Creating and Modifying
GoldMine for Windows 3.2/4.0
Reports
Revision 2

GoldMine Software

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Introduction

The process of creating and modifying reports first requires the understanding of a few principles.

As an analogy, lets examine the process of building a high rise office building. Before the construction crew even sets foot on the lot, they must have a complete set of blue prints for the structure. Not only that, a plan is laid out for constructing the different components which will compose the building.

Similarly, when creating a new report, a "blue print" is also required. GoldMine for Windows 95 utilizes report layouts to perform the task of a blue print. In order to properly construct the different elements of the report, it is also highly advised that a plan be set forth which outlines the instructions for building those components.

Assuming the plans are complete, the construction crew needs a few more things before commencing work.

Before I can begin to hammer any two boards together, I need to have a hammer, some nails and some boards. In this example, the hammer is a tool to be used in the building process, while the nails and boards are some of the building materials. The crew that will construct the office building, would need to get a hold of these materials.

It is highly doubtful that you will be able to purchase lumber or other building materials at your local grocery store. Therefore, it is absolutely necessary to know where these materials can be acquired and have them readily available before any construction can take place.

GoldMine for Windows 95 provides you with the "hammer" in its built-in report generator. All the tools necessary to build a report are contained within it. What about the boards or nails though? The "building materials" for our report are contained within the different database files containing the data that has been entered onto the GoldMine system.

Due to the extensive amount of data which a typical GoldMine system is capable of holding, it is highly advised that you become very familiar with the internal structures for the various database files containing this information. The advanced features manual for GoldMine for Windows 95 details this information, including the unique record types used within the different databases.
Although the documentation which is provided is extremely helpful, there are certain circumstances in which it is necessary to view the actual files to see exactly how and where the data is stored.

Assume that somehow I spill all of the nails on my way to the job site and they end up falling in the middle of an extensive amount of brush. I now have the task of locating

these nails. Although I know the general area in which the nails are located, it would take me a tremendous amount of time to try and locate these nails among all the brush. The task would be greatly simplified if I had some type of tool to assist my search. In this example, a metal detector would be of great assistance in locating the nails.

How does this example aid in the location of data within GoldMine files though? For GoldMine, the equivalent of the metal detector would be a database file browser.

Fortunately, there is a freeware database file browsing and editing utility available for download from our web site, CompuServe forum or BBS, which will perform the task. The name of the utility is BR and it is the recommended method for viewing GoldMine data using an external source. Please refrain from using other applications such as Excel or Access to view the data for it may cause irreversible damage to your data. It is highly recommended that you become familiar with BR.

Using BR or BR4, we can easily view the raw data within the database files and determine which records are stored within the different database files. Furthermore, it allows you to distinguish the different fields that contain the various pieces of data that compose a complete record. Prior knowledge of which data is contained within the different fields of a record is very helpful in the report generating process.

Going back to our construction crew and office structure. Would it make sense for the crew to develop a new method of erecting an office building each time they construct a new one? The obvious answer is no. It would take much less time if the crew were to mold their construction plans on methods that have been used and proven in previous projects. In other words, why reinvent the wheel?

Similarly, the report writing process should adhere to this same principle. GoldMine for Windows 95 provides quite a few different reports with different report layout formats. The ability to copy the structure of an existing report layout would be a great aid in the process. The cloning feature of GoldMine allows one to precisely do that.

Cloning / Copying Principles

Cloning a report is the process of making a copy of the current report layout. As an example, lets assume that I want to print out a report that generates only contacts with an Internet Address profile. The data that I want to print out is stored as a profile record. Profile records are in turn stored within the contsupp.dbf file.

Careful examination of the reports available in the "Contact Reports" category reveals that there is an existing report that generates profile tab data, "Contacts with Profile Tab." I can simply clone this report, make the necessary modifications, and generate the report.

As you can easily see, it is much easier and faster to clone an existing report and modify it, instead of writing the report from scratch. It is always a good idea to keep in mind what you want the final project to look like, then examine the existing reports to see if

there is already one written, which may closely resemble your ideas. A report that resembles what you want can be easily modified to suit your needs.

The only time one would really want to start a report from scratch, is if none of the existing reports resemble what one is looking for as a final result. Notice an additional piece of information pertaining to this example.
Immediately after determining the data needed to generate the report, the relationship between that data and the database file that stores it was established. Had it been necessary to generate the report from scratch, we would already know which database file to use.

Reports Menu

While examining the different reports, notice that the reports are sorted in different categories within the reports menu. New reports must be defined within the appropriate category; otherwise the report will not process the data properly and will in turn generate erroneous results.

To simplify matters, let's familiarize ourselves with the general features of the reports menu.
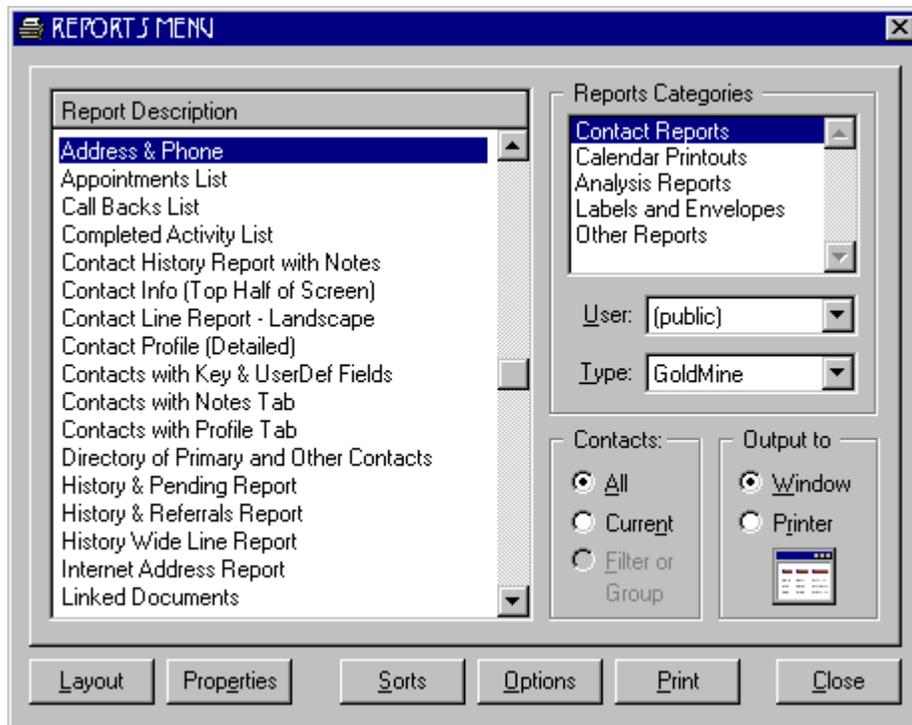
Report Categories

The reports are contained within five different categories; Contact Reports, Calendar Printouts, Analysis Reports, Labels and Envelopes, and Other Reports. Although it is very important, often times when working with reports, the category aspect is often overlooked.

Selecting a different report category will allow access to additional reports.
In addition, changing the value of the USER field allows access to other user's reports, assuming security restrictions do not prevent from doing so. By default, all the available reports will appear under the user name value of "public."

The report categories options will be discussed in further detail later in the documentation.

Ranges and Outputs

Below the categories sections are the "Contacts" and "Output" sections. The contacts sections is used to set a range as far as how much of the database will be printed. The three options available are all, current and filter or group.

If selected, the first selection would cause the report writer to print a report reflecting data for every contact in the currently open database. Please note that the report writer will only generate data for the currently open contact file, regardless of how many different contact files may have been created.

The second option, current, instructs the report writer to generate the selected report for the currently active contact record in GoldMine. Some reports were not written to take advantage of the current contact selection, but rather, were intended for printing all contacts or a filter/group of contacts. How some reports print for the "All" or for the "All" and "Current" selections, will be covered later in this document.

Lastly, the filter or group option will allow you print a subset of the database. Notice that in the prior picture, the option was grayed out or unavailable. This option will only become active when you access the reports menu after activating a subset of the database. Activating a group, filter, organization tree or tagging records will make the option available.

The output section does not require a detailed explanation. It is simply used to specify the output method for the report. The two options available are window (screen) and printer.

In some cases, it is of greater importance to have the ability to print to a file. However, the output method options do not display "file" as one of the possibilities. Working in conjunction with the "Window" setting, GoldMine provides the ability to save reports to a file. A report can be saved to a file by first printing it to the window and once generated, accessing the local menu on the report output screen and choosing the save option. Reports that are saved to a file can only be viewed via a GoldMine for Windows 95 system. To view a saved report, go to File | Print Reports, then access the local menu and choose "View Saved", you will then be prompted for the file name.

Description Entries

The left-hand side of the reports menu window, titled "Report Description," lists all the available reports for the selected category and user name. The description string for any report is limited to sixty characters and does not have any type of impact upon the configuration of the report layout.

Each report and its settings, such as category or user name, is stored as a record in the file report32.dbf which can be found in the root GoldMine directory. The associated

report32.dbt file is used to store any corresponding notes for the report, viewed by accessing the report's properties.
Reports Local Menu:

Reports Local Menu

Accessing the local menu within the reports description section will allow you to create new report entries, clone existing reports, delete existing reports and view saved report files, among other options.
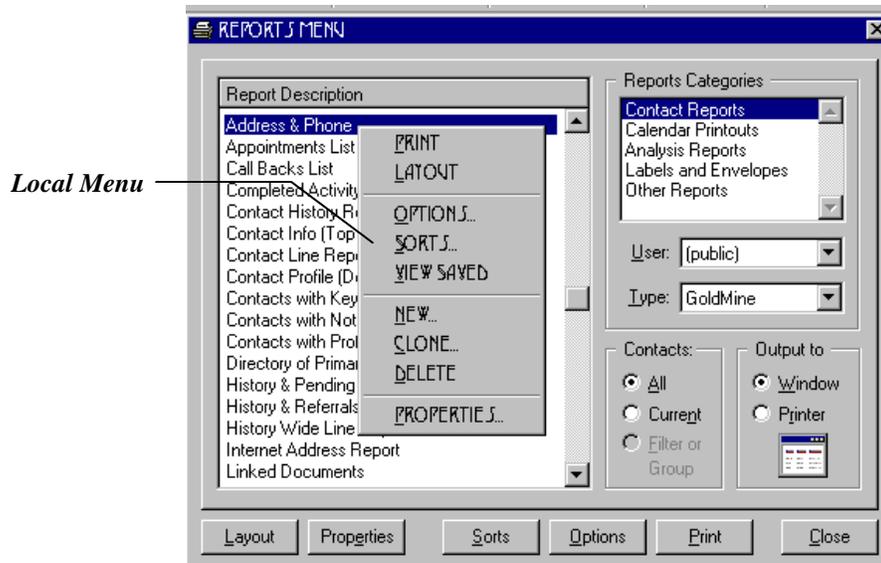
Notice that the clone, new, delete, and view saved options can only be selected via the local menu. We will now examine these options in further detail.

New Reports and Report Properties

Selecting "New" from the local menu will bring one to a reports profile window, which is displayed on the following page. The properties for already existing reports can be accessed by selecting the "Properties" option on the main reports menu window or local menu.

Report Title   **User Name**

Notes Field

Filename

Printer Selection

REPORT PROFILE

Report description:
Address & Phone

Owner:
(public)

Notes:
Full Address; Company; Name; Phones.
8 contacts per page (2 Across/
 4 Down). Landscape.
Sort by: Contact 1 & 2 Fields. In other

Default Printer
○ Selected Printer
○ Layout Printer

Report Filename:
leaddrph.fp

OK   Cancel
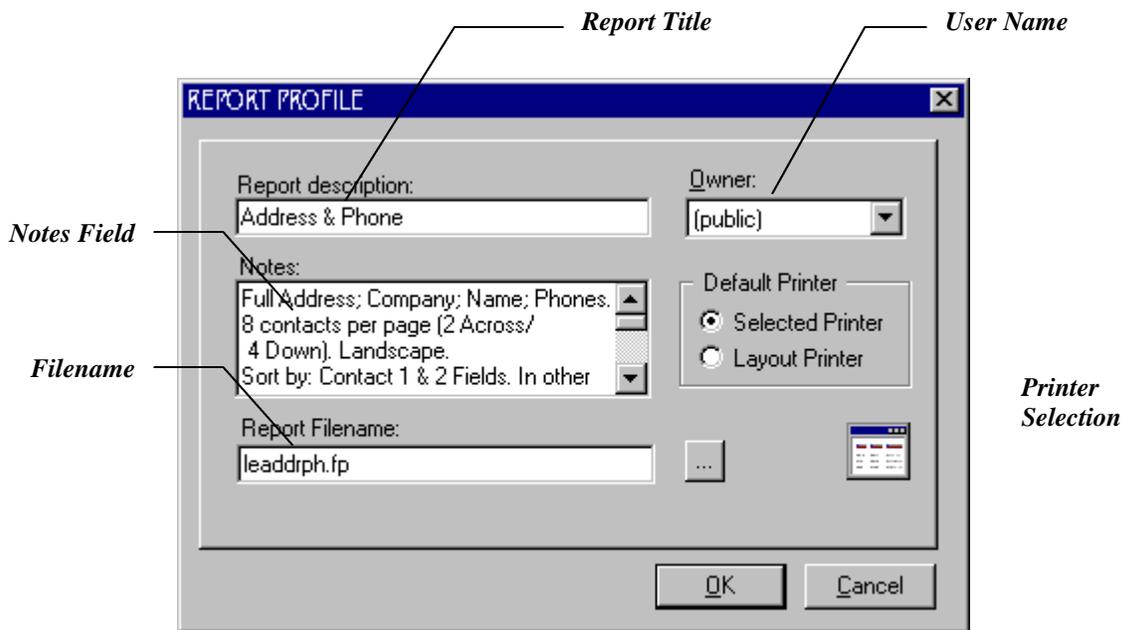
The report description field is used to specify a brief title for the report. This is the string seen listed on the left-hand side of the main reports menu window.

Below the report description field, is a notes field. Any special annotations pertaining to the report should be typed within this box. By default, recommended sorts for the report are one of the items detailed. The note field has a limit of 64k (65,536 characters), however, at this time the Windows edit box is limited to 32k. This means the actual amount of notes is limited to 32k, instead of 64k allowed by the dBase specification.

The report filename field is used to specify a file name for the report. Report files will use an extension of FP. By default, GoldMine will store the files in the Reports sub-directory found one level below the main GoldMine directory.

GoldMine does not require that users provide an extension or path for the report file. For example, if I want to name my report file "myreport.fp" and store it in the default location, I would simply enter the value "myreport". A path would only be specified if I wish to store the file in a location other than the default reports sub-directory. The browse button is simply used to explore drives and directories for existing files.

The check box for duplicating the current report layout is only applicable when creating new reports profiles. If checked, it instructs GoldMine to duplicate the layout of the currently selected report. Much in the same manner as cloning would. However, please be aware that this feature does not currently work. This issue may have been resolved by the time of this printing. GoldMine will instead use a default layout when a new report is created. Please use the clone option to make copies of existing report layouts.

Report Security

The upper right hand section of the report profile window displays the owner field. The owner is a user to whom the report file is assigned. Ownership of the report can be set to an individual user or the user group "public." For example, suppose the value is set to "JOHN", the reports screen would only display reports belonging to the user "JOHN".

Should they wish to do so, GoldMine administrators have the ability to restrict a user from accessing reports that have been assigned to other users. Thus effectively preventing access to management level or confidential reports, etc.

Printer Setup

Printers are designated in the default printer section. There are only two options for this section, selected printer and layout printer. Choosing the "Selected" printer would cause the report to print on the specified default printer. The default printer for GoldMine use is set by selecting File | Printer Setup.

The layout printer option will generate the report on the printer specified within the report's layout. We will look at how to specify a report layout printer when we discuss general layout features.

Cloning:

Returning to the local menu of the reports menu. The next option we will examine is the clone feature. Cloning a report will also bring you to a blank report profile window. The difference between the clone and new options is that the clone option will create a copy of the current report layout, regardless of whether or not the option to duplicate the report layout is checked on the profile window. Make sure that a report file name is specified, or leave it blank for a random file name.

Once cloned, the report layout can be easily modified to include your customizations, without changing the original report.

Viewing Reports Saved As A File

The "View Saved" option on the local menu allows you to view reports previously saved to a file. When selected, it will bring you to the following screen, permitting you to select the saved file.
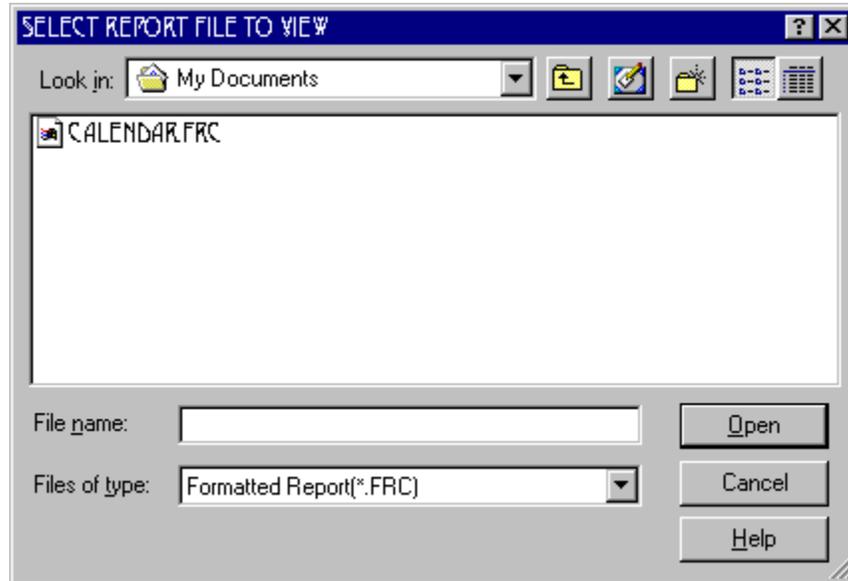
After selecting the appropriate file and clicking open, GoldMine will display the saved filed as though it had been printed to the window. If so desired, the report can then be sent to the printer.

Deleting Reports

Lastly, the "delete" option of the local menu is used to delete report description entries. A complete delete procedure involves two distinct steps since there are two components to a report entry.

GoldMine first deletes the record in the report32.dbf. Secondly, it will prompt the user if they wish to delete the actual report file itself, as pictured in the figure below. As you can see, it is possible to delete the report32.dbf record entry without deleting the report file.
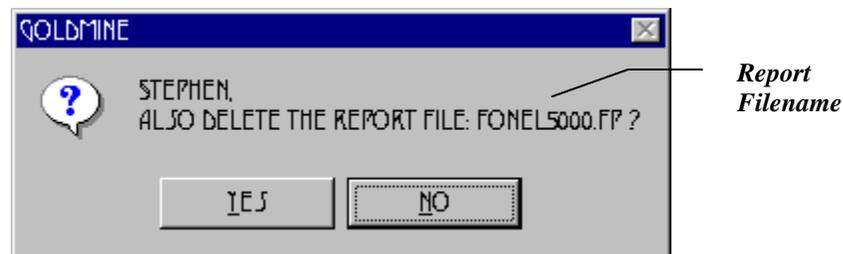
Report Filename

By deleting the report entry but not the report file itself, the report can be moved to a different category. This is particularly useful, if the report starts out in one category but would be better suited to another after a few changes have been made to the original.

Miscellaneous Options

The last section of the reports menu which has not been discussed yet are the six different buttons found at the bottom of the window. The "Print" and "Close" buttons are self-explanatory and do not require further elaboration.

Layout

The "Layout" button is used to access the currently selected report's layout. The purpose of the layout is to define the report's configuration. Any desired modifications, ranging from adding data fields to removing sections, would all be made on the layout.

Properties

We have already discussed the "Properties" feature. Clicking on this button displays the report profile window for the currently selected report file.

Sorts

One of the most widely used features within any report writer is the sorting function. The "sorts" button allows you to specify up to three different sort levels. A view of the sorts options window is displayed below.
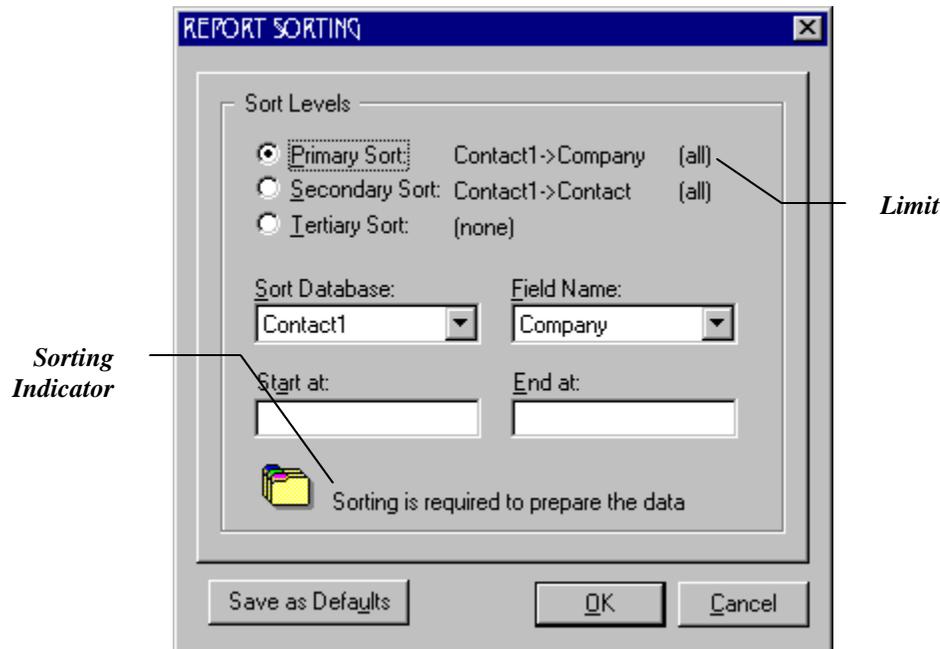
Sort Levels

The primary sort is the first sort level which will be applied to the report. The secondary sort would follow next. Lastly, the tertiary sort would be applied. The databases that can be selected are the same databases available when inserting a data field onto the report

layout. Therefore, they may vary depending on which is the currently selected report category.

Suppose that we are to print a directory of our entire database. In addition, the records need to appear in alphabetical order, based on the company name.

Setting the primary sort to contact1->company would effectively accomplish the task. But, say that we have two records for the company name "The Widget and Gadget Company", one for John Smith and another for Jane Doe. Which record should be printed first?

Logical sense would tell one to print these records alphabetically, based on the contact's name. In order to instruct GoldMine to do this, a secondary sort of contact1->contact would need to be applied.

Lets take this example one step further and assume that there are multiple contact records that share the same name. Perhaps one record is for the West Coast office and the other for the East Coast office. It would be helpful to sort these records based on their territory.

The tertiary sort would accomplish this task for us. Suppose the West Coast value is stored in the key1 field, we can define a tertiary sort set to contact1->key1.

The sorting indicator at the bottom of the window is usually grayed out. When it becomes active, it indicates that GoldMine's report engine needs to sort the data before the report is generated. This action will slow down the output speed. Sorting is mainly required for reports using multiple sort levels and/or reports sorted by non-indexed fields.

Note: A frequently asked question is how to print a report based upon the sorting of a filter or group. This is accomplished by setting all three sort levels to none. Notice that the primary sort can only be set to "none" when a filter or group is active.

Sort Ranges

To the right of each of the different sort levels is a limit indicator specifying whether or not a constraint has been defined for the adjacent sort option. The two possible values are "All" and "Range." The "Range" value denotes that a constraint has been placed on that particular field. Notice that it does not indicate the values of those constraints. The constraints may be viewed by clicking on the corresponding sort, the "Start At" and "End At" fields will indicate the range specified.

Constraints

Constraints can be defined for any field being used for sorting. They are defined by means of the "Start At" and "End At" fields. Constraints are helpful in that they can be used to filter the data that will be printed on the report. Each constraint is completely

independent of the other and thus, does not affect any additional sort levels that may or may not be in use.

Suppose I wanted to generate a report listing for only those companies that begin with the letter C. Assuming that my primary sort is set to the company field, I can specify C and Cz as start at and end at values respectively to effectively accomplish this task. The "End At" value would be "Cz" and not simply "C", because we want all company names that start with "C" even if they are longer than 1 character. If an end at value of "C" were specified we would only get company names that were simply called "C" and not companies such as: "Conner and Sons", "Century Furniture", or "Carter's Powerboats".

The "Start At" and "End At" constraint value fields are both limited to twenty characters.

The picture below illustrates how a constraint would be configured. Notice the limit value has changed to range.
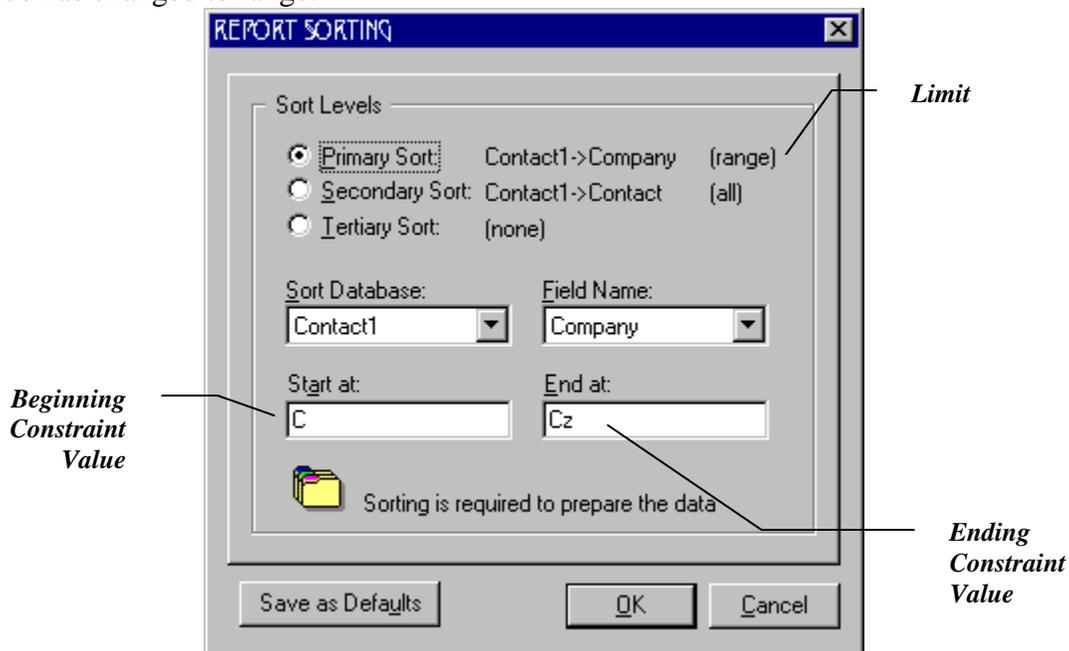
In addition, if printing a report which sorts on either the conthist->user or cal->user field, placing the &user macro as the starting and ending constraint value will result in a report which generates data for the currently logged in user only, regardless of who they are.

The "Save as Defaults" button will cause GoldMine to save the current sorting options for future use. If not selected, the current sorting will be applied to the report until the reporting engine is exited, or a different report is selected from the reports menu.

Report Options

The "Options" button on the main reports menu window allows users to configure certain parameters for the report being generated. Date ranges, user names, permitted data and the like are all configured from the options window. However, the available options will

vary, depending on which is the currently selected report category. Special notes about the differences in options will be made when the different report categories are discussed.

Report Categories

Contact Reports

The first category, "Contact Reports," is used for reports that generate basic information pertaining to the contacts in your database. A directory listing type of report is an excellent example of a report that should be included in this category. Other good examples would be reports that generate general contact information including data from the tabs such as contacts, profiles, pending, etc.

Calendar data can also be generated within this category. An example of such a report would be one that generates general contact information and the pending activities associated with that contact, such as the default "Future Activity Report."

Another example of calendar data reports would be the "Appointments List" which generates a list of scheduled appointments plus some of the associated contact information.

The options button in this category, is used to limit data in a few different ways. The most important limit is the type of activities the report will be allowed to display, as well as the date range, etc.

History and Calendar Data

Users can limit the particular activities that will be printed by deselecting the particular activity type under the History Data or Calendar Data sections of the window. In addition, a specific user name under either of these two sections can be specified to limit the activities that are printed to those of the specified user. Note that GoldMine only permits the options of "all" or a specific user name in this field. A user group cannot be specified.

Data can be further limited by specifying date ranges using the "Date" and "To" fields for each section. Furthermore, activity codes can be specified in the "Actv" field for the calendar, while history data can be limited by the "Actv" and "Result" fields. These fields represent the codes given to the activities when they were scheduled or completed.

Supplemental Data

Other data that can be limited is the supplementary data, such as additional contacts, profiles, and other data contained within the contsupp.dbf file. Much like the activity types in the history and calendar data sections, if an option is deselected; the report will not generate that type of data regardless of how the report layout is configured.

For example, if I have a report that generates main and additional contact information, deselecting "Other Contacts" in the linked data section would not allow the report to print the additional contact information.

Lastly on the options window, the "Save Settings" button saves the currently selected options as the default settings for the report whenever generated. If you do not choose to save the settings, you may simply click the "OK" button. The settings will remain in use until the report menu is exited or a different report has been selected.

Special Notes

One thing to note about generating scheduled activity reports within the Contact category is that they can be configured to print for the "All" contacts option or the "Current" and "All" contacts option, regardless of which type of activity is being printed. It is usually best to configure the reports to print for the "all" selection, since users normally would want to know all of their upcoming activities associated with not only the current contact, but also all other contacts in the database plus any unlinked activities.

Configuring the report for the "current" option generates the report much faster, but it would not generate unlinked activities.

An important fact to understand, is that using a report configured for only the "All" contacts selection to print the activities of the "Current" contact record, will result in an incorrect report. This usually manifests itself in the printing of activities for the wrong contact or multiple instances of the same activity.

To configure a pending or history report to print for both the "Current" and "All" contacts selection, there should be a "Sort1 Header" with a "Break Field" on the Contact1 database. The "Sort2 Header" should "Break" on the Cal database or the ContHist database. This allows the report to directly link the Contact information with the appropriate calendar or history records for that particular contact, when the "Current" contact selection is used. Break fields and sort headers will be discussed later in this document.

Calendar Printouts

Reports that resemble graphical calendars can be found in the "Calendar Printouts" category. One of the better examples of such a report is the Day Timer format. Daily, weekly, and monthly Day Timer reports can be easily created with GoldMine. The calendar printouts category is unique in that it makes use of certain macros that are not available within any of the other report categories. We will look at macros and their functionality later in this documentation.

Options

There is a very special relationship between the data generated on the report and the items selected in the "Options" button of the reports menu. The "Detail Text" section of the "Options" dialog box allows you to specify which data that is associated with the scheduled activity will be generated on the report. For example, information such as the

activity type, reference, and phone number corresponding to the scheduled activity can all be generated.

Do not attempt to include any other data on the report outside of what can be selected within the detail text section. For example, a common request is to add the company name or key field data pertaining to the scheduled activity's contact. Doing so would result in a report with a lot of extraneous and erroneous information. There are a couple of reasons for this.

Below is a picture of the layout for the "Activities Monthly" report. When printed, this report resembles an actual calendar, listing all the scheduled activities on a day by day basis.
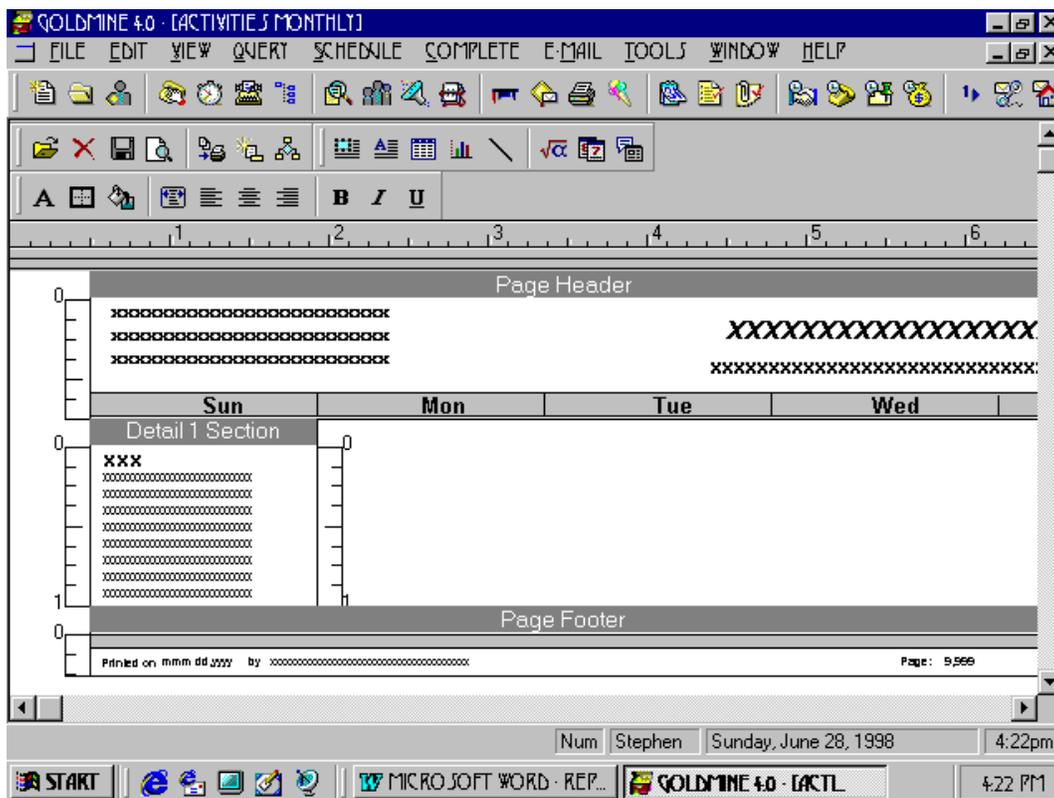
There are two very important things to note about the layout that would cause erroneous information to be printed should additional fields be inserted.

The first of these two is the fact that the report does not have a defined sort header. How does this affect the printing of additional fields though?

Report layouts that do not have a sort header also do not have a defined break field since they can only be defined within sort headers. Without a break field, we do not have a way for GoldMine to determine when to update the data contained within the contact1.dbf or other inserted fields. For this reason, the most likely result of inserting extraneous fields would be a report that outputs the same value multiple times.

Secondly, notice that the detail1 section only contains macros. Of importance is the &Detail1 macro, because it generates all of the scheduled activity information. The &detail macro is a single field which generates much of the calendar data, regardless of how many activities need to be printed.

Due to this fact, GoldMine will not have a method of associating other fields with the appropriate scheduled activity. In addition, the data from the inserted field will only be printed once per detail section. Therefore, if five scheduled activities are printed for April 17, 1997, and the key5 field is inserted, only one value for key5 will be generated, regardless of whether or not the activities are for different contacts.

Options (Include Activities section)

The options button for this report category allows you to restrict the types of activities that will appear on the report. The calendar data generated with these reports will always pertain to a single user name. Notice that only a single user name can be specified in the options window, unlike the "Contact Reports" category in which "All" can also be selected. This is because most of the Calendar reports are meant for printing in a single page format, multiple users' data would clutter the printout and become unreadable, due to the large amount of data generated by more than one person's activities.

Data can also be limited by specifying date and time ranges. Though, the date range is set for you automatically because one of the monthly, weekly, or daily buttons have been selected. Some of the reports may not print correctly if the date range is changed from the default. For example, on a monthly report, suppose the date range is changed to print all twelve months. The resulting report will print all of the information, however some days from one month may appear on another month's calendar. This is because one month may have had enough room to print some days from the next month's calendar, so it went ahead and printed them on the current page. This causes the next months calendar page to have less days then it should. This effect will gradually cause the months that are printed toward the end of the report, to be shifted even more to the previous page as space is generated by the shorter months.

For the reasons stated above, it is usually best to leave the date range set to the default, unless the type of report you have designed works well with an increased date range. This would typically be accomplished by designing a fixed report, where there are no fields in the report which are set to "Variable Number of Lines" and the entire page layout has been used. Meaning, that if a report is meant to print on 8.5'' by 11'' paper, that the layout of the report uses the entire 11'' length of the paper. This will cause the report to print exactly to the end of the page, no more and no less. If the layout does not actually need to use the entire length of the page, then setting the detail section to "Advance Page Before Printing this Section" will achieve the same results. In this fashion, the report will always print the same length no matter how many pages are generated.

Page Layout

The page layout section of the options window determines the manner in which the detail section will output the data for the &day macro. Selecting the "Monthly" option will generate the information for all the days in the month. However, it is possible that the actual output will not display the date within the correctly corresponding day. For example, it could display March 11, 1997 as being a Monday, when in fact it was a Saturday. This all depends upon how the report was written, since the person designing the report is responsible for determining if what they are telling the report writer to do is actually a valid action for the report writer. In other words, the report writer will try to perform the instructions which you have given, without any type of error checking.

If our goal is to print a calendar with a monthly listing of activities, not a week by week listing. The obvious selection would be "Monthly." The other three options, "Weekly", "Daily (Fixed)" and "Daily (Variable)" have more practical applications when generating reports similar to the DayTimer variety and again, would cause problems for a report of this type.

Daily (Fixed) instructs the report writer to print out a set range of time blocks. The time range is a 12 hour window beginning at 7:00 AM and ending at 7:00 PM, which are broken down into 1 hour blocks. Neither the time frame nor the time blocks can be modified in any manner. Each block will be printed on the report, regardless of whether or not there are any scheduled activities for that time period, hence the term fixed.

The Daily (Variable) option can be used to print reports similar to the previous example. However, instead of printing every block of time, even if blank, it will only print those time blocks which have activities associated with them.

Often times, when the incorrect page layout option is selected, one of the results that will be observed is a particular activity will be generated multiple times.

Sorts

An additional bit of information that is of importance within this category is the fact that sorts are not available. Sorting is not necessary for reports of this type, since a calendar report will always be displayed in date and time order. Also, note that the only contact range option available is "All," unless a filter or group has been activated.

Analysis Reports

Analysis reports are used to generate summary reports, similar to the output from the graphical analysis, forecast analysis, etc. The reports found here are extremely helpful for management. They summarize a variety of items, including completed or scheduled activities, for an individual user, or all users.

There are no special items to note about this category. The selections found within the "Sorts" and "Options" windows function in the same manner as they do within the "Contact Reports" category.

Labels & Envelopes

The fourth category, "Labels and Envelopes," is used for label and envelope reports, as the title implies. GoldMine provides many predefined report layouts for differing sizes of Avery labels and also for some of the more common envelope sizes.

Sorts

The sorts button allows the report to be sorted on virtually any database, however for nearly all circumstances, a label or envelope report should only be sorted on the Contact1 or Contact2 database. For example, since label or envelope reports are typically only printing names and addresses, there would be no reason to sort on history. To do so, would generate erroneous results.

Options

The items in the options window, normally do not have any bearing on the output of the report. However, if you are using a label report for additional contacts and the "Other Contacts" box is deselected within the Linked Data section, the report will be blank. By default, GoldMine 3.2 does not provide additional contact labels, but the archive "NEWLABEL.EXE" contains a few new report layouts that will add this functionality to GoldMine 3.2. GoldMine 4.0 includes the additional contact label reports by default.

Note: If you have upgraded to GoldMine 4.0 from a previous version of GoldMine, and do not see these additional contact label reports or any reports at all, please refer to FactsBack document 504. This document explains how to update your reports and report descriptions, to the newer GoldMine 4.0 reports.

Other Reports

The last category, "Other Reports," is used for reports that generate data from database files other than the contact files directory or calendar file. Layouts created within this category will only allow the insertion of data fields from the Report Macros, Users, Lookup, Filters, Reports, Rolodex, Merge Forms, Scripts, Opportunity Manager, and the Mailbox files. These databases are only available within this category, with the exception of the Opportunity Manager, which is available in all of the categories.

Since the "Other Reports" category prints mostly databases that have little to do with the contacts themselves, it is normally used for administration purposes. Such as printing a list of GoldMine user information, lookup values, and merge form listings. However, it is also useful for non-administrative reports, such as printing your personal Rolodex or listing the filters you have defined in GoldMine.

Options

The "Options" button is disabled for this report category, since it is primarily used for calendar and history data.

Miscellaneous Notes

Would it be possible to create a report that includes lookup.dbf and contact1.dbf data? No, fields from the lookup.dbf file can only be inserted on a report layout that is defined within the "Other Reports" category. It is not possible to insert fields from the contact1 database onto the same report layout, since the contact1 database is not available within this category.

Keep in mind the differences between the categories when designing a report. It would be pointless to attempt the design of a contact directory listing report in the "Other Reports" category, since the necessary databases are not available.

Once the appropriate category has been determined, examine the existing reports to identify whether or not a new report layout needs to be created from scratch or if an existing layout can be modified.

Assuming that it is necessary to create a new report layout. It is important to understand a few principles of report writing before commencing. One of the elements of greater importance is the break field, which is defined in a Sort Header.

Layout Configuration Principles

A properly configured report layout may be composed of several different elements. Among these elements are Sort Headers and break fields.

Break Fields

One of the most important principles to understand about reporting is break fields. A break field is a method of grouping data within a report. In addition, break fields are also used to specify the database which will be linked to a particular section of a report. Break fields will cause the report to generate all of the data for the inserted fields within a section, until the break field value changes.

For example, assume the break field of a report is set to cal->accountno. The calendar database has a one-to-many relationship with the contact1.dbf file. This means that there are multiple records contained within the cal.dbf sharing the same accountno field with only one record in the contact1 database. This is how the many records in the calendar database are linked to just one contact record in the contact1 database. The defined break field will instruct the report engine to group all of the activities for each unique accountno value. Therefore, if there are three records with an accountno value of 970401…and five with the value of 970502…, the three activities with the same accountno will be grouped together and then the other five will be grouped together.

If this same example were applied to a break field of cal->userid (GoldMine 4.0, GoldMine 3.2 would be cal->user) then the calendar activities would be grouped by the GoldMine user name. In this manner, each user's activities would be grouped together. It is important not to confuse a break field with sorting. In other words, the break field merely groups the data together, but does nothing to **sort** the data.

Should you wish to sort the individual records based on the date or other value, a sort level can be defined within the Sorts button on the main reports screen. It is important to note that there is a vague relationship between the sorts set in the Sorts button and the break field. This relationship may not always be clear at first but with some experimenting, it will become more clear. For example, if a break field is set to cal->userid and the Sorts button is set to a primary sort of conthist->userid, the report generated would print erroneous information. This is due to the fact that the break field was set to the calendar database, however the sort was on the history database, clearly this is impossible and results in confusing information.

Break fields can only be defined within a Sort Header. The GoldMine report engine limits the number of Sort Headers that can be defined to nine and only one break field can be defined within each Sort Header. Thus, the maximum number of break fields that can be defined for any report is also nine. To insert a new Sort Header on a report, select Insert | Section | Sort *n* Header from the report layout menu, where *n* is a number between one through nine. The differences in the various sections will be discussed later.

To further clarify, suppose a report is to generate a listing of all of my contacts within my database. Assume that we have also inserted all the necessary address fields, phone numbers and key fields.

It would make logical sense to instruct the report writer to update the address and additional inserted fields, whenever the contact name changes. There are various different break fields that can be set. The first one that comes to mind is the contact field itself. Why not refresh the data every time the contact name changes? This would work great in a database that does not contain any duplicate names. Chances are that any database that is being used, will at some point, have contact records that share the same name. Should this occur, it is likely that the report will only generate the data for one of those contacts that shares the name in question. This of course is a problem, since the other contact that shared the same name would be ignored.

There is a method to determine if the two contacts that share the same name would both be printed, or simply the first contact name that was encountered would be printed. Since the break field is defined in a Sort Header, if the contact name is printing in that Sort Header, the contact will only print once. This is due to the fact that only one unique contact name has been found, it does not matter that there are actually two or more, just that it is unique. However, if the contact name were printing in a Detail Section which is linked to this particular Sort Header, then both contact names would be printed for the single Sort Header. Detail Sections print data which is many-to-one with respect to Sort Headers. Detail Sections will be discussed in more detail later.

The second possibility is the company field. Using the company field as the break field would cause similar problems to arise. The company field is especially prone to having multiple contact records with the same value, since there may be multiple entries in the database for different primary contacts at the same company.

As you can see, it would be best to use a field that contains a value which is always certain to be unique for each individual record in the database. Fortunately, GoldMine has a unique field for each contact record in the database. The accountno field is a unique identifier within the contact1 database.

It is recommended that reports of this nature use the accountno field as the primary break field. Setting the break field to the accountno field of the contact1 database, would cause the report to refresh the inserted fields every time the value in the accountno field changes. This value only changes as the contact1 record changes, or in simpler terms, every time GoldMine moves from one contact record to another within the contact1 database.

In addition to data fields, calculation or expression fields can also be used as break fields. A good example of such an implementation also involves the use of the accountno field. For example, using a break field defined as "left(contact1->accountno,6)", would instruct the report writer to update the fields in the Sort Header based solely on the creation date of the contact1.dbf records. Since the first 6 characters of the accountno field is the

creation date of the record, the Sort Header will update each time the creation date of the contact record changes. In this example, it would be possible to have multiple records with the same value. This Break Field would be used if a report was needed to print all the contacts created on certain dates, together in one group.

Report Layout Local Menu

The report layout, like many other areas within GoldMine, contains a local menu that can be accessed by clicking the secondary mouse button.

The first option, "Save" will only be available if a modification has been made to the layout. Next on the list is the "Edit" option which expands into a sub-menu with several options.

Edit

The standard cut, copy, paste, and delete options are available in the edit sub-menu. In addition, the font selection allows you to change the field's font, size, text color and a few other options.

Suppose the text within the field needs to be right justified, centered or left justified. The position text option allows the definition of these settings. It also allows for the positioning of text vertically within the field's outline.

The edit sub-menu also allows access to the outline functions of the report writer. GoldMine's report writer has the ability to draw the fields outline on the final output. Selecting the "outline" option from the edit local menu allows you to configure several options specific to the printing of outlines, as displayed below.
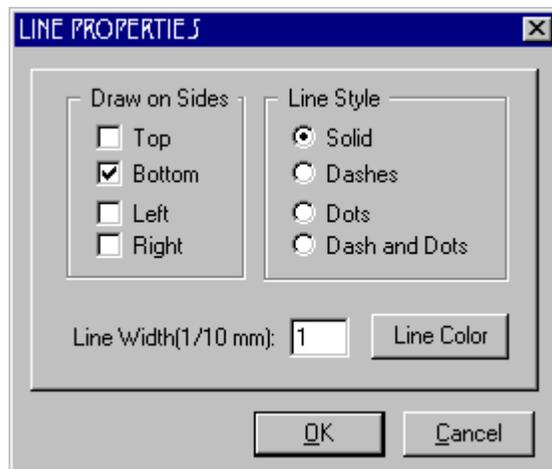
Each individual side of the outline can be drawn independent of the other sides. If any side is selected, the "Line Style" section becomes active, allowing the definition of the line style itself, varying from "Solid" to "Dash and Dots."

In addition, the width and color of the line can also be configured.

The background option on the edit local menu, allows each field to be modified to include shading, a particular color, etc. This is useful for creating bars or dividers within the report page to separate the different sections of the report once it has been generated.

The ability to insert expression fields onto the report is a very powerful feature of the report writer. If the actual expression within the field needs to be edited, the field expression option can be used to edit the text of the expression. In depth information pertaining to expression fields will be provided later in the documentation.

The filter option of the edit sub-menu is only active when the secondary mouse button has been used on the section itself. This allows the editing of the filter for the currently selected report layout section. This is the same expression field edit box accessed by selecting the "Filter" button from a section's properties window, as displayed on the following page.
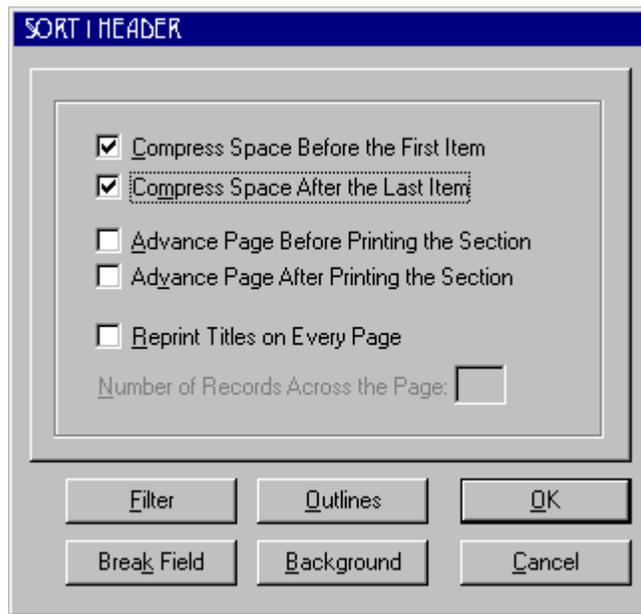
The "Show Field Names" option is one of the more useful selections from the edit sub-menu. Notice that when a typical report layout is viewed, the fields formatting is displayed as several X's, mm/dd/yy, or 999,999.00. Attempting to distinguish the company field from key5 would be a difficult task since all the fields appear the same.

After selecting the "Show Field Names" option, GoldMine would instead display the field's actual name. This would make it much easier to identify each individual field. Please note that this option not only affects the currently selected field, but rather, all of the fields which are currently part of the layout. In addition, the name of the database they correspond to will not be displayed, except on the status bar of the layout.

This may cause some confusion if for example, the contact1->contact and the contsupp->contact fields have been inserted. In this case, the primary mouse button would need to be used to click on the field in question, this will show the full name of the field in the GoldMine status bar.

Lastly on the edit sub-menu, is the properties selection. The window displayed below appears when the properties window of a data field is selected.

Notice the three different sections and buttons on this window.
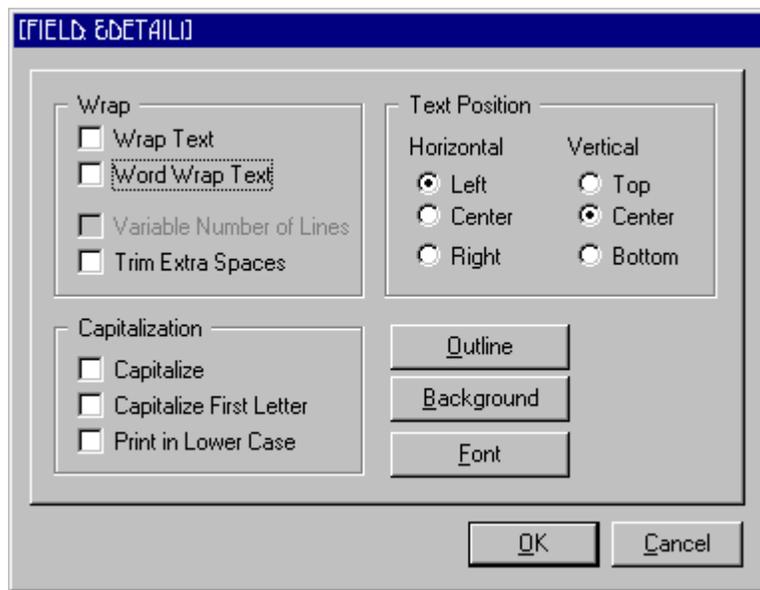
Wrap

The wrap section defines the manner in which the text within the selected field will be handled.

The wrap text option will cause the text to be broken at the last character that can fit within the allocated space for the field, regardless of whether or not the whole word is printed. Fields can be resized to accommodate longer text by selecting the field and dragging the field's handle to the desired size.

Word wrap text behaves much in the same manner as the wrap text option except for one minor difference. Instead of breaking the text after the maximum number of characters has been reached, it would break the text after the maximum number of words that can fit in the field has been reached. Therefore, if the entire word does not fit, it will not be displayed on the current line.

Should either of these two options be selected, the "Variable Number of Lines" option will become available. This option instructs the report writer to print out the data corresponding to the field, in as many lines as necessary.

If "Variable Number of Lines" is not selected, the text will be displayed in the exact number of lines that has been defined for the field. For a scenario in which the field is only one line long, but the text needs to be wrapped, any characters after the end of the line will not be displayed, because they require an additional line that does not exist. A good example of where this option is useful is when printing notes or DayTimer style reports that **must** be a fixed length.

Suppose there are two contacts in the database, one has one sentence of text in the notes and the other an entire paragraph. The notes field is inserted on the layout, but does not have the variable number of lines option selected and the field itself has not been expanded to include multiple lines. When the report is generated, the notes for the first contact will most likely appear to generate correctly. However, the notes for the second contact will not print beyond one line.

When selecting the variable number of lines option, it does not require that the field be stretched vertically to accommodate the additional lines of text. The multiple lines are generated automatically until the entire text has been printed.

Note: One important exception to this feature is that a notes field can not print past the end of a page, unless it is being printed within the Detail 1 section only. This limitation can make some reports difficult to write, however the ability to print past the end of a page in all sections, may be added in future versions. An example of this situation is a pending and history report, where the notes of both pending and history need to be printed.

Since only pending, history, or supplementary data can print in one detail section at a time, the person designing the report would need to choose if they would like either the pending or the history notes to print past the end of a page. Once this has been decided, either the pending **or** the history fields would be placed in the detail 1 section, enabling the notes to print past the end of the page.

The "trim extra spaces" option trims any blank spaces trailing the text of the field.

Capitalization

The capitalization section is used to change the case settings of the field's text. The three options available are Capitalize, Capitalize First Letter, and Print in Lower Case.

The first option converts all the text to uppercase when it is printed, regardless of how it appears on the contact record itself. The second option will generate the data in proper case, meaning that the first letter of each word will be capitalized, but the rest of the letters will appear in lowercase. Lastly, the "Print in Lower Case" option will print all the characters in lowercase, regardless of their case on the contact record.

It is not necessary to select any of these three options. In the case where none are selected, the text will appear on the report in the same case as on the record.

Text Position

Lastly on this window, the text position section is used to define horizontal and vertical alignment of the field's text. Text can be centered, right or left justified using the horizontal options. Vertical alignment settings may also be specified.

The outline, background, and font buttons perform the same function as selecting outline, background, or font from the Edit sub-menu as previously discussed.

Insert

Back on the main local menu, the next selection is the "Insert" option. The report writer allows the insertion of several items onto the report layout.

Label

The first of these options is "Label." A label is most commonly used to label columns that are going to be generated on the report, similar to labeling cells in a spreadsheet. A picture of a label properties window is displayed below.
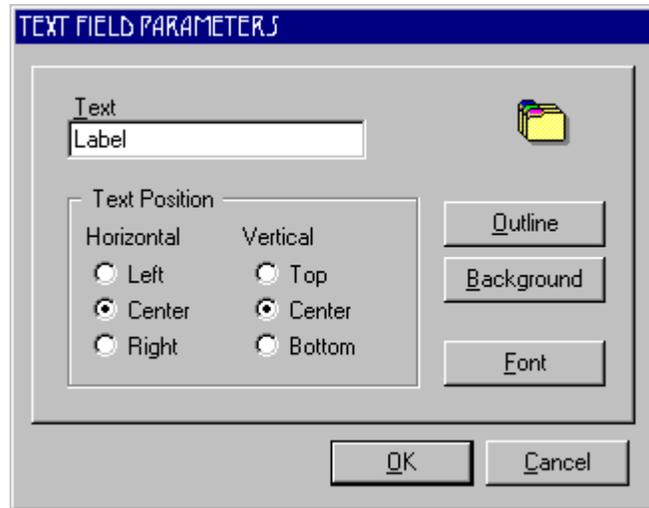
The desired text for the label is entered in the "Text" field. Although the amount of characters that can be typed is virtually unlimited, there is a limit to how much data will be displayed on the report by this field. The field will display only a single line of text, since label fields do not have a "Variable Number of Lines" option. Please refer to the "Hints & Tips" section of the documentation for a special trick on inserting multiple lines of text.

Aside from the text field, the other options displayed on this window are used to position the text, configure the outline of the field, modify the font and also set a field background. Deleting the characters within the text field and defining a background for the field, is a technique used to create separators within the reports. These separators can be seen in many of the existing reports.

Section

There are seven different sections that may be inserted. The different sections are as follows: Page Header, Report Header, Sort Header, Detail Section, Sort Footer, Report Footer and Page Footer.

Page Headers

Page headers will appear on the top of every page of the report, regardless of how many pages are required. It is helpful for including such information as report titles or in some cases, column labels. Any field inserted on this section will be printed on every page, without being refreshed. For this reason, it is not a good practice to include database fields in this section. For example, fields like &user (the currently logged in user who printed the report) and perhaps dialog fields would be suitable fields for the page header.

While the contact or company name would not be suitable fields for the page header since it will not change, no matter how many pages are printed.

Report Headers

Report headers are similar to page headers in that they appear on the top of a report page. However, they differ from page headers because the data contained within this section is only printed once, on the first page of the report.

Sort Headers

The next available section, the sort header, is a very important section. As mentioned earlier, the break field is defined within this section. The maximum number of sort headers that can be inserted is nine. Normally, data fields would not be inserted into the sort header, although there is no harm in doing so. Usually, column labels for the Detail Section data are inserted on this section.

For example, suppose the report is printing calendar information for each company. It would be acceptable to put the company, contact, address, and phone fields into the Sort Header. Since the Sort Header is only printed once per company, in this case, it will print the company information properly. The Detail Section linked to this Sort Header would then print all of the calendar activities for the company listed in the Sort Header.

Detail Sections

Detail Sections are used to generate the core pieces of data for the report. The Detail Sections work in conjunction with the defined Sort Headers.

Studying the existing report layouts shows that on some report layouts, like the "Contacts with Profile Tab" report, there are more Sort Headers defined than Detail Sections. At first glance, it would appear as though the report is incorrectly configured because of this irregularity. The first question is, which Sort Header corresponds with which Detail Section?

Normally, reports like the "Contacts with Profile Tab" would contain contact1 and contact2 fields in the Sort 1 Header section. The Sort 2 Header on this report would correspond to the Detail 1 Section. This is because there is only one record for each contact in the contact1 and contact2 databases, therefore there is no need for a Detail Section to print additional information for the Sort 1 Header (since it does not exist). The Sort 2 Header does need a Detail Section since it needs to print multiple profiles for this company. Just like with Sort Headers, you are limited to a total of nine different Detail Sections.

This means that in order to print contact1.dbf and contact2.dbf information along with conthist, contsupp, and cal data, at least two Sort Headers and one Detail Section would normally be used. One Sort Header for both contact1 and contact2, one for conthist, for

contsupp, and for the cal database. Then one detail section for each Sort Header, with the exception of the Sort Header used for contact1 and contact2 data.

In the example report, the first sort header will be used to sort the main contact information. Any fields from the contact1 or contact2 database should be inserted onto this sort header. The recommended break field for this section should be the accountno field of the contact1 database.

The second Sort Header works in conjunction with the contsupp (profile) data from the Detail 1 Section. The two are linked by the break field in the Sort 2 Header. Normally, fields containing data should not be inserted into this Sort Header. In this case the header should only contain text such as labels or column headers, not the data fields themselves.

The Detail 1 Section should contain all of the data fields pertaining to the profile data, in this case contsupp.dbf fields.

Note: If the Sort 2 Header break field is not configured properly, the report will not generate the correct data. This can manifest itself by printing duplicate information, printing only a single record, or printing records that do not belong to the correct contact record. However, as stated before, an incorrect sort specified in the Sorts button on the main reports screen may cause the same results. For this reason, when designing a report, it is always best to keep the sorts in the Sorts button simple, then once the report is printing the correct information, the sorts can be modified to sort the data alphabetically or by date and time. This will aid in determining whether the report was written correctly, or if an incorrect sort was causing the report to print the wrong information.

The break field within the second Sort Header should instruct GoldMine to retrieve data from the contsupp database. Logically, one would want to use a field from the contsupp database to accomplish the task. A good break field in the contsupp database would be the accountno field.

GoldMine's report writer provides an additional method for defining break fields by using the &suppfile macro. This special macro can be used to access the cal, contsupp, and conthist databases. In addition, it permits one to specify a particular rectype value within any of these databases. A rectype, or record type is a set of characters that GoldMine uses to specify the kind of record within the database. For example, a rectype of "P" in the contsupp database specifies that the record is a Profile. The manual lists many of these rectypes and their associated meanings in the Database Structures chapter. A properly defined &suppfile macro will have a minimum of two values, but may contain an optional third value.

The following table lists the possible values.

	Database	Rectypes
Calendar	*&suppfile="ca"*	*a, c, t, d, m, s, o*
Contsupp	*&suppfile="cs"*	*c, p, r, l, o*
Conthist	*&suppfile="ch"*	*a, c, t, d, m, s, o*

The appropriate macro setting for this report would be &suppfile="csp". Again, the first two letters designate that the database to be accessed is contsupp. The last character narrows the data down to the rectype of "P" which are profiles. We will examine the other possible values when we discuss macros later in the documentation.

Since the break field will be defined within the second Sort Header, the "&sort2" value should be appended to the macro. The final break field value will look as follows:

&sort2&suppfile="csp"

In order to prevent non-profile records from erroneously being generated, the same macro should also be used as a filter within the Detail Section. However, the "&sort2" prefix to the macro should be removed before doing so.
The final Detail Section filter will look as follows:

&suppfile="csp"

The detail section is now prepared to generate contsupp data.

Data fields from files other than the database specified in the break field should not be inserted for a couple of reasons.

The manner in which the report is configured instructs GoldMine to print the main contact and all profiles associated with that contact before moving on to the next contact record. This means that if the contact "John Smith" has three profiles, those being one E-mail Address entry, a Birthday entry and a Computer type entry, the report would generate the contact data and the three associated profiles, as displayed below.

Sort 1
Header Data ⟍ **John Smith**

Sort 2 ⟍ **Profile Name**   **Reference**
Header Data ⟍ *Birthday*   *2/22/70*
               Computer Type   ***Pentium II 400MHz***
Detail 1 ⟍ ***Internet Address***   ***myname@whatever.com***
Section Data

Suppose the key5 field was inserted alongside the profile reference field. A minor problem develops, due to the fact that the number of profiles that will be printed for each contact varies. There is a one-to-many relationship between the contact1 database

records and contsupp database records. The report is structured to specifically handle this, however by placing a contact1 field with the contsupp fields, erroneous information may be printed. At the very least, the key5 field will be printed over and over, once for every profile being printed.

The detail section will reprint as many times as necessary to include all the profiles associated with the current contact. Using the "John Smith" record as an example again, note that the detail section will reprint three different times to correspond with the total number of profile records.

Each time that the report switches to a new profile record, the data fields in the detail section are refreshed to reflect the information for the next profile record. If the key5 field were inserted in the detail section, the report engine would try to refresh the data within the field when it switches to the next profile record. However, refreshing the key5 field would not yield new data, since we are still dealing with the same contact record. Instead, the report would generate the same key5 field information three times, once for each profile record.

What about inserting cal or conthist database records, they also have a one-to-many relationship? Indeed, the cal and conthist databases do have a one-to-many relationship with contact1 records. However, the break field specified in the Sort 2 Header instructed the report writer to access the contsupp database file. For this reason, inserting fields from the cal or conthist files into this particular Detail Section or even the Sort 2 Header itself, would generate confusing and erroneous data. Therefore, inserting fields from databases that do not correspond to the assigned break field should be avoided.

Sort Footers

Sort footers are the last sections printed that pertain to the current contact and will be printed once the Sort Header has finished the current break field. Specifying a Sort Footer for a Sort Header which is breaking on contact1 or contact2 information is usually not needed. A Sort Footer is usually used when printing totals, such as how many calls or appointments a particular user had on a pending or history report. This is another section where database fields are usually not printed, only calculation fields. However, like the Sort Header, you may print fields such as contact or company name but fields within the cal, conthist, or contsupp databases should **not** be printed in the Sort Footer.

Just like Sort Headers, Sort Footers are also numbered and limited to a total of nine. Sort Footers correspond directly with the correspondingly numbered Sort Header on the layout (i.e. The Sort 1 Footer corresponds with the Sort 1 Header, etc). Furthermore, note that you can only insert as many Sort Footers as there are sort headers. For example, if there are five Sort Headers on the layout, the maximum number of Sort Footers that can be inserted is five.

The fields that can be inserted onto a Sort Footer are not any different than those that can be inserted in any of the other report sections. The main difference between the Sort

Footer and the other non-footer type sections, is the ability to perform summarization operations using expression fields. The summarization operations include: Value, Total, Count, Average, Min, and Max. This allows expressions to be built which could count the calls made by a user, or total all of the sales for a particular company. Analysis reports make extensive use of this functionality.

Report Footers

Report Footers provide the same summarization functionality of Sort Footers, but vary slightly in their implementation. This type of footer will only be printed once, on the last page of the report. Therefore, any calculation performed within this section will pertain to the entire report, not just the current contact, such as in the case of the Sort Footer.

Report footers are helpful to generate overall counts, such as counting the total number of contact records included in the report, total sales for the company as a whole, or the total number of calls made by all users.

Page Footers

Page footers appear at the bottom of every page for the report, regardless of how many pages are in the report. There are several uses for page footers. The most typical use for a Page Footer is to print the pages number. Most of the reports that come with GoldMine by default, also use the Page Footer to print the date the report was printed and the user that printed the report.

To insert the page number, the system field "Page" would need to be added to the Page Footer section. System fields are found on the Insert sub-menu of the report layout local menu. Again, it is highly recommended that database fields not be placed in a Page Header, Report Header, Sort Footer, Report Footer, or a Page Footer.

Data Fields

Different data fields can be inserted by selecting Insert | Data field from the report local menu. Notice the drop down menus and expression field on the window that appears when this option is selected.
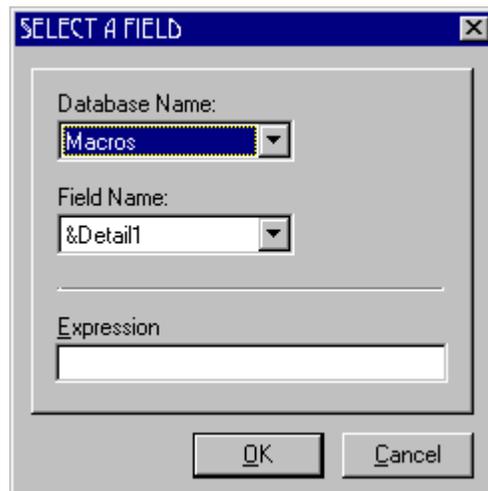
The database drop down box allows for the selection of the database that contains the field that needs to be inserted.

Except for the "Other Reports" and "Calendar Printouts" categories, the available databases are contact1, contact2, contsupp, conthist, cal, opmgr, opmgrfld, and the report macros. Within the "Other Reports" category, the available database names are users, lookup, filters, reports, rolodex, forms, scripts, mailbox, opmgr, opmgrfld and macros. Within the "Calendar Printouts" category, the available databases are cal, contact1, contact2, opmgr, opmgrfld and macros.

The field name drop down box will display the names of the fields that correspond to the selected database. Note that the contents of the selected field can only be viewed once the report is generated. For this reason, it is helpful to know ahead of time, in which database and field the desired data is stored.

Expressions can also be inserted by entering them in an Expression Field. FactsBack document 386 details the extent of the functions that are supported within GoldMine. In addition, the report writer allows the use of additional dBase functions. However, the use of some of these functions are restricted to only this particular expression field box. The expression fields added by specifically adding an Expression Field from the local menu, will not accept these dBase functions.

Expression Fields

Next on the insert sub-menu is the "Expression Field" option. Expression fields are very helpful, they can be used to perform various functions, including calculations.

There are two different approaches to creating an xBase expression within the field. The first method is to simply type the expression, while the second would require the use of the buttons displayed. Fields, functions or operators can all be selected by using these buttons.

Expressions written within this field are limited to 299 characters in length and no more than 23 functions or operators. This means that the expression may contain a maximum of 23 pairs of parenthesis, if's, and's, or's, then's, or even +, -, *, /, <>, >, <, and = signs. If the expression contains too many functions or operators, the following message will be displayed when the OK button is clicked, "Too many Field Names, Operators, or Functions".

GoldMine automatically checks the validity of the expression when the user selects OK. This is not to say that it checks the expression logically, but rather the syntax of the expression, since only the person writing the report knows what information they need the report to generate.

Note that GoldMine will first prompt users for a field name immediately after selecting Insert | Expression Field. The name of the field does not have any bearing on the function of the field, it is merely a reference, this name will appear in the status bar when the field has been selected. An important point to remember is that an expression field can not reference another expression field in a calculation.

For example, suppose one expression field is called "Total_Sales_Amount", while another field is called "Total_Number_of_Sales", you may not use another expression field to divide the first field by the second since the report writer has no way of referencing the other expression fields in a calculation. Aside from data and system fields, the only other fields that may be used in an expression field are dialog fields. This is because a dialog field remains the same throughout the report, since they are specified by the user printing the report at runtime.

Once named, a window like the one pictured below will be displayed. The specified name appears on the title bar.
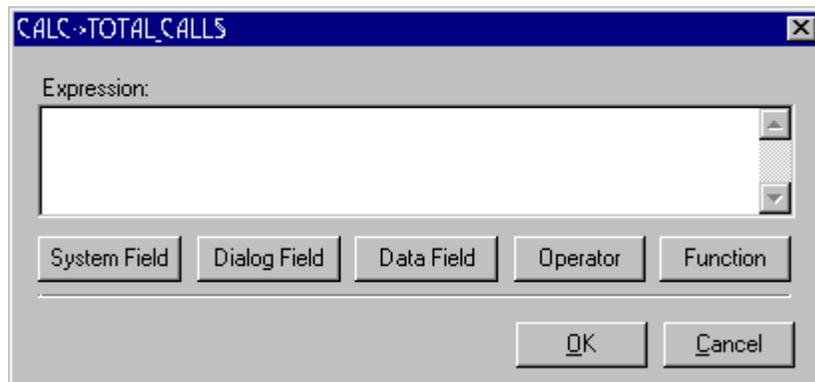
Notice the five buttons below the text area, beginning with System Field and ending with Function. These buttons are used to select different components of an expression.

System Fields

Selecting the system field button will open the following window displaying the available fields.
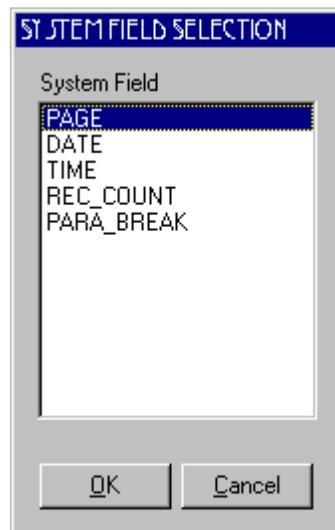
The "page" selection will insert the page number for the individual pages of the report. If used, it is best to insert this field in a page footer section.

The "date" and "time" options insert the current system date and time, respectively. This is helpful for printing the date and time on which the report was generated.

The "rec_count" field option returns the number of records printed in the report at that point. This could be useful for counting the number of activities printed for a user, if the report were set to print only for a particular user and the rec_count field were placed in the page footer or report footer.

The last option, "para_break" is used to insert a paragraph break on the report layout. For example, assume the following expression field was inserted onto a report layout.
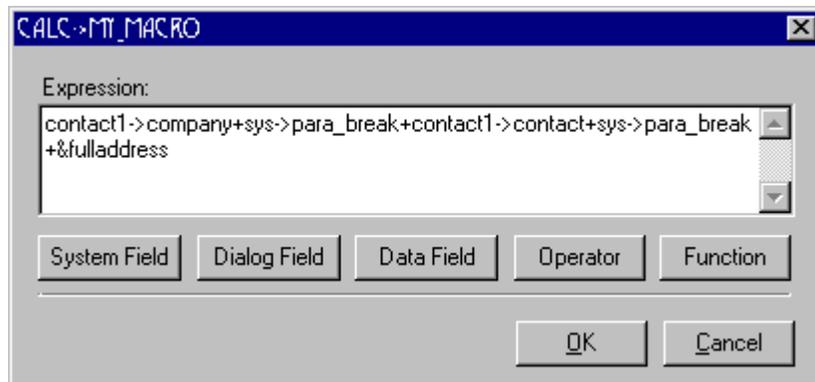
Further assume that the variable number of lines and word wrap text options from the field's properties window, have been selected. The final output would appear as displayed below:

Smith and Sons Furniture
John Smith
1050 Main St.
Smithtown, MO 46020

Notice how a line feed has been created after each field by inserting the para_break system field in between each data field.

Dialog Fields

Dialog fields are special user-defined fields that can be used to capture user input before printing the report. Dialog fields function like any other data field, in that they can be used to generate output or be referenced in expressions. The process of defining new dialog fields will be discussed later.

Data Fields

The next button, data fields, will bring users to the "Select a Field" window. From this window, a database and field name can be selected. This is the same window accessed by selecting Insert | Data Field from the local menu.

Operators

The Operator button is used to display a list of the supported operators within an expression. Standard operators such as "Equal to", "Contains", or "Greater Than" may all be selected from within this window. Furthermore, "if..then..else" and other statements can also be used within the expression field. The following is a listing of some of these operators and how they are used.

$ Contains operator, searches for the specified text anywhere within a field.
Syntax: .if.("A" $ contact1->company) .then."Company contains an A".else."Company does not contain an A"

.total-of.   Will sum the values of a numeric field. Best used in a report footer or sort footer, since it will provide a total of all the values of the field specified. If used in a detail section, the report will show a *running* total, until the final record in that section has printed (at this point it becomes a true total).
Syntax: .total-of.contact2->unumeric1

.ave-of.   Provides an average of the values in a numeric field divided by the number of records generated. Best used in a report footer or sort footer, since a *running* average is almost always useless.
Syntax: .ave-of.contact2->unumeric1

.max-of.   Returns the maximum value contained within the specified numeric field. Best used in a report footer or sort footer.
Syntax: .max-of.contact2->unumeric1

.min-of.   Similar to .max-of. operator, but instead returns the minimum value. Best used in a report footer or sort footer.
Syntax: .min-of.contact2->unumeric1

.count-of.   Counts the number of records processed in a section.
Syntax: .count-of.contact2->unumeric1

Functions

The last button on this window is the "Function" button. There are a wide variety of dBase functions that may be used within the report writer. The window below displays a listing of some of these functions and a brief description of their usage.

```
SELECT A FUNCTION

Len(string)          -> Length of a String
Upper(string)        -> Convert to UPPER CASE
Lower(string)        -> Convert to lower case
Trim(string)         -> Trim Beginning and Ending Spaces
Word(string,num)     -> Extract a Word from the String
Char(string,num)     -> Extract a character from the String
Min(num1,num2)       -> Find Smaller of two Numbers
Max(num1,num2)       -> Find Larger of two Numbers
Int(num/string/date)        -> Convert to Integer Number
Round(num1,num2)-> Round Num1 to Num2 Decimal Places
Abs(num) -> Find Absolute Value
Weekday(date)        -> Day of the week (string)
Day(date)            -> Extract Day (nn) from a Date
Month(date)          -> Extract Month (nn) from a Date
Year(date)           -> Extract Year (nnnn) from a Date
Mid(string,num)      -> Extract Characters from String starting at (num)
Left(string,num)     -> Extract First (num) Characters from the String
Right(string,num)    -> Extract Last (num) Characters from the String

                                    OK        Cancel
```

dBase Functions

As was previously mentioned, there are two different places in which a function can be used. The first, when selecting Insert | Data Field, and the second is when choosing Insert | Expression field. However, certain functions can only be used exclusively within an expression field. Those functions are listed below.

1. Trim   2. Len   3. Lower   4. Word   5. Char   6. Min
7. Max   8. Int   9. Abs   10. Mid   11. Text   12. Double

Much in the same manner, the following list is exclusive to the expression field of the "Select A Data Field" window.

1. Date   2. Substr   3. DtoC   4. DtoS   5. Ltrim   6. Reccount
7. Recno   8. StoD   9. Time   10. Val   11. Str   12. Iif
13. CtoD

Additional Notes

Expression fields may also be used to perform various numeric calculations. For example, analysis reports often use the following syntax to create counts of the records printed.
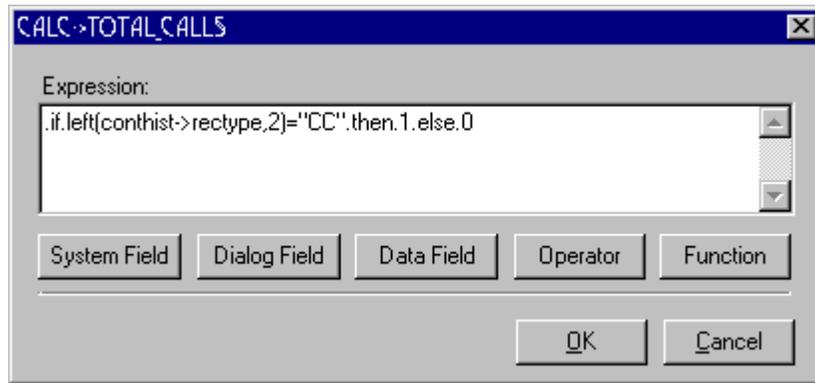
This expression would generate a total of all the scheduled callbacks which have been completed. However, the expression will only total the number of callbacks when placed into a section footer. This is due to a special feature of expression fields when added to section footers.

The feature is called the "Summarization Type" and may be found on the field properties window. This allows the report writer to provide totals, min, max, averages, and counts much like the operators discussed earlier.

Expression Field Properties

Double clicking on the expression field would open the calculation field properties window, pictured below.
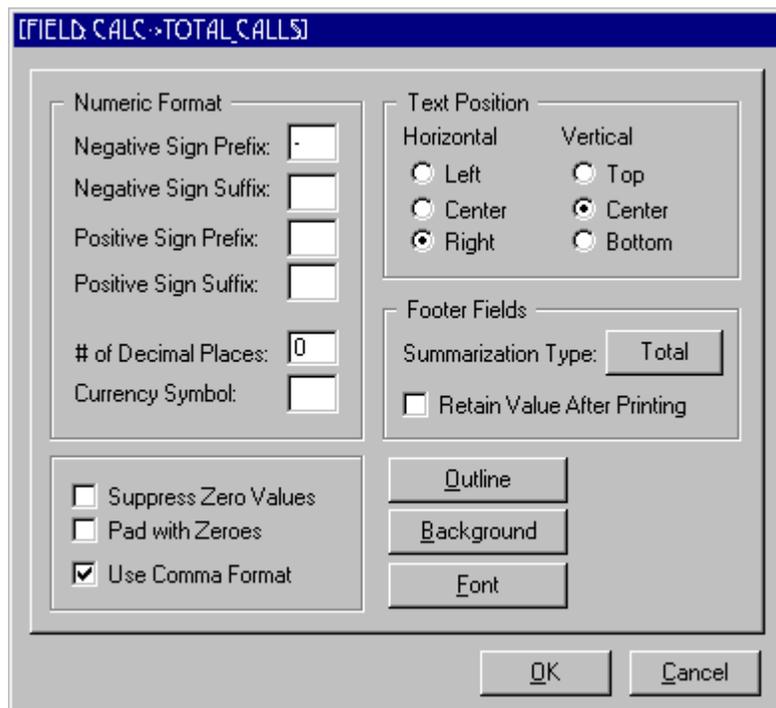
There are several sections and buttons to this window. The text position section, outline, background and font buttons perform the same functions as in other property windows discussed earlier.

Numeric Format

Under the "Numeric Format" section, several options can be defined. The negative sign prefix option is used to designate a particular prefix for any negative amounts. Negative sign suffix is used to specify a symbol to be appended at the end of any negative number. Usually, a minus sign is used to prefix negative amounts. However, in the field of accounting, parenthesis are usually used surrounding a negative value. To accomplish this, place an (in the negative sign prefix box, and a) in the negative sign suffix box. The result would be (100.50), instead of –100.50.

Similar in nature are the "Positive Sign Prefix" and "Positive Sign Suffix" values. The difference being, that these settings apply to positive numbers, instead of negative numbers.

A set number of decimal places may also be configured. This setting is defined in the "# of Decimal Places" field. Currency symbols, such as dollar signs, may also be specified.

There are three additional check boxes that appear on the lower left-hand corner of the window which are used to perform a few additional tasks.   The first option, suppresses zero values, which will instruct the report writer to print a blank for any calculation (expression) field that evaluates to zero. If not checked, the field will print a value of "0", which often times is seen as an eye sore in a professional report.

Pad with zeroes will right or left justify the numeric value by filling the blank spaces to the left of the first digit with zeros. For example, suppose a numeric field is 10 digits long, however the values in the field are of different lengths. To line up all of the values, this box would be checked to add the extra 0's required to fill in the remaining digits, so each field is exactly 10 digits long.

The final check box, "Use Comma Format," instructs GoldMine to place the standard comma after every 3 places, such as "1,000" or "1,000,000."

Footer Fields

Of significant importance on this window is the "Footer Fields" section. Please note the button next to "Summarization Type". This button is very important, since it allows the field to perform a total, average, count, min or max as discussed earlier.

The Value function is a special case, this will print the last value encountered from a detail or sort header. There are vary few cases in which the Value function should be used, however it is provided in the event it is needed.

The picture below shows the options displayed when this button is selected.

System Fields

Returning to the sub-menu of the Insert selection, the next option is "System Field." Selecting this option will cause the system field selection window to be displayed. System fields were discussed in full detail when discussing the expression field options.

Lines

Lines can also be inserted onto a report layout to draw boxes, separate data, etc. Several options for a line can be defined by double clicking on the line after placing it on the layout.

The picture below displays the line properties window.
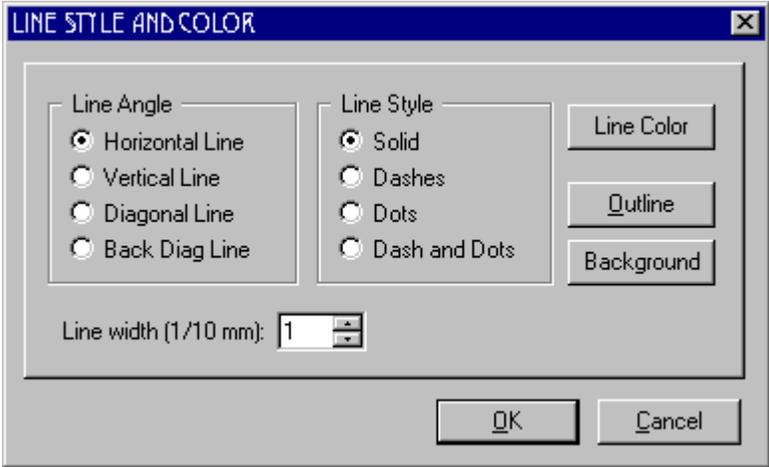
The line's angle, style, width and color can all be set from this screen. In addition, the background and outline of the field that contains the line may also be customized.

Images

The GoldMine 95 report writer also provides built-in support for standard Windows bitmaps. To insert a bitmap image onto a report layout, select Insert | Picture. Once inserted, the field containing the image can be moved about the layout just as any other field. However, aside from resizing the image, modifications or additional customizing of the field or image are not permitted.

Duplicating Fields

Should there be a need to insert a particular field multiple times onto the layout, two approaches can be taken to accomplish the process.

The most common solution would be to use the standard Windows cut and paste features. A second method is to first, select the desired field, then choose Insert | Duplicate Field from the local menu. Drag the duplicate field to the desired location on the layout, then click the primary mouse button.

For example, suppose there is a large field view that needs to be included in the report. Assume the field view has thirty fields vertically, and five fields horizontally. A quick way to duplicate a spreadsheet style listing of thirty fields by five fields would be to insert the first five fields in a row, then hold down the primary mouse button and drag a box around the five fields. Then select Edit | Copy (CTRL C) from the report local menu, and finally Edit | Paste (CTRL V), to paste a duplicate row of labels. Repeat the copy process again, now that there are even more rows to copy the process of adding all thirty rows will happen quickly.

Arrange

Once the items have been added to the report layout, it is usually helpful to align the fields in order for the report to look organized and professional. For example, if labels are printed, most users would want the last letter of each field to be aligned with each other. Otherwise, some of the text will appear to be indented in comparison with the other text.

GoldMine's report writer has built in arrange functions allowing users to align fields in a variety of ways. These include vertical/horizontal alignment, vertical/horizontal sizing, and vertical/horizontal spacing.

All of the arrangement operations use the outline of the field as a basis for the fields size and position. The outline of a field is the dashed border displayed when a field is selected. Note that when these operations are performed, the field that is used as a guideline is the upper most left hand field.

The last option of the arrange sub-menu permits users to undo the most recent change made.

Centering

The center option of the local menu is used to center the fields on the layout. This differs from the centering of the text. Centering a field will instruct the report writer to center the currently selected field(s) within their corresponding section.

Grid Settings

In order to facilitate the alignment of fields, GoldMine also provides a grid feature.

By default, the "Grid Settings" option will be checked, meaning it is active. Selecting the option from the local menu presents the following dialogue box.
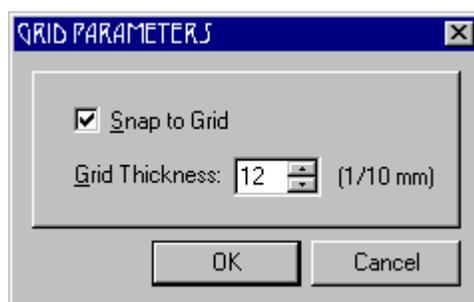
The snap to grid function can be deactivated from this window by unchecking the "snap to grid" checkbox. Furthermore, customizing of the grid thickness may also be performed.

Note that the deactivation of the feature and custom grid thickness will only apply for the current layout session. If the report is previewed or the layout is exited for any other reason, the settings will be reset to the default settings.

Printers

Sometimes, it required that the report be generated by a special printer. Usually, the main reason for doing so would be to create the report on a custom paper size or perhaps a printer that prints only envelopes, labels, etc. A more simple case, would be when it is also necessary to print the report in landscape as opposed to a portrait layout.

Printer settings for a report layout are set through the layout's local menu. From the local menu, select "Printer Setup…", this will open the print setup window displayed on the following page.
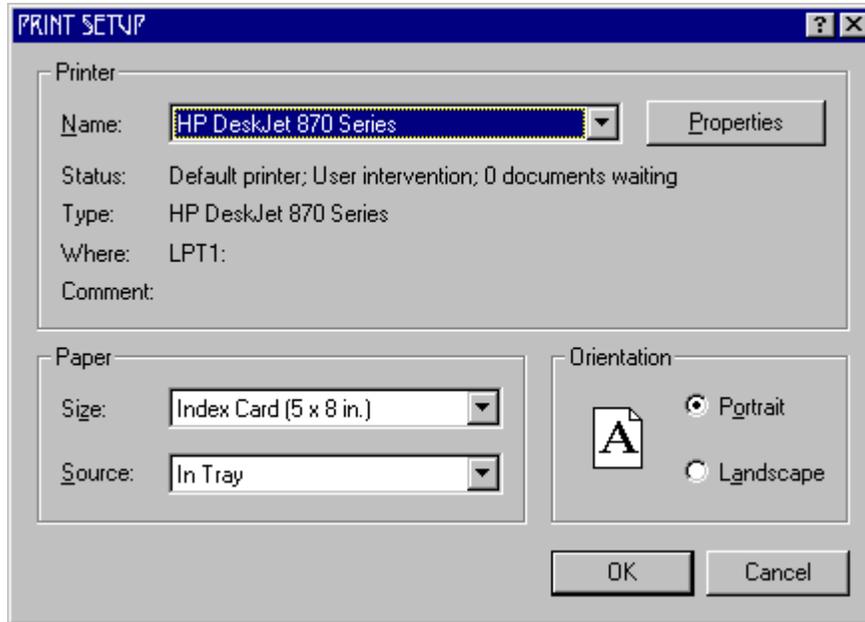
A specific printer, paper size, orientation, and other settings can be configured from this window. To define a custom paper size, click on the properties button. Please note, this is not a function of GoldMine. The definition of custom paper sizes and everything viewed on this screen is a function of the printer driver, not the GoldMine report writer.

The printer setup screen is the same screen seen in all programs used in Windows, though some programs may change the standard window to add additional features controlled by the program. An example of these special features would be in Microsoft Word, which adds additional settings for number of copies and certain pages to print.

Should a printer other than the default be selected for a report, the "Layout Printer" option should be selected on the report's properties. Note that the landscape and portrait settings carry over from one printer to the next, since this deals with the orientation of the report, it should not matter which printer is being used.

Report Settings

Options

The picture below displays the options which can be configured for the report, accessed by selecting Report Settings | Options from the local menu.
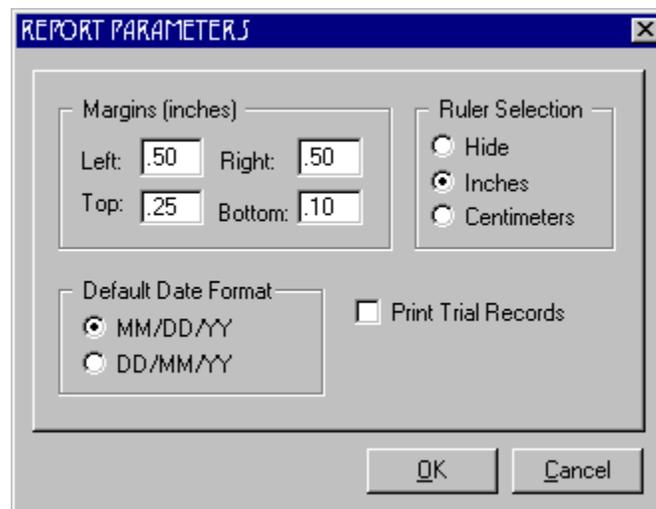
The margins, date format and ruler options can all be configured from this window.

The margin option is one of the most important sections of this window. Margins determine the printable area on the report layout, just like in a word processor. Margins are very important when attempting to print different sized labels. Note that the margin settings are in inches only.

The ruler section permits users to hide the ruler or switch the measurements from inches to centimeters.

Lastly, the date format section is used to change the formatting of dates which will appear on the report. Though, this setting may be changed on an individual field bases by accessing the field's property window. By default, the formatting will be set as pictured above.

Filter

Next on the sub-menu is the "Filter" selection. A report filter is an expression that is applied to the report in general, regardless of what type of data the report has been configured to generate.

Selecting this option will open a "Record Selection Criteria" window; similar to the one used when adding expression fields. Within this window, the desired expression can be created. These expressions may filter data based on any of the databases accessible to the report category.

Size

The size option allows the user to expand or compress space in the report layout. Click the left mouse button in the layout and drag it, creating a box outlined in dotted lines. By choosing the size option, you can choose to expand or compress the space in the report vertically or horizontally by the amount of space selected by the box drown.

Dialog Fields Table

Create

When first selected, the "Dialog Fields Table" option only permits the "Create" option, since there are no currently defined dialog fields for the report. Dialog fields are user defined fields which prompt users for information once a report starts to print.

The main use for dialog fields are for making filters or expressions from data that must be provided, but that can not be easily retrieved from the database. They can also be used as a means of forcing the user to provide input, either as some sort of security measure or to simply make the report easier to use.
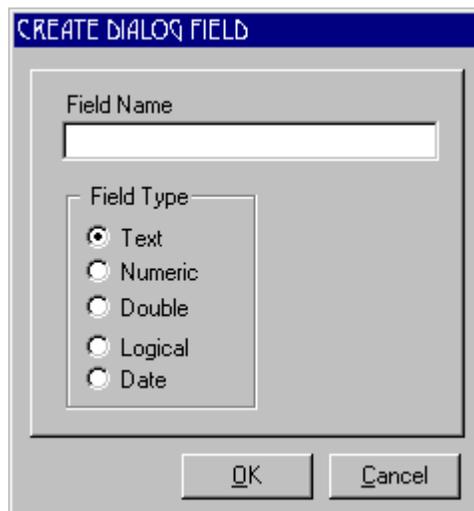
The above picture displays the "Create Dialog Field" window. A field name and field type must be defined for each individual dialog field.

As was previously mentioned, dialog fields are extremely powerful since they allow interaction between the user and the report writer. GoldMine will not print the report unless input is provided for the all of the dialog field(s) in a report. This is particularly helpful since dialog fields can be referenced within expressions and filters.

The report writer will automatically prompt the user for input, without any further configuration settings in the report layout or field. In other words, once a dialog field has been defined, the user will be prompted for input once the user prints the report.

Modify

Assuming multiple dialog fields have been defined, the report writer will prompt the user for the various dialog field inputs based on the order in which the fields were created. However, situations may arise, when the order needs to be changed.

The modify option of the dialog field tables sub-menu, accesses the dialog field's properties. When selected, a listing of all the defined dialog fields will first appear. Choosing one of the fields will cause the following window to be displayed.
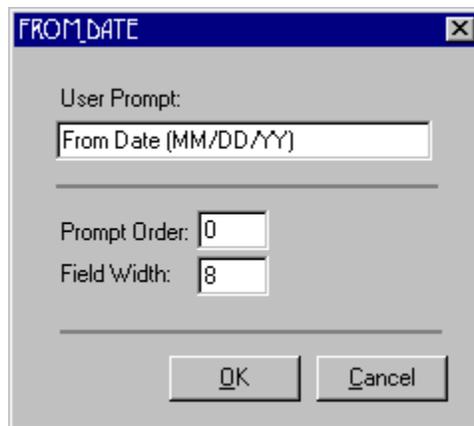
The prompt order value is used to modify the prompting order of the dialog fields when the report is generated. If multiple fields share the same prompt order value, the field that was created first will prompt for input.

Field width settings are used to expand or decrease the amount of input which the report will accept. For example, if the dialog field is being used to capture a GoldMine user name, it would make logical sense to restrict the field's input to eight characters. Since the maximum length of a GoldMine user name is eight characters, anything greater would be an invalid entry and could cause problems in a case where the captured data is being used within a filter or expression.

The text specified in the User Prompt field will be displayed on the dialog field at runtime. Although a large amount of text can be typed into the field, the dialog field will only display the first thirty of those characters. The picture on the following page displays a typical dialog field prompt.
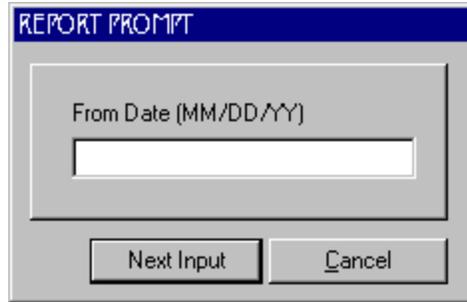
Clicking cancel on a dialog field prompt window, will close the report writer and place the user back at the main contact record view. The next input button advances a user to the next prompt in the sequence.

Delete

The delete option from this sub-menu allows the deletion the dialog fields that are no longer needed. Selecting the modify or delete option will first open a window displaying all the defined dialog fields.

Dialog Fields in Calculations and Filters

Calculation Fields

Consider the following situation: A company has created a report in which all user's sales are printed, however a particular sales person would like to see only their own forecasted sales total. A report could be setup to provide a dialog field which prompts for a username, we will assume the field is called "UserName". The following calculation field in a section footer could be used with this dialog field, to calculate the total forecasted sales amount.
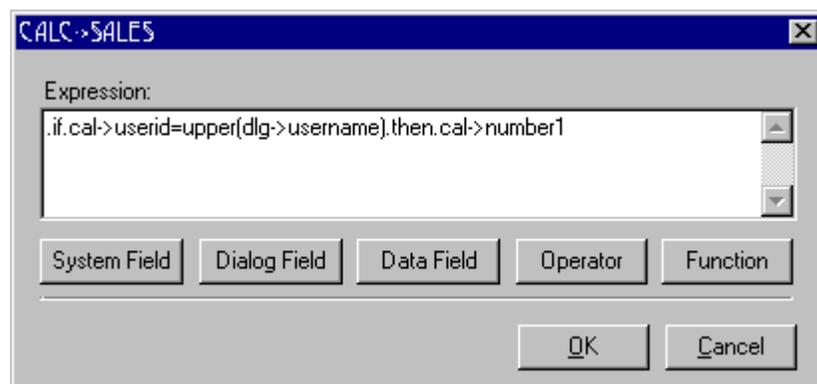
Section or Report Filter

As in the previous example, now assume that the report should prompt the user for a date range. Two dialog field could be added, one called "From_Date" and another called

"To_Date". To limit the report to forecasted sales falling within this date range, a report filter could be setup as follows:
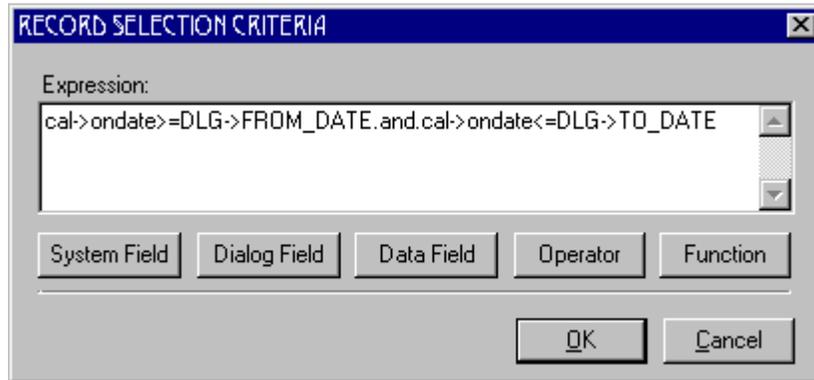
RECORD SELECTION CRITERIA

Expression:

cal->ondate>=DLG->FROM_DATE.and.cal->ondate<=DLG->TO_DATE

System Field | Dialog Field | Data Field | Operator | Function

OK | Cancel

Macros

The following is a compiled listing of information pertaining to the macros used within GoldMine reports along with a short description.

Some macros are only available within the "Calendar Printouts" reports category. The remaining macros are available in all of the report categories. They have been separated within this document for organizational purposes.

All Report Categories

&FullAddress   Displays Address1, Address2, City, State, Zip, and Country. Address lines are separated by a line feed. City, State, Zip values are displayed on one line.

&Company&Address Displays Contact Name, Company Name, Address1, Address2, City, State, Zip, and Country. All fields are separated by a line feed. City, State, Zip are displayed on one line.

&Address1&2   Displays Address1 and Address2 data separated by a line feed.

&Contact, Company   Displays Contact Name and Company Name separated by a semi-colon.

&Name&Address   Displays Contact Name, Title, Department, Company Name, Address1, Address2, City, State, Zip and Country. All fields are separated by a line feed, except for City, State, Zip which are displayed on the same line.

&Company, Contact   Company Name, Contact Name separated by a semi-colon.

&Title&Address   Contact Name, Title, Department, Company Name, Address1, Address2, City, State, Zip, and Country. All fields separated by a line feed, except for City, State, Zip which appear on the same line.

&CityStateZip   City, State, Zip displayed on the same line. City and state values are separated by comma.

&SourceFile   Returns the name of the database file being accessed in the current section.

&CalActvName   Outputs the name of the scheduled activity printed, based on the rectype. For example, if a record of rectype S is printed, the macro will return a value of "Sale".

&HistActvName   Works in the same manner as &CalActvName, except that it returns names based on history records, not calendar data.

&User   Outputs the user name of the currently logged in user.

&FullName   Returns the full name of the currently logged in user, as defined in
                     File | Configure GoldMine | Users File.

&Licensee   Outputs the "Licensed To:" company name as defined when
                     the GoldMine serial number was specified.

&Sort1   Outputs the data from the field set as the primary sort for the
                     report. Can also be used to specify a break field within a sort
                     header.
                     For example, if the primary sort of a report is set to contact1-
                     >company and I insert the value of &Sort1 for the break field in
                     the sort header, the report will then break on contact1->company.

&Sort2   Outputs the data from the field set as the secondary sort for the
                     report. Can also be used to specify a break field in the same
                     manner as the &Sort1 value.

&Sort3   Outputs the data from the field set as the tertiary sort for the report.
                     Can also be used to specify a break field in the same manner as the
                     &Sort1 value.

&Phones   Outputs all three of the phone numbers, the fax number, and the
                     extension fields.

&LocalLabel: Returns the local label of the field specified after the colon.

&Suppfile="xxx"   Used to specify break fields and filters within sections of reports.
                     The "xxx" value must be at least two characters, but no greater
                     than three. It is used to specify the database and record types you
                     wish to include in a report section. The first two characters specify
                     the database and the third specifies the rectype within that
                     database.   Possible values for the different databases are as
                     follows: cs = contsupp.dbf, ca = calendar.dbf, ch = conthist.dbf.
                     The different rectypes that can be specified as the third character
                     are listed in the "Database Structures" section of your manual.

<u>Calendar Printouts Section Only</u>

&Detail1   Displays the information which has been specified in the "Options" window for the report.

&Year   Returns the value of the current year in four digit format, such as 1998. The macro will also return the value of the year for all dates within the specified date range under the report's options.
For example, if the date range is set as 01/01/95 to 01/31/97, the macro will return all values that fall within the date range (i.e. 1995, 1996, and 1997).

&Month   Returns the numeric equivalent of the current month. For example, January = 1, February = 2, etc.
The macro also returns the value of the month for all dates within the specified date range in the report's options.
For example, if the date range is set as 10/01/96 to 01/31/97, the macro will return all values that fall within the date range (i.e. 10, 11, 12 and 1).

&CMonth   Returns the name of the current month (For Example, January, February, etc.). The macro will also return the value of the month for all dates within the specified date range under the report's options.
For example, if the date range is set as 10/01/96 to 01/31/97, the macro will return all values that fall within the date range (i.e. October, November, December and January).

&CMonthYr   Returns the name of the current month, plus the 4 digit year (For example: January 1998).
The macro will also return the value of the month and year for all dates within the specified date range in the report's options.
For example, if the date range is set as 11/01/96 to 01/31/97, the macro will return all values that fall within the date range (i.e. November 1996, December 1996, and January 1997).

&Day   Returns the numeric value of the current day (For example, 12, 100, 300, etc.). The macro will also return the value of the day for all dates within the specified date range under the report's options.
For example, if the date range is set as 01/29/97 to 01/31/97, the macro will return all values that fall within the date range (i.e. 29, 30, and 31).

&Dow   Returns the numeric value of the day of the week. For example, a date which falls on Wednesday would return a value of 4, etc. Sunday is considered as being the 1st day of the week.
This macro will also return all values within a date range.

&CDow   Functions much in the same manner as the &Dow macro, except that instead of returning a numeric value, it returns the actual name of the day.
For example, if a date falls on a Sunday, the macro will return the value "Sunday" and so forth.

&DayNo   Returns the day number based on the year. For Example: January 2, 1997 = Day 2.

&WeekNo   Returns the week number of the year, similar to &DayNo. Jan 5–11 = Week 2

&WDay1   Returns the numeric day value of the Monday for the work week in which the date falls.
Assume that we are looking at records that fall on Wednesday January 29, 1997, the value returned by the macro would be 27. , Since the 29th is a Wednesday, Monday is the 27th for the week of January 29, 1997.

&WDay3   Functions in the same manner as the macro &Wday1, except that it returns the numeric day value of the third work day of the week, or Wednesday.

&WDay4   Functions in the same manner as the macro &Wday1, except that it returns the numeric day value of the fourth work day of the week, or Thursday.

&WDay7   Functions in the same manner as the macro &Wday1, except that it returns the numeric value of the seventh work day of the week, or Sunday.

&Hour   Displays the time in hourly increments from 7:00 am to 7:00 pm, generated in 12 hour format.

&Time   Returns the scheduled time for calendar records, in 12 hour format.

&FrDate   Displays the "From:" date entry from the report's options.

&ToDate   Displays the "To:" date entry from the report's options.

&LastMonth   Generates a graphical representation of the prior month, based on the date of the calendar records on the current report page. For example, if my report is displaying items for the month of January, the macro will print the graphical month of "December".

&ThisMonth   Generates a graphical representation of the current month, based on the date of the calendar records on the current report page.
For example, if my report is displaying items for the month of January, the macro will print the graphical month of "January."

&NextMonth   Generates a graphical representation of the next month, based on the date of the calendar records on the current report page. For example, if my report is displaying items for the month of January, the macro will print the graphical month of "February."

Helpful Tables

A feature of GoldMine is to assign colors to your calendar activities, which then carry over to the history activities. In the Calendar database, the color code is stored in the 10th position of the ApptUser field. For the history database, the color code is in the 5th position of the RecType field. If a user would like to see the color codes, this can be accomplished by writing expressions that output the name of the color.

An example of an expression for the calendar database would be:

.if.mid(cal->apptuser,10)="/".then."Black"

For the history database an example would be:

.if.left(mid(conthist->rectype,5),1)="/".then."Black"

The following is a complete list of all the color codes:

Color (In order of appearance)	Character	
Blue	Blank	
Magenta	!	
Red	"	(Note: May change to @)
Cyan	#	
Light Green	$	
Yellow	%	
Blue/Green	&	
White	'	
Grey	(	
Burnt Brown	)	
Dark Green	*	
Dark Yellow	+	
Dark Blue	,	
Dark Pink	-	
Dark Grey	.	
Black	/	

Record Types

Suppose a report was needed to print only the contacts which have lost sales in their history. Furthermore, the report should only print the lost sale history records. A report filter using the following expression, would limit the report to only those such contacts and history records.

Left(ContHist->RecType,3)="S U"

The following tables list all of the scheduled and completed record types of interest.

Calendar:

Activity Name	RecType	Special Info
Call	C	
Next Action	T	
Appointment	A	
Forecasted Sale	S	
Other Action	O	
To-Do	D	
Event	E	
GoldMine E-Mail	M	
Internet E-Mail	M	CREATEBY=INTERNET
Phone Message	C	

History:

Activity Name	RecType
Scheduled Call (Successful)	CC
Scheduled Call (Unsuccessful)	CCU
Returned Message (Successful)	CM
Returned Message (Unsuccessful)	CMU
Outgoing Call (Successful)	CO
Outgoing Call (Unsuccessful)	COU
Incoming Call (Successful)	CI
Incoming Call (Unsuccessful)	CIU
Next Action (Successful)	T
Next Action (Unsuccessful)	T U
Appointment (Successful)	A
Appointment (Unsuccessful)	A U
Other Action (Successful)	O
Other Action (Unsuccessful)	O U
Sale (Successful)	S
Sale (Unsuccessful)	S U

Hints & Tips

This section of the documentation discusses some of the special tricks which may be used to achieve your desired results with a minimum of effort. A scenario will be outlined and a possible solution using some of these hints will described. The goal is to provide as much information which may be of assistance.

Scenario 1:

Client requires that several lines of text be inserted onto a report layout. Perhaps a small one paragraph description about their company or something similar.

Free text can easily be inserted by using labels. However, a label would need to be created for each line of text which composes the paragraph., as was discussed earlier when describing labels.

Suggestion:

Insert an expression field with any arbitrary name. Remember that expression fields are basic xBase expressions, which allow the insertion of free text, as long as the text is within quotes. Doing so would only require the insertion of one field, as opposed to inserting one field per line of text. An additional advantage of using the expression field to perform the task is that the wrap text and other corresponding options will become available, unlike a label.

Pictured below is a screen shot of how to create an expression field of this type.
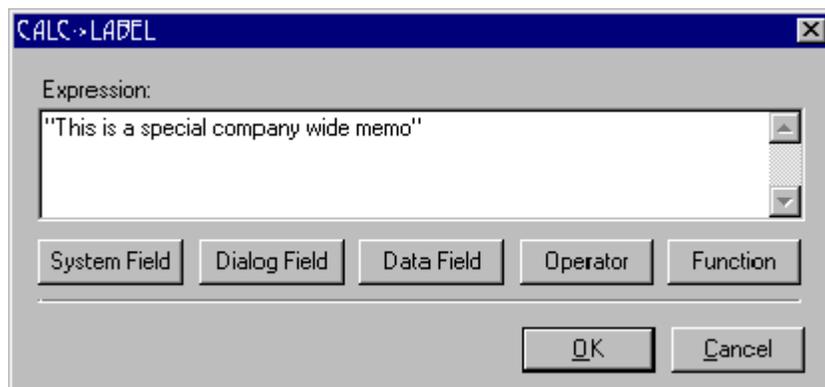
Note that at this time, it is only possible to enclose up to 48 characters in a single pair of quotes. This means that using a single expression field, the following output could be generated:

The Widet and Gadget Company
wishes you and your family,
a safe and happy holiday.

However, due to the 48 character limit, the following could not be printed with an expression field without a special trick:

The Widet and Gadget Company wishes you and your family, a safe and happy holiday.

The trick to printing a continuous line of text across the page with an expression field, is to break up the text into individual segments, each no longer than 48 characters. The following is an example of such an expression:

"The Widet and Gadget Company wishes"+" you and your family, a safe and"+" happy holiday."

Since this sentence is longer than one line, this field would need to have "Word Wrap Text" and Variable Number of Lines" checked on its field properties screen.

Scenario 2:

Suppose it is necessary to print a report that displays the department field information next to the contact information. Examining the available macros will reveal that none of the existing macros can be used, since they do not include the fields we want to print. The first inclination to solving the problem would be to insert both fields next to each other on the report layout.

The logic behind the solution is good, however it will not function very well for the following reason: The department field is 30 characters in length and the contact field is 40 characters in length, the person designing the report can not possibly predict how much space will be needed between the contact name and the department. If the fields were placed alongside each other on the layout, there would be a large space between the fields, which depends upon the length of the contact name. The following results will be observed when the report is printed:

John Smith   Shipping and Receiving

Any contact that has a contact field value of forty characters would appear to print normally, except for the fact that there is a large space between the department text and the contact text. A simple solution to the problem would be to move the department field slightly to the left, closing the gap between the two fields. This solution would work fine, if all the contacts had names that were exactly the same length.

Since everyone does not have the same number of characters in their name, the following solution should be used.

Suggestion:

Concatenating the two fields is the best solution for this scenario, since it is unlikely that all contacts in the database will have a contact name of equal length. Expression fields like the one displayed above, can be used to accomplish the task.

Notice that a space has been inserted between the two fields and the "trim" function is used to remove empty spaces after the contact name.
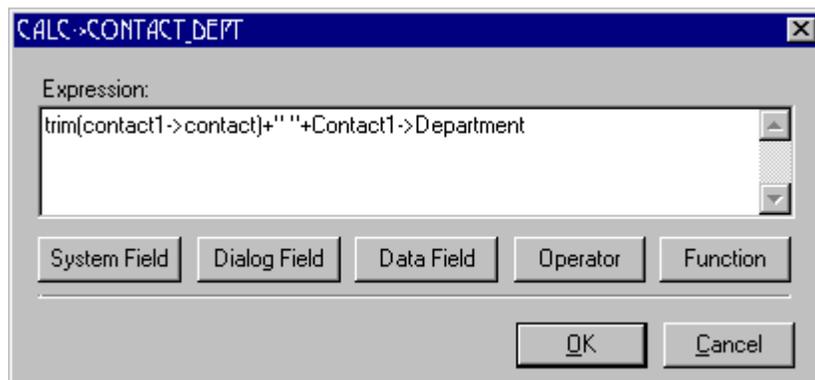
Scenario 3:

The report being created generates a list of all scheduled activities. The output of the report is correct, in that all pending activities are displayed. However, in addition to fields from the cal database, fields from the contact1 database have been inserted on the report layout. Suppose this installation of GoldMine has multiple contact files, there is an issue that arises when the report is printed.

Since the cal database file is shared among the different contact files, when the report is printed, it will generate the pending information pertaining to all the different contact files used by GoldMine. For example, should the report be generated while database A is open, it will also display calendar data corresponding to database B. GoldMine does not have the ability to generate contact information not pertaining to the currently open contact file. Therefore, all of the contact1 database fields on the layout, will most likely appear blank on the report. This is more of an eye sore than anything else, since the calendar data will most likely be correct.

A good solution would be to only generate the calendar data corresponding to the currently open contact file. However, the report engine does not provide an option to perform this task directly. In the case of the above note, if the report should only print a contact if the contact contains calendar, history, or a special profile, then the following solution should be used.

Suggestion:

A report filter could be used to accomplish this task. To access the report settings through the layout local menu, click the secondary mouse button and select Report Settings | Filter. The following expression can be used to accomplish the desired results:

$$\text{cal->accountno = contact1->accountno}$$

The first expression works by comparing the record in the calendar database to all records in the currently open contact database. If the accountno does not match, the calendar activity is not printed.

There are three reasons why the accountno would not match:
1. The record does not belong to the contact currently being considered.
2. The calendar activity does not belong to a contact in this database.
3. The calendar record is an unlinked activity.

Note: This same solution could also be applied if the report should only print contacts with calendar information. Furthermore, the solution can be extended to any report where it should print a contact only if that contact contains the desired information, in this case calendar information, but it could also be history or a particular profile of interest.

For example, in the case of a specific profile, the following expression could be used:

left(upper(contsupp->contact),8) = "COMPUTER"

Since the name of a profile is kept in the contsupp->contact field, the expression will limit the report to only those contacts which have a profile called Computer. There are two tricks used in the profile filter, the first is the left and the second is the upper function. The left function is used to only compare the first 8 characters of the profile name, the upper function is used to convert the profile name to uppercase so that the case of the profiles does not matter. Since the "upper" function was used, notice the name of the profile is also in uppercase characters.

Scenario 4:

Blank line suppression can be difficult. True blank line suppression can only be achieved through the use of macros, however an expression field may be used to create your own macro. Suppose a contact listing report is printed which includes each contact's address. Assume that 90% of the contacts in the database contain an address2 field value. The report would look its best if a blank line was not generated every time a contact without an address2 value is encountered. Inserting a macro such as &NameAddress would eliminate this problem by generating the contact's address, but at the same time, suppressing any blank fields.

However, many times end-users wish to customize the macro to suit their needs. Macros cannot be customized. Thus, if a macro does not contain the exact data and format desired, blank lines become a concern.

Suggestion:

Expression fields, together with "if" statements can be used to create a simulated macro. However, this workaround is best used when there are only two fields involved that need to be suppressed. In this case, the address1 field and address2 field, where the address2 field can either be blank or contain a value.

Blank line suppression of more than two fields is possible but requires the layering of multiple expression fields directly on top of each other, or using expression fields to print a field only if certain conditions exist.

Assume the address2 field and the &citystatezip macro are inserted one over the other in an attempt to suppress the blank lines. Since most people have a street address and a city, state, and zip, the fields will overlap each other.

By using expression fields which only print a field if a value is present, multiple fields can be inserted over one another to accomplish the blank line suppression.

The following expression fields should be inserted to suppress a possible blank address2 line.
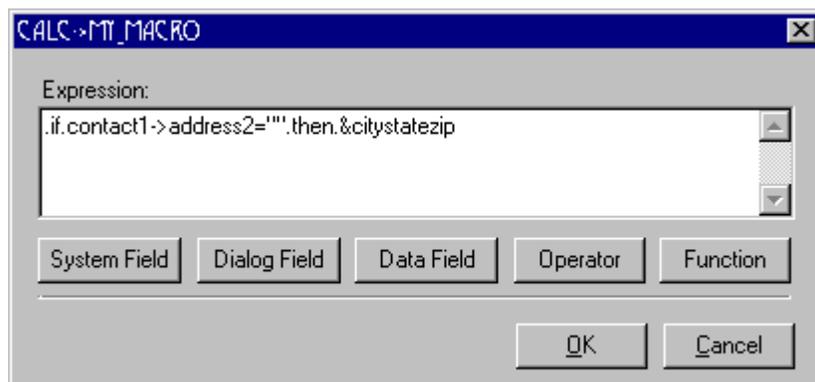
This first expression will print the &CityStateZip macro should the address2 line be blank.

The second field would be configured as displayed below.
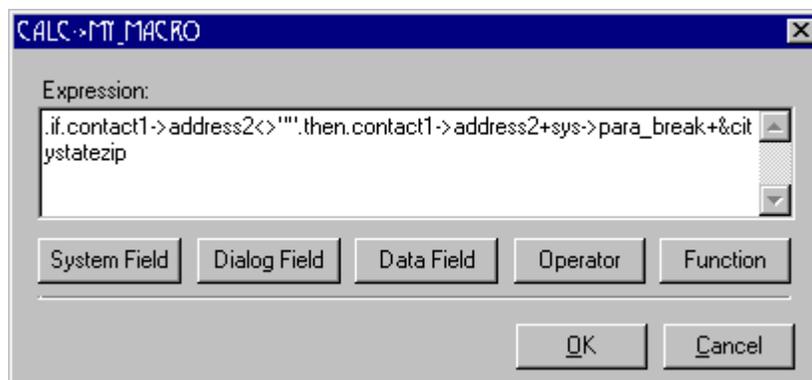
This second expression will generate the address2 and &CityStateZip, if the address2 field does contain a value. Since this expression uses the paragraph break system field, the field properties would need to be set for "Word Wrap Text" and "Variable Number of Lines".

In this case, a more complex expression could have been written in just one expression field, however the example is meant to illustrate the use of multiple overlapping fields in which only one of those fields will print. This is true since our first expression performs an action if the address2 field is empty, while the second field performs an action if the field is not empty. Since the field can not be empty and contain data at the same time, only one will be true and thus print data.

The following expression could be used to accomplish the same result with only one expression field:

.if.contact1->address2="".then.&CityStateZip.else.contact1->address2+sys->para_break+&CityStateZip

Again, since the paragraph break system field is used, the "Word Wrap Text" and "Variable Number of Lines" options would need to be checked in the field properties window.

The first condition checks for an empty address2 field, if it is empty, it will print only the City, State, and Zip. The "else" portion will print if the address2 field is not empty. Notice the use of the paragraph break feature discussed earlier in this document. This will allow the City, State, and Zip to print on the line following the address2 field.

An example of how the fields should be inserted is displayed below. In addition, an example of both results is displayed to the right of the field names.

Field Names:	Output with Address2 Value:	Without Address2:
Company Name	Widget and Gadget Company	Widget and Gadget Company
Contact Name	John Smith	John Smith
Address1	1000 Main St.	1000 Main St.
Expression 1 & 2	Suite 100	Jacksonville, PA 55555
	Jacksonville, PA 55555	<<Blank>>

The main advantage of using individual fields, as opposed to macros, is that individual fields can be configured independently. Suppose the company name needed to be printed in uppercase, yet still generate the other fields in their proper case, the company field can be modified to accomplish this using its field properties window. However, if a macro were used, any modifications to the text formatting, would affect all of the data generated by the macro. Formatting of individual lines within a macro is not possible.

Scenario 5:

Suppose we print a generic contact report which details not only main contact information, but also the history associated with the contact. Now, assume that the database contains 100,000 records, some of which have numerous history records.

The only options for the contact range are current, all or filter or group. If I want to see the history for all my contacts, I would select the "all" option and print the report. However, considering the database has 100,000 records, but only about 30% of those contacts actually have history, why waste all the time and paper to generate the data if only a small percentage of the contacts actually have any history?

The best way to generate the report would be to instruct the report writer to only print those contacts that have history records attached. However, there are no built in options which permit this type of restriction. There are two methods for accomplishing this task.

Suggestion:

The first solution is to use two sort headers and one detail section, then as discussed in a different scenario, use the following report filter:

conthist->accountno = contact1->accountno

This will limit the report to only contact which have history by comparing the history records accountno field with the accountno field in the contact1 database. The purpose of the sort1 header would be to break on contact1->accountno and to print the company, contact, address, phone, etc. The second sort header would break on conthist->accountno or the &suppfile="ch" macro. As discussed earlier, the sort1 header breaking on contact1 allows the report writer to use the "Current" contact selection on the main report screen, without which the report writer would not be able to link the current contact with the history data being printed in the report.

The second solution is to use only one sort header and one detail section. The sort1 header would break on conthist->accountno only, the &suppfile macro can not be used since there is no sort1 header breaking on contact1 in this case. The &suppfile macro is meant to link multiple one-to-many databases together in the same report, for example, printing contact name, calendar, history, and profiles.

By using only one sort header breaking on conthist->accountno, the report can only print data from the history database and thus only print contacts which have history. This is true since a contact which has no history, would have no records in the history database. The only exception being that the macros can be used to print contact information correctly. The macros would be placed in the Sort1 header along with the column headers for the history data.

There is an exception to only placing the macros, such as &name&address, in the Sort1 header. The default History Wide Line report demonstrates the use of the macros within the detail section itself. This is because the Sort1 break field is set to conthist->user instead of conthist->accountno. Since a break field of conthist->accountno will group the history by its unique identifier, the accountno field, it will print all of the history for one contact before moving to the next contact. This is what allows the macros for the company name, contact name, etc., to be placed in the Sort1 header.

However, since the History Wide Line report uses the Sort1 break field of conthist->user, the history records will be grouped together based upon the user who completed the activities. This means they could be from many different contacts, thus the macros for company name , contact name, etc. should be included in the detail section so as to identify which contact each history activity belongs.

Note: Since there is no sort1 header breaking on the contact1 database in the second solution, the report has no way to link the current contact with the history. So in this case, selecting the "Current" contact selection from the main report screen, will either cause the same history record to print multiple times or cause only one history record to print. In addition, the record(s) that do print, may or may not be associated with the current contact.

As mentioned earlier, these same tactics can be applied to reports that print contsupp or calendar data. Note that if the report prints data from multiple databases, such as pending and history, neither solution will not work. However, the first solution can work with a slight modification. Suppose the report should print only contacts with pending and history, instead of using a report filter such as cal->accountno = contact1->accountno, the following filter could be used:

cal->accountno = contact1->accountno .or. conthist->accountno = contact1->accountno

In this manner, the report will print contacts which have calendar information, or history information, or both. It can be taken one step further by changing the ".or." to an ".and.", this would limit the report to contacts which have both calendar and history records.

Scenario 6:

When and where should the "Variable Number of Lines" option be used? As discussed earlier, the variable number of lines option allows a field to wrap over as many lines as needed to print the field. The exception being until it reaches the end of a page, the only way to print past the end of the page is if the field is within a Detail 1 section.

When the variable number of lines box is checked, the size of the field on the report layout does not have an effect on the number of lines printed. For example, if you drag the field box to be two lines high, it will still print more lines if the data needs more than two lines to print. If this option is unchecked and only the "Word Wrap Text" option is checked, the text will only wrap to as many lines as is allowed by the size of the field on the layout. Meaning, if the height of the field box allows enough room for only two lines, the report will only print the first two lines.

Suggestion:

The variable number of lines option is a useful feature, particularly for reports that should only be a certain size in terms of height. Such reports would be label reports or day planner style reports, where the size of the printed output must always be a certain height in order to fit the template forms upon which they are printed. By selecting only the "Word Wrap Text" box on the field properties window and sizing the field to a maximum size, the output of the report will always print the field in the same amount of space. This technique can be seen in may of the default day planner style reports.

Scenario 7:

Only certain additional contacts should be printed in an additional contact or label report.

Suggestion:

Printing only certain additional contacts is a feature of GoldMine 4, this is accomplished by placing a code in the "Mail Merge/Codes" field on the additional contact's properties screen. The merge code can be up to nineteen characters, while the field is twenty characters, the first character is reserved for specifying whether or not the merge code is active. A merge code is active when a check mark has been placed next to the "Mail Merge/Codes" field.

GoldMine keeps track of this first character position for the user, therefore there is no need to type a space and then the merge code. A merge code can be any combination of characters and numbers.

Generally, when using an additional contact report, the main contact should only be printed if it has any additional contacts with a matching merge code. To accomplish this task, place the following report filter in the layout.

<p align="center">contsupp->mergecodes = " Arizona"</p>

There are a few key elements of importance about this filter. Notice that **contact1->accountno = contsupp->accountno** is not part of the filter. This is a common mistake in this case, since our filter already restricts certain contsupp records, there is no need to compare the accountno fields from contact1 to contsupp. The reasoning behind this filter is that the contact1 record can not be printed if it does not have a contssupp record meeting the filter criteria. To help illustrate this point, take for example 10 contacts in a database which have additional contacts, now assume that two of these contacts have additional contacts with the merge code "Arizona". Using the filter, the only contacts which will pass the filter's requirements are the contacts with additional contacts using the merge code "Arizona". Furthermore, any additional contacts which do not use the merge code "Arizona" will not be printed.

Notice the filter has a space before the merge code contained within the quotes. This space is necessary, since the first character is used to designate whether or not to use the merge code. When the merge code is active, the first character will be a space, when the merge code is inactive, it will be any character other than a space.

When printing labels and envelopes, the expression is the same.

<p align="center">contsupp->mergecodes = " Arizona"</p>

Remember, to add a report filter, click the secondary mouse button anywhere on the report layout and choose Report Settings | Filter. A report filter applies to the entire report, while a section filter will only apply to that particular section.

GoldMine 4 Reports Listing   Last Updated: July 16, 1998

This list was prepared by Tim Nash with assistance from Gary L. Brooks, Stephen Parks, and Angel Magaña.

If errors are found please Email nash@erinet.com.

Update files are available from the GoldMine Files library at:
http://www.goldminesw.com/html/files_library.htm .

- Black files are from an installation of v3.x and all are updated with the GoldMine GM4REPS.EXE update. They are also updated during various uses of NetUpdate.
- **Bold Black files may need to be added to your Reports Menu.**
- Blue files are New or Modified v4.x Reports from the GM4REPS.EXE update, or from the use of NetUpdate, and require manual changes to Sorts and/or Options; or need to be added to your GoldMine Reports Menu window if you upgraded from v3.x.
- Green files are v3.x Reports that are not included with v4.x – at least not as the same filename.
- Gray files are v3.x Reports from the 95REPS.EXE file only.
- Dark Red files are Reports included in v4.x with a pristine installation (not over the top of an old version of GoldMine). (See Factsback #504)
- **Bold Dark Red files are Reports included in v4.x that do not have a comparable Report in v3.x. They may be added with the use of NetUpdate.**
- Red text is comments about filename changes or replacement file information. Note: If a GoldMine Reports update file is referenced, it refers to where the file came from prior to the GoldMine GM4REPS.EXE updates or a NetUpdate being applied.

The list below is sorted by Report Category then by Description, files without a description are unsued reports.

| Original Report (also Supplemental Information) [1] | | | Default – Sort: Database->Field |
FileName	Description	Category	Options:
comp2nf.fp			
conta005.fp			
conta006.fp			
contl000.fp			
default.fp			
default.fp			
lenxt000.fp			
lenxt001.fp			
letaskrp.fp			
readme.fp			
smpcas.fp			
lexprof.fp	Expanded Profile Report	*Contact	From 95REPS.EXE GoldMine update. Sort by Contsupp->Rectype
slsforcs.fp	Sales Forecast Report By User	*Analysis	**Use other Forecasted Sales reports.** From 95REPS.EXE GoldMine update.
activity.fp	Activity Listing	*Calendar	
proflist.fp	Profiles Report	*Contact	Sort: Contact1->Contact. Options: All checked. Referenced in the GoldMine 95REPS.EXE update, but actual report not included in the update.

compsale.fp	Completed Sales by User	Analysis	Sort: ContHist->Userid, ContHist->Rectype S to S, Ondate. Options: n/a. From 95REPS.EXE GoldMine update.
compsale.fp	Completed Sales by User	Analysis	Sort: ContHist->Userid, ContHist->Rectype S to Sz, ContHist->Ondate. Options: All checked.
smpcsum.fp	Completed Sales by User per Month	Analysis	Sort: ContHist->Ondate, ContHist->Rectype S to S, ContHist->Userid. Options: n/a.
smpcsum.fp	Completed Sales by User per Month	Analysis	Sort: ContHist->Ondate, ContHist->Rectype S to Sz, ContHist->Userid. Options: All checked.
conta003.fp	Completed Sales by User per Month (2)	Analysis	Sort: ContHist->Userid, ContHist->Ondate, ContHist->Rectype S to S. Options: n/a.
conta003.fp	Completed Sales by User per Month (2)	Analysis	Sort: ContHist->Userid, ContHist->Ondate, ContHist->Rectype S to S. Options: All checked.
smpfsru.fp	Forecasted Sales by User	Analysis	Sort: Cal->Userid, Cal->Ondate. Options: Only Sales checked.
smpfsru.fp	Forecasted Sales by User	Analysis	Sort: Cal->Userid, Cal->Ondate. Options: History Data All checked, Calendar Data only Forecast Sales checked.
smpsfse.fp[c]	Forecasted Sales by User (2)	Analysis	Sort: Cal->Userid, Cal->Ondate. Options: Only Sales checked. Final "C" in filename can be deleted so that it shows after clicking the browse (…) button in GM Report Profile window.
smpsfse.fp[c]	Forecasted Sales by User (2)	Analysis	Sort: Cal->Userid, Cal->Ondate. Options: History Data All checked, Calendar Data only Forecast Sales checked. Final "C" in filename can be deleted so that it shows after clicking the browse (…) button in GM Report Profile window.
smpfsum.fp	Forecasted Sales by User per Month	Analysis	Sort: Cal->Ondate, Cal->Userid. Options: Only Sales checked.
smpfsum.fp	Forecasted Sales by User per Month	Analysis	Sort: Cal->Ondate, Cal->Userid. Options: History Data All checked. Calendar Data only Forecast Sales checked.
smpsfum.fp	Forecasted Sales by User per Month (2)	Analysis	Sort: Cal->Ondate, Cal->Userid. Options: Only Sales checked.
smpsfum.fp	Forecasted Sales by User per Month (2)	Analysis	Sort: Cal->Ondate, Cal->Userid. Options: History Data All checked, Calendar Data only Forecast Sales checked.
smpfsfcd.fp	**Forecasted Sales Funnel by Cycle (detail)**	**Analysis**	Sort: Cal->Duration. Options: History Data All checked, Calendar Data only Forecast Sales checked.
smpfsfms.fp	**Forecasted Sales Funnel by Month(Yearly)**	**Analysis**	Sort: Cal->Ondate. Options: History Data All checked, Calendar Data only Forecast Sales checked.
smpsffl.fp	Forecasted Sales Funnel by User	Analysis	Sort: Cal->Userid. Options: Only Sales checked.

smpsffl.fp	Forecasted Sales Funnel by User	Analysis	Sort: Cal->Userid. Options: History Data All checked, Calendar Data only Forecast Sales checked.
smpsffl2.fp	Forecasted Sales Funnel by User (detail)	Analysis	Sort: Cal->Userid, Cal->Duration. Options: History Data All checked, Calendar Data only Forecast Sales checked.
smpsffl2.fp	Forecasted Sales Funnel by User (detailed)	Analysis	Sort: Cal->Userid. Options: Only Sales checked.
smpo&p.fp	Opportunity Manager: Opportunities	Analysis	Sort: OpMgr->Opid, OpMgr->Rectype. Options: n/a.
smpo&p.fp	Opportunity Manager: Opportunities	Analysis	Sort: OpMgr->Opid, OpMgr->Rectype. Options: All checked.
smpo&p2.fp	Opportunity Manager: Projects	Analysis	Sort: OpMgr->Opid, OpMgr->Rectype. Options: n/a.
smpo&p2.fp	Opportunity Manager: Projects	Analysis	Sort: OpMgr->Opid, OpMgr->Rectype. Options: All checked.
conta001.fp	Phone Calls Log	Analysis	Should be the same as red version.
conta001.fp	Phone Calls Log	Analysis	Sort: ContHist->Userid, ContHist->Ondate, ContHist->Rectype C to Cz. Options: All checked.
conta002.fp	Phone Calls Statistics	Analysis	Should be the same as red version.
conta002.fp	Phone Calls Statistics	Analysis	Sort: ContHist->Userid, ContHist->Ondate, ContHist->Rectype C to Cz. Options: All checked.
smpactan.fp	Scheduled Activities Analysis	Analysis	Should be the same as red version.
smpactan.fp	Scheduled Activities Analysis	Analysis	Sort: Cal->Userid &user to &user. Options: All checked.
c1.fp	*Calendar Default Report	Calendar	Options: Weekly selected, Include Activities only Call Backs & Next Actions & Others & Events checked, Detail Text All checked.
c1fp002.fp	12 Hour Appointment List	Calendar	**Name change. See "Daily Appointment List."** From NEW95REP.EXE GoldMine update.
c1.fp	A Calendar Default Report	Calendar	See "*Calendar Default Report." Should be the same as red version.
lemonth.fp	Activities Monthly	Calendar	Should be the same as red version. Referenced in the GoldMine 95REPS.EXE update, but actual report not included in the update.
lemonth.fp	Activities Monthly	Calendar	Options: Monthly selected, All checked.
c1fp000.fp	Appointment List	Calendar	n/a. From GM4REPS.EXE readme, it has been replaced with SMPWALST.FP which is in GM4REPS.EXE. **Print report to window to see if it is still installed. If not, delete report.**
caldv.fp	Daily – DayTimer (detailed)	Calendar	Should be the same as red version.
caldv.fp	Daily – DayTimer (detailed)	Calendar	Options: Daily (variable) selected, All checked.
caldf.fp	Daily – DayTimer (summary)	Calendar	Should be the same as red version.
caldf.fp	Daily – DayTimer (summary)	Calendar	Options: Daily (variable) selected, All checked.
c1fp002.fp	Daily Appointment List	Calendar	Options: Daily (variable) selected, All checked.
calmv.fp	Monthly – DayTimer	Calendar	Should be the same as red version.
calmv.fp	Monthly – DayTimer	Calendar	Options: Monthly selected, All checked.

calwl000.fp	Weekly – DayTimer (portrait)	Calendar	Should be the same as red version. From 95REPS.EXE GoldMine update.
calwl000.fp	Weekly – DayTimer (portrait)	Calendar	Options: Weekly selected, All checked.
calwl.fp	Weekly – DayTimer *Avery 41357	Calendar	Options: Weekly selected, All checked.
calwl.fp	Weekly – DayTimer *Avery 41357	Calendar	Should be the same as red version. From 95REPS.EXE GoldMine update.
smpwalst.fp	Weekly Appointment List (portrait)	Calendar	Sort: n/a. Options: Weekly and only Appointments checked.
smpwalst.fp	Weekly Appointment List (portrait)	Calendar	Options: Weekly selected, Include Activity only Appointments checked, Detail Text All checked.
leaddrph.fp	Address & Phone	Contact	Should be the same as red version.
leaddrph.fp	Address & Phone	Contact	Sort: Contact1->Company, Contact1->Contact. Options: All checked.
leapptls.fp	Appointments List	Contact	Should be the same as red version.
leapptls.fp	Appointments List	Contact	Sort: Cal->Userid &user to &user, Cal->Ondate. Options: History Data only To-dos checked, Calendar Data only Appointments checked.
lecallbk.fp	Call Backs List	Contact	Should be the same as red version. From 95REPS.EXE GoldMine update.
lecallbk.fp	Call Backs List	Contact	Sort: Cal->Userid &user to &user, Cal->Ondate. Options: All checked.
lecmphst.fp	Completed Activity List	Contact	Should be the same as red version.
lecmphst.fp	Completed Activity List	Contact	Sort: Contact1->Company. Options: All checked.
lecomhst.fp	Contact History Report	Contact	Should be the same as red version. From 95REPS.EXE GoldMine update.
lecomhst.fp	Contact History Report with Notes	Contact	Sort: Contact1->Accountno. Options: All checked.
smpcontp.fp	Contact Info (Top Half of Screen)	Contact	Should be the same as red version.
smpcontp.fp	Contact Info (Top Half of Screen)	Contact	Sort: Contact1->Company. Options: All checked.
contline.fp	Contact Line Report – Landscape	Contact	Should be the same as red version.
contline.fp	Contact Line Report – Landscape	Contact	Sort: Contact1->Company. Options: All checked.
contprof.fp	Contact Profile (Detailed)	Contact	Should be the same as red version.
contprof.fp	Contact Profile (Detailed)	Contact	Sort: Contact1->Company. Options: All checked.
lekeyusr.fp	Contacts with Key & UserDef Fields	Contact	Should be the same as red version. Referenced in the GoldMine 95REPS.EXE update, but actual report not included in the update.
lekeyusr.fp	Contacts with Key & UserDef Fields	Contact	Sort: Contact1->Accountno. Options: All checked.
smpnt.fp	Contacts with Notes Tab	Contact	Should be the same as red version. From 95REPS.EXE GoldMine update.
smpnt.fp	Contacts with Notes Tab	Contact	Sort: Contact1->Company. Options: All checked.
smppt.fp	Contacts with Profile Tab	Contact	Should be the same as red version.
smppt.fp	Contacts with Profile Tab	Contact	Sort: Contact1->Company. Options: All checked.

wwdir.fp	Directory of Primary and Other Contacts	Contact	Should be the same as red version.
wwdir.fp	Directory of Primary and Other Contacts	Contact	Sort: ContSupp->Accountno, ContSupp->Rectype C to C, ContSup->Contact. Options: All checked.
lefutact.fp	Future Activity Report	Contact	Should be the same as red version. Referenced in the GoldMine 95REPS.EXE update, but actual report not included in the update.
smph&pts.fp	History & Pending Report	Contact	Should be the same as red version. From 95REPS.EXE GoldMine update.
smph&pts.fp	History & Pending Report	Contact	Sort: Contact1->Contact. Options: All checked.
histref.fp	History & Referrals Report	Contact	Should be the same as red version.
histref.fp	History & Referrals Report	Contact	See Notes in Report Profile (Properties button).
histline.fp	History Wide Line Report	Contact	Should be the same as red version.
histline.fp	History Wide Line Report	Contact	Sort: ContHist->Userid. Options: All checked.
intadd.fp	**Internet Address Report**	**Contact**	Should be the same as red version. From NEW95REP.EXE GoldMine update.
intadd.fp	Internet Address Report	Contact	Sort: ContSupp->Accountno. Options: All checked.
lelink.fp	Linked Documents	Contact	Should be the same as red version.
lelink.fp	Linked Documents	Contact	Sort: ContSupp->Accountno, ContSupp->Rectype L to L, ContSupp->Contsupref. Options: All checked.
smpml2.fp	Message List	Contact	Should be the same as red version.
smpml2.fp	Message List	Contact	Sort: Cal->Userid, Cal->Ondate. Options: All checked.
lemessag.fp	Messages List	Contact	Replaced with SMPML2.FP which is in GM4REPS.EXE. **Change the filename this report references. You can then delete lemessag.fp**
smpnal2.fp	Next Actions List	Contact	Should be the same as red version.
smpnal2.fp	Next Actions List	Contact	Sort: Cal->Userid, Cal->Ondate. Options: All checked.
orgtree.fp	Organizational Tree	Contact	Should be the same as red version.
orgtree.fp	Organizational Tree	Contact	Sort: ContSupp->Contsupref, ContSupp->Rectype O to O, Contact1->Accountno. Options: All checked.
oclist.fp	Other Contacts Listing	Contact	Should be the same as red version.
oclist.fp	Other Contacts Listing	Contact	Sort: ContSupp->Accountno, ContSupp->Rectype C to C, ContSupp->Contact. Options: All checked.
lefutact.fp	Pending Activity Report	Contact	Sort: Contact1->Contact. Options: All checked.
smppwlr.fp	Pending Wide Line Report	Contact	Sort: Cal->Userid, Contact->Company. Options: n/a.
smppwlr.fp	Pending Wide Line Report	Contact	Sort: Cal->Userid, Contact1->Company. Options: All checked.
fonelist.fp	Phone Book	Contact	Should be the same as red version. Referenced in the GoldMine 95REPS.EXE update, but actual report not included in the update.

fonelist.fp	Phone Book	Contact	Sort: Contact1->Lastname. Options: All checked.
foneoth.fp	Phone Book (Primary & Additional)	Contact	Should be the same as red version.
foneoth.fp	Phone Book (Primary & Additional)	Contact	Sort: Contact1->Company. Options: All checked.
fonebus.fp	Phone Book Bus.Card Style	Contact	Should be the same as red version.
fonebus.fp	Phone Book Business Card Style	Contact	Sort: Contact1->Company. Options: All checked.
le4fones.fp	Phone1 & Fax Report – Landscape	Contact	Should be the same as red version. From 95REPS.EXE GoldMine update.
le4fones.fp	Phone1 & Fax Report – Landscape	Contact	Sort: Contact1->Company. Options: All checked.
smpdupch.fp	**Potential Duplicate Contact Report**	**Contact**	Sort: Contact1->Company. Options: All checked.
smptd.fp	To Do Listing	Contact	Sort: Cal->Userid. Options: Only Todo's checked in Calendar Section. From 95REPS.EXE GoldMine update.
smptd.fp	To Do Listing	Contact	Sort: Cal->Userid. Options: History Data All checked, Calendar Data only To-do's checked.
nf4143p.fp	Avery 4143 Primary Contacts	Lab&Env	Should be the same as red version. From 95REPS.EXE GoldMine update.
nf4143p.fp	Avery 4143 Primary Contacts	Lab&Env	Sorts: none. Options: All checked.
oth4143.fp	Avery 4143, Other Contacts	Lab&Env	Should be the same as red version.
oth4143.fp	Avery 4143, Other Contacts	Lab&Env	Sorts: none. Options: All checked.
nf4144p.fp	Avery 4144 Primary Contacts	Lab&Env	Should be the same as red version. From 95REPS.EXE GoldMine update.
nf4144p.fp	Avery 4144 Primary Contacts	Lab&Env	Sorts: none. Options: All checked.
oth4144.fp	Avery 4144, Other Contacts	Lab&Env	Should be the same as red version.
oth4144.fp	Avery 4144, Other Contacts	Lab&Env	Sorts: Contact1->Accountno. Options: All checked.
le5160pr.fp	Avery 5160 Primary Contacts	Lab&Env	Should be the same as red version. From 95REPS.EXE GoldMine update.
le5160pr.fp	Avery 5160 Primary Contacts	Lab&Env	Sorts: none. Options: All checked.
oth5160.fp	Avery 5160, Other Contacts	Lab&Env	Should be the same as red version. From NEWLABEL.EXE GoldMine update.
oth5160.fp	Avery 5160, Other Contacts	Lab&Env	Sorts: none. Options: All checked.
le5161pr.fp	Avery 5161 Primary Contacts	Lab&Env	Should be the same as red version. From 95REPS.EXE GoldMine update.
le5161pr.fp	Avery 5161 Primary Contacts	Lab&Env	Sorts: none. Options: All checked.
oth5161.fp	Avery 5161, Other Contacts	Lab&Env	Should be the same as red version.
oth5161.fp	Avery 5161, Other Contacts	Lab&Env	Sorts: none. Options: All checked.
le5162pr.fp	Avery 5162 Primary Contacts	Lab&Env	Should be the same as red version. From 95REPS.EXE GoldMine update.
le5162pr.fp	Avery 5162 Primary Contacts	Lab&Env	Sorts: none. Options: All checked.

oth5162.fp	Avery 5162, Other Contacts	Lab&Env	Should be the same as red version. From NEWLABEL.EXE GoldMine update.
oth5162.fp	Avery 5162, Other Contacts	Lab&Env	Sorts: none. Options: All checked.
le5163pr.fp	Avery 5163 Primary Contacts	Lab&Env	Should be the same as red version. From 95REPS.EXE GoldMine update.
le5163pr.fp	Avery 5163 Primary Contacts	Lab&Env	Sorts: none. Options: All checked.
oth5163.fp	Avery 5163, Other Contacts	Lab&Env	Should be the same as red version. From NEWLABEL.EXE GoldMine update.
oth5163.fp	Avery 5163, Other, Contacts	Lab&Env	Sorts: none. Options: All checked.
le5164pr.fp	Avery 5164 Primary Contacts	Lab&Env	Should be the same as red version. From 95REPS.EXE GoldMine update.
le5164pr.fp	Avery 5164 Primary Contacts	Lab&Env	Sorts: none. Options: All checked.
oth5164.fp	Avery 5164, Other Contacts	Lab&Env	Should be the same as red version.
oth5164.fp	Avery 5164, Other Contacts	Lab&Env	Sorts: none. Options: All checked.
av7160.fp	Avery 7160 Primary Contacts	Lab&Env	Should be the same as red version.
av7160.fp	Avery 7160 Primary Contacts	Lab&Env	Sorts: none. Options: All checked.
av7161.fp	Avery 7161 Primary Contacts	Lab&Env	Should be the same as red version.
av7161.fp	Avery 7161 Primary contacts	Lab&Env	Sorts: none. Options: All checked.
av7162.fp	Avery 7162 Primary Contacts	Lab&Env	Should be the same as red version.
av7162.fp	Avery 7162 Primary Contacts	Lab&Env	Sorts: none. Options: All checked.
av7163.fp	Avery 7163 Primary Contacts	Lab&Env	Should be the same as red version.
av7163.fp	Avery 7163 Primary Contacts	Lab&Env	Sorts: none. Options: All checked.
av7164.fp	Avery 7164 Primary Contacts	Lab&Env	Should be the same as red version.
av7164.fp	Avery 7164 Primary Contacts	Lab&Env	Sorts: none. Options: All checked.
av7165.fp	Avery 7165 Primary Contacts	Lab&Env	Should be the same as red version.
av7165.fp	Avery 7165 Primary Contacts	Lab&Env	Sorts: none. Options: All checked.
wwenv10.fp	Envelope #10	Lab&Env	Should be the same as red version. From 95REPS.EXE GoldMine update.
wwenv10.fp	Envelope #10 4 1/8"X9.5"	Lab&Env	Sorts: Contact1->State. Options: All checked.
smpe10oc.fp	Envelope #10 Other Contacts	Lab&Env	Sort: Contact1->Accountno. Options: Other Contacts checked.
smpe10oc.fp	Envelope #10 Other Contacts	Lab&Env	Sorts: Contact1->Accountno. Options: All checked.
smpenbs.fp	Envelope B5 176 X 250 mm	Lab&Env	Should be the same as red version. From 95REPS.EXE GoldMine update.
smpenbs.fp	Envelope B5 176 X 250 mm	Lab&Env	Sorts: Contact1->State. Options: All checked.
smpb5oc.fp	Envelope B5 Other Contacts	Lab&Env	Sort: Contact1->Accountno. Options: Other Contacts should be checked.
smpb5oc.fp	Envelope B5 Other Contacts	Lab&Env	Sorts: Contact1->Accountno. Options: All checked.

smpencs.fp	Envelope CS 162 X 229 mm	Lab&Env	Should be the same as red version. From 95REPS.EXE GoldMine update.
smpencs.fp	Envelope CS 162 X 229 mm	Lab&Env	Sorts: Contact1->State. Options: All checked.
smpcsoc.fp	Envelope CS Other Contacts	Lab&Env	Sort: Contact1->Accountno. Options: Other Contacts should be checked.
smpcsoc.fp	Envelope CS Other Contacts	Lab&Env	Sorts: Contact1->Accountno. Options: All checked.
smpendl.fp	Envelope DL 110 X 220 mm	Lab&Env	Should be the same as red version. From 95REPS.EXE GoldMine update.
smpendl.fp	Envelope DL 110 X 220 mm	Lab&Env	Sorts: Contact1->State. Options: All checked.
smpdloc.fp	Envelope DL Other Contacts	Lab&Env	Sort: Contact1->Accountno. Options: Other Contacts should be checked.
smpdloc.fp	Envelope DL Other Contacts	Lab&Env	Sorts: Contact1->Accountno. Options: All checked.
smpenmon.fp	Envelope Monarch 3 7/8 X 7.5"	Lab&Env	Should be the same as red version. From 95REPS.EXE GoldMine update.
smpenmon.fp	Envelope Monarch 3 7/8 X 7.5"	Lab&Env	Sorts: Contact1->State. Options: All checked.
smpmonoc.fp	Envelope Monarch Other Contacts	Lab&Env	Sort: Contact1->Accountno. Options: Other Contacts should be checked.
smpmonoc.fp	Envelope Monarch Other Contacts	Lab&Env	Sorts: Contact1->Accountno. Options: All checked.
nf1c4w3h.fp	Shipping label – Single Column (4x3)	Lab&Env	Sorts: none. Options: All checked.
nf1c4w3h.fp	Shipping label – Single Column, 4x3	Lab&Env	Should be the same as red version.
wwfilter.fp	Filters Listing	Other	Should be the same as red version.
wwfilter.fp	Filters Listing	Other	Sorts: Filters->Userid, Filters->Name.
lookup.fp	Lookup File Listing	Other	Should be the same as red version. From 95REPS.EXE GoldMine update.
lookup.fp	Lookup File Listing	Other	Sorts: Lookup->Fieldname CITY to CITYz.
smpmailb.fp	Mailbox Report	Other	Sort: Mailbox->Userid, Mailbox->Maildate. Options: n/a.
smpmailb.fp	Mailbox Report	Other	Sorts: MailBox->Userid, MailBox->Maildate.
formlist.fp	Merge Form List	Other	Should be the same as red version.
formlist.fp	Merge Form List	Other	Sorts: Forms->Userid &user to &user, Forms->Formdesc.
defau005.fp	Rolodex	Other	Should be the same as red version.
defau005.fp	Rolodex	Other	Sorts: Rolodex->Userid &user to &user, Rolodex->Contact.
lescript.fp	Scripts Report	Other	Should be the same as red version.
lescript.fp	Scripts Report	Other	Sorts: Rectype.
smpuslt.fp	Users List	Other	Should be the same as red version.
smpuslt.fp	Users List	Other	Sorts: Users->Name.

[1]As these are the default settings, see any particular report's Notes sections under Properties Button (Report Profile window), for possible suggestions on other sorts or other information.

The list below is the same as the list above, but sorted by Original Filename.

Original FileName	Description	Report Category
activity.fp	Activity Listing	Calendar
av7160.fp	Avery 7160 Primary Contacts	Lab&Env
av7160.fp	Avery 7160 Primary Contacts	Lab&Env
av7161.fp	Avery 7161 Primary Contacts	Lab&Env
av7161.fp	Avery 7161 Primary contacts	Lab&Env
av7162.fp	Avery 7162 Primary Contacts	Lab&Env
av7162.fp	Avery 7162 Primary Contacts	Lab&Env
av7163.fp	Avery 7163 Primary Contacts	Lab&Env
av7163.fp	Avery 7163 Primary Contacts	Lab&Env
av7164.fp	Avery 7164 Primary Contacts	Lab&Env
av7164.fp	Avery 7164 Primary Contacts	Lab&Env
av7165.fp	Avery 7165 Primary Contacts	Lab&Env
av7165.fp	Avery 7165 Primary Contacts	Lab&Env
c1.fp	*Calendar Default Report	Calenda
c1.fp	A Calendar Default Report	Calendar
c1fp000.fp	Appointment List	Calendar
c1fp002.fp	12 Hour Appointment List	Calenda
c1fp002.fp	Daily Appointment List	Calendar
caldf.fp	Daily – DayTimer (summary)	Calendar
caldf.fp	Daily – DayTimer (summary)	Calendar
caldv.fp	Daily – DayTimer (detailed)	Calendar
caldv.fp	Daily – DayTimer (detailed)	Calendar
calmv.fp	Monthly – DayTimer	Calendar
calmv.fp	Monthly – DayTimer	Calendar
calwl.fp	Weekly – DayTimer *Avery 41357	Calendar
calwl.fp	Weekly – DayTimer *Avery 41357	Calendar
calwl000.fp	Weekly – DayTimer (portrait)	Calendar
calwl000.fp	Weekly – DayTimer (portrait)	Calendar
comp2nf.fp		
compsale.fp	Completed Sales by User	Analysis
compsale.fp	Completed Sales by User	Analysis
conta001.fp	Phone Calls Log	Analysis
conta001.fp	Phone Calls Log	Analysis
conta002.fp	Phone Calls Statistics	Analysis
conta002.fp	Phone Calls Statistics	Analysis
conta003.fp	Completed Sales by User per Month (2)	Analysis
conta003.fp	Completed Sales by User per Month (2)	Analysis
conta005.fp		
conta006.fp		
contl000.fp		
contline.fp	Contact Line Report – Landscape	Contact
contline.fp	Contact Line Report – Landscape	Contact
contprof.fp	Contact Profile (Detailed)	Contact
contprof.fp	Contact Profile (Detailed)	Contact

defau005.fp	Rolodex	Other
defau005.fp	Rolodex	Other
default.fp		
default.fp		
fonebus.fp	Phone Book Bus.Card Style	Contact
fonebus.fp	Phone Book Business Card Style	Contact
fonelist.fp	Phone Book	Contact
fonelist.fp	Phone Book	Contact
foneoth.fp	Phone Book (Primary & Additional)	Contact
foneoth.fp	Phone Book (Primary & Additional)	Contact
formlist.fp	Merge Form List	Other
formlist.fp	Merge Form List	Other
histline.fp	History Wide Line Report	Contact
histline.fp	History Wide Line Report	Contact
histref.fp	History & Referrals Report	Contact
histref.fp	History & Referrals Report	Contact
intadd.fp	**Internet Address Report**	**Contact**
intadd.fp	Internet Address Report	Contact
le4fones.fp	Phone1 & Fax Report – Landscape	Contact
le4fones.fp	Phone1 & Fax Report – Landscape	Contact
le5160pr.fp	Avery 5160 Primary Contacts	Lab&Env
le5160pr.fp	Avery 5160 Primary Contacts	Lab&Env
le5161pr.fp	Avery 5161 Primary Contacts	Lab&Env
le5161pr.fp	Avery 5161 Primary Contacts	Lab&Env
le5162pr.fp	Avery 5162 Primary Contacts	Lab&Env
le5162pr.fp	Avery 5162 Primary Contacts	Lab&Env
le5163pr.fp	Avery 5163 Primary Contacts	Lab&Env
le5163pr.fp	Avery 5163 Primary Contacts	Lab&Env
le5164pr.fp	Avery 5164 Primary Contacts	Lab&Env
le5164pr.fp	Avery 5164 Primary Contacts	Lab&Env
leaddrph.fp	Address & Phone	Contact
leaddrph.fp	Address & Phone	Contact
leapptls.fp	Appointments List	Contact
leapptls.fp	Appointments List	Contact
lecallbk.fp	Call Backs List	Contact
lecallbk.fp	Call Backs List	Contact
lecmphst.fp	Completed Activity List	Contact
lecmphst.fp	Completed Activity List	Contact
lecomhst.fp	Contact History Report	Contact
lecomhst.fp	Contact History Report with Notes	Contact
lefutact.fp	Future Activity Report	Contact
lefutact.fp	Pending Activity Report	Contact
lekeyusr.fp	Contacts with Key & UserDef Fields	Contact
lekeyusr.fp	Contacts with Key & UserDef Fields	Contact
lelink.fp	Linked Documents	Contact
lelink.fp	Linked Documents	Contact

lemessag.fp	Messages List	Contact
lemonth.fp	Activities Monthly	Calendar
lemonth.fp	Activities Monthly	Calendar
lenxt000.fp		
lenxt001.fp		
lescript.fp	Scripts Report	Other
lescript.fp	Scripts Report	Other
letaskrp.fp		
lexprof.fp	n/a (no info in 95REPS.EXE Readme)	
lookup.fp	Lookup File Listing	Other
lookup.fp	Lookup File Listing	Other
nf1c4w3h.fp	Shipping label – Single Column (4x3)	Lab&Env
nf1c4w3h.fp	Shipping label – Single Column, 4x3	Lab&Env
nf4143p.fp	Avery 4143 Primary Contacts	Lab&Env
nf4143p.fp	Avery 4143 Primary Contacts	Lab&Env
nf4144p.fp	Avery 4144 Primary Contacts	Lab&Env
nf4144p.fp	Avery 4144 Primary Contacts	Lab&Env
oclist.fp	Other Contacts Listing	Contact
oclist.fp	Other Contacts Listing	Contact
orgtree.fp	Organizational Tree	Contact
orgtree.fp	Organizational Tree	Contact
oth4143.fp	Avery 4143, Other Contacts	Lab&Env
oth4143.fp	Avery 4143, Other Contacts	Lab&Env
oth4144.fp	Avery 4144, Other Contacts	Lab&Env
oth4144.fp	Avery 4144, Other Contacts	Lab&Env
oth5160.fp	Avery 5160, Other Contacts	Lab&Env
oth5160.fp	Avery 5160, Other Contacts	Lab&Env
oth5161.fp	Avery 5161, Other Contacts	Lab&Env
oth5161.fp	Avery 5161, Other Contacts	Lab&Env
oth5162.fp	Avery 5162, Other Contacts	Lab&Env
oth5162.fp	Avery 5162, Other Contacts	Lab&Env
oth5163.fp	Avery 5163, Other Contacts	Lab&Env
oth5163.fp	Avery 5163, Other, Contacts	Lab&Env
oth5164.fp	Avery 5164, Other Contacts	Lab&Env
oth5164.fp	Avery 5164, Other Contacts	Lab&Env
proflist.fp	Profiles Report	*Contact
readme.fp		
slsforcs.fp	Sales Forecast Report By User	*Analysis
smpactan.fp	Scheduled Activities Analysis	Analysis
smpactan.fp	Scheduled Activities Analysis	Analysis
smpb5oc.fp	Envelope B5 Other Contacts	Lab&Env
smpb5oc.fp	Envelope B5 Other Contacts	Lab&Env
smpcas.fp		
smpcontp.fp	Contact Info (Top Half of Screen)	Contact
smpcontp.fp	Contact Info (Top Half of Screen)	Contact
smpcsoc.fp	Envelope CS Other Contacts	Lab&Env

smpcsoc.fp	Envelope CS Other Contacts	Lab&Env
smpcsum.fp	Completed Sales by User per Month	Analysis
smpcsum.fp	Completed Sales by User per Month	Analysis
smpdloc.fp	Envelope DL Other Contacts	Lab&Env
smpdloc.fp	Envelope DL Other Contacts	Lab&Env
smpdupch.fp	**Potential Duplicate Contact Report**	**Contact**
smpe10oc.fp	Envelope #10 Other Contacts	Lab&Env
smpe10oc.fp	Envelope #10 Other Contacts	Lab&Env
smpenbs.fp	Envelope B5 176 X 250 mm	Lab&Env
smpenbs.fp	Envelope B5 176 X 250 mm	Lab&Env
smpencs.fp	Envelope CS 162 X 229 mm	Lab&Env
smpencs.fp	Envelope CS 162 X 229 mm	Lab&Env
smpendl.fp	Envelope DL 110 X 220 mm	Lab&Env
smpendl.fp	Envelope DL 110 X 220 mm	Lab&Env
smpenmon.fp	Envelope Monarch 3 7/8 X 7.5"	Lab&Env
smpenmon.fp	Envelope Monarch 3 7/8 X 7.5"	Lab&Env
smpfsfcd.fp	**Forecasted Sales Funnel by Cycle (detail)**	**Analysis**
smpfsfms.fp	**Forecasted Sales Funnel by Month(Yearly)**	**Analysis**
smpfsru.fp	Forecasted Sales by User	Analysis
smpfsru.fp	Forecasted Sales by User	Analysis
smpfsum.fp	Forecasted Sales by User per Month	Analysis
smpfsum.fp	Forecasted Sales by User per Month	Analysis
smph&pts.fp	History & Pending Report	Contact
smph&pts.fp	History & Pending Report	Contact
smpmailb.fp	Mailbox Report	Other
smpmailb.fp	Mailbox Report	Other
smpml2.fp	Message List	Contact
smpml2.fp	Message List	Contact
smpmonoc.fp	Envelope Monarch Other Contacts	Lab&Env
smpmonoc.fp	Envelope Monarch Other Contacts	Lab&Env
smpnal2.fp	Next Actions List	Contact
smpnal2.fp	Next Actions List	Contact
smpnt.fp	Contacts with Notes Tab	Contact
smpnt.fp	Contacts with Notes Tab	Contact
smpo&p.fp	Opportunity Manager: Opportunities	Analysis
smpo&p.fp	Opportunity Manager: Opportunities	Analysis
smpo&p2.fp	Opportunity Manager: Projects	Analysis
smpo&p2.fp	Opportunity Manager: Projects	Analysis
smppt.fp	Contacts with Profile Tab	Contact
smppt.fp	Contacts with Profile Tab	Contact
smppwlr.fp	Pending Wide Line Report	Contact
smppwlr.fp	Pending Wide Line Report	Contact
smpsffl.fp	Forecasted Sales Funnel by User	Analysis
smpsffl.fp	Forecasted Sales Funnel by User	Analysis
smpsffl2.fp	Forecasted Sales Funnel by User (detail)	Analysis
smpsffl2.fp	Forecasted Sales Funnel by User (detailed)	Analysis

smpsfse.fp[c]	Forecasted Sales by User (2)	Analysis
smpsfse.fp[c]	Forecasted Sales by User (2)	Analysis
smpsfum.fp	Forecasted Sales by User per Month (2)	Analysis
smpsfum.fp	Forecasted Sales by User per Month (2)	Analysis
smptd.fp	To Do Listing	Contact
smptd.fp	To Do Listing	Contact
smpuslt.fp	Users List	Other
smpuslt.fp	Users List	Other
smpwalst.fp	Weekly Appointment List (portrait)	Calendar
smpwalst.fp	Weekly Appointment List (portrait)	Calendar
wwdir.fp	Directory of Primary and Other Contacts	Contact
wwdir.fp	Directory of Primary and Other Contacts	Contact
wwenv10.fp	Envelope #10	Lab&Env
wwenv10.fp	Envelope #10 4 1/8”X9.5”	Lab&Env
wwfilter.fp	Filters Listing	Other
wwfilter.fp	Filters Listing	Other