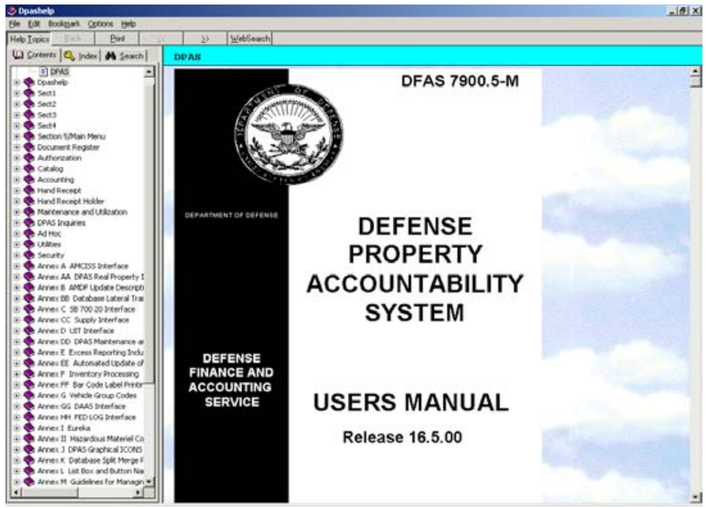
Main Menu Help

- Click on Help from the menu bar. This will list three options:
- **DPAS** – The main help screen
- **What's New** – The latest information about the release
- **About DPAS** – The User ID and Site Id, and the current release you are using. This is helpful if you need to contact the Help Desk for assistance.

DPAS Help Menu

a. Click on **Help** from the Main Menu and select **DPAS**.

This is the main Help screen from DPAS.

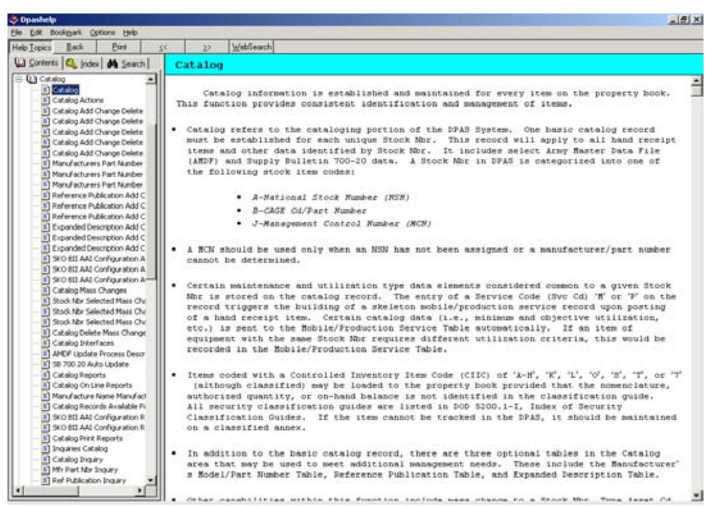


- ➢ The right side window is the text viewing side. Your selection answers will appear here.
- ➢ The left side window is the topic selection listing. The three tabs will allow you to select the type of Help method desired.

The icon tabs indicate their Help functions:

b. The default is the **Contents** tab.
c. **Double-click** on the "purple book" for Catalog. This will open the topics that are related to the Catalog Module.
d. Click on the Catalog topic.

The following screen will appear:



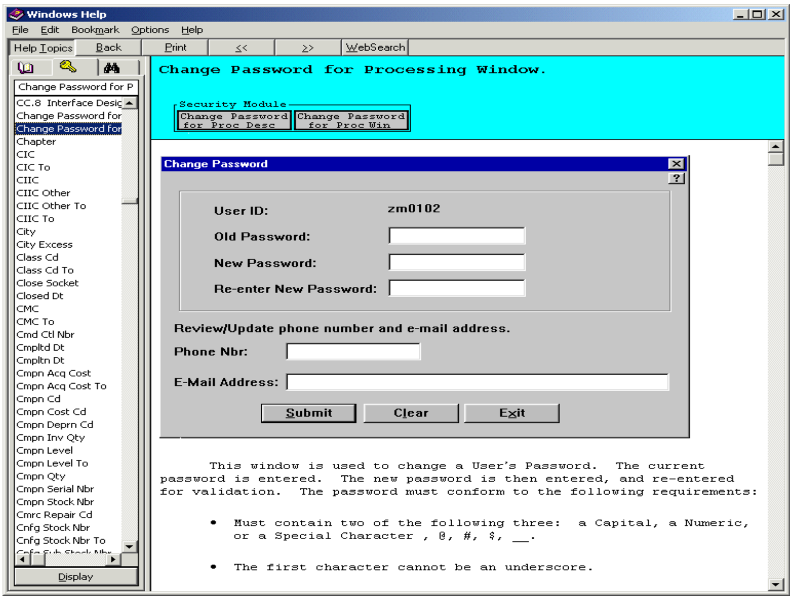
The right side of the screen will display information relating to the topic that was selected.

e. Scroll down on the right side of the screen, there will be a paragraph titled **Catalog Pull Down Menu**.
f. Click on one of the choices and it will list the processes involved to complete the transaction.

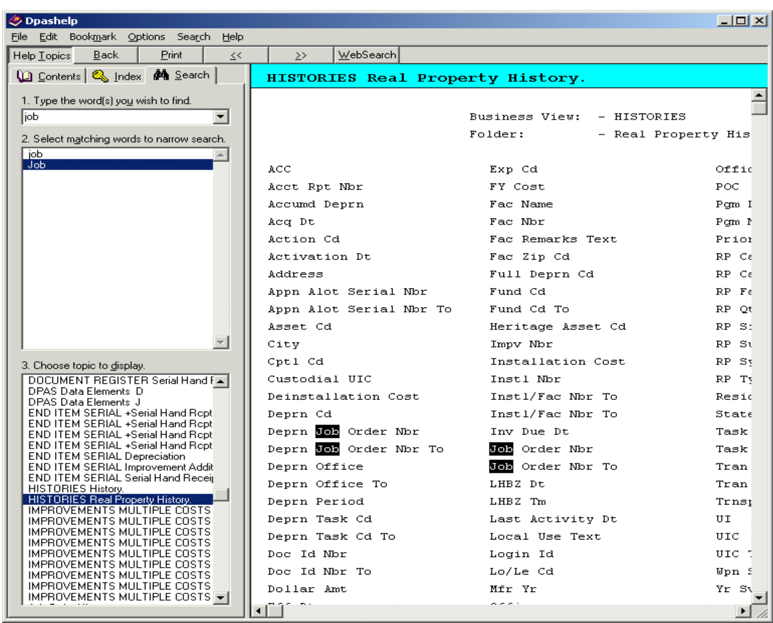
The **Index** tab on the left side of the window will display the help index; sorted alphanumerically, starting with numbers. As you start typing your search topic, the index menu will automatically jump to the first character in your search topic.

g. Click on the **Index** tab.
h. Type in **CHANGE.** Notice as you start typing, the menu will jump to the first letter and continue with the remaining letters.
i. Click **Change Password for Processing Window**.

The following screen will appear:



The **Search** tab opens three windows on the left side. The first window, which is the **Search Topic**. The second window displays variations of the search topic, and third window shows the locations within the DPAS Help. The very first time you select the Search tab, it will create a word list using a wizard. This is a one-time process.

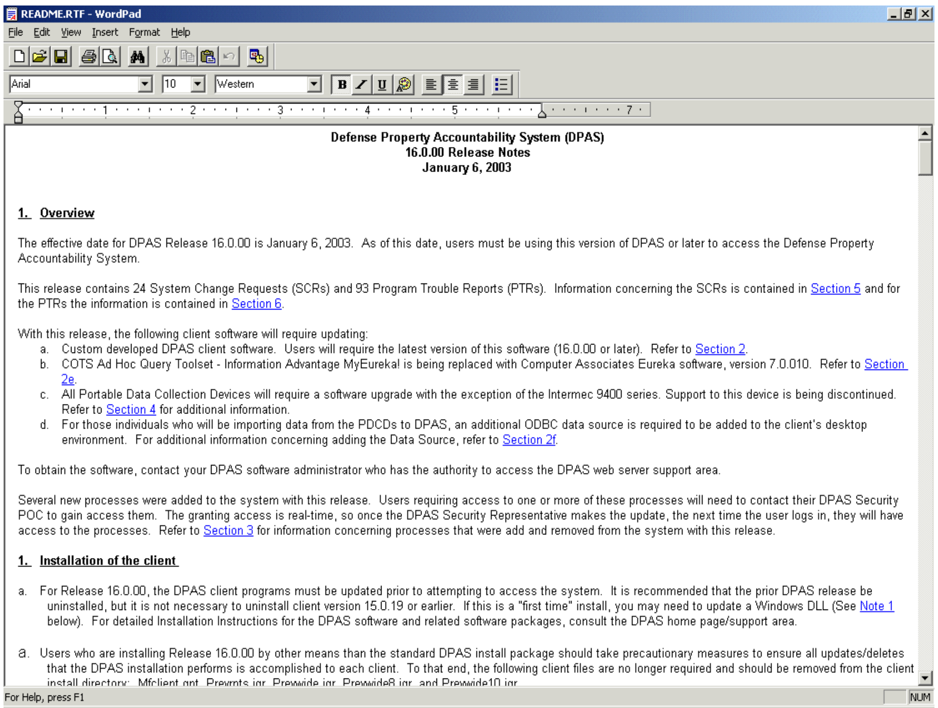


j. In window 1, type **Job.** Notice that you have two selections(**job** and **Job**) in window 2.
k. Highlight **Job.** Notice that in window 3, there are several topics to select.
l. Scroll down the list of topics and highlight **HISTORIES Real Property History.** Notice on the right side of the screen that for the topic you selected, each occurrence of the word **Job** is highlighted.

<u>What's New</u>

What's New will give you the information from the most current release. This contains the 1) System Change Requests (SCRs), 2) Program Trouble Reports (PTRs), 3) System Requirements and 4) Whom to Contact for the Release.

a. Click on the **What's New** option.



Defense Property Accountability System (DPAS)
16.0.00 Release Notes
January 6, 2003

1. Overview

The effective date for DPAS Release 16.0.00 is January 6, 2003. As of this date, users must be using this version of DPAS or later to access the Defense Property Accountability System.

This release contains 24 System Change Requests (SCRs) and 93 Program Trouble Reports (PTRs). Information concerning the SCRs is contained in Section 5 and for the PTRs the information is contained in Section 6.

With this release, the following client software will require updating:

a. Custom developed DPAS client software. Users will require the latest version of this software (16.0.00 or later). Refer to Section 2.
b. COTS Ad Hoc Query Toolset - Information Advantage MyEureka! is being replaced with Computer Associates Eureka software, version 7.0.010. Refer to Section 2e.
c. All Portable Data Collection Devices will require a software upgrade with the exception of the Intermec 9400 series. Support to this device is being discontinued. Refer to Section 4 for additional information.
d. For those individuals who will be importing data from the PDCDs to DPAS, an additional ODBC data source is required to be added to the client's desktop environment. For additional information concerning adding the Data Source, refer to Section 2f.

To obtain the software, contact your DPAS software administrator who has the authority to access the DPAS web server support area.

Several new processes were added to the system with this release. Users requiring access to one or more of these processes will need to contact their DPAS Security POC to gain access them. The granting access is real-time, so once the DPAS Security Representative makes the update, the next time the user logs in, they will have access to the processes. Refer to Section 3 for information concerning processes that were add and removed from the system with this release.

1. Installation of the client

a. For Release 16.0.00, the DPAS client programs must be updated prior to attempting to access the system. It is recommended that the prior DPAS release be uninstalled, but it is not necessary to uninstall client version 15.0.19 or earlier. If this is a "first time" install, you may need to update a Windows DLL (See Note 1 below). For detailed Installation Instructions for the DPAS software and related software packages, consult the DPAS home page/support area.

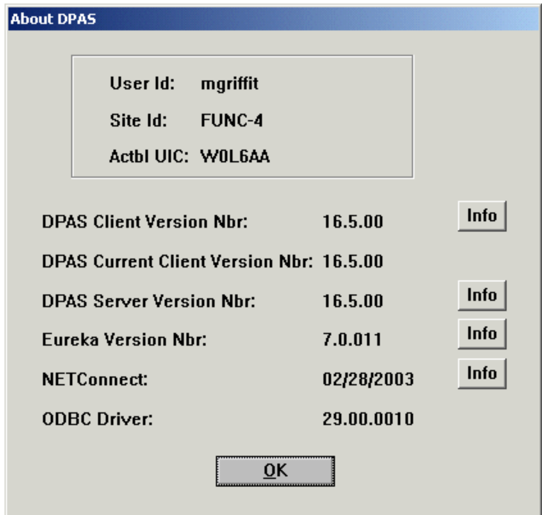
a. Users who are installing Release 16.0.00 by other means than the standard DPAS install package should take precautionary measures to ensure all updates/deletes that the DPAS installation performs is accomplished to each client. To that end, the following client files are no longer required and should be removed from the client install directory: Mfclient.gnt, Prevrnts.igr, Prevwide.igr, Prevwide8.igr, and Prevwide10.igr

b. Close out of the text document and return to the DPAS Main Menu.

About DPAS

About DPAS lists the User Id, Site Id, and the Actbl UIC. This also shows the Version of DPAS that is installed on your system/server.

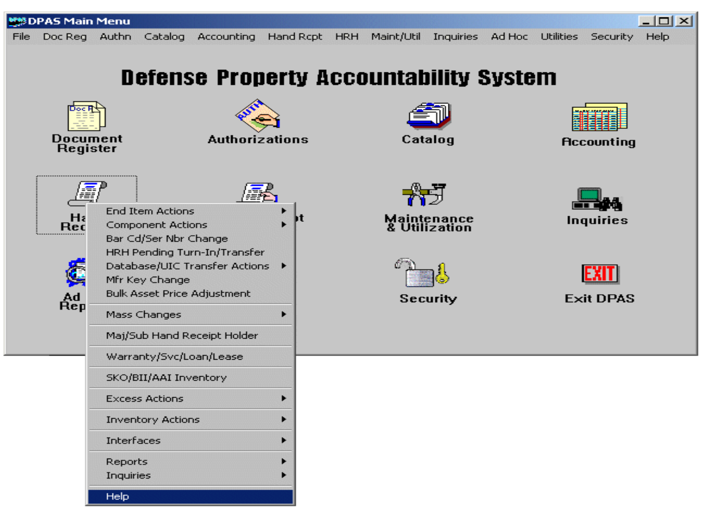
a. Click on **About DPAS**.



b. Click **OK** to return to the DPAS Main Menu.

DPAS Module Help

a. From the DPAS Main Menu, click on **Hand Receipt**.
b. From the drop-down menu, click on **Help**.



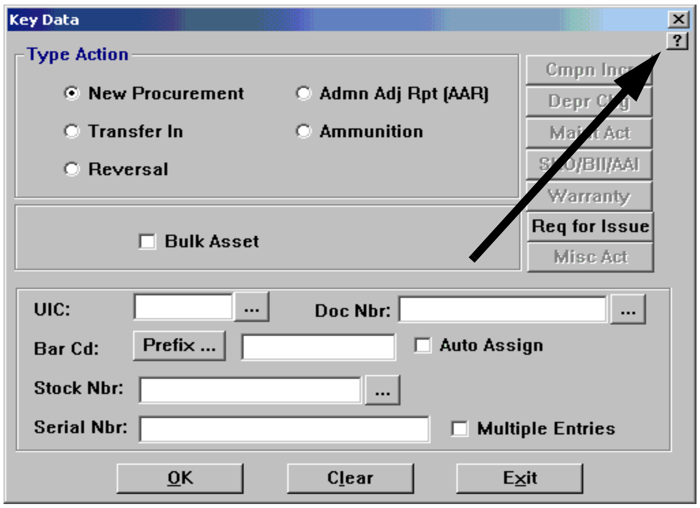
After selecting **Help**, you will see screens similar to those in the other Help sections, but this time beginning specifically in the Hand Receipt.

Process Level Help

Each process window contains access to help, via the **?** located just below the title bar.

a. Select the **Hand Receipt** icon.
b. Select **End Item Actions** from the program group.
c. Select **Increase** from the program list.

The following screen will appear:

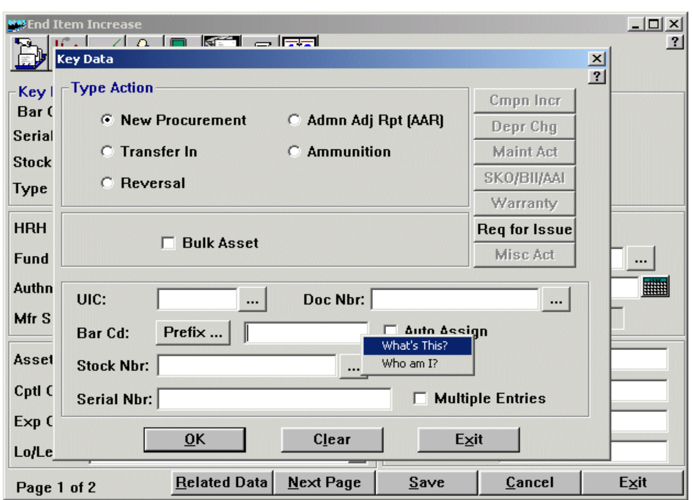


d. Click on the **?** and the Help menu will appear as before. This time it will list the processes necessary to complete the transaction.

Data Element Help

Data Element Help can be accessed by a right-click in the data input field.

a. Select the **Hand Receipt** icon.
b. Select **End Item Actions** from the program group.
c. Select **Increase** from the program list.



d. Right-mouse click in any data element field.
e. Select either **What's This?** or **Who am I?**

- **What's This?** A similar Help screen will be displayed, with the appropriate inquiry already listed. This will give a definition of these selected data field.

- **Who am I?** It displays the **User Id**, **Site Id**, and **Actbl UIC**.

Print Reports

INTRODUCTION

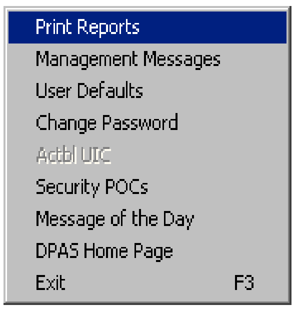
The DPAS Print Reports screen allows you to go directly to the Reports Menu. This menu will display all the reports in the print queue.

PREREQUISITES

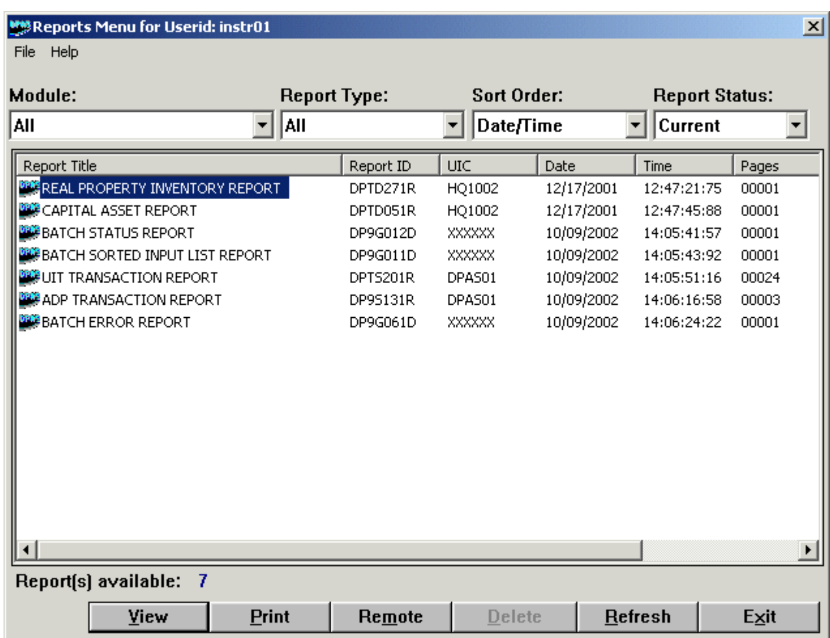
None

STEPS TO PERFORM ACTION

1. Select **File** from the menu bar.
2. Select **Print Reports** from the program group.



Your Reports Menu will be displayed. For example:



Displaying Management Messages

INTRODUCTION

This process will allow the user to view management messages created by the processing programs within DPAS. Along with the view process, the delete function of a 'single' or 'all' message/s is available. As a reminder, all management messages older than (30) thirty days are deleted automatically during the batch cycle process. Additionally, a Management Messages Report (DP9D671R) showing messages by UIC/Module is available. The user can select one or more modules for the report.

NOTE:
The module/s the user has access to will be enabled once entering the screen for both the view and report processes.

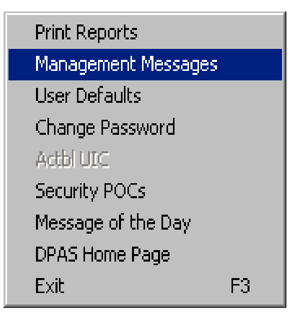
If viewing management messages, you must 'double click' or 'highlight' the message then click the 'Ok' button in order to view the entire management message and additional user message text. Management messages are authored/controlled by DPAS, but the user message text is an option that allows the user to expand or clarify a specific processing action that is performed in other DPAS processes.

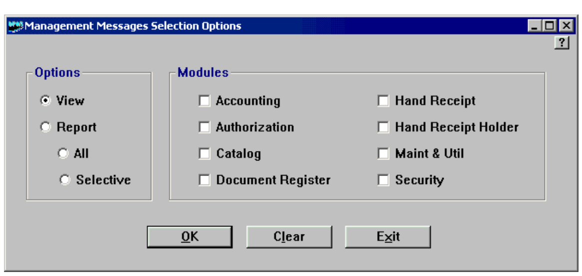
PREREQUISITES

None

STEPS TO PERFORM ACTION

1. Select **File** from the menu bar.
2. Select **Management Messages** from the program group.



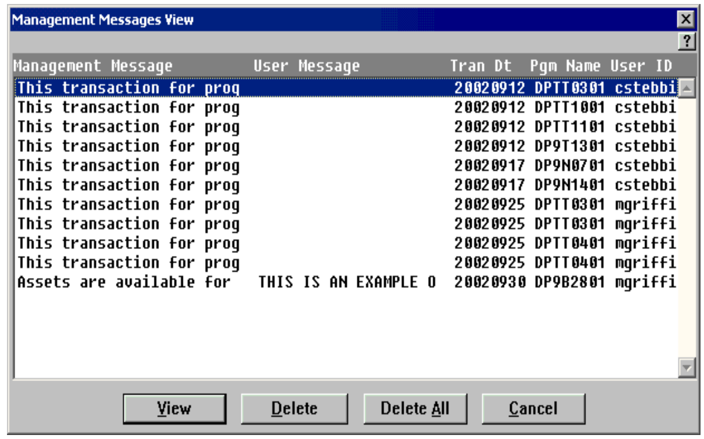


STEP 1:

a. **Options:** Select whether you want to view the message(s) or print a report of all or a specific managment message.
b. **Modules:** Select the module(s) you want to view or report.
c. Click **OK**.

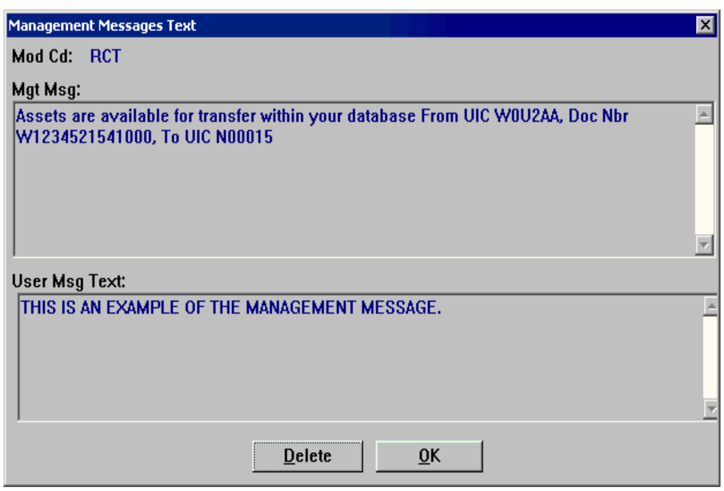
STEP 2:

a. Highlight the message you wish to view.
b. Click **View**.



NOTE:
All management messages older than (30) thirty days are deleted automatically during the batch cycle process.

This is an example of a Management Message:



- Once you have read the message(s), you can either delete it, or click **OK** to return to the previous screen.

Setting User Defaults

INTRODUCTION

The DPAS User Defaults screen allows you to enter and store commonly used information.

This saves time by populating the default settings into the data fields within the DPAS modules. Keep in mind that you have the ability to change the default data in the individual data fields.

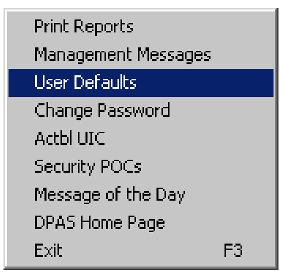
Information stored in the User Defaults screen will be used to populate DPAS data fields in various DPAS processes.

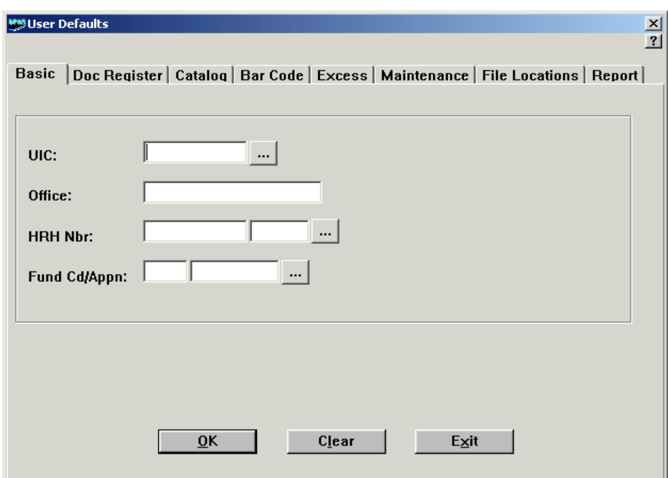
PREREQUISITES

None

STEPS TO PERFORM ACTION

1. Select **File** from the menu bar.
2. Select **User Defaults** from the program group.





STEP 1:

a. Enter any default information that you need. You may need to click on the other tabs to enter more information.

HINT!
Setting up defaults is not a mandatory process within DPAS. But if you want certain fields to always display on your Key Data and/or Process screens, then enter that information on this screen.

The defaults are NOT stored on your database, but on your computer. If you sign on to DPAS using a different computer, then you will need to change the pertinent information.

b. Once all desired default information has been entered, click **OK**.

NOTE:
Information stored as User Defaults will be used to populate all corresponding fields in other DPAS screens.

The information in the User Defaults will only be used when processing a new transaction.

The Transaction Processed dialog box will be displayed.

c. Click **OK**.

You will be returned to the DPAS Main Menu.

Displaying Accountable UICs

INTRODUCTION

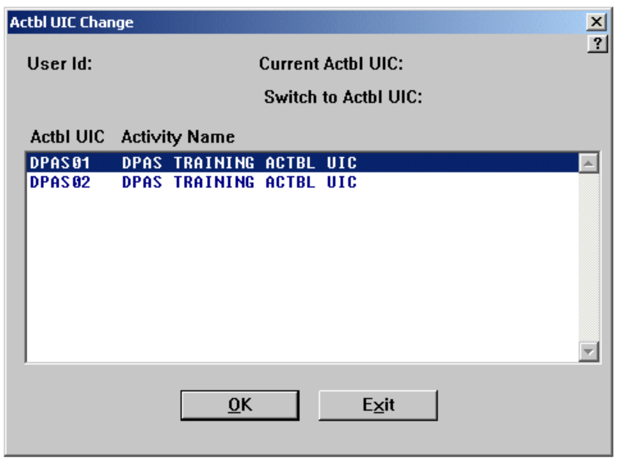
This process will allow you the capability to select a different Accountable UIC (the Accountable UICs are set up by the System Administrator at DECC-Dayton, at the direction of your Command/Major Claimant). A selection box will be provided to allow you to select another Accountable UIC from this window. This process can be selected under **File** while still logged into DPAS. This process window will also be displayed after login for those users who have access to multiple Accountable UICs.

PREREQUISITES

None

STEPS TO PERFORM ACTION

1. Select **File** from the menu bar.
2. Select **Actbl UIC** from the program group.



STEP:

The list of Accountable UICs that are assigned to a user are displayed in the window.

a. Select the Accountable UIC you want to use.
b. Click **OK**.

Displaying Security POCs

INTRODUCTION

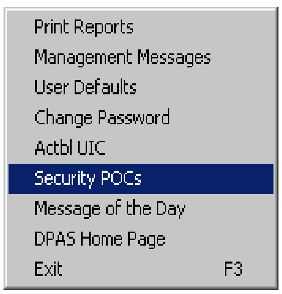
If you need to know who the security POCs are for your database, you can display them in DPAS. The DPAS Systems Administrator establishes these POCs when he adds them to the database.

PREREQUISITES

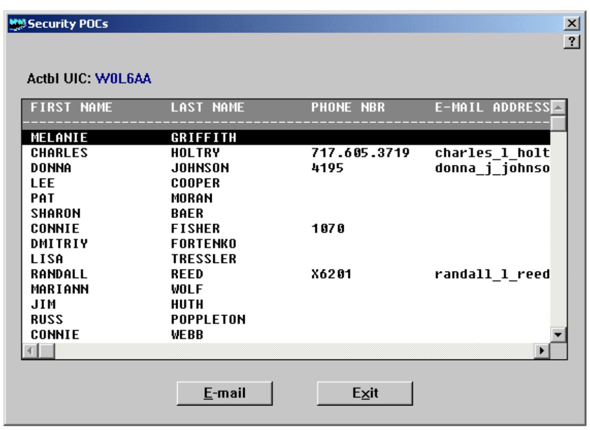
None

STEPS TO PERFORM ACTION

1. Select **File** from the menu bar.
2. Select **Security POCs** from the program group.



A screen ***similar*** to the following is returned:



a. Scroll over to the right to display the level of security each person has.
b. If you need security assistance, select the security POC and click **E-mail**.

Displaying The Message Of The Day

INTRODUCTION

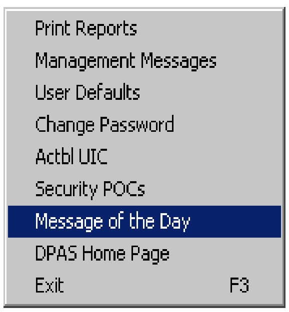
When you first log onto DPAS, the "Message of the Day" is displayed. All too often, users will click the **OK** button without reading the messages. This process will show you how to redisplay the "Message of the Day".

PREREQUISITES

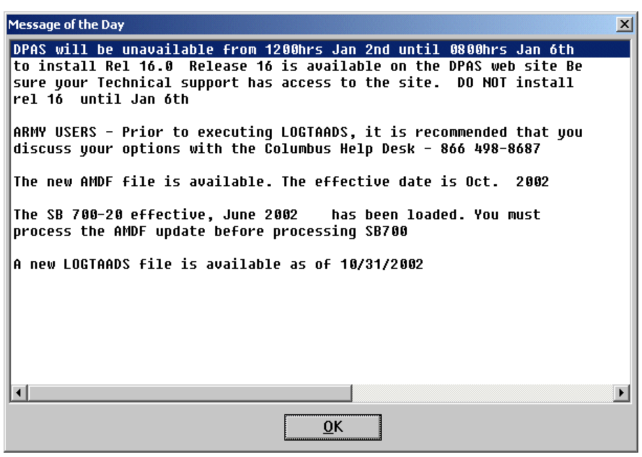
None

STEPS TO PERFORM ACTION

1. Select **File** from the menu bar.
2. Select **Message of the Day** from the program group.



A screen ***similar*** to the following is displayed:



a. You are encouraged to read the message of the day periodically. These messages may include important information.
b. When you are done reading the messages, click **OK**.

Displaying The DPAS Home Page

INTRODUCTION

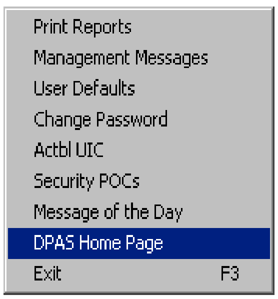
This process will show you how to display the DPAS Home Page while logged onto DPAS.

PREREQUISITES

None

STEPS TO PERFORM ACTION

1. Select **File** from the menu bar.
2. Select **DPAS Home Page** from the program group.



The following is displayed:

Keep in mind that this is just a sampling of the DPAS Home Page and is updated often. If you want to go to the DPAS Home Page outside of DPAS, the address is: **https://www.dpas.dod.mil**.

Practical Exercise: Help #1

Title: Help #1

Objectives: At the completion of this case study the student should demonstrate a capacity to perform the necessary actions to query the DPAS online help.

Prerequisites:

References: Reference in the manual – Navigating DPAS

Scenario: Your activity is just newly converted to DPAS. You have been told that your office will have total responsibility for accounting for all property both physically and financially. You are a logistician and not very familiar with the financial accounting of property. However, you are willing to learn.

Instructions: Use the on-line help in DPAS to find out all you can about the financial aspects of tracking property.

Given:

Summary:

Class Discussion: Q & A

Practical Exercise: Help #2

Title: Help #2

Objectives: At the completion of this case study the student should demonstrate a capacity to perform the necessary actions to query the DPAS online help.

Prerequisites:

References: Reference in the manual – Navigating DPAS

Scenario: Your commanding officer would like to know how many items on the property book are out on loan or on a lease. You look at the batch reports in DPAS and you see that there is a Warranty/Service/Loan/Lease report that may get the commander what he needs. However, you are not sure and you don't want to generate the report only to find out you can't use the information.

Instructions: Use the on-line help in DPAS, Annex 'Y', to take a sneak peek at the warranty report to see if it will give the commander the information that he needs.

Given:

Summary:

Class Discussion: Q & A

Hand Receipt Holder Functions Overview

MODULE: Hand Receipt Holder

There are only a small number of functions available to users within the Hand Receipt Holder Module. It was created in addition to the Hand Receipt (Property Book) portion of the program to provide limited management to equipment within the system. Property Book Officers may elect to grant Responsible Officers/Custodians (personnel financially responsible or have signed for property/equipment) access to this module rather than the Hand Receipt. This would limit those users to only property for which they are responsible versus access to all items in the Property Book. As a result, Responsible Officers/Custodians may not affect Property Book balances, only initiate actions for approval/disapproval by the Property Book Officer. The following procedures are available in the Hand Receipt Holder Module based on the level of authority granted by Property Book Officer:

Levels of Authorization for Hand Receipt Holders

First Level Authority

- Create Sub Hand Receipt Holder within Major Hand Receipt
- Assign Property to Sub Hand Receipt Holder
- Change location of assigned property
- Inventory Management
- Reports – Printing Hand Receipt Report
- Inquiry

Second Level Authority **New Authority

- Create Sub Hand Receipt Holder within Major Hand Receipt
- Assign Property to Sub Hand Receipt Holder
- Change location of assigned property
- Inventory Management
- Reports
- Inquiry

**Request Turn in property to PBO

**Request Transfer out of property to PBO

Third Level of Authority **New Authority

- Create Sub Hand Receipt Holder within Major Hand Receipt
- Assign Property to Sub Hand Receipt Holder
- Change location of assigned property
- Request Turn in of property
- Request Transfer out of property
- Inventory Management
- Reports
- Inquiry

**Transfer In without PBO approval

PREREQUISITES

Responsible Officers/Custodians must be granted access to the UIC and Major Hand Receipt Holder in the DPAS Security Module.

A ***Major*** Hand Receipt Holder must be established prior to the creation of a ***Sub*** Hand Receipt Holder.

HRH Transfer Authority - Property Book Officer granting appropriate authorization level to perform Turn-in/Transfer requests and/or Transfer In (see **Adding a Major or Sub Hand Receipt Holder**).

Creating A Sub Hand Receipt Holder

MODULE: Hand Receipt Holder

INTRODUCTION

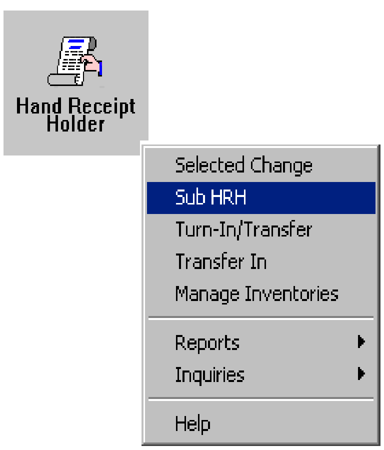
The Hand Receipt Holder Number (HRH) is a locally assigned number used to identify an individual responsible for assets. The first six positions (1st box) identify the Major (or primary) HRH. The last three (2nd box) are used to distinguish a Sub (secondary) HRH. For example, a Property Book Officer/Custodian may want to assign responsibility of an asset to a Sub by adding additional digits in the second box to the major. The PBO' s HRH Number (major) could be 1402. The Sub HRH (secondary) could be 1402 01. The next Sub HRH Holder could be established as 1402 02, and so on. Major HRH Holders must be established *first* in order to create a Sub Hand Receipt Holder, and security access for UIC/HRH Holder must be granted prior to this transaction.

PREREQUISITES

You must have Security access to the Major HRH number for which you are creating the sub-HRH

STEPS TO PERFORM ACTION

1. Select the **Hand Receipt Holder** icon, or select **HRH** from the menu bar.
2. Select **Sub HRH** from the program group.



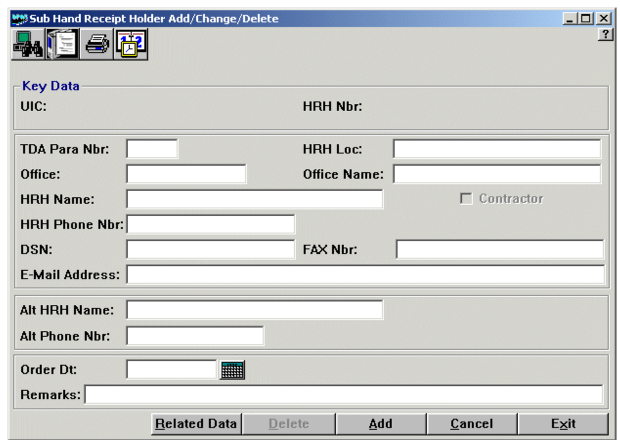
STEP 1:

a. **UIC:** Enter or browse for the UIC.
b. **Major HRH Nbr (1st box):** Enter or browse for your major hand receipt holder number.
c. **Sub HRH Nbr (2nd box):** Enter the **NEW** sub hand receipt holder number.

NOTES:
Add 1 to 3 alphanumeric characters in the second box to create a ***New*** sub hand receipt holder.

To **Change** Sub Hand Receipt Holder Information or to **Delete** a Sub HRH from the system, type in the entire existing number. If a Sub HRH is being deleted, all assets assigned to the Sub must first be transferred or turned in prior to a deletion. DPAS will not allow individuals to be removed from the system with items still assigned to them.

STEP 2:



a. **TDA Para Nbr:** Enter the TDA Paragraph Number, if applicable.
b. **HRH Loc:** Enter the location of the sub hand receipt holder.
c. **Office:** Enter the office of the sub hand receipt holder.
d. **Office Name:** Enter the office name of the sub hand receipt holder.
e. **HRH Name:** Enter the name of the sub hand receipt holder.
f. **Contractor:** If the major hand receipt holder is a Contractor, this box will display checked. This field is not accessible to the hand receipt holder.
g. **HRH Phone Nbr:** Enter the phone number of the sub hand receipt holder.
h. **DSN:** Enter the DSN phone number of the sub hand receipt holder, if available.
i. **FAX Nbr:** Enter the FAX phone number of the sub hand receipt holder, if available.
j. **E-Mail Address:** Enter the e-mail address of the sub hand receipt holder, if available.
k. **Alt HRH Name:** If there is an alternate sub hand receipt holder, enter that name in this field.
l. **Alt Phone Nbr:** If there is an alternate sub hand receipt holder, enter the phone number in this field.
m. **Order Dt:** Enter the date the sub hand receipt order was effective. You can also click on the calendar button and select the date rather than entering it in the field.
n. **Remarks:** Enter any remarks, if desired.
o. Click **Add**.

The Transaction Processed dialog box will be displayed.

p. Click **OK**.

You will be returned to the Key Data screen.

q. Click **Exit**.

Making Selected Changes

MODULE: Hand Receipt Holder

INTRODUCTION

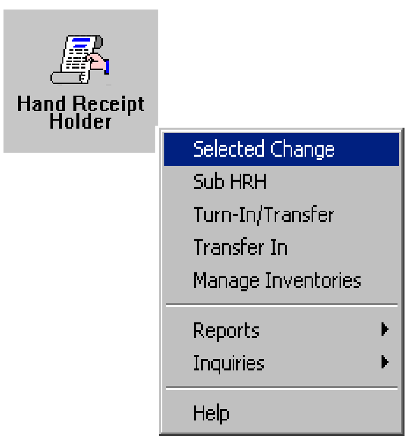
The Selected Changes function of the Hand Receipt Holder Module was created to provide users a quick and easy way to make **two** changes concerning an asset; 1) where the asset is located, and 2) to a Sub Hand Receipt Holder within the Major Hand Receipt Holders account. A local use field is also available for the activities use such as a department or budget office that will be tied to the end item or component. Other changes such as price adjustments, stock number/serial number/bar code changes, as well as adding or removing items from the property book are performed within the Hand Receipt Module (Property Book).

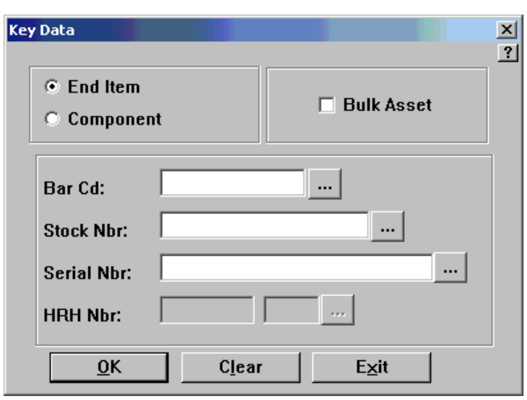
PREREQUISITES

You must have Security access to the Major HRH number for which you are making changes.

STEPS TO PERFORM ACTION

1. Select the **Hand Receipt Holder** icon, or select **HRH** from the menu bar.
2. Select **HRH Actions** from the program group.
3. Select **Selected Change** from the program list.

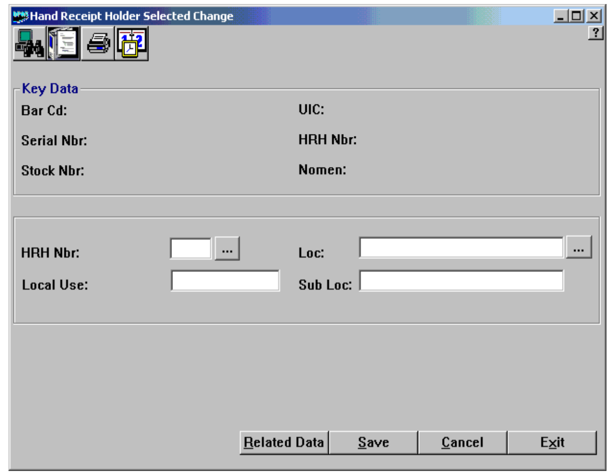




STEP 1: Select type of item

a. Select if the item is an **End Item** or a **Component**.
b. **Bulk Asset:** Check this box if the item is bulk managed.
c. **Bar Cd:** If your Activity uses bar codes, enter the bar code of the item. Proceed to step f.
d. **Stock Nbr:** If your Activity does not use bar codes, enter or browse for the stock number of the item.
e. **Serial Nbr:** If your Activity does not use bar codes, enter or browse for the serial number of the item. This field is not accessible for bulk managed items.
f. **HRH Nbr:** If the item is bulk managed, enter the hand receipt holder.

STEP 2: Identify the item



a. **HRH Nbr:** If you are assigning this asset to the **Sub HRH**, enter or browse for the sub hand receipt holder number.
b. **Loc:** If you are changing the location of the asset, enter or browse for the new location.
c. **Local Use:** If you are changing the local use field, enter your change.
d. **Sub Loc:** If you are changing the sub location of the asset, enter the new sub location.
e. Click **Save**.

The Transaction Processed dialog box will be displayed.

f. Click **OK**.

You will be returned to the Key Data screen.

g. Click **Exit**.

NOTES:
The **Related Data** feature displays the following information about the asset:

ACC Code, Asset Code, Authn Ctl Nbr, ECC Code, Fund Code, Lo/Lease Code, PBIC Code, Qty, and Svc Code.

Requesting Permission To Turn-In An Asset

MODULE: Hand Receipt Holder

INTRODUCTION

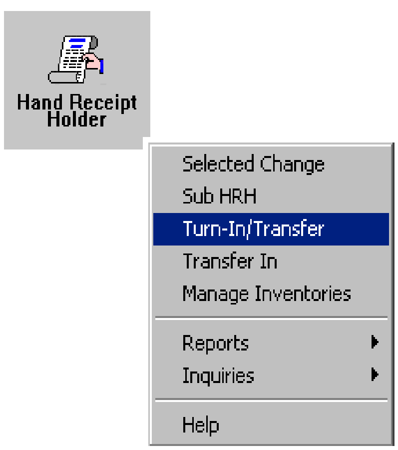
The Turn-In function of the Hand Receipt Holder Module allows a Major/Sub Hand Receipt Holder to request permission to turn-in an end item record (Serial or Bulk). Turn-In actions will have an option to allow for pick-up notification when assets are available for receipt. The Request for Turn-in process also includes the capability to request the turn-in of non-property book items. Non-Property Book items are those the user wishes to track for auditing purposes but not record in their property book. When Non-Property Book items are input, the process may require Manufacturer data and, in some instances, Catalog data to ensure the PBO has sufficient data to process the request.

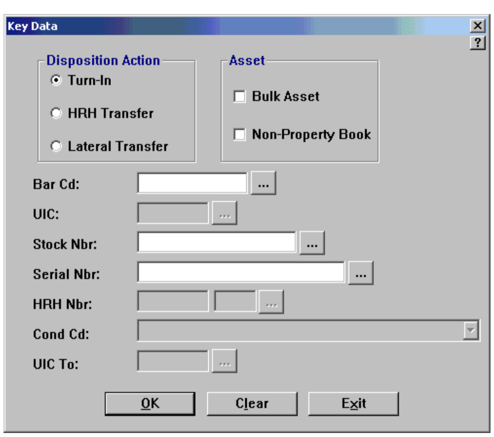
PREREQUISITES

Major HRH number must have Second Level Authority in the security program module

STEPS TO PERFORM ACTION

1. Select the **Hand Receipt Holde**r icon, or select **HRH** from the menu bar.
2. Select **Turn-In/Transfe**r from the program group.





STEP 1:

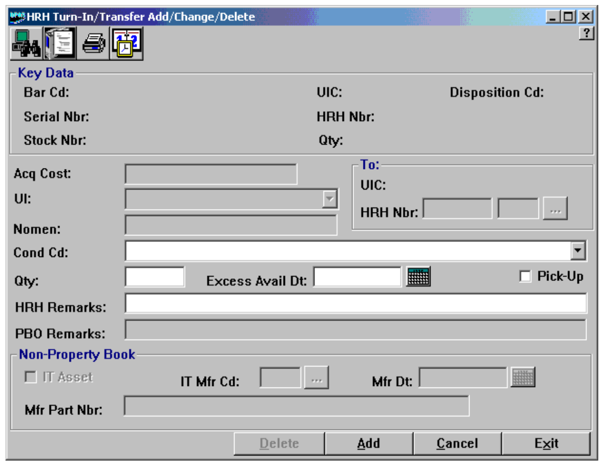
a. **Disposition Action:** Accept the default **Turn-In**.
b. **Asset:** Indicate if the asset is bulk or non-property.
c. **Bar Cd:** If your Activity uses bar codes, enter the bar code of the item. **Proceed to step f.**
d. **Stock Nbr:** If your Activity does not use bar codes, enter or browse for the stock number of the item.
e. **Serial Nbr:** If your Activity does not use bar codes, enter or browse for the serial number of the item. This field is not accessible for bulk managed items.
f. **HRH Nbr:** If the item is bulk managed or non-property, enter the hand receipt holder.

g. **Cond Cd:** If the item bulk managed, select the condition of the asset.

> **HINT!**
> **UIC To** will always be grayed out for a **Turn-In** action.

h. Click **OK**.

STEP 2:



a. **Acq Cost:** For Non-Property items, enter the cost of the item.
b. **UI:** For Non-Property items, select the unit of issue for the item.
c. **Nomen:** For Non-Property items, enter the description of the item.
d. **HRH Nbr To:** This field is only accessible if you are transferring the item to another HRH.
e. **Cond Cd:** Select the appropriate condition of the item.
f. **Qty:** Enter the quantity for bulk managed items.
g. **Excess Avail Dt:** Enter the date the item is available from excess. You can also click on the calendar button to select the appropriate date.
h. **Pick-Up:** Check this box if requesting the item be picked up.
i. **HRH Remarks:** You may enter any remarks in this field for the PBO.
j. **PBO Remarks:** This field will display any PBO Remarks. It is not accessible for the HRH.

Non-Property Book: This group box is only accessible for non-property items and these fields are mandatory.

k. **IT Asset:** If the item is non-property IT, then check this box.
l. **IT Mfr Cd:** If the item is IT **AND** you know the 3-position manufacturer code, then enter it in this field. If you do not know the IT Mfr Cd, click on the browse button to search the IT Mfr Table.
m. **Mfr Dt:** Enter the date the item was manufactured. You can also click on the calendar to select the appropriate date.
n. **Mfr Part Nbr:** Enter the manufacturer's part number or model number.
o. Click **Add**.

The Transaction Processed dialog box will be displayed.

p. Click **OK**.

You will be returned to the Key Data screen.

q. Click **Exit**.

> **NOTE:**
> The request is now available to the Approving Officer in the Pending queue seen in the Hand Receipt.

Transferring An Asset to Another Hand Receipt Holder

MODULE: Hand Receipt Holder

INTRODUCTION

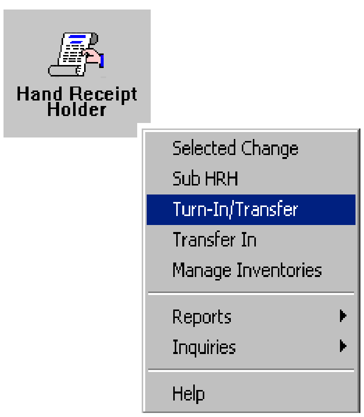
The Transfer/Turn In function of the Hand Receipt Holder Module allows a hand receipt holder to transfer an end item record (Serial or Bulk) to another hand receipt holder within the same UIC. If a serial record has components, those records will also be updated. The process will write transactions to the Detail Turn-In/Transfer Table, for review by the Property Book Officer (PBO) and approval/dis-approval when required.

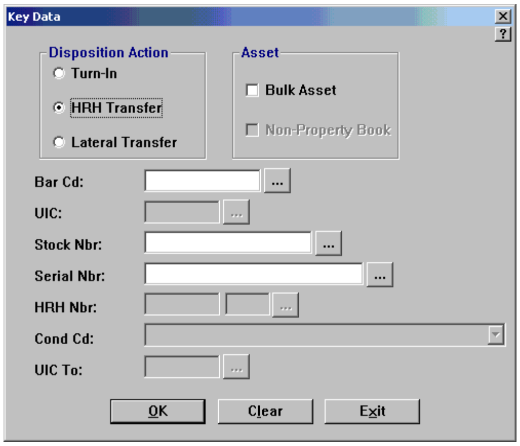
PREREQUISITES

You must have Security access to the Major HRH

STEPS TO PERFORM ACTION

1. Select the **Hand Receipt Holder** icon, or select **HRH** from the menu bar.
2. Select **Turn-In/Transfer** from the program group.

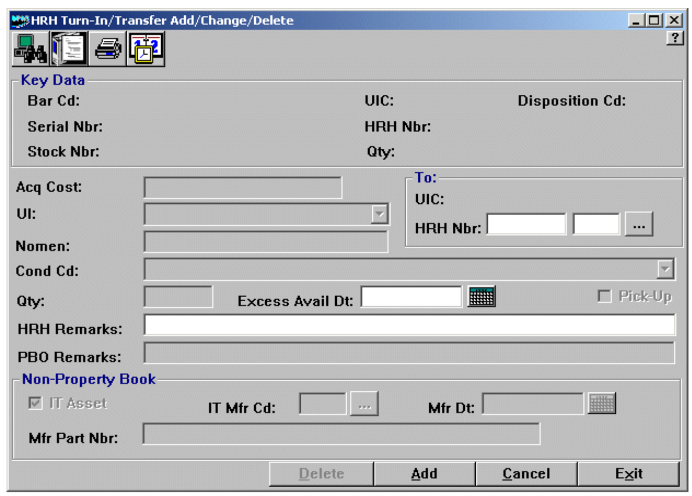




STEP 1:

a. **Disposition Action:** Select **HRH Transfer**.
b. **Asset:** Indicate if the asset is bulk. Non-Property is not accessible for HRH transfers.
c. **Bar Cd:** If your Activity uses bar codes, enter the bar code of the item. **Proceed to step f.**
d. **Stock Nbr:** If your Activity does not use bar codes, enter or browse for the stock number of the item.
e. **Serial Nbr:** If your Activity does not use bar codes, enter or browse for the serial number of the item. This field is not accessible for bulk managed items.
f. **HRH Nbr:** If the item is bulk managed or Non-Property, enter the hand receipt holder.
g. **Cond Cd:** This field is not accessible for HRH transfers.
h. Click **OK**.

STEP 2:



a. **Acq Cost:** This field is displayed and cannot be changed.
b. **UI:** This field is displayed and cannot be changed.
c. **Nomen:** This field is displayed and cannot be changed.
d. **HRH Nbr To:** Enter or browse for the hand receipt holder to which you are transferring the item.
e. **Cond Cd:** This field is not accessible.
f. **Qty:** Enter the quantity for bulk managed items.
g. **Excess Avail Dt:** Enter the date the item is available from excess. You can also click on the calendar button to select the appropriate date.
h. **Pick-Up:** This field is not accessible.
i. **HRH Remarks:** You may enter any remarks in this field for the PBO.
j. **PBO Remarks:** This field will display any PBO Remarks. It is not accessible for the HRH.
k. **Non-Property Book Group Box:** The fields in this group box are not accessible.
l. Click **Add**.

The Transaction Processed dialog box will be displayed.

m. Click **OK**.

You will be returned to the Key Data screen.

n. Click **Exit**.

NOTE:
Once the transaction is processed, the request will be available to the Approving Officer for approval/ disapproval as seen in **Hand Receipt**.

Transferring An Asset To Another UIC On The Same Database (Lateral Transfer)

MODULE: Hand Receipt Holder

INTRODUCTION

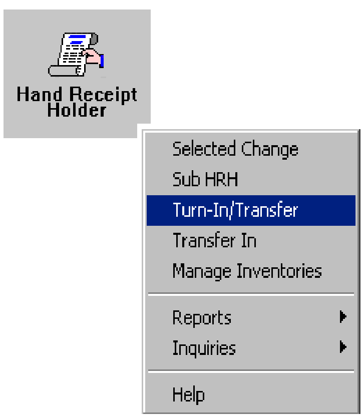
The Lateral Transfer function of the Hand Receipt Holder Module allows a hand receipt holder to request permission to transfer an asset to another UIC within the same data base. If an asset has component assets attached, those records will also be updated. The process will write transactions to the Detail Turn-In/Transfer Table, for review by the Property Book Officer (PBO) and approval/disapproval when required.

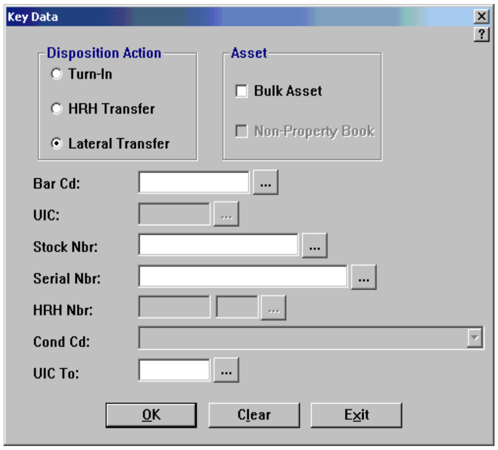
PREREQUISITES

You must have Security access to the Major HRH number

STEPS TO PERFORM ACTION

1. Select the **Hand Receipt Holder** icon, or select **HRH** from the menu bar.
2. Select **Turn-In/Transfer** from the program group.

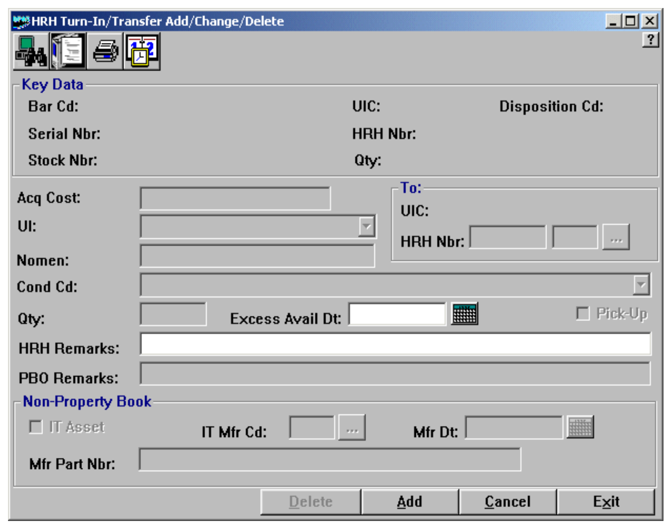




STEP 1:

a. **Disposition Action:** Select **Lateral Transfer**.
b. **Asset:** Indicate if the asset is bulk. Non-property is not accessible for lateral transfers.
c. **Bar Cd:** If your Activity uses bar codes, enter the bar code of the item. Proceed to step f.
d. **Stock Nbr:** If your Activity does not use bar codes, enter or browse for the stock number of the item.
e. **Serial Nbr:** If your Activity does not use bar codes, enter or browse for the serial number of the item. This field is not accessible for bulk managed items.
f. **HRH Nbr:** If the item is bulk managed, enter the hand receipt holder.
g. **Cond Cd:** This field is not accessible for lateral transfers.
h. **UIC To:** Enter or browse for the UIC to which the asset being transferred.
i. Click **OK**.

STEP 2:



a. **Acq Cost:** This field is displayed and cannot be changed.
b. **UI:** This field is displayed and cannot be changed.
c. **Nomen:** This field is displayed and cannot be changed.
d. **HRH Nbr To:** This field is not accessible.
e. **Cond Cd:** This field is not accessible.
f. **Qty:** Enter the quantity for bulk managed items.
g. **Excess Avail Dt:** Enter the date the item is available from excess. You can also click on the calendar button to select the appropriate date.
h. **Pick-Up:** This check box is not accessible.
i. **HRH Remarks:** You may enter any remarks in this field for the PBO.
j. **PBO Remarks:** This field will display any PBO Remarks. It is not accessible for the HRH.
k. **Non-Property Book Group Box:** The fields in this group box are not accessible.
l. Click **Add**.

The Transaction Processed dialog box will be displayed.

m. Click **OK**.

You will be returned to the Key Data screen.

n. Click **Exit**.

NOTE:
Once the transaction is processed, the request will be available to the Approving Officer for approval/ disapproval as seen in **Hand Receipt**.

Transferring-In An Asset

MODULE: Hand Receipt Holder

INTRODUCTION

The Transfer-In function of the Hand Receipt Holder Module provides users the capability to accept an asset transferred from another Hand Receipt Holder. An Options Group Box on the Key Data screen permits the option of entering a specific HRH Number or requesting all HRH Numbers under the user's Accountable UIC. The program will retrieve all corresponding records, and display them in a list box.

In the processing window the user will select a record from the list box. Once chosen, the record's UIC, HRH Number To and Qty fields will be displayed and disabled. The user will then have to enter an Authorization Control Number, Office and Location. Assigning a Document Number is optional. If for some reason the user does not want to receive the transfer, select the Transfer Disapproved radio button and enter the explanation in the HRH Remarks field (HRH Remarks is optional if not disapproved).

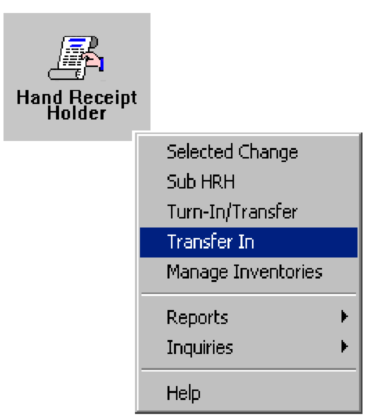
PREREQUISITES

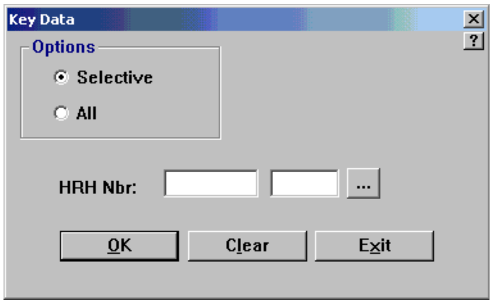
If your Activity uses Authorizations, an authorization record must exist for the asset that you will be transferring in.

You must have Third Level Authority to the Major HRH number

STEPS TO PERFORM ACTION

1. Select the **Hand Receipt Holder** icon, or select **HRH** from the menu bar.
2. Select **Transfer-In** from the program group.

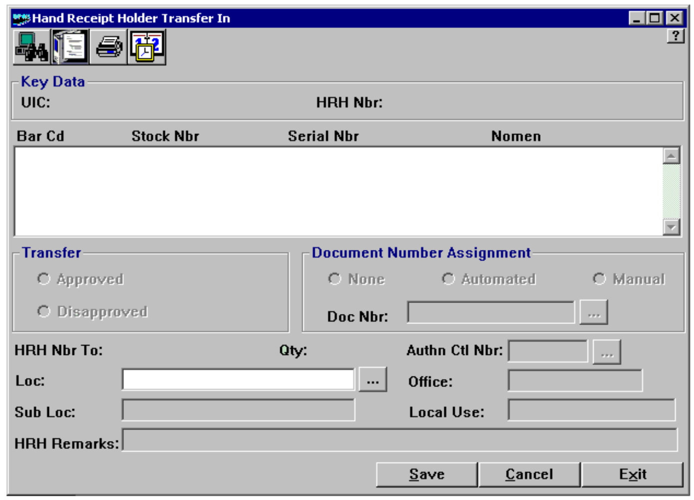




STEP 1:

a. **Options:** Select **Selective** if you wish to retrieve records for a specific HRH Nbr. Select **All** if you wish to retrieve records for every HRH Nbr under user's Actbl UIC.
b. **HRH Nbr:** If your option was **Selective**, enter or browse for the HRH Nbr. If your option was **All**, this field is not accessible.
c. Click **OK**.

STEP 2:



a. In the window, a list of items awaiting transfer will be displayed (record by record). Select the item to be transferred in by double-clicking on it.
b. **Transfer:** Select to approve or disapprove the transfer in.
c. **Document Number Assignment:** Select the appropriate document number assignment. Select **None** if no document number is required for this action, select **Automated** if you wish DPAS to automatically assign your document number, or select **Manual** if you wish to manually enter your document number.
d. **Doc Nbr:** If you selected **Automated**, click the browse button to display a valid document number. If you selected **Manual**, enter a valid 13-position document number. This field will not be accessible if you selected the assignment of **None**.
e. **Authn Ctl Nbr:** If your Activity uses the Authorizations, enter or browse for the appropriate authorization for the asset.
f. **Loc:** Enter or browse for the location of the asset.
g. **Office:** Enter the office to which the asset is assigned.
h. **Sub Loc:** Enter the sub location of the asset, if desired.
i. **Local Use:** Enter a user defined local use comment, if desired.
j. Click **Save**.

Generating A Hand Receipt Report By HRH Nbr

MODULE: Hand Receipt

INTRODUCTION

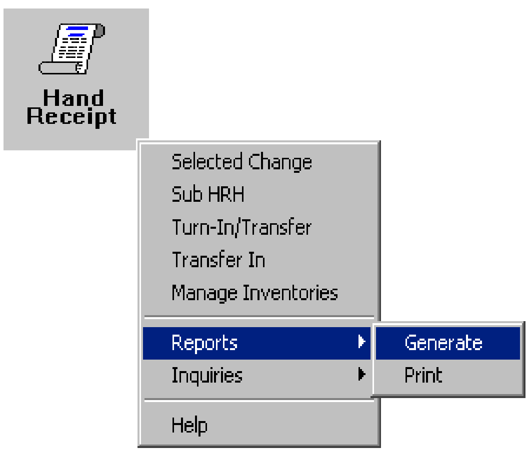
This section will demonstrate how to generate a Hand Receipt report by HRH Nbr.

PREREQUISITES

None

STEPS TO PERFORM ACTION

1. Select the **Hand Receipt** icon, or select **Hand Rcpt** from the menu bar.
2. Select **Inventory Actions** option from the program group.
3. Select **Generate Inventory** from the program list.



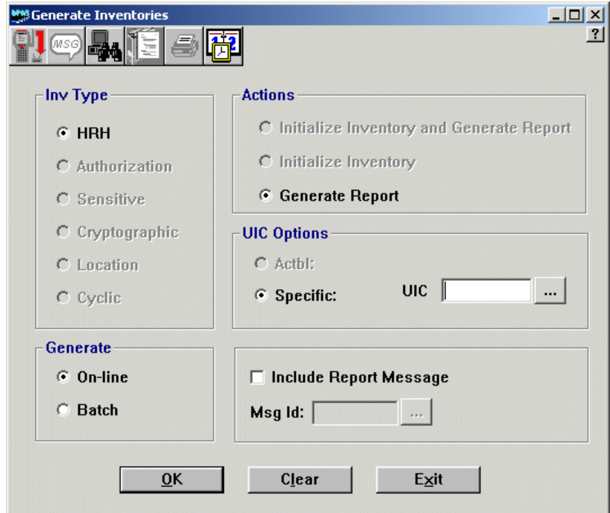
STEP 1:

- Select **Hand Receipt**.

STEP 2:

Inventory Type Group Box:

a. Accept the default **HRH**.



Actions Group Box:

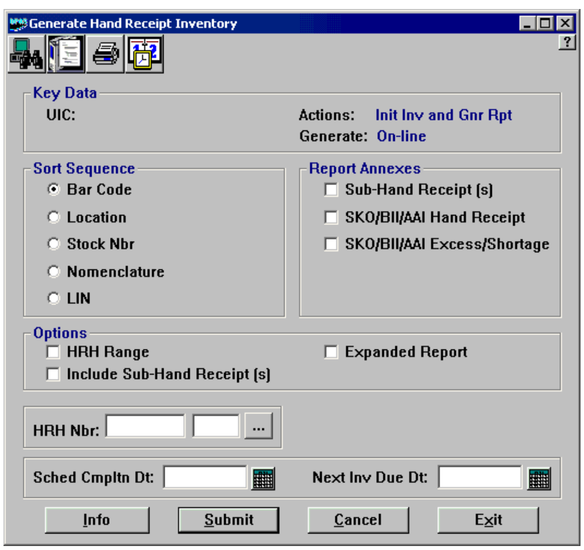
b. Select **Generate Report**.

Generate Group Box:

c. Select whether you want this report to run On-line (immediately) or in the Batch (overnight) process. If your property book is large, it may be a good idea to run this process in Batch so not to degrade the system.

UIC Options Group Box:

d. **Specific UIC:** Enter or browse for you UIC.
e. If you want to include a Report Message, check this box.
f. **Msg Id:** If you chose to include a report message, browse for the message you wish to include. These messages are built in the **Utilities** module.
g. Click **OK**.



STEP 3:

Sort Sequence Group Box:

a. Select the order in which you want your report sorted.

Report Annexes Group Box:

b. If desired, select a report annex report.

Report Type	
Sub Hand Receipt(s)	Check if you wnnt a separate listing for each of your sub hand receipts.
SKO/BII/AAI Hand Receipt	Check if you want a hand report listing of your SKOs, BIIs, and AAIs.
SKO/BII/AAI Excess/ Shortage	Check if you want a excess and shortage report of your SKOs, BIIs, and AAIs.

Options Group Box:

c. If desired, select an option.

Options	
HRH Range	Select this check box if you want to request a range of Major HRH Nbrs. If you also want to include Subs, select the "Include Sub-Hand Receipt(s)" check box. The screen HRH Nbr input field will be deactivated when a HRH Range is entered.
Include Sub-Hand Receipt(s)	Select this check box if you want to request a range of Major HRH Nbrs with all of its Subs included (this can also be used with the HRH Range). The screen Sub HRH Nbr input field will be deactivated when this check box is selected.
Expanded Report	This will generate a more detailed report.

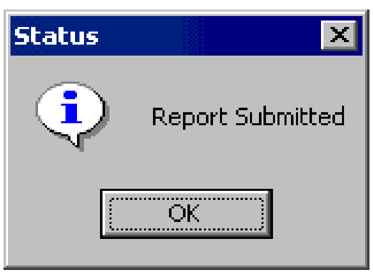
d. **HRH Nbr:** Enter the hand receipt holder for which you are generating this report. If you selected HRH Range in the Options group box, you will be prompted to enter the beginning HRH Nbr and the ending HRH Nbr.

HINT!
Remember...if you are generating a Hand Receipt Report for a range of Hand Receipt Holders, you **MUST** have Security access to **ALL** of the Hand Receipt Holders.

e. Click **Submit**.

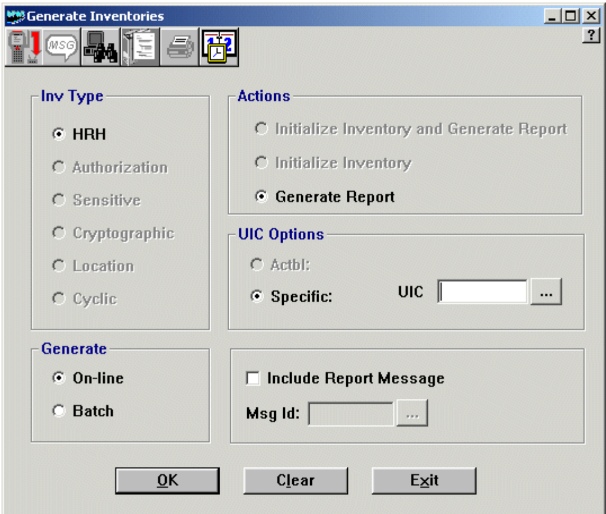
The Sched Cmpltn Dt and Next Inv Due Dt are not available.

The following dialog box is displayed:



f. Click **OK.**

You can now print or view your Hand Receipt Report.

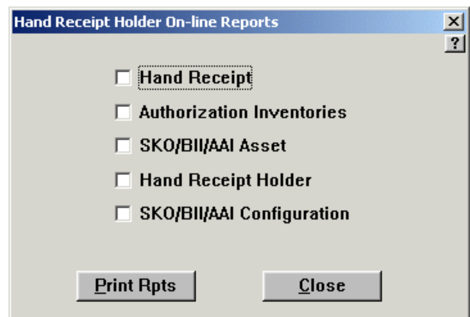


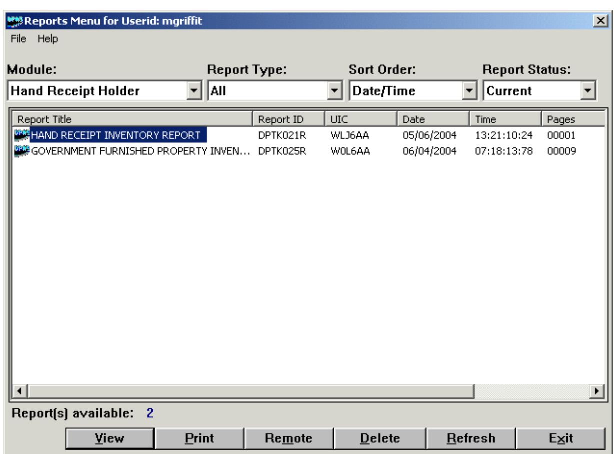
STEP 4:

- Click **Exit**.

STEP 5:

- Click on **Print Rpts**.





STEP 6:

a. Select the **Hand Receipt Inventory Report**. If you had selected to generate the expanded report, your report name would be **Expanded Hand Receipt Inventory Report**.

b. Click **View**.

Below is a sample of the **Hand Receipt Inventory Report** sorted in bar code sequence. This report can also be generated in location, stock number, nomenclature, or LIN sequences.

```
REPORT: DPTK021R                  DEFENSE PROPERTY ACCOUNTABILITY SYSTEM           DATE: 20
ACTBL UIC: ACTBL1                      HAND RECEIPT INVENTORY REPORT
UIC/ACTIVITY: N00015  AA                     BAR CODE SEQUENCE                     INV LIST
ACTIVITY NAME: TEST TRANSFER                                                       SCHED CM
HRH NBR: MEL    -
HRH NM: MG
OFFICE NM: DPAS                 PHONE NBR: 555555

BAR CD      STOCK NBR        SERIAL NBR            LIN    GNRC NOMEN
LOC                   SUB LOC               OFFICE       LCL USE     LST INV DT            ACQ CST

0001500001  3820007256413    C112                  29876Y WASHING AND SCREENING PLANT, ELEC DRVN WHL
BLDG 301                                    SUPPLY                   20020729           19,357.00

CLG9588     7025000001952    CLG9588               71113W MONITOR, 19"COLOR
BLDG 22222                                  DFAS                     20020725            1,431.00


****** END ITEM HAND RECEIPT TOTALS                 TOTAL QTY:        2         TOTAL DOLLAR VALUE

Ready                                                          Pg: 1 of 1    150%        NUM
```

Below is a sample of the **Expanded Hand Receipt Inventory Report** sorted in bar code sequence. This report can also be generated in location, stock number, nomenclature, or LIN sequences.

```
REPORT: DPTK022R                     DEFENSE PROPERTY ACCOUNTABILITY SYSTEM            DATE:
ACTBL UIC: ACTBL1                    EXPANDED HAND RECEIPT INVENTORY REPORT
UIC/ACTIVITY: W0U2AA  1232                      BAR CODE SEQUENCE                      INV L
ACTIVITY NAME: RLSE 16 TEST                                                            SCHED
HRH NBR: W0U2AA -
HRH NM: RELEASE 16 TESTER
OFFICE NM: DPAS TRAINING         PHONE NBR: 712 554-2234

                                                                                          FND
BAR CD       STK NBR          SUB  LOC                      QTY  UI  LST INV DT  LCL USE     CD
OFFICE       SER NBR          HRH  SUB LOC                           ACQ CST     IPE NBR
LIN          GNRC NOMEN                                                          ASST STS CD

             1005000012676        BUILDING 25                 1  EA  20020723                16
DFAS         23456                                                    131.80
             FILTER,GUN DRIVE
       MFR YR: 2002 MFR NM: UNASSIGNED                           MFR PART NBR:

             1005000012676        BUILDING 25                 1  EA  20020723                16
DFAS         23457                                                  1,311.80
             FILTER,GUN DRIVE
       MFR YR: 2002 MFR NM: UNASSIGNED                           MFR PART NBR:

Ready                                                          Pg: 1 of 1    150%
```

HRH Process Example: Where HRHs Can Request Items for Turn-In/Transfer

Property Book Officer

- PBO creates a new Hand Receipt Holder with second level authority.
- Turn-in/Transfer process by Hand Receipt Holder

Hand Receipt Holder

- HRH module, HRH identifies items by requesting selected items for Turn-in/Transfer.

Property Book Officer

- PBO actions are reviewing HRH pending requests. During review of requested actions the PBO either approves or denies the requests. With approval the PBO assigns a document number. Then the item is held as a pending action for HRH to complete request.

Hand Receipt Holder

- HRH reviews HRH Inquiry "HRH Pending Turn-in/Transfer" for PBO approval.
- With Approval HRH goes to Hand Receipt Module to Database/UIC Transfer Action "Generate Turn-in Form" and print.
- HRH then completes the Turn-in/Transfer action and get signature on turn-in form.
- HRH would then send the Turn-in/Transfer form to the PBO.

Property Book Officer

- PBO would then complete the Turn-in/Transfer action by dropping the item from the property book.

Hand Receipt Holder Transfer Process for Bulk Assets

This process has three basic steps:

1. HRH request the transfer
2. PBO approves or disapproves transfer
3. Receiving HRH accepts the transfer in

Below is a basic step-by-step process of HRH transfer.

PREREQUISITES

HRH must have HRH Holder Transfer In Authority.

Hand Receipt Holder transfer to Hand Receipt or Sub Hand Receipt Holder:

1. Hand Receipt Holder Request Transfer

- HRH clicks on Hand Receipt Holder => Turn in/Transfer
- Select HRH Transfer and check Bulk Asset
- Enter Bulk Bar code and click OK
- Enter Hand Receipt and Sub in the TO: HRH Nbr
- Enter the Quantity to transfer
- Enter the Excess Avail Dt:
- Enter the HRH remarks
- Click on ADD

2. PBO Approval Action

- PBO goes to Hand Receipt Module
- Select HRH pending Turn in/Transfer
- Select the HRH Transfer Button
- Enter the UIC
- Click OK
- Select the requested transfer
- Click OK
- PBO can then Approve transfer
- Click Save.
- Click Exit

3. Hand Receipt Holder Receiving

- Go to Hand Receipt Holder Module
- Select Turn in/Transfer
- Select All in Key Data screen
- Click OK
- Select the Transfer in request and double click request
- Select Disapproval, if necessary
- Select Document Number method, if necessary
- Enter Authorization Control Number
- Enter Location and Office
- Enter Remarks
- Click Save

NOTE:

- PBO must perform the transfer in HRH for HRH without transfer authority.
- PBO can process the transfer by clicking on HRH Transfer Button on Right side of Hand Receipt Pending Turn-in /transfer screen
- PBO clicks OK
- Assign the Authorization Control Number, Office, Location, and Sub Location and document number if necessary.
- Click Save

Skill Builder: Hand Receipt Holder Functions and Processes

Objectives: This skill builder will allow you to:

- **Review Creating a Sub-Hand Receipt Holder**
- **Making Selected Changes**
- **Requesting Permission to Turn-In an Asset**
- **Transferring an Asset to Another Hand Receipt Holder**
- **Transferring an Asset to Another UIC**
- **Transferring-In an Asset**
- **Generating a Hand Receipt Report by HRH Number.**

Complete the following exercises (Select the correct or most appropriate answer):

1. The two selected changes that can be make in the Hand Receipt Holder Module are:

   a. Name and Phone Number of HRH and the Location of the Asset
   b. Location of Asset and Stock Number of the Asset
   c. Sub Hand Receipt Holder Number and Location/Sub Location of Asset
   d. Sub-Location of Asset and Nomenclature

2. When deleting a Sub-HRH, you first must accomplish the following:

   a. Obtain permission from the individual's supervisor
   b. Add the new Sub-HRH Number and verify the location of the assets
   c. Conduct an Inventory of all assets and assign a new Sub-HRH Number
   d. All assets assigned must be transferred or turned in prior to deletion

3. When requesting permission to turn-in an asset, both Property Book and Non-Property Book items may be requested for turn-in to the PBO/PPM. **(True or False)**

   True _______ False _______

4. Name four (4) data elements or entries that are mandatory on the Key Data Screen for the transfer of a Bulk Asset to another Hand Receipt Holder.

   a. Disposition Action, Non-Property Book Asset, Manufacturer Part Number and Excess Action Code
   b. HRH Remarks, Disposition Action, UIC and Bulk Asset
   c. Disposition Action, Stock Number, Serial Number, and HRH Number
   d. Disposition Action, Bulk Asset, HRH Number and Stock Number

5. To transfer a serial asset from one UIC to another UIC on the same database using the Hand Receipt Holder Module, some of the data elements needed include:

   a. Stock Number/Serial Number or Bar Code, UIC To, and Excess Available Date
   b. Stock Number/Serial Number or Bar Code, HRH Number of the Gaining UIC, and Disposition Code
   c. Bar Code, Excess Availability Date, and PBO Remarks
   d. PBO Remarks, UIC To, Stock Number and Bar Code

6. The only Inventory Type that is available to the Hand Receipt Holder and the only action that the Hand Receipt Holder can select when generating a Hand Receipt Report is:

   a. Location and Initialize and Generate Report
   b. HRH and Generate Report
   c. Location and Generate Report
   d. HRH and Initialize Inventory

7. When conducting a Transfer-In Of An Asset action, once a record is chosen, the record's UIC, HRH Nbr To and QTY fields will be displayed and disabled. The user will then have to enter an:

   a. Authorization Control Number (if your organization uses Authorizations), Office and Location
   b. UIC, HRH To Number and location
   c. Office and Location, UIC To, and HRH To Number
   d. Authorization Control Number, Office, Document Number, and sub-location

8. Once a transfer action is processed using the Hand Receipt Holder Module, the request will be available to the Approving Officer for approval/disapproval as seen in the:

   a. Authorization Module
   b. Document Register Module
   c. Hand Receipt Holder Module
   d. Hand Receipt Module

9. Since only asset location and asset responsibility can be changed in the Hand Receipt Holder Module, other changes such as price adjustments, stock number/bar code changes, as well as adding or removing items from the property book are performed within the:

   a. Catalog Module
   b. Authorization Module
   c. Hand Receipt Module (Property Book)
   d. Catalog Module and Authorization Module

10. In order for Major/Sub Hand Receipt Holders to perform transfers, the Property Book Officer must:

    a. Have access to the Major/Sub Hand Receipt Holder's Hand Receipt
    b. Obtain permission from the Major/Sub Hand Receipt Holder's supervisor
    c. Provide the Major/Sub Hand Receipt Holder with a letter of authorization
    d. Grant HRH Transfer Authority to the Major/Sub Hand Receipt Holder in the hand Receipt Module

Inquiries Overview

Each inquiry screen displays a list box containing all the data elements that appear in the module. The selection of a single or multiple data elements (maximum of ten) can be used to narrow the selection of records for the inquiry.

Inquiry Objectives

Upon completion of this DPAS module, you will be able to:

- Identify the tools buttons on your query screens
- Select fields for your query
- Display results of your query

The Tools On Your Query Screens

Tools on the **End Item Serial** and **Component Serial/Bulk** query screens:

Catalog/Mfr	Displays Catalog/Manufacturer data for your record.
IT/Excess	Displays ARMS/Excess data for your record.
Accounting	Displays Accounting data for your record.
Inventory	Displays Inventory data for your record.
Deprn	Displays Depreciation data for your record.

Tools on the **End Item Bulk** query screen:

Catalog/Mfr	Displays Catalog/Manufacturer data for your record.
Excess	Displays Excess data for your record.
Inventory	Displays Inventory data for your record.

Tools on the **SKO/BII/AAI** query screen:

SKO/BII/AAI	Displays SKO/BII/AAI data for your record.
Inv	Displays SKO/BII/AAI inventory data for your record.
Publ	Displays Publication data for your record.

Tools on the **Catalog** query screen:

IT	Displays ARMS data for your record.
Maint	Displays Maintenance data for your record.

Tools on **All** query screens (these are found on the bottom of the query screens):

Previous	Displays the Previous record.
Next	Displays the Next record.
New Inquiry	Allows you process a new query.
Exit	Exits the query screen.

Displaying Query Results

MODULE: Inquiries

INTRODUCTION

The following process will show you how to use the inquiries in DPAS. Inquiries can be viewed in two formats:

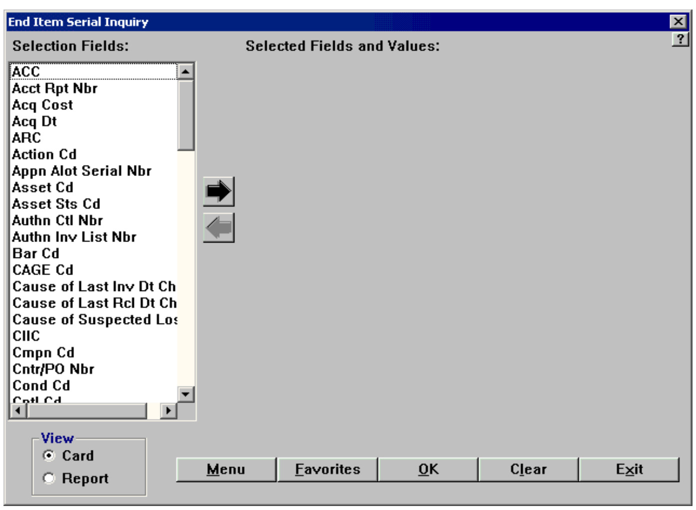
- **Card View:** A record by record query view (this is the default format).
- **Report View:** User-directed data elements displayed in a spreadsheet format which can be exported to a text or Microsoft Excel file.

PREREQUISITES

None

STEPS TO PERFORM ACTION (for Card View)

1. Select the module for which you will be querying.
2. Select the **Inquiries** from the program group.
3. Select the inquiry topic you wish to generate from the program list.



STEP 1:

You can query on any of the fields in the **Selection Fields** list box **OR** you can select ***multiple*** fields for your query.

a. Scroll down the list box and select the field you want to query. You can select this field by highlighting it and click on the black arrow that points to the right **OR** you can simply double-click on the field.

NOTE:

You can de-select a field simply by clicking .

If you want to select ***everything*** on a particular table, just click **OK** without selecting any fields.

b. Once you have selected the field(s) you wish to query, you will need to set the criteria for the search. Click on the drop down list and select the applicable operator.

Operators			
=	Equal to	>	Greater than
<>	Not equal to	=>	Greater than or equal to
<	Less than	..	Range of values
<=	Less than or equal to	**List**	Creates a list of values

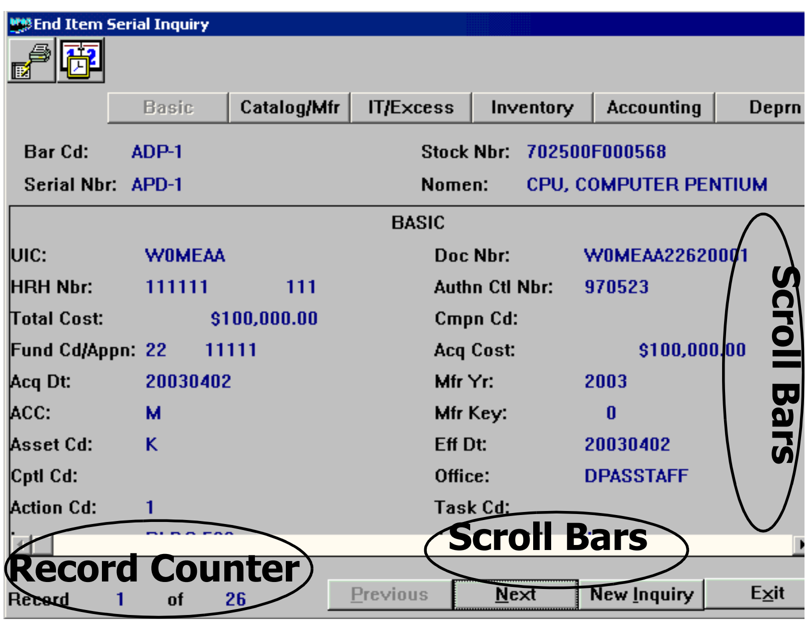
c. Once you have your operator set, enter the value you are searching. For example, if you were looking for everything that had an acquisition cost of $5,000 or more, you would select the Acq Cost field, set the operator to => (greater than or equal to), and in the value box, enter 5000 (no commas or decimal points are needed).

HINT!
You can perform ***wildcard*** searches on any field by using the **asterisk** (*). For example:

7025* = Searches for **7025** at the *beginning* of the field.
***7025** = Searches for **7025** at the *end* of the field.
7025 = Searches for **7025** *anywhere* in the field.

d. Once you have entered all your search criteria, to process the inquiry, click **OK** or press the **Enter** (or Return) key on your keyboard.

A card view format screen similar to the following is displayed:



More Tool Buttons

The buttons below are found on the bottom of the query screen.

Menu	Displays system inquiry menus. For example, if you are in the **End Item Serial** inquiry and you want to go to the **Catalog** query, click this button and it will display the other modules. Select the module and type of query you want to perform.
Favorites	Allows you to save any favorite queries.
OK	Displays ***everything*** on a particular table.
Clear	Clears any data you have entered into a window.
Previous	Displays the previous record.
Next	Displays the next record.
New Inquiry	Returns processing to the inquiry selection criteria window.
Exit	Exits out of the process without submitting any information for processing.

Displaying Your Query In Report Format

INTRODUCTION

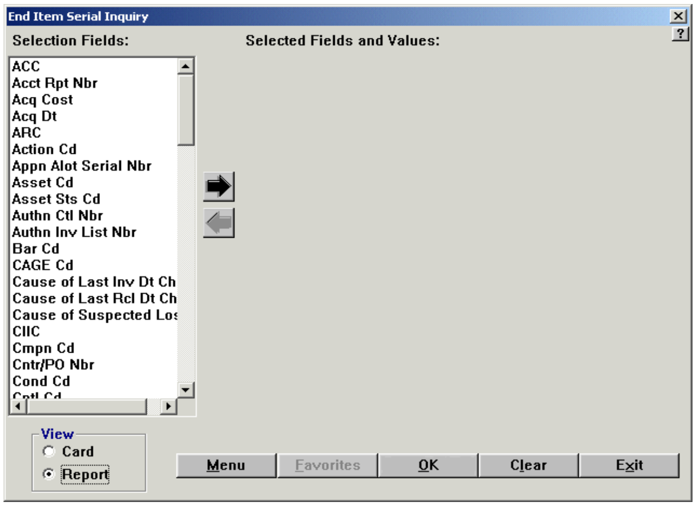
The following process will show you how to display your queries in report format. Report Format will allow you see multiple records instead of one record at a time.

PREREQUISITES

None

STEPS TO PERFORM ACTION (for Report View)

1. Select the module for which you will be querying.
2. Select the **Inquiries** from the program group.
3. Select the type of inquiry you wish to generate from the program list.
4. Select the **Report View** radio button.



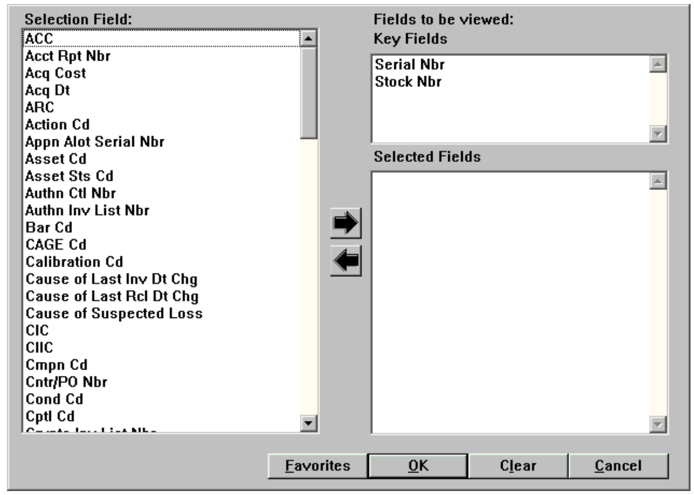
STEP 1:

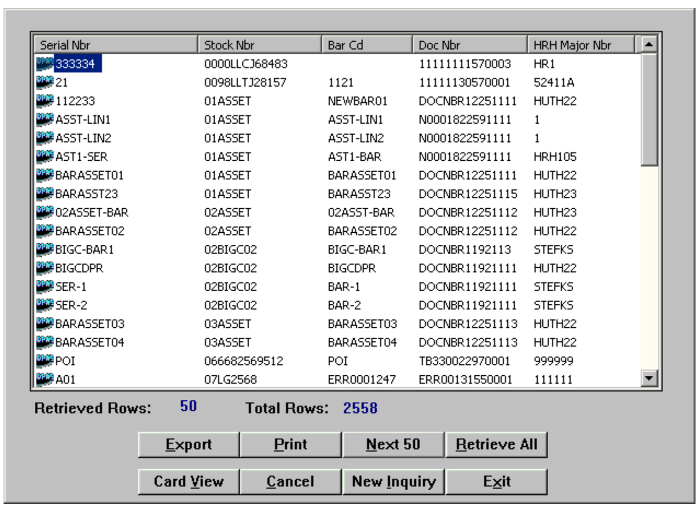
a. Scroll down the list box and select the field you want to query. You can select this field by highlighting it and click on the black arrow that points to the right **OR** you can simply double-click on the field.
b. Once you have selected the field(s) you wish to query, you will need to set the criteria for the search. Click on the drop down list and select the applicable oper-atorEnter your search criteria.
c. Once you have your operator set, enter the value you are searching. For exam-ple, if you were looking for everything that had an acquisition cost of $5,000 or more, you would select the Acq Cost field, set the operator to => (greater than or equal to), and in the value box, enter 5000 (no commas or decimal points are needed).
d. Click **OK** or press **Enter** on your key-board.

STEP 2:

a. Select the fields that you want displayed on your query. These fields will be displayed in the **Selected Fields** window.
b. Click **QK** or press **Enter** on your keyboard.

NOTE:
The fields displayed in the **Key Fields** are the *indexed* fields for this table. You cannot change or delete any of these fields.





Serial Nbr	Stock Nbr	Bar Cd	Doc Nbr	HRH Major Nbr
333334	0000LLCJ68483		11111111570003	HR1
21	0098LLTJ28157	1121	11111130570001	52411A
112233	01ASSET	NEWBAR01	DOCNBR12251111	HUTH22
ASST-LIN1	01ASSET	ASST-LIN1	N0001822591111	1
ASST-LIN2	01ASSET	ASST-LIN2	N0001822591111	1
AST1-SER	01ASSET	AST1-BAR	N0001822591111	HRH105
BARASSET01	01ASSET	BARASSET01	DOCNBR12251111	HUTH22
BARASST23	01ASSET	BARASST23	DOCNBR12251115	HUTH23
02ASSET-BAR	02ASSET	02ASST-BAR	DOCNBR12251112	HUTH23
BARASSET02	02ASSET	BARASSET02	DOCNBR12251112	HUTH22
BIGC-BAR1	02BIGC02	BIGC-BAR1	DOCNBR1192113	STEFKS
BIGCDPR	02BIGC02	BIGCDPR	DOCNBR11921111	HUTH22
SER-1	02BIGC02	BAR-1	DOCNBR11921111	STEFKS
SER-2	02BIGC02	BAR-2	DOCNBR11921111	STEFKS
BARASSET03	03ASSET	BARASSET03	DOCNBR12251113	HUTH22
BARASSET04	03ASSET	BARASSET04	DOCNBR12251113	HUTH22
POI	066682569512	POI	TB330022970001	999999
A01	07LG2568	ERR0001247	ERR00131550001	111111

STEP 3:

- Use your scroll bars to scroll through the records. You can also double-click on the record you wish to view in card format.

The Tool Buttons:

This will allow you to export to either a text file or to Microsoft Excel.

This will allow you to print your query. If your report is over 80 characters wide, DPAS will display a message telling you that your report is over 80 characters wide and that you should change your printer to landscape mode, compressed print, or reduce the number of characters prior to printing. You will have the option to continue.

This will allow you to display the next 50 records. The window will only display about 50 records, so use your scroll bars to scroll through the records.

This will retrieve all the records. If you have more than 250 records, DPAS will display a message telling you that you are retrieving more than 250 records and that this process could take some time. You will have the option to continue.

This will display the highlighted record in card view format.

This will cancel your display and return you to the previous screen.

This will allow you to generate a new inquiry.

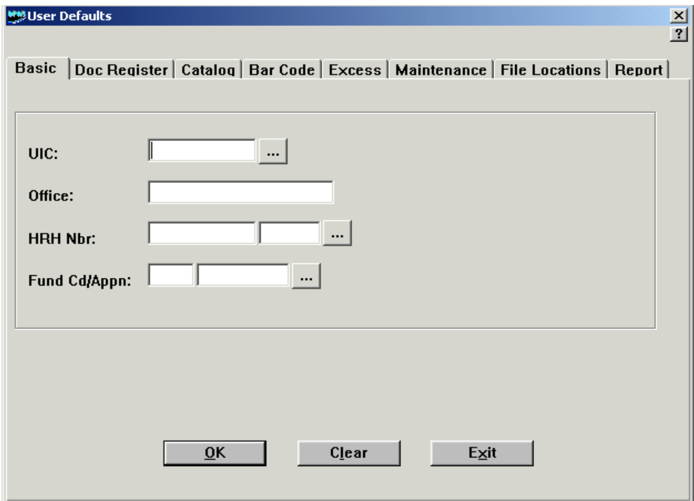
This will exit the query.

Favorites

File Locations

Prior to storing any query, you must point DPAS to the file location to where you wish to store your queries.

1. From the DPAS Main Menu, click on **File**.
2. Select **User Defaults** from the program group.

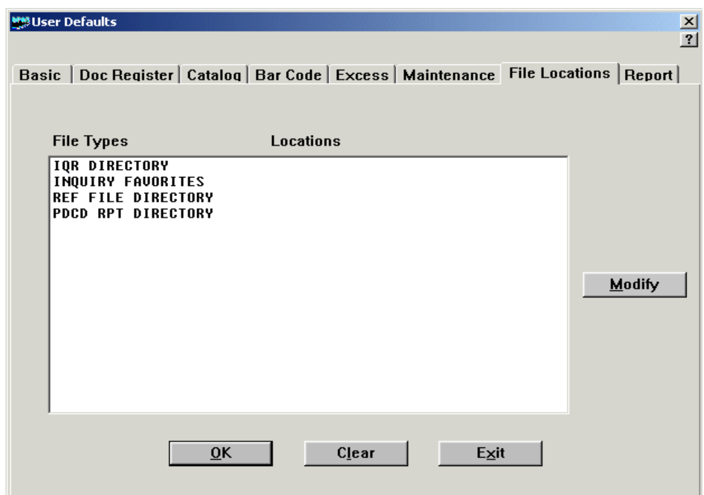


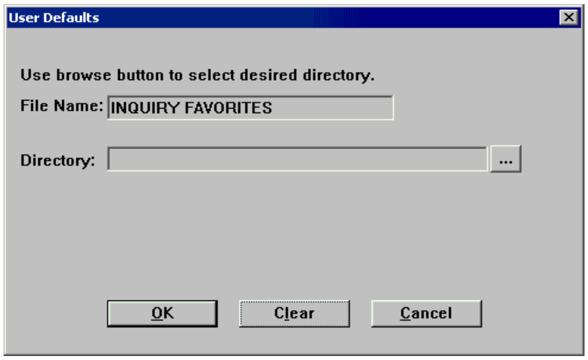
STEP 1:

- Click on the **File Locations** tab.

STEP 2:

a. Highlight **INQUIRY FAVORITES**.
b. Click **Modify**.

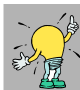




STEP 3:

a. **Directory:** Click on the browse button and select the path to which you will be saving your favorite queries. For example: C:\Desktop\Favorite Queries.

b. Click **OK**.



HINT!
If you are going to share your favorite queries with others on your database, you may want to store your queries on a shared drive.

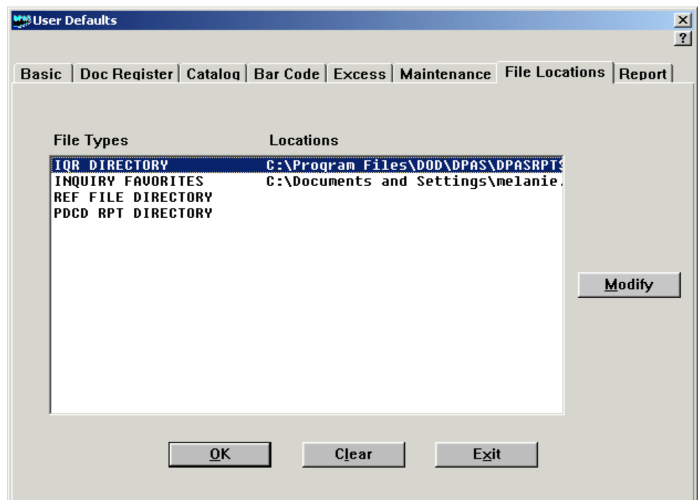
STEP 4:

a. Click **OK**.

The Transaction Processed dialog box is displayed.

b. Click **OK**.

You are returned to the DPAS Main Menu.



Storing Your Favorite Queries

There may be times where you may want to save your query for future use. You can save either in **Card View** or **Report View**.

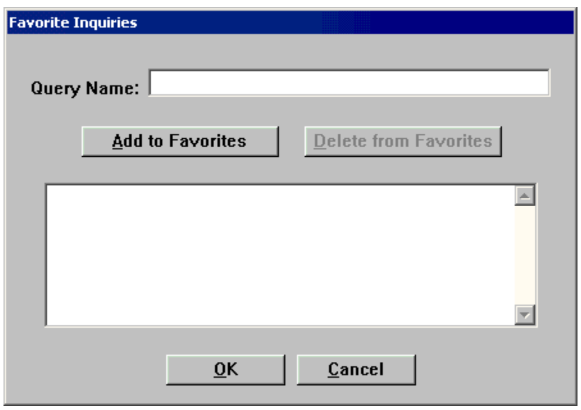
You can store an infinite number of favorite queries.

This exercise will illustrate how to store your favorite queries.

1. Create a query that you may generate routinely.
2. Click on the 

button.

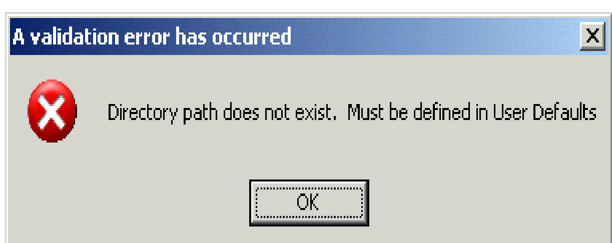
The following screen is displayed:



a. **Query Name:** Give your favorite query a name. This name can be up to 30 characters long.
b. Click **Add to Favorites**.

Once you click on the **Add to Favorites** button, your query is displayed in the window.

If you have not entered a path for storing your queries, the following error message will be displayed:



Retrieving Your Favorite Queries

To retrieve a stored query:

1. Go to the type of query you wish to process (for example: Hand Receipt > End Item Serial), and the type of viw in which you saved the favorite query.

2. Click the 

button.

STEP:

a. Highlight the query you wish to generate.
b. Click **OK**.

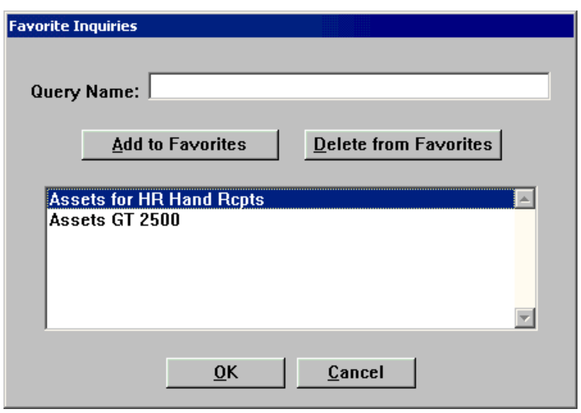
You can now process your query.

Deleting A Favorite Query

1. Go to the type of query you wish to delete (for example: Hand Receipt > End Item Serial).

2. Click the 

button.

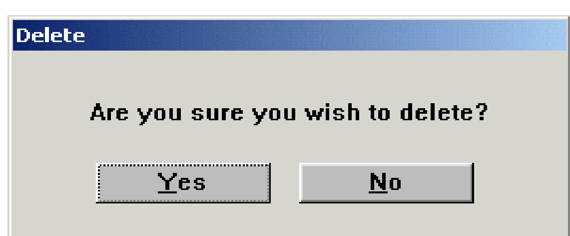


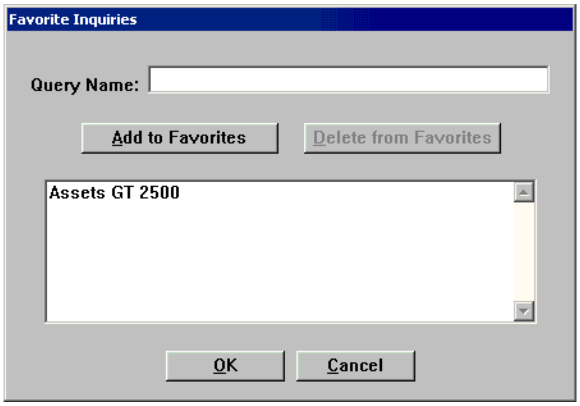
STEP 1:

a. Highlight the query you wish to delete.
b. Click **Delete from Favorites**.

STEP 2:

- If you wish to delete the query, click **Yes**, otherwise, click **No**.





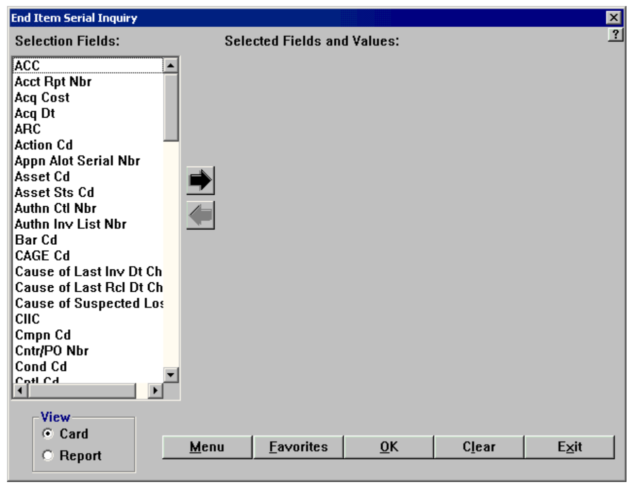
STEP 3:

- Click **OK**.

STEP 4:

- Click **Exit**.

You will be returned to the DPAS Main Menu.

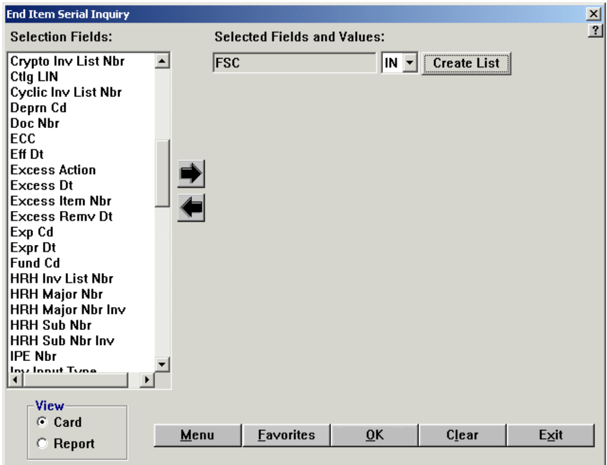


Creating A Query List

There may be times when you would want your query to display a variety of data. For instance, you may want to display assets of different stock numbers or assets for different hand receipt holders, etc. This process will illustrate how to create lists for your queries.

In this exercise, you will display assets on the Hand Receipt that have a variety of Federal Supply Classes.

1. Select the **Hand Receipt** icon, or select **Hand Rcpt** from the menu bar.
2. Select **Inquiries** from the program group.
3. Select **End Item Serial** from the program list.



STEP 1:

a. Scroll down the Selection Fields list and select the **FSC** field.
b. In the Operator drop down list, scroll down and select the operator **IN**.
c. Click on the **Create List** button.

STEP 2:

a. Enter **7025** in the first window.
b. Click **Add**.
c. Repeat steps a and b and use the FSCs **2320** and **1005**.
d. Click **OK**.

You are returned back one screen.

e. Click **OK**.

If you manipulate through the inquiry, you will notice that the only records displayed have an FSC of either 7025, 2320, or 1005. Since you are in card view format, you may need to click on the **Catalog/Mfr** button to display the FSC.

f. When you are done reviewing your query, click **Exit**. You will be returned to the DPAS Main Menu.

Printing An Inquiry Screen

There may be times when you wish to perform a screen print. Currently, there is no button that will perform this function.

This exercise will illustrate how to perform a screen print and adding the date/time stamp to your screen. This can be done using any screen in DPAS, not just the query screens.

1. On any inquiry screen, you can depress  from the tool bar at the top of the screen.

The **Print** dialog box is displayed.

2. Select your desired printer.
3. Click **OK**.

Your file should now print to the designated printer.

Skill Builder: Inquiries

Card View Format (End Item Serial)

1. Perform card format inquiry for Serial Number **DP01000404**.

2. Perform an inquiry with wild card characters ***COMPUTER***. Search the records for the computer assigned to your hand receipt and find **Last Inventory Date** and **Inventory User ID** who conducted the inventory.

Report Format

3. Perform a Report Format inquiry of your Hand Receipt.

    - Build your report with data fields **Major Hand Receipt**, **Sub Hand Receipt**, **MFR Name**, **Nomen** and **Location**.
    - Create and save MFR Name query in Favorites.
    - Run MFR Name query
    - Export to Excel

4. Where do you find the folder director for Favorites?

Bulk Item Inquiry (End Item Bulk)

5. Run an inquiry for LINs **C96536** and **F30117** in one report format.

Options On The Toolbar

 This displays the ***first*** page of your report.

 This only displays the ***next*** page of your report.

 This displays the ***last*** page of your report.

 This allows you to ***select*** which page in your report you want to see.

 This allows you to ***zoom in*** (or magnify) your report.

 This allows you to ***zoom out*** (or de-magnify) your report.

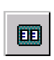
 This allows you to ***close*** the output window you are in.

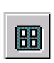
 This allows you to ***save*** your report.

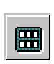
 This allows you to ***print*** your report.

 This allows you to ***preview*** your report.

 This allows you to ***export*** a file to another application.

 This allows you to view ***two pages***.

 This allows you to view ***four pages***.

 This allows you to view ***six pages***.

 This allows you to ***open*** a new file.

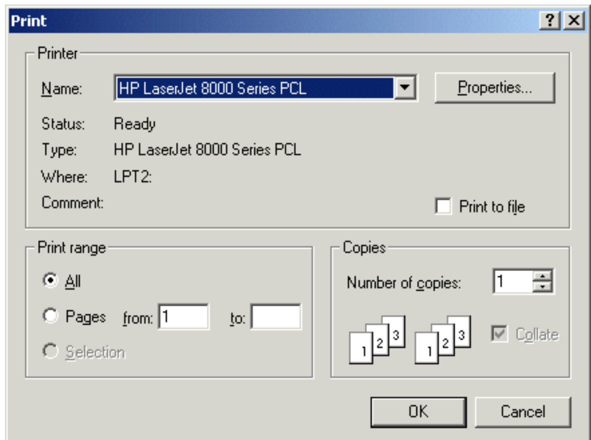
 This allows you to get help on anything that is displayed in the Eureka window. When you select the Context Help button from the toolbar your pointer changes to look like the Context Help button. You can then click any part of the Personal Edition window, including a menu selection, toolbar button, and so on, to get help on that item.

Printing A Report

To print a report use the following steps:

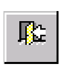
1. With your report still displayed, click  on the toolbar.

The Windows Print dialog box similar to the following is displayed:



Here, you can change the printer you want to print to, set a print range, change the properties and/or determine the number of copies you want printed – just like any other Windows application.

2. Click **Cancel** for this exercise (we may not have a printer to print to). Of course normally, you would click **OK**.

3. Click ; this will close the output window.

Printing To A Remote Printer

INTRODUCTION

You can send your report to a network printer (such as a high-speed printer) by using the FTP option, or you can use the MORDS option.

File Transfer Protocol (FTP)

File Transfer Protocol (**FTP**) is a program that allows you to copy a file from one machine to another. In this case, you are given the capability to copy your print files to your own print server or PC or any other addressable machine you have access to.

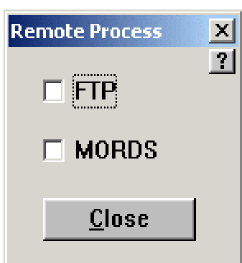
PREREQUISITES

You will need to have an IP Address and Password to the machine you are FTPing to.

STEPS TO PERFORM ACTION

With your list of reports displayed, select the report you want to FTP and click 

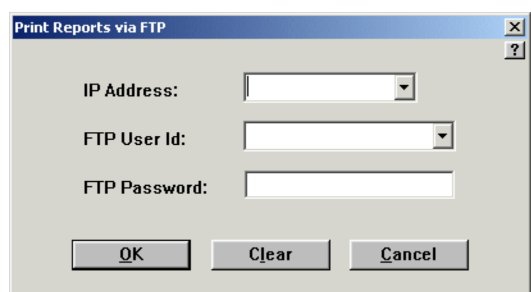
.



STEP 1:

- Check the **FTP** check box.

STEP 2:



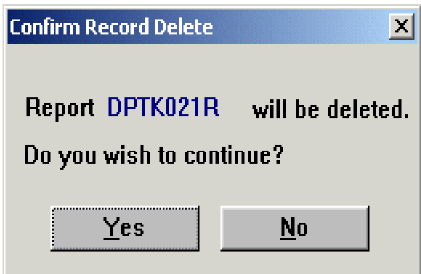
a. **IP Address:** Enter a valid IP Address for the printer.
b. **FTP User Id:** Enter your user id for the printer you are printing to.
c. **FTP Password:** Enter your password for the printer you are printing to.
d. Click **OK**.

Deleting A Report

To delete a report, use the following steps:

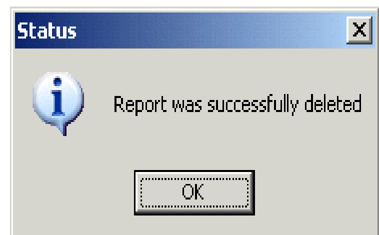
1. With your list of reports displayed, highlight the report you want to delete.
2. Click **Delete**.

A dialog box similar to the following is displayed:



a. Click **Yes** to delete.

b. Click **OK**.



You are returned to the Reports Menu.

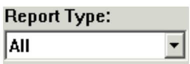
c. If you want to delete another report you can do so at this time; otherwise, click **Exit** and you will be returned to the DPAS Main Menu.

Other Options In The Reports

There are other options in the Reports queue available to you. They include:

This button will re-display the list of available report files.

This will allow you to display reports from certain modules, or you can display all reports from all modules.



This will allow you to display on-line reports only, batch reports only, or all reports.

This will allow you to sort your reports by Date/Time, Module, Report ID, or Report Title.

This will allow you to display either the current or the previous day’s reports.

Skill Builder: Reports

All Users:

- Generate a HRH Report for your Hand Receipt Number
- View Reports from Print Rpts button and File Menu
- Delete one report from Print Menu

Army Users:

- Generate a Authorization by UIC
- Generate an Authorization by Hand Receipt Number for Property Type Code 9.

Eureka

OVERVIEW

Eureka is an independent software package used in conjunction with DPAS to enable users the capabilities to view pre-existing reports, perform ad hoc queries, analyze data, and create simple to sophisticated reports from within a Microsoft Office Desktop environment.

Documents may begin as a simple QuickQuery and evolve into sophisticated FreeForm presentations.

Eureka offers two ways to create documents:

- **QuickQuery** - provides you a set of interactive tools that let you view data as you build your query in a spreadsheet-like environment. It provides the fastest way to build design documents whose content is limited to column values and custom calculations. You can add page headers and footers. You can group data and include totals for each group. QuickQuery also lets you define and store multiple query filters and apply them individually or in combination with each other.

- **FreeForm** - allows you the ability to lay out your document without the constraints of QuickQuery. You can add page headers and footers, document headers and footers and group headers, and other types of document areas. Using the FreeForm function, you will develop a customized report, with the capability to make that report as simple or complex as necessary. FreeForm allows you the freedom to design all aspects of the report.

Both QuickQuery and FreeForm offer a step-by-step Wizard in designing reports.

Design documents can be quick and simple, composed of just a few unformatted database columns arranged in rows. They can be complex, highly formatted documents that include charts and crosstabs as well as other documents. When you create output documents, Eureka creates and submits database queries. A document may include one query or several.

Eureka Reporter Designer comes packaged for DPAS in these editions:

- **Reporter Designer** - gives you both interactive QuickQuery tools and powerful FreeForm tools to create queries, reports, charts, and crosstabs.

- **Reporter Viewer** - lets you submit queries for already defined documents and view, print, export, and save the results. The Reporter Viewer is designed for users that do not have Eureka installed.

OBJECTIVES

This course is designed for you to develop progressively greater competencies in the use of the *Eureka* Reporter Designer.

Upon completing this course, you should be proficient in the use of *Eureka* to retrieve from DPAS, the information necessary to accomplish your assigned duties.

Learning To Use Eureka

The process of creating a document using Eureka is as simple as defining the objects you want to appear on your document and placing them on the document. Eureka also includes many advanced query design features.

Terminology

Eureka has its own set of data base terminology, such as areas, area objects, hot objects, iqo, iqr, etc. These will be explained during the course of this training.

Mouse Terminology

This is the terminology used for mouse actions:

Term	Action
Click	Move the mouse pointer to an object. Then press and release the left mouse button (without moving the mouse). In *Eureka*, clicking an object selects it or deselects it. When an object is selected, menu items and keyboard actions affect that object (unless they are global actions).
Double-click	Move the mouse pointer to an object. Then press and release the left mouse button twice in rapid succession, without moving the mouse pointer. In *Eureka*, double-clicking opens a dialog box that lets you define or change the object you have double-clicked.
Drag	Move the mouse pointer to an object, press and hold the left mouse button. Then move the mouse and release the mouse button at a new location. The object moves to the new location. In *Eureka*, you can drag objects to move them, to add them to your document, and use them in many dialog boxes
Right-click	Move the mouse pointer to an object. Then press and release the right mouse button without moving the mouse. In *Eureka*, a right-click opens a shortcut menu. This is a menu of actions associated with the object on which you right-click.
CTRL+click	Hold down the **CTRL** key while you press and release the left mouse button. In *Eureka*, this selects an object for further manipulation without deselecting any already-selected objects.
SHIFT+click	Hold down the **SHIFT** while you press and release the left mouse button. Whenever you are selecting items from a list that allows more than one item to be selected, you can use **SHIFT+click** to select a range of items. Click the first item and then **SHIFT+click** the last item. *Eureka* selects the two items you click and all items in between them in the list.

On-Line Help

The help system in *Eureka* includes a list of frequently asked questions.

- To view the description and help information for a specific object in an object directory, move the mouse pointer to the object and then press and hold down the right mouse button.
- To get help in a dialog box, press the **F1 Function Key** or select the **Help** button.
- To get help in a *Eureka* window, press the **F1 Function Key** or select **Help** from the menu bar.
- To view the frequently asked questions list, open the help system and select **Frequently Asked Questions** from the contents page.

When you are using the help system, these shortcuts are available:

- There is a Chapter menu included as part of the help system menu bar. Use it to go directly to another chapter.
- Use **CTRL+PAGE UP** and **CTRL+PAGE DOWN** to go through a chapter page by page. You can use the browse buttons on the toolbar (< and >) to do this.
- Use the icons above each topic title to help you find topics and navigate the help system. See the help topic **Hints for Using Help** for information about using these icons.

Using the Context Help Button

To get help on anything that is displayed in the *Eureka* window, select the Context Help button from the toolbar. When you do so, your pointer changes to look like the Context Help button. You can then click any part of the *Eureka* window, including a menu selection, toolbar button, an so on, to get help on that item.

Object Help

To see a description of a business view, folder, or column shown in the object directory, place the mouse pointer on the object. *Eureka* displays a help message for the object.

Changing Your *Eureka* Password

INTRODUCTION

This process will show you the procedures used to change your password in *Eureka* Anytime you change your login or password for DPAS, you must also change them to the same for *Eureka*. When you change your password in DPAS, you will get a pop-up message to change your password in *Eureka*.

OBJECTIVES

To allow the user to understand when and how to change the *Eureka* password.

APPLICATION

You have just changed your DPAS password and now you need to change it in *Eureka*.

PREREQUISITES

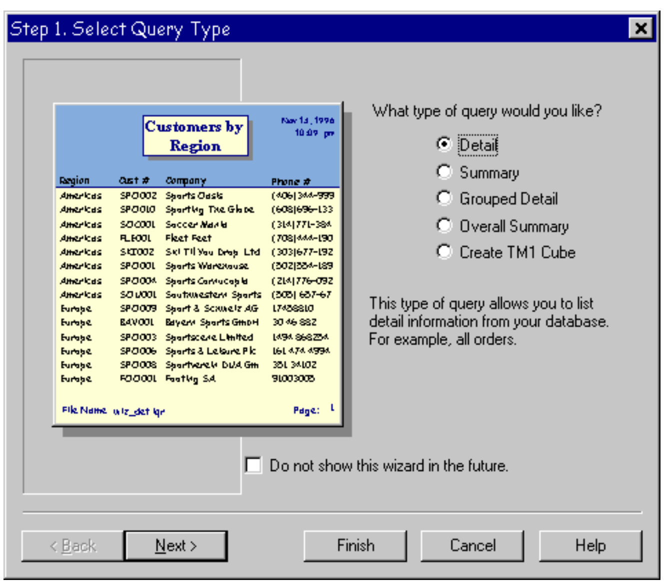
Eureka Reporter Designer is correctly loaded and configured.

ACTIVITY

Instructor-led demonstration

STEPS TO PERFORM ACTION

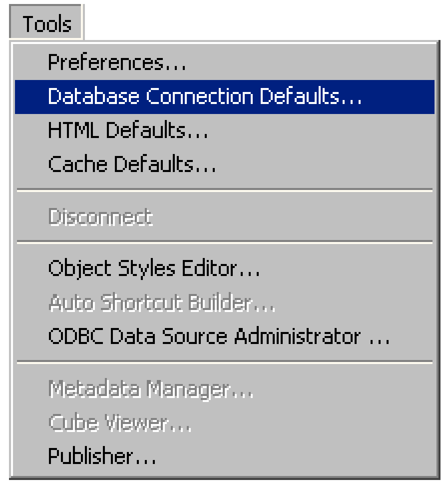
1. Select **Ad Hoc Reports** icon or select **Ad Hoc** from the menu bar.
2. Select ***Eureka*** from the program group.



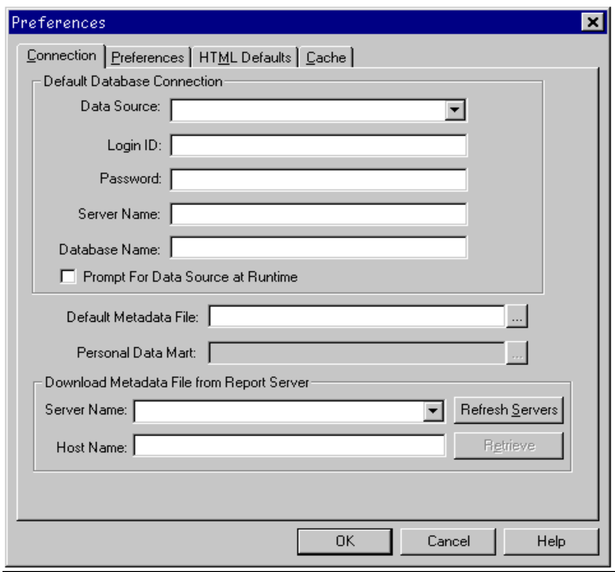
STEP 1:

- If you get the wizard, click **Finish**; otherwise, go to the next step.

STEP 2:



a. From the menu bar, select **Tools**.
b. Select **Database Connection Defaults...**



STEP 3:

a. **Data Source:** Make sure that your DPAS Site ID is displayed.
b. **Login ID:** Make sure that your DPAS User ID is displayed.
c. **Password:** Enter your **NEW** DPAS password.
d. **Server Name:** Leave this field blank.
e. **Database Name:** Leave this field blank.
f. **Prompt For Data Source at Runtime:** Do not check this box. If checked, you will be prompted to enter your DPAS Site ID each time you run a report.
g. **Default Metadata File:** Browse for where the DPAS programs reside on you workstation. If all the defaults were taken during installation, then the path is normally: **C:\Program Files\DOD\DPAS\DPAS.iqk**.

If you are unable to locate the DPAS.iqk file, click on the **START** button, select **Find** (or **Search** if using Windows ME or 2000), **Files or Folders...**, enter **dpas.iqk** look in the Local Hard Drives.

h. **Server Name:** Leave this field blank.
i. **Host Name:** Leave this field blank.
j. Click **OK.**

Setting Preferences

INTRODUCTION

Eureka gives you control over your working environment in the following areas:

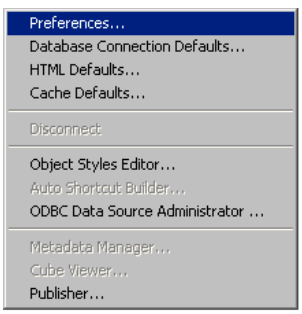
- Which tools are displayed for use in report design windows
- The appearance of windows and objects in them
- General preferences and database connection preferences

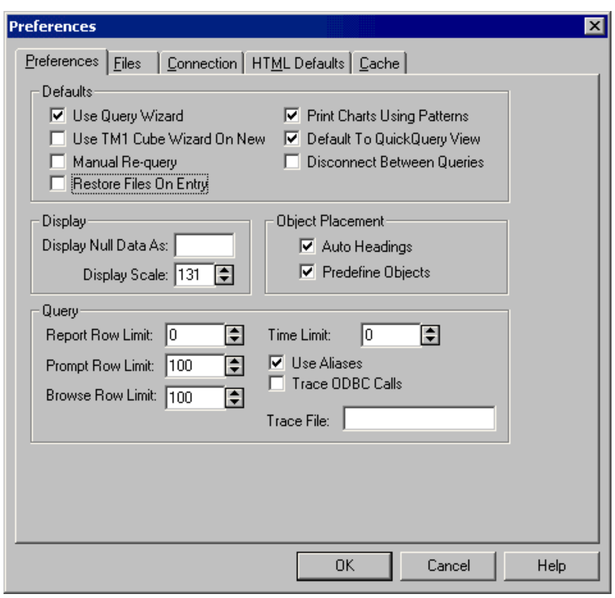
PREREQUISITES

None

STEPS TO PERFORM ACTION

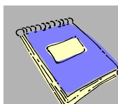
1. Open or create a FreeForm report.
2. Select **Tools** from the menu bar.
3. Select **Preferences...** from the program group.





STEP 1:

a. **Defaults Group Box:** Make any necessary changes.



NOTE:
Preferences in the Eureka dialog box are global - they apply to all documents by default unless specified.

b. **Display Group Box:** If desired, make any changes to the display.

Defaults		Display	
Use Query Wizard	This controls whether the New Document toolbar button starts the Query Wizard or whether it opens an empty new window for you to add columns and objects directly. It also controls the default for Use Query Wizard in the New Document dialog box.	**Display Null Data As**	By default, Eureka displays null values as blanks or spaces. If you want null values to be output differently, such as NULL or N/A, enter the string you want Eureka to output.
Use TM1 Cube Wizard On New	This controls whether the New Document toolbar button starts the TM1 Cube Wizard or whether it opens an empty new window for you to add columns and objects directly. It also controls the default for Create TM1 Cube in the New Document dialog box. This option is not available in DPAS.	**Display Scale**	This controls the scaling of objects in FreeForm windows and output windows. Eureka always attempts to display objects at actual size. To compensate for some video drivers for your monitor, you might need to adjust the scale up or down. Values less than 131 reduce the size of objects displayed while values greater than 131 increase the scale. Values smaller than zero or extremely large will probably cause problems. The value of 131 is the default.
Manual Re-query	This should be used if you do not want Eureka to re-query your database automatically every time you add another column while working in QuickQuery window.		
Restore File On Entry	This controls what Eureka does when it starts up. When this option is active, Eureka opens all files that were open when you last ended a Eureka session. When it is not active, your session opens a new window depending on your setting for Default to QuickQuery View.		
Print Charts Using Patterns	This will print colors in a chart as patterns when printing to a non-color printer.		
Default To Quick-Query View	This controls whether the New Document dialog box defaults to QuickQuery or FreeForm as the window type to open for a new design document. It also controls whether the New Document toolbar button creates/opens a FreeForm window or a QuickQuery window.		
Discon-nect Between Queries	This causes Eureka to disconnect from your database after each query. This may make each query after the first one in a session take a little longer to get started, but may be necessary if your database allows only a limited number of connections. This is not typically necessary with DPAS.		

c. **Object Placement Group Box:** If desired, change the Object Placement preferences.
d. **Query Group Box:** If desired, change the Query preferences.

Object Placement		Query	
Auto Headings	This causes Eureka to automatically add column headings to your document as you add column objects in FreeForm windows. It adds a text object to your page heading area(s) each time you add an object (text, column, custom, and system). The heading text is the object label that can be changed in the object's attribute dialog box.	**Report Row Limit**	Acts as a global default for limiting the number of rows Eureka gets from DPAS. Use zero to indicate that no row limit is to be set for your document (zero is the default).
Predefined Objects	This causes Eureka to open the object attributes dialog box for each new object as you place it on your document. This makes the process of defining the object and places the object as a single action. This option applies to text, child data, column, custom, user prompt, and system objects.	**Time Limit**	Acts as a global default for the time limit for query processing. Use zero to indicate that no time limit is to be set. However, DPAS has a time limit on inactivity of 45 minutes.
		Prompt Row Limit	This controls how many rows (values) are retrieved from the database when a dynamic choice list is generated for a user prompt.
		Use Aliases	This controls whether an alias reference should be used for all tables queried. DPAS uses aliases, so this option should remain turned on.
		Trace ODBC Calls	You can use ODBC call tracing to provide a log of ODBC calls and the result of each. This may allow you to determine the cause for any database access problems you may have.
		Browse Row Limit	This controls how many rows (values) are retrieved from the database when you select the Browse button in an object directory or object source.
		Trace File	This is the name of the file to which to log database calls. This should be left blank.

e. Click **OK**.

Getting Oriented With The QuickQuery Window

INTRODUCTION

In this Chapter we will begin producing reports and queries using the QuickQuery process. You will see a window and toolbars that may be new to you. This lesson will familiarize you with the terminology and function of the *Eureka* QuickQuery window environment.

OBJECTIVES

The student will be able to identify the parts and explain the functions of the QuickQuery window and the associated toolbars.

APPLICATION

Understanding the QuickQuery window and associated toolbars is necessary for you to further your understanding of the QuickQuery process.

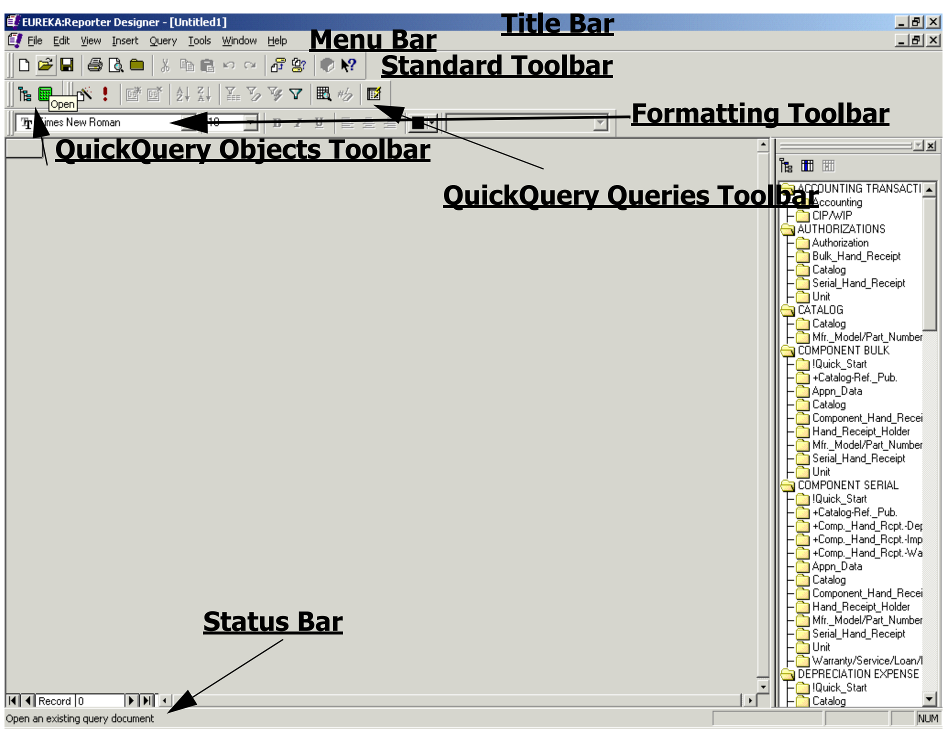
PREREQUISITES

Eureka Reporter Designer is correctly loaded and configured.

ACTIVITY

Instructor-led lecture

This is an example of a QuickQuery Window:



Opening A New QuickQuery Report

INTRODUCTION

QuickQuery is a fast, interactive way to shape your query/report while viewing the data it returns in a spreadsheet-like layout. QuickQuery is an excellent tool if your intention is to create a query for yourself in order to answer a question, or to prepare a report that is to convey information, but will be used internally by you and your organization. It is the easiest and most structured method to develop that information.

OBJECTIVES

To create a query/report using the QuickQuery function both with and without the QuickQuery Wizard.

APPLICATION

You need to create a basic report quickly. You do not need anything fancy or complex. For example, you are asked to provide a list of items on your property book that are under the $5000 minor property threshold.

PREREQUISITES

Eureka Reporter Designer is appropriately loaded and configured.

ACTIVITY

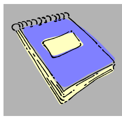
Instructor-led demonstration

STEPS TO PERFORM ACTION

1. While in DPAS, select the **Ad Hoc Reports** icon, or select **Ad Hoc** from the menu bar.
2. Select ***Eureka*** from the program group.

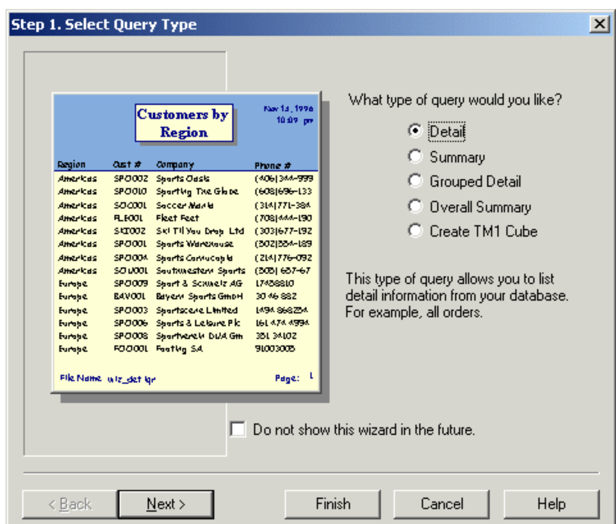
-OR-

3. From you computer desktop, double-click the ***Eureka*** **Reporter Designer** icon.



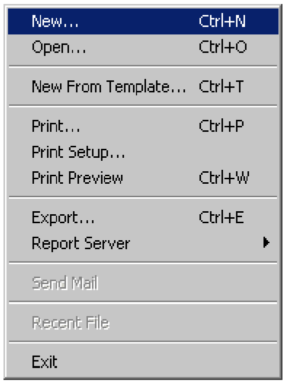
NOTE:
If you do not have a shortcut to *Eureka* on your desktop, then click **Start>Programs>** ***Eureka*** **Reporter Designer.**

The Query Wizard will display:



4. Click **Finish** if you do not want to use the Query Wizard. This will take you into QuickQuery.

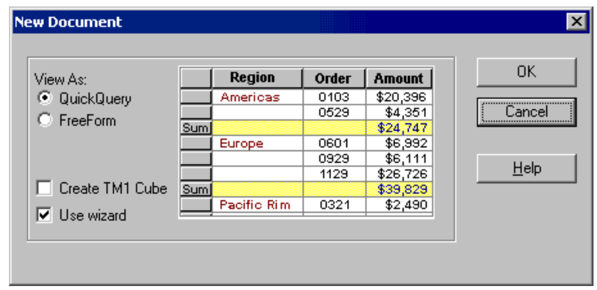
If you are already in QuickQuery and you want to open a new report:



STEP 1:

a. Select **File** from the menu bar.
b. Select **New...** from the program group.

STEP 2:



a. **View As:** The default is **QuickQuery**. If you want to create a report in **FreeForm**, select that radio button.
b. **Create TM1 Cube:** **NEVER** select this check box; DPAS does not support this.
c. **Use Wizard:** If you want to create a new Quick-Query or FreeForm report using the Wizard, then leave this box checked; otherwise, uncheck it.
d. Click **OK**.

Building A QuickQuery With The Query Wizard

INTRODUCTION

This section outlines building QuickQuery reports by using the Query Wizard. The query wizard is the easier way to create a query and takes you step-by-step through:

- **STEP 1:** Select Query Type
- **STEP 2:** Select Columns
- **STEP 3:** Setting Column Filters
- **STEP 4:** Select Columns to Sort By
- **STEP 5:** Select Columns to Aggregate
- **STEP 6:** Select QuickQuery Style Profile

Using the query wizard produces a spreadsheet-type report or query.

OBJECTIVES

Using the QuickQuery Wizard, you will develop a spreadsheet-type of report with columns of data (detail) that have been filtered, sorted, and aggregated (totaled for the column). You will present a sample page of this finished report to your instructor.

APPLICATION

This type of query can be used when you need a simple report fast. For example, you want to build a simple report that displays certain data fields for your Hand Receipt Holders.

PREREQUISITES

Eureka Reporter Designer is appropriately loaded and configured.

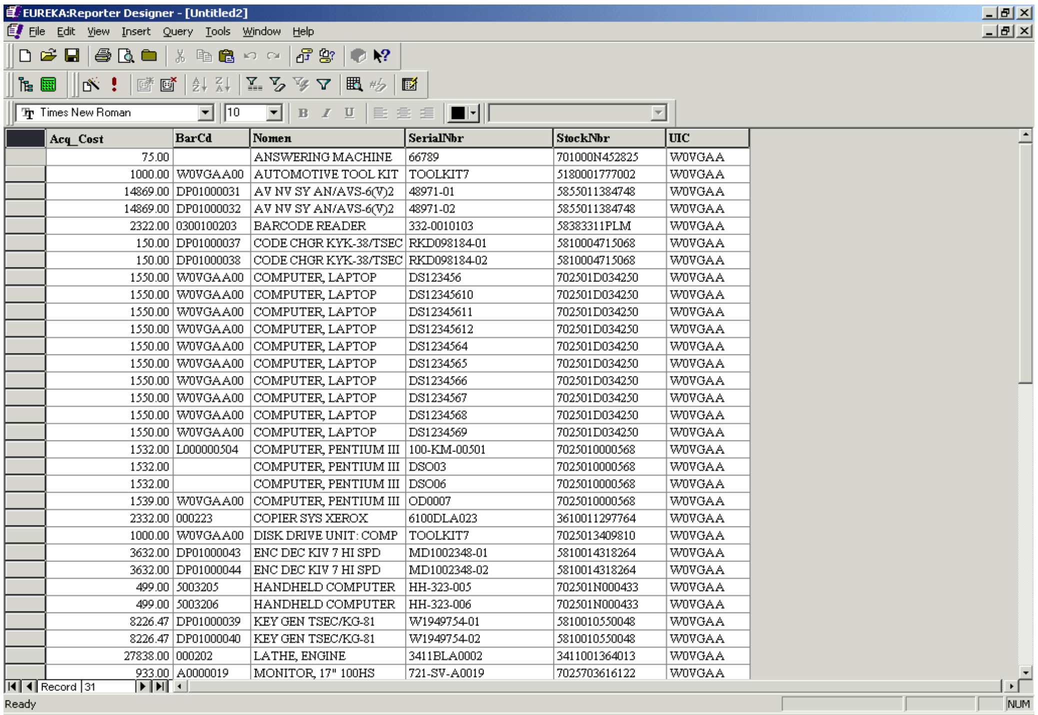
ACTIVITY

Instructor-led demonstration

REPORT TYPE

A complete asset listing by UIC/Major Hand Receipt Holder showing stock number, bar code, nomenclature, and acquisition cost of each asset.

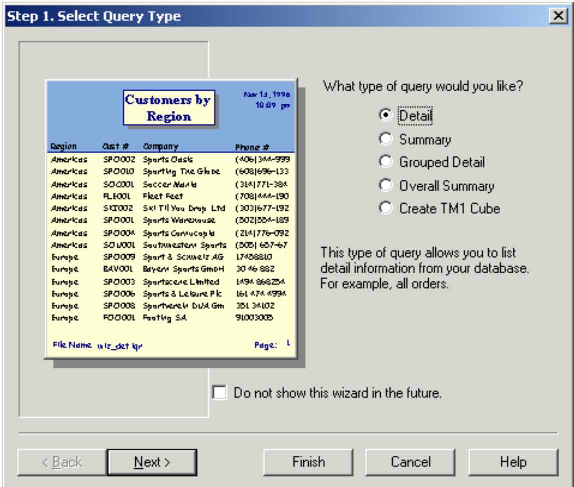
This is a sample of a QuickQuery report that will be built in this demonstration:



Acq_Cost	BarCd	Nomen	SerialNbr	StockNbr	UIC
75.00		ANSWERING MACHINE	66789	701000N452825	W0VGAA
1000.00	W0VGAA00	AUTOMOTIVE TOOL KIT	TOOLKIT7	5180001777002	W0VGAA
14869.00	DP01000031	AV NV SY AN/AVS-6(V)2	48971-01	5855011384748	W0VGAA
14869.00	DP01000032	AV NV SY AN/AVS-6(V)2	48971-02	5855011384748	W0VGAA
2322.00	0300100203	BARCODE READER	332-0010103	58383311PLM	W0VGAA
150.00	DP01000037	CODE CHGR KYK-38/TSEC	RKD098184-01	5810004715068	W0VGAA
150.00	DP01000038	CODE CHGR KYK-38/TSEC	RKD098184-02	5810004715068	W0VGAA
1550.00	W0VGAA00	COMPUTER, LAPTOP	DS123456	702501D034250	W0VGAA
1550.00	W0VGAA00	COMPUTER, LAPTOP	DS12345610	702501D034250	W0VGAA
1550.00	W0VGAA00	COMPUTER, LAPTOP	DS12345611	702501D034250	W0VGAA
1550.00	W0VGAA00	COMPUTER, LAPTOP	DS12345612	702501D034250	W0VGAA
1550.00	W0VGAA00	COMPUTER, LAPTOP	DS1234564	702501D034250	W0VGAA
1550.00	W0VGAA00	COMPUTER, LAPTOP	DS1234565	702501D034250	W0VGAA
1550.00	W0VGAA00	COMPUTER, LAPTOP	DS1234566	702501D034250	W0VGAA
1550.00	W0VGAA00	COMPUTER, LAPTOP	DS1234567	702501D034250	W0VGAA
1550.00	W0VGAA00	COMPUTER, LAPTOP	DS1234568	702501D034250	W0VGAA
1550.00	W0VGAA00	COMPUTER, LAPTOP	DS1234569	702501D034250	W0VGAA
1532.00	L000000504	COMPUTER, PENTIUM III	100-KM-00501	7025010000568	W0VGAA
1532.00		COMPUTER, PENTIUM III	DSO03	7025010000568	W0VGAA
1532.00		COMPUTER, PENTIUM III	DSO06	7025010000568	W0VGAA
1539.00	W0VGAA00	COMPUTER, PENTIUM III	OD0007	7025010000568	W0VGAA
2332.00	000223	COPIER SYS XEROX	6100DLA023	3610011297764	W0VGAA
1000.00	W0VGAA00	DISK DRIVE UNIT: COMP	TOOLKIT7	7025013409810	W0VGAA
3632.00	DP01000043	ENC DEC KIV 7 HI SPD	MD1002348-01	5810014318264	W0VGAA
3632.00	DP01000044	ENC DEC KIV 7 HI SPD	MD1002348-02	5810014318264	W0VGAA
499.00	5003205	HANDHELD COMPUTER	HH-323-005	702501N000433	W0VGAA
499.00	5003206	HANDHELD COMPUTER	HH-323-006	702501N000433	W0VGAA
8226.47	DP01000039	KEY GEN TSEC/KG-81	W1949754-01	5810010550048	W0VGAA
8226.47	DP01000040	KEY GEN TSEC/KG-81	W1949754-02	5810010550048	W0VGAA
27838.00	000202	LATHE, ENGINE	3411BLA0002	3411001364013	W0VGAA
933.00	A0000019	MONITOR, 17" 100HS	721-SV-A0019	7025703616122	W0VGAA

STEPS TO PERFORM ACTION

1. While in DPAS, select the **Ad Hoc Reports** icon, or select **Ad Hoc** from the menu bar.
2. Select ***Eureka*** from the program group.



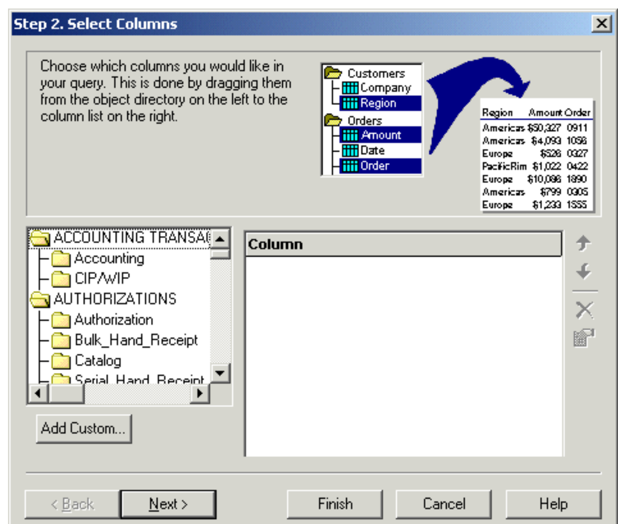
STEP 1 Select Query Type:

a. Select the type of query you would like.

Query Types	
Detail	Detail queries return detailed data without any aggregate functions applied, the aggregate functions being average, count, minimum, maximum, and sum.
Summary	Summary queries are useful when you want to summarize data for a number of different items.
Grouped Detail	Grouped detail queries let you view the query results grouped by one or more columns.
Overall Summary	Overall summary queries give the highest level view of your data.
Create TM1 Cube	This is not available.

b. Click **Next>**.

STEP 2 Select Columns:



a. From the Object Directory, select the Business View you wish to use to build your columns.

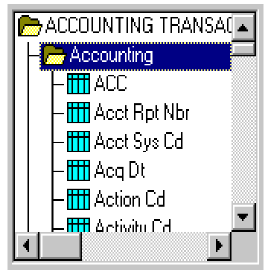
   To select the fields, you can:

   - **Double-click** each field and the field will move to the Column Window at the right.
   - **Click, drag and drop** each field to the Column Window at the right.
   - To select multiple fields, hold the **CTRL** key down and select the desired fields (**DO NOT LET UP ON THE CTRL KEY**). **Click, drag and drop** to the Column Window at the right.

b. Click **Next>**.

Eureka Object Directories

Object directories make it easy to add columns to your documents and dialog boxes. *Eureka* Reporter Designer includes an object directory in QuickQuery and Free Form windows. The main object directory can be docked or floating. You can hide and unhide it by selecting from the menu bar **View>Object Directory** or by using the **F2** key on your keyboard.



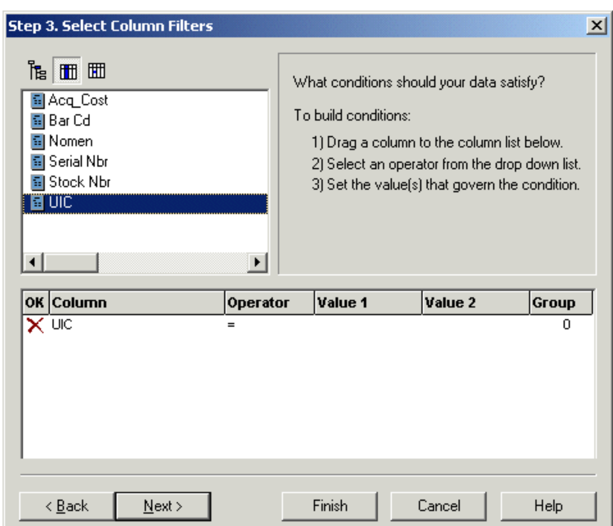
Business View. Business view names are at the top level of the tree and are indicated in **ALL CAPS**. A business view is an object in your Metadata File that corresponds to the data for a particular part of your business.

Folders. A folder can correspond to a table in your database or it can be made up of columns from more than one table. It can also include custom objects--objects that are calculated from database columns.

Data Objects. These are the actual data elements that are used to make up your report.

In this class, we will be referring to tables (pictured above) that will direct you to the Business View, Folders, and Data Elements that you will use in order to complete any activities and/or exercises.

NOTE:
You cannot select fields from 2 different Business Views (such as, **END ITEM SERIAL** and **END ITEM BULK**) on one report unless you are writing a Parent/Child report.



STEP 3A Select Column Filters:

a. From your list of selected fields, double-click or drag and drop the data field(s) you want your query to sort on.

NOTE:
Filters let you limit the data displayed to only that which meets the criteria you set. When a query has no filter, you will see **ALL** the data from your database. When you define a filter condition, you will limit the data that meets the condition. Every additional filter or filter condition you apply further narrows the view of your data

b. The default operator is equal to (=). If you want to change the default, click on the equal sign (=) and you will get a drop down list box which contains the other operators. To delete a filter condition, select it (by clicking the X or check mark under OK) and press the **DELETE** key.

Operators	Definitions
Equals (=)	When you want the result to ***equal*** the value entered.
Not Equal To (<>)	When you want the result ***not equal*** to the value entered.
Less Than (<)	When you want the result to be ***less than*** the value entered.
Less Than or Equal To (<=)	When you want the result to be ***less than or equal to*** the value entered.
Greater Than (>)	When you want the result to be ***greater than*** the value entered.
Greater Than or Equals To (>=)	When you want the result to be ***greater than or equal to*** the value entered.
Between	When you want the result to be ***between*** the range of values entered – this will *include* the values entered. Example: Bar Codes **between** 56012 and 80921.
Like	Same as =, but allows the use of wildcards. (Example: if you wanted all Stock Nbr starting with 7, the statement would be **"STOCK NBR like (operator) and 7*(value 1))."**
Not Like	Opposite of **Like**.
In	When looking for specific values in a field (example: FSC **In** 7025, 7030. This will display records with those values). **Cannot** be used with the wildcard (* or %). A comma must separate inputs (example: 15,16,170).
Not In	Opposite of **In**.
Is Null	When you want the result to ***not*** have a value. This can be done using numerical fields. No value; not even a space, can exist in a field.
Is Not Null	When you want the result to ***contain*** a value. This can only be done using numerical fields. Must have a value in the field.

c. Enter the condition that needs to be met under **Value 1**. If you are using the **Between** operator, then you will need to enter values in **Value 1** and **Value 2**.

CAUTION!
TURN YOUR CAPS LOCK ON!!!!! DPAS stores all data in uppercase.

ALL VALUES ARE CASE-SENSITIVE!!

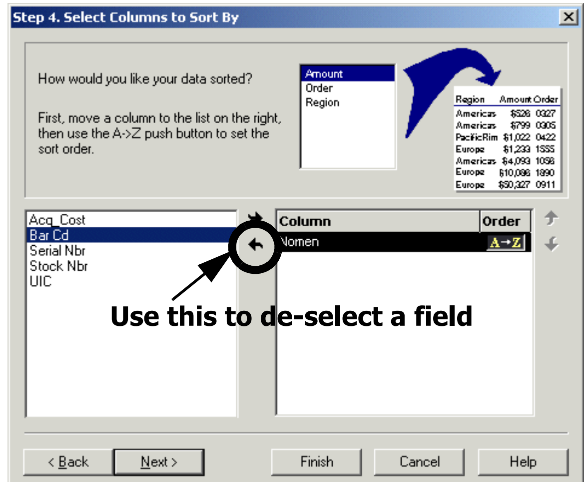
d. Click **Next>**.

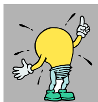
By default, all the conditions of your query are **AND** operators (i.e., all conditions have to be met before it will return your results). However, you can connect your statements with **OR** operators, which divide your statements into groups. For example, if you wanted to set your conditions by **Stock Number AND Serial Number OR Bar Code**, the **OR'd Group** would be set to 0 (zero) for Stock Number and Serial Number, and set to 1 for Bar Code.

The RULE is…If the **OR'd Group** numbers on any two statements are the same, those two statements are connected by the **AND** condition. If the **OR'd Group** numbers on any two statements are different; those two statements are connected by the **OR** condition.

STEP 4 Select Columns to Sort By:

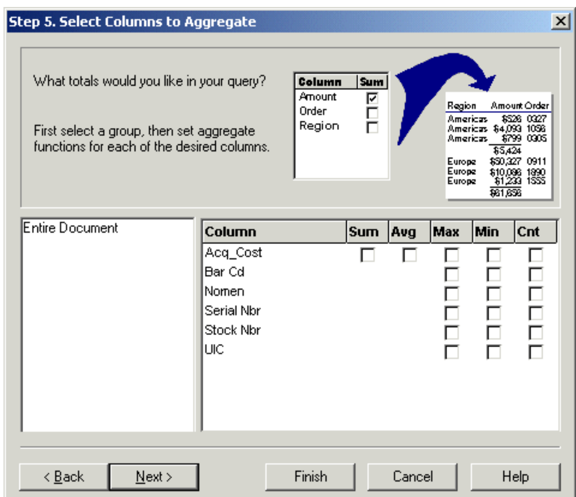
a. From your list of selected fields, double-click on the data field(s) you want your query to be sorted by. To de-select a field, highlight the field you want to de-select and click on the arrow that points to the left.





HINT!
Once you have selected your columns, you can click on **Order** button and change how you want your query to sort. For example, it would be either A-Z or Z-A.

b. Click **Next>**.



STEP 5 Select Columns to Aggregate:

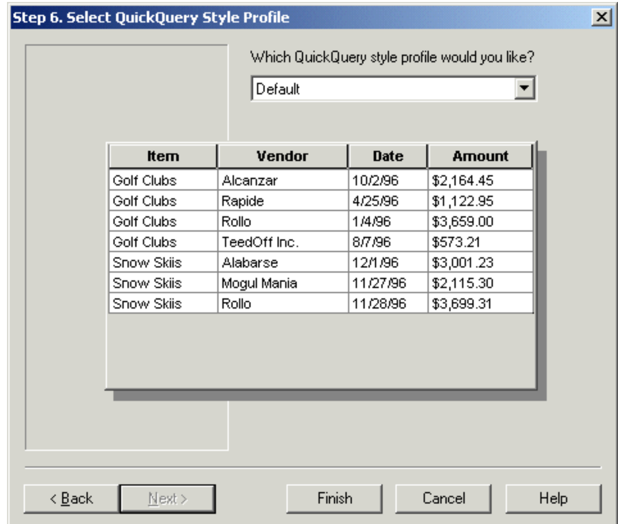
a. Click **Entire Document**. You will not be able to click any of the check boxes unless this step is performed.
b. Check the field(s) you want to total.
c. Click **Next>**.

NOTE:
Only pure numeric fields can be summed or averaged.

When using the **Count**, you will get the total number of records returned from your query.

When you are counting a data field, if you desire to get a count of ALL assets, you must count on a mandatory data field, such as Acq Cost. You would ony count on an optional field, such as Bar Cd, if you wanted to know how many bar codes you had.

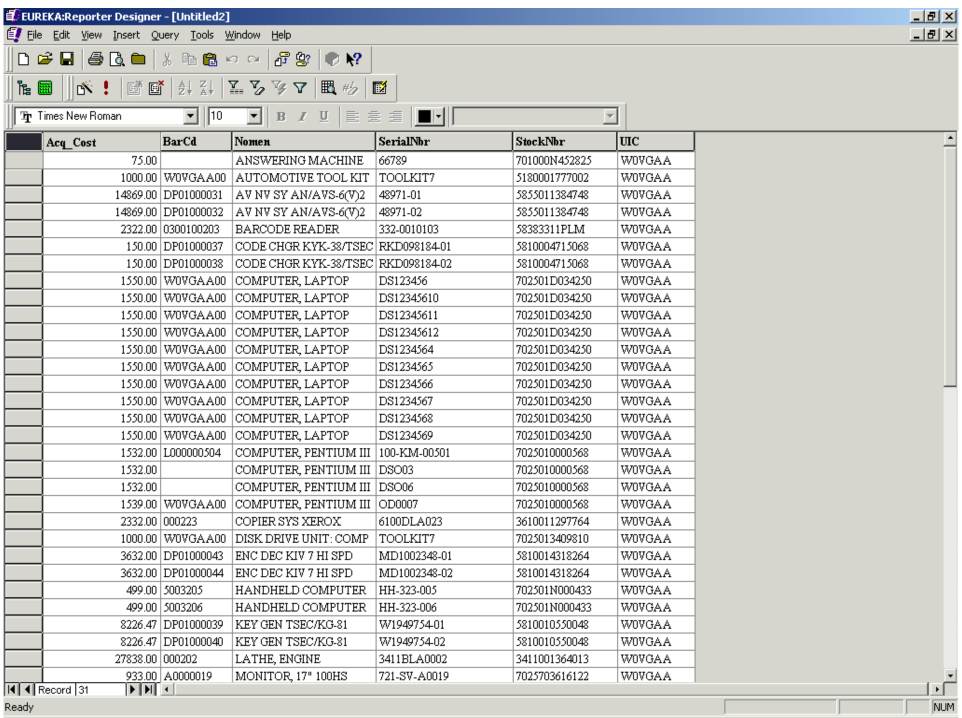
STEP 6:



This screen will allow you to choose from a style profile that was previously created.

- Click **Finish**.

Your report should look similar to the following:



Acq_Cost	BarCd	Nomen	SerialNbr	StockNbr	UIC
75.00		ANSWERING MACHINE	66789	701000N452825	W0VGAA
1000.00	W0VGAA00	AUTOMOTIVE TOOL KIT	TOOLKIT7	5180001777002	W0VGAA
14869.00	DP01000031	AV NV SY AN/AVS-6(V)2	48971-01	5855011384748	W0VGAA
14869.00	DP01000032	AV NV SY AN/AVS-6(V)2	48971-02	5855011384748	W0VGAA
2322.00	0300100203	BARCODE READER	332-0010103	58383311PLM	W0VGAA
150.00	DP01000037	CODE CHGR KYK-38/TSEC	RKD098184-01	5810004715068	W0VGAA
150.00	DP01000038	CODE CHGR KYK-38/TSEC	RKD098184-02	5810004715068	W0VGAA
1550.00	W0VGAA00	COMPUTER, LAPTOP	DS123456	702501D034250	W0VGAA
1550.00	W0VGAA00	COMPUTER, LAPTOP	DS12345610	702501D034250	W0VGAA
1550.00	W0VGAA00	COMPUTER, LAPTOP	DS12345611	702501D034250	W0VGAA
1550.00	W0VGAA00	COMPUTER, LAPTOP	DS12345612	702501D034250	W0VGAA
1550.00	W0VGAA00	COMPUTER, LAPTOP	DS1234564	702501D034250	W0VGAA
1550.00	W0VGAA00	COMPUTER, LAPTOP	DS1234565	702501D034250	W0VGAA
1550.00	W0VGAA00	COMPUTER, LAPTOP	DS1234566	702501D034250	W0VGAA
1550.00	W0VGAA00	COMPUTER, LAPTOP	DS1234567	702501D034250	W0VGAA
1550.00	W0VGAA00	COMPUTER, LAPTOP	DS1234568	702501D034250	W0VGAA
1550.00	W0VGAA00	COMPUTER, LAPTOP	DS1234569	702501D034250	W0VGAA
1532.00	L000000504	COMPUTER, PENTIUM III	100-KM-00501	7025010000568	W0VGAA
1532.00		COMPUTER, PENTIUM III	DSO03	7025010000568	W0VGAA
1532.00		COMPUTER, PENTIUM III	DSO06	7025010000568	W0VGAA
1539.00	W0VGAA00	COMPUTER, PENTIUM III	OD0007	7025010000568	W0VGAA
2332.00	000223	COPIER SYS XEROX	6100DLA023	3610011297764	W0VGAA
1000.00	W0VGAA00	DISK DRIVE UNIT: COMP	TOOLKIT7	7025013409810	W0VGAA
3632.00	DP01000043	ENC DEC KIV 7 HI SPD	MD1002348-01	5810014318264	W0VGAA
3632.00	DP01000044	ENC DEC KIV 7 HI SPD	MD1002348-02	5810014318264	W0VGAA
499.00	5003205	HANDHELD COMPUTER	HH-323-005	702501N000433	W0VGAA
499.00	5003206	HANDHELD COMPUTER	HH-323-006	702501N000433	W0VGAA
8226.47	DP01000039	KEY GEN TSEC/KG-81	W1949754-01	5810010550048	W0VGAA
8226.47	DP01000040	KEY GEN TSEC/KG-81	W1949754-02	5810010550048	W0VGAA
27838.00	000202	LATHE, ENGINE	3411BLA0002	3411001364013	W0VGAA
933.00	A0000019	MONITOR, 17" 100HS	721-SV-A0019	7025703616122	W0VGAA

Saving Your Query

INTRODUCTION

When you have created a file, which is useful, you might want to save that file to use the format again. By using the Save command, you can save the active window to a new or the same name. By using the Save As command, you can save the active report to a new name.

OBJECTIVES

Use **Save** and **Save As** to create and update your files.

APPLICATION

Self-explanatory

PREREQUISITES

Eureka Reporter Designer is appropriately loaded and configured.

Understand the layout of DPAS file structure, and complete the Orientation section of this manual.

ACTIVITY

Instructor-led demonstration.

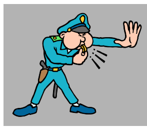
STEPS TO PERFORM ACTION

1. Select **File** from the menu bar.
2. Select  or select **Save...** from the program group.

NOTE:
There are two ways to save your query. You can save the design (report format) or the output (data).

If you save the design, this will allow you to update and rerun your query at a later time. If you save the output, then you are essentially saving the data and it cannot be updated.

Printing Your Query



CAUTION!!
Before you print your report, you will need to click the last page button to ensure that **ALL** pages of your report are printed.

INTRODUCTION

If you want a hard copy printout of your query, you will need to use the print function. *Eureka* uses the Windows common dialog box, the same as any other Windows-based product.

OBJECTIVES

To learn how to, and to print out a copy of a *Eureka* report.

APPLICATION

Self-explanatory

PREREQUISITES

Eureka Reporter Designer is appropriately loaded and configured.

Understand the layout of DPAS file structure, and complete the Orientation section of this manual.

ACTIVITY

Instructor-led demonstration

STEPS TO PERFORM ACTION

1. Open or create a QuickQuery.
2. Select **File** from the menu bar.
3. Select **Print...** from the program group.

-OR-

4. Select the print icon .

NOTE:
If you want to review the output of your query before you print it, you can do this 2 ways:

- Select **File** from the menu bar.
- Select **Print Preview** from the program group.

-OR-

- Select the print preview icon .

You can use the **Print Setup** to change the printer, print orientation, and paper and source.

Activity: QuickQuery With The Query Wizard

Student Hands-On With Instructor Direction

Unit of Study: QuickQuery (with the Wizard)

Application: This type of query can be used when you need a simple report fast.

Report Type: This is a report by your UIC listing by Stock Number, Bar Code, and Nomen. This report will also list the Acquisition Cost for each asset and give you the total sum of the assets.

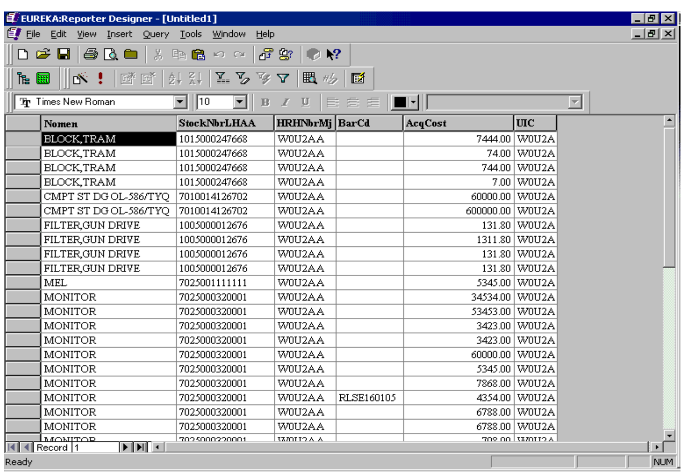
Instructions:

STEP 1: Detail
STEP 2: Select the following fields for your QuickQuery Wizard report:

BUSINESS VIEW: END ITEM SERIAL		
FOLDER(S)	**DATA ELEMENT(S)**	
!Quick_Start	Acq Cost Bar Cd HRH Nbr Mjr	Nomen Stock Nbr UIC

STEP 3: Filter by the **UIC** given to you by your instructor.
STEP 4: Sort by the **Nomen** field.
STEP 5A: Click on **Entire Document**.
STEP 5B: Set the Columns to Aggregate to **sum** for the **Acq Cost**.
STEP 6: Select **Finish** to process your report.

Example of Finished report:



Nomen	StockNbrLHAA	HRHNbrMj	BarCd	AcqCost	UIC
BLOCK,TRAM	1015000247668	W0U2AA		7444.00	W0U2A
BLOCK,TRAM	1015000247668	W0U2AA		74.00	W0U2A
BLOCK,TRAM	1015000247668	W0U2AA		744.00	W0U2A
BLOCK,TRAM	1015000247668	W0U2AA		7.00	W0U2A
CMPT ST DG OL-586/TYQ	7010014126702	W0U2AA		60000.00	W0U2A
CMPT ST DG OL-586/TYQ	7010014126702	W0U2AA		600000.00	W0U2A
FILTER,GUN DRIVE	1005000012676	W0U2AA		131.80	W0U2A
FILTER,GUN DRIVE	1005000012676	W0U2AA		1311.80	W0U2A
FILTER,GUN DRIVE	1005000012676	W0U2AA		131.80	W0U2A
FILTER,GUN DRIVE	1005000012676	W0U2AA		131.80	W0U2A
MEL	7025001111111	W0U2AA		5345.00	W0U2A
MONITOR	7025000320001	W0U2AA		34534.00	W0U2A
MONITOR	7025000320001	W0U2AA		53453.00	W0U2A
MONITOR	7025000320001	W0U2AA		3423.00	W0U2A
MONITOR	7025000320001	W0U2AA		3423.00	W0U2A
MONITOR	7025000320001	W0U2AA		60000.00	W0U2A
MONITOR	7025000320001	W0U2AA		5345.00	W0U2A
MONITOR	7025000320001	W0U2AA		7868.00	W0U2A
MONITOR	7025000320001	W0U2AA	RLSE160105	4354.00	W0U2A
MONITOR	7025000320001	W0U2AA		6788.00	W0U2A
MONITOR	7025000320001	W0U2AA		6788.00	W0U2A

Skill Builder: QuickQuery With The Query Wizard

Objectives: You will:

- **Review Building a QuickQuery With The Query Wizard (Word Exercise)**
- **Discussion Questions**
- **Practical Exercise to build a QuickQuery with the Query Wizard**

Complete the following exercise:

1. Name the type of queries you can select when building a QuickQuery with the Query Wizard?

   a. ______________________________ c. ______________________________

   b. ______________________________ d. ______________________________

2. List the 6 steps of the Query Wizard (in order).

   a. ______________________________ d. ______________________________

   b. ______________________________ e. ______________________________

   c. ______________________________ f. ______________________________

3. The ____________ ___________ contains the business views, folders and data fields for building your report.

4. All values entered in Eureka are case sensitive. **(True or False)**

   True _______ False _______

5. List five types of operators.

   a. ______________________________ d. ______________________________

   b. ______________________________ e. ______________________________

   c. ______________________________

6. What is a structured pathway for a new user to build a report?

____

7. In Step 5 **Select Columns to Aggregate** name 3 aggregate functions you can perform.

a. ______________________________ c. ________________________________

b. ______________________________

8. When working with QuickQuery, you can only work in one business view at one time? **(True or False)**

True _______ False _______

Discussion Questions:

1. **Review the use of the Business Views and Folders.**
2. **Why is it important to use the filter function in some reports?**
3. **Discuss the different types of queries and what would be an example of how you would use them.**

Practical Exercise: QuickQuery With The Query Wizard

Independent Student Report

Unit of Study: Building a QuickQuery With The Query Wizard

Application: This type of query can be used when you need a simple report fast.

Report Type: Accounting report, filtered by UIC displaying serial number, stock number, fund code and dollar amount with sum and average.

Instructions:

1. Create a new report using the QuickQuery Wizard.
2. Select the following fields for your QuickQuery Wizard report:

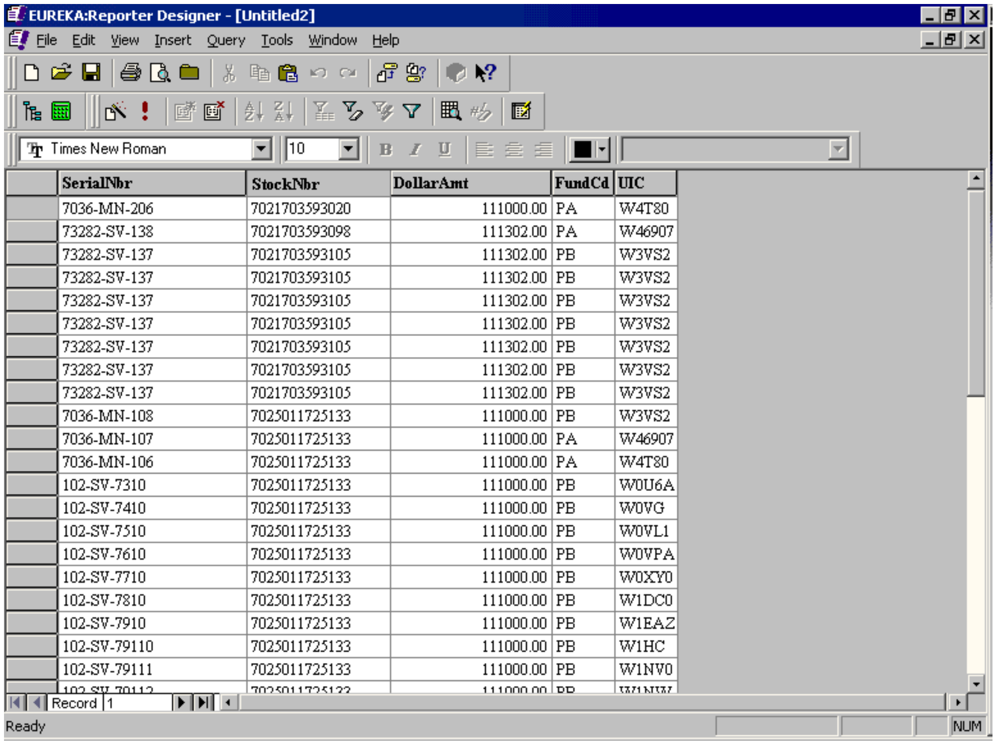
BUSINESS VIEW: ACCOUNTING TRANSACTIONS		
FOLDER(S)	**DATA ELEMENT(S)**	
Accounting	Serial Nbr Stock Nbr Dollar Amt	Fund Cd UIC

3. **Filter:**

   Column: UIC
   Operator: Like
   Value1: W*
4. **Sort:** Stock Nbr
5. Click on **Entire Document**.
6. **Aggregate:** Dollar Amt using **Sum** and **Average**

HINT!
For your Filter: Remember to use the value of "**like**" because we are using the wildcard to look for UICs that begin with **"W"**. Refer to the list of operators on page C7-28.

Example of the finished report:



SerialNbr	StockNbr	DollarAmt	FundCd	UIC
7036-MN-206	7021703593020	111000.00	PA	W4T80
73282-SV-138	7021703593098	111302.00	PA	W46907
73282-SV-137	7021703593105	111302.00	PB	W3VS2
73282-SV-137	7021703593105	111302.00	PB	W3VS2
73282-SV-137	7021703593105	111302.00	PB	W3VS2
73282-SV-137	7021703593105	111302.00	PB	W3VS2
73282-SV-137	7021703593105	111302.00	PB	W3VS2
73282-SV-137	7021703593105	111302.00	PB	W3VS2
73282-SV-137	7021703593105	111302.00	PB	W3VS2
7036-MN-108	7025011725133	111000.00	PB	W3VS2
7036-MN-107	7025011725133	111000.00	PA	W46907
7036-MN-106	7025011725133	111000.00	PA	W4T80
102-SV-7310	7025011725133	111000.00	PB	W0U6A
102-SV-7410	7025011725133	111000.00	PB	W0VG
102-SV-7510	7025011725133	111000.00	PB	W0VL1
102-SV-7610	7025011725133	111000.00	PB	W0VPA
102-SV-7710	7025011725133	111000.00	PB	W0XY0
102-SV-7810	7025011725133	111000.00	PB	W1DC0
102-SV-7910	7025011725133	111000.00	PB	W1EAZ
102-SV-79110	7025011725133	111000.00	PB	W1HC
102-SV-79111	7025011725133	111000.00	PB	W1NV0

Building A QuickQuery Without The Query Wizard

INTRODUCTION

This section outlines building a QuickQuery report without using the query wizard.

OBJECTIVES

Learn how to build a QuickQuery without the Wizard to include functions and processes that could be used in any QuickQuery that you build.

APPLICATION

This type of query can be used to generate simple reports "on the fly" without having to use the query wizard. For example, you could create a listing of all your hand receipt holders by UIC, stock number and acquisition cost. In this report we will be using different functions to manipulate our data.

REPORT TYPE

A listing of all your HRH Nbrs by UIC displaying nomenclature, stock number and acquisition cost. We will use different functions to practice manipulating the data.

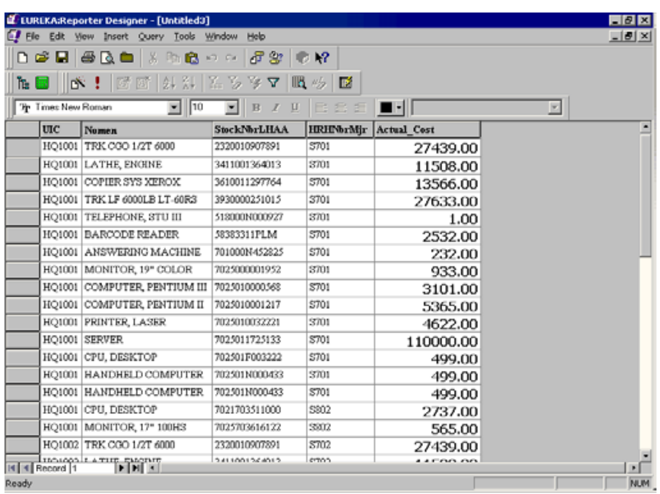
PREREQUISITES

Eureka Reporter Designer is accurately loaded and configured on your system.

ACTIVITY

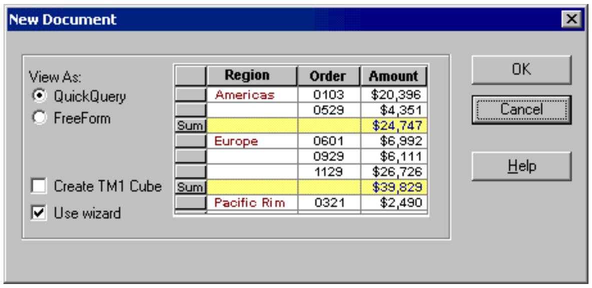
Instructor-led demonstration

Example of the finished report:



STEPS TO PERFORM ACTION

1. While in DPAS, select the **Ad Hoc Reports** icon, or select **Ad Hoc** from the menu bar.
2. Select ***Eureka*** from the program group.
3. If the Wizard is displayed, click **Finish**.
4. Select **New** from the file menu.

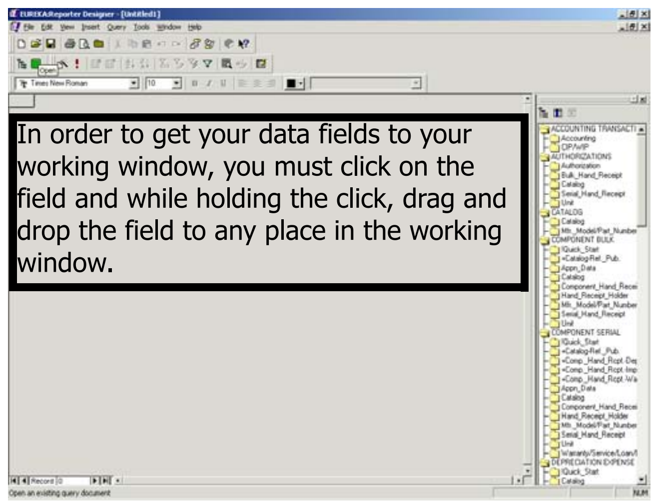


STEP 1:

a. Uncheck the **Use Wizard** choice on the new document dialog box.
b. Click **OK**.

STEP 2:

a. Depress the **F2 Key** on your keyboard to display your Object Directory (if it isn't already displayed).
b. Use the scroll bars to select the appropriate Business View from which you will select the columns you want displayed on your report.



HINTS!

It may be a good idea to change your Preferences to do a **Manual Re-Query**. See page C7-15, **Setting Preferences**, for more information.

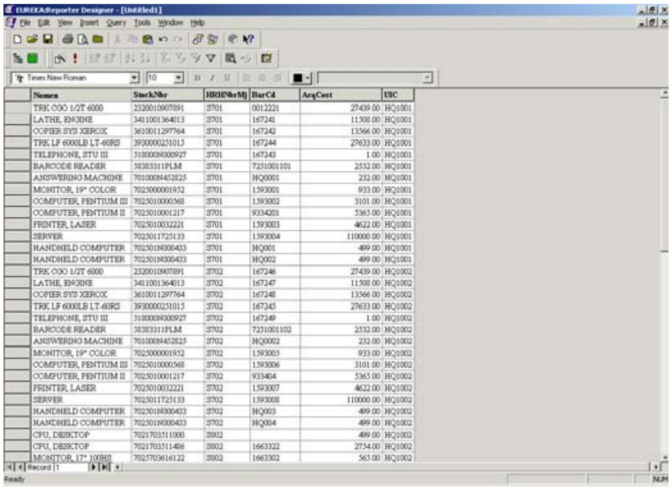
To select **MULTIPLE** fields, hold the **CTRL** key down and select the desired fields (**DO NOT LET UP ON THE CTRL KEY**). Click, "drag and drop" to any place in the working window.

c. Select the following fields for your QuickQuery report:

BUSINESS VIEW: END ITEM SERIAL		
FOLDER(S)	**DATA ELEMENT(S)**	
!Quick_Start	Nomen	Bar Cd
	Stock Nbr	Acq Cost
	HRH Nbr Mjr	UIC

Changing The Name Of A Column Heading

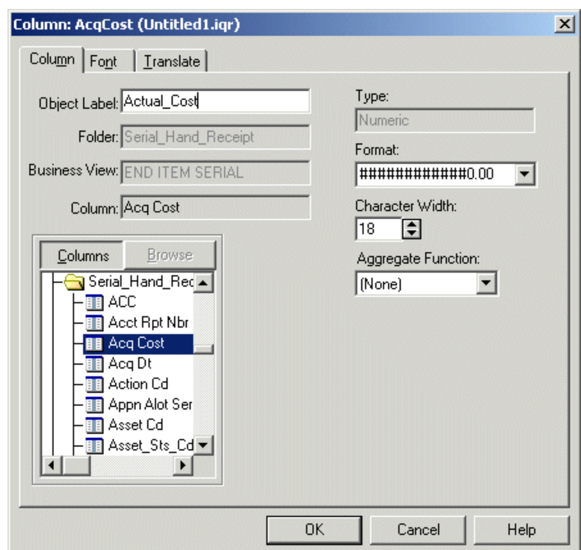
If the name of a particular column is not useful or clear to you or used by your Activity, you have the capability to change the name of that column heading.



STEP 1:

- **Double-click** on the column heading you wish to change. In this exercise, we will change the **Acq Cost** field.

STEP 2:



a. The current name of the column is displayed. Change the Object Label to **Actual Cost**.
b. **Folder:** This displays the folder your data field was chosen from. This field cannot be changed.
c. **Business View:** This displays the Business View your data field was chosen from. This field cannot be changed.
d. **Column:** This displays the system column heading from the object directory. This field cannot be changed.

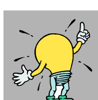
NOTE:
If your report is not working, you may want to check each of your data elements to see if they are from the same Business View. To do this, you will need to double-click on each column heading to make ensure that all data elements are from the same Business View.

e. **Type:** This field displays the characteristics of the data (string, numeric, or date).

f. **Format:** If you selected to change a cost field, you can change the format of that field. Change the Format to **Windows Currency**.

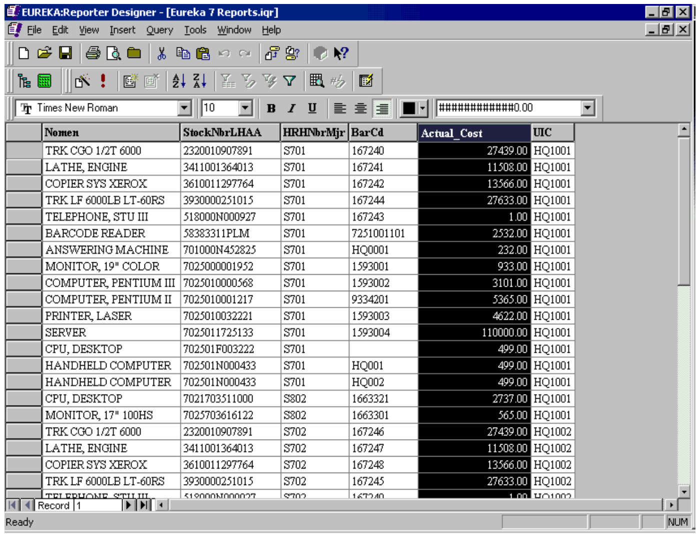
Format Functions		
FORMAT	**SAMPLE DATA VALUE**	**FORMATTED APPEARANCE**
####0.00	1234.5	1234.50
#,###.##	1234.5	1,234.5
#.##	1234.5	1234.5
#0	1234.56	1235
$#,###,##0.00	1234.5	$1,234.56
$#,##0.00	100.5 0 2500.25 -145.10	$100.50 $0.00 $2,500.25 -$145.10
$#,##0.00;($#,##0.00)	100.503 -145.10	$100.50 ($145.10)
$#,##0.00"CR";$#,##0.00	$1,234.50CR -1234.5	1234.5 $1,234.50
0[S/1000]	12375 199	12 0
dd Mmmm yyyy	Oct 1, 1966	10 October 1966
dd-MMM-yy	Oct 1, 1966	01-OCT-66
mm/dd/yy	Jan 15,1991	01/15/91
dddd	Oct 1, 1966	Saturday
hh:mm	9:43am	09:43
hh:mm AM/PM	9:43am	09:43 AM
hh:mm:ss	9:43am	09:43:00
hh:mm:ss.ssssss	09:43am	09:43:00.000000
Click on the pick list to review additional Format Functions		

g. **Charater Width:** This field defaults to the actual field length, but can be changed. Keep in mind that if you make the length shorter that the actual field length, it will truncate the field.
h. **Aggregate Function:** Select if you want to an average, count, maximum value, minimum value, or sum for your data field.



HINT!
If you select the **Sum** Aggregate Function, after you change the Format, the Format is set back to the default. Therefore, set the Aggregate Function before the Format.

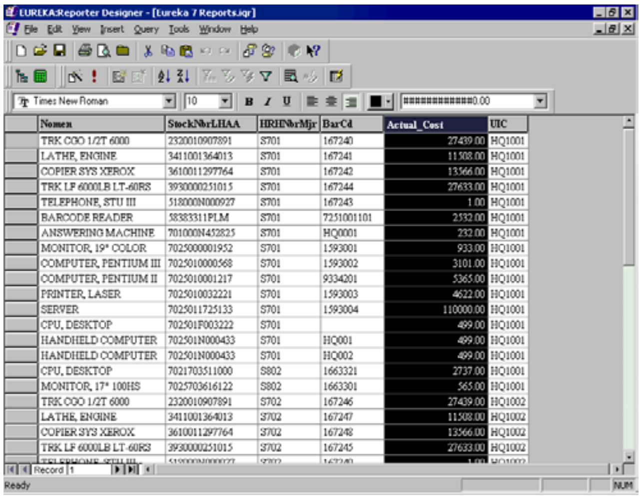
Example of the finished report:



Nomen	StockNbrLHAA	HRHNbrMjr	BarCd	Actual_Cost	UIC
TRK CGO 1/2T 6000	2320010907891	S701	167240	27439.00	HQ1001
LATHE, ENGINE	3411001364013	S701	167241	11508.00	HQ1001
COPIER SYS XEROX	3610011297764	S701	167242	13566.00	HQ1001
TRK LF 6000LB LT-60RS	3930000251015	S701	167244	27633.00	HQ1001
TELEPHONE, STU III	518000N000927	S701	167243	1.00	HQ1001
BARCODE READER	58383311PLM	S701	7251001101	2532.00	HQ1001
ANSWERING MACHINE	701000N452825	S701	HQ0001	232.00	HQ1001
MONITOR, 19" COLOR	7025000001952	S701	1593001	933.00	HQ1001
COMPUTER, PENTIUM III	7025010000568	S701	1593002	3101.00	HQ1001
COMPUTER, PENTIUM II	7025010001217	S701	9334201	5365.00	HQ1001
PRINTER, LASER	7025010032221	S701	1593003	4622.00	HQ1001
SERVER	7025011725133	S701	1593004	110000.00	HQ1001
CPU, DESKTOP	702501F003222	S701		499.00	HQ1001
HANDHELD COMPUTER	702501N000433	S701	HQ001	499.00	HQ1001
HANDHELD COMPUTER	702501N000433	S701	HQ002	499.00	HQ1001
CPU, DESKTOP	7021703511000	S802	1663321	2737.00	HQ1001
MONITOR, 17" 100HS	7025703616122	S802	1663301	565.00	HQ1001
TRK CGO 1/2T 6000	2320010907891	S702	167246	27439.00	HQ1002
LATHE, ENGINE	3411001364013	S702	167247	11508.00	HQ1002
COPIER SYS XEROX	3610011297764	S702	167248	13566.00	HQ1002
TRK LF 6000LB LT-60RS	3930000251015	S702	167245	27633.00	HQ1002

Changing The Fonts

You can change the font attributes for the column headings in your report.



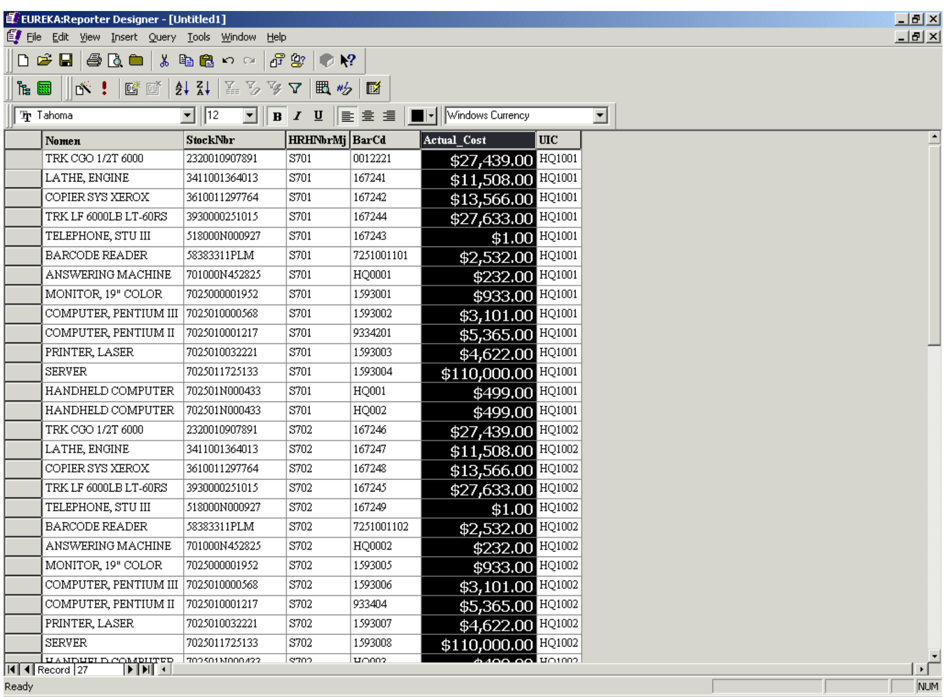
STEP:

a. **Click** on the column heading you wish to change. In this exercise, click on the **Actual_Cost** column heading.
b. Using the Formatting toolbar, change the type of font you wish to use.
c. You can also use the Formatting toolbar to change the size, alignment, style, and color of the font.

You can also double-click on the column heading. It will display the Column Dialog box for the the column you selected.

1. Click on the **Font** tab to display the font attributes.
2. Make any necessary changes. Notice that in the Sample box, a sampling will be displayed.
3. Click **OK**.

Example of the finished report:

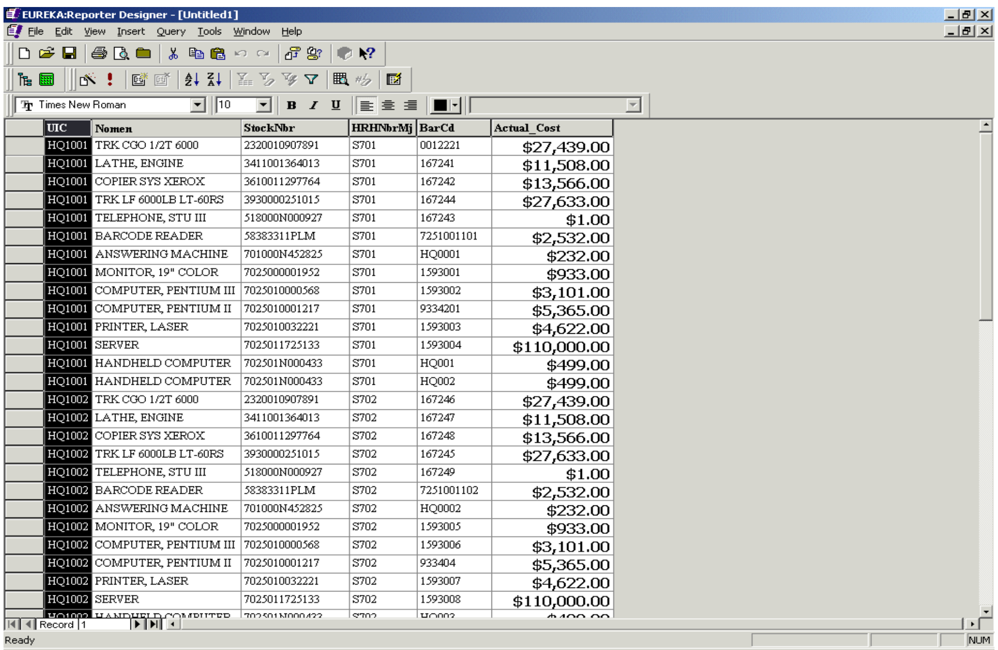


Moving Columns

If you decide that you do not like where a column is displayed in your query, you can simply move it.

1. Highlight the **UIC** column by clicking in the UIC column heading. Your cursor will change to a black arrow when you place the cursor on the heading.
2. Click and drag the column (while still holding the click) into the first position of your report. As you move across the screen, you will notice that there is a red line. Use this as a guide to where you want to position the column.
3. Once you have positioned the red line to where you want the column to be located, release the click on the mouse.

Example of the finished report:



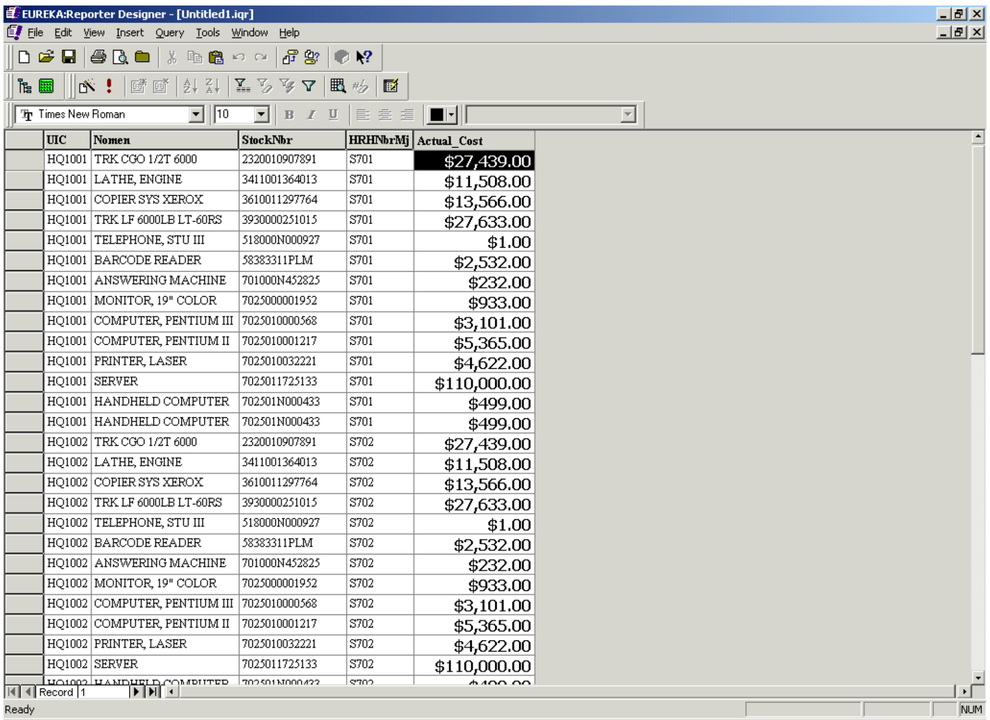
UIC	Nomen	StockNbr	HRHNbrMj	BarCd	Actual_Cost
HQ1001	TRK CGO 1/2T 6000	2320010907891	S701	0012221	$27,439.00
HQ1001	LATHE, ENGINE	3411001364013	S701	167241	$11,508.00
HQ1001	COPIER SYS XEROX	3610011297764	S701	167242	$13,566.00
HQ1001	TRK LF 6000LB LT-60RS	3930000251015	S701	167244	$27,633.00
HQ1001	TELEPHONE, STU III	518000N000927	S701	167243	$1.00
HQ1001	BARCODE READER	58383311PLM	S701	7251001101	$2,532.00
HQ1001	ANSWERING MACHINE	701000N452825	S701	HQ0001	$232.00
HQ1001	MONITOR, 19" COLOR	7025000001952	S701	1593001	$933.00
HQ1001	COMPUTER, PENTIUM III	7025010000568	S701	1593002	$3,101.00
HQ1001	COMPUTER, PENTIUM II	7025010001217	S701	9334201	$5,365.00
HQ1001	PRINTER, LASER	7025010032221	S701	1593003	$4,622.00
HQ1001	SERVER	7025011725133	S701	1593004	$110,000.00
HQ1001	HANDHELD COMPUTER	702501N000433	S701	HQ001	$499.00
HQ1001	HANDHELD COMPUTER	702501N000433	S701	HQ002	$499.00
HQ1002	TRK CGO 1/2T 6000	2320010907891	S702	167246	$27,439.00
HQ1002	LATHE, ENGINE	3411001364013	S702	167247	$11,508.00
HQ1002	COPIER SYS XEROX	3610011297764	S702	167248	$13,566.00
HQ1002	TRK LF 6000LB LT-60RS	3930000251015	S702	167245	$27,633.00
HQ1002	TELEPHONE, STU III	518000N000927	S702	167249	$1.00
HQ1002	BARCODE READER	58383311PLM	S702	7251001102	$2,532.00
HQ1002	ANSWERING MACHINE	701000N452825	S702	HQ0002	$232.00
HQ1002	MONITOR, 19" COLOR	7025000001952	S702	1593005	$933.00
HQ1002	COMPUTER, PENTIUM III	7025010000568	S702	1593006	$3,101.00
HQ1002	COMPUTER, PENTIUM II	7025010001217	S702	933404	$5,365.00
HQ1002	PRINTER, LASER	7025010032221	S702	1593007	$4,622.00
HQ1002	SERVER	7025011725133	S702	1593008	$110,000.00

Deleting Columns

If you decide that you do not want a column to be displayed in your query, you can simply delete it.

1. Highlight the **Bar Cd** by clicking once in the heading area.
2. Depress the **Delete** key on your keyboard.

Example of the finished report:



UIC	Nomen	StockNbr	HRHNbrMj	Actual_Cost
HQ1001	TRK CGO 1/2T 6000	2320010907891	S701	$27,439.00
HQ1001	LATHE, ENGINE	3411001364013	S701	$11,508.00
HQ1001	COPIER SYS XEROX	3610011297764	S701	$13,566.00
HQ1001	TRK LF 6000LB LT-60RS	3930000251015	S701	$27,633.00
HQ1001	TELEPHONE, STU III	518000N000927	S701	$1.00
HQ1001	BARCODE READER	58383311PLM	S701	$2,532.00
HQ1001	ANSWERING MACHINE	701000N452825	S701	$232.00
HQ1001	MONITOR, 19" COLOR	7025000001952	S701	$933.00
HQ1001	COMPUTER, PENTIUM III	7025010000568	S701	$3,101.00
HQ1001	COMPUTER, PENTIUM II	7025010001217	S701	$5,365.00
HQ1001	PRINTER, LASER	7025010032221	S701	$4,622.00
HQ1001	SERVER	7025011725133	S701	$110,000.00
HQ1001	HANDHELD COMPUTER	702501N000433	S701	$499.00
HQ1001	HANDHELD COMPUTER	702501N000433	S701	$499.00
HQ1002	TRK CGO 1/2T 6000	2320010907891	S702	$27,439.00
HQ1002	LATHE, ENGINE	3411001364013	S702	$11,508.00
HQ1002	COPIER SYS XEROX	3610011297764	S702	$13,566.00
HQ1002	TRK LF 6000LB LT-60RS	3930000251015	S702	$27,633.00
HQ1002	TELEPHONE, STU III	518000N000927	S702	$1.00
HQ1002	BARCODE READER	58383311PLM	S702	$2,532.00
HQ1002	ANSWERING MACHINE	701000N452825	S702	$232.00
HQ1002	MONITOR, 19" COLOR	7025000001952	S702	$933.00
HQ1002	COMPUTER, PENTIUM III	7025010000568	S702	$3,101.00
HQ1002	COMPUTER, PENTIUM II	7025010001217	S702	$5,365.00
HQ1002	PRINTER, LASER	7025010032221	S702	$4,622.00
HQ1002	SERVER	7025011725133	S702	$110,000.00

Freezing/Unfreezing Column Headings

When your query has numerous columns, it may be impossible to view them all at one time. Freezing a column(s) helps you identify the content(s) of the row(s). When you freeze a column(s), they are moved to the left-most position of your query. As you scroll to the right, the column(s) that you freeze will stay in place, but the other columns will move. Unfreezing will return your query to its original state.

1. Using the table below, add the following fields:

BUSINESS VIEW: END ITEM SERIAL	
FOLDER(S)	**DATA ELEMENT(S)**
Serial_Hand_Receipt	Serial Nbr Fund Cd Loc
Unit	Activity Name

2. Highlight the **HRH Nbr Mjr** field by clicking once in the heading area.
3. **Right-mouse** click to display the shortcut attributes menu.
4. Select **Freeze Column**.

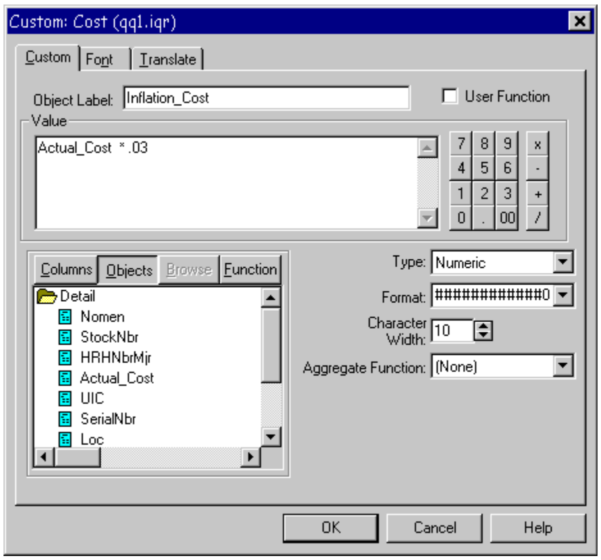
The HRH Nbr Mjr field is moved to the left-most position and there is a fine blue line separating the frozen column with the unfrozen columns.

5. Scroll to the right.

Notice how the HRH Nbr Mjr field does not move but the other fields move.

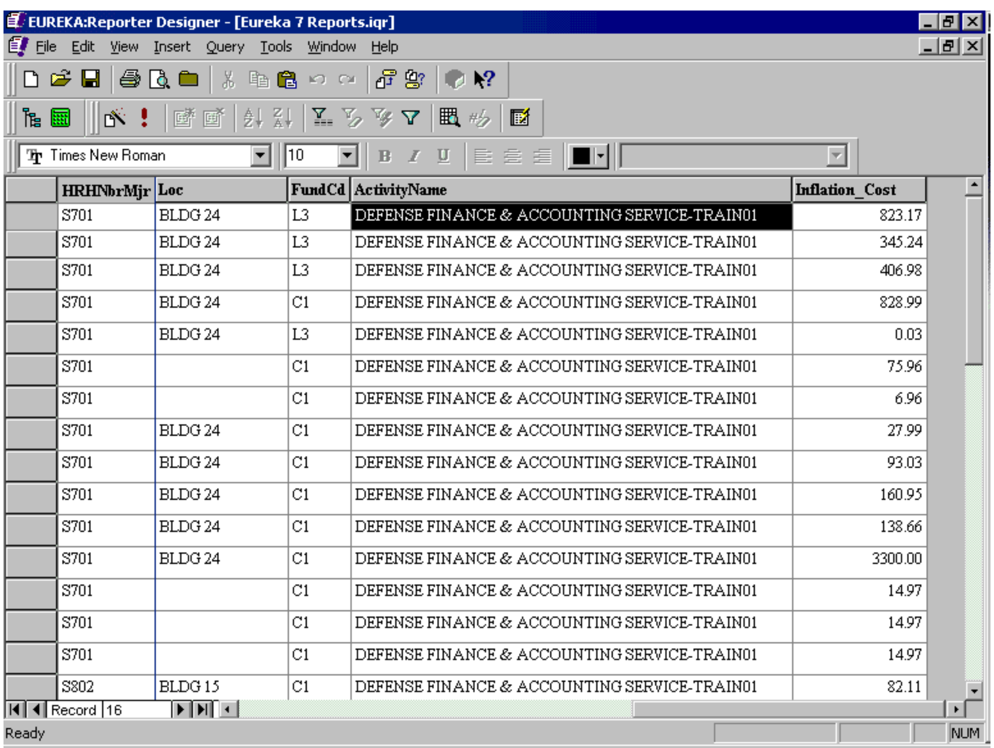
Adding Custom Columns

1. Select the custom column icon or select **Insert** from the menu bar, and then select **Custom**.
2. Enter an Object Label of your choice.



3. **User Function:** Check this box if you want to pull in calculations that are not defined by the database administrator.
4. Double-click on the Detail folder.
5. Double-click on the **Actual Cost** field. You can choose values for your custom column either by selecting the **Columns** tab (this is the Object Directory) or clicking on the **Detail** folder (these are the fields you selected for your report) or a combination of both.
6. Click on the **X** (multiply) button.
7. Enter **.03** (this is just the inflation amount). If you want the total inflated cost, the formula must be **Actual_Cost * 1.03**.

Example of the finished report:



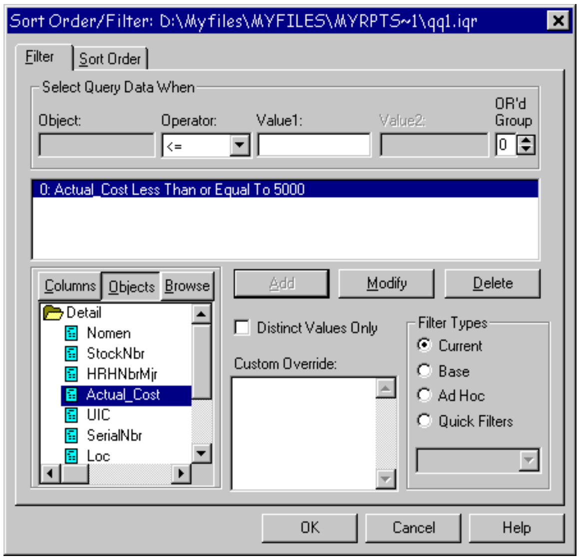
HRHNbrMjr	Loc	FundCd	ActivityName	Inflation_Cost
S701	BLDG 24	L3	DEFENSE FINANCE & ACCOUNTING SERVICE-TRAIN01	823.17
S701	BLDG 24	L3	DEFENSE FINANCE & ACCOUNTING SERVICE-TRAIN01	345.24
S701	BLDG 24	L3	DEFENSE FINANCE & ACCOUNTING SERVICE-TRAIN01	406.98
S701	BLDG 24	C1	DEFENSE FINANCE & ACCOUNTING SERVICE-TRAIN01	828.99
S701	BLDG 24	L3	DEFENSE FINANCE & ACCOUNTING SERVICE-TRAIN01	0.03
S701		C1	DEFENSE FINANCE & ACCOUNTING SERVICE-TRAIN01	75.96
S701		C1	DEFENSE FINANCE & ACCOUNTING SERVICE-TRAIN01	6.96
S701	BLDG 24	C1	DEFENSE FINANCE & ACCOUNTING SERVICE-TRAIN01	27.99
S701	BLDG 24	C1	DEFENSE FINANCE & ACCOUNTING SERVICE-TRAIN01	93.03
S701	BLDG 24	C1	DEFENSE FINANCE & ACCOUNTING SERVICE-TRAIN01	160.95
S701	BLDG 24	C1	DEFENSE FINANCE & ACCOUNTING SERVICE-TRAIN01	138.66
S701	BLDG 24	C1	DEFENSE FINANCE & ACCOUNTING SERVICE-TRAIN01	3300.00
S701		C1	DEFENSE FINANCE & ACCOUNTING SERVICE-TRAIN01	14.97
S701		C1	DEFENSE FINANCE & ACCOUNTING SERVICE-TRAIN01	14.97
S701		C1	DEFENSE FINANCE & ACCOUNTING SERVICE-TRAIN01	14.97
S802	BLDG 15	C1	DEFENSE FINANCE & ACCOUNTING SERVICE-TRAIN01	82.11

Applying Filters

Apply filter conditions to help narrow down database output so that it includes only the relevant data that you selected.

Filters are defined in the QuickQuery window using displayed values.

1. Click on the  icon.



2. Double-click on **Actual_Cost**.
3. Set the Operator to **<=** (**less than or equal to**).
4. Enter **5000** in Value1.

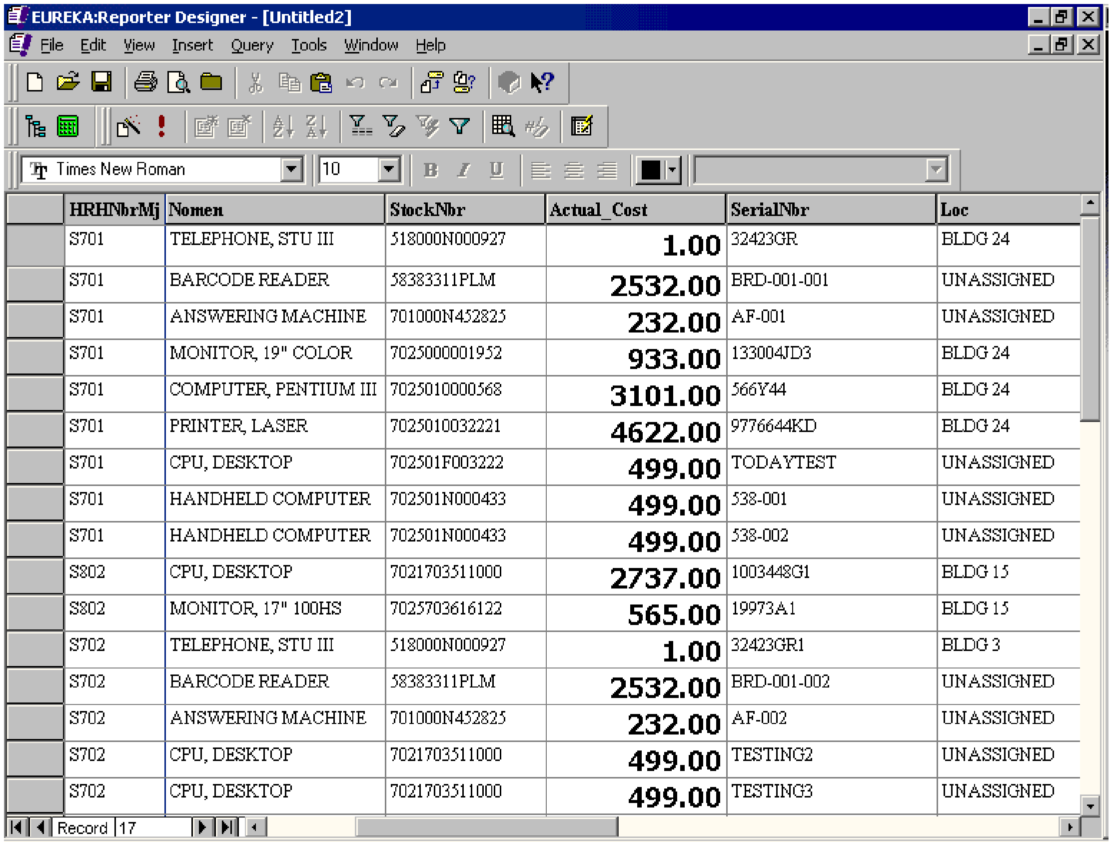
NOTE:
Remember the RULE for OR'd Group numbers on any two statements are the same, those two statements are connected by the **AND** condition. If the **OR'd Group** numbers on any two statements are different, those two statements are connected by the **OR** condition.

5. Click **Add** to activate the filter. If you have an existing filter and you need to change it, highlight the condition, change the condition and then click **Modify**. If you have an existing filter that you no longer need, highlight the condition and click **Delete**.
6. **Distinct Values Only:** Check this box when you want to eliminate any duplicate rows.
7. **Custom Override:** This displays any overriden SQL statements.

Filter Types	
Current	Displays the current filter(s) that is in effect.
Base	These are always in effect and have no conditions defined, and perform no filtering.
Ad Hoc	These are defined in the QuickQuery window using displayed values.
Quick	These are given a name and saved. These filters can only be created using the QuickQuery window.

8. Click **OK**.

Example of the finished report:



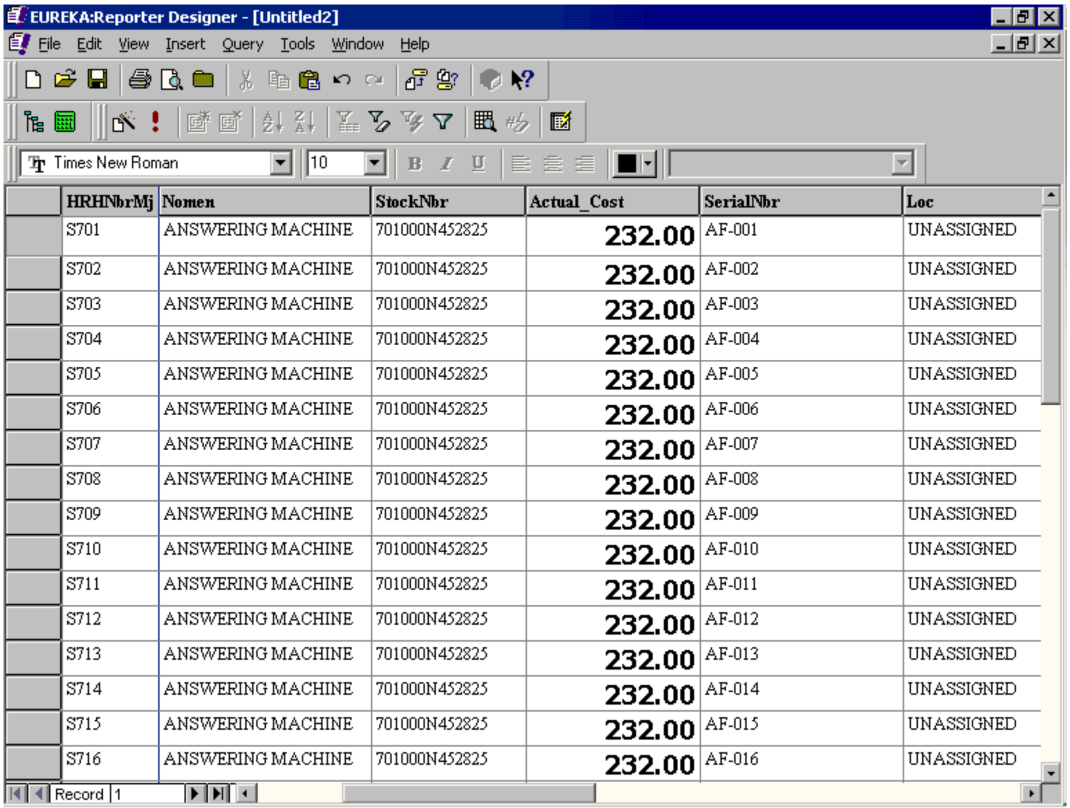
HRHNbrMj	Nomen	StockNbr	Actual_Cost	SerialNbr	Loc
S701	TELEPHONE, STU III	518000N000927	1.00	32423GR	BLDG 24
S701	BARCODE READER	58383311PLM	2532.00	BRD-001-001	UNASSIGNED
S701	ANSWERING MACHINE	701000N452825	232.00	AF-001	UNASSIGNED
S701	MONITOR, 19" COLOR	7025000001952	933.00	133004JD3	BLDG 24
S701	COMPUTER, PENTIUM III	7025010000568	3101.00	566Y44	BLDG 24
S701	PRINTER, LASER	7025010032221	4622.00	9776644KD	BLDG 24
S701	CPU, DESKTOP	702501F003222	499.00	TODAYTEST	UNASSIGNED
S701	HANDHELD COMPUTER	702501N000433	499.00	538-001	UNASSIGNED
S701	HANDHELD COMPUTER	702501N000433	499.00	538-002	UNASSIGNED
S802	CPU, DESKTOP	7021703511000	2737.00	1003448G1	BLDG 15
S802	MONITOR, 17" 100HS	7025703616122	565.00	19973A1	BLDG 15
S702	TELEPHONE, STU III	518000N000927	1.00	32423GR1	BLDG 3
S702	BARCODE READER	58383311PLM	2532.00	BRD-001-002	UNASSIGNED
S702	ANSWERING MACHINE	701000N452825	232.00	AF-002	UNASSIGNED
S702	CPU, DESKTOP	7021703511000	499.00	TESTING2	UNASSIGNED
S702	CPU, DESKTOP	7021703511000	499.00	TESTING3	UNASSIGNED

Sorting Columns

Use the **Sort** function when you want your data sorted in a particular order (ascending or descending).

1. Highlight the **Nomen** field by clicking once in the heading area.
2. Click on the (to sort in ascending order) or (to sort in descending order) from the toolbar.

Example of the finished report:



HRHNbrMj	Nomen	StockNbr	Actual_Cost	SerialNbr	Loc
S701	ANSWERING MACHINE	701000N452825	232.00	AF-001	UNASSIGNED
S702	ANSWERING MACHINE	701000N452825	232.00	AF-002	UNASSIGNED
S703	ANSWERING MACHINE	701000N452825	232.00	AF-003	UNASSIGNED
S704	ANSWERING MACHINE	701000N452825	232.00	AF-004	UNASSIGNED
S705	ANSWERING MACHINE	701000N452825	232.00	AF-005	UNASSIGNED
S706	ANSWERING MACHINE	701000N452825	232.00	AF-006	UNASSIGNED
S707	ANSWERING MACHINE	701000N452825	232.00	AF-007	UNASSIGNED
S708	ANSWERING MACHINE	701000N452825	232.00	AF-008	UNASSIGNED
S709	ANSWERING MACHINE	701000N452825	232.00	AF-009	UNASSIGNED
S710	ANSWERING MACHINE	701000N452825	232.00	AF-010	UNASSIGNED
S711	ANSWERING MACHINE	701000N452825	232.00	AF-011	UNASSIGNED
S712	ANSWERING MACHINE	701000N452825	232.00	AF-012	UNASSIGNED
S713	ANSWERING MACHINE	701000N452825	232.00	AF-013	UNASSIGNED
S714	ANSWERING MACHINE	701000N452825	232.00	AF-014	UNASSIGNED
S715	ANSWERING MACHINE	701000N452825	232.00	AF-015	UNASSIGNED
S716	ANSWERING MACHINE	701000N452825	232.00	AF-016	UNASSIGNED

Grouping/Ungrouping Columns

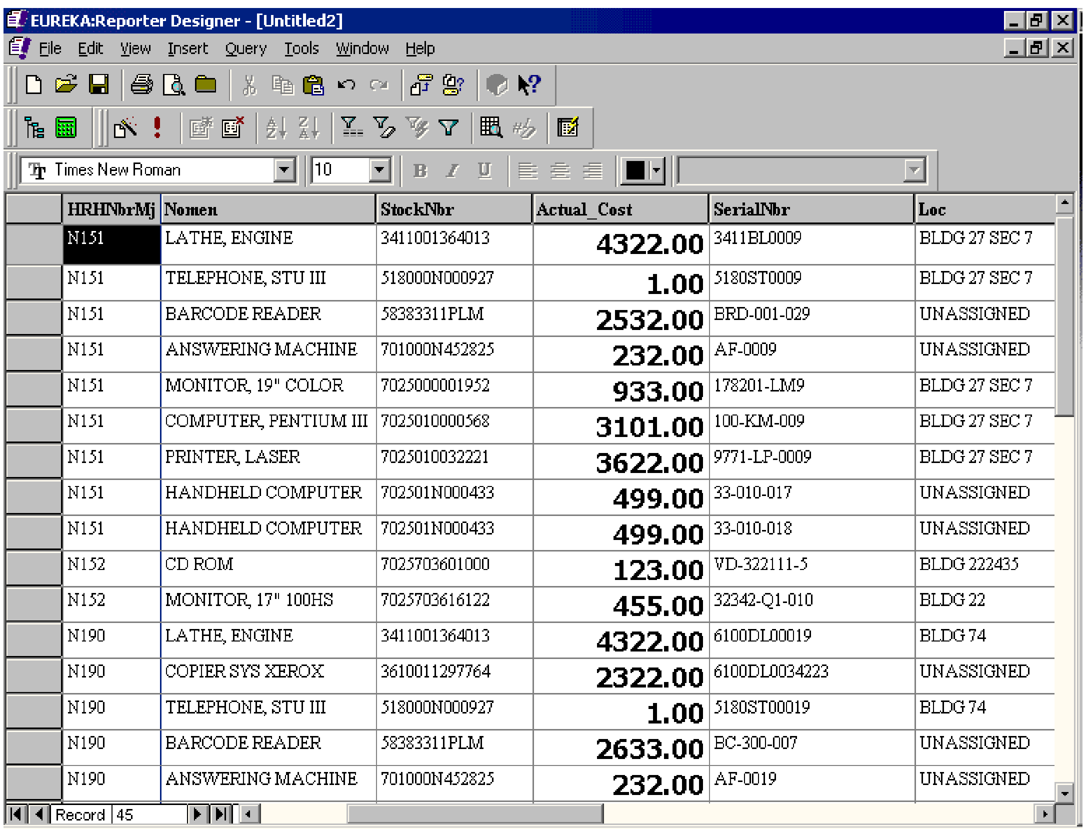
Use the **Group** function when you want your data grouped by like items.

1. Highlight the **HRH Nbr Mjr** by clicking once in the heading area.
2. **Right-mouse** click to display the shortcut attributes menu.
3. Select **Group**.

- OR -

4. Click on the button from the toolbar. (If you want to ***ungroup***, simply highlight the grouped column and click on the button.
5. Save your report as **QQGROUP**.
6. Close your report.

Example of the finished report:



HRHNbrMj	Nomen	StockNbr	Actual_Cost	SerialNbr	Loc
N151	LATHE, ENGINE	3411001364013	4322.00	3411BL0009	BLDG 27 SEC 7
N151	TELEPHONE, STU III	518000N000927	1.00	5180ST0009	BLDG 27 SEC 7
N151	BARCODE READER	58383311PLM	2532.00	BRD-001-029	UNASSIGNED
N151	ANSWERING MACHINE	701000N452825	232.00	AF-0009	UNASSIGNED
N151	MONITOR, 19" COLOR	7025000001952	933.00	178201-LM9	BLDG 27 SEC 7
N151	COMPUTER, PENTIUM III	7025010000568	3101.00	100-KM-009	BLDG 27 SEC 7
N151	PRINTER, LASER	7025010032221	3622.00	9771-LP-0009	BLDG 27 SEC 7
N151	HANDHELD COMPUTER	702501N000433	499.00	33-010-017	UNASSIGNED
N151	HANDHELD COMPUTER	702501N000433	499.00	33-010-018	UNASSIGNED
N152	CD ROM	7025703601000	123.00	VD-322111-5	BLDG 222435
N152	MONITOR, 17" 100HS	7025703616122	455.00	32342-Q1-010	BLDG 22
N190	LATHE, ENGINE	3411001364013	4322.00	6100DL00019	BLDG 74
N190	COPIER SYS XEROX	3610011297764	2322.00	6100DL0034223	UNASSIGNED
N190	TELEPHONE, STU III	518000N000927	1.00	5180ST00019	BLDG 74
N190	BARCODE READER	58383311PLM	2633.00	BC-300-007	UNASSIGNED
N190	ANSWERING MACHINE	701000N452825	232.00	AF-0019	UNASSIGNED

Activity: QuickQuery Without The Query Wizard

Student Hands-On With Instructor Direction

Unit of Study: QuickQuery (without the Wizard)

Application: This activity will be used to apply what you have learned in the previous lesson. You will build a query without the wizard and then use various functions to manipulate your data.

Report Type: This report will display assets with acquisition cost, filtered by major hand receipt holder number and grouped by nomenclature.

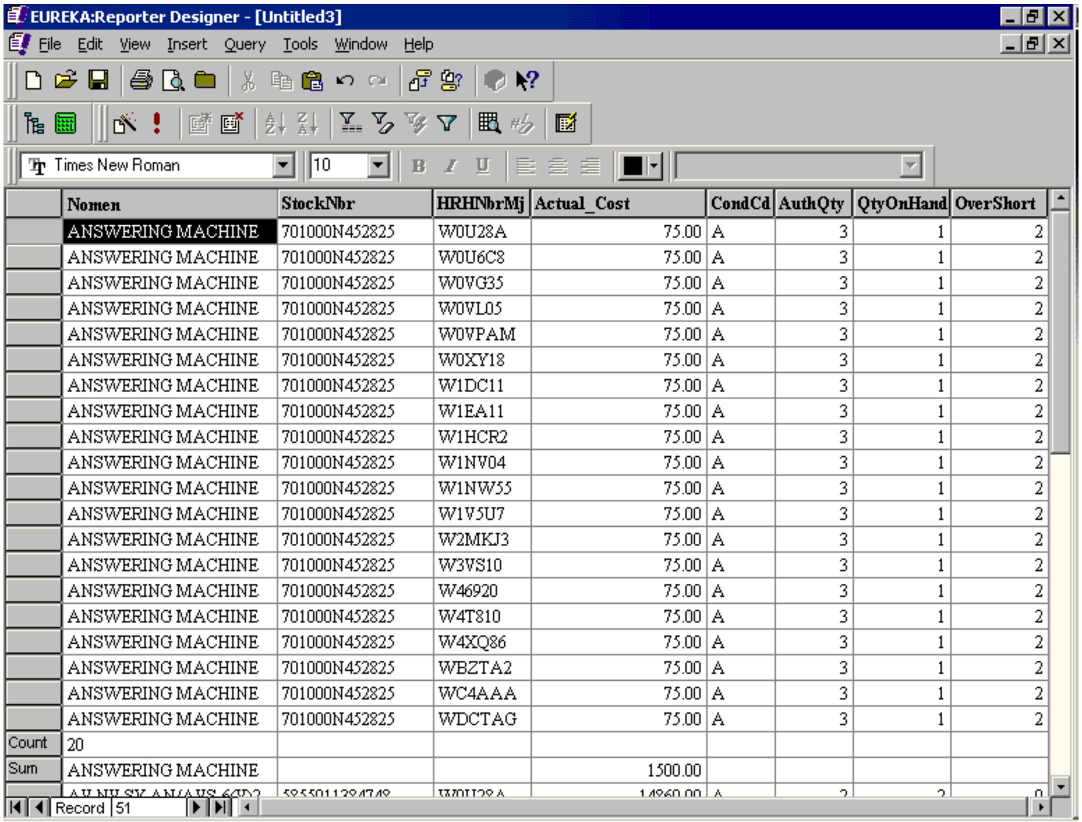
Instructions:

1. Open a new QuickQuery report without the Wizard.
2. Select the following fields for your QuickQuery report:

BUSINESS VIEW: END ITEM SERIAL		
FOLDER(S)	**DATA ELEMENT(S)**	
Catalog	ARC Nomen	Stock Nbr
Hand_Receipt_Holder	HRH Nbr Mjr	
Serial_Hand_Rcpt.-Auth	Acq Cost Cond Cd	Auth Qty Qty On Hand

3. Change the name of **Acq Cost** to Actual Cost or a comparable term.
4. Delete the **ARC**.
5. Group on the **Nomen**.
6. Count on the **Nomen**.
7. Build a Custom Column labeled **Over/Short**.
8. Subtract the **Qty On Hand** from **Auth Qty**, which will equal the Over/Short column.
9. Filter for **HRH Nbr Mjr** Like W*.
10. Sum on the **Acq Cost**.
11. Save the report in the *Eureka* folder on your Desktop as **QQACTY**.
12. Close the report.

Example of finished report:



	Nomen	StockNbr	HRHNbrMj	Actual_Cost	CondCd	AuthQty	QtyOnHand	OverShort
	ANSWERING MACHINE	701000N452825	W0U28A	75.00	A	3	1	2
	ANSWERING MACHINE	701000N452825	W0U6C8	75.00	A	3	1	2
	ANSWERING MACHINE	701000N452825	W0VG35	75.00	A	3	1	2
	ANSWERING MACHINE	701000N452825	W0VL05	75.00	A	3	1	2
	ANSWERING MACHINE	701000N452825	W0VPAM	75.00	A	3	1	2
	ANSWERING MACHINE	701000N452825	W0XY18	75.00	A	3	1	2
	ANSWERING MACHINE	701000N452825	W1DC11	75.00	A	3	1	2
	ANSWERING MACHINE	701000N452825	W1EA11	75.00	A	3	1	2
	ANSWERING MACHINE	701000N452825	W1HCR2	75.00	A	3	1	2
	ANSWERING MACHINE	701000N452825	W1NV04	75.00	A	3	1	2
	ANSWERING MACHINE	701000N452825	W1NW55	75.00	A	3	1	2
	ANSWERING MACHINE	701000N452825	W1V5U7	75.00	A	3	1	2
	ANSWERING MACHINE	701000N452825	W2MKJ3	75.00	A	3	1	2
	ANSWERING MACHINE	701000N452825	W3VS10	75.00	A	3	1	2
	ANSWERING MACHINE	701000N452825	W46920	75.00	A	3	1	2
	ANSWERING MACHINE	701000N452825	W4T810	75.00	A	3	1	2
	ANSWERING MACHINE	701000N452825	W4XQ86	75.00	A	3	1	2
	ANSWERING MACHINE	701000N452825	WBZTA2	75.00	A	3	1	2
	ANSWERING MACHINE	701000N452825	WC4AAA	75.00	A	3	1	2
	ANSWERING MACHINE	701000N452825	WDCTAG	75.00	A	3	1	2
Count	20							
Sum	ANSWERING MACHINE			1500.00				

Skill Builder: QuickQuery Without The Query Wizard

Objectives: You will:

- Review Building a QuickQuery Without The Query Wizard (Exercise below)
- Discussion Questions
- Practical Exercise to build a QuickQuery Without The Query Wizard

Complete the following exercise:

1. Outline the steps to perform when setting your preference for Manual Re-Query

a. ______________________________ c. ________________________________

b. ______________________________ d. ________________________________

2. What action(s) take place when you depress the F2 key?

3. You cannot change the name of a column heading. **(True or False)**

True _______ False _______

4. To delete a column, you first __________________ the column then depress the _______ key on your keyboard.

5. When your query has too many columns, it may be impossible to view them all at one time. ______________________ a column helps you identify the content(s) of the row(s).

6. ____________ _____________ are used when you want to apply values to a query that are not available in the database.

7. You display the shortcut attributes menu by doing a ___________________ ______________________ with your ___________________.

8. Where is the keypad located that enables you to create numerical calculations?

____

Discussion Questions:

1. **Review the Grouping/Ungrouping Column Function.**
2. **Discuss why you would use and what are the advantages of QuickQuery without using the Query Wizard.**
3. **Describe the Ad Hoc Filtering process.**

Practical Exercise: QuickQuery Without The Query Wizard

Independent Student Report

Unit of Study: Building A QuickQuery Without The Query Wizard

Application: This activity will be used to apply what you have learned in the previous lesson. You will build a query without the wizard and then use various functions to manipulate your data.

Report Type: Asset listing by major hand receipt holders beginning with "W", grouped by nomenclature, displaying actual dollars or quantity on hand.

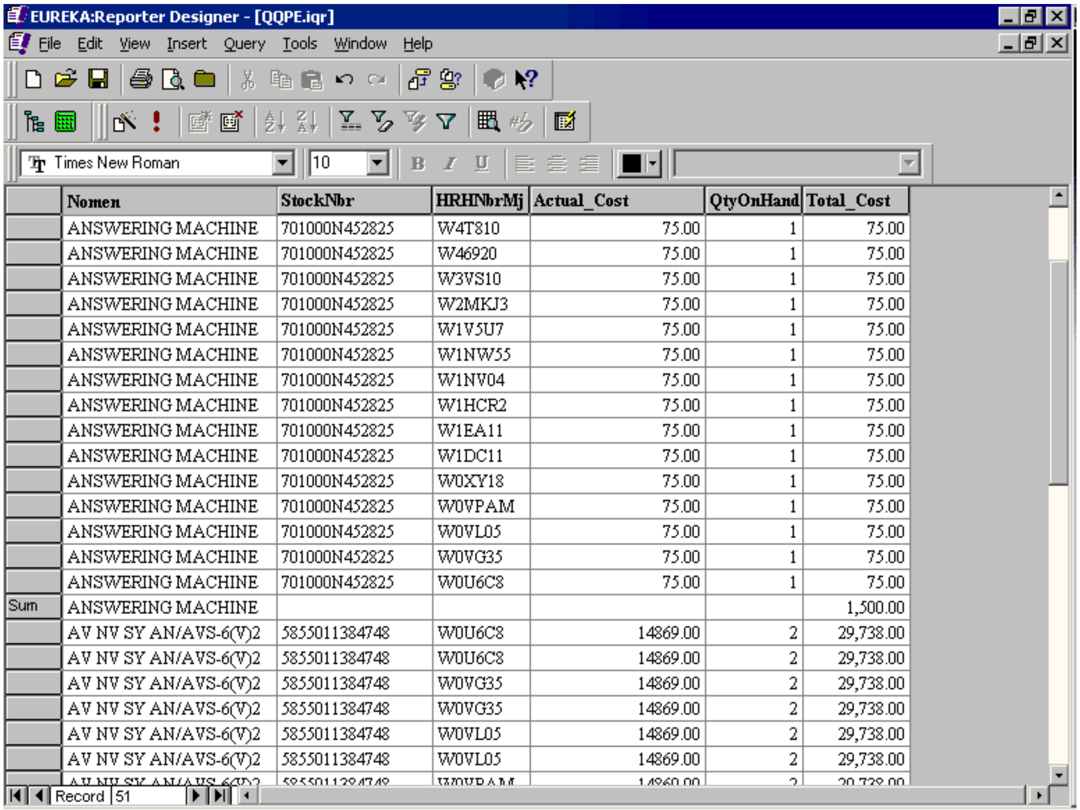
Instructions:

1. Open a new QuickQuery report without the Wizard.
2. Select the following fields for your QuickQuery report:

BUSINESS VIEW: END ITEM SERIAL		
FOLDER(S)	**DATA ELEMENT(S)**	
Catalog	Nomen Stock Nbr	Local Use
Hand_Receipt_Holder	HRH Nbr Mjr	
Serial_Hand_Receipt	Acq Cost	
Serial_Hand_Rcpt.-Auth.	Qty On Hand	

3. Change the name of the **Acq Cost** column.
4. Delete the **Local Use** column.
5. Group on **Nomen**.
6. Build a Custom column labeled **Total Cost**.
7. Multiply **Qty On Hand** by **Acq Cost**.
8. Change the Format to **Windows Numeric**.
9. Filter on **HRH Nbr Mjr** Like W*.
10. Sum for on the Custom column.
11. Save the report to the *Eureka* folder on your Desktop as **QQPE**.
12. Close your report.

Example of the finished Report:



	Nomen	StockNbr	HRHNbrMj	Actual_Cost	QtyOnHand	Total_Cost
	ANSWERING MACHINE	701000N452825	W4T810	75.00	1	75.00
	ANSWERING MACHINE	701000N452825	W46920	75.00	1	75.00
	ANSWERING MACHINE	701000N452825	W3VS10	75.00	1	75.00
	ANSWERING MACHINE	701000N452825	W2MKJ3	75.00	1	75.00
	ANSWERING MACHINE	701000N452825	W1V5U7	75.00	1	75.00
	ANSWERING MACHINE	701000N452825	W1NW55	75.00	1	75.00
	ANSWERING MACHINE	701000N452825	W1NV04	75.00	1	75.00
	ANSWERING MACHINE	701000N452825	W1HCR2	75.00	1	75.00
	ANSWERING MACHINE	701000N452825	W1EA11	75.00	1	75.00
	ANSWERING MACHINE	701000N452825	W1DC11	75.00	1	75.00
	ANSWERING MACHINE	701000N452825	W0XY18	75.00	1	75.00
	ANSWERING MACHINE	701000N452825	W0VPAM	75.00	1	75.00
	ANSWERING MACHINE	701000N452825	W0VL05	75.00	1	75.00
	ANSWERING MACHINE	701000N452825	W0VG35	75.00	1	75.00
	ANSWERING MACHINE	701000N452825	W0U6C8	75.00	1	75.00
Sum	ANSWERING MACHINE					1,500.00
	AV NV SY AN/AVS-6(V)2	5855011384748	W0U6C8	14869.00	2	29,738.00
	AV NV SY AN/AVS-6(V)2	5855011384748	W0U6C8	14869.00	2	29,738.00
	AV NV SY AN/AVS-6(V)2	5855011384748	W0VG35	14869.00	2	29,738.00
	AV NV SY AN/AVS-6(V)2	5855011384748	W0VG35	14869.00	2	29,738.00
	AV NV SY AN/AVS-6(V)2	5855011384748	W0VL05	14869.00	2	29,738.00
	AV NV SY AN/AVS-6(V)2	5855011384748	W0VL05	14869.00	2	29,738.00

Building A Summary QuickQuery

Unit of Study: Creating Summary Documents. A Summary Document provides summary information instead of detailed information. This reduces the amount of detail—multiple rows are aggregated together.

Application: This report is used when only summary information is requested.

Report Type: A summary report of all Hand Receipt Holders showing the total value of all their assets.

Activity: Student Hands-On with Instructor direction

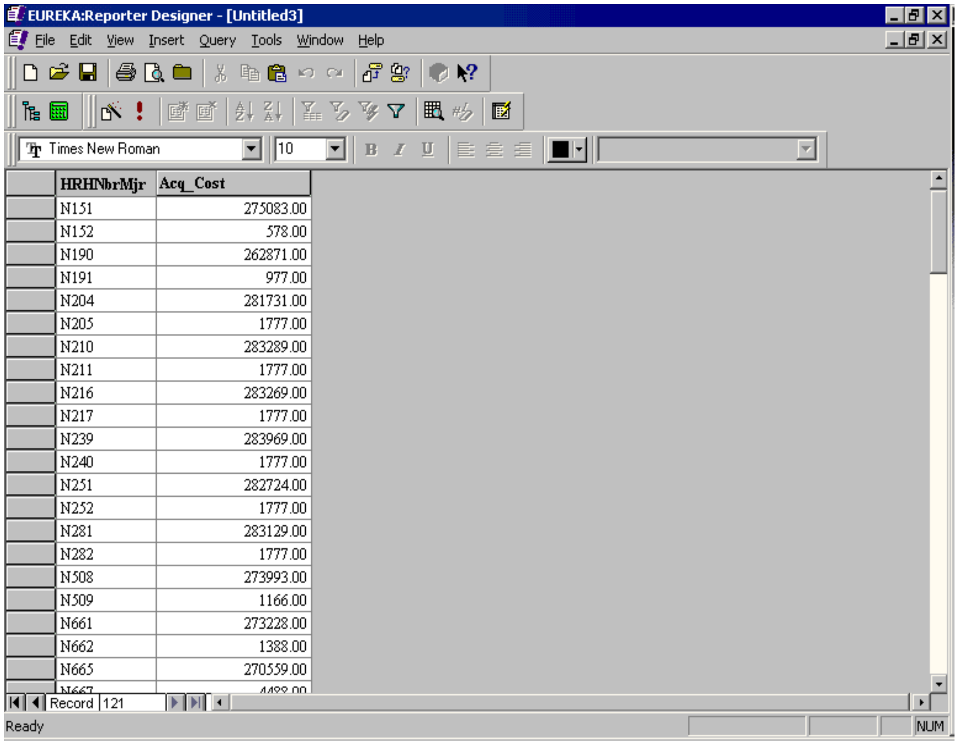
Instructions:

1. Open a new QuickQuery report without the Wizard.
2. Depress the **F2 Function Key** if your object directory is not open.
3. Select the following fields for your QuickQuery report:

BUSINESS VIEW: END ITEM SERIAL	
FOLDER(S)	**DATA ELEMENT(S)**
Quick_Start!	HRH Nbr Mjr Acq Cost

4. Double-click on the **Acq Cost** column heading.
5. Click on the drop down arrow for the Aggregate Function.
6. Scroll and select **Sum**.
7. Click OK.
8. View report.
9. Close the report.
10. **DO NOT** save the report.

Example of the finished report:



HRHNbrMjr	Acq_Cost
N151	275083.00
N152	578.00
N190	262871.00
N191	977.00
N204	281731.00
N205	1777.00
N210	283289.00
N211	1777.00
N216	283269.00
N217	1777.00
N239	283969.00
N240	1777.00
N251	282724.00
N252	1777.00
N281	283129.00
N282	1777.00
N508	273993.00
N509	1166.00
N661	273228.00
N662	1388.00
N665	270559.00

Building A Quick Filter In QuickQuery

Unit of Study: Creating Quick Filters in your QuickQuery Documents.

Application: Use this function when you want to reduce the amount of detail information on your query.

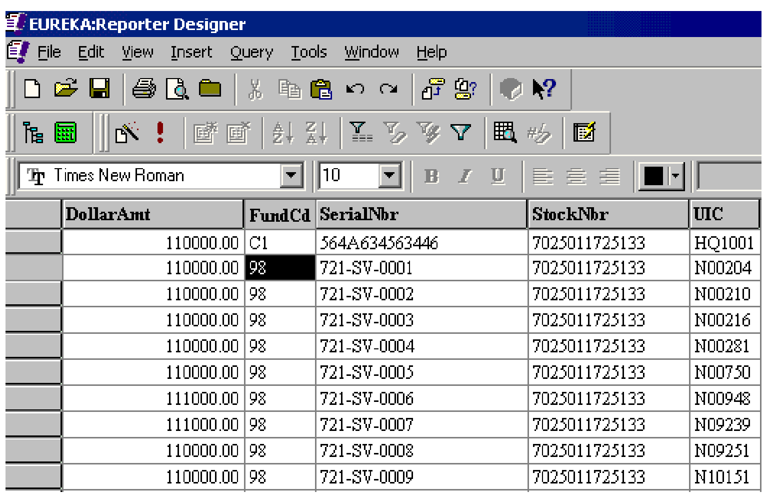
Report Type: UIC total dollar amounts under each individual fund code.

Activity: Student Hands-On with Instructor direction

Instructions:

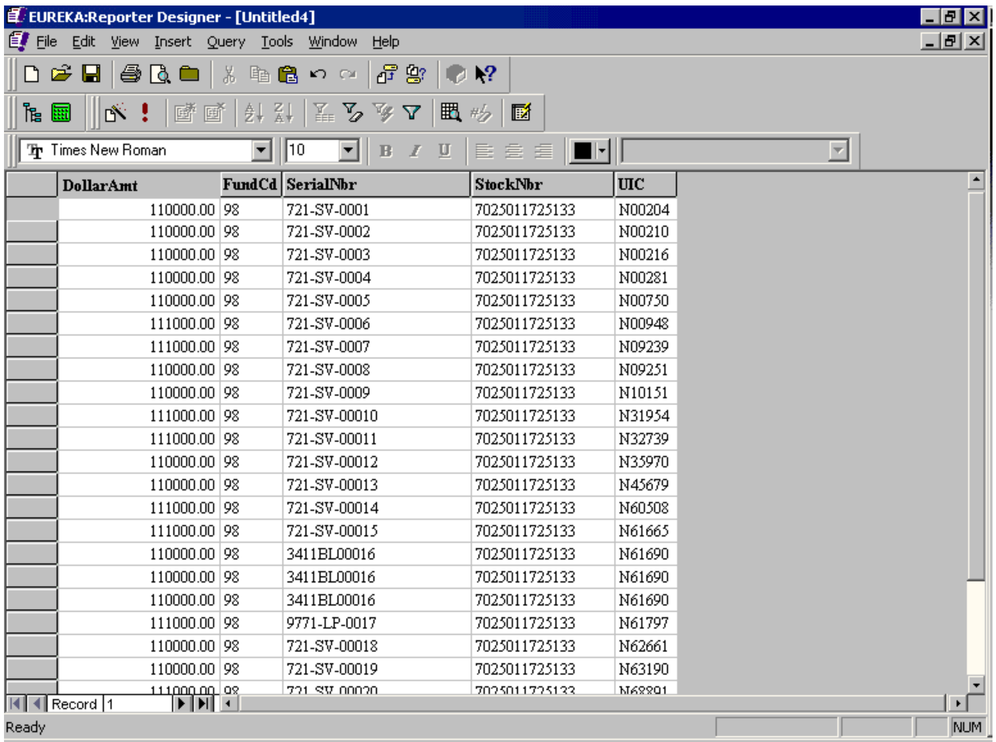
1. Open a new QuickQuery report without the wizard.
2. Depress the **F2 Function Key** if your object directory is not open.
3. Select the following fields for your QuickQuery report:

BUSINESS VIEW: ACCOUNTING TRANSACTIONS		
FOLDER	**DATA ELEMENTS**	
Accounting	Dollar Amt Fund Cd Stock Nbr	Serial Nbr UIC



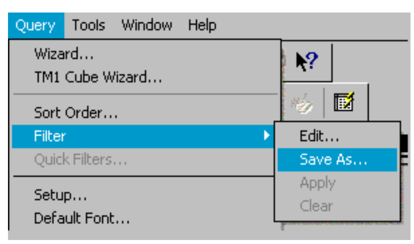
4. In the Fund Code Column, highlight one cell of Fund Code **98**.
5. Click on  (Apply Filter Icon). This will apply a filter to the current section. This action will automatically filter your report to show only the assets with the fund code of 98.

Example of the finished report:

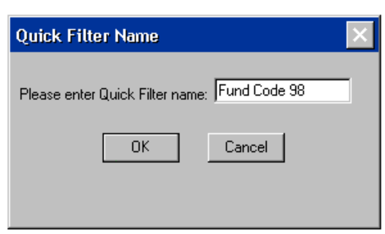


DollarAmt	FundCd	SerialNbr	StockNbr	UIC
110000.00	98	721-SV-0001	7025011725133	N00204
110000.00	98	721-SV-0002	7025011725133	N00210
110000.00	98	721-SV-0003	7025011725133	N00216
110000.00	98	721-SV-0004	7025011725133	N00281
110000.00	98	721-SV-0005	7025011725133	N00750
111000.00	98	721-SV-0006	7025011725133	N00948
111000.00	98	721-SV-0007	7025011725133	N09239
110000.00	98	721-SV-0008	7025011725133	N09251
110000.00	98	721-SV-0009	7025011725133	N10151
111000.00	98	721-SV-00010	7025011725133	N31954
111000.00	98	721-SV-00011	7025011725133	N32739
110000.00	98	721-SV-00012	7025011725133	N35970
110000.00	98	721-SV-00013	7025011725133	N45679
111000.00	98	721-SV-00014	7025011725133	N60508
111000.00	98	721-SV-00015	7025011725133	N61665
110000.00	98	3411BL00016	7025011725133	N61690
110000.00	98	3411BL00016	7025011725133	N61690
110000.00	98	3411BL00016	7025011725133	N61690
111000.00	98	9771-LP-0017	7025011725133	N61797
110000.00	98	721-SV-00018	7025011725133	N62661
110000.00	98	721-SV-00019	7025011725133	N63190

6. At the menu bar, select **Query>Filter>Save As**.



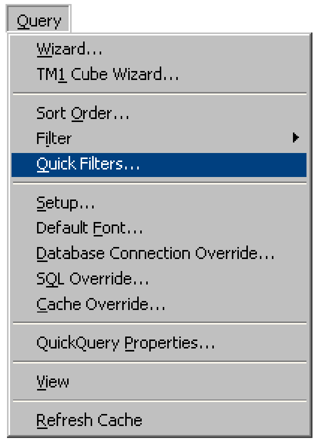
7. The Filter Name Screen will come up. Enter **Fund Code 98** in the window.



8. Click **OK.**

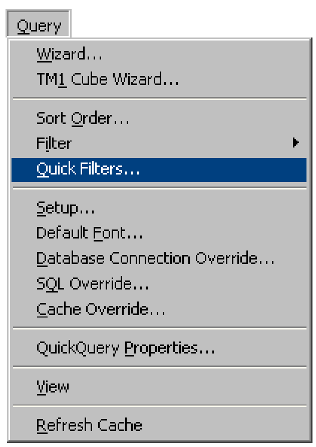
9. Click on  (Clear Filter Icon). This action will clear your document of the Quick Filter.

10. At the menu bar select **Query>Quick Filters…**



This will bring up the Quick Filter Screen that will list your Quick Filter. From here you can select the listed filter and it will apply it to your document.

11. Highlight **Fund Code 98**.
12. Click **OK**. Your document is now filtered again by the fund code of 98.



13. Clear the filter by using the Clear Filter Icon.
14. Repeat the process for Fund Code C1 (start at Step 4 through Step 8).
15. After filtering by C1, save your report as **QQFILTER**, we will be using it in the next exercise.

Building Translate Values Using QuickQuery

Unit of Study: Creating Translate Values within a Document.

Application: Value translations allow you to substitute one value for another.

You can use value translations to:

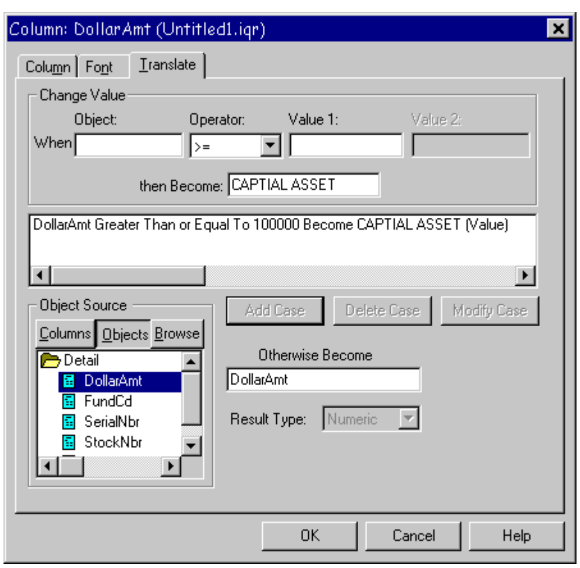
- Replace a technical term or code with a familiar term
- Draw attention to a significant value
- Add more information about certain values
- Express a numerical month as an alphabetic month

Report Type: Continuation of fund code report (QQFILTER) translating dollar amount.

Activity: Student Hands-On with Instructor direction

Instructions:

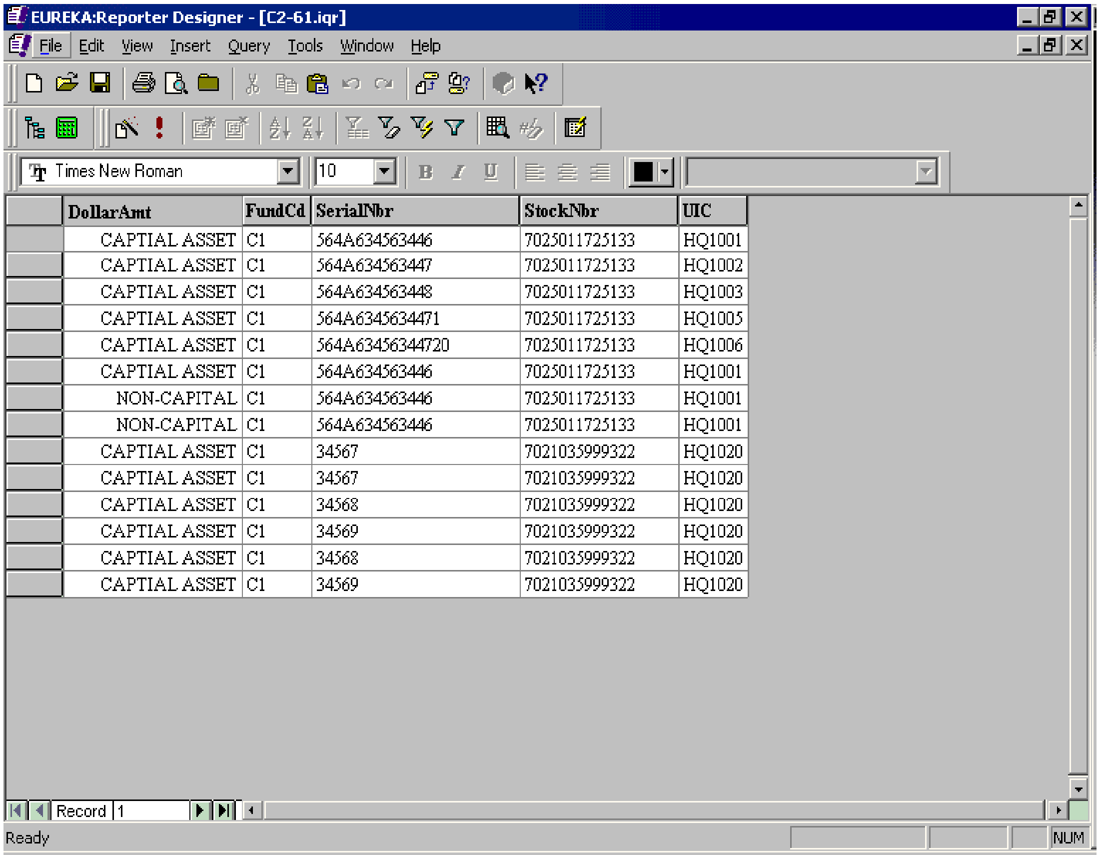
1. If closed, open **QQFILTER** report.
2. Double-click on the Dollar Amt column heading.
3. The Column Dollar Amt window will appear.
4. Select the **Translate** tab.
5. Double-click on the **Detail** folder in the Object Source.
6. Double-click on **Dollar Amt** to move it to the Object field.
7. Set the Operator to **>=** (**greater than or equal to**).
8. Enter **100000** in Value1.
9. **Then Become:** Enter "**CAPITAL ASSET**".
10. Click Add Case.
11. **Otherwise Become:** Enter "**NON-CAPITAL**".



Cases	
Add Case	Activates your condition.
Delete Case	This will remove an existing condition. You will need to highlight the case first before you select this button.
Modify Case	This will allow you to make a change to an existing condition. You will need to highlight the case first before you select this button.

12. Click **OK**.
13. Save your report.
14. **DO NOT** close the report – we will continue to use it in the next Unit of Study.

Example of the finished report:



DollarAmt	FundCd	SerialNbr	StockNbr	UIC
CAPTIAL ASSET	C1	564A634563446	7025011725133	HQ1001
CAPTIAL ASSET	C1	564A634563447	7025011725133	HQ1002
CAPTIAL ASSET	C1	564A634563448	7025011725133	HQ1003
CAPTIAL ASSET	C1	564A6345634471	7025011725133	HQ1005
CAPTIAL ASSET	C1	564A63456344720	7025011725133	HQ1006
CAPTIAL ASSET	C1	564A634563446	7025011725133	HQ1001
NON-CAPITAL	C1	564A634563446	7025011725133	HQ1001
NON-CAPITAL	C1	564A634563446	7025011725133	HQ1001
CAPTIAL ASSET	C1	34567	7021035999322	HQ1020
CAPTIAL ASSET	C1	34567	7021035999322	HQ1020
CAPTIAL ASSET	C1	34568	7021035999322	HQ1020
CAPTIAL ASSET	C1	34569	7021035999322	HQ1020
CAPTIAL ASSET	C1	34568	7021035999322	HQ1020
CAPTIAL ASSET	C1	34569	7021035999322	HQ1020

Exporting Your Query

INTRODUCTION

If you want to share your query or output document with someone who does not have the *Eureka* software, then you can export the data to another application.

Exporting a document creates a file in the format you choose. You can export from QuickQuery windows, FreeForm windows, and output windows.

When you export from a FreeForm window or QuickQuery window, *Eureka* Reporter Designer submits the query, formats the data if necessary, and exports your document.

When you export from an output window, *Eureka* Reporter Designer exports the already-created output.

Reports or data can be sent to a comma-delimited files, or most commonly to a text, Excel, or HTML file.

OBJECTIVES

To show how a user can provide the results of a *Eureka* Report electronically to someone who does not have *Eureka* on their PC.

APPLICATION

The most common use of this function is to send information which a user pulls out of *Eureka* , and wants to share it electronically with someone who does not have *Eureka* installed, but does use a type of file, like Excel or an Internet Browser (HTML).

PREREQUISITES

Eureka Reporter Designer is appropriately loaded and configured.

ACTIVITY

Student Hands-On with Instructor direction

REPORT TYPE

We will use the Fund Code report (**QQFILTER**) for exporting.

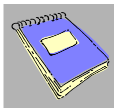
STEPS TO PERFORM ACTION

1. If closed, open the report named **QQFILTER**.
2. Select the Export icon .

-OR-

3. Select **File** from the menu bar.
4. Select **Export…** from the program group.
5. Change **Save in** to **Desktop**.
6. Change **Save as type** to **Excel File (*.xls)**.
7. Click **Export**.

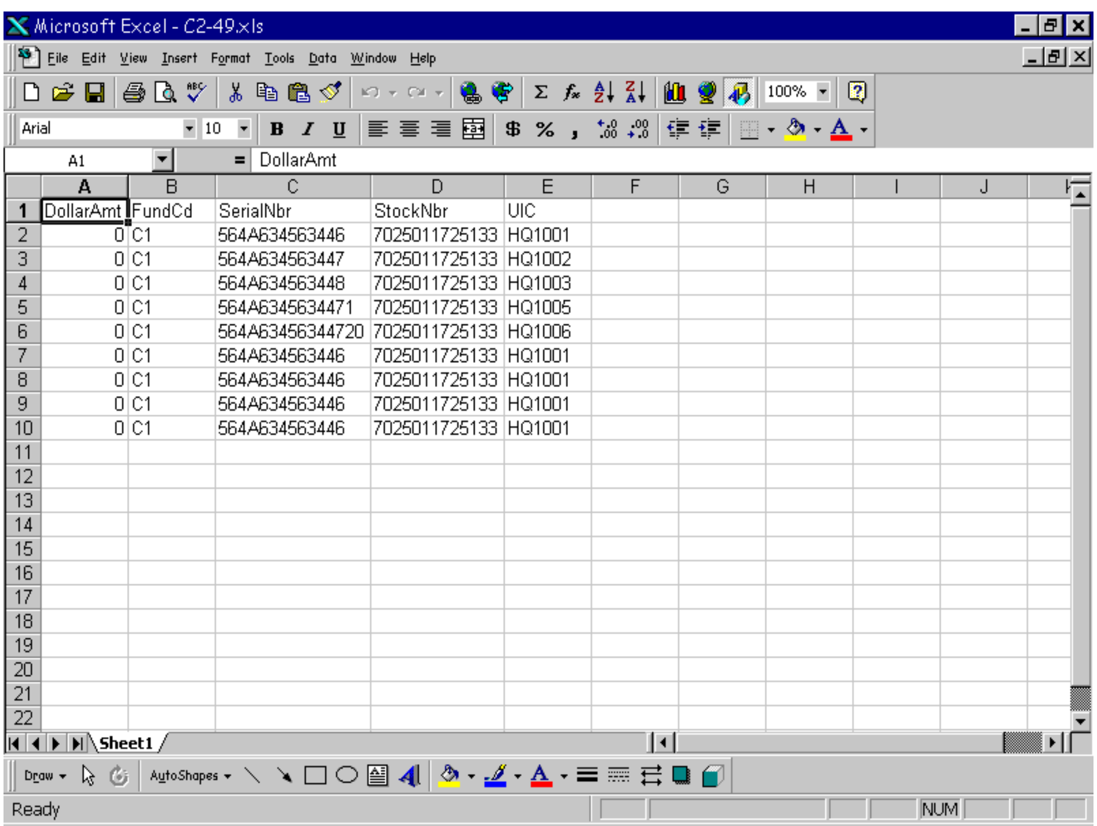
If you have any quick filters in your report, the Quick Filter selection window will display. If this happens, just click OK.



NOTE:
There are several different formats that you can export to (i.e., HTML, text file, Excel file).

8. Close your report.
9. Double-click on **QQFILTER.xls** from your Desktop.

Example of the finished report:



DollarAmt	FundCd	SerialNbr	StockNbr	UIC
0	C1	564A634563446	7025011725133	HQ1001
0	C1	564A634563447	7025011725133	HQ1002
0	C1	564A634563448	7025011725133	HQ1003
0	C1	564A6345634471	7025011725133	HQ1005
0	C1	564A63456344720	7025011725133	HQ1006
0	C1	564A634563446	7025011725133	HQ1001
0	C1	564A634563446	7025011725133	HQ1001
0	C1	564A634563446	7025011725133	HQ1001
0	C1	564A634563446	7025011725133	HQ1001

Emailing Your Query

INTRODUCTION

It is possible to share query/report results with others by attaching the query/report to an electronic mail.

OBJECTIVES

To practice and learn how to attach files to electronic mail.

APPLICATION

Used to email your queries to other users.

REPORT TYPE

Fund Code report (**QQFILTER**).

PREREQUISITES

Eureka Reporter Designer is appropriately loaded and configured.

ACTIVITY

Instructor-led lecture

STEPS TO PERFORM ACTION

If the recipient is located on your email server, use these steps:

1. Open the **QQFILTER** report.
2. Select **File** from the menu bar.
3. Select **Send Mail…** from the program group.

If the recipient is **NOT** located on your email server, you will need to open your email application and type in the recipient's email address and send the query as an attachment.

Page Setup

INTRODUCTION

Setting up your page allows you to control the appearance of your document through several page options, including titles, page numbers, layout, margins, borders, headers and footers, background images, etc.

OBJECTIVES

To practice and learn how to change the page setup.

APPLICATION

Used to set up page headers, footers, page numbers, etc.

REPORT TYPE

None

PREREQUISITES

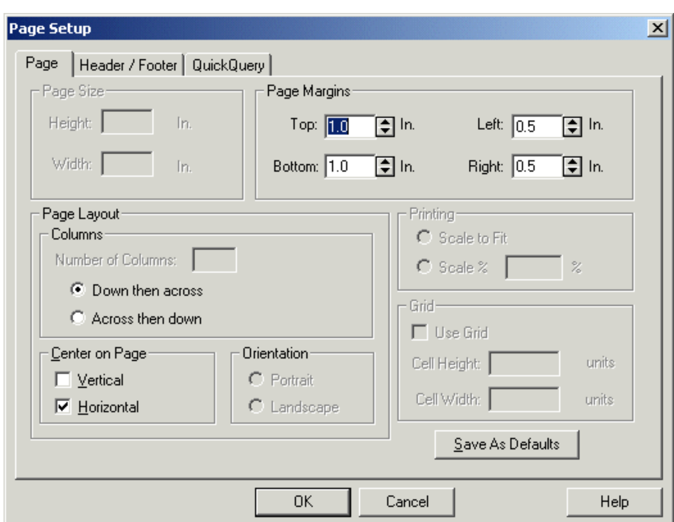
None

ACTIVITY

Instructor-led lecture

STEPS TO PERFORM ACTION

1. Select **File** from the menu bar.
2. Select **Page Setup…** from the program group.

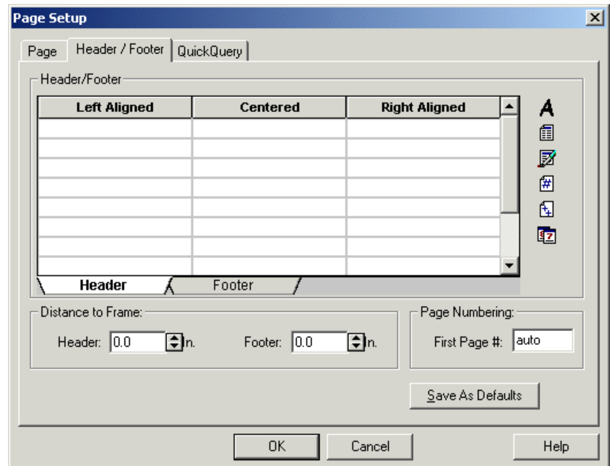


STEP 1:

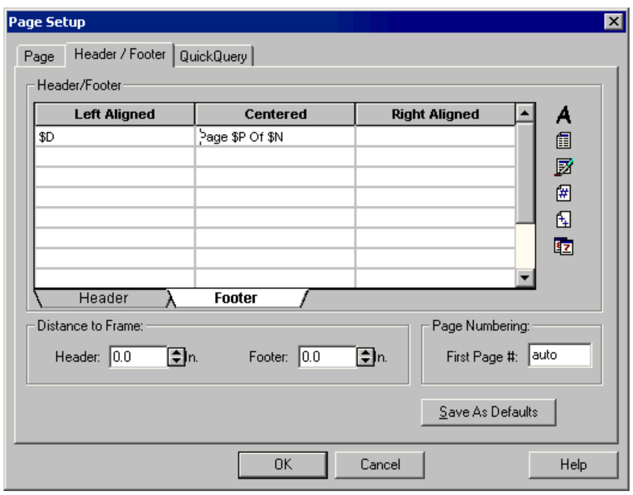
a. **Page Size:** This option is not available in QuickQuery.
b. **Page Margins:** Your page margins are defaulted to the current Windows settings, but you can change, if needed.
c. **Page Layout:** Page layout controls how documents that are wider than your printer's page size are printed (when they are not scaled to fit the page).
d. **Printing:** This option is not available in QuickQuery.
e. **Center on Page:** Select how you want your output displayed on you page.
f. **Orientation:** This option is not available in QuickQuery.

g. **Grid:** This option is not available in QuickQuery.
h. Select the **Header/Footer** tab.

STEP 2:



a. Click the location where you want to insert the item (for example, if you want it centered on the first line of the header, select the header page and click in the first cell under **Centered**.
b. Use the tools along the side of the screen to change the font, enter the application name, file name, add page numbers, and add the date to your report.
c. Click the **Footer** tab.



STEP 3:

The default is to print the date and time on the bottom left and then the page number on the right. These can be changed.

a. Delete the page number from **Right Aligned**.
b. Click in the first cell of the **Centered** column.
c. Enter **Page** and then add a space.

d. Click on .
e. Position your cursor after the **$P**.
f. Enter **Of** and add a space.

g. Click on . This will cause your page numbers to read: **Page X of XX**.
h. **Distance to Frame:** To change the distance between the header or footer and the frame containing the QuickQuery, enter the distance you need in the Header and Footer boxes.
i. **Page Numbering:** If you wish the page numbering to begin with a specific number other than 1, enter it in this box.
j. Select the **QuickQuery** tab.

STEP 4:

a. **Titles and Gridlines: Check** or **uncheck** the desired title or gridline box to control the appearance of your query for printing.
b. **Save As Defaults:** If you want to save your settings to use with future queries, click this button.
c. Click **OK**.