

Create a Tabular Report with InfoMaker

Purpose

Use this procedure to create a basic report in InfoMaker.

Trigger

You need to obtain data not available through HUDINI reports.

Prerequisites

- You must have InfoMaker version 6.0 or higher and security software installed on your computer.
- You must have a Data Warehouse user name and password.

Navigator Path

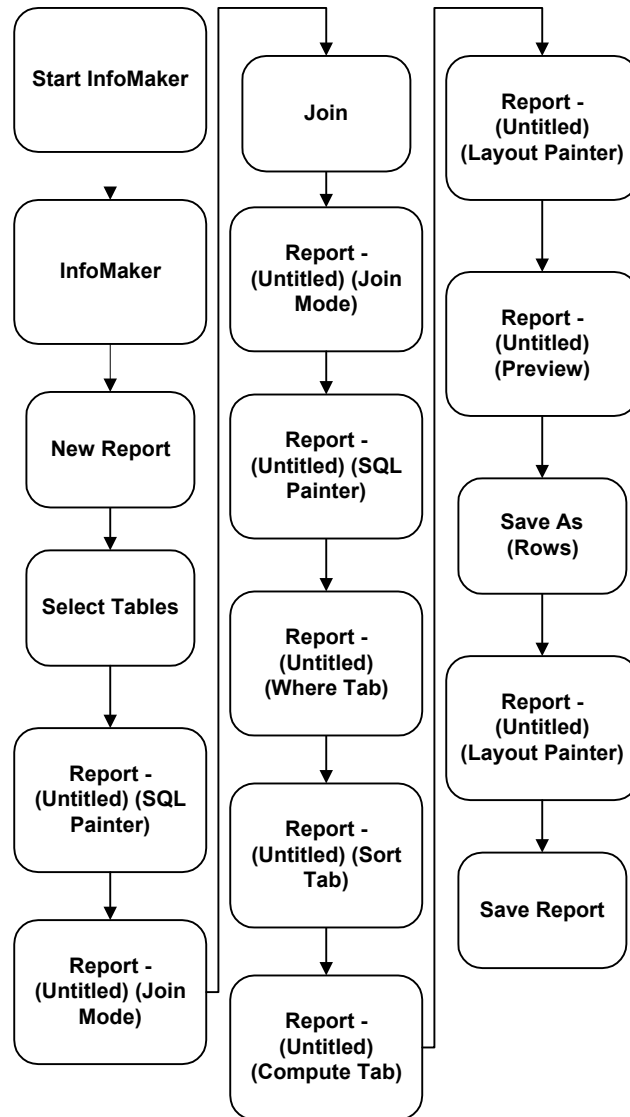
PC Desktop

- Start
 - Programs
 - Powersoft
 - InfoMaker 6.0
 - InfoMaker 6.0 32-bit

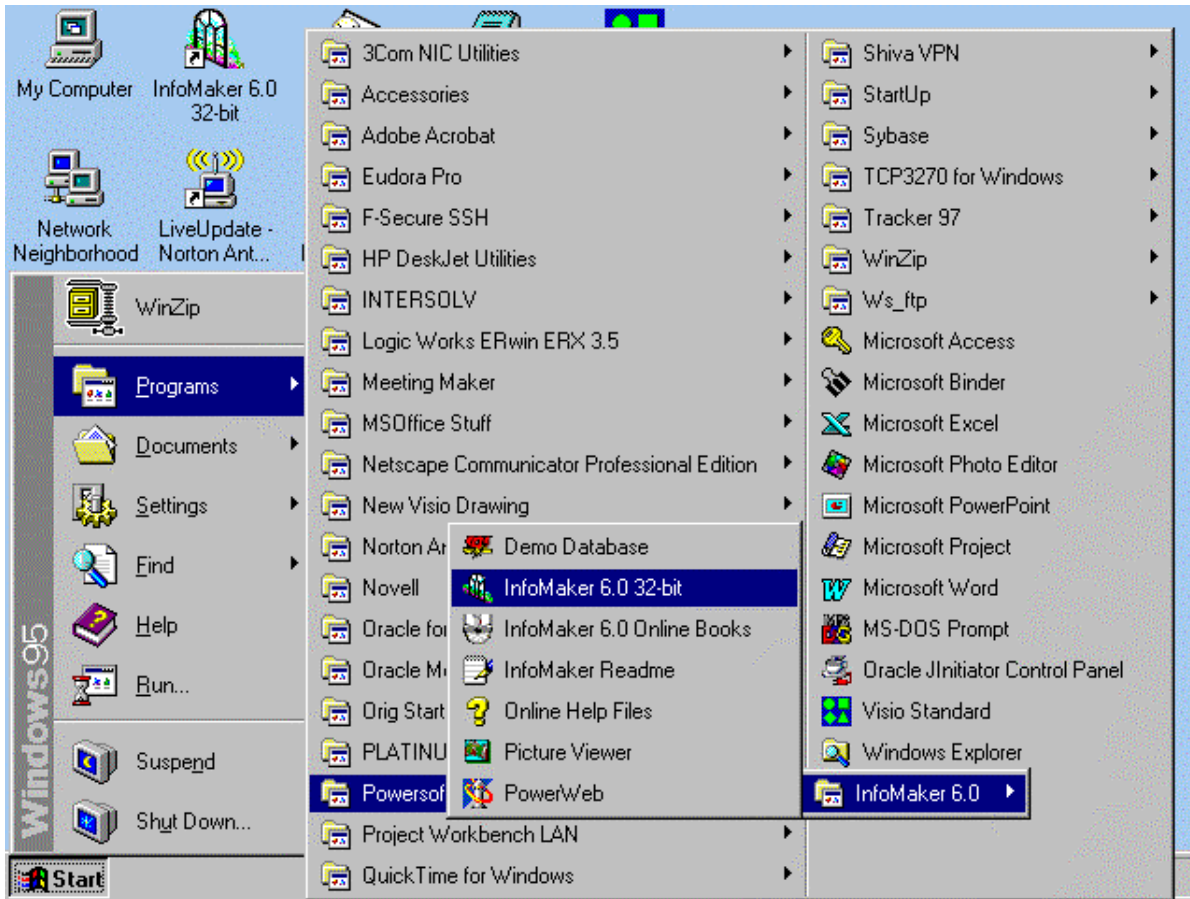
Helpful Hints

- Refer to the work instruction "View Sample Data for a Table" if you only want to look at sample data.

Screens to Use



Start InfoMaker



Start InfoMaker

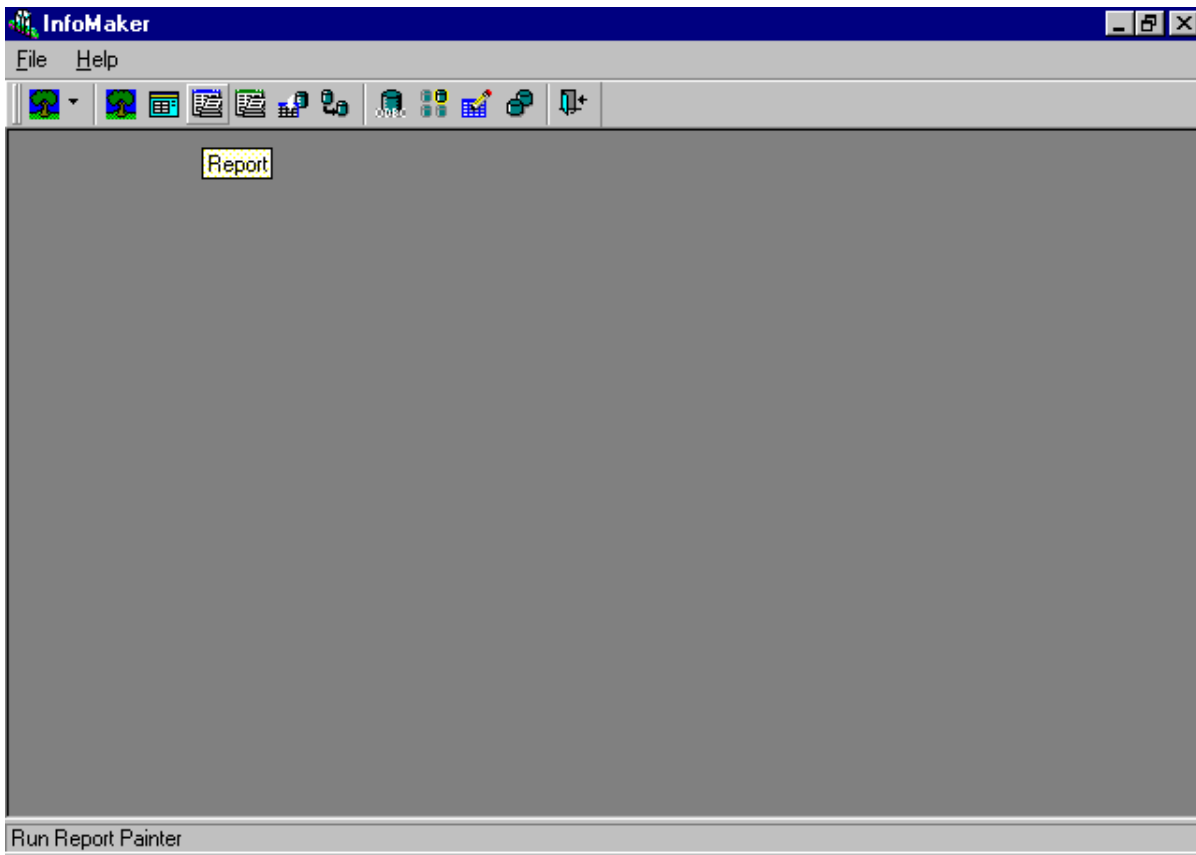
1. Click  Start.
2. Select **Programs** → **Powersoft** → **InfoMaker 6.0** → **InfoMaker 6.0 32-bit** to go to the *InfoMaker* screen.





If your shortcut to InfoMaker was placed in a different folder, this path will be different.



InfoMaker

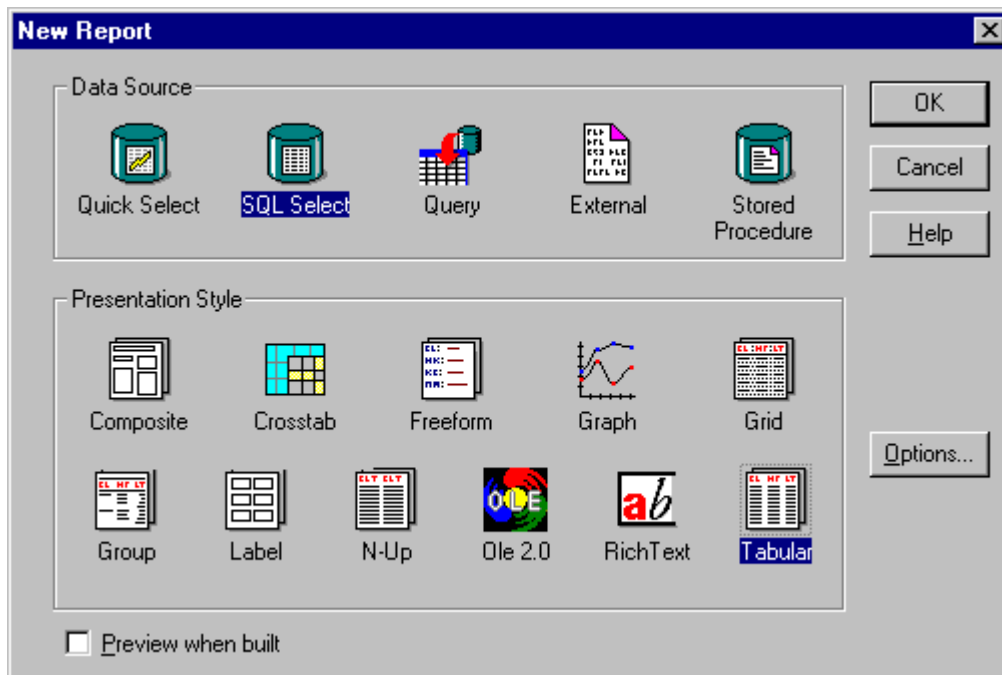


Start the Report Painter


3. Click  to start the Report Painter and display the *Select Report* screen.
4. Click  to create a new report and display the *New Report* screen.





New Report




Select Data Source and Presentation Style

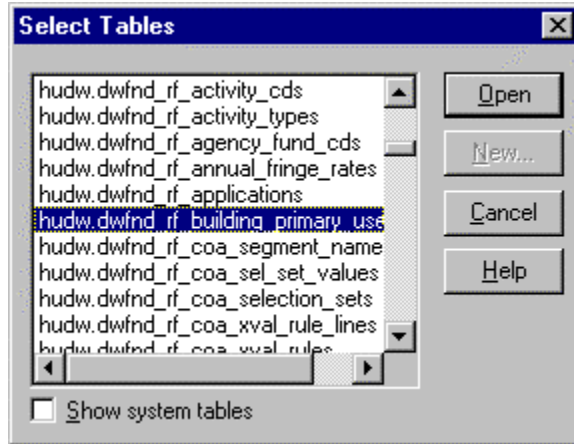
5. Click  to specify that you are going to create a query for this report.

6. Click  to specify that InfoMaker should lay out the report in columns and rows.

7. Click  to go to the *Select Tables* screen.

 The background changes to the *Report – (Untitled)* (SQL Painter) screen, and InfoMaker shows you a list of tables you can query. There may be a delay before the *Select Tables* screen displays. Refer to the work instruction “Set Table Refresh Time with InfoMaker” if you often experience a delay before this screen displays.

Select Tables



Choose Tables for Report

8. Use the scroll bar or **Page Down** key to locate the tables you want for this report.

9. Click once on the name of each table from which you want information.



The example in this work instruction uses two tables, hudw.dwfnd_rf_building_primary_uses and hudw.dwfnd_rf_root_cds. You should choose whatever tables you need to create your report.

10. Click  to go to the *Report – (Untitled)* (SQL Painter) screen.



Report - (Untitled) (SQL Painter)

The screenshot shows the InfoMaker SQL Painter interface. The main window is titled "Report - (Untitled)". It features a menu bar (File, Design, Window, Help) and a toolbar with various icons. The central area is divided into two panes, each displaying a list of columns and their data types. The left pane shows columns from the "hudw.dwfnd_rf_building_primary_uses" table, and the right pane shows columns from the "hudw.dwfnd_rf_root_cds" table. An equals sign "=" is positioned between the two panes, indicating a join operation. Below the panes, there are tabs for "Sort", "Where", "Group", "Having", "Compute", and "Syntax". The "Where" tab is currently selected, and it contains a table with columns for "Column", "Operator", "Value", and "Logical". The "Where" table is currently empty. At the bottom of the window, there is a status bar that reads "Select display columns".

| Column | Operator | Value | Logical |
|--------|----------|-------|---------|
| | | | |
| | | | |
| | | | |

Examine Joins or Enter Other Query Elements

11. Perform one of the following:

| If You Need To | Then | Go To |
|--|------|---------|
| Examine (and possibly correct) InfoMaker's automatic table joins because you are using more than one table | — | Step 12 |
| Proceed to enter other query elements because you are using only one table | — | Step 20 |



Report - (Untitled) (Join Mode)

The screenshot shows the InfoMaker application window titled "Report - (Untitled) (Join Mode)". The main workspace displays two tables joined together:

- Table 1:** hudw.dwfnd_rf_building_primary_uses Type
- Table 2:** hudw.dwfnd_rf_root_cds Type

The join is established between the `building_primary_use` field in Table 1 and the `building_primary_use` field in Table 2. The fields and their data types are listed below:

| Field Name | Data Type |
|--------------------------------|--------------|
| building_primary_use | varchar2(3) |
| building_primary_use_desc | varchar2(15) |
| building_prim_use_enabled_flag | varchar2(1) |
| building_prim_use_strt_dt_act | date |
| building_prim_use_end_dt_activ | date |
| building_primary_use_creatn_dt | date |
| building_primary_use_creatd_by | number(15,0) |
| building_prim_use_last_upd_dt | date |
| building_prim_use_last_upd_by | number(15,0) |

| Field Name | Data Type |
|---------------------------|-------------|
| univ_id_no | varchar2(8) |
| building_id_no | varchar2(4) |
| tub_owning_building_asset | varchar2(3) |
| building_primary_use | varchar2(3) |
| root_primary_org | varchar2(5) |
| root_secondary_org | varchar2(5) |
| root_parent_flag | varchar2(1) |
| root_budget_allowed_flag | varchar2(1) |
| root_posting_allowed_flag | varchar2(1) |


Below the tables is a "Where" clause editor with a table structure:

| Column | Operator | Value | Logical |
|--------|----------|-------|---------|
| | | | |
| | | | |
| | | | |

At the bottom left, there is a "Join tables" section.

Display Join Columns

12. Click  to highlight the default columns used to join the tables in your report.

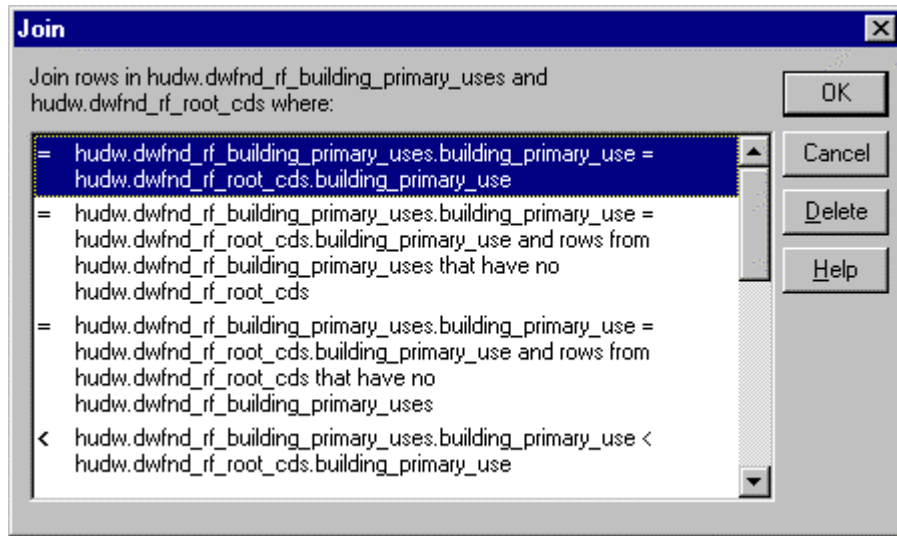
13. Click a join connector  to go to the *Join* screen.



Depending on how InfoMaker has placed the tables on the screen, you may need to drag a table out of the way or scroll part of the way through the list of columns in a table in order to see the join connector.





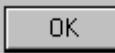
Join



Review Join

14. Review the names of the two columns InfoMaker chose to join these two tables.

15. Perform one of the following:

| If You Need To | Then | Go To |
|--|---|---------|
| Delete this join because it is wrong and create another join | Click  . | Step 16 |
| Include more columns in this join because it is incomplete | Click  . | Step 16 |
| Accept this join because it is correct and complete | Click  . | Step 18 |


Report – (Untitled) (Join Mode)

The screenshot shows the InfoMaker application window titled "Report - (Untitled)" in "Join Mode". Two tables are displayed side-by-side, connected by a join symbol (=). The left table is "hudw.dwfnd_rf_building_primary_uses" and the right table is "hudw.dwfnd_rf_root_cds". The "building_primary_use" field in both tables is selected for the join.

| Column | Operator | Value | Logical |
|--------|----------|-------|---------|
| | | | |
| | | | |
| | | | |

Join tables

Create a Join between Two Tables

- 16.** Click a column you want to join in one table.
- 17.** Click the column to which you want to join it in the other table.
- 18.** Repeat Steps 13 through 17 for each join InfoMaker automatically created and for each pair of tables you want to join.
- 19.** Click  to leave join mode.



Report - (Untitled) (SQL Painter)

The screenshot shows the InfoMaker SQL Painter interface. At the top, there is a menu bar with 'File', 'Design', 'Window', and 'Help'. Below the menu bar is a toolbar with various icons. The main window is titled 'Report - (Untitled)'. Inside the window, there is a 'Selection List' at the top with four items: 'root_cd', 'root_desc', 'building_primary_use', and 'building_primary_use_desc'. Below the selection list are two tables. The left table is 'hudw.dwfnd_rf_building_primary_uses' and the right table is 'hudw.dwfnd_rf_root_cds'. A red line connects the 'building_primary_use' field in the left table to the 'root_cd' field in the right table, with an equals sign (=) between them. Below the tables are tabs for 'Sort', 'Where', 'Group', 'Having', 'Compute', and 'Syntax'. The 'Where' tab is selected. Below the tabs is a table with four columns: 'Column', 'Operator', 'Value', and 'Logical'. The table is currently empty. At the bottom of the window, there is a 'Join tables' section.

| Column | Operator | Value | Logical |
|--------|----------|-------|---------|
| | | | |
| | | | |
| | | | |

Choose Columns to Include in Report

- 20.** Click the name of each column you want to include in your report to highlight the column name and add it to the Selection List.



This example uses four columns: root_cd, root_desc, building_primary_use, and building_primary_use_desc. You should choose whatever columns you want to show in your report.

- 21.** Perform one of the following:

| If You Need To | Then | Go To |
|---|------|---------|
| Limit the rows in the report by entering selection criteria | — | Step 22 |
| Not limit the rows, but sort them | — | Step 26 |
| Neither limit nor sort the rows, but define computed columns for the report | — | Step 29 |
| Neither limit nor sort the rows, nor define computed columns, but preview the data that the report will include | — | Step 33 |



Report – (Untitled) (Where Tab)

InfoMaker

File Design Window Help

Report - (Untitled)

Selection List: root_cd root_desc building_primary_use building_primary_use_desc

| Column | Operator | Value | Logical |
|---------------------------------------|----------|-------------|---------|
| HUDW:"DWFND_RF_ROOT_CDS":'ROOT_TYPE'' | = | 'B' | And |
| HUDW:"DWFND_RF_ROOT_CDS":'ROOT_DESC'' | like | '%Holyoke%' | |

Join tables

Create Where Clause

22. Click  to begin entering selection conditions for your query.

23. Complete the following **required** fields:

| In This Field | Enter |
|-----------------|---|
| Column | Name of the column whose values you want to limit Example: <ul style="list-style-type: none"> • hudw.dwfnd_root_cds.root_desc |
| Operator | SQL operator for the relationship between Column and Value Note: Refer to the quick reference guide “Oracle SQL Operators for WHERE Clauses” for descriptions of the operators. Example: <ul style="list-style-type: none"> • like |
| Value | Value you want to use to limit the column contents Example: <ul style="list-style-type: none"> • ‘%Holyoke%’ |
| Logical | And or Or |



Values are case sensitive. If you do not know whether a column contains mixed case or uppercase values, refer to the work instruction “View Sample Data for a Table” to examine the contents. You may instead use a case-conversion function on the column. Refer to the quick reference guide “Key Functions in Oracle SQL” for descriptions of case-conversion functions.

Example:

- WHERE UPPER(hudw.dwfnd_root_cds.root_desc) LIKE ‘%HOLYOKE%’

24. Repeat Step 23 for each condition you want in the Where clause.

Report – (Untitled) (Where Tab) (continued)

Selection List: root_cd | root_desc | building_primary_use | building_primary_use_desc

| Column | Operator | Value | Logical |
|---------------------------------------|----------|-------------|---------|
| HUDW:"DWFND_RF_ROOT_CDS":'ROOT_TYPE'' | = | 'B' | And |
| HUDW:"DWFND_RF_ROOT_CDS":'ROOT_DESC'' | like | '%Holyoke%' | |

Join tables

25. Perform one of the following:

| If You Need To | Then | Go To |
|--|-------------|--------------|
| Sort the rows for your report | — | Step 26 |
| Not sort the rows, but define computed columns for the report | — | Step 29 |
| Neither sort the rows nor define computed columns, but preview the data that the report will include | — | Step 33 |



Report – (Untitled) (Sort Tab)

The screenshot shows the InfoMaker software interface. The main window is titled "Report - (Untitled)" and contains a "Selection List" with two tables:

- Table 1:** hudw.dwfnd_rf_building_primary_uses Type
 - building_primary_use varchar2(3)
 - building_primary_use_desc varchar2(15)
 - building_prim_use_enabled_flag varchar2(1)
 - building_prim_use_strt_dt_act date
 - building_prim_use_end_dt_activ date
 - building_primary_use_creatn_dt date
 - building_primary_use_creatd_by number(15,0)
 - building_prim_use_last_upd_dt date
 - building_prim_use_last_upd_by number(15,0)
- Table 2:** hudw.dwfnd_rf_root_cds Type
 - root_cd varchar2(5)
 - root_desc varchar2(60)
 - tub_abbreviation varchar2(4)
 - root_desc_no_tub_prefix varchar2(56)
 - root_update_rf_no varchar2(20)
 - tub_owning_root_value varchar2(3)
 - root_local_attr1 varchar2(25)
 - root_type varchar2(1)
 - root_name varchar2(50)

Below the tables is the "Sort" tab, which contains the following configuration:

| Table | Column | Sort Order |
|--------------------------------------|---------|------------|
| HUDW."DWFND_RF_ROOT_CDS"."ROOT_CD" | ROOT_CD | Ascending |
| HUDW."DWFND_RF_ROOT_CDS"."ROOT_DESC" | ROOT_CD | Ascending |

At the bottom of the window, there is a "Join tables" section.

Choose Columns by Which to Sort

26. Click .

27. Drag column names from the left side to the right side.



InfoMaker sorts the data by the values in the column names on the right. The top column name is the major sort key, and any additional column names are minor sort keys.

28. Perform one of the following:

| If You Need To | Then | Go To |
|--|------|---------|
| Define computed columns for the report | — | Step 29 |
| Not define computed columns, but preview the data that the report will include | — | Step 33 |

Report – (Untitled) (Compute Tab)

The screenshot displays the InfoMaker application window titled "Report - (Untitled)". The interface includes a menu bar (File, Design, Window, Help) and a toolbar with various icons. The main workspace is divided into several sections:

- Selection List:** A horizontal list of fields from the data source "HUDW.'DWFND_RF_ROOT": root_cd, root_desc, building_primary_use, building_primary_use_desc, HUDW.'DWFND_RF_ROOT
- Data Grids:** Two grids showing field names and their data types:
 - Left Grid (hudw.dwfnd_rf_building_primary_uses):**

| Field Name | Type |
|--------------------------------|--------------|
| building_primary_use | varchar2(3) |
| building_primary_use_desc | varchar2(15) |
| building_prim_use_enabled_flag | varchar2(1) |
| building_prim_use_strt_dt_act | date |
| building_prim_use_end_dt_activ | date |
| building_primary_use_creatn_dt | date |
| building_primary_use_creatd_by | number(15,0) |
| building_prim_use_last_upd_dt | date |
| building_prim_use_last_upd_by | number(15,0) |
 - Right Grid (hudw.dwfnd_rf_root_cds):**


| Field Name | Type |
|-------------------------|--------------|
| root_cd | varchar2(5) |
| root_desc | varchar2(60) |
| tub_abbreviation | varchar2(4) |
| root_desc_no_tub_prefix | varchar2(56) |
| root_update_rf_no | varchar2(20) |
| tub_owning_root_value | varchar2(3) |
| root_local_attr1 | varchar2(25) |
| root_type | varchar2(1) |
| root_name | varchar2(50) |
- Compute Tab:** The "Compute" tab is selected. It shows a "Computed Columns" section with the following expression:

```
ROOT_CDS'::'ROOT_PRIMARY_ORG' || '' || HUDW.'DWFND_RF_ROOT_CDS'::'ROOT_SECONDARY_ORG' || 'ORG_CDS'
```
- Join tables:** A section at the bottom of the workspace.


Enter the Formulas for Computed Columns

29. Click .

30. Enter the formula to compute the value you want in your report.


 Use the right mouse button to paste functions and column names in your formula.


31. Press **Enter**.

 InfoMaker adds your computed column to the Selection List.

32. Repeat Steps 30 through 31 for each computed column you want to define.

Preview Data

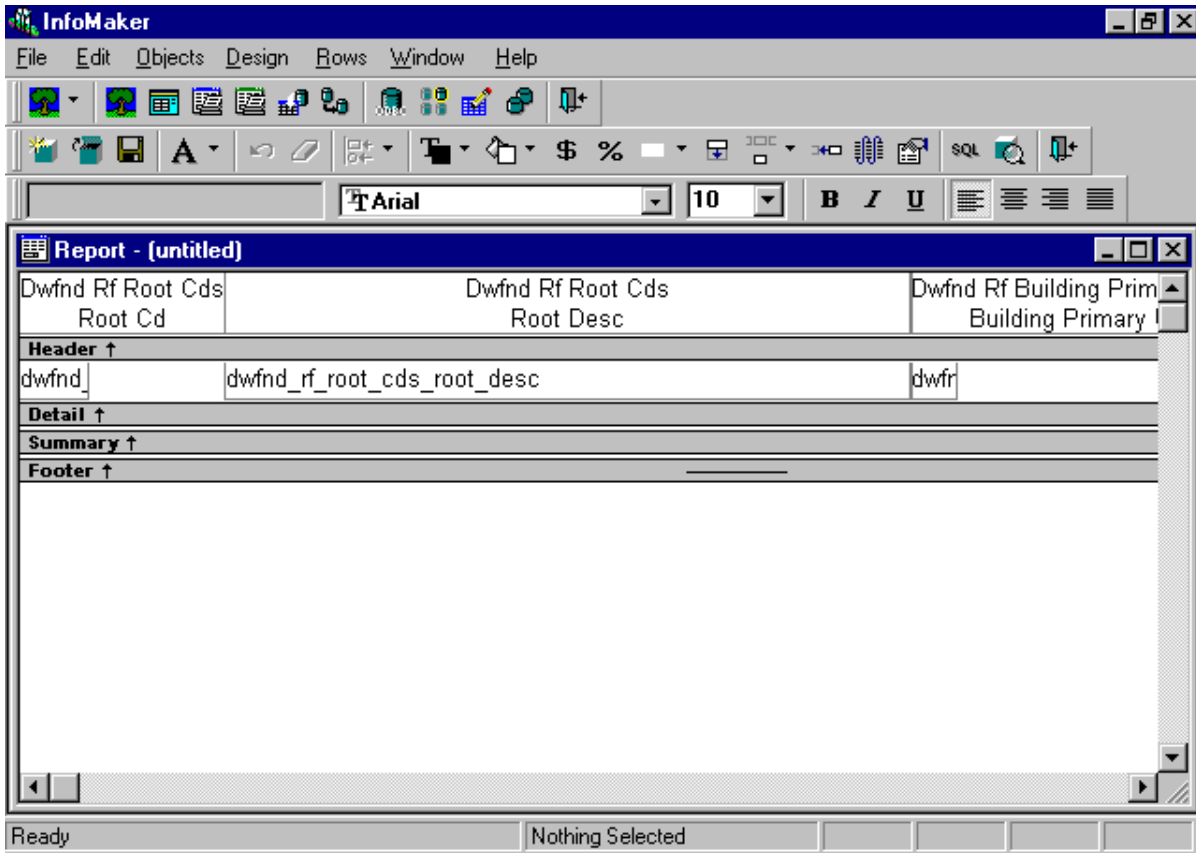
33. Click  to view the data in a simple grid format.

34. Click  to close the *SQL Preview* screen when you are finished reviewing the sample data.

35. Perform one of the following:


| If You Need To | Then | Go To |
|------------------------------------|---|---------|
| Make changes to your query | — | Step 11 |
| Make no more changes to your query | Click  to proceed to the <i>Report – (untitled)</i> (Layout Painter) screen. | Step 36 |

Report – (untitled) (Layout Painter)



Change Report Layout

36. If you want to adjust the report layout, drag and resize the text and data boxes.

37. Click  to see the data as a formatted report.




Report – (untitled) (Preview)

| Dwfnf Rf Root Cds Root Cd | Dwfnf Rf Root Cds Root Desc | Dwfnf Rf Building P Building Prim: |
|------------------------------|--------------------------------------|---------------------------------------|
| 06045 | HPRE^Holyoke Ctr Health Ser Bldg 973 | HLT |
| 06043 | HPRE^Holyoke Center Complex Bldg 100 | OFC |

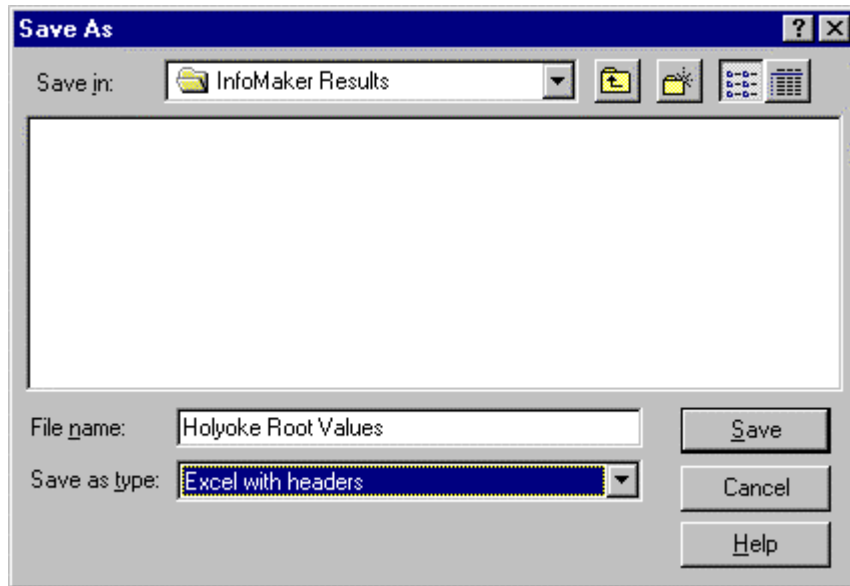
Decide Whether to Save Report Data

38. Perform one of the following:

| If You Need To | Then | Go To |
|--|--|---------|
| Save the data as a PC file for use in Excel, Paradox, Access, or another desktop application | Select File → Save Rows As to go to the <i>Save As (Rows)</i> screen. | Step 39 |
| Save your report layout and query so you can use it in the future | Click  to return to the <i>Report – (untitled)</i> (Layout Painter) screen. | Step 44 |



Save As (Rows)



Enter File Name

39. Enter a name for the file in the **File name:** field.

40. Choose a type for the file from the list.



Unless you use Excel version 5, do not choose type Excel5 or Excel5 with headers. Later (and earlier) versions of Excel accept files of type Excel, Excel with headers, CSV, and CSV with headers.

41. If necessary, choose a folder in which to save the data.

42. Click .

43. Click  to return to the *Report – (untitled)* (Layout Painter) screen.




Report – (untitled) (Layout Painter)

The screenshot displays the InfoMaker software interface in the 'Layout Painter' mode. The main window is titled 'Report - (untitled)'. The interface includes a menu bar (File, Edit, Objects, Design, Rows, Window, Help), a toolbar with various icons, and a text formatting toolbar (Arial font, size 10, bold, italic, underline). The central design area shows a report layout with the following structure:

| Dwfnf Rf Root Cds Root Cd | Dwfnf Rf Root Cds Root Desc | Dwfnf Rf Building Prim Building Primary |
|------------------------------|--------------------------------|--|
| Header ↑ | | |
| dwfnf_ | dwfnf_rf_root_cds_root_desc | dwfnf_ |
| Detail ↑ | | |
| Summary ↑ | | |
| Footer ↑ | | |

The status bar at the bottom indicates: 'Show Datawindow with data' and 'Column: dwfnf_rf_root_cds_roo x: 0.031 y: 0.000 w: 0.375 h: 0.197'.

Save Report Layout and Query

44. Click  to save your report layout and your query.



Save Report

Save Report [X]

Reports:

holyoke_roots_with_uses

OK

Cancel

Help

Comments:


This report displays all the root values for Holyoke Center with their primary use codes and descriptions and their org values.

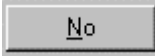
Enter Name and Description for Report

45. Complete the following **required** and optional fields:

| In This Field | Enter |
|---------------|--|
| Reports: | Name for the report layout/query combination Note: Your report name must start with a letter and may be up to 40 characters long. It may not contain any spaces. |
| Comments: | A description to help you remember exactly what this report shows |

46. Click .

47. Click  in the painter window to close this report.

48. If you do not want to save the report, omit Steps 44 through 46. At Step 47, InfoMaker asks whether you want to save your changes. Click  to discard the report layout and its query.

Results

You have created a report and saved its contents (optionally) and the combination of its query and layout.

You have completed this procedure. Select **File** → **Exit** to exit InfoMaker.



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