

*RUNNING*

*REPORTS*

*IN*

*MP2*

*MAINTENANCE MANAGEMENT SYSTEM*

PREPARED BY:  
HRS, TRAINING AND ORGANIZATIONAL DEVELOPMENT AND  
APPLICATION SUPPORT FOR ADMINISTRATION

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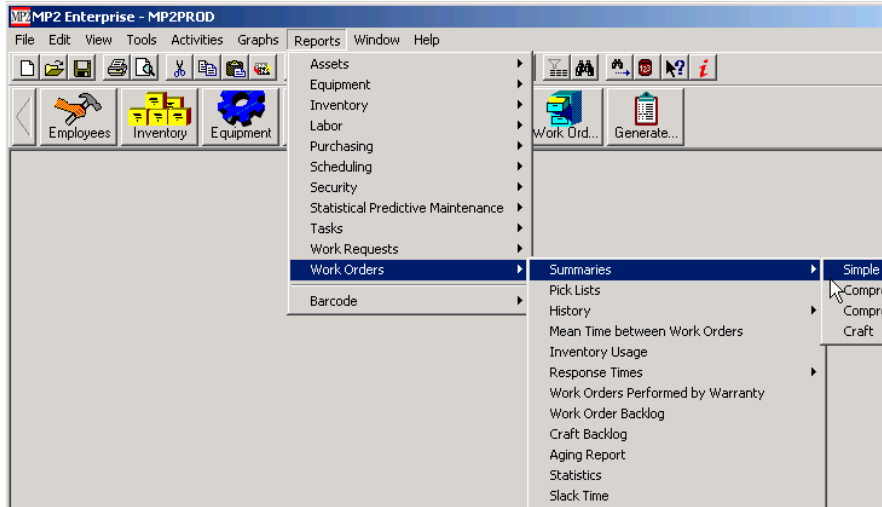
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# GENERAL PROCEDURES FOR REPORTS

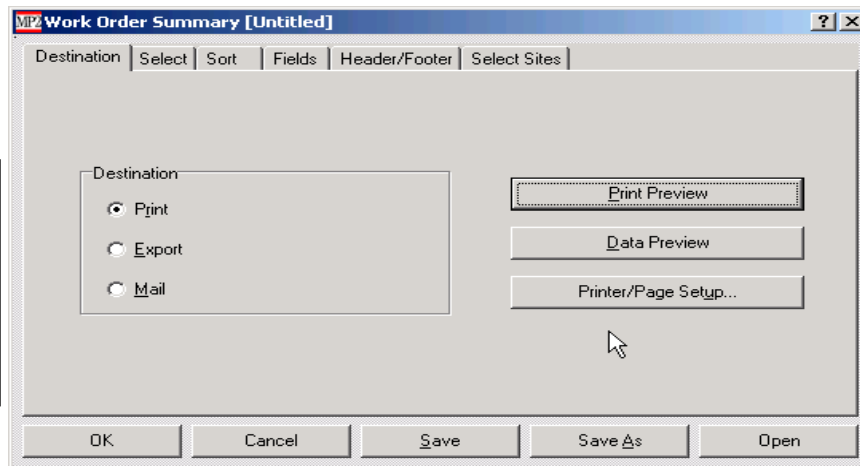
Below are general procedures for creating, modifying, previewing and printing.

## SELECT REPORTS

Select a report by choosing REPORTS from the menu bar, and then choose the report.



MP2 displays a Reports dialog box similar to this one.

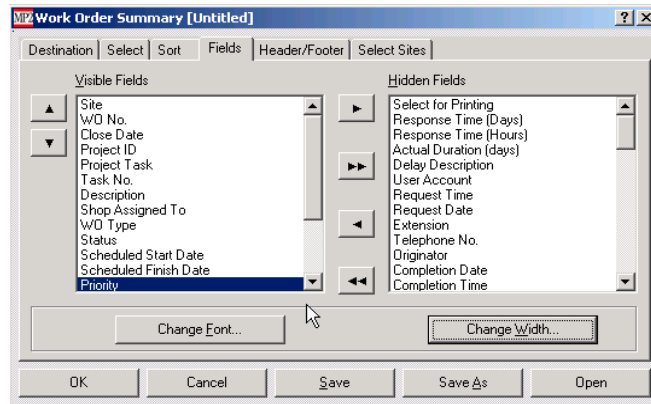


**NOTE:** To exit this screen you must press **Cancel** or the X in the upper right corner. Pressing **OK** will print the report or ask to save it as a spreadsheet, but not exit you from the screen.

## SELECT REPORT FIELDS






Select which fields to include in reports, and select the order in which to include them. Follow these steps when selecting report fields.

1. Choose Reports from the menu bar, and then choose the report to print. MP2 displays a print dialog box.
2. Click the Fields tab. MP2 displays the Fields page.



**Visible Fields** lists all fields included on the report and **Hidden Fields** lists all fields excluded.

3. Select the fields for the report. Refer to this table when selecting fields.

FUNCTION	PROCEDURE
Change fonts	Click <b>Change Font</b> . MP2 displays the Font dialog box. Select font characteristics and then click <b>OK</b> .
Reorder fields	Select the field from Visible Fields and then click either  or  to move the field up or down in the order.
Change widths	Select the field from <b>Visible Fields</b> , and then click <b>Change Width</b> . MP2 displays the Change Width dialog box. Place the cursor over the dividing line of the field. The cursor changes to  . Drag  right or left to adjust the width of the field.
Remove fields	Select the field from <b>Visible Fields</b> , and then click  . MP2 moves the field to <b>Hidden Fields</b> .

## SELECT RECORDS

### 1<sup>st</sup>: SELECT THE SITES \*

Depending on the contents of the report, select the sites for which to create a report. Reports that do not contain site-specific information do not contain the additional page.

## **SELECT RECORDS – SELECT THE SITES (continued)**

Follow these steps when selecting the sites.

1. Choose the report to print. MP2 displays a print dialog box.
2. Click the Select Sites tab. MP2 displays the Select Sites page.
3. Select the site(s) for which to print the report.

Define a filter to select particular records to include on reports. For example, select only inventory records from a specific location to include on the Inventory Standard report.

Selecting records does not change fields; it only changes records that MP2 prints on reports. Refer to “Select Report Fields” later in this lesson for information on selecting the fields to include on reports.

Follow these steps when selecting records.

1. Choose the report to print. MP2 displays a print dialog box.
2. Click the Select tab. MP2 displays the Select page.

The screenshot shows the 'MP2 Work Order Summary [Untitled]' dialog box with the 'Select Sites' tab selected. The 'Condition' section contains a list of filter rules. The first rule is '1. Request Date is greater than or equal to '5/20/2003''. The second rule is '2. Or'. Below the list are buttons for 'Add ()', 'Remove ()', and 'Remove All ()'. At the bottom of the dialog are buttons for 'OK', 'Cancel', 'Save', 'Save As', and 'Open'. A mouse cursor is pointing at the 'Field Name' dropdown menu.

\* NOTE: If you have access to more than one site, this tab will show. If you have access to only one site, this tab will not show.

3. **Field Name** – Select the field by which to filter the report.
4. **Operator** – Select the filter operator
5. **Value** – Enter the value by which to filter the report.

6. Enter additional selection criteria, as necessary. Refer to the following table for additional filter functions.

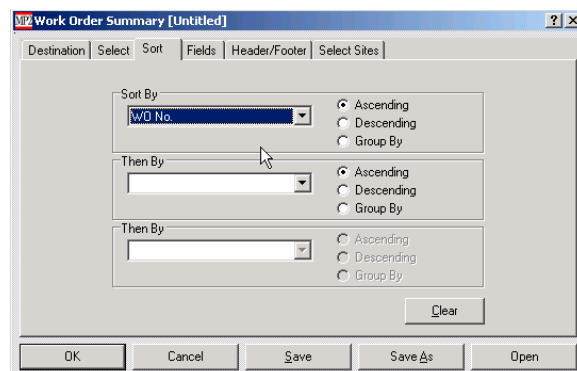
FUNCTION	PROCEDURE
Add conditions	Click <b>Insert</b> . MP2 inserts a blank condition before the current condition.
Modify conditions	Select, in the box at the bottom of the dialog box, the condition to modify, and then edit the <b>Condition</b> as necessary.
Delete conditions	Click <b>Delete</b> . MP2 deletes the current condition.
Display previous condition	Click <b>Previous</b>
Display next condition	Click <b>Next</b> . If the current condition is the last condition in the filter and you click <b>Next</b> , MP2 adds a new condition after the last condition
Change the joiner (And/Or)	Select the condition from the list box, and then select the joiner <b>And</b> – Select to include records that contain both of the joined conditions <b>Or</b> – Select to include records that contain one or the other condition.
Group conditions	Hold down SHIFT, and then select each condition to include in the group. Release SHIFT, and then click <b>Add ( )</b> .
Remove groupings	Select the first condition in the group, press SHIFT, and then select the last condition in the group. Click <b>Remove ( )</b> . MP2 removes the grouping from the conditions. Click <b>Remove All ( )</b> to remove groupings from all conditions.

### ***SORT RECORDS***

By default, MP2 sorts information for reports by the first field of the report. You can change this sort order, if necessary.

Follow these steps when sorting records.

1. Choose Reports from the menu bar, and then select the report to print. MP2 displays a print dialog box.
2. Click the Sort tab. MP2 displays the Sort page.
3. **Sort By** – Select the primary filed by which to sort the report.



4. Select one of these options.

<b>Ascending</b> – Select to sort the records either alphabetically or numerically by the selected field, i.e., <i>A</i> preceding <i>B</i> or <i>1</i> preceding <i>2</i> .
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<b>Descending</b> – Select to sort the records in either reverse alphabetical or numerical order by the selected field, i.e., <i>Z</i> preceding <i>Y</i> or <i>2</i> preceding <i>1</i> .
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<b>Group By</b> – Select to group the records by the selected fields.
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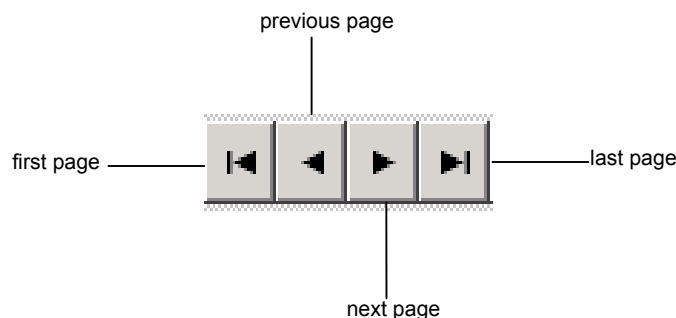
5. **Then By** – Select secondary and tertiary fields by which to sort the report, if necessary

### ***PREVIEW REPORT***

You can preview the data for a report without viewing the actual report. Use Data Preview to browse for a field value, or to view data before selecting records to include in the report.

Follow these steps when previewing reports.

1. Choose the report for which to preview data. MP2 displays a print dialog box.
2. Click Data Preview. MP2 displays the Data Preview form. Refer to this diagram when navigating through Data Preview.



View reports on the screen before printing them. Print preview applies the sort and filter, headings and print characteristics to the report; therefore, you can view the report exactly as it will appear in print.

### ***PRINT PREVIEW***

Follow these steps when previewing reports.

1. Choose the report to preview. MP2 displays a print dialog box.
2. Click **Print Preview**. MP2 displays the Print Preview form.
3. Click **Close**. MP2 returns to the print dialog box.

## **SPECIFY PAGE LAYOUT AND PRINT INFORMATION**

MP2 defaults to a standard layout and print setup. Change the layout and print setup as necessary.

Follow these steps when specifying page layout and print information.

1. Click Destination Tab in the Reports dialog box
2. Click Printer/Page Setup. MP2 displays a Page Setup dialog box.

Refer to this table when specifying page layout and print options.

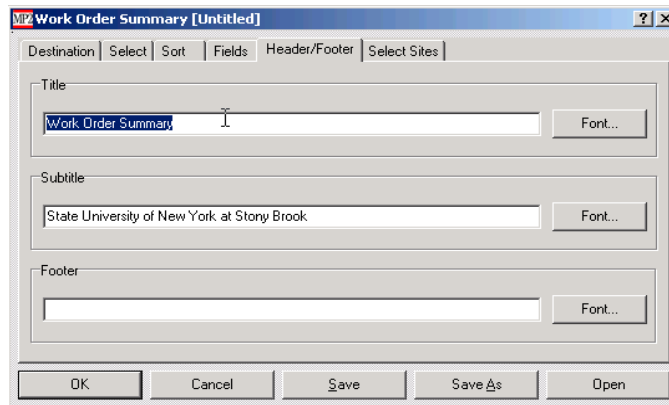
OPTION	PROCEDURE
<b>Margins</b>	Specify the margin widths in inches or centimeters, and then enter the left, right, top and bottom margins
<b>Page Range</b>	Select which page to print:  <b>ALL</b> – Select to print all pages  <b>CURRENT PAGE</b> – Select to print the current page. Select this option only when printing the report from Print Preview  <b>PAGES</b> – Select to specify the first and last pages of a range to print
<b>Copies</b>	Center the number of copies to print
<b>Orientation</b>	Select <b>Portrait</b> or <b>Landscape</b> as the print orientation.  NOTE: Even if you specify a printer orientation in the Print Setup dialog box, MP2 still prints the report according to the orientation specified in this dialog box.
<b>Style</b>	For tabular reports, choose one of these options.  <b>Tabular (With Grid)</b> – Select to print the report in tabular format with a grid  <b>Tabular (Without Grid)</b> – Select to print the report in tabular format without a grid.  <b>Record</b> – Select to print the report in non-tabular format.

## ***CUSTOMIZE REPORT HEADERS AND FOOTERS***

Customize the headers and footers on MP2 reports. By default, MP2 prints the report name and facility name in the header and might print a note about the report in the footer.

Follow these steps when customizing report headers and footers.

1. Choose Reports from the menu bar, and then choose the report to print. MP2 displays a print dialog box.
2. Click the Header/Footer tab. MP2 displays the Header/Footer page.



**TIP:** To change the font of the header title, header subtitle, or footer, click **Font**.

3. **Title** – Enter the title of the report. MP2 prints the title in the header of each page.
4. **Subtitle** – Enter the subtitle of the report. MP2 prints the subtitle below the title in the header
5. **Footer** – Enter the footer for the report. MP2 prints the footer at the bottom of each page.

## ***OPEN EXISTING REPORTS***

Customize and save reports and then open them as needed. Follow these steps when opening existing reports.

1. Choose **File / Open** from the menu bar. MP2 displays the Open dialog box showing the current MP2 working directory.
2. **File Name** – Enter the name of the file to open.
3. Click **Open**. MP2 opens the specified file.

## ***PRINT REPORTS***

Print reports to the specified printer. Follow these steps when printing reports.

1. Choose the report to print. MP2 displays a print dialog box.
2. Select **Print** as the destination, and then click **OK**. MP2 prints the report.

## ***CHANGE THE PRINTER***

MP2 applies the default printer information you set up in Windows. Change printer options, if necessary.

Follow these steps when changing the printer.

1. Choose the report to print. MP2 displays a print dialog box.
2. Click **Printer/Page Setup**. MP2 displays the Page Setup dialog box.
3. Click **Printer Setup**. MP2 displays the Print Setup dialog box.
4. **Name** – Select the printer with which to print the report.