

X/PTR

User Guide

Overview

Introduction

JHSXPTR is the combined system of JHS and X/PTR which provides online viewing of production jobs and reports from the mainframe computer at Central Office in Austin. JHS (Job History System) stores JCL (Job Control Language) produced by the Information Services department, and **X/PTR** (pronounced Exporter) stores an online version of production reports. The full name of the application is JHSXPTR. As a user of a mainframe application, you will deal only with the X/PTR system.

Through X/PTR, you will be able to:

- gain immediate online access to production reports
- obtain the part of a report that you need
- eliminate the loss or delay of reports through the mail
- begin to realize a paperless environment

This guide will detail *only* the X/PTR subsystem by explaining the functions that are available to you through X/PTR and how they are accomplished.

X/PTR Functions

By using X/PTR, you will be able to:

- access reports and parts of reports at your workstation
- view reports at your workstation, including multiple/older versions
- print entire reports or parts of reports from your workstation
- customize your part of the X/PTR system to fit your daily requirements.

The number and kinds of reports you can view is determined by your access privileges for each application you use.

How to Use this Document

This document has been prepared for use in identifying and describing the features and functions available with X/PTR. The table of contents provides the system documentation layout and serves as an index for easy reference to the features available for your use. References are made to the corresponding lessons in the User's Workbook.

System Support

The Help Desk offers system support for the X/PTR system. The Help Desk telephone numbers are 512/206-4666 or 888/952-4357.

Overview, Continued

Convenience Copy Reports are viewable online through X/PTR as a convenience in performing daily work activities and should not be used as the official copy of record for legal or auditing purposes.

Report Frequency Production reports are produced in systematic intervals of time according to the data being reported and its intended use. This time interval reflects how often a report is produced and is referred to as its frequency.

Report frequencies may differ according to the system involved. For example, the frequency of a CARE report may be daily, weekly, bi-weekly, monthly, bi-monthly, quarterly, semi-annual, or annual.

Report Retention A report's retention period is the period of time from its creation and submission to X/PTR until it is no longer tracked by X/PTR. Reports are maintained in X/PTR for their specified retention period.

Each report in X/PTR is defined to a retention group. For example, the retention groups could include: 15 days, 40 days, 100 days, 200 days, and 400 days. The owner of each automated system has reviewed the list of production reports from that system and has assigned each report a retention group.

Archive Process When production reports are sent to X/PTR, they are stored on a disk file linked to the mainframe computer. At certain intervals, X/PTR determines the space available in the disk file and copies the oldest reports from disk to tape to allow for space on the disk file for reports currently being stored.

Reports are said to be archived when they are copied from disk to tape. These reports remain archived based on their retention period.

A report may be on disk or on tape at a given time. If it is on tape, X/PTR must restore it to disk before it can be viewed in X/PTR. Reports that are restored can be viewed by others without another restoration.

Overview, Continued

Getting Access to X/PTR

Initial implementation will allow X/PTR access to all current users of an application. New users will request access to X/PTR as part of their initial request for systems access.

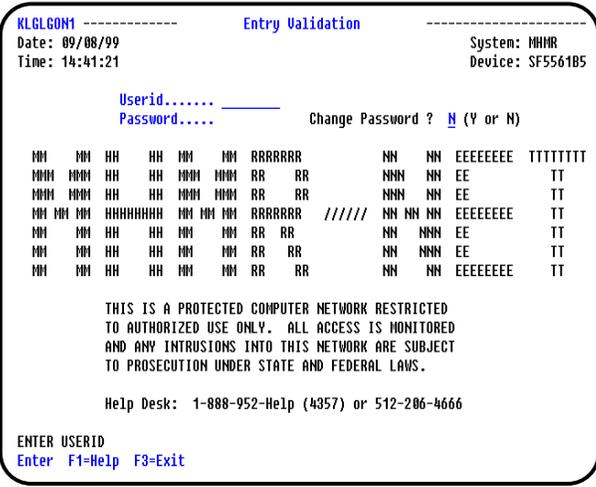
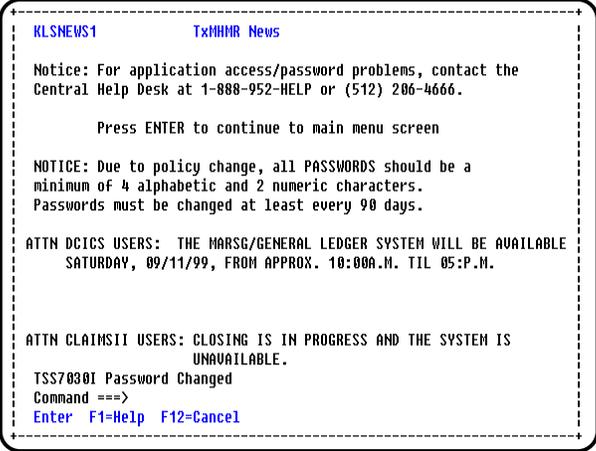
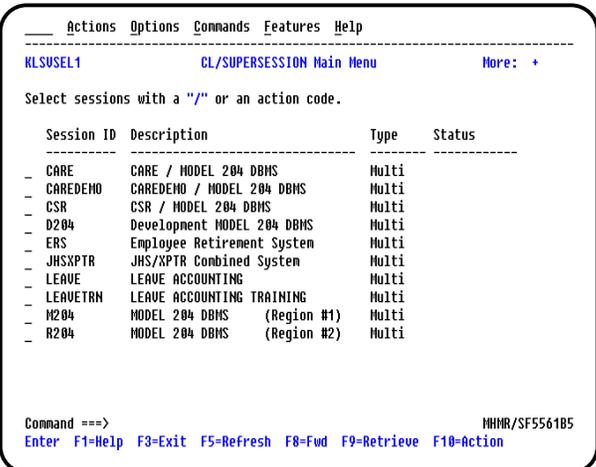
Getting Linked with a Report

Owners of each production system will determine who has rights to view which reports for their system. If you have a need to view certain reports and currently do not have rights to view, you must contact the owner of the system.

Accessing X/PTR

Accessing X/PTR The following table describes the steps used to access JHSXPTR.

Note: You must access the combined system of JHSXPTR to gain access to the X/PTR functions.

Step	View	Action																																												
1		<p>From the SuperSession MHMR-NET screen:</p> <ul style="list-style-type: none"> • Key your User ID in the USERID field. • Tab to the PASSWORD field and key your password. • Press <Enter>. <p>Result: The TXMHMR News screen is displayed.</p>																																												
2		<p>The TXMHMR News screen is provided to broadcast network information.</p> <ul style="list-style-type: none"> • Read the screen for messages concerning system availability. • Press <Enter>. <p>Result: The system displays the CL/SUPERSESSION Main Menu screen.</p>																																												
3	 <table border="1" data-bbox="310 1549 802 1770"> <thead> <tr> <th>Session ID</th> <th>Description</th> <th>Type</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>- CARE</td> <td>CARE / MODEL 204 DBMS</td> <td>Multi</td> <td></td> </tr> <tr> <td>- CAREDEMO</td> <td>CAREDEMO / MODEL 204 DBMS</td> <td>Multi</td> <td></td> </tr> <tr> <td>- CSR</td> <td>CSR / MODEL 204 DBMS</td> <td>Multi</td> <td></td> </tr> <tr> <td>- D204</td> <td>Development MODEL 204 DBMS</td> <td>Multi</td> <td></td> </tr> <tr> <td>- ERS</td> <td>Employee Retirement System</td> <td>Multi</td> <td></td> </tr> <tr> <td>- JHSXPTR</td> <td>JHSXPTR Combined System</td> <td>Multi</td> <td></td> </tr> <tr> <td>- LEAVE</td> <td>LEAVE ACCOUNTING</td> <td>Multi</td> <td></td> </tr> <tr> <td>- LEAVETRN</td> <td>LEAVE ACCOUNTING TRAINING</td> <td>Multi</td> <td></td> </tr> <tr> <td>- R204</td> <td>MODEL 204 DBMS (Region #1)</td> <td>Multi</td> <td></td> </tr> <tr> <td>- R204</td> <td>MODEL 204 DBMS (Region #2)</td> <td>Multi</td> <td></td> </tr> </tbody> </table>	Session ID	Description	Type	Status	- CARE	CARE / MODEL 204 DBMS	Multi		- CAREDEMO	CAREDEMO / MODEL 204 DBMS	Multi		- CSR	CSR / MODEL 204 DBMS	Multi		- D204	Development MODEL 204 DBMS	Multi		- ERS	Employee Retirement System	Multi		- JHSXPTR	JHSXPTR Combined System	Multi		- LEAVE	LEAVE ACCOUNTING	Multi		- LEAVETRN	LEAVE ACCOUNTING TRAINING	Multi		- R204	MODEL 204 DBMS (Region #1)	Multi		- R204	MODEL 204 DBMS (Region #2)	Multi		<p>The CL/SUPERSESSION Main Menu provides a listing of your menu applications and will vary according to the applications to which you have access.</p> <ul style="list-style-type: none"> • Review the CL/SUPERSESSION Main Menu. • Select the session that allows you to access JHSXPTR. <p>Result: The system displays the X/PTR V22: Favorites menu.</p>
Session ID	Description	Type	Status																																											
- CARE	CARE / MODEL 204 DBMS	Multi																																												
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Setting Your X/PTR Viewing and Printing Options

Introduction

A user profile is a set of tailoring options that affects only a specific user, and that user usually enters them. X/PTR allows you to customize your user profile with your favorites list and your print profile to set your viewing and printing options.

Profile Favorites and Print Profile

You must perform a series of steps to set your User Profile Favorites and your Print Profile. Once your User Profile Favorites and your Print Profile are set, you will *not* have to complete this process again unless you need to add reports to your Profile Favorites or change your printer number.

Important: You will *not* be able to access your X/PTR reports or print from X/PTR until these steps are completed. This process must be completed *one time only*.

The following sections include documentation on:

- User Profile Favorites
 - Print Profile
-

User Profile Favorites

Introduction X/PTR allows you to set your User Profile Favorites and save updates by selecting reports and directories with which you will be working. When you exit X/PTR, the selection you make will be activated.

Procedure The following table describes the steps used to set your User Profile Favorites.

Step	View	Action
1	--	Logon to SuperSession and access X/PTR. <u>Result:</u> The V22: Favorites screen is displayed.
2	<p>A sample V22: Favorites screen is shown below.</p> <pre data-bbox="272 716 883 1146"> J 1 U22: Favorites Command ==> pro Scroll ==> CSR Commands: PRO - Update Favorites (via Profile) Options: B - Display on terminal S - List report versions U - List report views PRT - Print Use END command to exit. Opt Entry Title ***** End of list ***** </pre>	<p>On the V22: Favorites screen:</p> <ul style="list-style-type: none"> • Key pro on the COMMAND line. • Press <Enter>. <p><u>Result:</u> The G01: Profile for /User screen is displayed.</p>
3	<p>A sample G01: Profile for /User screen is shown below.</p> <pre data-bbox="272 1209 883 1640"> J 1 G01: Profile for /USER/F655/F550366 Command ==> fav Select Command from list below. Place any character next to command or enter command in Command ==> area. - Cmd Description - Profile action FAV - Favorites List I - Reset PRT - Print defaults L - Reload BRS - Browse CAN - Cancel ARC - Archive restore CMD - Initial menu UFV - Verify deletes JHS - JHS options </pre>	<p>On the G01: Profile for /User screen:</p> <ul style="list-style-type: none"> • Key fav on the COMMAND line. • Press <Enter>. <p><u>Result:</u> The G30: Manage Favorites List screen is displayed.</p>

continued on next page

User Profile Favorites, Continued

Procedure, continued

Step	View	Action
4	<p>A sample G30: Manage Favorites List screen is shown below.</p> <pre> J 1 G30: Manage Favorites List Use HELP for information Command ==> To exit this screen before making any changes, press END. To continue, select an ACTION, a FORMAT, and press ENTER. ACTION (Select with any character on the left) Display/modify group directory and/or report list. Create new list with all available reports. s Select reports and directories to add to the list. Display/remove reports and directories in the list. Remove all reports and directories from the list. Add browsed reports to list automatically. Discard any changes and revert to prior list. Exit saving any list updates. FORMAT OF REPORT NAMES USED IN LIST CREATION PROCESS Title Alternate name JCL Form ID Job, step, procstep, DD S Title, sorted in report name sequence </pre>	<p>On the G30: Manage Favorites List screen:</p> <ul style="list-style-type: none"> • Tab to the ACTION column. • Key s to the left of the following statement: <i>“Select reports and directories to add to the list.”</i> • Press <Enter>. <p>Result: The G31: Select Reports from Directory / screen is displayed.</p>
5	<p>A sample G31: Select Reports from Directory / screen is shown below.</p> <pre> J 1 G31: Select Reports From Directory / Line Command ==> Scroll ==> CSR Select the report and directories to be added with an S in the Opt column. To expand a directory to the next level, use a ? in the Opt column. Press ENTER to make changes, and END to exit this level. Opt Report Title ? /RPT *DIRECTORY* ***** End of list ***** </pre>	<p>On the G31: Select Reports from Directory / screen:</p> <ul style="list-style-type: none"> • Tab to the OPT column. • Key ? next to /RPT. • Press <Enter>. <p>Result: The G31: Select Reports from Directory /RPT screen is displayed.</p>
6	<p>A sample G31: Select Reports from Directory /RPT screen is shown below.</p> <pre> J 1 G31: Select Reports From Directory /RPT Line Command ==> Scroll ==> CSR Select the report and directories to be added with an S in the Opt column. To expand a directory to the next level, use a ? in the Opt column. Press ENTER to make changes, and END to exit this level. Opt Report Title s /RPT/CARE CARE s /RPT/README README s /RPT/TRAIN TRAIN ***** End of list ***** </pre>	<p>On the G31: Select Reports from Directory /RPT screen:</p> <ul style="list-style-type: none"> • Tab to the OPT column. • Key a lower case s next to the reports you need on your favorites list. <p>Note: All users should select README and TRAIN in addition to other reports.</p> <ul style="list-style-type: none"> • Press <Enter>. <p>Result: Your report directories are selected and the G31: Select Reports from Directory /RPT screen is displayed again.</p>

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User Profile Favorites, Continued

Procedure, continued

Step	View	Action
7	<p>A sample G31: Select Reports from Directory /RPT screen is shown below. Note that the S's in the OPT column are now displayed in upper case.</p> <pre> J 1 G31: Select Reports From Directory /RPT Line 1 Command ==> Scroll ==> CSR Select the report and directories to be added with an S in the Opt column. To expand a directory to the next level, use a ? in the Opt column. Press ENTER to make changes, and END to exit this level. Opt Report Title S /RPT/CARE CARE S /RPT/README README S /RPT/TRAIN TRAIN ***** End of list ***** </pre>	<p>On this G31: Select Reports from Directory /RPT screen:</p> <ul style="list-style-type: none"> Press F3 to exit. <p><u>Result:</u> The G31: Select Reports from Directory / screen is displayed.</p>
8	<p>A sample G31: Select Reports from Directory / screen is shown below.</p> <pre> J 1 G31: Select Reports From Directory / Line 1 Command ==> Scroll ==> CSR Select the report and directories to be added with an S in the Opt column. To expand a directory to the next level, use a ? in the Opt column. Press ENTER to make changes, and END to exit this level. Opt Report Title /RPT *DIRECTORY* ***** End of list ***** </pre>	<p>On the G31: Select Reports from Directory / screen:</p> <ul style="list-style-type: none"> Press F3 to exit. <p><u>Result:</u> The G30: Manage Favorites List screen is displayed.</p>
9	<p>A sample G30: Manage Favorites List screen is shown below.</p> <pre> J 1 G30: Manage Favorites List Command ==> To exit this screen before making any changes, press END. To continue, select an ACTION, a FORMAT, and press ENTER. ACTION (Select with any character on the left) Display/modify group directory and/or report list. Create new list with all available reports. Select reports and directories to add to the list. Display/remove reports and directories in the list. Remove all reports and directories from the list. Add browsed reports to list automatically. Discard any changes and revert to prior list. s Exit saving any list updates. FORMAT OF REPORT NAMES USED IN LIST CREATION PROCESS Title Alternate name JCL Form ID Job, step, procstep, DD S Title, sorted in report name sequence </pre>	<p>On the G30: Manage Favorites List screen:</p> <ul style="list-style-type: none"> Tab to the ACTION column. Key s to the left of the following statement: <i>“Exit saving any list updates.”</i> Press <Enter> to exit and save your profile favorites. <p><u>Result:</u> The G01: Profile for /User screen is displayed.</p>

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User Profile Favorites, Continued

Procedure, continued

Step	View	Action
10	<p>A sample G01: Profile for /User screen is shown below.</p> <pre> J 1 G01: Profile for /USER/F655/F550366 Command ==> Fau Select Command from list below. Place any character next to command or enter command in Command ==> area. - Cnd Description - Profile action FAU - Favorites List I - Reset PRT - Print defaults L - Reload BRS - Browse CAN - Cancel ARC - Archive restore CMD - Initial menu UFY - Verify deletes JHS - JHS options </pre>	<p>On the G01: Profile for /User screen:</p> <ul style="list-style-type: none"> • Press F3 to exit. <p><u>Result:</u> The V22: Favorites screen is displayed.</p>
11	<p>A sample V22: Favorites screen is shown below.</p> <pre> J 1 V22: Favorites Command ==> Scroll ==> CSR Commands: PRO - Update Favorites (via Profile) Options: B - Display on terminal S - List report versions U - List report views PRT - Print Use END command to exit. Opt Entry Title ***** End of list ***** </pre>	<p>On the V22: Favorites screen:</p> <ul style="list-style-type: none"> • Press F3 to exit X/PTR and activate your selection. <p><u>Result:</u> When you access X/PTR again, a directory of the reports you need will be displayed.</p>

Print Profile

Introduction

X/PTR allows you to set your Print Profile that includes selecting print drivers and your printer number to use in working with X/PTR. When you exit X/PTR, the modifications you make will be saved.

Procedure

The following table describes the steps used to set your Print Profile. This process will need to be completed *one time only unless your printer number changes*.

Step	View	Action
1	--	Logon to SuperSession and access X/PTR. <u>Result:</u> The V22: Favorites screen is displayed.
2	<p>A sample V22: Favorites screen is shown below.</p> <pre data-bbox="272 779 883 1205"> J 1 V22: Favorites Line 1 Command ==> pro Scroll ==> CSR Commands: PRD - Update Favorites (via Profile) Options: B - Display on terminal S - List report versions U - List report views PRT - Print Use END command to exit. Opt Entry Title CARE CARE README README TRAIN TRAIN ***** End of list ***** </pre>	<p>On the V22: Favorites screen:</p> <ul style="list-style-type: none"> • Key pro on the COMMAND line. • Press <Enter>. <p><u>Result:</u> The G01: Profile for /User screen is displayed.</p>
3	<p>A sample G01: Profile for /User screen is shown below.</p> <pre data-bbox="272 1283 883 1703"> J 1 G01: Profile for /USER/F655/F550366 Command ==> prt Select Command from list below. Place any character next to command or enter command in Command ==> area. - Cmd Description - Profile action FAU - Favorites List I - Reset PRT - Print defaults L - Reload BRS - Browse CAN - Cancel ARC - Archive restore CMD - Initial menu UFY - Verify deletes JHS - JHS options </pre>	<p>On the G01: Profile for /User screen:</p> <ul style="list-style-type: none"> • Key prt on the COMMAND line. • Press <Enter>. <p><u>Result:</u> The P01: Standard Print Profile for /User screen is displayed.</p>

continued on next page

Print Profile, Continued

Procedure, continued

Step	View	Action
4	<p>A sample P01: Standard Print Profile for /User screen is shown below.</p> <pre> J 1 P01: Standard Print Profile for /USER/F655/F550366 Command ==> dvr Commands: DUR - Drivers CAN - Cancel This screen identifies special options for printing SYSOUT when requested with a P print command. No special information is required for normal printing. Banner page name ==> Combine print requests ==> NO (YES/NO) Output driver ==> Confirm print request ==> YES (YES=always,FIRST=first time,NO=only if ?) Press ENTER to display output parameters if driver specified Press END to exit </pre>	<p>On the P01: Standard Print Profile for /User screen:</p> <ul style="list-style-type: none"> • Key dvr on the COMMAND line. (OUTPUT DRIVER field will be blank.) • Press <Enter> to display a list of output drivers. <p>Result: The P30: Drivers for /User screen is displayed.</p>
5	<p>A sample P30: Drivers for /User screen is shown below.</p> <pre> J 1 P30: Drivers for /USER/F655/F550366 Command ==> Options: S - Select I - Initialize DEL - Delete from profile Press ENTER then END key when all driver selections are complete Opt Name Description PNSP DHS - XEROX 4050, NO SEPARATOR PAGES, NO DJDE SUPPORT PNS2 DHS - XEROX 4050, NO SEPARATOR PAGES, DJDE SUPPORT PRT1 DHS - XEROX 4050, SEPARATOR PAGES, NO DJDE SUPPORT PRT2 DHS - XEROX 4050, SEPARATOR PAGES, DJDE SUPPORT PRT3 DHS - XEROX 4050, SEPARATOR PAGES, DJDE SUPPORT (LANDUP) PBSP DHS - XEROX 4050, NO SEPARATORS, NO DJDE, LOGONID PBS2 DHS - XEROX 4050, NO SEPARATORS, DJDE SUPPORT, LOGONID PBT1 DHS - XEROX 4050, SEPARATORS, NO DJDE, LOGONID PBT2 DHS - XEROX 4050, SEPARATORS, DJDE SUPPORT, LOGONID PD01 SPOOL TO MUS PRE-ALLOCATED DATASET PTST DHS - PRINT TEST (HELD), NO SEPARATORS, NO DJDE, LOGONID s PL01 * UPS PRINT (NOT HELD) TO REQUESTOR LOCAL PRINTER PL02 UPS PRINT (HELD) TO REQUESTOR LOCAL PRINTER PDR UPS PRINT (NOT HELD), PORTRAIT SIMPLEX POR0 UPS PRINT (NOT HELD), PORTRAIT DUPLEX PLAN UPS PRINT (NOT HELD), LANDSCAPE SIMPLEX PLND UPS PRINT (NOT HELD), LANDSCAPE DUPLEX </pre>	<p>On the P30: Drivers for /User screen:</p> <ul style="list-style-type: none"> • Tab to the OPT column. • Key s to the left of the following printer driver: PL01. • Press <Enter>. <p>Result: The P20: Print Characteristics screen is displayed.</p>
6	<p>The P20: Print Characteristics screen is shown below.</p> <pre> J 1 P20: Print Characteristics Command ==> Commands: CAN - Cancel F - Find Output driver: PL01 Press ENTER then END key when all modifications are complete Parameter Value DEST * PRT021 COPIES * 001 ***** End of list ***** </pre>	<p>On the P20: Print Characteristics screen:</p> <ul style="list-style-type: none"> • Tab to the DEST field under the VALUE column. • Key <i>your printer number</i> in the following format: prt_ _ _ . (Contact your computer support staff if you do not know your printer number.) • Press <Enter>. • Press F3 when all modifications are complete to save printer information.

Exiting X/PTR

Exiting X/PTR

To exit X/PTR, press the **F3** key.

Note: Depending on the X/PTR screen at which you are located, you may have to press the **F3** key more than once to exit the system.

If you are in a menu, the **F3** key immediately exits you to the **CL/SUPERSESSION Main Menu**.

If you are within a report, press the **F3** key to return to the **V22: Favorites** (reports) menu. Then press the **F3** key again to exit X/PTR.

Result: The **CL/SUPERSESSION Main Menu** is displayed.

User's Workbook
Reference

Lesson 4, Logging Off X/PTR

X/PTR Menu Format

Introduction

X/PTR provides menus to allow you to choose from available options, commands, and functions to select and work with an application, a directory, or a report.

Note: X/PTR menus display only the applications, directories, or reports to which you have access.

Moving Around the Menu

Moving around within an X/PTR menu is accomplished by using the **TAB** and **BACKTAB** keys on a Telex terminal keyboard. Personal computer (PC) keyboards use the **TAB** to move forward to the next field and **SHIFT + TAB** to move backward to the previous field.

Menu Format

An X/PTR menu consists of a **Menu Header**, **Option Identifier**, and **ADR** (Application/Directory/Report) **Listing**. For example, the **V22: Favorites** (reports) menu indicating these areas is shown below.

Menu Header

Option Identifier

ADR Listing

```
J 1 V22: Favorites                               Line
Command ==>>>                                   Scroll ==>> CSR

Commands: PRO - Update Favorites (via Profile)
Options:  B - Display on terminal
          S - List report versions    U - List report views
          PRT - Print

Use END command to exit.

Opt Entry           Title
HC022280.Q          ACTIVE CLIENTS
HC022140.Q          CLIENT ASGHT REPORT
HC021130.Q          CLIENT CHARACT TRENDS AGE & PROB
HC022260.Q          MH CLIENTS AVERAGE LOS
HC021160.Q          MH CLIENTS SEX & ETHNICITY
HC021161.Q          MH CLIENTS SEX & ETHNICITY
HC027245.M          MH PERSONS SERVED REPORT
HC027245.Q          MH PERSONS SERVED REPORT
HC028855.M          MR CLIENTS BY RES TYPE BY COMP
HC021164.Q          MR CLIENTS SEX & ETH(COMP)
HC021165.Q          MR CLIENTS SEX & ETH(COHH)
HC021162.Q          MR CLIENTS SEX & ETHNICITY
HC021163.Q          MR CLIENTS SEX & ETHNICITY
```

Menu Header

The Menu Header always displays the screen number, screen name, and current line number, and provides you with a COMMAND line.

In the above example, the screen number is **V22** and the screen name is **Favorites**. The **LINE** field displays 1, the current line number of your display.

An X/PTR system message can also be displayed in the upper right corner of the menu header.

X/PTR Menu Format, Continued

Option Identifier The Option Identifier portion of X/PTR menus lists the possible commands you can enter on the **COMMAND** line and the options you can enter in the **OPT** column. The table shows the options that are identified in the example menu.

Option	Task
B	Display on terminal.
S	List report versions.
V	List report views.
PRT	Print.

ADR Listing Depending on the menu, the ADR Listing displays applications, directories, or reports to which you have access. In the example, the menu lists available reports by name and title. The **OPT** column is provided for entries from the Option Identifier. At the end of the list is an End of List indicator.

User's Workbook Reference Lesson 2, The X/PTR Menu

Accessing Reports

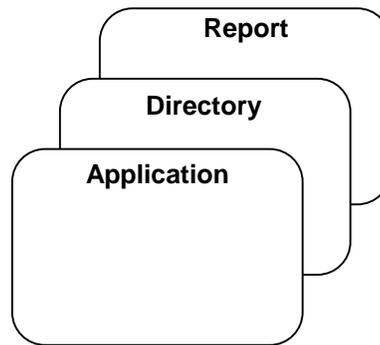
Menu Structure

Accessing reports in X/PTR for viewing or printing is accomplished by using the menu structure. A menu is provided to select an application, select a directory, and select a report.

The menu structure within X/PTR allows you to move from level to level. The menu structure always begins at the APPLICATION level, proceeds through the DIRECTORY level and finally to the specific REPORT level.

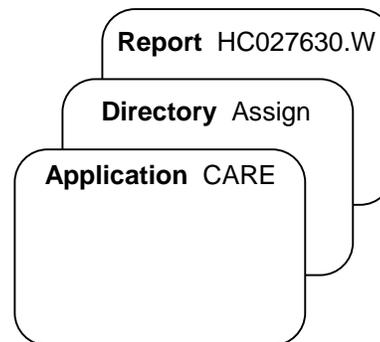
Menu Structure Diagram

The diagram shows the menu structure within the X/PTR system.



Example of a Menu Structure

The diagram gives an example of a menu progression from the APPLICATION-CARE level, to the DIRECTORY-ASSIGN level, and ending with the REPORT-HC027630.W level.



User's Workbook Reference

Lesson 2, The X/PTR Menu

Following Sections

The following sections include documentation on:

- Selecting an Application
 - Selecting a Directory
 - Selecting a Report
-

Selecting an Application

Applications Menu After logging on to X/PTR, the first screen displayed is the **V22: Favorites** (applications) menu. Since this menu displays all of the applications to which you have access, your menu may look different from the example shown below.

```
J 1 V22: Favorites                               Line 1
Command ==>                                     Scroll ==> CSR

Commands: PRO - Update Favorites (via Profile)
Options:  B - Display on terminal
          S - List report versions      U - List report views
          PRT - Print

Use END command to exit.

Opt Entry           Title
CARE                CARE
CLAIMSII            CLAIMSII
MSA                 MSA
PAYROLL             PAYROLL
***** End of list *****
```

Menu Header The Menu Header in this example indicates that you are on the **V22: Favorites** menu.

Option Identifier The Option Identifier section of the applications menu displays **S – LIST REPORT VERSIONS** as the available option to enter in the OPT column.

ADR Listing The ADR Listing on the example displays applications of CARE, CLAIMSII, and MSA, and PAYROLL. Your screen will display the applications to which you have access.

Read Me File A directory named “Read Me” is available for viewing at your convenience and contains additional information about the X/PTR system and support information.

How to Select an Application To use the **V22: Favorites** (applications) menu:

- Press <**Tab**> until you are in the OPT column next to the application you want to access
- Key **S** in the OPT column to select the application.
- Press <**Enter**>.

Result: The **V22: Favorites** (directories) menu with the directories for the selected application is displayed.

User’s Workbook Reference Lesson 2, The X/PTR Menu

Selecting a Directory

Directory Menu

The **V22: Favorites** (directories) menu shown below displays all of the directories to which you have access.

```
J 1 V22: Favorites                               Line 1
Command ==>                                     Scroll ==> CSR

Commands: PRO - Update Favorites (via Profile)
Options:  B - Display on terminal
          S - List report versions      U - List report views
          PRT - Print

Use END command to exit.

Opt Entry      Title
ANNUAL.EXAMS.DUE  ANNUAL.EXAMS.DUE
ASSIGN           ASSIGN
CASE.MGMT        CASE.MGMT
CENSUS           CENSUS
CENTRAL.OFFICE   CENTRAL.OFFICE
COMM.CENTER.BATCH COMM.CENTER.BATCH
COMMIT           COMMIT
COMP.DESCRPT     COMP.DESCRPT
COUNTY.CHANGE   COUNTY.CHANGE
DGS              DGS
EXEC.RPTS.MAILED EXEC.RPTS.MAILED
IHFS             IHFS
JAIL.MATCH       JAIL.MATCH
```

Menu Header

The Menu Header in this example indicates that you are on the **V22: Favorites** menu.

Option Identifier

The Option Identifier section of the directories menu displays **S – LIST REPORT VERSIONS** as the available option to enter in the OPT column.

ADR Listing

The ADR Listing in the example displays the directories ANNUAL.EXAMS.DUE, ASSIGN, CASE.MGMT, CENSUS, etc. within the CARE application. Your screen will display the directories to which you have access.

Selecting a Directory, Continued

Scrolling Through the Directory List

The number of directories to which you have access may exceed the space available on your screen. X/PTR provides commands that can be entered on the **COMMAND** line for scrolling up and down through the menu's directory list. The table lists the commands and describes the tasks they accomplish.

Command	Task Description
BOTTOM	Displays the last (or bottom) of the directory list. <u>Note:</u> The End of List indicator will <i>not</i> be displayed when this command is used.
FIND	Searches to display a specific directory name or text. See <i>Using FIND</i> in this documentation for detail on this command.
TOP	Displays the beginning (or top) of the directory list.

X/PTR also assigns function keys for use with this menu. The table describes the available function keys.

Function Key	Description
F3	Exit the current screen.
F7	Scroll up through the list of directories.
F8	Scroll down through the list of directories.

How to Select a Directory

To use the **V22: Favorites** (directories) menu:

- Press <**Tab**> until you are in the **OPT** column next to the directory you want to access.
- Key **S** in the **OPT** column to select the directory.
- Press <**Enter**>.

Result: The **V:22 Favorites** (reports) menu with the reports for the selected directory is displayed.

User's Workbook Reference

Lesson 2, The X/PTR Menu

Selecting a Report

Report Menu

The **V22: Favorites** (reports) menu shown below displays the reports to which you have access.

```

J 1 V22: Favorites                               Line 1
Command ==>                                     Scroll ==> CSR

Commands: PRO - Update Favorites (via Profile)
Options:  B - Display on terminal
          S - List report versions      V - List report views
          PRT - Print

Use END command to exit.

Opt Entry           Title
HC022130.W         ADH/ABS/DISCH/PLACE BY LSA
HC022135.H         ADH/ABS/DISCH/PLACE BY LSA
HC029135.Q         ADMISSIONS TO SH BY HHA
HC026700.H         ALL CAMPUS CLIENTS ON CARE
HC022160.W         ASGND TO PROG W/O ACT ASGMT
HC020010.H         ASSIGNED CLIENTS/ALPHA
HC020020.H         ASSIGNED CLIENTS/NUMERIC
HC027040.D         ASSIGNMENTS POSTED
HC026720.W         ATT'D 30 DAYS WILL EXPIRE/HOS
HC026722.W         ATT'D 30 DAYS WILL EXPIRE/SCH
HC029190.D         CAMPUS PERSONS/RSH
HC023825.H         CAMPUS-BASED ASGMT FOR CP
HC023820.H         CAMPUS-BASED ASGMT FOR PPP
  
```

Menu Header

The Menu Header in this example indicates that you are on the **V22: Favorites** menu.

Option Identifier

The Option Identifier section of the **V22: Favorites** (reports) menu lists the available options and function keys assigned for use with this menu.

The table describes the options available to enter in the OPT column.

Option	Description
B	Display on terminal. See <i>Displaying a Report</i> in this documentation for detail on this option.
S	List all available versions of the report. See <i>Listing Report Versions</i> in this documentation for detail on this option.
V	List the report views. See <i>Listing Report Views</i> in this documentation for detail on this option.
PRT	Print the report. See <i>Printing Reports</i> in this documentation for detail on this option. <u>Note:</u> You can print multiple reports by keying PRT in the OPT columns next to each of the reports you want to print.

Selecting a Report, Continued

ADR Listing

In the above example, the ADR Listing displays the *most recent version* of each report for the directory within the application you have selected. This list includes *only* the reports to which you have access.

The list displays the report name and corresponding report title. In some cases the system owner has added an extension to the report name indicating the report's frequency. Commonly used frequencies are: **D** (Daily), **W** (Weekly), **M** (Monthly), **Q** (Quarterly), **A** (Annually), and **S** (Semi-Annually). The last report in this list is followed by an End of List indicator.

Scrolling Through the List of Reports

The number of reports to which you have access may exceed the space available on your screen. X/PTR provides commands for scrolling up and down through the menu's report list that can be entered on the COMMAND line. The table lists the commands and describes the tasks they accomplish.

Command	Task Description
BOTTOM	Displays the last (or bottom) of the report list. <i>Note:</i> The End of List indicator will <i>not</i> be displayed when this command is used.
FIND	Searches to display a specific report name or text. See <i>Using FIND</i> in this documentation for detail on this command.
TOP	Displays the beginning (or top) of the report list.

X/PTR also assigns function keys for use with this menu. The table describes the available function keys.

Function Key	Description
F3	Exit the current screen.
F7	Scroll up through the list of directories.
F8	Scroll down through the list of directories.

Selecting a Report, Continued

Additional Printing Feature In addition to the **PRT** option in the list of options, X/PTR provides the additional feature of **P?** to allow you to print a report. See *Printing Reports* in this documentation for detail on this feature.

How to Select a Report To use the **V22: Favorites** (reports) menu:

- Press **<Tab>** until you are in the **OPT** column next to the report you want to view or print.
- Key the option you have selected in the **OPT** column.
- Press **<Enter>**.

Result: The **B02: (report name)** screen is displayed.

User's Workbook Reference Lesson 3, Accessing a Report

Browsing Reports

Overview

To be able to look at a report or parts of reports, you will use the **Browse** option to select the report(s) you want to display on your screen.

The following sections include documentation on:

- Displaying a Report
 - Scrolling through a Report
 - Using Function Keys to Scroll
 - Using Commands to Scroll
-

Displaying a Report

Using the Browse Option

If you selected Option **B** (Display on terminal) on the report menu next to the report you want to browse, the report you indicated will be displayed at your workstation. The sample browse screen **B02: Num Active MR Clients By LSA** that displays the HC026350.M CARE report is shown below.

```
J 1 B02: NUM ACTIVE MR CLIENTS BY 12/12/2001 Pg 1 of 2 Line 1
Command ==> Scroll ==> 5

DATE PREPARED: 11-14-98          T X H H R
TIME PREPARED: 04:51            NUMBER OF ACTIVE MR PERSONS
                                SNAPSHOT AS OF 11-15-98
```

LSA*	MR AUTHORITY	CAMPUS RES TOTAL	COMM RES TOTAL	COMMUNITY CLIENT/FAMIL TOTAL	SER
00	LSA UNKNOWN	0	0		1
SUBTOTAL:		0	0		1
COMMUNITY MHMR CENTERS					
01	ABILENE REG MHMR CENTER	150	66		262
03	AUSTIN TRAVIS CNTY MHMR CEN	205	60		753
04	CENTER FOR HEALTH CARE SERUS	353	77		1318
05	MHMR AUTH OF BRAZOS VALLEY	101	33		216
06	CENTRAL COUNTIES CEN MHMR	93	82		320
07	CENTRAL PLAINS CWP COH MHMR	40	14		226

Browse Screen Header

Using the above example, the report browse screen displays the report's title (Num Active MR Clients By), current page number (1), total pages of the report (2), line number (1), and the scroll value (5). The COMMAND line is used to key commands to allow you to browse the report.

Initial Location in Report

X/PTR initially accesses all reports at Page 1, Line 1, Column 1. From this point you can scroll or move through the report line by line, screen by screen, or page by page. You can also specify a particular page number or go to the top or bottom of a page.

Exiting a Report

To exit a report and return to the **V:22 Favorites** (reports) menu, press **F3**.

Scroll Value

The SCROLL field is in the upper right corner of every X/PTR screen. Within a report, the scroll amount or value indicates the number of lines the screen will scroll up or down if you press the scroll keys.

Note: The scroll value can be changed at any time by entering a new scroll amount in the SCROLL field. The changed scroll amount will remain in effect until it is changed again.

Scrolling Through a Report

Why Do You Need to Scroll?

Since the default for a standard report display is 80 columns, 22 lines, most mainframe production reports will not fit entirely on a standard workstation screen. X/PTR provides ways to move around within the report by using function (F) keys or entering commands on the COMMAND line of the report you are browsing.

Scrolling through a report allows you to move left or right, up or down, or to a specific page of a report.

Function Keys and Commands

X/PTR assigns function keys and provides commands to perform scrolling tasks. The tables provide a listing of the function keys and commands with a brief description of the scrolling tasks they accomplish.

Function Key	Task Description
F7	Scrolls up the number of lines specified in the scroll field.
F8	Scrolls down the number of lines specified in the scroll field.
F10	Scrolls a full screen to the left.
F11	Scrolls a full screen to the right.
F12	Scrolls down to the top of the next page of the report.

Command	Task Description
BOTTOM	Scrolls to the bottom of the current page.
COL	Assigns any column of a report to display on the left side of your screen.
CSR	Scrolls to the position of the cursor (used as a scroll value).
DOWN	Scrolls down in a report using the scroll amount or can be modified to scroll down a specific number of lines.
LEFT	Scrolls a full screen to the left or can be modified to scroll to the left by a specific number of columns.
PAGE	Scrolls to a specific page in the report.
RIGHT	Scrolls a full screen to the right or can be modified to scroll to the right by a specific number of columns.
RULER	Displays a ruler with a column reference line at the top of the screen display.
TOP	Scrolls to the top of the current page.
UP	Scrolls up in a report using the scroll amount or can be modified to scroll up a specific number of lines.

Using Function Keys to Scroll

Function Keys

The function (**F**) keys and the scrolling tasks they accomplish are described in the following table. Detailed documentation on each function key follows the table.

Function Key	Task Description
F7	Scrolls up the number of lines specified in the scroll field.
F8	Scrolls down the number of lines specified in the scroll field.
F10	Scrolls a full screen to the left.
F11	Scrolls a full screen to the right.
F12	Scrolls down to the top of the next page of the report.

F7 Key

If the lines of a report extend beyond the top edge of your screen display, scrolling up will allow you to view toward the top of the current report being browsed.

Scrolling up in a report can be accomplished by using the **F7** key. Each time you press this key, the display scrolls up the number of lines specified in the **SCROLL** field.

Note: You can also use the **UP** command to scroll up, as described in the *Using Commands to Scroll* section.

F8 Key

If the lines of a report extend beyond the bottom edge of your screen display, scrolling down will allow you to view toward the bottom of the current report being browsed.

Scrolling down in a report can be accomplished by using the **F8** key. Each time you press this key, the display scrolls down the number of lines specified in the **SCROLL** field.

Note: You can also use the **DOWN** command to scroll down, as described in the *Using Commands to Scroll* section.

F10 Key

Since most reports exceed the width of the screen, function keys must be used to view the portion of the report not being displayed.

Scrolling a full screen to the left can be accomplished by pressing the **F10** key.

Note: You can also use the **LEFT** command to scroll a full screen to the left, as described in the *Using Commands to Scroll* section.

Using Function Keys to Scroll, Continued

F11 Key

Scrolling a full screen to the right can be accomplished by pressing the **F11** key.

Note: You can also use the **RIGHT** command to scroll a full screen to the right, as described in the *Using Commands to Scroll* section.

Scrolling Example

A sample report screen is shown below as it is displayed when you select it to browse.

```

J 1 B02: NUM ACTIVE MR CLIENTS BY 11/15/1998 Pg      2 of      3 Line  1
Command ==>                                         Scroll ==> 22

DATE PREPARED: 11-14-98                               T X H H M R
TIME PREPARED: 04:51                                NUMBER OF ACTIVE MR PERSONS
                                                    SNAPSHOT AS OF 11-15-98

-----|-----COMMUNITY SER
LSA*  MR AUTHORITY          CAMPUS RES  COMM RES  CLIENT/FAMIL
-----|-----TOTAL    TOTAL      TOTAL
00    LSA UNKNOWN              0           0           1

SUBTOTAL:              0           0           1

COMMUNITY MHHR CENTERS

01    ABILENE REG MHHR CENTER    150         66         262
03    AUSTIN TRAVIS CNTY MHHR CEN 205         60         753
04    CENTER FOR HEALTH CARE SERVS 353         77        1318
05    MHHR AUTH OF BRAZOS VALLEY  101         33         216
06    CENTRAL COUNTIES CEN MHHR   93          82         320
07    CENTRAL PLAINS CMP COH MHHR  40          14         226
  
```

You must scroll to the right to view the portion of the report not displayed on your screen. If you press **F11**, the display scrolls a full screen to the right. The remaining portion of the sample report screen is shown below.

```

J 1 B02: NUM ACTIVE MR CLIENTS BY 11/15/1998 Pg      2 of      3 Line  1
Command ==>                                         Scroll ==> 22

                                REPORT NO.: HC026350
                                PAGE       :      1

RUVICES-----| COMMUNITY
LY  CASE MGMT  SERVICES  L S A
    TOTAL      TOTAL      TOTAL
-----|-----
      0         1         1
      0         1         1

      7         264        412
     185        866       1858
      51       1391       1596
      31        222        319
     126        375        463
      5         226        226
  
```

Press **F10** to scroll back to the left side of the report.

Using Function Keys to Scroll, Continued

F12 Key

When browsing a report, you may want to advance to the next page. Scrolling forward to the top of the next page of the report can be accomplished by pressing the **F12** key.

Note: You can also use the **PAGE** command to scroll to the next page, as described in the *Using Commands to Scroll* section.

User's Workbook Reference

Lesson 5, Scrolling through a Report

Using Commands to Scroll

Scrolling Commands In addition to function keys, X/PTR provides commands to allow you to scroll through a report. The following table contains an alphabetical listing of these commands with a brief description of the scrolling tasks they accomplish. Detailed documentation on each command follows the table.

Note: To use the commands, you will key the command on the COMMAND line and press <Enter>.

Command	Task
BOTTOM	Scrolls to the bottom of the current page.
COL	Assigns any column of a report to display on the left side of your screen.
CSR	Scrolls to the position of the cursor. <u>Note</u> : This command is entered as a scroll value rather than on the COMMAND line.
DOWN	Scrolls down in a report using the scroll amount or can be modified to scroll down a specific number of lines.
LEFT	Scrolls a full screen to the left or can be modified to scroll to the left by a specific number of columns.
PAGE	Scrolls to a specific page in the report.
RIGHT	Scrolls a full screen to the right or can be modified to scroll to the right by a specific number of columns.
RULER	Displays a ruler with a column reference line at the top of the screen display.
TOP	Scrolls to the top of the current page.
UP	Scrolls up in a report using the scroll amount or can be modified to scroll up a specific number of lines.

BOTTOM
Command

You may be browsing a report and want to see the bottom of your current page to view totals, etc. The **BOTTOM** command allows you to scroll to the bottom of the current page.

Format

BOT
B

Display

The current page is displayed so that the last line of the page is at the bottom of the screen.

Using Commands to Scroll, Continued

COLUMN Command

The **COLUMN** command allows you to assign any column of a report to display on the left side of your screen.

Note: To assist you in identifying the column numbers in a report you are browsing, X/PTR provides a ruler with a column reference line displayed. See the *RULER Command* section for more information on this function.

The column number used in the command can be the specific column to be displayed as the left margin or can be a number to move relative to the current column number displayed. If the command does *not* have a “+” or “-” associated with the column number, the absolute column number is the leftmost display column.

Format

Col <number> or **C <number>**
Col <+number> or **C <+number>**
Col <-number> or **C <-number>**

Examples

The table describes format examples and results.

Format	Result
Col 40	Sets column 40 to display as the left margin.
C +10	Moves the left margin 10 columns to the right of the current column.
Col -15	Moves the left margin 15 columns to the left of the current column.

Canceling the Command

To cancel the **COLUMN** command you have assigned:

- Use the **COLUMN** command **Col 1** to return to column 1
 - *or*
 - Use the **RESET VIEW (RV)** command to reset the display to Page 1, Line 1.
-

Using Commands to Scroll, Continued

CSR Command The **CSR** command is entered as a scroll value rather than on the **COMMAND** line and allows you to scroll to the current position of the cursor. This function is performed using these steps:

- Tab to the **SCROLL** field.
- Key **CSR** in the **SCROLL** field.
- Press **<Enter>**.
- Move the cursor to the report line or column to which you want to scroll using the Down, Up, Left, or Right arrow keys.
- Press **F8** (Down), **F7** (Up), **F10** (Left), or **F11** (Right).

Result: The line or column you indicated is moved to the top, bottom, left, or right, depending on which scroll key is pressed.

Note: **CSR** remains until a new scroll value is entered.

DOWN Command The **DOWN** command allows you to scroll down the number of lines specified in the **SCROLL** field or a certain number of lines that you indicate.

Format **DOWN**
DOWN <number>

Examples The table describes format examples and results.

Format	Result
DOWN	Scrolls down the number of lines specified in the SCROLL field. <u>Note:</u> This function can also be accomplished by pressing the F8 key.
DOWN 20	Scrolls down 20 lines in the report.

Special Feature If you tab to the **SCROLL** field, key a new scroll amount, and then enter the **DOWN** command, you will scroll down in the report using the scroll amount you have designated.

Using Commands to Scroll, Continued

LEFT Command The **LEFT** command allows you to scroll a full screen to the left or scroll to the left a certain number of columns that you indicate.

Format **LEFT** or **L**
LEFT <number> or **L <number>**

Examples The table describes format examples and results.

Command	Result
LEFT	Scrolls to the left in the report by a full screen. <u>Note:</u> This function can also be accomplished by pressing the F10 key.
LEFT 10	Scrolls to the left 10 columns.

PAGE Command The **PAGE** command allows you to scroll to a specific page or to the next page of the report.

The page number used in the command can be the specific page to be displayed or can be a number to move relative to the current page displayed.

Format **PAGE <number>**
PAGE <+number>
PAGE <-number>
PAGE L
PAGE

Examples The table describes format examples and results.

Command	Result
PAGE 5	Scrolls to page 5 of the report.
PAGE +10	Scrolls forward 10 pages from the current page displayed.
PAGE -20	Scrolls backward 20 pages from the current page displayed.
PAGE L	Scrolls to the last page of the report.
PAGE	Scrolls to the next page of the report. <u>Note:</u> This function can also be accomplished by pressing the F12 key.

Using Commands to Scroll, Continued

RIGHT Command The **RIGHT** command allows you to scroll a full screen to the right or scroll to the right a certain number of columns that you indicate.

Format **RIGHT** or **R**
RIGHT <number> or **R <number>**

Examples The table describes format examples and results.

Command	Result
RIGHT	Scrolls to the right in the report by a full screen. <u>Note:</u> This function can also be accomplished by pressing the F11 key.
RIGHT 10	Scrolls to the right 10 columns.

RULER Command X/PTR provides a ruler that displays a column reference line at the top of the screen. Key **RULER** to display the ruler; key **RULER** again to remove the ruler from the display.

Note: This function can also be accomplished by pressing the **F2** key to display the ruler and pressing **F2** again to remove the ruler from the display.

Example The screen example shows the **RULER** command activated.

```

J 1 B02: NUH ACTIVE MR CLIENTS BY 11/15/1998 Pg      3 of      3 Line 1
Command ==>-----10-----20-----30-----40-----50-----60-----70-----8
-----10-----20-----30-----40-----50-----60-----70-----8
DATE PREPARED: 11-14-98                                T X H H R
TIME PREPARED: 04:51                                NUMBER OF ACTIVE MR PERSONS
                                                    SNAPSHOT AS OF 11-15-98

```

LSA*	MR AUTHORITY	CAMPUS RES TOTAL	COMMUNITY COMM RES TOTAL	SER CLIENT/FAMIL TOTAL
42	BALCONES AREA	16	10	146
43	VAL VERDE COUNTY MR	8	5	130
46	BURKE CENTER	9	6	58
51	ELLIS COUNTY	33	17	132
52	ROLLING PLAINS	17	0	46
53	CHILDRESS COUNTY	5	0	11
54	PECOS RIVER/WTCM	13	5	94
55	WICHITA RIVER	22	6	43
56	STEPHENS	6	0	9
57	GRASSLANDS AREA	21	3	58
58	PERMIAN BASIN AT BIG BEND	8	0	21

Using Commands to Scroll, Continued

TOP Command You may be browsing a report and want to see the top of your current page to look at column headings, dates, etc. The **TOP** command allows you to scroll to the top of the current page.

Format **TOP**
T

Display The current page is displayed beginning at Line 1.

UP Command The **UP** command allows you to scroll up the number of lines specified in the **SCROLL** field or a certain number of lines that you indicate.

Format **UP**
UP <number>

Examples The table describes format examples and results.

Command	Result
UP	Scrolls up the number of lines specified in the SCROLL field. <u>Note:</u> This function can also be accomplished by pressing the F7 key.
UP 10	Scrolls up 10 lines in the report.

Special Feature If you tab to the **SCROLL** field, key a new scroll amount, and then enter the **UP** command, you will scroll up in the report using the scroll amount you have designated.

User's Workbook Reference Lesson 5, Scrolling through a Report

Listing Report Versions

Introduction

When a report is created, the resulting generation of that report is called a version. Each version of a report shows when it was created, including the date and time associated with the report.

You may need to review an older version of a report or determine if multiple versions of a report are available for comparison to the current version. X/PTR allows you to view a listing of report versions.

List Report Versions Menu

If you selected Option **S** (List report versions) on the **V:22 Favorites** (reports) menu next to the report for which you want to list versions, a **V10: Report** (versions) menu displays a listing of previous versions of that report. A sample menu is shown below.

```
J 1 U10: Report PRINCIPAL PSY DIAGNOSES TRENDS          Line 1
Command ==>                                           Scroll ==> CSR

Opts: B - Browse  U - Views  PRT - Print
Use END to exit.

Opt Created          Total pages
05/31/2001 11:13      70
02/28/2001 11:12      71
11/30/2000 11:11      77
08/31/2000 10:59      75
***** End of list *****
```

Menu Header

The Menu Header indicates that you are on the **V10: Report** (versions) menu. The menu shows the report name for which you are listing report versions and is specific to the report you selected for listing versions. In the above example, the **V10: Report** header shows the report name: **Principal Psy Diagnoses Trends**.

Listing Report Versions, Continued

Option Identifier The Option Identifier section of the **V10: Report** (versions) menu lists the available options for use with this menu.

The table describes the options available to enter in the OPT column.

Option	Description
B - BROWSE	Browse the particular report version at your workstation. See <i>Displaying a Report</i> in this documentation for detail on this option.
V - VIEWS	List the report views for the particular report version. See <i>Listing Report Views</i> in this documentation for detail on this option.
PRT - PRINT	Print the particular report version. See <i>Printing Reports</i> in this documentation for detail on this option.

The **F3** key assigned for use with this menu can be used to exit the **V10: Report** (versions) menu and return to the **V22: Favorites** (reports) menu.

Screen Field Table The table describes the fields as they are displayed on the screen.

Field	Description
CREATED	Displays the date and time associated with the report.
TOTAL PAGES	Displays the total number of pages in the report.

Listing Report Versions, Continued

Scrolling Through the Versions List

The number of versions of a report to which you have access may exceed the space available on your screen. X/PTR provides commands and function keys (not listed on your screen) for scrolling up and down through the report versions list.

The tables list the commands and function keys and describes the tasks they accomplish.

Command	Task Description
BOTTOM	Displays the last (or bottom) of the versions list. <i>Note:</i> The End of List indicator will <i>not</i> be displayed when this command is used.
FIND	Searches to display specific text. See <i>Using FIND</i> in this documentation for detail on this command.
TOP	Displays the beginning (or top) of the versions list.

Function Key	Task Description
F7	Scrolls up through the list of versions.
F8	Scrolls down through the list of versions.

Retention Period

Reports are maintained in X/PTR for a specified period of time, the report's retention period. The following are examples of how a retention period could be defined: 15 days, 40 days, 100 days, 200 days, and 400 days. After a report's defined retention period has elapsed, X/PTR discontinues tracking the report. When this occurs, you will no longer see that version of the report on your **V10: Report (versions)** menu.

How to Use the V10: Report Menu

To use the **V10: Report (versions)** menu:

- Press <**Tab**> until you are in the OPT column next to the report version you want to browse, print, or list report views.
 - Key the option you have selected in the OPT column.
 - Press <**Enter**>.
-

Listing Report Versions, Continued

Archiving Reports At specified intervals, older versions of a report are archived, or stored on tape. A restoration from tape to disk is necessary to display these report versions in X/PTR. Once a report is restored to disk, you can browse, print, or scroll through it as with any other report.

If a restoration is required to display a report, “*Restore Req'd*” is displayed on the **V10: Report** (versions) menu following the number of pages in the report.

Restoring Reports to Disk Using any of the options shown on the **V10: Report** (versions) menu (**B**, **PRT**, or **V**) initiates the process to restore a report from tape to disk and causes the **R05: Request Restore from Archive** screen to display as shown below.

```
J 1 R05: Request Restore from Archive
Command ==>

Report PERSONS AGE 20< IN RESIDENCE
is not available on disk.

Press ENTER to allow restore of this report from archive.
Press END if you do not want to restore this report from archive.
```

Confirming a Request to Restore The **R05: Request Restore from Archive** screen lets you know that the report you selected (HC024080.M in the example above) is not available on disk. The options provided and their results are:

- Press **<Enter>** to allow restore of this report from archive.
Result: The **V10: Report** (versions) menu is displayed with a “*Restore in process*” message as shown on the next page.
 - Press **F3** if you do *not* want to restore this report from archive.
Result: The **V10: Report** (versions) menu is displayed.
-

Listing Report Versions, Continued

Restore in Process The restore process normally takes approximately 2 to 5 minutes, depending on the size of the report and available computer resources. You can continue to perform other tasks within X/PTR while the restore is in process.

The **V10: Report** (versions) menu displaying the “*Restore in process*” message is shown in the example below.

```
J 1 V10: Report PERSONS AGE 20K IN RESIDENCE          Restore in process
Command ==>                                         Scroll ==> CSR

Opts: B - Browse  U - Views  PRT - Print

Use END to exit.

Opt Created                Total pages
04/30/2001 02:31            24
03/31/2001 04:25            25
02/28/2001 02:46            25
01/31/2001 02:44            22 RESTORE REQD
12/31/2000 02:31            23 RESTORE REQD
11/30/2000 03:41            26 RESTORE REQD
10/31/2000 02:00            24 RESTORE REQD
***** End of list *****
```

Restore Completion When the report has been restored, a “*SYSOUT RESTORED*” message is displayed on Line 3 of your current screen.

User’s Workbook Reference Lesson 3, Accessing a Report

Printing Reports

Overview

X/PTR allows you to print reports on your local VPS defined printer. Through X/PTR you are able to print a complete report, or you can choose to print selected pages and lines of a report.

Printing requests can begin:

- from any screen that lists reports or report versions *or*
 - while you are browsing a report *or*
 - from any screen that lists report views.
-

Printing Locations and Commands

X/PTR allows you to print an entire report or selected pages and lines of a report from the **V22: Favorites** (reports) menu that lists reports or from the **V10: Report** (versions) menu that lists report versions.

PRT (Print) is listed as an option to enter in the OPT field on these menus. Although not listed as an available option, **P?** can also be entered to allow the selected report to print. You can initiate a print request for more than one report by entering the print option next to each report you want to print.

X/PTR also allows you to print an entire report or selected pages and lines of a report from the **B02: (report name)** screen while you are browsing the report.

PRT or **P?** can be entered on the COMMAND line of a report while you are browsing it to allow you to print. You can also press the **F4** key while you are browsing a report to allow you to print. Pressing the **F4** key functions identically to entering the **PRT** command.

X/PTR also allows you to print an entire report or selected pages and lines of a report to which you have applied a temporary or permanent view. (See *Temporary Views* and *Permanent Views* for information on creating temporary and permanent views.)

When a temporary or permanent view is applied while you are browsing a report, that report can be printed with the view applied by entering **PRT** or **P?** on the COMMAND line of the report *or* by pressing the **F4** key. Also, when a permanent view has been created and you have indicated on the **V18: Report** (View Definition) screen that the view should apply to print, that view can be printed from the **V17: Report** (Available Report Views) screen. **PRT/P?** is listed as an option to enter in the OPT field next to the view you want to print.

Printing Reports, Continued

P07: Print Screen

If you initiated a print request from the **V22: Favorites** (reports) menu or the **V10: Report** (versions) menu and the print confirmation is set to **YES**, the first print modification screen to display is the **P07: Print** screen. A sample **P07: Print** screen is shown below.

```
J 1 P07: Print MH CLIENTS AVERAGE LOS          05/31/2001  >
Command ==>
Commands:  CAN - Cancel    DUR - Drivers

Leave page and line numbers blank to print all.
From page ==>           Line ==>
To page  ==>           Line ==>

Banner page name      ==>
Banner page ID       ==>
Combine print requests ==> NO  (yes/no)
Output driver         ==> PL01
Confirm print requests ==> YES (yes,no,first time)

The indexing values may be used to select a section of a report based on the
content and the person that normally receives it.  If these values are omitted
you will receive your normal section of the report.
Index name            ==>
Index selection data  ==>
```

Screen Header

The Screen Header indicates that you are on the **P07: Print** screen. The screen shows the specific report name that you selected for printing. In the above example, the **P07: Print** screen header shows the following report name: **MH Clients Average LOS**.

Screen Fields

The **P07: Print** screen contains fields you can use to indicate printing specifications for the report you have selected to print. These fields display default information or are optional.

Printing Reports, Continued

Screen Field Table The table describes the fields as displayed on the **P07: Print** screen.

Field	Type	Description
FROM PAGE	Optional	Key the beginning page number of the section of the report you want to print. If you are printing the entire report, leave this field blank.
(From) LINE	Optional	Key the beginning line number of the section of the report you want to print. If you are printing the entire report, leave this field blank.
TO PAGE	Optional	Key the ending page number of the section of the report you want to print. If you are printing the entire report, leave this field blank.
(To) LINE	Optional	Key the ending line number of the section of the report you want to print. If you are printing the entire report, leave this field blank.
BANNER PAGE NAME	Optional	Your USER ID is the default in this field. You can key your name, report name, or any other word (limited to eight characters) to print on a cover page to help you identify your report at the printer.
BANNER PAGE ID		This field is <i>not</i> used.
COMBINE PRINT REQUESTS (YES, NO)	Displayed/Optional	NO is the default in this field. For this field, you can: <ul style="list-style-type: none"> • Accept the NO default and your print requests will be processed as they are received. • Key YES to combine your print requests if you need to print more than one report. <u>Note:</u> X/PTR holds all printing until you key NO in this field at your last print command <i>or</i> until you exit X/PTR.
OUTPUT DRIVER	Displayed	PL01 is the default in this field. <u>Note:</u> Your output driver has been set up through your Print Profile options.
CONFIRM PRINT REQUESTS (YES, NO, FIRST TIME)	Displayed/Optional	YES is the default in this field. For this field, you can: <ul style="list-style-type: none"> • Accept the YES default if you want to confirm print requests and see the P07: Print screen each time you print <i>or</i> • Key NO if you do <i>not</i> want to confirm print requests and see the P07: Print screen each time you print <i>or</i> • Key FIRST if you only want to confirm print requests and see the P07: Print screen the <i>first time</i> in this X/PTR session.
INDEX NAME		This field is <i>not</i> used.
INDEX SELECTION DATA		This field is <i>not</i> used.

Printing Reports, Continued

P06: Print Screen

If you entered **PRT** or **P?** on the **COMMAND** line of a **B02: (report name)** browse screen or pressed the **F4** key, the first print modification screen to display is the **P06: Print** screen.

Note: Since the **P06: Print** and the **P07: Print** screens are similar in format and use and differ only by screen number and indexing values, references to the **P07: Print** screen in this documentation also hold for the use of the **P06: Print** screen. For an explanation of the **P06: Print** screen, refer to the previously defined **P07: Print** field descriptions. A sample **P06: Print** screen is shown below.

```
J 1 P06: Print CLIENT ASGHT REPORT                                05/31/2001  >
Command ==>
Commands:  CRR - Cancel      DUR - Drivers

Leave page and line numbers blank to print all.
From page ==>      Line ==>
To page  ==>      Line ==>

Banner page name      ==>
Banner page ID        ==>
Combine print requests ==> NO  (yes/no)
Output driver         ==>
Confirm print requests ==> YES (yes,no,first time)
```

P14: Print Screen

While browsing a report with a temporary or permanent view applied and a **PRT** or **P?** is entered on the **COMMAND** line of the browse screen or the **F4** key is pressed, the first print modification screen to display is the **P14: Print** screen. This screen is also displayed if you entered **PRT** or **P?** as an option in the **OPT** field on the **V17: Report (Available Report Views)** screen.

Since the **P14: Print** and the **P07: Print** screens are identical in format except for one additional field on the **P14: Print** screen, references to the **P07: Print** screen in this documentation also hold for the use of the **P14: Print** screen.

continued on next page

Printing Reports, Continued

P14: Print Screen,
continued

A sample **P14: Print** screen is shown below followed by a description of the field that is additional to the fields on the **P07: Print** screen.

```
J 1 P14: Print NUM ACTIVE MH CLIENTS BY LSA      12/12/2001    u:
Command ==>
Commands:  CAN - Cancel    DUR - Drivers

Leave page and line numbers blank to print all.
From page ==>      Line ==>
To page  ==>      Line ==>

Banner page name    ==>
Banner page ID     ==>
Combine print requests ==> NO    (yes/no)
Output driver      ==> PL01
Confirm print requests ==> YES   (yes,no,first time)
Output Reformatting ==> YES   (yes/no - use current SC HDR etc... settings)
```

For an explanation of the **P14: Print** screen, refer to the previously defined **P07: Print** field descriptions and see the description of the additional field below.

Field	Type	Description
OUTPUT REFORMATTING (YES, NO)	Displayed/ Optional	YES is the default in this field. For this field, you can: <ul style="list-style-type: none">• Accept the YES default if you want to have the view applied to the printing of the report.• Key NO if you do <i>not</i> want to have the view applied to the printing of the report.

Printing Reports, Continued

P20: Print Characteristics Screen

The **P20: Print Characteristics** screen is provided to allow you to indicate a print destination and the number of copies of the report you want to print. The output driver (PL01-held or PL02-not held) is displayed as it was specified on the **P07: Print** screen.

The **P20: Print Characteristics** screen will always be displayed following the **P07: Print** screen even if no changes are necessary. When your print request is completed or cancelled, you are returned to the menu or screen from which you issued the commands. A sample **P20: Print Characteristics** screen is shown below.

```
J 1 P20: Print Characteristics                               Line 1
Command ==>                                              Scroll ==> CSR
PAGES SELECTED: 1
Commands: CAN - Cancel F - Find

Output driver: PL01
Press ENTER then END key when all modifications are complete

Parameter      Value
DEST           * PRT021
COPIES         * 001
***** End of list *****
```

Screen Field Table

The table describes the fields as they are displayed on the **P20: Print Characteristics** screen.

Field	Description
DEST	Displays the six-character Printer ID of your local VPS defined printer. <u>Note:</u> The data in this field is supplied by the options you set up for your Print Profile and can be changed.
COPIES	Key the number of copies of the report you want to print.

Printing Reports, Continued

Confirming Print Requests

The **P07: Print** screen contains a CONFIRM PRINT REQUESTS field that is critical to all print requests you make. **YES** is the default for this field, but you can enter **YES**, **NO**, or **FIRST**. It is important to know what has been entered in this field if you need to display the screens for any printing modifications. Possible Confirm Print Requests and their results are described below.

If CONFIRM PRINT REQUESTS is	Result
Yes	The P07: Print and P20: Print Characteristics screens will be displayed each time you print, allowing you to make any printing modifications before printing is accomplished.
No	The P07: Print and P20: Print Characteristics screens will <i>not</i> be displayed each time you print. Printing will be accomplished without the display of modification screens.
First	The P07: Print and P20: Print Characteristics screens will be displayed <i>the first time</i> in this X/PTR session. These screens will <i>not</i> be displayed for any subsequent printing.

When Print Screens Will Display

When you have selected a report to be printed, you will need to know if modification screens will display to allow you to make any changes to the print parameters before the printing is accomplished. X/PTR provides a **P07: Print** screen for print specifications followed by a **P20: Print Characteristics** screen.

If you use **P?** to print, these two modification screens will *always* display. Whether these screens display when you use **PRT** or press **F4** depends on the status of the CONFIRM PRINT REQUESTS field on the **P07: Print** screen.

The screen flow for printing requests made from within a report is the same as from a list of reports except that the **P06: Print** screen is displayed instead of the **P07: Print** screen. Pressing the **F4** key while within a report causes the same screen flow as using the **PRT** option.

Printing Reports, Continued

Screen Flow When Using PRT The table describes the screen flow that takes place when you use the **PRT** option.

If you key...	and...	then...
PRT	CONFIRM PRINT REQUESTS is Yes	<p>the P07: Print screen is displayed.</p> <div data-bbox="664 464 1281 892" style="border: 1px solid black; padding: 5px;"> <pre> J 1 P07: Print MH CLIENTS AVERAGE LOS 05/31/2001 > Command ==> Commands: CAN - Cancel DVR - Drivers Leave page and line numbers blank to print all. From page ==> Line ==> To page ==> Line ==> Banner page name ==> Banner page ID ==> Combine print requests ==> NO (yes/no) Output driver ==> Confirm print requests ==> YES (yes,no,first time) The indexing values may be used to select a section of a report based on the content and the person that normally receives it. If these values are omitted you will receive your normal section of the report. Index name ==> Index selection data ==> </pre> </div> <p>When your print specifications are entered, the P20: Print Characteristics screen is displayed.</p> <div data-bbox="664 999 1281 1428" style="border: 1px solid black; padding: 5px;"> <pre> J 1 P20: Print Characteristics Line 1 Command ==> Scroll ==> CSR PAGES SELECTED: 1 Commands: CAN - Cancel F - Find Output driver: PL01 Press ENTER then END key when all modifications are complete Parameter Value DEST * PRT021 COPIES * 001 ***** End of list ***** </pre> </div> <p>When all processing is completed, the menu/screen from which you initiated the print request is displayed.</p>

continued on next page

Printing Reports, Continued

Screen Flow When Using PRT, continued

If you key...	and...	then...
PRT	CONFIRM PRINT REQUESTS is First	<p>the P07: Print screen is displayed the <i>first</i> time in this X/PTR session. Any subsequent printing will <i>not</i> display this screen.</p> <div data-bbox="716 457 1333 884" style="border: 1px solid black; padding: 5px;"> <pre> J 1 P07: Print MH CLIENTS AVERAGE LOS 05/31/2001 > Command ==> Commands: CAN - Cancel DUR - Drivers Leave page and line numbers blank to print all. From page ==> Line ==> To page ==> Line ==> Banner page name ==> Banner page ID ==> Combine print requests ==> NO (yes/no) Output driver ==> Confirm print requests ==> YES (yes,no,first time) The indexing values may be used to select a section of a report based on the content and the person that normally receives it. If these values are omitted you will receive your normal section of the report. Index name ==> Index selection data ==> </pre> </div> <p>When your print specifications are entered, the P20: Print Characteristics screen is displayed. The P20: Print Characteristics screen is displayed the <i>first</i> time in this X/PTR session. Any subsequent printing will <i>not</i> display this screen.</p> <div data-bbox="716 1045 1333 1472" style="border: 1px solid black; padding: 5px;"> <pre> J 1 P20: Print Characteristics Line 1 Command ==> Scroll ==> CSR PAGES SELECTED: 1 Commands: CAN - Cancel F - Find Output driver: PL01 Press ENTER then END key when all modifications are complete Parameter Value DEST * PRT021 COPIES * 001 ***** End of list ***** </pre> </div> <p>When all processing is completed, the menu/screen from which you initiated the print request is displayed.</p>
PRT	CONFIRM PRINT REQUESTS is No	<p>The P07: Print and P20: Print Characteristics screens will <i>not</i> be displayed. Printing will be accomplished without the display of modification screens.</p>

Printing Reports, Continued

Screen Flow When Using P? The table describes the screen flow that takes place when you use the P? feature.

If you key...	then...
P?	<p>the P07: Print screen is displayed.</p> <pre data-bbox="711 443 1328 869"> J 1 P07: Print MH CLIENTS AVERAGE LOS 05/31/2001 > Command ==> Commands: CAN - Cancel DUR - Drivers Leave page and line numbers blank to print all. From page ==> Line ==> To page ==> Line ==> Banner page name ==> Banner page ID ==> Combine print requests ==> NO (yes/no) Output driver ==> Confirm print requests ==> YES (yes,no,first time) The indexing values may be used to select a section of a report based on the content and the person that normally receives it. IF these values are omitted you will receive your normal section of the report. Index name ==> Index selection data ==> </pre> <p>When your print specifications are entered, the P20: Print Characteristics screen is displayed.</p> <pre data-bbox="711 961 1328 1381"> J 1 P20: Print Characteristics Line 1 Command ==> Scroll ==> CSR PAGES SELECTED: 1 Commands: CAN - Cancel F - Find Output driver: PL01 Press ENTER then END key when all modifications are complete Parameter Value DEST * PRT021 COPIES * 001 ***** End of list ***** </pre> <p>When all processing is completed, the menu/screen from which you initiated the print request is displayed.</p>

Printing Reports, Continued

How to Begin a Print Request

To begin a print request:

- From the **V22: Favorites** (reports) menu or the **V10: Report** (versions) menu, use **PRT** or **P?** to initiate a printing request.

Result: The **P07: Print** screen is displayed.

or

From the **B02: (report name)** report browse screen, use **PRT**, **P?** or **F4** to initiate a printing request.

Result: The **P06: Print** screen is displayed.

- Press **<Tab>** until you are at those fields on the **Print** screen that you want to change.
- Key any changes you want to make.
- Press **<Enter>** when all of your changes have been made or if you accept the print specifications for your report as they are displayed on the **Print** screen.

Result: The **P20: Print Characteristics** screen is displayed.

Printing Part of a Report

If you only need to print a section of a report, you can use the **P07: Print** or **P06: Print** screen to limit your print request.

- Key the beginning page and/or line numbers in the FROM PAGE and LINE fields.
 - Key the ending page and/or line numbers in the TO PAGE and LINE fields.
-

Printing Reports, Continued

How to Cancel
P07: Print or
P06: Print

The **CANCEL** command is provided for use with the **P07: Print** and **P06: Print** screen. To cancel your print request:

- Key **CAN** on the **COMMAND** line.
- Press **<Enter>**.

Result: The menu or screen from which you initiated the print request is displayed with the message “*Print cancelled*” in the upper right corner of the screen, as shown in the following example using the **V22: Favorites** (reports) menu.

```
J 1 U22: Favorites                                     Print cancelled
Command ==>                                           Scroll ==> CSR

Commands: PRO - Update Favorites (via Profile)
Options:  B - Display on terminal
          S - List report versions      U - List report views
          PRT - Print

Use END command to exit.

Opt Entry      Title
HC022280.Q     ACTIVE CLIENTS
HC022140.Q     CLIENT ASGMT REPORT
HC021130.Q     CLIENT CHARACT TRENDS AGE & PROB
HC022260.Q     MH CLIENTS AVERAGE LOS
HC021160.Q     MH CLIENTS SEX & ETHNICITY
HC021161.Q     MH CLIENTS SEX & ETHNICITY
HC027245.M     MH PERSONS SERVED REPORT
HC027245.Q     MH PERSONS SERVED REPORT
HC028855.M     MR CLIENTS BY RES TYPE BY COMP
HC021164.Q     MR CLIENTS SEX & ETH(CAMP)
HC021165.Q     MR CLIENTS SEX & ETH(COMM)
HC021162.Q     MR CLIENTS SEX & ETHNICITY
HC021163.Q     MR CLIENTS SEX & ETHNICITY
```

Printing Reports, Continued

How to Continue Your Print Request

To continue your print request:

- Complete all modifications on the **P20: Print Characteristics** screen.
- Press **<Enter>**.
- Press the **F3** key.

Result: The menu or screen from which you initiated the print request is displayed immediately with the message *“Printed”* in the upper right corner of the screen, as shown in the following example using the **V22: Favorites** (reports) menu.

```
J 1 V22: Favorites                               Printed
Command ==>                                     Scroll ==> CSR

Commands: PRO - Update Favorites (via Profile)
Options:  B - Display on terminal
          S - List report versions      U - List report views
          PRT - Print

Use END command to exit.

Opt Entry      Title
HC022280.Q     ACTIVE CLIENTS
HC022140.Q     CLIENT ASGMT REPORT
HC021130.Q     CLIENT CHARACT TRENDS AGE & PROB
HC022260.Q     MH CLIENTS AVERAGE LOS
HC021160.Q     MH CLIENTS SEX & ETHNICITY
HC021161.Q     MH CLIENTS SEX & ETHNICITY
HC027245.M     MH PERSONS SERVED REPORT
HC027245.Q     MH PERSONS SERVED REPORT
HC028855.M     MR CLIENTS BY RES TYPE BY COMP
HC021164.Q     MR CLIENTS SEX & ETH(CAMP)
HC021165.Q     MR CLIENTS SEX & ETH(COMM)
HC021162.Q     MR CLIENTS SEX & ETHNICITY
HC021163.Q     MR CLIENTS SEX & ETHNICITY
```

How to Cancel P20: Print Characteristics

The **Cancel (CAN)** command is provided for use with the **P20: Print Characteristics** screen. To cancel the print option:

- Key **CAN** on the COMMAND line.
- Press **<Enter>**.

Result: The print request is cancelled. The menu or screen from which you initiated the print request is displayed with the message *“Update cancelled”* in the upper right corner of the screen, as shown in the following example using the **V22: Favorites** (reports) menu.

```
J 1 V22: Favorites                               Update cancelled
Command ==>                                     Scroll ==> CSR

Commands: PRO - Update Favorites (via Profile)
Options:  B - Display on terminal
          S - List report versions      U - List report views
          PRT - Print

Use END command to exit.

Opt Entry      Title
HC022280.Q     ACTIVE CLIENTS
HC022140.Q     CLIENT ASGMT REPORT
HC021130.Q     CLIENT CHARACT TRENDS AGE & PROB
HC022260.Q     MH CLIENTS AVERAGE LOS
HC021160.Q     MH CLIENTS SEX & ETHNICITY
HC021161.Q     MH CLIENTS SEX & ETHNICITY
HC027245.M     MH PERSONS SERVED REPORT
HC027245.Q     MH PERSONS SERVED REPORT
HC028855.M     MR CLIENTS BY RES TYPE BY COMP
HC021164.Q     MR CLIENTS SEX & ETH(CAMP)
HC021165.Q     MR CLIENTS SEX & ETH(COMM)
HC021162.Q     MR CLIENTS SEX & ETHNICITY
HC021163.Q     MR CLIENTS SEX & ETHNICITY
```

Print Process Examples

Print Requests

The following examples of print requests describe the print process.

Example 1

You are at the **V22: Favorites** (reports) menu that lists reports and want to print one copy of an entire report using the **PRT** option with the CONFIRM PRINT REQUESTS field set to “Yes”.

- Press **<Tab>** until you get to the OPT field next to the report you want to print.
- Key **PRT** as shown in the example below.

```
J 1 V22: Favorites                               Line 1
Command ==>                                     Scroll ==> CSR

Commands: PRO - Update Favorites (via Profile)
Options:  B - Display on terminal
          S - List report versions      U - List report views
          PRT - Print

Use END command to exit.

Opt Entry      Title
HC022280.Q     ACTIVE CLIENTS
HC022140.Q     CLIENT ASCMT REPORT
HC021130.Q     CLIENT CHARACT TRENDS AGE & PROB
HC022260.Q     MH CLIENTS AVERAGE LOS
HC021160.Q     MH CLIENTS SEX & ETHNICITY
HC021161.Q     MH CLIENTS SEX & ETHNICITY
PRT HC027245.M MH PERSONS SERVED REPORT
HC027245.Q     MH PERSONS SERVED REPORT
HC028855.M     MR CLIENTS BY RES TYPE BY COMP
HC021164.Q     MR CLIENTS SEX & ETH(CAMP)
HC021165.Q     MR CLIENTS SEX & ETH(COMM)
HC021162.Q     MR CLIENTS SEX & ETHNICITY
HC021163.Q     MR CLIENTS SEX & ETHNICITY
```

- Press **<Enter>**.

Result: The **P07: Print** screen is displayed as shown in the example below.

```
J 1 P07: Print MH PERSONS SERVED REPORT          12/12/2001  4
Command ==>
Commands: CAN - Cancel      DUR - Drivers

Leave page and line numbers blank to print all.
From page ==>              Line ==>
To page   ==>              Line ==>

Banner page name           ==>
Banner page ID             ==>
Combine print requests     ==> NO (yes/no)
Output driver              ==> PL01
Confirm print requests     ==> YES (yes,no,first time)

The indexing values may be used to select a section of a report based on the
content and the person that normally receives it. If these values are omitted
you will receive your normal section of the report.
Index name                 ==>
Index selection data       ==>
```

- There are no changes to be made to the defaults, so you accept them as they are displayed on the **P07: Print** screen.

continued on next page

Print Process Examples, Continued

Print Request Example 1, continued

- Press **<Enter>**.

Result: The **P20: Print Characteristics** screen is displayed as shown in the example below.

```
J 1 P20: Print Characteristics                               Line 1
Command ==>                                              Scroll ==> CSR
PAGES SELECTED:      2
Commands:  GAN - Cancel  F - Find

Output driver: PL01
Press ENTER then END key when all modifications are complete

Parameter      Value
DEST           * PRT021
COPIES         * 001
***** End of list *****
```

- You want one copy of the report at the designated print destination, so you accept the defaults as they are displayed on the **P20: Print Characteristics** screen.
- Press **<Enter>**.
- Press **F3**.

Result: The **V22: Favorites** (reports) menu is displayed with a “Printed” message in the upper right corner as shown in the example below.

```
J 1 U22: Favorites                                       Printed
Command ==>                                              Scroll ==> CSR

Commands: PRO - Update Favorites (via Profile)
Options:  B - Display on terminal
          S - List report versions  U - List report views
          PRT - Print

Use END command to exit.

Opt Entry      Title
HC022280.Q     ACTIVE CLIENTS
HC022140.Q     CLIENT ASGMT REPORT
HC021130.Q     CLIENT CHARACT TRENDS AGE & PROB
HC022260.Q     MH CLIENTS AVERAGE LOS
HC021160.Q     MH CLIENTS SEX & ETHNICITY
HC021161.Q     MH CLIENTS SEX & ETHNICITY
HC027245.H     MH PERSONS SERVED REPORT
HC027245.Q     MH PERSONS SERVED REPORT
HC028855.H     MR CLIENTS BY RES TYPE BY COMP
HC021164.Q     MR CLIENTS SEX & ETH(CAMP)
HC021165.Q     MR CLIENTS SEX & ETH(COMM)
HC021162.Q     MR CLIENTS SEX & ETHNICITY
HC021163.Q     MR CLIENTS SEX & ETHNICITY
```

Print Process Examples, Continued

Print Request Example 2

You are at the **V10: Report** (versions) menu and want to print two copies of a specific section of a report (pages 5-10) with the CONFIRM PRINT REQUESTS field set to "No". Since you need to make printing modifications, you will need to use the **P?** feature to display the modification screens.

- Press <Tab> until you get to the OPT field next to the report you want to print.
- Key **P?** as shown in the example below.

```
J 1 V10: Report MR CLIENTS BY RES TYPE BY COMP          Line 1
Command ==>                                           Scroll ==> CSR

Opts: B - Browse  U - Views  PRT - Print

Use END to exit.

Opt Created                Total pages
P? 08/31/2001 13:49         62
   05/31/2001 13:49         62
   02/28/2001 13:47         62
   11/30/2000 13:46         69
***** End of list *****
```

- Press <Enter>.
Result: The **P07: Print** screen is displayed.
- Press <Tab> to get to the FROM PAGE field and key **5** as shown in the example below.
- Press <Tab> to get to the TO PAGE field and key **10** as shown in the example below.

```
J 1 P07: Print MR CLIENTS BY RES TYPE BY COMP          08/31/2001  4
Command ==>
Commands: CAN - Cancel  DUR - Drivers

Leave page and line numbers blank to print all.
From page ==> 5      Line ==>
To page   ==> 10     Line ==>

Banner page name      ==>
Banner page ID        ==>
Combine print requests ==> NO  (yes/no)
Output driver         ==> PL01
Confirm print requests ==> NO  (yes,no,first time)

The indexing values may be used to select a section of a report based on the
content and the person that normally receives it.  If these values are omitted
you will receive your normal section of the report.
Index name            ==>
Index selection data  ==>
```

- Press <Enter>.
Result: The **P20: Print Characteristics** screen is displayed.

continued on next page

Print Process Examples, Continued

Print Request Example 2, continued

- You want two copies of the report at the designated print destination, so you press **<Tab>** to get to the COPIES field and key **002** as shown in the example below.

```
J 1 P20: Print Characteristics                               Line
Command ==>                                              Scroll ==> CSR
PAGES SELECTED:
Commands:  CAN - Cancel  F - Find

Output driver: PL01
Press ENTER then END key when all modifications are complete

Parameter      Value
DEST           * PRT021
COPIES         * 002
***** End of list *****
```

- Press **<Enter>**.
- Press **F3**.

Result: The **V10: Report** (versions) menu is displayed with a “*Printed*” message in the upper right corner as shown in the example below.

```
J 1 V10: Report MR CLIENTS BY RES TYPE BY COMP           Printed
Command ==>                                             Scroll ==> CSR

Opts:  B - Browse  U - Views  PRT - Print

Use END to exit.

Opt Created      Total pages
08/31/2001 13:49      62
05/31/2001 13:49      62
02/28/2001 13:47      62
11/30/2000 13:46      69
***** End of list *****
```

Print Process Examples, Continued

Print Request Example 3

You are within a report at the report's **B02** browse screen and want to print a copy of the entire report using **PRT** with the CONFIRM PRINT REQUESTS set to "Yes". You want to combine this print request with other requests you plan to make later in the day.

- Key **PRT** on the COMMAND line as shown in the example below.

```
J 1 B02: NUM ACTIVE MH CLIENTS BY 12/12/2001 Pg 1 of 2 Line 1
Command ==> PRT Scroll ==> 7

DATE PREPARED: 11-14-98 T X M H H R
TIME PREPARED: 04:51 NUMBER OF ACTIVE MH PERSONS
SNAPSHOT AS OF 11-15-98
```

LSA*	MH AUTHORITY	CAMPUS RES TOTAL	COMM RES TOTAL	COMMUNITY CLIENT/FAMIL TOTAL	SER
00	LSA UNKNOWN	0	0		1
SUBTOTAL:		0	0		1
COMMUNITY MHMR CENTERS					
01	ABILENE REG MHMR CENTER	17	1		922
02	TEXAS PANHANDLE MH AUTHORITY	27	21		1708
03	AUSTIN TRAVIS CNTY MHMR CEN	78	22		3069
04	CENTER FOR HEALTH CARE SERUS	293	30		4576
05	MHMR AUTH OF BRAZOS VALLEY	17	34		1157
06	CENTRAL COUNTIES CEN MHMR	34	17		1508

- Press **<Enter>**.
Result: The **P06: Print** screen is displayed.
- Press **<Tab>** to get to the COMBINE PRINT REQUESTS field and key **Yes** as shown in the example below.

```
J 1 P06: Print NUM ACTIVE MH CLIENTS BY LSA 12/12/2001 4 :
Command ==>
Commands: CAN - Cancel DUR - Drivers

Leave page and line numbers blank to print all.
From page ==> Line ==>
To page ==> Line ==>

Banner page name ==>
Banner page ID ==>
Combine print requests ==> YES (yes/no)
Output driver ==> PL01
Confirm print requests ==> YES (yes,no,first time)
```

continued on next page

Print Process Examples, Continued

Print Request Example 3, continued

- Press **<Enter>**.

Result: The **P20: Print Characteristics** screen is displayed as shown in the example below.

```
J 1 P20: Print Characteristics                               Line 1
Command ==>                                               Scroll ==> CSR
PAGES SELECTED:      2
Commands:  CAN - Cancel  F - Find

Output driver: PL01
Press ENTER then END key when all modifications are complete

Parameter      Value
DEST           * PRT021
COPIES        * 001
***** End of list *****
```

- You want one copy of the report at the designated print destination, so you accept the defaults as they are displayed on the **P20: Print Characteristics** screen.
- Press **<Enter>**.
- Press **F3**.

Note: For this example, to allow the reports to print, you must either key **No** in the COMBINE PRINT REQUESTS field on the **P06: Print** screen or exit X/PTR.

Result: The **B02** screen is displayed with a “Printed” message in the upper right corner as shown in the example below.

```
J 1 B02: NUM ACTIVE MH CLIENTS BY 12/12/2001             Printed
Command ==>                                             Scroll ==> 7
DATE PREPARED: 11-14-98                                T X H H R
TIME PREPARED: 04:51                                  NUMBER OF ACTIVE MH PERSONS
                                                         SHAPSHOT AS OF 11-15-98

LSA*  MH AUTHORITY          CAMPUS RES  |-----COMMUNITY  SER
-----TOTAL              CONM RES    |-----CLIENT/FAMIL
-----TOTAL              TOTAL        |-----TOTAL

00  LSA UNKNOWN              0           | 0           | 1
SUBTOTAL:                    0           | 0           | 1

COMMUNITY MHMR CENTERS

01  ABILENE REG MHMR CENTER  17          | 1           | 922
02  TEXAS PANHANDLE MH AUTHORITY  27         | 21          | 1708
03  AUSTIN TRAVIS CNTY MHMR CEN   78         | 22          | 3069
04  CENTER FOR HEALTH CARE SERVS  293        | 30          | 4576
05  MHMR AUTH OF BRAZOS VALLEY    17         | 34          | 1157
06  CENTRAL COUNTIES CEN MHMR    34         | 17          | 1500
```

Print Process Examples, Continued

Print Request Example 4

You are viewing a report for which a permanent view has been created and want to print one copy of the entire report with the view applied.

- Key **PRT** on the COMMAND line as shown in the example below.

```
J 1 B02: NUM ACTIVE MH CLIENTS BY 12/12/2001 Pg 1 of 2 Line 11
Command ==> PRT Scroll ==> 5
Number of Active MH Persons
Snapshot as of 11/15/98

DATE PREPARED: 11-14-98 T
TIME PREPARED: 04:51 NUMBER
SNAP

LSA* MH AUTHORITY CAMPUS RES
-----
00 LSA UNKNOWN 0

SUBTOTAL: 0

COMMUNITY MHMR CENTERS

01 ABILENE REG MHMR CENTER 17
02 TEXAS PANHANDLE MH AUTHORITY 27
03 AUSTIN TRAVIS CNTY MHMR CEN 78
04 CENTER FOR HEALTH CARE SERVS 293
```

- Press **<Enter>**.

Result: The **P14: Print** screen is displayed as shown in the example below.

```
J 1 P14: Print NUM ACTIVE MH CLIENTS BY LSA 12/12/2001 u:
Command ==>
Commands: CAN - Cancel DUR - Drivers

Leave page and line numbers blank to print all.
From page ==> Line ==>
To page ==> Line ==>

Banner page name ==>
Banner page ID ==>
Combine print requests ==> NO (yes/no)
Output driver ==> PL01
Confirm print requests ==> YES (yes,no,first time)
Output Reformatting ==> YES (yes/no - use current SC HDR etc... settings)
```

- There are no changes to be made to the defaults, so you accept them as they are displayed on the **P14: Print** screen.

continued on next page

Print Process Examples, Continued

Print Request Example 4, continued

- Press **<Enter>**.

Result: The **P20: Print Characteristics** screen is displayed as shown in the example below.

```
J 1 P20: Print Characteristics                               Line 1
Command ==>                                              Scroll ==> CSR
PAGES SELECTED: 2
Commands: CAN - Cancel  F - Find

Output driver: PL01
Press ENTER then END key when all modifications are complete

Parameter      Value
DEST           * PRT021
COPIES         * 001
***** End of list *****
```

- You want one copy of the report at the designated print destination, so you accept the defaults as they are displayed on the **P20: Print Characteristics** screen.
- Press **<Enter>**.
- Press **F3**.

Result: The **B02** screen is displayed with a “Printed” message in the upper right corner as shown in the example below.

```
J 1 B02: NUM ACTIVE MH CLIENTS BY 12/12/2001             Printed
Command ==>                                              Scroll ==> 5
Number of Active MH Persons
Snapshot as of 11/15/98

DATE PREPARED: 11-14-98                                T
TIME PREPARED: 04:51                                  NUMBER
                                                         SNAP

LSA*  MH AUTHORITY          CAMPUS RES
-----
00   LSA UNKNOWN              0

SUBTOTAL:                                0

COMMUNITY MHMR CENTERS

01   ABILENE REG MHMR CENTER    17
02   TEXAS PANHANDLE MH AUTHORITY 27
03   AUSTIN TRAVIS CNTY MHMR CEN 78
04   CENTER FOR HEALTH CARE SERUS 293
```

User's Workbook
Reference

Lesson 6, Printing a Report

Creating a Report View

Overview

A report “view” is a reconstructed format of the original report text and relates to how the report is displayed on your screen. X/PTR allows you to create your own layout for a report by displaying only the lines or columns you want to see, rearranging data, freezing data, and setting headers.

Views can be created every time you browse a report or can be saved and retrieved at various intervals. Applying your view to a report does not effect how someone else views the report.

Temporary and Permanent Views

X/PTR allows you to create a *temporary* view which will terminate when you exit the browse command. A *permanent* view may be created and saved, allowing you to retrieve the view whenever you need it.

To set up a temporary view, a separate command for each specification of the view is required. The permanent view uses a single command which then displays a screen where all specifications of the view are defined.

Following Sections

The following sections include documentation on:

- Temporary Views
including commands for setting lines, setting columns, and freezing headers and columns.
 - Permanent Views
including all of the specifications you make through the fields on the screen provided.
-

Temporary Views

Creating a Temporary View

A temporary view is created by executing a variety of commands to limit, alter, or rearrange what is displayed on your screen.

All commands for a temporary view are entered on the **COMMAND** line while browsing a specific report.

Note: A report can be printed with a view applied.

Temporary View Commands

Commands used to create a temporary view and the tasks they accomplish are described in the table below. Detailed documentation on each command follows the table.

Command	Description
HEADER	Freezes a selected number of lines on the top of each page.
RESET VIEW	Negates any changes made with view commands and returns the report to its original format.
SET COLUMN	Selects only specific columns of a report for display on your screen.
SET LINE	Selects only those lines you designate for display on your screen.
TITLE LINE 1	Enters a fixed title line on the first line of the display.
TITLE LINE 2	Enters a second fixed title line on the second line of the display. <u>Note:</u> You <i>must</i> have a TITLE LINE 1 to be able to have a TITLE LINE 2.
VISUAL BAR	Inserts a row of characters between a prescribed number of lines.

HEADER Command

The **HEADER** command freezes a selected number of header lines on the top of each page. These lines are referred to as “frozen” as they do not participate in up and down scrolling. Header lines are “unfrozen” or released by entering the **HEADER** command with no line parameters.

Format

HDR <number of lines>

HDR

Examples

The table describes format examples and results.

Command	Result
HDR 10	Freezes the first 10 lines on the top of each page of the report.
HDR	Header lines are released.

Temporary Views, Continued

RESET VIEW Command

The **RESET VIEW** command negates any changes made with view commands and returns the report to its original format.

Format

RV

SET COLUMN Command

The **SET COLUMN** command selects only specific columns of a report for display on your screen. You can specify as many column pairs as will fit on the **COMMAND** line. The **SET COLUMN** command entered without any column parameters resets all column selections.

Note: Use the **F2** key (Ruler) or the **RULER** command to assist you in identifying column numbers.

Parameters

The **SET COLUMN** command can include column pairs with a start col (starting column to be displayed) and an end col (ending column to be displayed). A “,” (comma) is used to allow a blank column to display. A “:” (colon) is used in freezing specific columns so that they do not participate in right-left scrolling. All column specifications preceding the “:” are frozen.

Format

SC <start col>

SC <start col>-<end col>

SC <start col>-<end col> <start col>-<end col>

SC <start col>-<end col>, <start col>-<end col>

SC <start col>-<end col>: <start col>

SC ?

SC

Examples

The table describes format examples and results.

Command	Result
SC 10	Selects column 10 as the starting column to display on each page of the report.
SC 10-10	Selects <i>only</i> column 10 to display.
SC 10-25	Displays only columns 10 to 25.
SC 10-25 50-70	Displays columns 10 to 25 and columns 50 to 70.
SC 10-25, 50-70	Displays columns 10 to 25, a blank column, then columns 50 to 70.
SC 10-40:41	Freezes columns 10 to 40 and allows columns 41 to the end of the line to scroll.
SC 20-22, 2-10	Displays columns in reverse order. Columns 20 to 22 are followed by a blank column, and then by columns 2 to 10.
SC ?	Displays the current set column status on the COMMAND line.
SC	Resets all column selections.

Temporary Views, Continued

SET LINE Command The **SET LINE** command selects only those lines of a report that you designate for display on your screen. The **SET LINE** command entered without any line parameters resets all line selections.

Parameters The **SET LINE** command can include line pairs with a start line (starting line to be displayed) and an end line (ending line to be displayed). More than one pair of lines can be set to display using a “,” (comma) to separate the pairs of line numbers.

Format

SL <start line>
SL <start line>-<end line>
SL <start line>-<end line>, <start line>-<end line>
SL ?
SL

Examples The table describes format examples and results.

Command	Result
SL 7	Selects line 7 as the starting line to display on each page of the report.
SL 7-7	Selects <i>only</i> line 7 to display.
SL 21-23	Displays <i>only</i> lines 21 to 23.
SL 8-10, 21-23	Displays lines 8 to 10 <i>and</i> 21 to 23.
SL ?	Displays the current set line status on the COMMAND line.
SL	Resets all line selections.

Temporary Views, Continued

TITLE LINE 1 Command

The **TITLE LINE 1** command allows you to enter your own fixed title line on the first line of the display. The maximum length of the title you can enter is 60 characters. Entering only **TITLE LINE 1** removes the previous first title line from the display.

Note: **TITLE LINE 1** is *not* modified by the use of the **COLUMN** command.

Format

TL1 <text>
TL1 <variables>
TL1 <text> <variables>
TL1 ?
TL1

Options

Besides text you choose for your title, the following variables can be inserted into the title line:

Variable	Description
&RPTNAME	Name of report.
&RPTVERS	Report version number.
&PAGE	Sequential page numbering starting at 1 for the first page.
&DATE	Report version date.
&TIME	Time report was generated.

Examples

The table describes format examples and results.

Command	Result
TL1 Community Centers	Displays the text "Community Centers" as a fixed title on the first line of the display.
TL1 &RPTNAME	Displays the name of the report as a fixed title on the first line of the display.
TL1 Community Centers &DATE	Displays the text "Community Centers" and the report version date as a fixed title on the first line of the display.
TL1 ?	Displays the current TL1 on the COMMAND line.
TL1	Removes the previously set TL1 from the display.

Temporary Views, Continued

TITLE LINE 2 Command The **TITLE LINE 2** command allows you to enter a second fixed title line to display under **TITLE LINE 1**. You must have a **TITLE LINE 1** to be able to have a **TITLE LINE 2**. Entering only **TITLE LINE 2** removes the previous second title line from the display

Note: **TITLE LINE 2** is *not* modified by the use of the **COLUMN** command.

Format

TL2 <text>
TL2 <variables>
TL2 <text> <variables>
TL2 ?
TL2

Options The same options described for **TITLE LINE 1** may be used for **TITLE LINE 2**.

Examples The table describes format examples and results.

Command	Result
TL2 Community Centers	Displays the text "Community Centers" as a fixed title under Title Line 1.
TL2 &DATE &TIME	Displays the report version date and time the report was generated as a fixed title under Title Line 1.
TL2 Community Centers &DATE	Displays the text "Community Centers" and the report version date as a fixed title under Title Line 1.
TL2 ?	Displays the current TL2 on the COMMAND line.
TL2	Removes the previously set TL2 from the display.

Temporary Views, Continued

VISUAL BAR Command The **VISUAL BAR** command inserts a row of characters between a prescribed number of lines throughout the report. Using this command breaks up the data and can make your report easier to read. The **VISUAL BAR** command entered alone removes the previous visual bar from the display.

Format **VB <number of lines>,<character>**
VB ?
VB

Examples The table describes format examples and results.

Command	Result
VB 8,*	Displays a row of ***** after each 8 lines of displayed report.
VB 10,#	Displays a row of ##### after each 10 lines of displayed report.
VB ?	Displays the current visual bar selection.
VB	Removes the previous visual bar from the display.

Saving a Temporary View as a Permanent View Once you have created a temporary view, you may want to save it as a permanent view. You can add the view so that all of the settings you have specified for the temporary view will be in place in the view definition as a permanent view.

When you are on the browse screen and have completed the temporary view settings:

- Key **AV** and a view name on the **COMMAND** line.

Example: **AV MHA**

Result: The **V18: Report** (View Definition) screen is displayed showing the permanent view definition including all of the settings you made for the temporary view.

- Press **F3** to save the view and exit the **V18: Report** (View Definition) screen.

The view is now a permanent view with the name you have designated. (See *Permanent Views* for more information on adding a view.)

User's Workbook Reference Lesson 7, Freezing Columns and Lines
 Lesson 8, Creating a Temporary View
 Lesson 9, Creating a Permanent View

Permanent Views

Introduction

A permanent view differs from a temporary view in that a file name is assigned and all of the view specifications are set up within a single command, the **ADD VIEW** command. Permanent views are report and user related, so that:

- no single view can be used with several reports.
 - each is a private report view. Access to a view is restricted to the User ID under which it is defined.
 - any permanent view can be defined as the default view so that when you browse the report, you will automatically see that view.
 - permanent view specifications can be applied to a print job.
-

ADD VIEW Command

A permanent view uses a single command (**ADD VIEW** or **AV**) which then displays a screen where all specifications of the view are defined. The **AV** command is entered on the **COMMAND** line while you are browsing a specific report or at the **V17: Report** (Available Report Views) screen. This command allows you to add a view definition to a particular report that can include the relocation of textual columns, header freezing, addition of report titles, and input of an initial command.

How to Add a View

To add a permanent view:

- Begin at the **Browse** screen of the report for which you want to add a view or at the **V17: Report** (Available Report Views) screen.
- Key **AV** and a file name on the **COMMAND** line.
(The file name can be from 1 to 8 characters alphanumeric.)
- Press **<Enter>**.

Result: The **V18: Report** (View Definition) screen is displayed.

Permanent Views, Continued

V18: Report Screen The fields provided on the **V18: Report** (View Definition) screen allow you to define a view and enter each view specification. A sample **V18: Report** screen is shown below.

```
J 1 V18: Report MH CLIENTS AVERAGE LOS
Command ==>
Use END command to save and exit. Use CAN command to cancel changes.

View Definition

View Name:   QTR
Description:

View Specifications:
Report Title 1:
Report Title 2:
Header Hold:
Columns:     61-250
Lines:
Context:     REPORT
Scroll:
Visual Bar:
Index Display:
Initial Cmd:
Apply to Print: (YES/NO)
Default View:  (YES/NO)
```

Screen Header The Screen Header indicates that you are on the **V18: Report** screen. The screen shows the report name and is specific to the report for which you are adding a view. In the above example, the **V18: Report** screen header shows the following report name: **MH Clients Average LOS**.

Permanent Views, Continued

Screen Field Table The table describes the fields as they are displayed on the **V18: Report (View Definition)** screen. All fields on this screen are optional.

Field	Description												
VIEW NAME	Displays the name you indicated on the COMMAND line and to which the view specifications are saved.												
DESCRIPTION	Key up to 40 characters to further define the view.												
VIEW SPECIFICATIONS REPORT TITLE 1	<p>Key a title line (up to 60 characters) to be displayed on the first line of the report when the report view is invoked. Variables that can be inserted into the title line are:</p> <table border="1"> <thead> <tr> <th>Variable</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>&RPTNAME</td> <td>Name of the report.</td> </tr> <tr> <td>&RPTVERS</td> <td>Report version number.</td> </tr> <tr> <td>&PAGE</td> <td>Page number.</td> </tr> <tr> <td>&DATE</td> <td>Report version date.</td> </tr> <tr> <td>&TIME</td> <td>Time report was generated.</td> </tr> </tbody> </table> <p><u>Example:</u> Key &RPTNAME Page: &PAGE Displays "(name of report) Page (page number)" on the first line of the report.</p>	Variable	Description	&RPTNAME	Name of the report.	&RPTVERS	Report version number.	&PAGE	Page number.	&DATE	Report version date.	&TIME	Time report was generated.
Variable	Description												
&RPTNAME	Name of the report.												
&RPTVERS	Report version number.												
&PAGE	Page number.												
&DATE	Report version date.												
&TIME	Time report was generated.												
REPORT TITLE 2	<p>Key a second title line (up to 60 characters) to be displayed on the second line of the report when the report view is invoked. A Report Title 1 is required to allow a Report Title 2. Variables described for Report Title 1 can also be entered for Report Title 2.</p> <p><u>Example:</u> Key Valid as of &DATE Displays "Valid as of (report version date)" on the second line of the report.</p>												
HEADER HOLD	<p>Key a series of from 1 to 10 line pairs that specify lines of the report to be frozen during the Browse session. This field functions the same as the HEADER command. See <i>Temporary Views</i> in this documentation for more information on using headers.</p> <p><u>Note:</u> If you use this field, you <i>must</i> indicate a starting line number in the LINES field that begins after the header you are freezing.</p> <p><u>Example:</u> Key 1-3,20-23 Freezes lines 1, 2, and 3 plus 20, 21, 22, and 23.</p>												
COLUMNS	<p>Key a series of column pairs that limits the display of the report text. This field functions the same as the SET COLUMN command. See <i>Temporary Views</i> in this documentation for more information on setting columns.</p> <p><u>Example:</u> Key 1-10,30-40 12-18 Displays columns 1 through 10 followed by a blank column followed by columns 30 through 40 followed by columns 12 through 18.</p>												

continued on next page

Permanent Views, Continued

Screen Field Table, continued

Field	Description
LINES	<p>Key a starting line number or series of line pairs that you want to exclusively display from the report. See <i>Temporary Views</i> in this documentation for more information on setting lines.</p> <p><u>Examples:</u> Key 6 Display starts with line 6. Key 15-35 Displays only lines 15 to 35.</p>
CONTEXT	<p>Report is the default for this field. Key the context function to be set when this report is browsed. Valid entries are Page, Line, and Report.</p> <p><u>Note:</u> If you use Line, the report is displayed as one long page and does not display blank lines or end of page indicators. Page and Report both acknowledge page barriers.</p>
SCROLL	<p>Key the amount of the report to be scrolled when the report is browsed. Valid entries are Page, CSR, and any valid scroll number. See <i>Scrolling Through a Report</i> in this documentation for more information on scrolling.</p>
VISUAL BAR	<p>Row of characters that can be inserted between a prescribed number of lines. The number of lines in the group is followed by the Visual Bar character. See <i>Temporary Views</i> in this documentation for more information on using Visual Bar.</p> <p><u>Example:</u> Key 8,* Displays a row of “*****” after each 8 lines of displayed report.</p>
INDEX DISPLAY	<p>This field is <i>not</i> used.</p>
INITIAL CMD	<p>Key any valid Browse command to be automatically executed when this view is invoked.</p> <p><u>Example:</u> Key Find ‘TOTAL’ The FIND TOTAL command is automatically executed when the report is first browsed with this view.</p>
APPLY TO PRINT	<p>Key Yes or No to indicate whether the report can be printed with the view criteria applied.</p>
DEFAULT VIEW	<p>Key Yes or No to indicate whether the view is to be the default view (to be applied automatically when the report is selected for viewing).</p>

Permanent Views, Continued

How to Modify and Save a View

To build the view, save the view definition, and exit this screen:

- Key the view specifications.
- Press **F3**.

Result: The message “*View Added*” is displayed in the upper right corner of the screen from which you began the view procedure, as shown in this example using the **B02: (report name)** screen.

```

J 1 B02: MH CLIENTS AVERAGE LOS 08/31/2001          View added
Command ==>                                         Scroll ==> 7

DATE PREPARED: 09-15-01          T D H H M R
TIME PREPARED: 07:04          DEMOGRAPHIC TRENDS FOR MH CLIENTS FOR QUARTER ENDIN
                                AVERAGE LENGTHS OF STAY
COMPONENT CODE: 656          COMPONENT NAME: NORTH TEXAS STATE HOSPITAL

                                CURRENT          LAST QT
                                QTR FY          QTR FY
                                4TH 01          3RD 01

AVERAGE LENGTH OF STAY FOR DISCHARGES          NUMBER          PERCENT          NUMBER          P
-----
30 DAYS OR LESS          236          33.33          193
31 - 90 DAYS          264          37.29          270
91 - 365 DAYS          180          25.42          183
1 - 5 YEARS          26          3.67          28
OVER 5 YEARS          2          0.28          0

TOTALS          708          99.99          674          1
AVERAGE LENGTH OF STAY          101.42          103.2
    
```

How to Cancel Add View

The **CANCEL** command is provided for use with the **V18: Report (View Definition)** screen. To exit this screen or to cancel changes you have made to the view definition:

- Key **CAN** on the **COMMAND** line.

Result: The message “*Update cancelled*” is displayed in the upper right corner of the screen from which you began the view procedure, as shown in this example using the **B02: (report name)** screen.

```

J 1 B02: NUM ACTIVE MR CLIENTS BY 12/12/2001          Update cancelled
Command ==>                                         Scroll ==> 7

DATE PREPARED: 11-14-98          T X H H H R
TIME PREPARED: 04:51          NUMBER OF ACTIVE MR PERSONS
                                SNAPSHOT AS OF 11-15-98

                                |-----COMMUNITY          SER
                                COMM RES          CLIENT/FAMIL
                                TOTAL          TOTAL

LSA*          MR AUTHORITY          CAMPUS RES          TOTAL          TOTAL          TOTAL
-----
00          LSA UNKNOWN          0          0          1

SUBTOTAL:          0          0          1

COMMUNITY MHMR CENTERS

01          ABILENE REG MHMR CENTER          150          66          262
03          AUSTIN TRAVIS CNTY MHMR CEN          205          60          753
04          CENTER FOR HEALTH CARE SERVS          353          77          1318
05          MHMR AUTH OF BRAZOS VALLEY          101          33          216
06          CENTRAL COUNTIES CEN MHMR          93          82          320
    
```

Permanent Views, Continued

SET VIEW Command

Once you have created a permanent view for a report, that view can be invoked by using the **SET VIEW (SV)** command while you are within the report. To invoke the view:

- Key **SV** and the view name on the **COMMAND** line.
- Press **<Enter>**.

Result: The report you are browsing is displayed according to the specifications previously defined for this view.

Example

If you are browsing a report that has a previously defined view of **ACCTLIST** and you want to invoke that view while browsing the report:

- Key **SV ACCTLIST** on the **COMMAND** line.
- Press **<Enter>**.

Result: The report is displayed with the **ACCTLIST** view invoked.

Permanent View Process Example

The following example of creating a permanent view describes the process.

You are at the **B02: Num Active MH Clients By** screen and want to create a permanent view named **MH** for the report you are browsing. You want to specify two report titles, a header, columns, and lines, and apply the view criteria to print. A sample **B02: Num Active MH Clients By** screen is shown as it is displayed when browsed.

```

J 1 B02: NUM ACTIVE MH CLIENTS BY 12/12/2001 Pg      1 of      2 Line  1
Command ==>                                         Scroll ==> 21
-----10-----20-----30-----40-----50-----60-----70-----8
DATE PREPARED: 11-14-98                               T X M H R
TIME PREPARED: 04:51                                NUMBER OF ACTIVE MH PERSONS
                                                    SNAPSHOT AS OF 11-15-98

```

LSA*	MH AUTHORITY	CAMPUS RES TOTAL	COMMUNITY RES TOTAL	SER CLIENT/FAMIL TOTAL
00	LSA UNKNOWN	0	0	1
SUBTOTAL:		0	0	1
COMMUNITY MHMR CENTERS				
01	ABILENE REG MHMR CENTER	17	1	922
02	TEXAS PANHANDLE MH AUTHORITY	27	21	1708
03	AUSTIN TRAVIS CNTY MHMR CEN	78	22	3069
04	CENTER FOR HEALTH CARE SERVS	293	30	4576
05	MHMR AUTH OF BRAZOS VALLEY	17	34	1157

continued on next page

Permanent Views, Continued

Permanent View
Process, continued

- Key **AV MH** on the COMMAND line of the **B02: Num Active MH Clients By** screen.
- Press **<Enter>**.
Result: The **V18: Report** (View Definition) screen is displayed.
- Press **<Tab>** to get to the necessary fields to add the following view specifications:
 - Key **Number of Active MH Persons** in the REPORT TITLE 1 field.
 - Key **Snapshot as of 10/15/94** in the REPORT TITLE 2 field.
 - Key **1-10** in the HEADER HOLD field.
 - Key **1-53** in the COLUMNS field.
 - Key **11** in the LINES field.
 - Key **Yes** in the APPLY TO PRINT field.

These view specifications are shown in the **V18: Report** (View Definition) screen example below.

```

J 1 V18: Report NUM ACTIVE MH CLIENTS BY LSA
Command ==>
Use END command to save and exit. Use CAN command to cancel changes.

View Definition

View Name:   MH
Description:

View Specifications:
Report Title 1: Number of Active MH Persons
Report Title 2: Snapshot as of 11/15/98
Header Hold:  1-10
Columns:      1-53
Lines:        11
Context:      REPORT
Scroll:
Visual Bar:
Index Display:
Initial Cmd:
Apply to Print: yes (YES/NO)
Default View:  (YES/NO)
  
```

When all the modifications have been made, press **F3** to save and exit. The **B02: Num Active MH Clients By** screen is displayed with the message “*View added*” as shown in the example below.

```

J 1 B02: NUM ACTIVE MH CLIENTS BY 12/12/2001
Command ==>
View added
Scroll ==> 20

DATE PREPARED: 11-14-98
TIME PREPARED: 04:51
T X H H R
NUMBER OF ACTIVE MH PERSONS
SNAPSHOT AS OF 11-15-98

LSA*  MH AUTHORITY          CAMPUS RES   |-----COMMUNITY   SER
      |                   TOTAL             |-----TOTAL       CLIENT/FAMIL
      |                   |                   |-----TOTAL       TOTAL
00   LSA UNKNOWN              0             |-----0             1
SUBTOTAL:                   0             |-----0             1

COMMUNITY MHMR CENTERS

01   ABILENE REG MHMR CENTER    17             |-----1             922
02   TEXAS PANHANDLE MH AUTHORITY 27             |-----21            1708
03   AUSTIN TRAVIS CNTY MHMR CEN  78             |-----22            3069
04   CENTER FOR HEALTH CARE SERUS 293            |-----30            4576
05   MHMR AUTH OF BRAZOS VALLEY  17             |-----34            1157
  
```

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Permanent Views, Continued

Permanent View
Process, continued

To display the report with the view invoked, key **SV** (Set View) *and* the view name **MH** on the COMMAND line. The report is then displayed according to the specifications for the **MH** view as shown in the example below.

```
J 1 B02: NUM ACTIVE MH CLIENTS BY 12/12/2001 Pg 1 of 2 Line 11
Command ==> Scroll ==> 7
Number of Active MH Persons
Snapshot as of 11/15/98
-----10-----20-----30-----40-----50-----

DATE PREPARED: 11-14-98 T
TIME PREPARED: 04:51 NUMBER
SNAP

LSA* MH AUTHORITY CAMPUS RES
----- TOTAL
00 LSA UNKNOWM 0

SUBTOTAL: 0

COMMUNITY MHHR CENTERS

01 ABILENE REG MHHR CENTER 17
02 TEXAS PANHANDLE MH AUTHORITY 27
03 AUSTIN TRAVIS CNTY MHHR CEN 78
```

User's Workbook
Reference

Lesson 9, Creating a Permanent View

Listing Report Views

Using the List Report Views Option/Command

You may want to know if any permanent views have been created for a report that you want to display or print.

X/PTR provides two means for determining if views have been specified:

- Select Option **V** (List Report Views) next to the report for which you want to list views on the **V22: Favorites** (reports) menu or the **V10: Report** (versions) menu.

or

- Key **LV** (List Views) on the **COMMAND** line within the report for which you want to list views.

Result: The **V17: Report** (Available Report Views) screen is displayed.

V17: Report Screen

A sample **V17: Report** (Available Report Views) screen is shown below.

```
J 1 U17: Report CLIENT CHARACT TRENDS AGE & PROB                               Line 1
Command ==>                                                                    Scroll ==> CSR
                                     Available Report Views

Options:      B      - Display Report Text with View
              S      - Display/Update View Definition
              DEL    - Delete Private Report View
              PRT/P? - Print Report with View Applied
Use END command to exit. Use AV command to add a new private view.

Opt View Name      Description                                Apply to Print
-----  --- PRIVATE VIEWS ---
MH
***** End of list *****
```

Screen Header

The Screen Header indicates that you are on the **V17: Report** screen. The screen shows the report name and is specific to the report you selected for listing views. In the above example, the **V17: Report** screen header shows the following report name: **Client Charact Trends Age & Prob**.

Listing Report Views, Continued

Option Identifier The Option Identifier section of the **V17: Report** (Available Report Views) screen lists the available options and function keys assigned for use with this screen.

The table describes the options available to enter in the OPT column.

Option	Description
B	Displays the B02: (report name) screen for this report with the specific view applied. See <i>Displaying a Report</i> in this documentation for detail on this option.
S	Displays the V18: Report screen and allows you to update the view definition. See <i>Permanent Views</i> in this documentation for detail on this option.
DEL	Deletes a Private Report View. <u>Note:</u> Private views are permanent views you defined on the V18: Report screen for your exclusive use. You <i>must</i> only delete one private report view at a time.
PRT or P?	Prints the report with the view applied. See <i>Printing Reports</i> in this documentation for detail on this option. <u>Note:</u> To be able to print the report with the view applied, you must have set the APPLY TO PRINT field as “yes” when you added the view.

The **F3** key assigned for use with this menu is used to exit the **V17: Report** (Available Report Views) screen. You will return to the menu where you selected the Option **V** or to the report browse screen you were viewing when you keyed the **LV** command.

The **AV** (Add View) command is provided for use with this screen. See *Permanent Views* in this documentation for detail on this command.

Listing Report Views, Continued

Screen Field Table The table describes the fields as they are displayed on the **V17: Report (Available Report Views)** screen.

Field	Description
VIEW NAME	Displays a 1-8 character view identifier.
DESCRIPTION	Displays free-form text used to describe the view.
APPLY TO PRINT	Indicates whether or not the view definition can be used during a print.

Scrolling Through
the Views List

The number of views that have been created for a report may exceed the space available on your screen. X/PTR provides commands and function keys (not listed on your screen) for scrolling up and down through the report views list.

The tables list the commands and function keys and describes the tasks they accomplish.

Command	Task Description
BOTTOM	Displays the last (or bottom) of the report views list. <i>Note:</i> The End of List indicator will <i>not</i> be displayed when this command is used.
FIND	Searches to display specific text. See <i>Using FIND</i> in this documentation for detail on this command.
TOP	Displays the beginning (or top) of the report views list.

Function Key	Task Description
F7	Scrolls up through the list of views.
F8	Scrolls down through the list of views.

How to Use the
V17: Report Screen

To use the **V17: Report (Available Report Views)** screen:

- Press <**Tab**> until you are in the OPT column next to the view/name for which you want to display the report text with the view applied, display or update the view definition, delete a private view, or print the report with the view applied.
- Key the option you have selected in the OPT column.
- Press <**Enter**>.

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Lesson 9, Creating a Permanent View

Using FIND

FIND Command	The FIND command allows you to search for a particular character string (any combination of letters, numbers, or keyboard symbols) while you are on a menu containing a listing or while you are browsing a report.
Search Parameters	The FIND command search parameters include the character string you want to find, the direction of the search, and the starting and ending columns of the search. The FIND command must have a character string and may have any combination of search direction and search columns. A space must separate each part of the FIND command.
Character String	<p>The character string for which you are searching is entered following FIND or F.</p> <p>If there are blanks in the character string, you must enclose the string in quotation marks or apostrophes. <u>Example:</u> "Dallas Texas"</p> <p>If a whole word or number search is required, the text must be <i>preceded and followed</i> by a blank.</p> <p>The string of text can be entered in either upper or lower case. Any occurrence of the text, whether upper, lower, or a combination, will be found.</p>
Search Direction	X/PTR provides "next" as the default direction for the search. The direction of the search is optional and can be entered after the character string as a part of the command entry. Valid entries are NEXT (beginning at the current line), PREV (previous to the currently displayed occurrence), and FIRST (the first occurrence of the string).
Starting and Ending Columns	The starting and ending columns can be entered to limit your search to specific columns. If you do not enter the starting column and/or the ending column as part of the command, the default of the first column to the last column (columns 1 - 132) takes effect.
Using FIND *	<p>A FIND does <i>not</i> automatically locate the second or subsequent occurrence of a string. You can look for the next occurrence of the same string by entering F * and pressing <Enter>. If the character string from the previous FIND command is located, the line containing that string is displayed on Line 1 of your screen and the message "<i>Found</i>" is displayed in the upper right corner of the screen. If not found, the message "<i>Not Found in Report</i>" is displayed.</p> <p><u>Note:</u> Pressing the F5 key accomplishes the same search.</p>

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