Article # 1083

Technical Note: How to Set Up and Print Reports by Batch

Difficulty Level: Beginner Level AccountMate User

Version(s) Affected: AccountMate 6 for SQL, AccountMate 6 for MSDE, VAM/SQL 5 and VAM/LAN 5

Module(s) Affected: All Modules

Posting Date: 7/16/2003

DESCRIPTION

The Print-Batch feature lets users set up groups of reports that they would normally print on a regular basis; and place the batch in a single, convenient location where users can generate them all at one time . Thus, a user might set up batches of reports to be printed daily, weekly, at period-end and at year-end. By setting up a batch of reports to be printed, you can directly print various reports from different modules by accessing only the **Print Batch** function in the **Utilities** menu.

The individual reports can be tailored for a specific batch through the use of report macros. Report macros are specific combinations of report-generation settings that are saved under a particular macro name. You can set up different macros of the same report and include them in one batch or assign them to different batches.

This technical note will discuss the detailed steps in setting up and printing a batch of reports.

SOLUTION

Perform the following steps to set up and print a batch for the various reports:

1. Access the **Print Batch** function in the **Utilities** menu. Here you can create the desired batch name for the different reports to be printed. Refer to **Figure 1**.
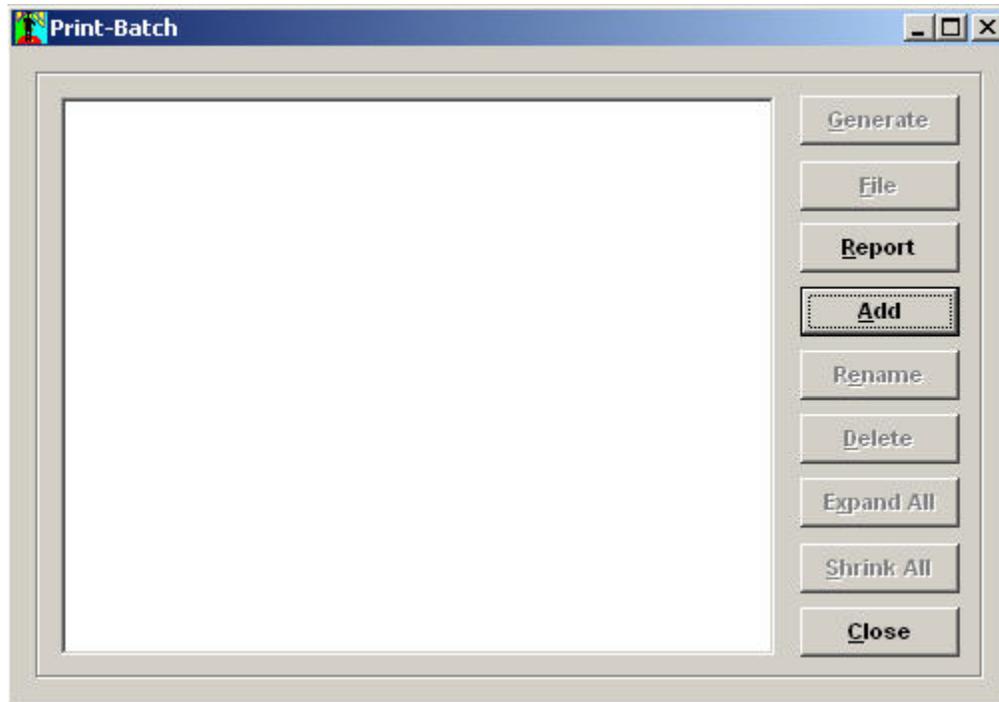
Figure 1. Print-Batch Window

2. Click the **Add** button (or, in the case of VAM/LAN 5, the **Insert** button) to display the **Add Print-Batch** window. Indicate the name of the batch in the **New Batch** field. Then click the **Add** button to save your entry. Refer to **Figure 2**.

Figure 2. Add Print-Batch Window

3. Set up the desired **Report Macro** for each report that will be included in the batch by performing the following steps:

   3.1. Specify the desired Type, sorting option (Sort By), Report Header settings, Criteria and any other options provided in the report interface.

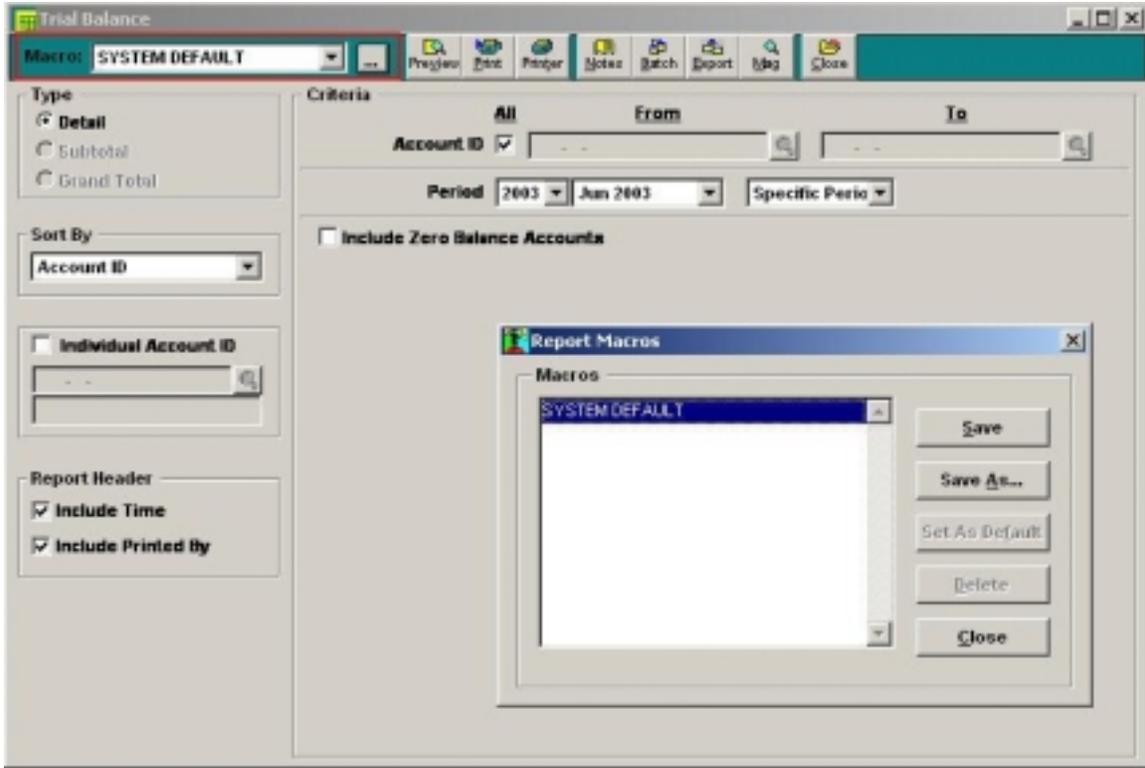   3.2. Click the **Ellipses** button to display the **Report Macros** window. Refer to **Figure 3**.

Figure 3. Report Interface & Report Macros Window

3.3.   Click the **Save As...** button then assign a name to the **Report Macro** you just created before you hit the **Save** button. Refer to **Figure 4**.
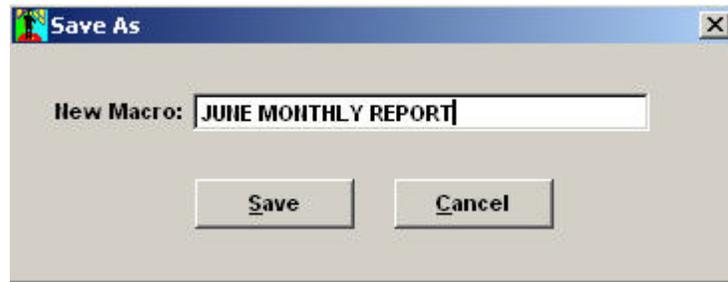

Figure 4. Save As Window

4. Assign report macros to your report batch. The process will differ slightly at this point depending upon whether you are using the SQL or the LAN version of the product.

4.1   *For those that are using VAM/SQL 5, AccountMate 6 for SQL and AccountMate 6 for MSDE*

Click the **Batch** button at the top of the report interface to display the **Print-Batch Setup** window. On the left grid, highlight the particular batch that you want to assign a macro for the report you are currently accessing. In the right grid, mark the **Attach** checkbox of the report macros that you

want to include in the batch that is currently highlighted in the left grid. The system will automatically mark the checkbox of the highlighted report batch name. Then click the **OK** button. Repeat the process for all reports that you want to assign to a specific batch. Refer to **Figure 5**.
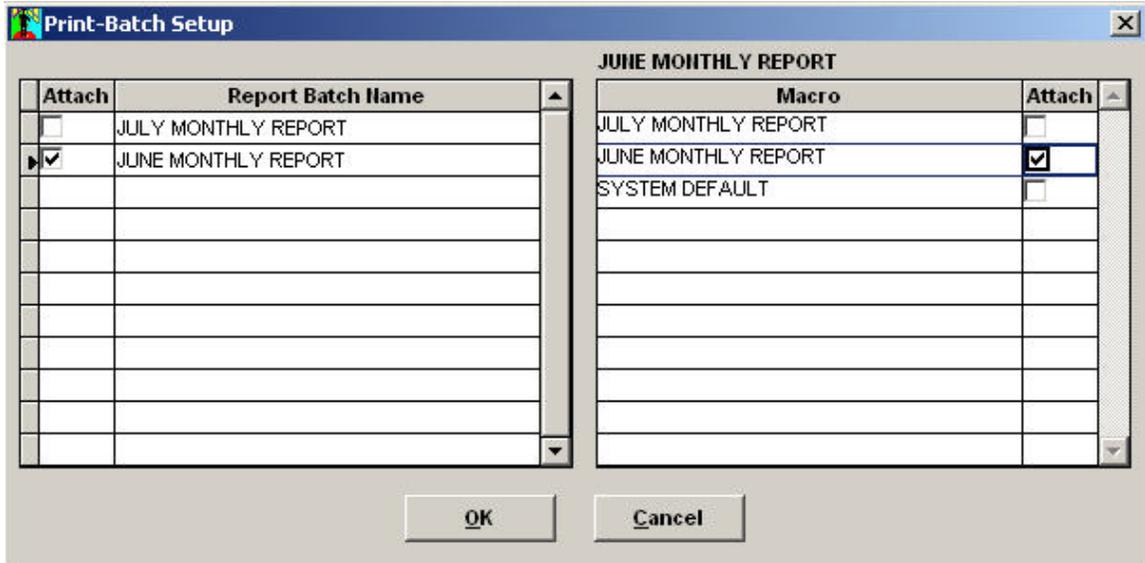
Figure 5. Print-Batch Setup Window – VAM/SQL 5 and AccountMate 6

4.2 *For those that are using VAM/LAN 5*

Click the **Batch** button at the top of the report interface to display the **Print-Batch Setup** window. On the left grid, mark the box beside the particular batch that you want to assign a macro for the report you are currently accessing. In the right grid, type the name of the report macro that you want to include in the batch that is currently highlighted in the left grid. You can also select the desired macro from the list provided through the lookup button. Then click **OK**. Repeat the process for all reports that you want to assign to a specific batch. Refer to **Figure 6**.
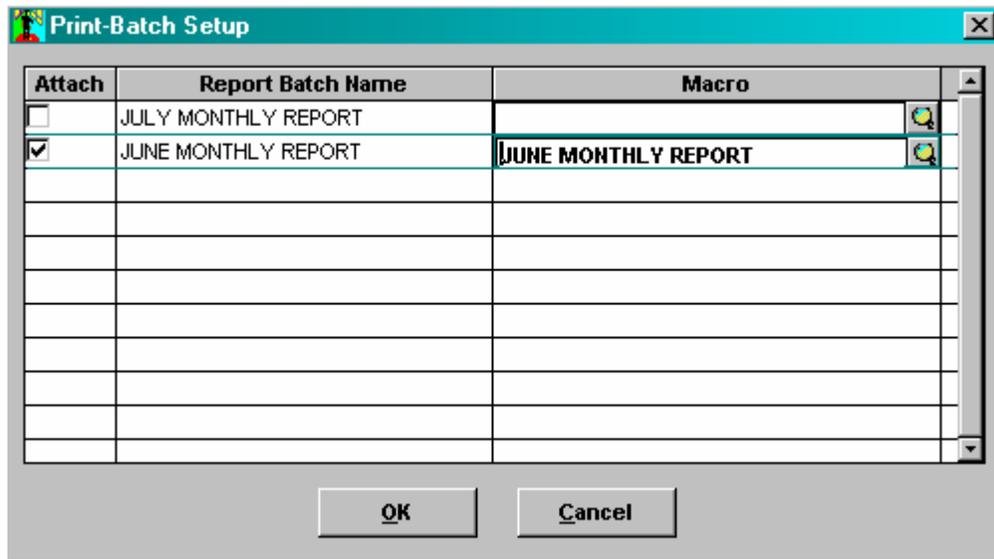
Figure 6. Print-Batch Setup Window – VAM/LAN 5

5. To generate reports for a batch, access the **Print-Batch** function from the **Utilities** menu. Highlight the batch you want to print then click the **Generate** button (or, in the case of VAM/LAN 5, the **Print** button). This will display the **Print Batch [xxxx]** window that will list the various reports and corresponding macros included in the batch. Refer to **Figure 7**.
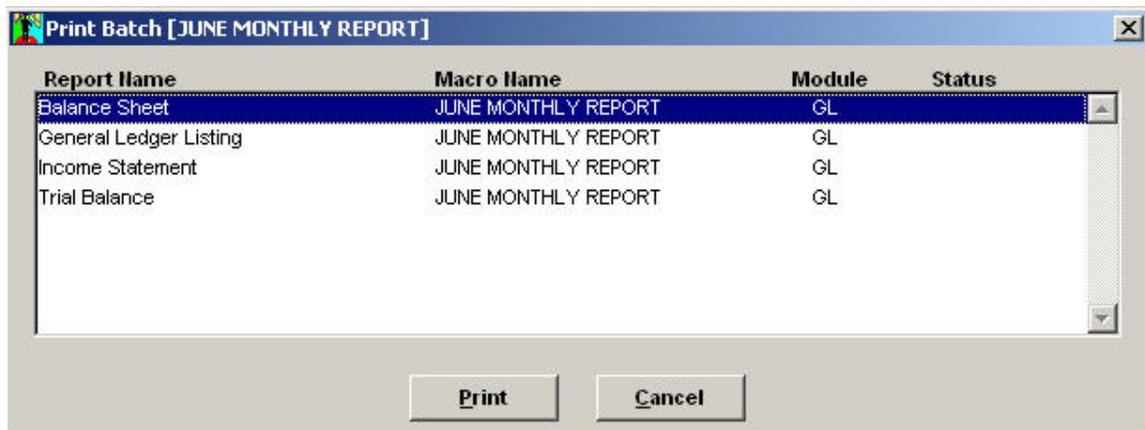

Figure 7. Print-Batch [xxxx] Window

6. Click the **Print** button to display the **Printer** window. After selecting the appropriate printer, click the **Ok** button and the system will print the reports. You can gauge the progress of your print job by checking on the information shown under the **Status** column of the **Print Batch [xxxx]** window.

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