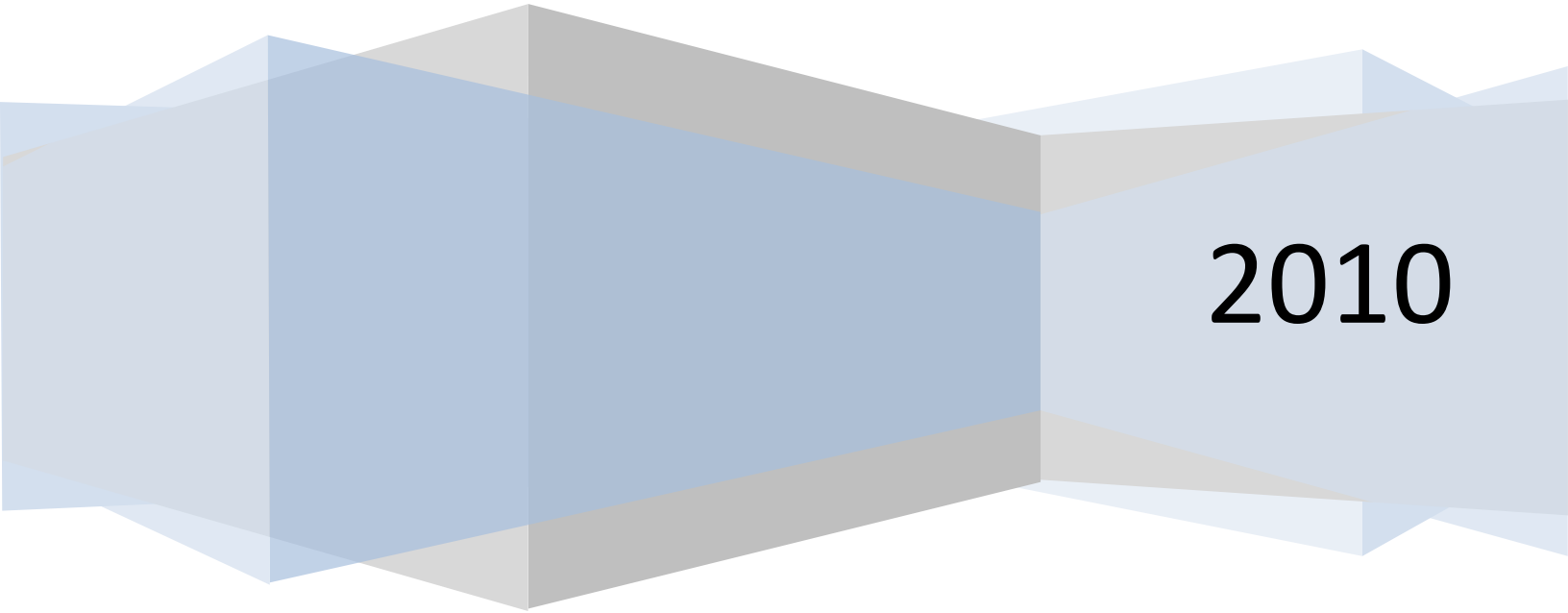
NAZDAQ®

NAZARETH DATA QUEST

B2Win 7

Report Customizer Guide

NAZDAQ – Nazareth Data Quest Ltd.



2010

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1 Introduction

One of the most powerful features of *B2Win* is that it does not only take data from Baan/ERP Ln and transfer it to different file formats, but it helps "translate" the output from "made to be printed" format to logical "tables" – with one header line only and different columns with well defined data types (most common application is Excel). In the following manual we will discuss the different methods used in *B2Win* in order to allow easy conversion of reports to table format.

Most reports in Baan and ERP Ln can automatically be transferred to table format with no additional human intervention needed. For some reports, additional information needs to be given to *B2Win* in order to allow better conversion into tabular mode. If you have a sub-headers along your report, or a strange header, or a different delimiter than the standard "|" (Pipe) in Baan/ERP Ln reports, it is suggested to use the "Customize" option in order to allow better report conversion. Every report can have a different customization per language. Once these customizations are built on a sample data report, they can be used every time this same report is run to the *B2Win* device – streamlining the generation of meaningful table format reports.

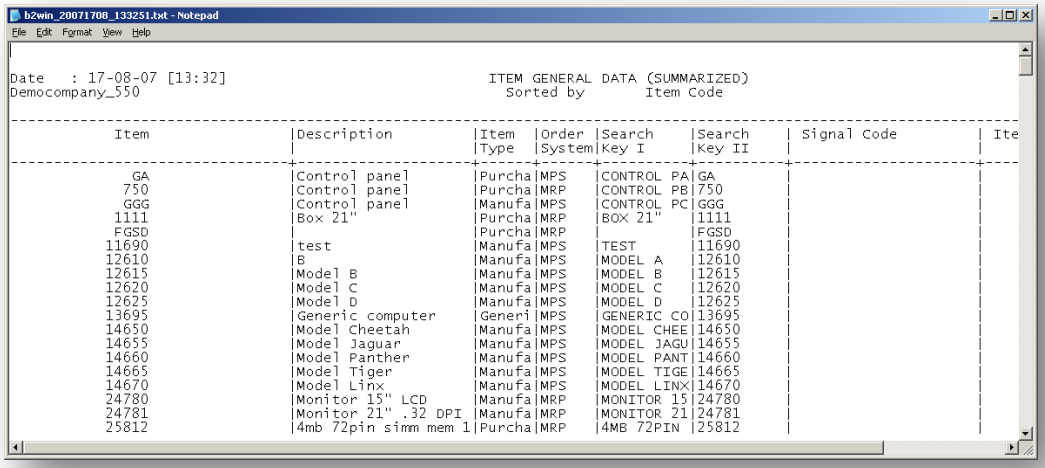
1.1 Report Types

We categorize three main report types in Baan and ERP Ln, when it comes to converting using *B2Win*. First, "*Standard reports*" that have a clear header, aligned detail lines and a common delimiter, which can be automatically imported to table format with *B2Win*. From the other hand, "*Non-standard reports*" miss one of the characteristics of Standard reports, and may include sub-headers and sub-totals in the report. Non-Standard reports need to be customized in order to be converted to tabular mode. The third type of reports is "*Transpose reports*", which have titles on every line and the data in front of the title line. These reports need customization and must be "transposed" in order to convert them properly to table format.

1.1.1 Tabular – Standard

The following is the definition of ***Standard Baan/ERP Ln Reports*** that can automatically be imported to table format using *B2Win* smart automatic engine – without the need of the ***B2Win Report Customizer (RBC)***.

An example of Standard report:



b2win_20071708_133251.txt - Notepad

File Edit Format View Help

```
Date   : 17-08-07 [13:32]                          ITEM GENERAL DATA (SUMMARIZED)
Democompany_550                                      Sorted by       Item Code

-------------------------------------------------------------------------------------------------------------------
            Item                |Description         |Item  |Order |Search    |Search    | Signal Code         | Ite
                                |                    |Type  |System|Key I     |Key II    |                     |
-------------------------------+--------------------+------+------+----------+----------+---------------------+----
              GA                |Control panel       |Purcha|MPS   |CONTROL PA|GA        |                     |
             750                |Control panel       |Purcha|MRP   |CONTROL PB|750       |                     |
             GGG                |Control panel       |Manufa|MPS   |CONTROL PC|GGG       |                     |
            1111                |Box 21"             |Purcha|MRP   |BOX 21"   |1111      |                     |
            FGSD                |                    |Purcha|MRP   |          |FGSD      |                     |
           11690                |test                |Manufa|MPS   |TEST      |11690     |                     |
           12610                |B                   |Manufa|MPS   |MODEL A   |12610     |                     |
           12615                |Model B             |Manufa|MPS   |MODEL B   |12615     |                     |
           12620                |Model C             |Manufa|MPS   |MODEL C   |12620     |                     |
           12625                |Model D             |Manufa|MPS   |MODEL D   |12625     |                     |
           13695                |Generic computer    |Generi|MPS   |GENERIC CO|13695     |                     |
           14650                |Model Cheetah       |Manufa|MPS   |MODEL CHEE|14650     |                     |
           14655                |Model Jaguar        |Manufa|MPS   |MODEL JAGU|14655     |                     |
           14660                |Model Panther       |Manufa|MPS   |MODEL PANT|14660     |                     |
           14665                |Model Tiger         |Manufa|MPS   |MODEL TIGE|14665     |                     |
           14670                |Model Linx          |Manufa|MPS   |MODEL LINX|14670     |                     |
           24780                |Monitor 15" LCD     |Manufa|MRP   |MONITOR 15|24780     |                     |
           24781                |Monitor 21" .32 DPI |Manufa|MRP   |MONITOR 21|24781     |                     |
           25812                |4mb 72pin simm mem 1|Purcha|MRP   |4MB 72PIN |25812     |                     |
```

A report is a ***Standard Baan/ERP Ln Report*** when the following conditions are fulfilled:

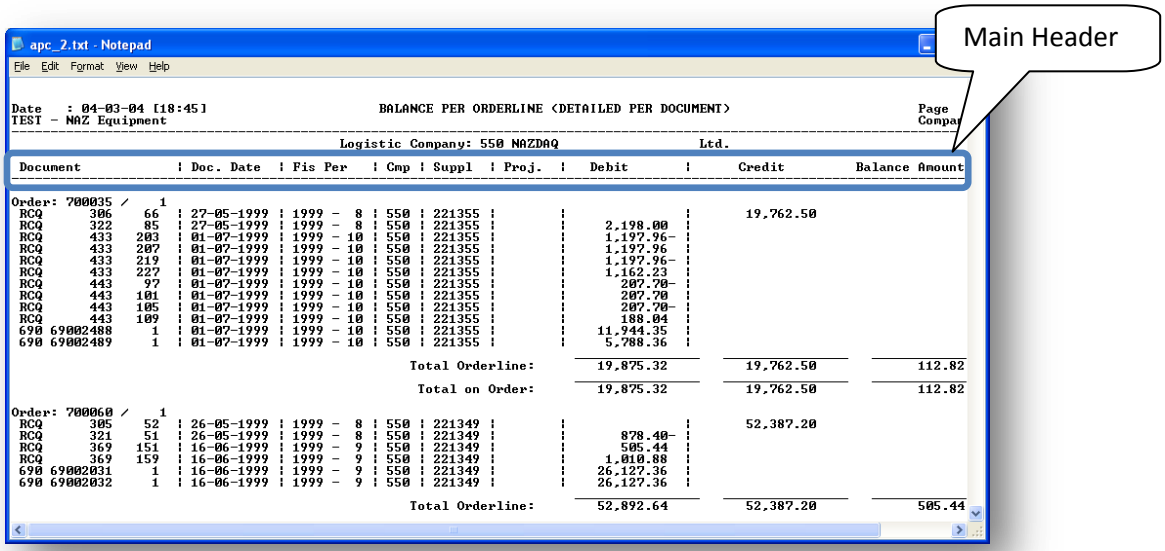
1. The report delimiter is pipe and it appears in the header lines as well as in the detail lines
2. There are two lines of dashes; one before the main header and one after it
3. The main header (as defined here) appears in every page, exactly in the same lines
4. The main header does not contain more than 3 lines (excluding the two dash lines)
5. Columns in report must be aligned, you can see this by looking at the delimiter if it's all the way on the same position, and makes a horizontal line

1.1.2 Tabular – Non-Standard

A report is "Non-standard" if any of the five characteristics of "Standard" reports is not fulfilled. This is also the case when report contains additional data, like another sub-header above the main header, lines inside the tabular data, like sub-headers, totals and subtotals – or when the main header appears in different positions in every page.

In the following example there is more than one reason this report is not standard.

1) Having an extra line above main header
2) **Order number** inside table
3) ***Total Order line*** and ***Total on order*** makes it non-standard

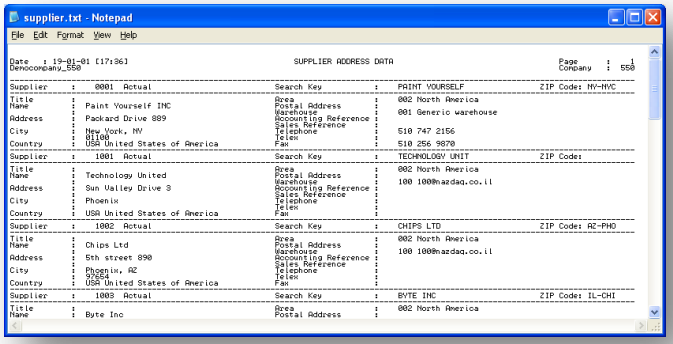


Non Standard reports can be converted to table format, after customizing the output in the ***BRC.***

1.1.3 Transpose

In this report data is represented in rows. A header in the first few lines includes few key fields and the report is organized in such a way that the field name is written in every line, next to the value of that field. There could be up to 3-4 columns in every report with the same pattern.

Example:

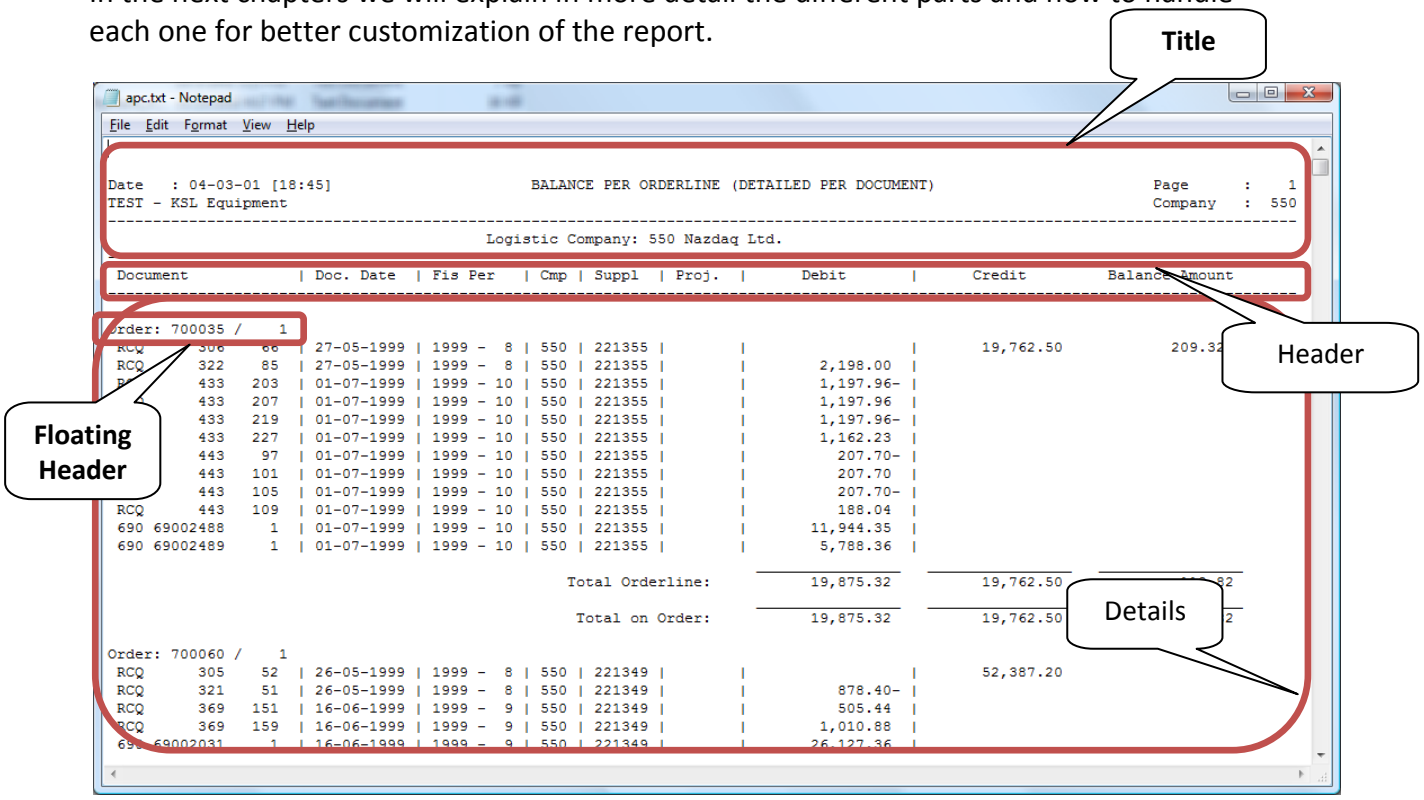


Transpose Reports can be converted to table format, after customizing the output in the ***BRC***.

1.2 Report Parts

A report according to ***BRC*** can be separated into 4 parts: ***Title***, ***Main Header***, ***Details*** and ***Floating Header***.

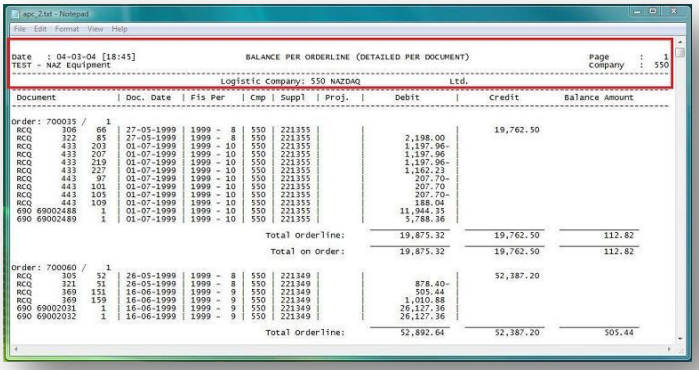
In the next chapters we will explain in more detail the different parts and how to handle each one for better customization of the report.



2 Titles

2.1 Introduction

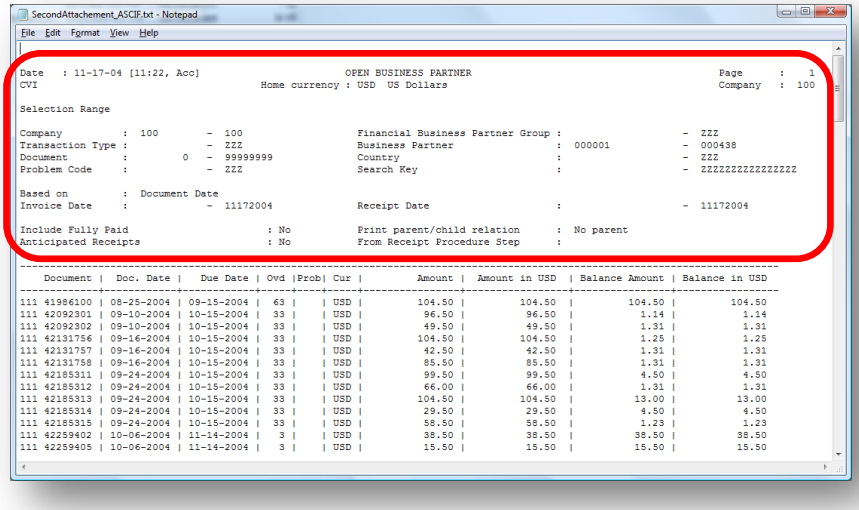
Titles are usually on every page and contain all lines from the start of the first page until the main header's first line. In many cases, the ***BRC*** can recognize the title and automatically remove it from the resulting table.



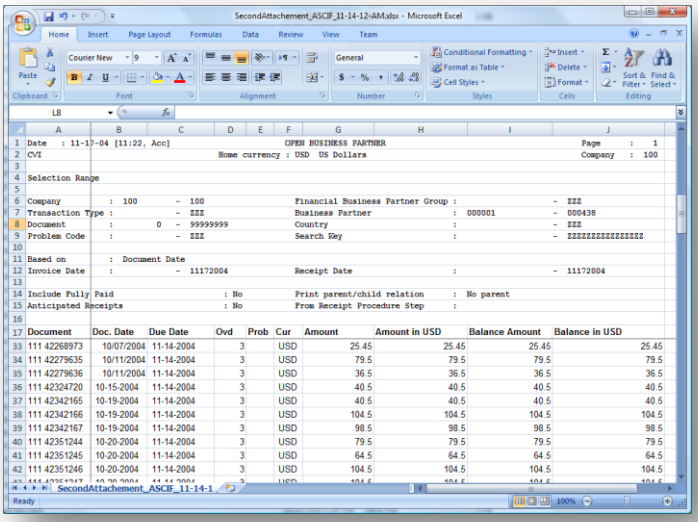
2.2 Keep Text before Header

The title is usually removed from the table result but can be kept if otherwise indicated by the ***BRC***. To keep the title in the resulting data, you can enable "***Keep Text before Header***"

Example:



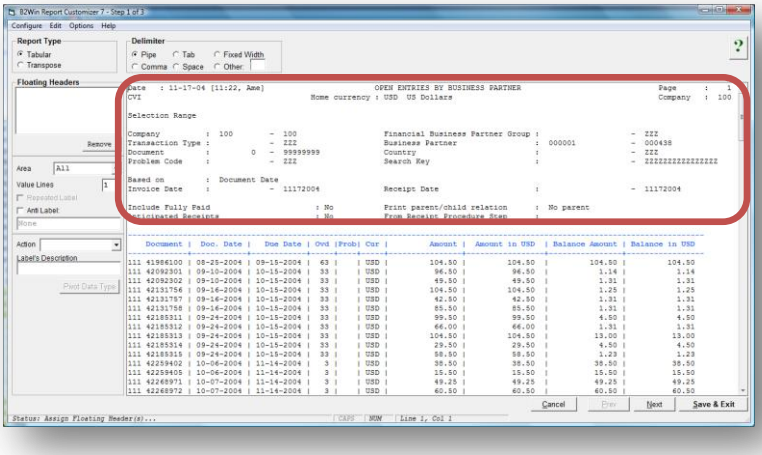
In ***BRC*** menu we click on ***Options*** and enable ***Keep Text before Header***



2.3 First Page with a Cover Sheet

Sometimes, the title appears in the first page only (Cover Sheets) and is not repeated in the same way in pages 2 and more. This can be defined in ***BRC***.

The following is an example:



A standard report with a cover sheet in the first page

We may choose to delete this text or keep it. By default, ***BRC*** will delete it and only detect the columns that contain data.

3 Main Header

3.1 Introduction

Every report has a header that contains the column names which usually appears in every page. ***BRC*** looks for the header and places it once in the resulting table.

Baan uses a default delimiter between columns with the default being the "**|**" (Pipe)
BRC by default looks for this delimiter. With ***RBC***, you can define a different delimiter.

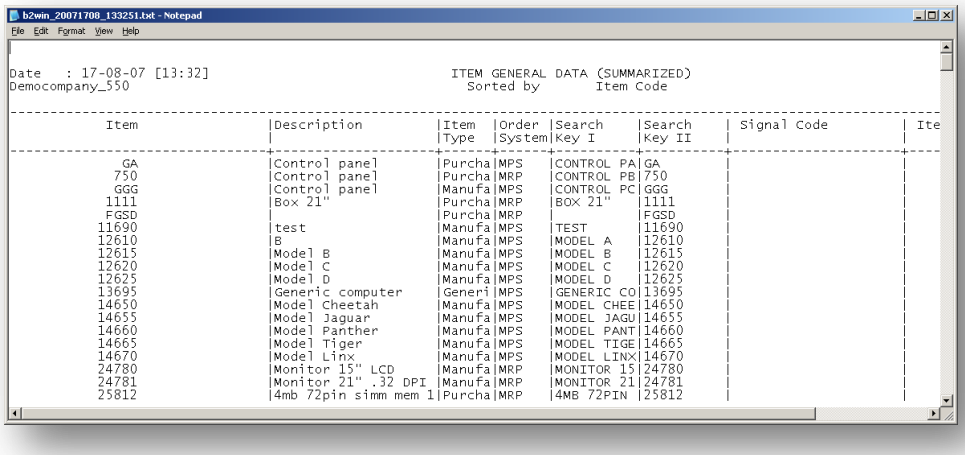
In this chapter we will go over the four kinds of headers that ***BRC*** can handle, and give an example of each one of them.

3.2 Header Types

3.2.1 Standard Header

A report contains a standard Baan header that comes always in the same position in each page of the report.

Example:



When customizing a similar report to this, ***BRC*** will usually auto detects the Main header and marks it in blue.

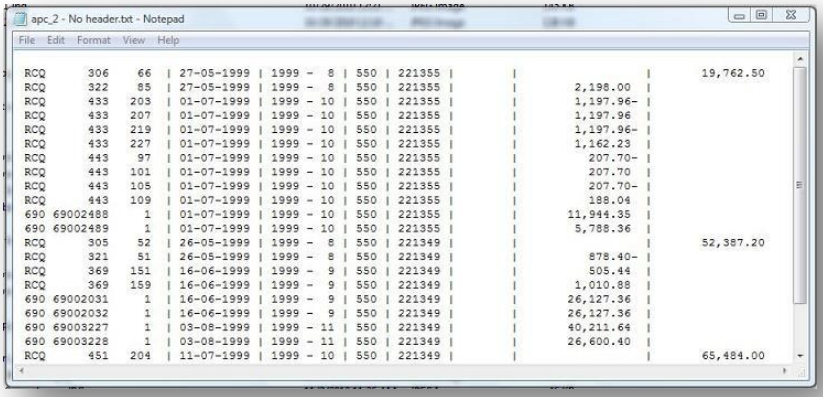
How BRC works:

BRC searches for the first dotted line in the first page and marks it as Main Header for this report. In some cases the first dotted line is not the start of the header and therefore ***BRC*** will wrongly detect it as the main header. In this case, we should specify the Main Header manually.

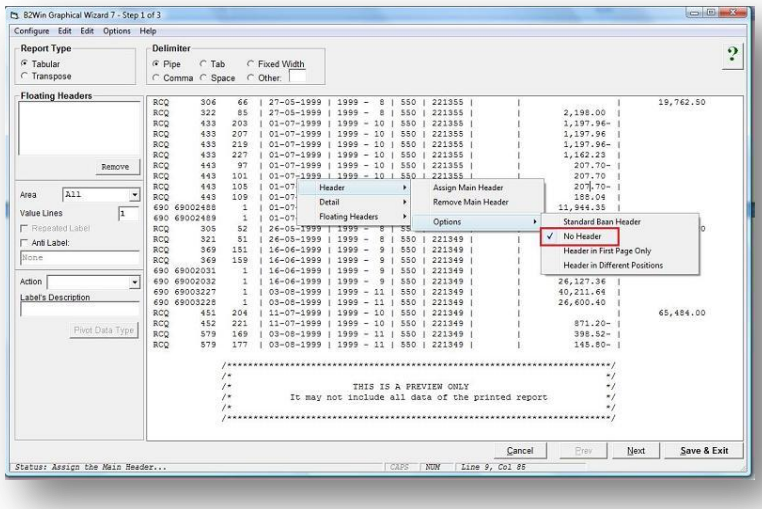
3.2.2 No Header

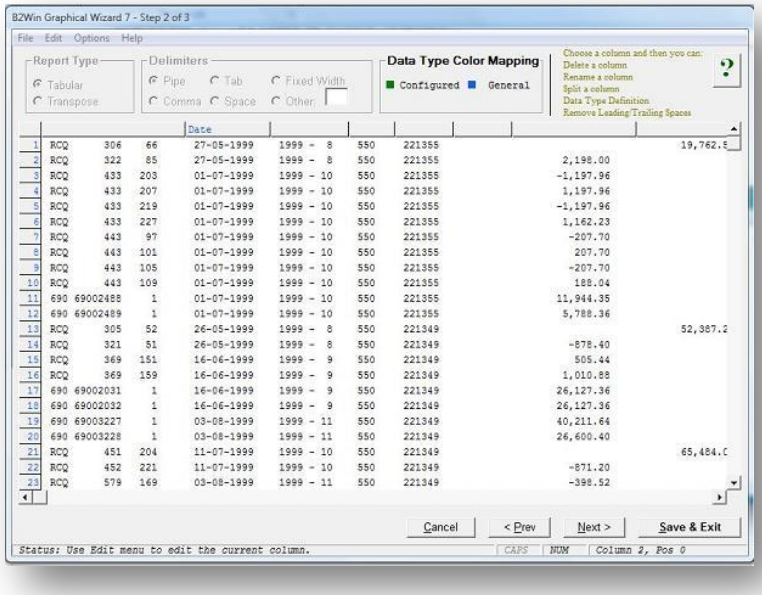
Some reports have data with no header. These are usually customized reports.

Example:



If a report is defined as a “no header” report, ***BRC*** will automatically detect the columns

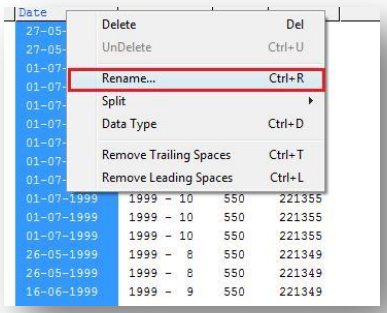




BRC auto detected the columns in step 2

As the report has no header, no columns names exist. We may want to insert column names.

1) Right Mouse Click on the empty Column Name and click on ***Rename***

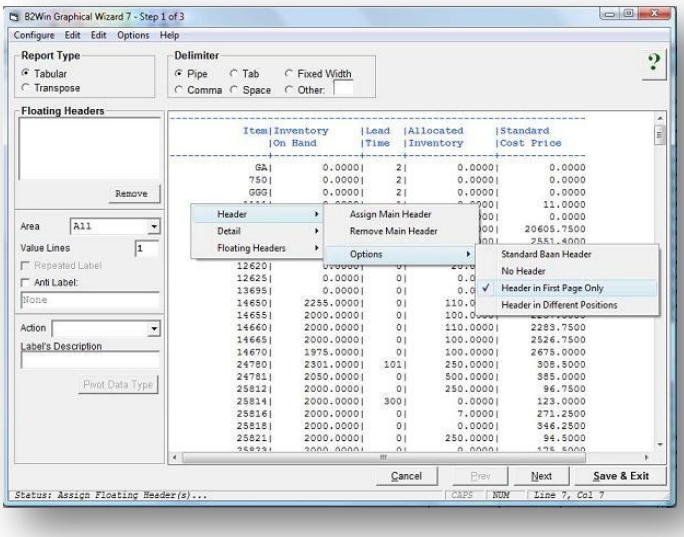


2) Specify a column name

Do the same scenario for the rest of the columns as you chose, to have an organized tabular report

3.2.3 Header in First Page only

If we have a header in the first page only, while other pages contain data with no header, we need to specify this option in ***BRC***:

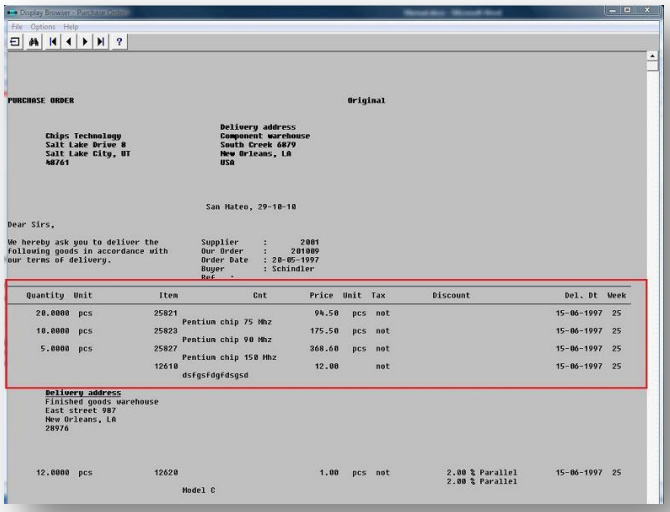


Example of a report that is set to have Header in first page only

3.2.4 Header in Different Positions

Sometimes, the header does not appear in the same location in every page, as in the following example:

In the first page



PURCHASE ORDER Original

Chips Technology
Salt Lake Drive 8
Salt Lake City, UT
48761

Delivery address
Component warehouse
South Creek 6879
New Orleans, LA
050

San Mateo, 29-10-10

Dear Sirs,

We hereby ask you to deliver the following goods in accordance with our terms of delivery.

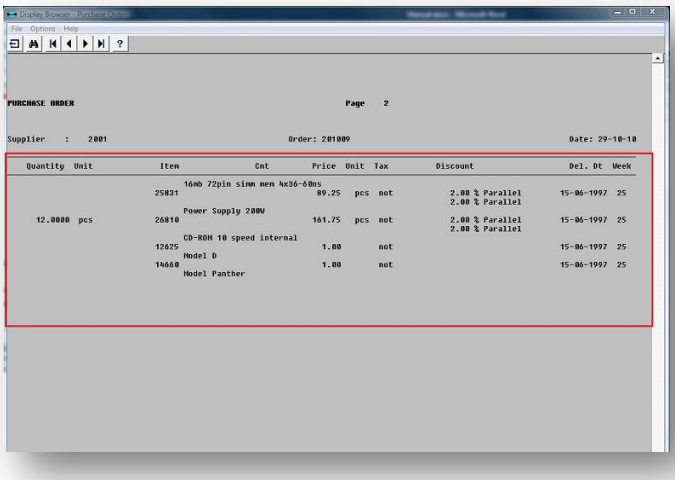
Supplier : 2001
Our Order : 201009
Order Date : 20-05-1997
Buyer : Schindler
Ref. :

Quantity	Unit	Item	Cnt	Price	Unit	Tax	Discount	Del. Dt	Week
20.0000	pcs	25821		94.50	pcs	not		15-06-1997	25
		Pentium chip 75 Mhz							
10.0000	pcs	25823		175.50	pcs	not		15-06-1997	25
		Pentium chip 90 Mhz							
5.0000	pcs	25827		368.60	pcs	not		15-06-1997	25
		Pentium chip 150 Mhz							
		12610		12.00		not		15-06-1997	25
		dsfgsfdgfdsgsd							

Delivery address
Finished goods warehouse
East street 987
New Orleans, LA
28976

12.0000	pcs	12620		1.00	pcs	not	2.00 % Parallel 2.00 % Parallel	15-06-1997	25
		Model C							

In Second Page and after:



PURCHASE ORDER Page 2

Supplier : 2001 Order: 201009 Date: 29-10-10

Quantity	Unit	Item	Cnt	Price	Unit	Tax	Discount	Del. Dt	Week
		16mb 72pin simm mem 4x36-60ns							
		25831		89.25	pcs	not	2.00 % Parallel 2.00 % Parallel	15-06-1997	25
		Power Supply 200W							
12.0000	pcs	26810		161.75	pcs	not	2.00 % Parallel 2.00 % Parallel	15-06-1997	25
		CD-ROM 10 speed internal							
		12625		1.00		not		15-06-1997	25
		Model D							
		14660		1.00		not		15-06-1997	25
		Model Panther							

We need to specify this option to ***BRC*** to detect the headers and data inside it

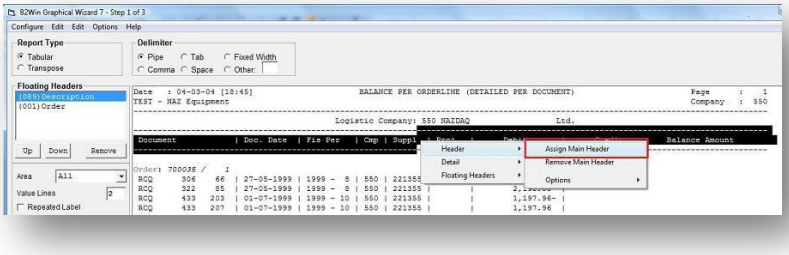
3.3 Usage

3.3.1 Assign Main Header

If the main header is not detected automatically, or if it was mistakenly detected, we can manually specify the ***Main Header*** using ***RBC***.

To set main header:

1) Go to ***BRC*** step 1
2) Mark the header text you want to chose
3) Right Mouse Click on the text and click on: ***Header -> Assign Main Header*** (marked text will be colored in Blue color)



4) To specify what kind of header is that (***Standard Baan header***, ***Header in first page only***, ***Header in different position***) (See ***Header Types*** help Page)

3.3.2 Remove

You can remove ***Main Header*** that you already set:

We assume that there is a Main header set, Click on Menu Item: ***Edit -> Header -> Remove main header.***

4 Detail Lines

4.1 Introduction

Detail lines are mainly handled in ***BRC step 2***, after we have worked on the title, header and floating headers in Step 1. The delimiter is automatically assigned as "|" (Pipe) unless defined differently in Step 1. After the detail lines are generated, different options and special cases for the detail lines can be picked as described in this chapter.

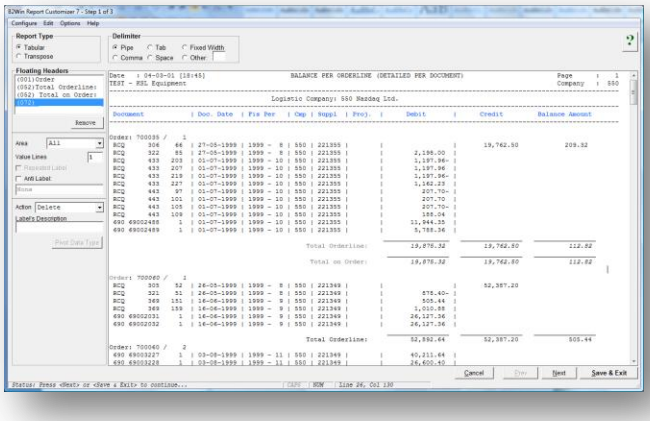


Figure 1 – Step 1

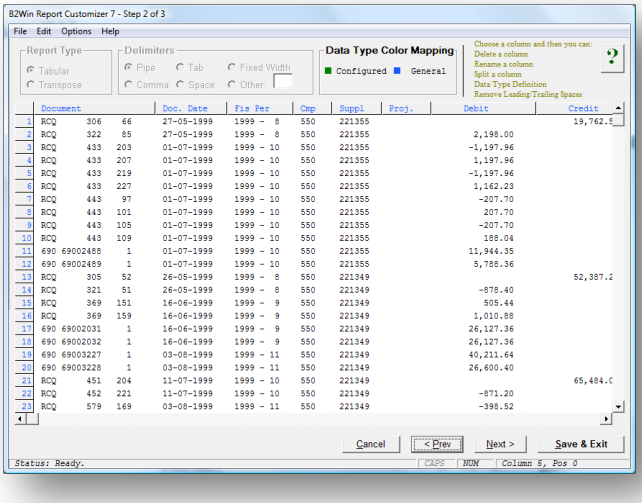
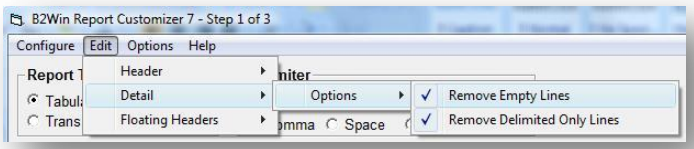


Figure 2 –Step 2 - Detail lines

4.2 Remove empty lines

By default, empty lines are kept in the resulting table. Using ***BRC***, you can specify an option to force deletion of empty lines from report.



4.3 Remove delimiter only lines

By default, empty lines that have the delimiters only (no data) are kept in the resulting table. Using **BRC**, you can specify an option to delete such lines from report.

4.4 Delete columns - Undeleted columns

You can delete any column from the report in ***BRC step 2***. To do this, Right mouse click on the column and click on ***Delete.***

To view the deleted columns: on the menu click on ***Options -> Show Deleted columns.***

Note*: You can't delete columns that are generated from Floating Headers.*

4.5 Data Types

Data Types are guessed by *B2Win* or using the Global Data Dictionary (Review ***B2Win – Implementation Guide*** for more information about Data Dictionary session ***tccom2dd7***). Many times, this is not enough as some columns can have confusing data types. To avoid this, for each column in the report, use ***BRC step 2*** in order to specify an explicit Data Type in order to display it in ***Excel*** output.

Note: *We can't set a data types from* ***BRC step 2*** *for Floating Header Columns. This can be done in step 1 - left pane*

To Set Data Type for a specific column:

1) Right Mouse Click on a column, and select ***Data Type***
2) Select the ***Data Type*** of the value in this column

After we finish this, the title of this column will be colored in Green instead of Blue – which means the data type for this column is now set. In this case ***BRC*** won't try to guess what type this column is.

4.6 Split – With or Without cut

Some reports don't have delimiter between columns or have spaces between columns. *B2Win* cannot split these columns automatically, so user must edit this manually using ***RBC Step 2*****.**

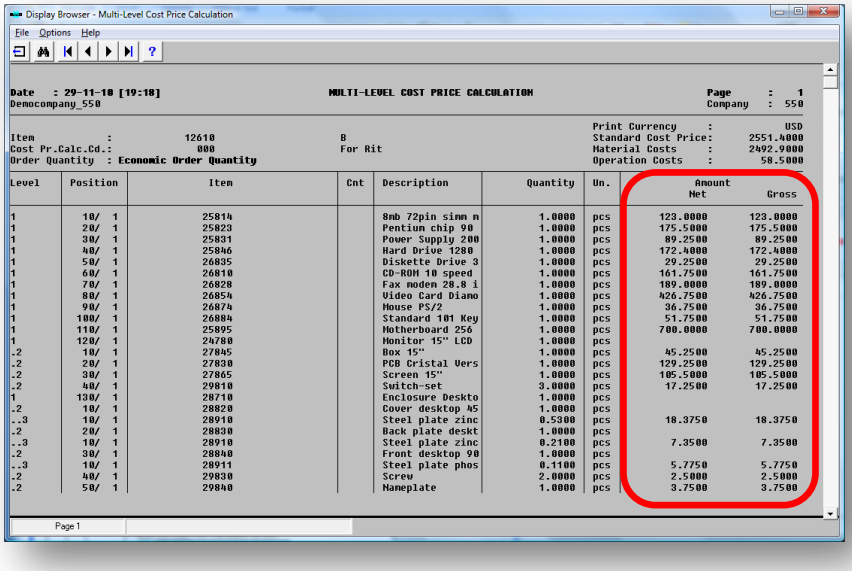
There are two ways of Splitting:

1) ***Standard Split*** – Split a column into two columns, without removing any data from the columns

2) ***Split with Cut*** – Splits two columns while removing the delimiter character (wherever the split bar was clicked)

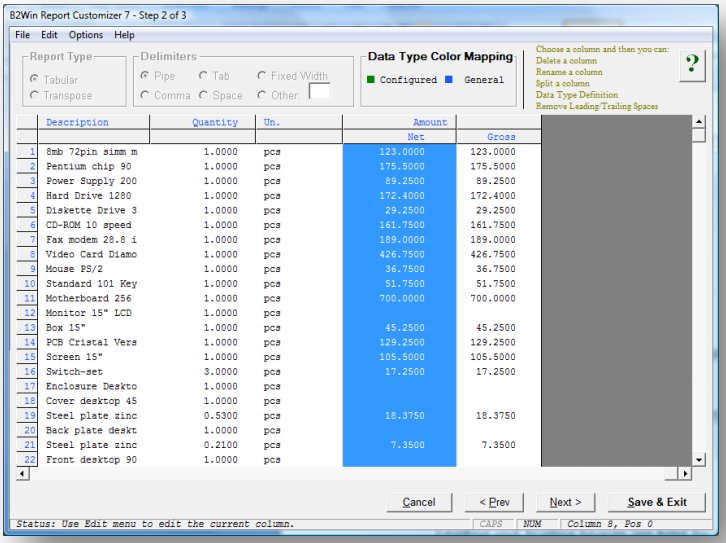
To Split a column to two derived columns:

1) Right Mouse Click on the column, and select: ***Split -> Standard Split***



2) If you pass the mouse cursor on the table you can see a vertical line passing with it, select the place you want to split and click on the mouse left button

3) After you split the two columns you can select each one of them and change its ***data Type***, ***rename column title***



After splitting column to two

4.7 Leading and Trailing Spaces

Leading and Trailing Spaces are kept by default. For each column in table, we can specify these two options:

1) ***Remove Trailing Spaces*** – Spaces after the value will be removed
2) ***Remove Leading Spaces*** – Spaces before the value will be removed

*Note: Option remove trailing and leading spaces are not displayed in the **BRC step 2** - user can only see it when converting the report later on.*

To specify this option on a column:

1) Right Mouse Click on a column and select

   a. ***Remove Trailing Spaces***

b. ***Remove Leading Spaces***

2) On the output file for this column spaces before or after the value won't be displayed, depending on the option you selected

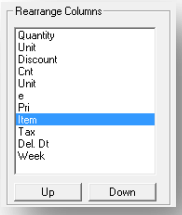
4.8 Rearrange

In ***BRC step 3*** you can re arrange the columns displayed in the resulting table

To do this:

1) In ***BRC step 3***, under Rearrange columns box, click and hold the mouse on the column you want to re arrange
2) Move up/down to where you want it to be displayed

Note: You can also use the two buttons: Up/Down

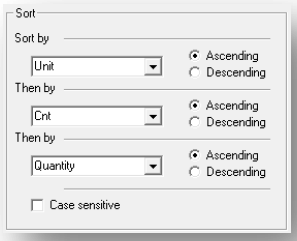


4.9 Sort

You can sort the data in the table by different options using ***BRC step 3***, this will affect the data being displayed sorted in ***Excel*** mode ***only***

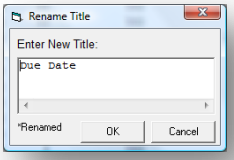
To Activate Sorting:

- ***Sort By***: Sort by three columns at once
- ***Ascend/ Descend***: For each column you want to sort by it, you can specify if ***Ascending*** or ***Descending***
- ***Case Sensitive***: Will cause the data to be sorted into Small and Capital Litters as differenced



4.10 Rename column

Column names can be renamed. You can do this in ***BRC*** step. ***Right mouse click on the column -> select Rename***, change the current name to whatever you specify:

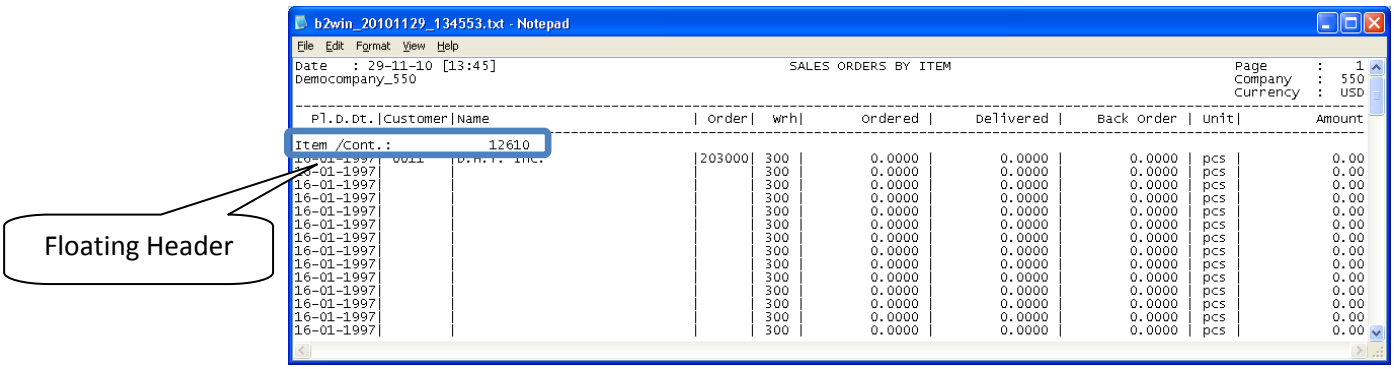


5 Floating Headers

5.1 Introduction

5.1.1 What is Floating Header

Tabular reports may in some cases have data that does not come in the shape of title, header or detail. This is usually sub-headers, sub-titles, sub-totals. All of these entities are defined as "floating headers" in ***RBC*** and need to have special treatment.



5.1.2 Label

Floating headers have two parts: label and value. The label is the string key that ***BRC*** will need in order to recognize the floating header. In the above example, the floating label is "Item /Cont.:"

5.1.3 Value

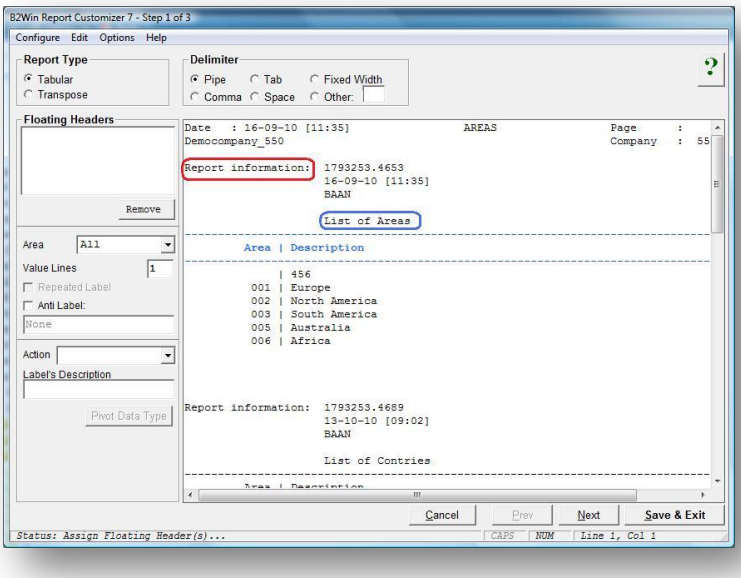
The value of the floating header is the changing field related to the floating header's label. The first value in the example above is "12610" but different values may appear towards the rest of the report.

5.1.4 Relation between Label and Value

The label and value of a certain floating header may appear on the same line. This is the most common use of floating headers.

In more complex scenarios, the label and the value are not next to each other. The rule we need to keep is to have a fixed distance between them, in rows and columns.

Example:



In this report we want the label ***Report information (Marked in Red rectangle)*** to have the value in another line ***(Marked in Blue rectangle)***

1) **Set Floating Label:** We mark ***Report Information*** text and Right mouse click on the marked text and select: ***Floating Headers -> Add Floating Label*** **(Label Text will be underlined)**

2) **Set Floating Header Value:** We mark the ***Value*** text and Right mouse click on the marked text and select: ***Floating Headers -> Add Floating Value (*****Value will be colored in Italic Red)**

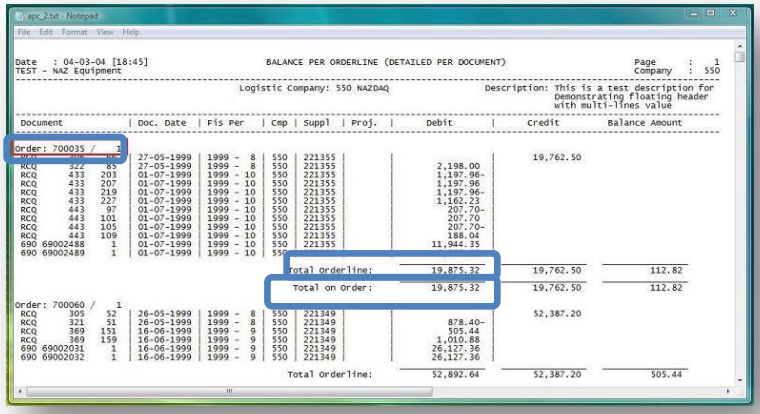
In the following example, the value is always 4 lines under the title and the beginning of value is 21 columns to the left of the beginning of the label.

5.2 Floating Header Types

5.2.1 One-Line Floating header

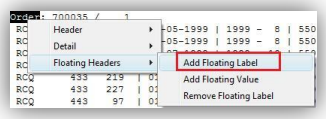
This floating header has the label and value on the same line. This is the common type of floating headers.

The following example has at least 3 floating headers – all one-line floating headers:

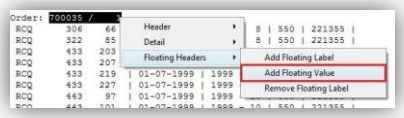


In this report we want to put the ***Order*** label into a column on the main table we have for the report

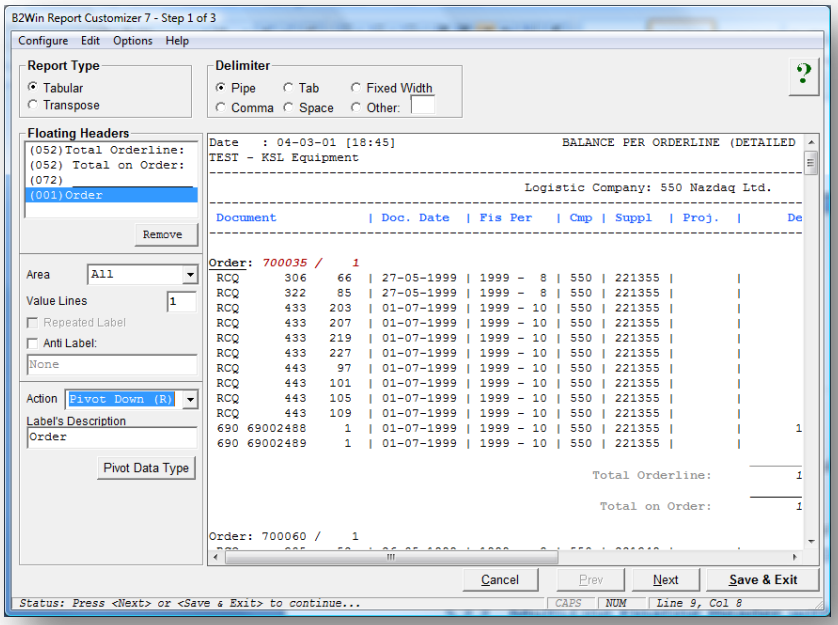
1) **Set Floating Label:** We mark ***Order*** text and Right mouse click on the marked text and select: ***Floating Headers -> Add Floating Label*** **(Label Text will be underlined)**



2) **Set Floating Header Value:** We mark the ***Value*** text and Right mouse click on the marked text and select: ***Floating Headers -> Add Floating Value*** **(Value will be colored in Italic Red)**

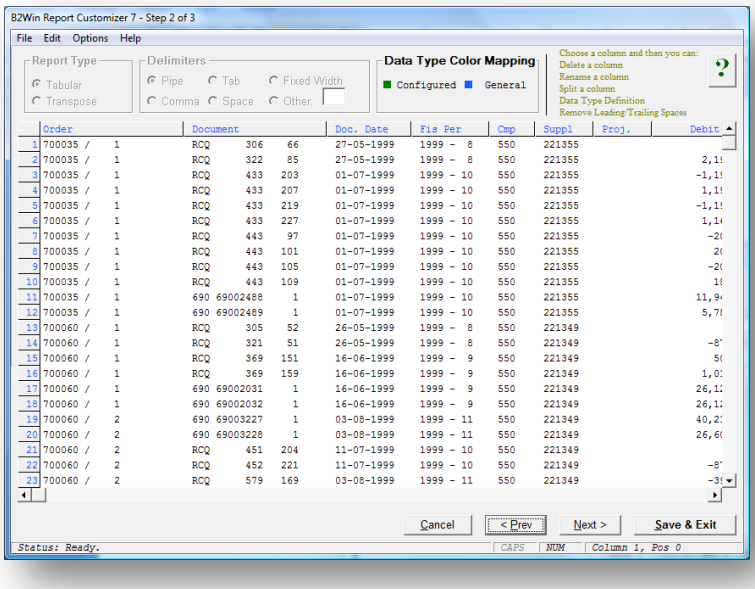


After Label and value are set correctly the following screen appear:



Floating header of one line value (we specify action Pivot Down (R), we will review this in the coming sections)

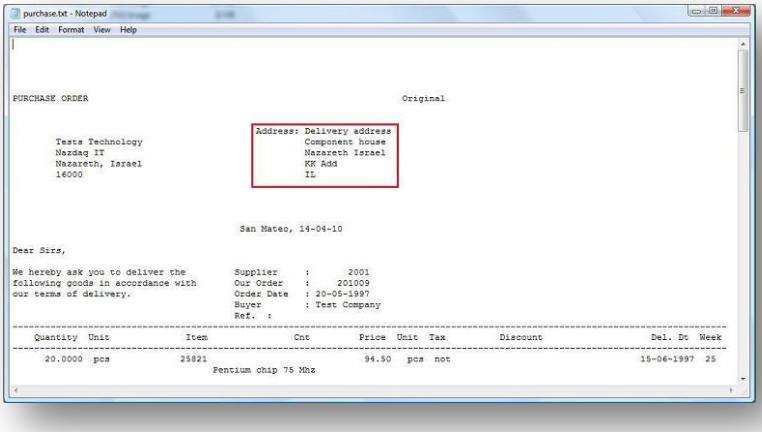
In ***BRC Step 2*** we can see a column named Order



5.2.2 Multi-Line Floating Header with Single Label

A floating header may contain a multi-line value for a label.

Example:

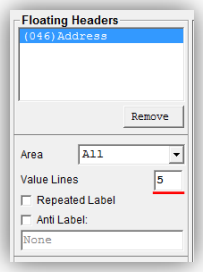


In this report "***Address"*** *is* the label while the value is located in 5 lines.

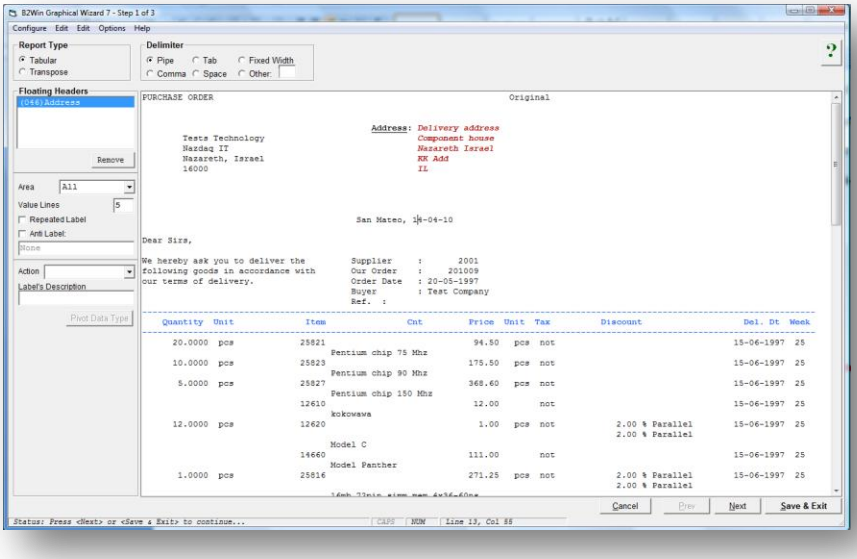
1) **Set Floating Label:** We mark ***Address*** text and Right mouse click on the marked text and select: ***Floating Headers -> Add Floating Label*** **(Label Text will be underlined)**

2) **Set Floating Header Value:** We mark the first line of the ***Value*** text and Right mouse click on the marked text and select: ***Floating Headers -> Add Floating Value (*****Value will be colored in Italic Red)**

3) **On the left panel:** Select the floating header we created, and insert ***Value Lines:*** **5 (The 5 Lines of the value will be colored in Italic Red)**



After Label and value are set correctly, the following appears

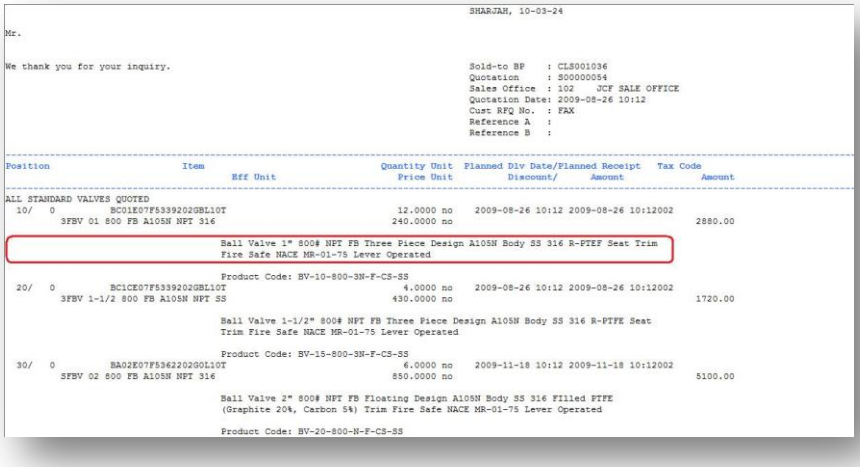


Floating header with multi lines value specified, ***BRC*** mark value lines in red

5.2.3 Multi-Line Floating Header with Repeated Label

A different type of floating header is the one where the label is repeated in every line, next to the value, and we have a variable number of lines for this floating header.

Example:



Report having floating header with repeated label

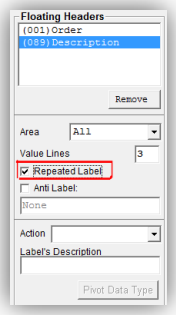
In this report we have text that appears for every line item. The number of lines for each text is variable. We define here a floating header with repeated label of ***spaces***.

1) **Set Floating Label:** We mark the first ***Spaces*** text and Right mouse click on the marked text and select: ***Floating Headers -> Add Floating Label*** **(Label spaces will be underlined)**

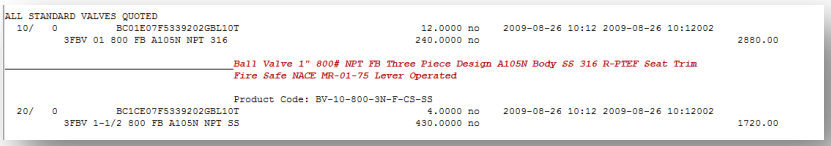
2) **Set Floating Header Value:** We mark the first line of the ***Value*** text and Right mouse click on the marked text and select: ***Floating Headers -> Add Floating Value*** **(Value will be colored in Italic Red)**

3) **On the left panel:** Select the floating header we created, and insert the maximum number of lines for this label. ***Value Lines:*** **2 (The 2 Lines of the value will be colored in Italic Red)**

4) **Select repeated Option:** On the left panel select the floating header we created and check ***Repeated Label***



After Label and value are set correctly: You can set ***Floating Header Options*** for this floating header

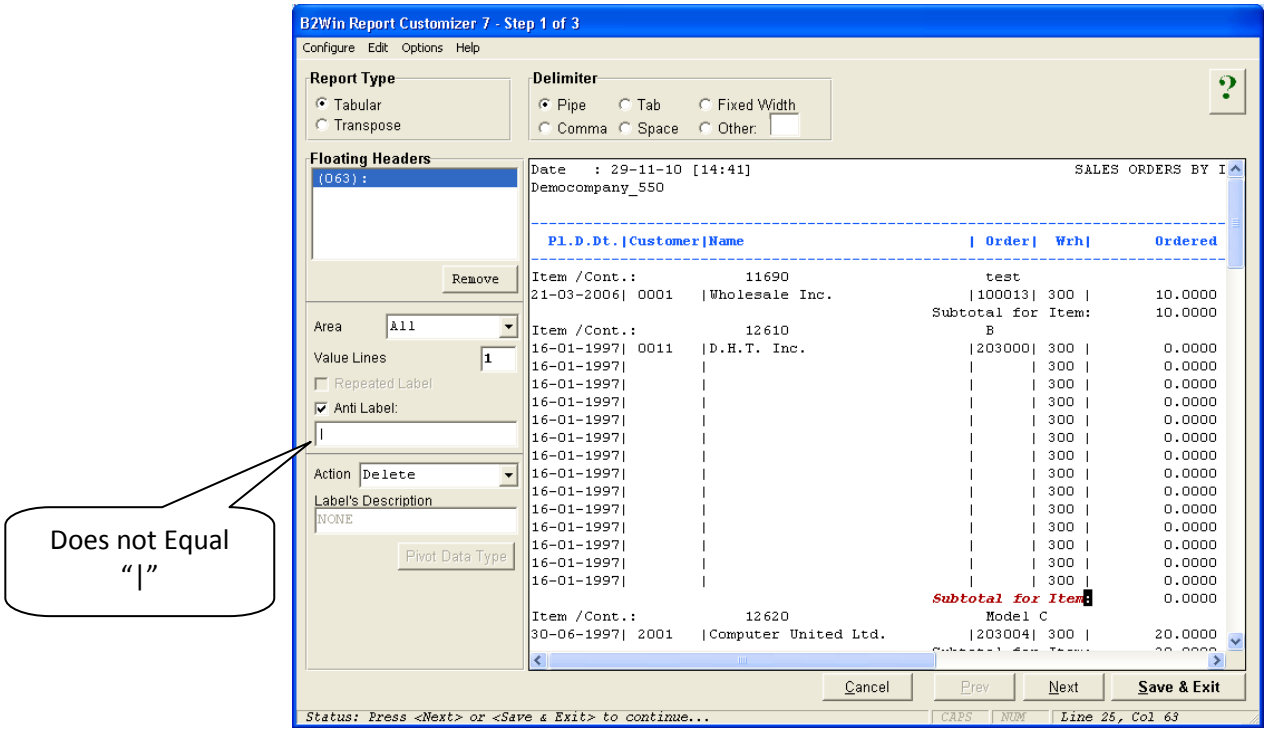


Floating header with multi lines value specified, and repeated label option checked

5.2.4 Floating Header with Anti-Label

Sometimes, it is hard to define a label for a floating header and it is easier to define an anti-label, which means, that when label does not equal to a specific term, recognize this as a floating header.

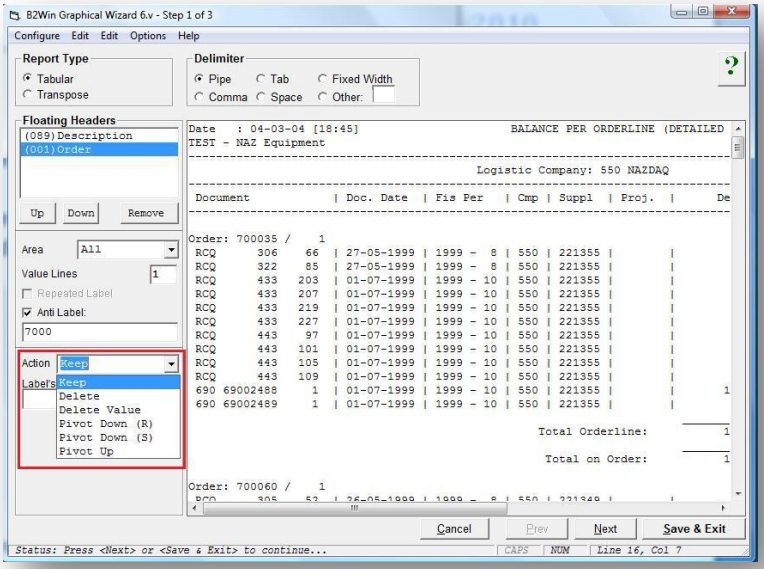
The following is an example:



By defining the ":" as a floating label from type "anti-label" that does not equal to "|", all lines that do not contain "|" in this specific column (Column 52) will be deleted.

5.3 Actions on Floating Headers

After we have defined our floating headers properly, we decide the action we want to perform on the floating header.



5.3.1 Keep

We use this option when we wish to keep the floating header (Label and value) in the same place it appears.

5.3.2 Delete

When this option is specified the label and value of the floating header will be removed from all report pages

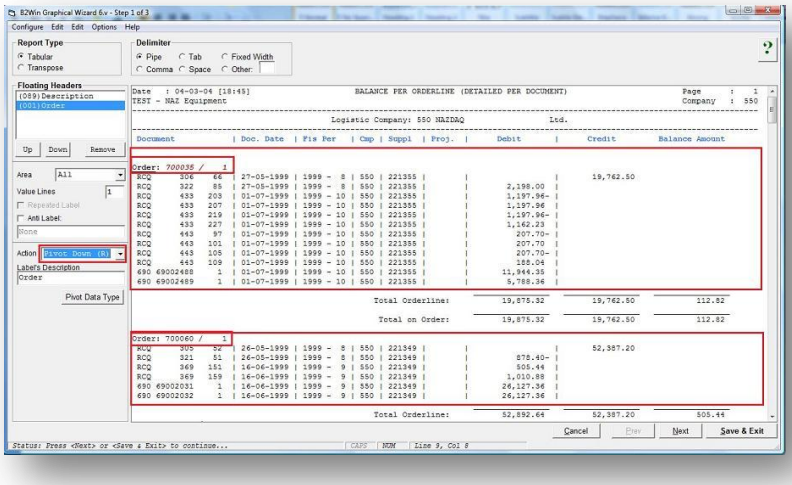
5.3.3 Delete Value

This option keeps the label wherever it appears in the original report, but deletes the specified value in all its instances.

5.3.4 Pivot Down (R)

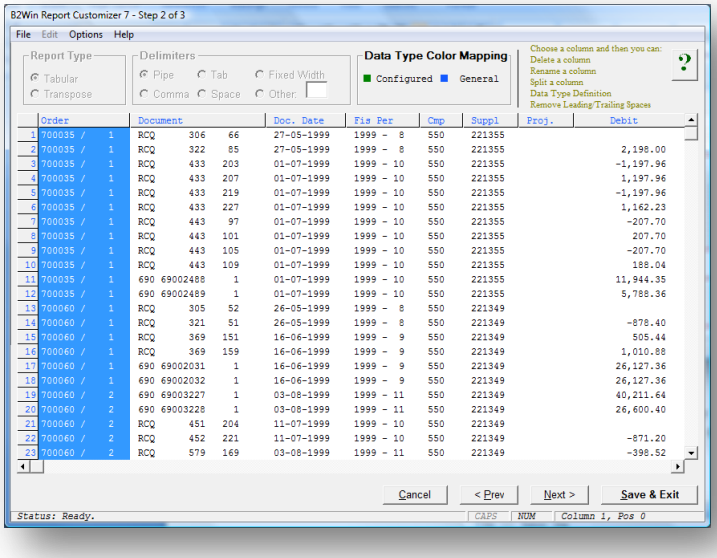
When we specify the option of Pivot Down R (Repeated), the floating header value will be repeated for all rows that appear after the floating header.

Example:



On the first rectangle for every row, ***Order*** value will be repeated and the same thing for the second rectangle

In ***BRC step 2***:

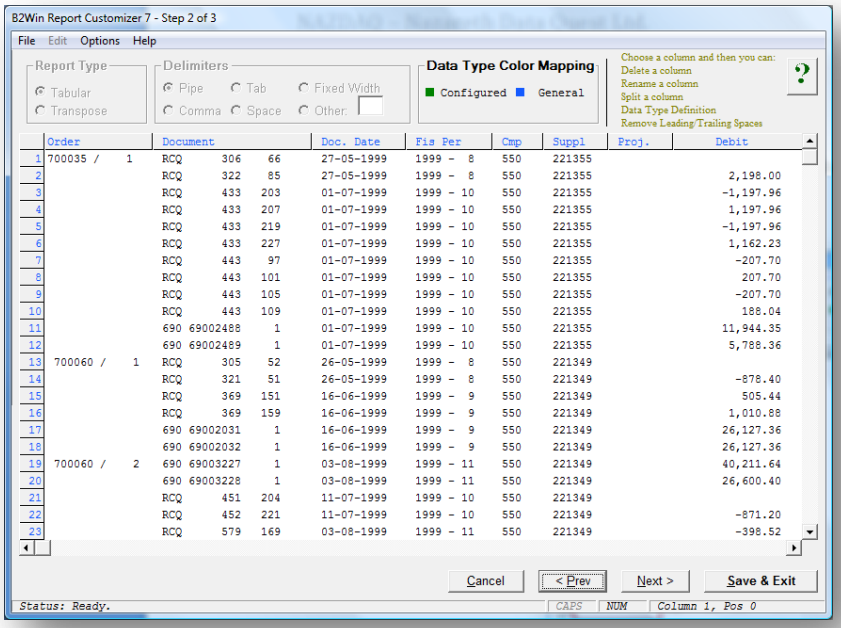


Here we see that ***Order*** appears in every row with the same value, until another ***Order*** value is found in report

5.3.5 Pivot Down (S)

When Pivot down S (Single), the value will be assigned to the rows that appear after the floating header, but will be repeated only on the first row for detail lines coming after as seen in the following (Same report like 5.3.4)

Example from step 2 of the **BRC**:

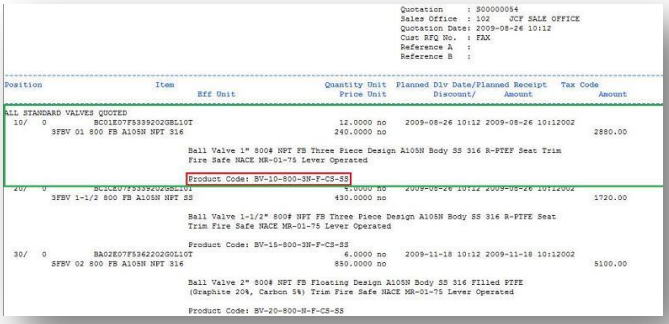


	Order	Document		Doc. Date	Fis Per	Cmp	Suppl	Proj.	Debit
1	700035 / 1	RCQ	306 66	27-05-1999	1999 - 8	550	221355		
2		RCQ	322 85	27-05-1999	1999 - 8	550	221355		2,198.00
3		RCQ	433 203	01-07-1999	1999 - 10	550	221355		-1,197.96
4		RCQ	433 207	01-07-1999	1999 - 10	550	221355		1,197.96
5		RCQ	433 219	01-07-1999	1999 - 10	550	221355		-1,197.96
6		RCQ	433 227	01-07-1999	1999 - 10	550	221355		1,162.23
7		RCQ	443 97	01-07-1999	1999 - 10	550	221355		-207.70
8		RCQ	443 101	01-07-1999	1999 - 10	550	221355		207.70
9		RCQ	443 105	01-07-1999	1999 - 10	550	221355		-207.70
10		RCQ	443 109	01-07-1999	1999 - 10	550	221355		188.04
11		690	69002488 1	01-07-1999	1999 - 10	550	221355		11,944.35
12		690	69002489 1	01-07-1999	1999 - 10	550	221355		5,788.36
13	700060 / 1	RCQ	305 52	26-05-1999	1999 - 8	550	221349		
14		RCQ	321 51	26-05-1999	1999 - 8	550	221349		-878.40
15		RCQ	369 151	16-06-1999	1999 - 9	550	221349		505.44
16		RCQ	369 159	16-06-1999	1999 - 9	550	221349		1,010.88
17		690	69002031 1	16-06-1999	1999 - 9	550	221349		26,127.36
18		690	69002032 1	16-06-1999	1999 - 9	550	221349		26,127.36
19	700060 / 2	690	69003227 1	03-08-1999	1999 - 11	550	221349		40,211.64
20		690	69003228 1	03-08-1999	1999 - 11	550	221349		26,600.40
21		RCQ	451 204	11-07-1999	1999 - 10	550	221349		
22		RCQ	452 221	11-07-1999	1999 - 10	550	221349		-871.20
23		RCQ	579 169	03-08-1999	1999 - 11	550	221349		-398.52

Pivot Repeated for first of detail raw only.

5.3.6 Pivot Up

When Pivot Up is used, the value will be assigned to the rows that appear before the floating header, but will be repeated only on the last row for detail lines coming after as seen in the following example report:



Quotation : S00000054
Sales Office : 102 JCF SALE OFFICE
Quotation Date: 2009-08-26 10:12
Cust RFQ No. : FAX
Reference A :
Reference B :

Position	Item	Eff Unit	Quantity Unit / Price Unit	Planned Dlv Date/Planned Receipt / Discount/	Tax Code / Amount	Amount
ALL STANDARD VALVES QUOTED						
10/ 0	BC01E07F9339202GBL10T		12.0000 no	2009-08-26 10:12 2009-08-26 10:12002		
	3FBV 01 800 FB A105N NPT 316		240.0000 no			2880.00
		Ball Valve 1" 800# NPT FB Three Piece Design A105N Body SS 316 R-PTEF Seat Trim Fire Safe NACE MR-01-75 Lever Operated				
		Product Code: BV-10-800-3N-F-CS-SS				
20/ 0	BC12E07F9339202GBL10T		4.0000 no	2009-08-26 10:12 2009-08-26 10:12002		
	3FBV 1-1/2 800 FB A105N NPT SS		430.0000 no			1720.00
		Ball Valve 1-1/2" 800# NPT FB Three Piece Design A105N Body SS 316 R-PTFE Seat Trim Fire Safe NACE MR-01-75 Lever Operated				
		Product Code: BV-15-800-3N-F-CS-SS				
30/ 0	BA02E07F9342202GOL10T		6.0000 no	2009-11-18 10:12 2009-11-18 10:12002		
	3FBV 02 800 FB A105N NPT 316		850.0000 no			5100.00
		Ball Valve 2" 800# NPT FB Floating Design A105N Body SS 316 Filled PTFE (Graphite 20%, Carbon 5%) Trim Fire Safe NACE MR-01-75 Lever Operated				
		Product Code: BV-20-800-N-F-CS-SS				

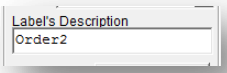
In this example we want ***Product Code*** label to be related to the upper data that is marked in Green, so we use the Option: ***Pivot Up*** here.

In every instance of ***Product Code*** label, it will be auto related to the upper data of it.

5.3.7 Rename

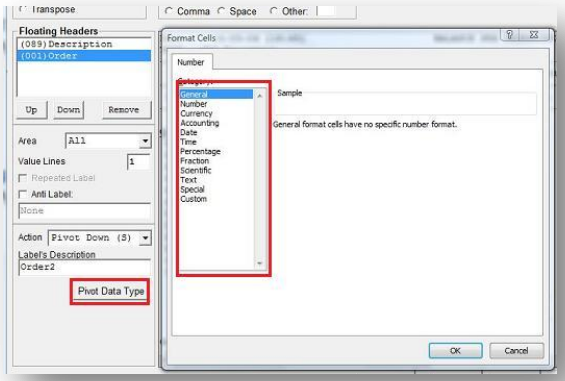
As many times the floating header label will become a title in the resulting table, we have the possibility to rename it to a more meaningful name.

Note: You can only rename ***Column name description*** from ***Step 1***, in ***Step 2*** you do not have the possibility to rename pivoted columns.



5.3.8 Change Data Types

Using this option we can force certain data types for values that will be pivoted into Excel, instead of relying on the automatic data type assigning.



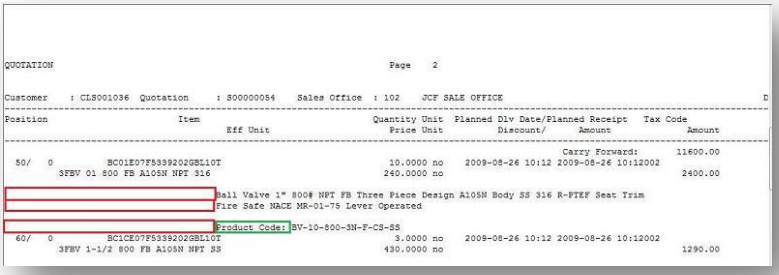
5.4 Additional Options

5.4.1 Priority

We may have multiple floating headers in one report. To avoid conflict and one floating header "winning" over the other, we can assign a Priority for a Floating Header in a report, that cause ***BRC*** to search for the highest priority first – before it handles the lowest priority floating headers

In this example, ***Red*** rectangle mark the first label, ***Green*** rectangle is the second label

We see that in the second (***Green***) rectangle, also the first (***Red***) label also answer the same pattern, but our desire is that the green label to be parsed and processed first.



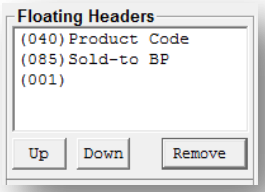
To do this in ***BRC***:

1) Mark the first Floating Header Label (In example the one marked in ***Red***), and mark the value

2) Mark the second Floating Header (In Example the one marked in ***Green***), and its value

3) To Activate Floating Header Priority, go to: ***Options -> Enable Floating Label Priority***

4) A new two buttons displayed under ***Floating Headers*** box on the left side pane, select the Floating Header you want to raise its priority.



5) Click on ***Up*** button, to place it on the right priority according to your needs

6) You can also lower priority using ***Down*** button

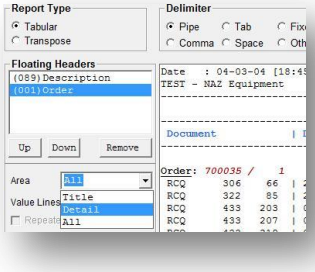
*Note: If you **enable Floating Label Priority** option it will be enabled for all floating headers set inside this report.*

5.4.2 Area

Floating Headers may appear in every part of the report, but we may wish to limit it to a certain part only, in order to avoid conflict.

When selecting a floating header under ***Floating Headers*** table, you can select the part where this floating header should appear in the report:

All – In all the report
Title – Only in the title (See ***Report Parts -> Title***)
Detail – Only in the details area (See ***Report Parts -> Details***)



If we set a floating header to be in ***Detail,*** and there is a certain match for it in inside the ***Title*** area, ***BRC*** won't parse it when it sees it in the title at all.

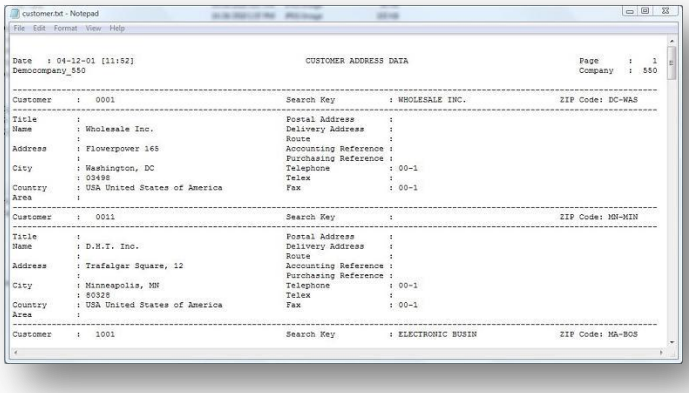
5.4.3 Keep rest of Floating Line

By default, all characters outside the floating header label and value that are on the same line where the floating header is active will be automatically be deleted in the resulting table. When this option is set, these values will be kept.

6 Transpose Reports

6.1 Introduction

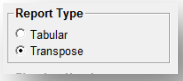
Some reports are line reports (the data is not in columns) and need to be converted to ***Excel*** as columns, as in the following example:



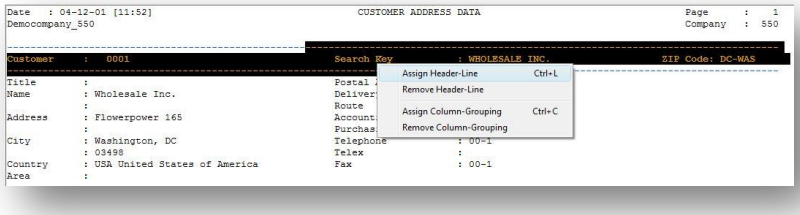
To configure this report in ***BRC***:

1) In *BRC* window select ***Report Type: Transpose***
   Note: If we set Transpose Type, if you have set Floating Headers before, they will be removed

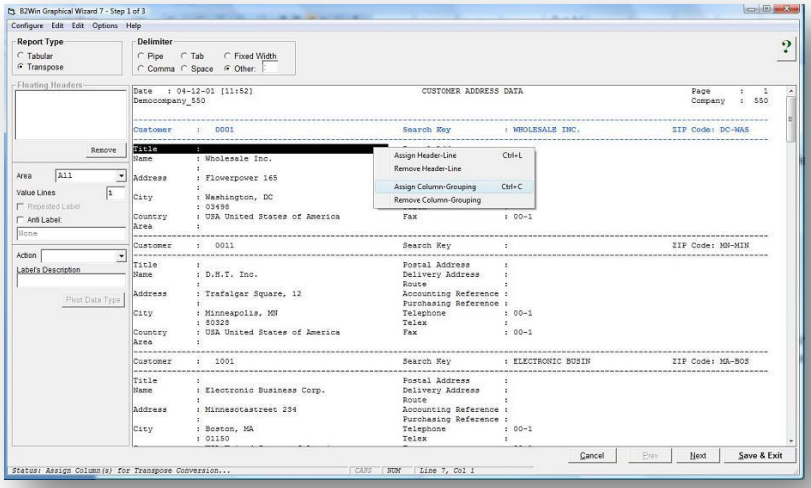
   The default delimiter for such reports is ***":"*** – but it can be changed



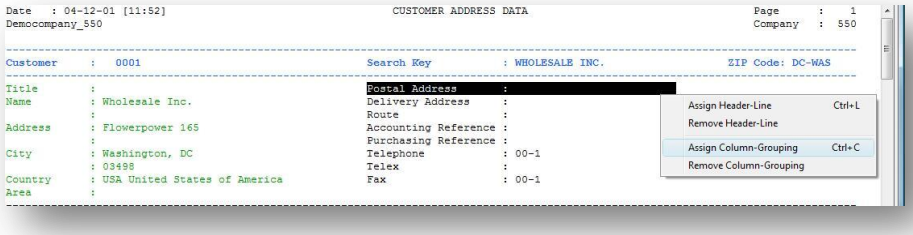
2) After that, you need to select the first line of data (including the dash-line) and assign it as the ***Header-Line*** (usually it is automatically selected)



3) In the following example, you can see that in one line there should be three columns, thus you should group part of the line as a column, and then all the lines underneath will be grouped automatically (the first 9 lines will be colored, but all the data will be converted).



Assign the first column grouping

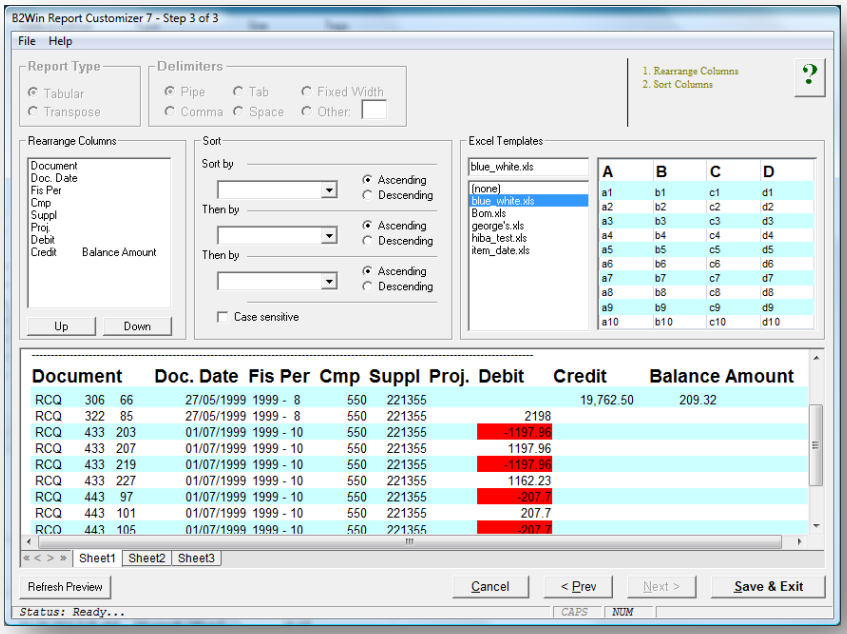


Assign the second column grouping

4) After you finish assigning all the parts, click on ***Next***. In this next step you can rename and delete any column you want and define data types (Split is not available in Transpose). When you are finished, click on ***Save and Exit***.

7 Templates

B2Win Report Customizer can assign Excel Template to the report after it has been customized into a table, ready to go to Excel. Templates can be loaded from the server or from local directory on your computer



Example of setting a template:

1) On ***BRC step 3***, select a template from the list *Excel Templates*
2) To Refresh preview click on the button Refresh Preview on the left bottom of the screen

   Note: In order to use your pre made Template:

   1) Click on ***File -> Get Local Templates***
   2) Browse for an Excel template that you created

Note: If you specify a template from your local directory, it is better to choose a shared directory, if you wish for this template to be available for the rest of the users of the customization.

8.0 Legal Notice and addresses

Warning

By installing this demo version, you are licensing this software for an initial thirty (30) day evaluation period only.

To receive a copy of the full ***NAZDAQ*** license agreement, please contact: info@nazdaq-it.com.

Special Requirements

Excel & Word features require Office 2000 and higher. PDF feature requires Acrobat Reader 5.0 and higher

Trademarks

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NAZDAQ

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Check our WEB site for other Baan and ERP Ln related products: http://www.nazdaq-it.com

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