# 12b

## Basic User guide to Navigation, Filtering and Reporting

To make use of these notes you will require a basic licence for <u>frontend4b</u>usiness.

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# Overview

This overview gives an introduction to f4b, explains the basics of its use and introduces some f4b concepts.

## What is f4b?

f4b is a <u>Rapid Application Development tool that gives you the ability to analyse, edit, sort,</u> filter and report on any data held within your database. It allows you to extract detailed information in any combination that is meaningful and relevant to you.

f4b groups views of your database tables onto a tabbed form, each tab being a view. These groupings are called '*Activities*' within f4b. For example, jobs may have associated deliveries, sales and purchase invoice information that would be on their own tabs, the whole set of tabs would be saved as an activity.

Having used the filtering tools provided on an existing view the resultant view can be saved as a favourite view. This allows you to quickly reproduce your analysis as a report and/or input default values in your database.

Saved views and activities can be emailed directly or via the built in scheduler as management reports or key performance indicators for customers, these can be as .pdf documents or spreadsheets etc.

### Querying the database

For a typical query, you might go through the following process.

- 1. Choose an activity, for example, purchase invoices.
- 2. Filter the data
- 3. Manipulate the display
- 4. Save your query as a view
- 5. Create a report

### About the available data

The system administrator will have defined what data, that is which activities and views within your f4b application, are available to you. You will most likely have access to a subset of the whole database.

For speed f4b provides the option of caching data. This is usually significant where a view requires summing of detail data for presentation with header information (we term these Roll Up Views). How often such cached data is updated depends on whether your data entry is done via f4b or an external application. f4b applications will generally maintain the cache in real time while data entered via an external application will be updated at a period set within f4bs scheduler.



## f4b terminology

Below is a glossary of terms and concepts used in f4b and within this guide.

View	A table of data shown on a tab
Activity	A set of related views of your database. There may be one or more activities available to you
Favourite View	A favourite view relates to the tab you are on, generally it is a filtered version of the initial table presented that you have saved to use again. You can save any number of favourite views for each tab. The list of favourites is presented at the bottom of the File menu and changes when you change tabs.
Cache	From an f4b perspective the Cache consists of a table or tables which hold the result of running a Roll Up Query/Views, an example would be all the Customer account totals for the last 10 years. Since previous year results are unlikely to change often f4b identifies only the records that have changed and keeps them updated.
Filter	A filter allows you to include or exclude specific data rows from your view.
View Style	View data can be viewed either in a tabular style, much like a spreadsheet or as a WYSIWYG report in a report viewer



# **Getting Started**

## Accessing f4b

Generally you will have a shortcut on your desktop, double click.

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	<u>U</u> ser name
	Dennis
	Password
	****
	<u>O</u> K <u>C</u> ancel

Enter a valid user name and password and you will be taken to your Default Activity as set up by the administrator.

It is possible to pass start-up parameters to f4b from a shortcut. This means that other apps can fire off f4b passing the User name and Password resulting in this screen being bypassed.



### Your home screen/activity

Your home screen will look similar to the one shown below. The home screen displays your default activity with all its data. You can return to this at any time with the Home key

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- 2 Command Provides access to f4b functions.
- Menu
- 3 f4b Toolbar Icons give access to the most common functions within f4b. All of the functions available here are also available through the Command menu.
  - Refer to the section on The f4b toolbar.
- 4 Tab List A set of tabs generally describes a workflow or dataset that f4b terms an Activity. Tabs may be formally linked in that filtering on one tab effects the data retrieved when moving to a linked tab.
- 5 Filter Status Tabs that have filters set display a filter icon on the tab label.

means a filter is set on this tab, the filtering is unaffected by filtering on other tabs. This is often denotes a primary/header tab.

means a filter is set on a primary tab that affects the data retrieved, this is a linked tab and may display some primary tab data.

means a filter is set on a primary tab that affects the data retrieved, additional filtering has been added while viewing this tab, this is a linked tab.

By moving your mouse over the tab label f4b will display the filter as a tooltip without you needing to move to the tab.



6 Management This group of tabs provide aggregate (sum,avg etc) summary analysis Reporting of data on primary tabs. These are linked tabs. Currently four types of analysis are available.

League: allows you to group by one field and aggregate the numeric fields. Charting with Pies etc.

BreakDown: allows you to group by any number of fields and aggregate the numeric fields. An additional type of report view with drilldown is available on these tabs.

Period Comparisons: allows comparison and changes of numeric values over 2 selectable time periods for a selected grouping. Charting with bar charts etc.

OverView: This is a basic cross-tabulation (simplest form of pivot table), two grouping fields are selected along with a single numeric field. Charting with Stacked bars etc.

- 7 Filter line Entering info into this line results in the main data being filtered
- 8 Column Identifies the fields within the data record.

Heading

- 9 Main Data Grid the area that displays the data returned by your view. The records may be long and there may be many of them. Use the scroll bars on the bottom and right hand side to move through the data.
- 10Recordcan be used to select one (often for editing via a form) or a group of<br/>lines in the main grid, maybe for a simple copy and paste
- 11 Totals Line This line totals/sums your numeric data. The values presented are the sum of all pages not just the one that is being displayed. If you have the privileges this can be switched on and off via the main toolbar.



## Selecting an activity

To select and view an activity:

 Go to File> to display the activities available to you. The activities available to you are arranged at the top of the file menu and are arranged in sub menu groups depending on what User Groups you are a member of, generally the main menu item will be the name of a database. The first item on the menu, 'Activities' may also have a sub menu, the sub menu will then provide a list of Activities that are restricted to your personal use.

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### Using a favourite view

At the bottom of the file menu are your favourite views for the current tab/form (the form name is shown on the title bar). The colour coding will explain the conditional formatting being seen on the main grid.

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2\ Expected Receipts(24	1551)	E001	RDHJ1407000008	
3\ Free Stock(24549)		E001	RDHJ14070000008	
4\ No Product Code(2741	6)	E001	RDHJ1407000008	
5\ Stock Locations(245)	L3)	E001	RDHJ14070000009	
6\ Supply Chain(24541)		E001	RDHJ14070000009	
7\ Unallocated Despate	hes(24557)	E001	RDHJ1407000009	
Expected Receipt	SCS1234	ACME001	RDHJ14070000010	
Expected Receipt	SCS1234	JOH001	RDHJ14070000005	
Expected Receipt	SCS1234	JOH001	RDHJ1407000005	

Generally selecting a favourite view loads the grid with a pre-filtered view of the main data for this form.



### Creating a new view

You can create a new view by setting filters, selecting columns, setting column widths and a sort order on the data in the main grid.

### Setting a filter

1. Basic filtering. Typing into a cell of the filter column results in f4b performing a search of the data in that field/column, the search is automatically run when you stop typing (the speed at which f4b decides you have stopped typing can be individually adjusted by your administrator).

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Here we are looking for jobs where the Department begins with 'S' and Country begins with 'I' and Year = 2012.

Starting a filter cell with = < > or \* changes the way that f4b filters. An intuitive way of finding data in character fields is to type the first few letters which returns records that begin with your typed letters, then double clicking on a cell in the main grid resets the filter to be = the cell value.

Clicking the toolbar button 'Clear Filter'  $\bowtie$  on the Jobs tab, a primary tab, will also clear the filters on the other linked tabs.

To clear the filtering on all the tabs click either the toolbar buttons 'Home' or 'Hotel'

2. Negating a filter.

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i i	FXTJ1203000	SI	SI	OPEN002	FCL	AAA SI	GB	29/03/2012	2012	3	1000.0000	1200.0000	60.0000	60.0000	0.0000	50.0000

Here we are filtering for all the jobs where Country does not start with 'I'. To do this select the filter cell you want to negate and press the 'Not' button on the toolbar.

*3. Filtering for empty fields*. Double clicking a blank field in the main grid sets the filter for the current column to `Empty', the records returned will be both NULLs and zero length strings.



4. *Filtering for dates*. You can type a date directly into a filter cell, double click on a date field in the main data grid, choose from a range of common date filters or set a date range..

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Selecting a Date Range

5. Global filtering. A classic problem when filtering address data is that city and ZIP code data has been entered into the wrong columns. f4b provides a quick method of finding the records required.

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Simply enter your filter string into the global search box of the toolbar, press Enter or

6. Advanced filtering.

date filters

You can build more sophisticated filters by using the Custom Filter dialog from the toolbar.

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## Manipulating the display

f4b allows you to change how data is displayed within the main grid so that you can more easily view the relevant information.

Filters reduce the number of records available to be returned from the database. Returning more data than can be read on the screen when looking for information is not recommended as it creates unnecessary network traffic for something you are not actually looking at. There are a number of tools that help you summarise what you have selected before you, for example, send out an Excel report.

### Page Size



By default the f4b page size is 20 records (10 in mobile mode). In practice most PC screens can display about 30 records so settings greater than this will result in a scroll bar. It is generally quicker to use the paging buttons to the right of the page size.

### Record Count 🕨

Intuitively this button should move you to the last page, it does not do this but does put the record count onto the title bar (moving to the last page is technically simple but involves the database server in a great deal of work that slows other users). It is more efficient to sort your data to see the data required.

### Sorting by one column

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	IPSJ13060002060	AX	AX	GEO001	BTB	AX	GB	03/06/2013	2013	6	33333500.0000	33333500.0	
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	J0000088	SI	SI	UNIT062	LCL	AAA SI	GB	04/01/2012	2014	11	165531.0000	198255.0100	
	SXJ0004	SX	SX	ADA_001	FCL	LIVASH		29/05/2010	2010	5	108000.0000	108000.0000	
	IPSJ12040001347	SX	SX	0000051	FCL	AAA SX		25/04/2012	2012	4	77886.2200	77894.0200	

Clicking the column header sorts the data, a second click reverses the sort order. Here we are sorting by 'Sales Goods Totals' in descending order.

### Selecting columns/fields and multiple column sorting

Department     Transport Type     Customer Code     Lead     Leb     Sales     Sales       15     5X     5X     5X     5X     5X     5X       03     5X     5X     5X     5X     5X       04     5X     5X     5X     1       0000.51     51     00000122     2     Transport Type     7X       2000.51     51     00000122     2     Transport Type     7X       2     3     Customer Code     7X     ASC	
Order         Column Name         Vable         Default Value         Sort           03         SX         SX         I         0         Job Number         I         0         Job Number         I         I         Department         I         I	
03         SX         SX<	
33         3A         3A<	
14         SX         SX           8000.         SI         SI         0000012           1         Department         IV           2         Transport Type         IV           1000.         SI         SI         0000012           2         Transport Type         IV	
8000. Si Si 0000012 2 Transport Type 12 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
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000031 31 0000012 10 Sales Goode Tetal	
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12 Actual Cost Total	
13 Estimate Matched Total	
000. RX RX 000012	
6000. SI SI 0000012  □ SelectAll/None I Column Names OK Cancel	
000. RX RX 000012	
000 RX RX 0000012 12 Actual Cost Total	

What fields to display in the main grid is controlled by the Field Selector. Here we are showing 12 of the 200 plus fields available in the Jobs View. The fewer columns you select the quicker f4b will populate the grid (The Field Selector presents differently when viewing summary information like League Tables, Breakdowns and Overviews, see Management Reporting section)

- 1. To change which columns are displayed, ensure each column that you want to be visible is checked and uncheck any that you do not wish to be displayed. *TIP Where, as in this case, there are a lot of columns available it is often easier to find columns by sorting on Column Name by clicking the 'Column Name' header*)
- 2. To reposition a column(s), do the following.
  - Select the row(s) you want to move.

respectively.

• Use the controls on the right to move the column to the desired position.

and move the selected column(s) up and down one place within the list, respectively.

move the selected column(s) to the first/last position within the list,

1. You can set up multicolumn sorting using the combos in the Sort column

le I	dit View Filter	Tools Act	ions Help	-								
0		9, 🖬	Not 🕼 H 💷 🗍	🔳   X 🖦 🥿		+   🛛 🙂 🔜 +	Edit 💥	80 14 4 14	Ν 🛍 🖪 Σ σ	pdated:2017-02-	16 12:48 (0.6mi *	
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	110289001	AU003093	11	201	7 AI	ADD to Sort A-Z			0.0000	9.0000		
	110190001	AU003089	11	201	7 AL	ADD to Sort Z-A			0.0000	190.0000		
	110137001	AU003087	11	201	7 AI	Remove From Sor	t		0.0000	28.0000		
	109967001	AU003084	11	201	7 AI	Invert This Colum	n Sort		0.0000	183.0000		
	110290001	AU003094	11	201	7 AI	Remove ALL Sorts			0.0000	357.0000		

You can also set the sort order via right clicking the column headers

2. When you have made your changes, click **OK**.

This closes the window and refreshes the main data displayed with only your selected columns visible and in the order shown in the Field Selector window.



# Displaying totals Σ

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Job Number	Department	Transport Type	Customer Code	Load Type	Job Route	Country	Date	Year	Period	Sales Goods Total	Sales Grand Total	
SXJ0000084	SX	SX	COLD011	FL	GRGA		10/07/2011	2011	7	10.0000	10.0000	
SIJ0010029	SI	SI	C10674	FCL	DWL2		08/07/2011	2011	7	35.0000	46.0000	
SXKJ00120009	SX	SX	FRED002	FCL	GRGA		13/10/2011	2011	10	45.0000	45.0000	
SXJ0000071	SX	SX	UNIT062	LCL	GRGA	GB	16/06/2011	2011	6	50.0000	50.0000	
SIJ0010008	SI	SI	FRED04	LCL	WKW		04/03/2011	2011	3	55.0000	55.0000	
SXJ0000086	SX	SX	0000012	FCL	GRGA		18/08/2011	2011	8	100.0000	100.0000	
SXJ00000047	SX	SX	BARN003	LCL	GRGA		12/01/2011	2011	1	100.0000	100.0000	
SIJ0010115	SI	SI	0000072	LCL	AKTAU		29/09/2011	2011	9	100.0000	100.0100	
SXJ0000064	SX	SX	ARMS014	LCL	GRGA		05/06/2011	2011	6	155.0000	186.0000	
SXJ00000050	SX	SX	SCS	LCL	GRGA	GB	26/01/2011	2011	1	200.0000	200.0000	

Once you have the records and fields you are interested in, clicking this button will switch on and off the totals line. The Totals displayed in this line are the sum of all the records matching your filter rather than the sum of those displayed on the current page.

### Changing the width of columns

To change the width of a column within the query table:

1. Position the cursor over the right column divider within the row of column headings.

ĺ	Job Number	Transport Type	Department	ob Notice	Load Type	Placing the cursor on this line allows you to change the
	LHRAEJ01036	AX	LHRAE	JNBAE	IATA	width of the 'Department'
	LHRAEJ01035	AX	LHRAE	LHR-DXB	IATA	1
	CORTRJ00002	RX	CORTR	COR/DUB	LTL	column

The cursor becomes a double-ended arrow.

2. Click and hold down the left mouse button and drag and drop the column to the desired width. *TIP* - *If you double-click the column divider, the column will automatically resize to fit the widest data value in the column.* 



### Saving your View as a favourite

Once you have set up your view, you can save it as a favourite view for later use.

The view relates to the current tab, so when you save a view as a favourite, it is associated with the tab you are viewing at the time. Each tab will have its own list of favourite views.

1. To save your query click Save 🖾 on the f4b toolbar

Y Lines Y	Consignor	🗸 Consignee 🛛	Y Sales Transactions   Y Cost and Estimate Transactions   Y Haulage   Y Containers   Y League: Office/Pieces DESC   Y BreakDown Jobs   Y Overview: Load Type/Department/Proft
	=SX		
s Tanan			💀 Save Filter as User View
Job Number	Department	Transport Type	Format Dialect Remove Actions
SXJ0250	SX	SX	
SXJ10100001	SX	SX	Details SQL Fields
SXJ10100004	SX	SX	
SXJ10100009	SX	SX	
SXJ0235	SX	SX	Form jobjobhdr
PSJ000003	SX	SX	Elit Mode Grid
SXJ0248	SX	SX	a
SXJ02361	SX	SX	A Save Options T Totals
SXJ0238	SX	SX	A Save Options   Totals
SXJ0246	SX	SX	4
SXJ0245	SX	SX	4
SXJ0258	SX	SX	Description
SXJ0240	SX	SX	Jobs for the department Sea Export
SXJ0241	SX	SX	
sxj0255	SX	SX	Clear B T F
SXJ0257	SX	SX	9
SXJ0261	SX	SX	4
J0262	SX	SX	9
SXJ0251	SX	SX	Vihere [Department] = 'SX
J0265	SX	SX	
			Save Duration
			© Session C Permanent

The Save Filter as User View dialog will be displayed. Basic users do not have access to the SQL and Fields tabs or the menu options.

- 2. Select whether you want the view to be available for this session only, or permanent.
- 3. Give your view a name by entering it in the Tab Name field. View names must be unique.
- You can optionally set up conditional formatting from here using the <u>B</u>ackground, <u>T</u>ext and <u>F</u>ont buttons. If you do this your favourites list will reflect your choices and records matching your filter in the main grid will also match your choices irrespective of the favourite view you are displaying (conditional formatting can be turned on and off using the toolbar button ).
- 5. Click Save and when prompted click Yes to save your view.

### Removing a saved view

Views you own can be deleted via the File menu. Load the view into the main grid then File>Delete>User View. If you do not own the view or the view is displayed on opening an activity f4b will inform you.



## Reports (Basic) 🚨

While you are working on your data, you can view it at any time on screen as a report rather than in the Classic (spreadsheet-like) style, as described below.

Edit View Filter	Tools Action	s Help									<b>C</b>	
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obs 🛛 🐨 Lines 🖓 Cons	anor 🔽 Consid	neel 🍸 Sa	les Transactions	Cost	t and Estimate 1	Transactions	Haulage	Containe	rs 7 I	League: Office/Pieces [	DESC Y B	reakDown Jobs   `
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Job Number	Department	Transport Type	Customer Code	Load Type	Route	Country	Date	Year	Period	Total	Outstanding Total	Total
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frontend4	Departme	Transpor t Type	Customer Code	Load Type	Job Route	Country	Date	Year	Perio d	Sales Goods Total	Estimate Outstand	Estimate Total
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Job Number SXKJ00120014 IPSJ13050002051 IPSJ13050002050 FXTJ13070000136	Departme nt SXK SX SX SX SI SI SI	t Type SX SX SX SX SI	Code 1000002 1000002 1000002 1000002	Type FCL FCL FCL GRP	Route       AAA SX       AAA SX       AAA SX       AAA SX	IL IL IL	19/09/2012 31/05/2013 31/05/2013 02/07/2013	2012 2013 2013 2013 2013	d 9 5 5 7	Total 100.0000 875.0000 38110660.0000 0.0000	Outstand ing Total           0.0000           0.0000           47.1300           0.0000           1452.000	Total 0.0000 56.4800 831.5000 0.0000
Job Number           SXKJ00120014           IPSJ13050002051           IPSJ13050002050           FXTJ13070000136           FXTJ13070000137           FXTJ13070000142	Department           SXK           SX           SX           SI           SI	t Type SX SX SX SI SI SI SI	Code 1000002 1000002 1000002 1000002 1000002 1000002	Type FCL FCL GRP GRP FCL	Route       AAA SX       AAA SX       AAA SX       AAA SX       AAA SI       AAA SI       AAA SI	IL IL IL IL IL	19/09/2012 31/05/2013 31/05/2013 02/07/2013 10/07/2013 15/07/2013	2012 2013 2013 2013 2013 2013 2013	d 9 5 5 7 7 7 7	Total 100.0000 875.0000 38110660.0000 0.0000 0.0000 1452.0000	Outstand ing Total 0.0000 47.1300 0.0000 0.0000 1452.000 0	Total 0.0000 56.4800 831.5000 0.0000 0.0000 1452.0000
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Pressing this toolbar button will toggle you between the classic data grid view and the report view. In report view mode, ALL the selected data is returned to the f4b application then formatted and paginated by the report viewer.

Use the report viewer toolbar to change the display as required.

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This tool bar enables you to print or export to a .PDF file or EXCEL spreadsheet complete with the logo and other formatting. You can also email your report from here via the main toolbar button



## **Management Reporting**

At this time there are four analysis tab types supported by f4b. These tabs are linked tabs that summarise (aggregate) data from primary/header tabs. As with other linked tabs you can carry out further filtering, sort, size fields and report from these tabs. The main difference in use is noticed when using the Field Selector

## League tabs



This analysis can be used to display, for instance, market share type statistics. Determined by the TOP setting in the field selector (set to 5 here) the chart will rank the records based on the sort field, of the main grid. Records not in the TOP5 are summed together as a 'Rest' segment

## BreakDown tabs



This analysis by default presents the result as a drill down report. The results can also be presented in the other available styles by pressing the View Style toolbar button  $\Box$ 



### **Overview tabs**



*This analysis gives a basic cross tabulation of 2 columns. This is the simplest form of a Pivot Table.* 

### **Period Comparison tabs**



This analysis enables you to compare the performance of one period versa another of the selected Value.

## **Advanced Reporting**

f4b presents reports in place of the main grid using a .NET add on control 'ReportViewer'. What the report viewer does is stream the data returned by your Filter/SQL query with an .rdlc template, this template is pretty much an XML report template. The .rdlc templates used above are all created on the fly and kept in memory by f4b. It is however possible to save these templates to external files where they can be edited using Microsoft report design tools



such as Visual Studio. In practice any externally edited/created .rdlc can be loaded and run by f4b.

•	Edit View Filter	Tools Actions Help	📓 🔏 🖓 🖄 🖄 🖄 🗐 🕞 🤪 🕘 + Edit 💥 20 🚺 4 🕨 🏹 🏭 🕇 Dydated:2014-03-21 10:45 (5.6mins) -
	Lines Consignor Co	onsignee   Sales Transactions   Cost an	d Estimate Transactions   Haulage   Containers   League: Office/Pieces DESC   BreakDown Jobs   Overview: Load Type/Department/Profit
			all Report Save Options
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	SXJ0250	FCL	03 File Name C:\scs\frontend4business\Report Definitions\yobjobhdr.rdic Browse 0.0000
	J0000087	LCL	04
	IPSJ0000649	LCL	14 Embedding Options 0.0000
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	IPSJ0000075	LCL	14  Go (actual file name) 0.0000
	IPSJ0000784	LCL	14) SQL 0.0000
	FXTJ1202000039	FCL	23. Filter Description (eg WHERE) 0.0000
	FXTJ12020000040	FCL	23 * Saving the actual Connection String may present a security risk 0,0000
	AAA SIJ0000065	FCL	
	AAA SIJ0000067	FCL	07/
	IPSJ0001028	LCL	14 Save Cancel 0.0000
	IPSJ0001029	LCL	
	IPSJ12020001242	LCL	22/02/2012 2012 0.0000 0.0000 0.0000

If you want to start your report design from the automatically generated template, selecting *File>Report>Save Report Definition As...* brings up the dialog as shown. Save and edit externally.



Reports can be loaded using **File>Reports>Open**. To offer your report for running from a particular tab/form you will need access to the User Form Actions tab. Find your form then use **Actions>Link Report to Form Action** will guide you through populating the record.

## Activities

How much Basic users can do, with respect to activities, depends on privileges set by the Administrator. By default they can:-

### **Reorder tabs**

⊘ Z Jobs   Y Lines   Y Cos	Shift Tab First Page Next Page Previous Page	F	eft light o Start o End	1		+ Edit Consignor   ♥ (				Service and the service of the servi	akDown Jobs	V Overvi	iew: Load Type/Department/Profit
UID	Count Records Change Password	-	Load Type	Transport Type	Job Route	Company	Date	Departmer	Office	Collection Address 1	Collection Address 2	Collectior Address	Collection Address
▶ 12820001 F 12820002 F	Diary Default Report Layout	2012	FCL	SI	AAA SI AAA SI	01	14/02/2012	SI	FXT	2 CHANG	LINE	3 GGG GGG	0000012
	Document Management EMail Add to Basket Get Route Field List					t.		i i			ili.	* * *	
	Performance Analysis												

Tabs can be reordered by selecting the tab then using the **Tools>Shift Tab options** or by dragging and dropping while pointing at a tab name.

ne	(frontend4business)	(c) AHS 2013)\User	= dennis\Fe	orm = HaulageJobs	(20 of Mar	v)\Page = 1					-	-		1		
	Edit View Filter			©   ∭   X ≈s	<b>2</b> ()		🛃 🥲 🜑 Iose Tab	+ Edit	₩ 20	14 4 >	PI 100	δ				
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		Job Number FXTJ12020000039	Period 2	Year 2012	Туре	Transport Type SI	Job Route AAA SI	Company 01	Date 29/02/2012		Office		Collection Address 2	Collection Address 3	Collection Address	
	13016001		Period 2 2		Type FCL	Туре	Route			SI			Collection Address 2	Collectior Address 3	Collection Address	
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Tabs can be closed by selecting the tab then using the Close Tab toolbar button.

### Select a favourite view as a primary view

emo	(frontend4business	(c) AHS 2013)	User = dennis\F	orm = jobjobho	dr(20 of Ma	ny)\Page = 1												
	Edit View Filter	Tools A	ctions Help															
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	FXTJ1202000040	22/02/2012		SI	SI	0000042	FCL	AAA SI		2012	2	0.0000	0.0000	0.0000	0.0000			
	AAA SIJ0000065	06/02/2012		SI	SI	0000012	FCL	AAA SI		2012	2	0.0000	0.0000	0.0000	0.0000			
	AAA SIJ0000067	10/01/2012		SI	SI	0000012	FCL	AAA SI		2012	2	0.0000	0.0000	0.0000	0.0000			
	J0000088	04/01/2012		SI	SI	UNIT062	LCL	AAA SI	GB	2014	11	165531.0000	198255.01	321.0000	321.0000			
	AAA SIJ0000013	20/01/2012		SI	SI	0000012	FCL	AAA SI		2014	11	0.0000	0.0000	0.0000	0.0000			

The favourite view takes over the linked view filtering

#### Save an activity with a new name

							-			_			_		_	
	Job Number	Estimated Anival Date	Actual Arrival Date	Department	Transport Type	Customer Code	Lo	Dauta	Country	Year	Period	Sales Goods	Sales Grand Total	Actual Cost Total	Estimate Matched Total	
•	SXJ0250	03/09/2010		SX	SX	0000012	0	SaveActivity		-			0.0000	-50.0000	-50.0000	
	J0000087	04/01/2012		SI	SI	UNIT021		Owner	tom			Ŧ	1741.0000	0.0000	0.0000	
	IPSJ0000649	14/02/2012		CO	CO	0000051							0.0000	0.0000	0.0000	
	IPSJ0000650	14/02/2012		CO	co	0000051		Activity Name	Jobs (tom)				0.0000	0.0000	0.0000	
	IPSJ000075	14/02/2012		CO	co	0000051							0.0000	0.0000	0.0000	
	IPSJ0000784	14/02/2012		CO	co	0000051		Save Duration					0.0000	0.0000	0.0000	
	FXTJ12020000039	22/02/2012		SI	SI	0000042		Care Duration	· Session	C Perm	anent		0.0000	0.0000	0.0000	
	FXTJ12020000040	22/02/2012		SI	SI	0000042			Coontin		anon		0.0000	0.0000	0.0000	
	AAA SIJ0000065	06/02/2012		SI	SI	0000012			_		<b>.</b> .		0.0000	0.0000	0.0000	
	AAA SIJ0000067	10/01/2012		SI	SI	0000012				OK	Ca	ancel	0.0000	0.0000	0.0000	
	IPSJ0001028	14/02/2012		CO	со	0000051				2012			0.0000	0.0000	0.0000	

Use File>Save Activity to save the activity.

If the Administrator enables it:-

### Add Views to Activities

Edit View	Filter Tools Actions	Help		
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	23400 job-col	job-col	jobcol	Open View
	23400 job-col 23402 job-del	job-col job-del	jobcol jobdel	Open View

First select the blank tab at the end of the tab list then use **File>Forms** to open a forms tab. The views available with your privileges will be displayed. Select the required view and press the Open View button (If the button is not visible use the Actions Menu)

### **Create New Activities**



In practice the administrator giving you access to the menu **File>Forms** means you can create a new Activity using the methods described above. There is a shortcut to doing this however if the administrator provides you with access to the activity <New>. Selecting this simply closes all tabs in the tab list and opens the Forms Tab.



## The f4b toolbar

The table below describes the f4b functions available from the toolbar.

Icon	Description	Command	Functionality
V	Clear Filter	Filter>Clear	Clears all filters on the current tab.
$\textcircled{\black}$	Update Cache (or simply	Actions>Refresh name Cache	Obtains current data from the database and re-runs your query.
	Refresh Data if there is no Cache)		Depending on the size of the system database and the complexity of your query, this can take a few minutes and unless you believe the data to be more than a few minutes old it may be preferable not to use this function.
Q	Find In Any Field		Searches the query table data for the string in the adjacent box and returns all records with at least one matching field.
			The search is not case sensitive (both lower and uppercase matches are returned). Wildcards are permitted, so a search for LH*E for example, would match any number of characters between the LH and the E. A search for L??E would match exactly two characters between L and E.
			To search for empty fields, enter a space as the search string.
5	Custom Filter	Filter>Custom	Allows you to define a custom filter.
Not	Not (negative filter)	Filter>Not	Allows you to exclude matching data records from the query.
	Home	File>Home Activity	Returns you to your default activity (the one displayed when you first launch f4b). It removes any filters you may have set, restores any closed tabs and places tabs in the default order.
н	Hotel	File>Hotel/Last Activity	Reloads the current activity. Note that this is different from the Home key, which reloads your default activity. Hotel removes any filters you may have set, restores any closed tabs and places tabs in the default order.
0	Diary	Tools>Diary	Allows user to communicate with each other, keeps a record of emails and attachments sent out via f4b
Ħ	Field List	Tools>Field List	Allows you to select which data fields should be included in the query table display and to change the position of data columns within the table.
4	Document Management	Tools>Document Management	By selecting a record in the main grid documents can be attached and viewed
*	Add to Basket	Tools>Add to Basket	When set up allows the adding of data from selected records into a temporary table for editing and further use



Icon	Description	Command	Functionality
=1	Email	Tools>Email	Allows you to send or schedule emails from
			the current activity
<b>i</b>	Close Tab	File>Close Tab	Closes the current tab. The data remains in your query, but is not displayed.
	Save Filter As User View	File>Save Filter As User View	Saves the activity and filters on the current tab as a favourite query.
	Conditional Formatting	View>Conditional formatting	Toggles between displaying/hiding any conditional formatting
۲	Route Planning	Tools>Get Route	Enabled when there is routable information on the main grid. Fires off your web browser with the route from your set location. Can be used in conjunction with Add to Basket to get a route with vias
+	Add Record	Edit>New Record	On editable data can be used in conjunction with the Edit button to add data to the main grid. Predefined default values are combined with values from the filter line and are automatically entered.
Edit	Edit Data	Edit>Edit	Enables/disable editing of data. Depending on the edit mode for the current view this button will either enable editing on the grid or prompt you to select a record, after selecting a record pressing Edit will open a form for you.
×	Delete Selected Line	Edit>Delete	On editable data can be used in conjunction with the Edit button to delete data to the main grid.
20	Records/Page		Sets how many records are displayed on one screen page.
14 A D	First/Prev/Next	Tools>First Page	Populates the main grid with data records
		Tools>Next Page	determined by Records/Page
		Tools>Previous Page	
M	Count Records	Tools>Count Records	Displays the total number of records in the current view after RecordCount = in the title bar.
ili.	Graphical Analysis	View>Graphical Analysis	This button is only enabled for Administrator and Developer users. Clicking it while viewing a primary/header tab results in new management reporting tabs being set up and added to the current activity.
<u>3</u>	View Style	View>Style>Simple Report View>Style>Classic	Toggles between displaying the Classic View and the Report View. On Breakdown analysis tabs a breakdown toggle is added
Σ	Totals Line	View>Totals Line	Toggles between displaying/hiding the totals line. When displayed, the totals line shows the totals of numeric data fields (columns) within the query table.