Semantic Layer Exercises

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Prepared for:	Learning Resources
Module:	Business Intelligence
Date:	2016
Document Ref:	LMDSY0031
Version:	11.05

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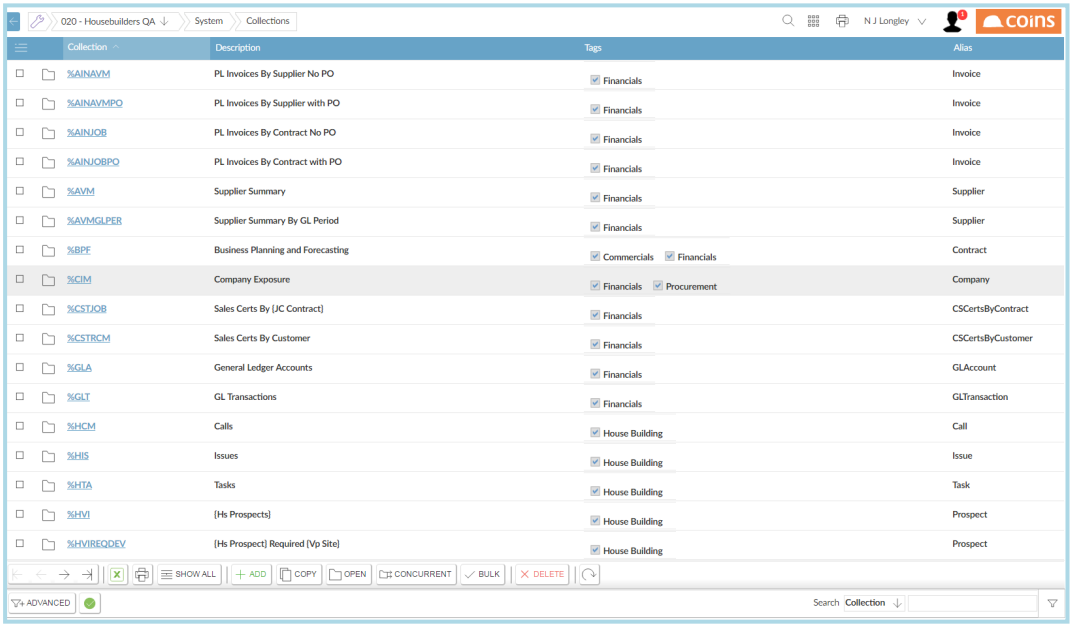
1 Exercise - A Simple Listing Report

In this exercise we are going to use the Semantic Layer to setup a Data Set for basic Contract Details and incorporate this into a report.

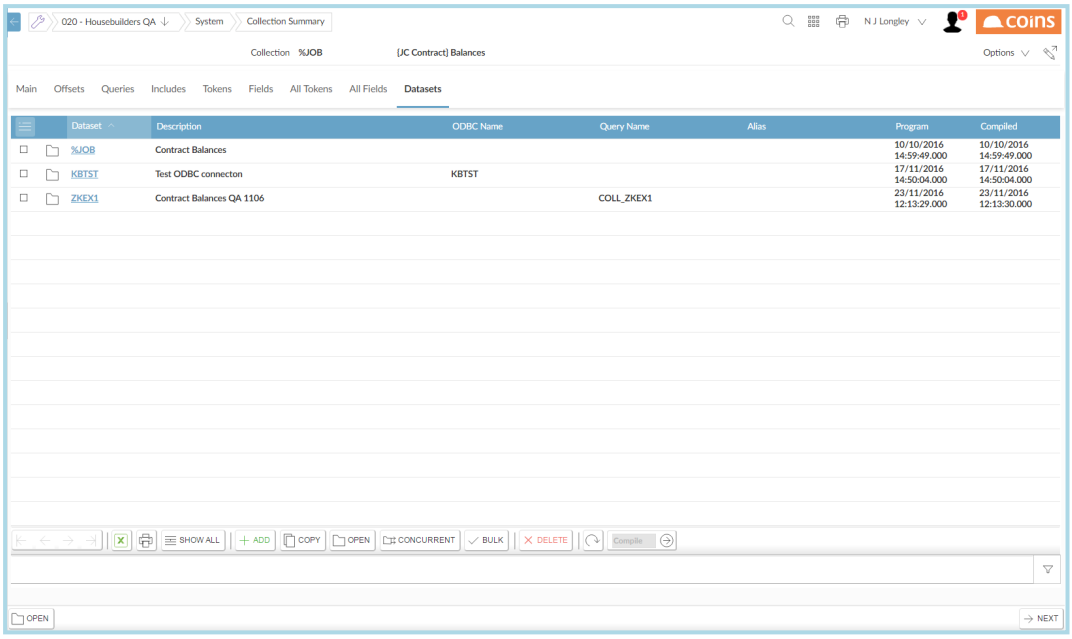
1.1 Build the Data Set

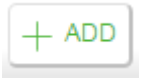
Navigate to the OA Reporting and BI module and select the Semantic Layer Sub-folder.

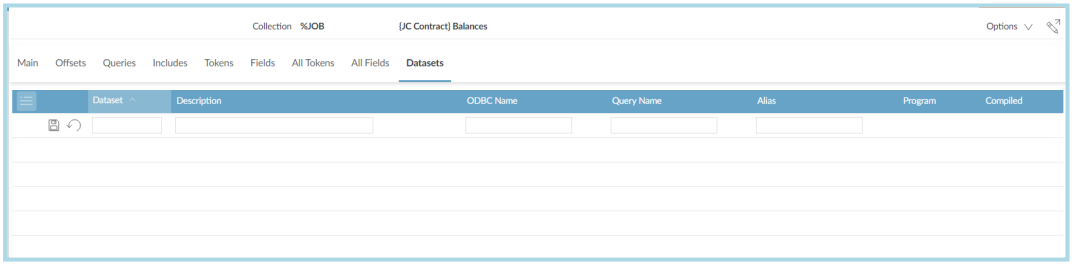
Select the Collections menu option.



Select the Hyperlink on the %JOB Collection and select the Datasets Tab



Click 

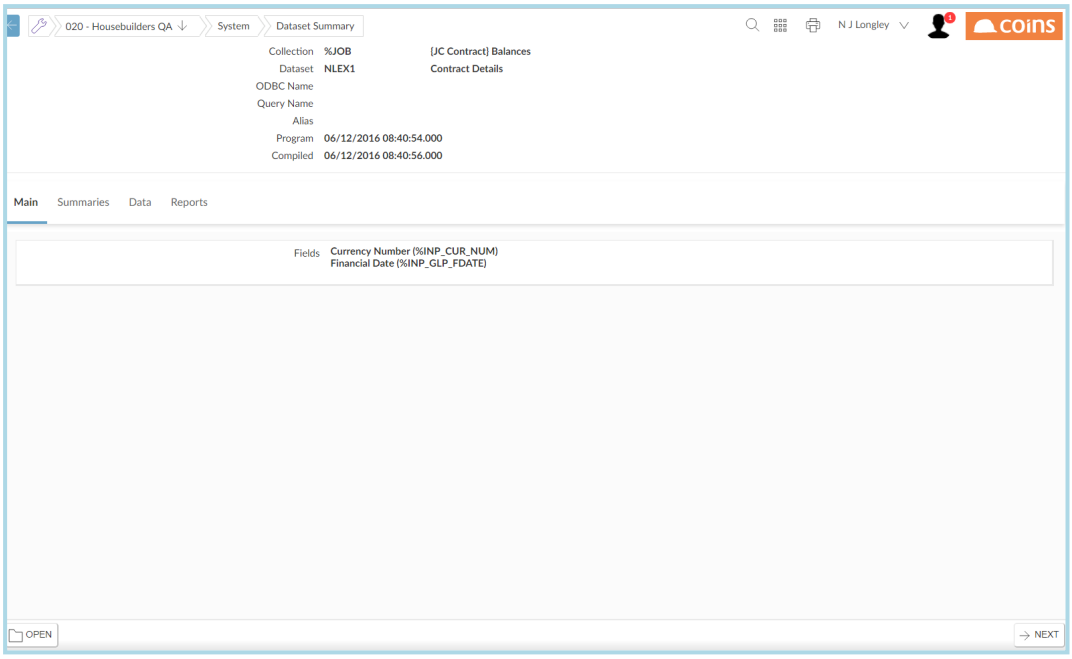


Enter a Dataset name of xxEX1 (Where xx are your initials).

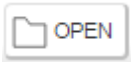
Enter a description of Contract Details

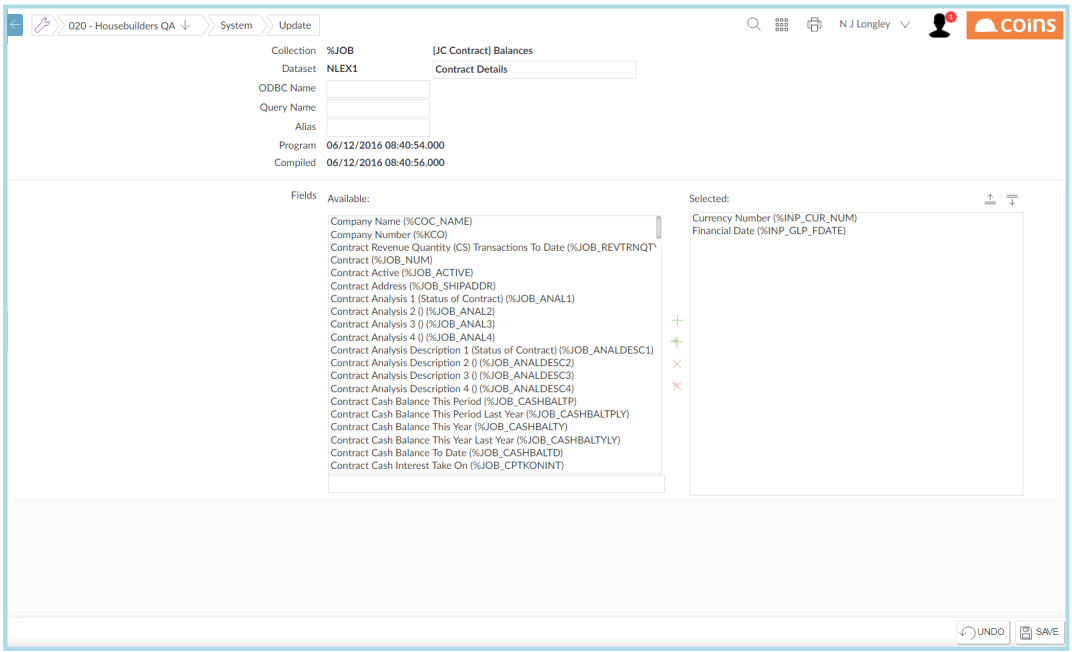
Leave ODBC and Query Name details blank at this stage – we will return to these later

Click



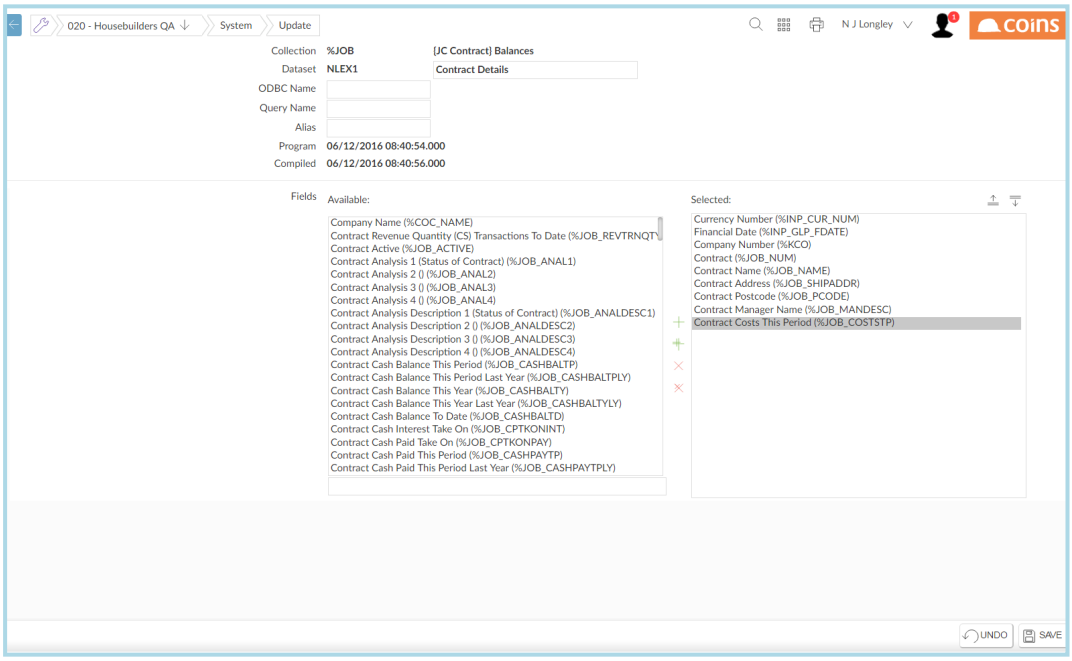
The Main Tab will display any mandatory fields that are required for the operation of the dataset.

Click 



From the Available field locate the following fields and move then to the Selected field.

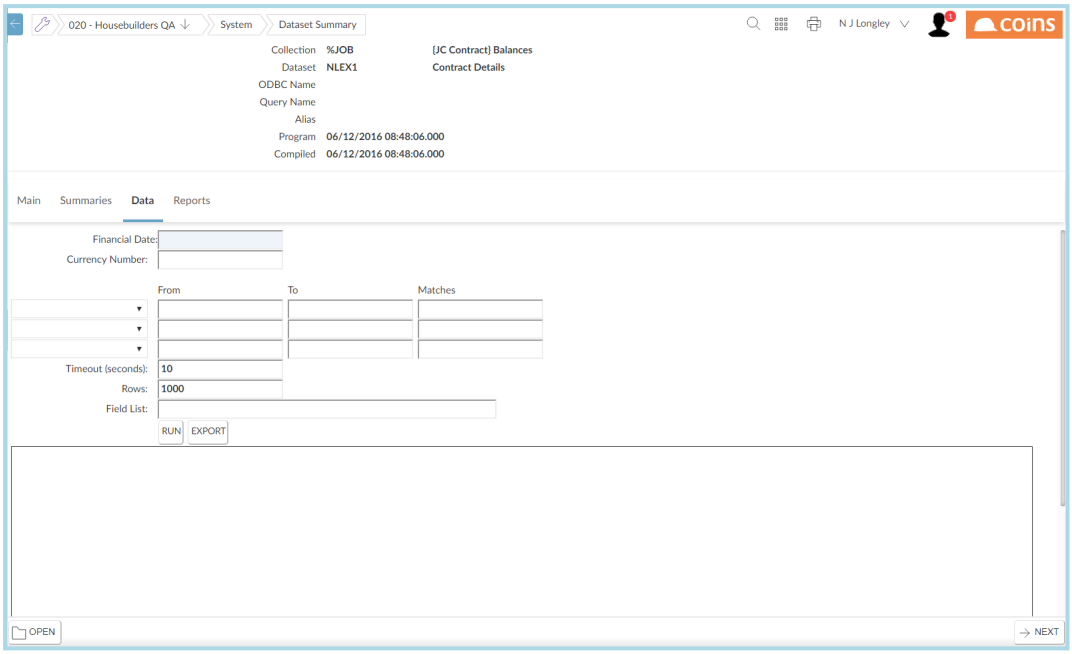
Company Number (%KCO)
Contract (%JOB_NUM)
Contract Name (%JOB_NAME)
Contract Address (%JOB_SHIPADDR)
Contract Post Code (%JOB_PCODE)
Contact Manager Name (%JOB_MANDESC)
Contract Costs This Period (%JOB_COSTSTP)



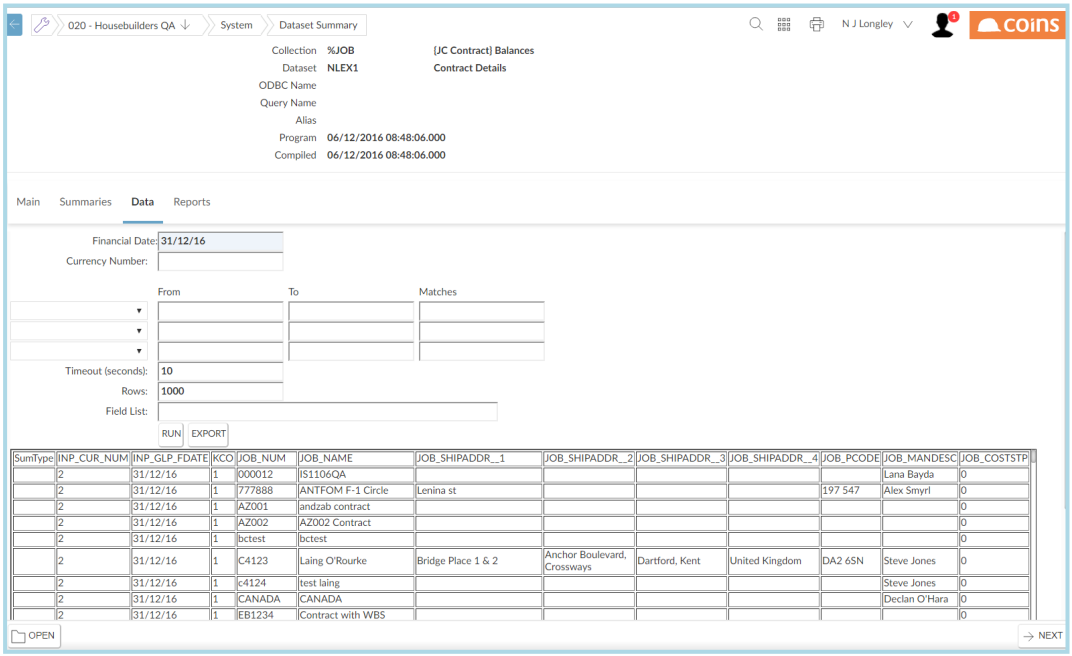
Click

1.2 Test the Dataset

Select the Data tab

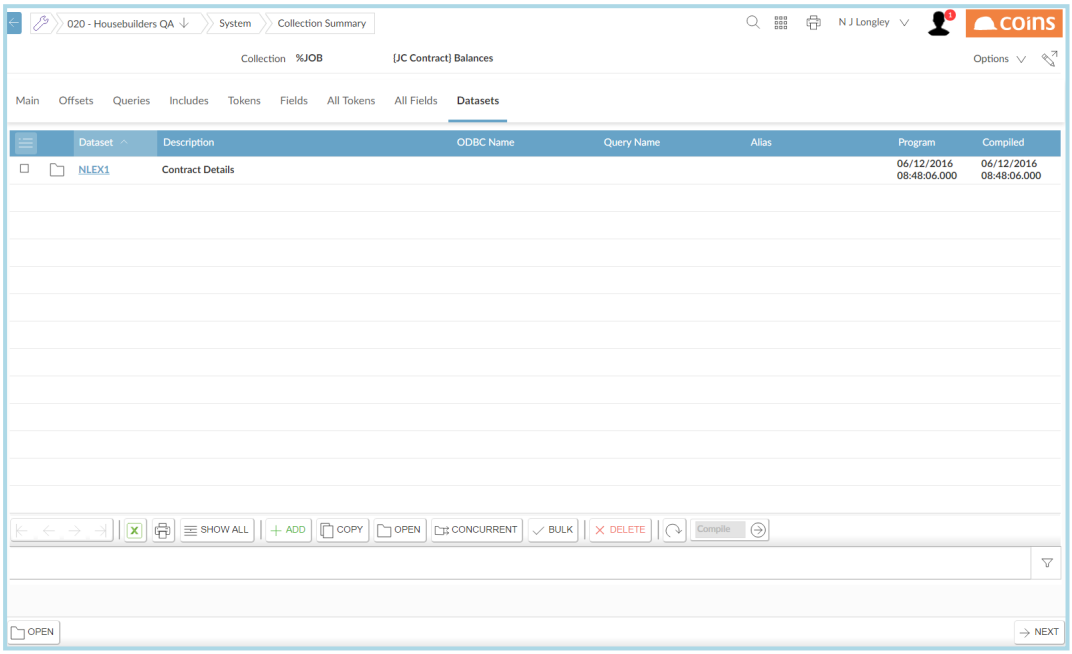


The yellow field indicates where a mandatory value is required – in this case it is the Financial Period on which we want to report. Enter a valid Financial Date and click Run

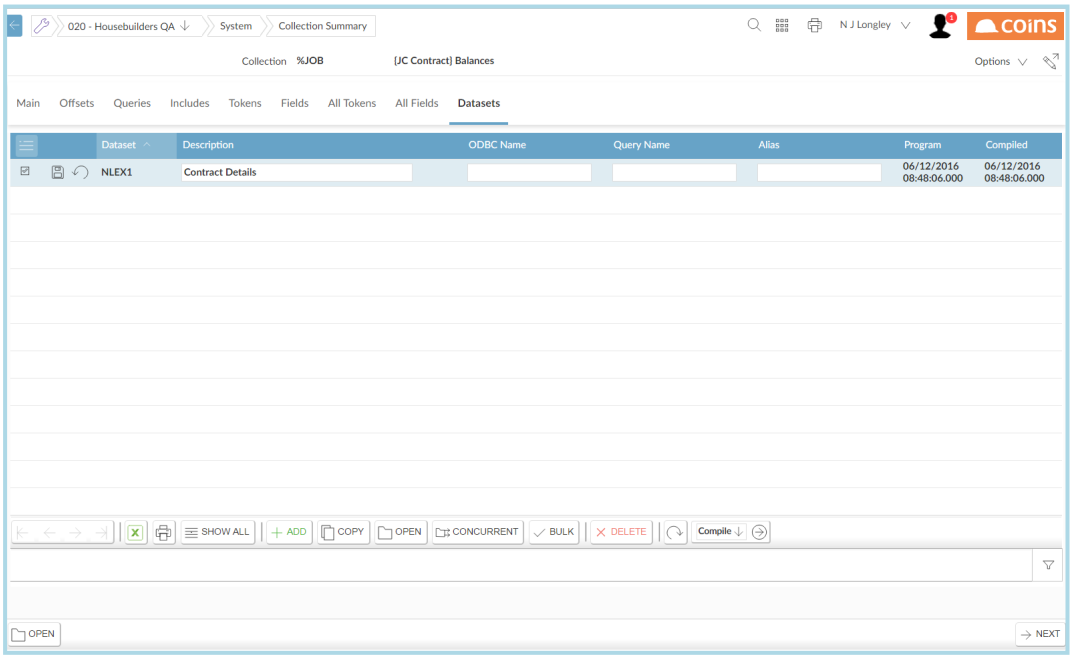


1.3 Make the Dataset available to the Reporting Tools

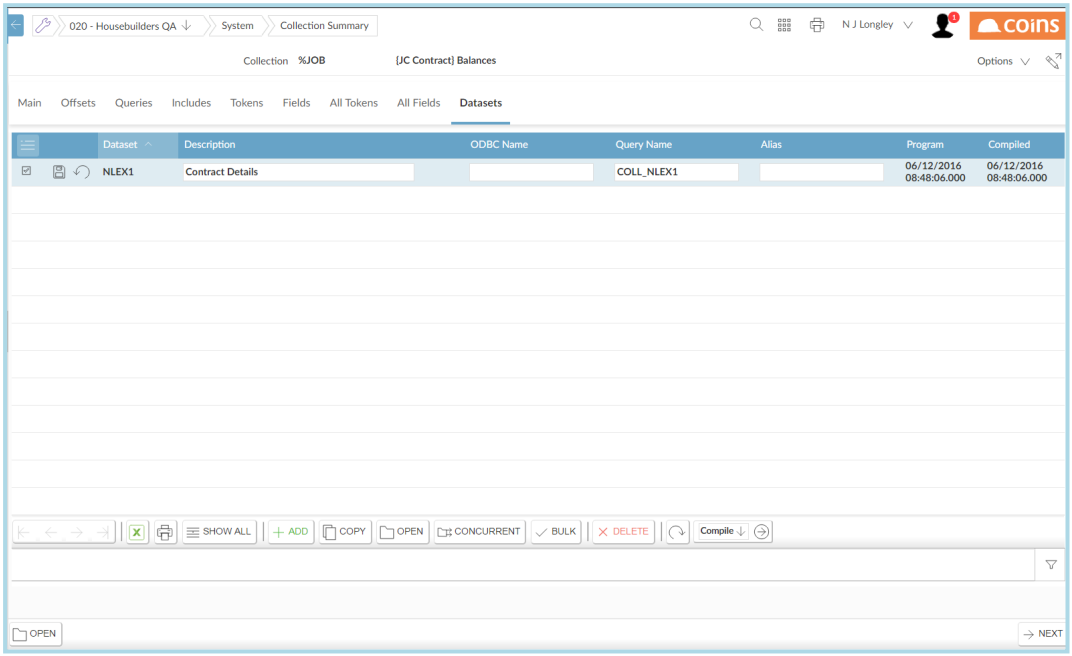
Return to the Collection %JOB and select the Dataset Tab



Open the Dataset by clicking against the Dataset Name.



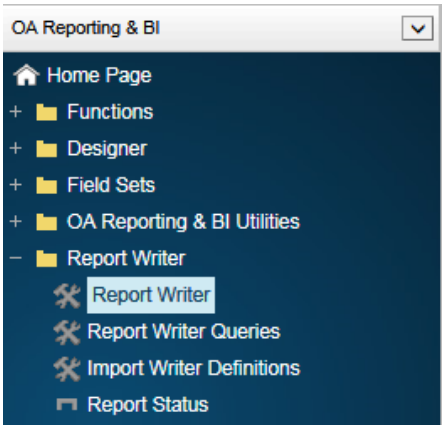
In the Query Name field, enter COLL_xxEX1 (Where xx are your initials). We recommend prefixing Semantic Layer Query Names with COLL_ as it makes locating them easier later on.



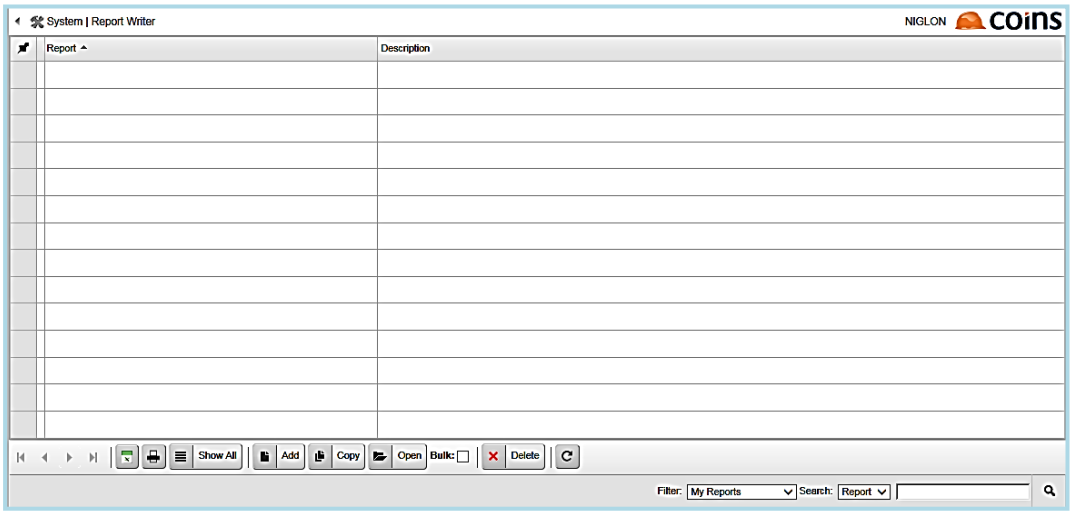
Click

1.4 Using the Dataset in a Report Writer Report

This exercise assumes familiarity with the Report Writer Tool and therefore does not go into detail on its operation. A separate detailed guide on Report Writer is available from the COINS Learning Resources section in the Client Area on the COINS Website.



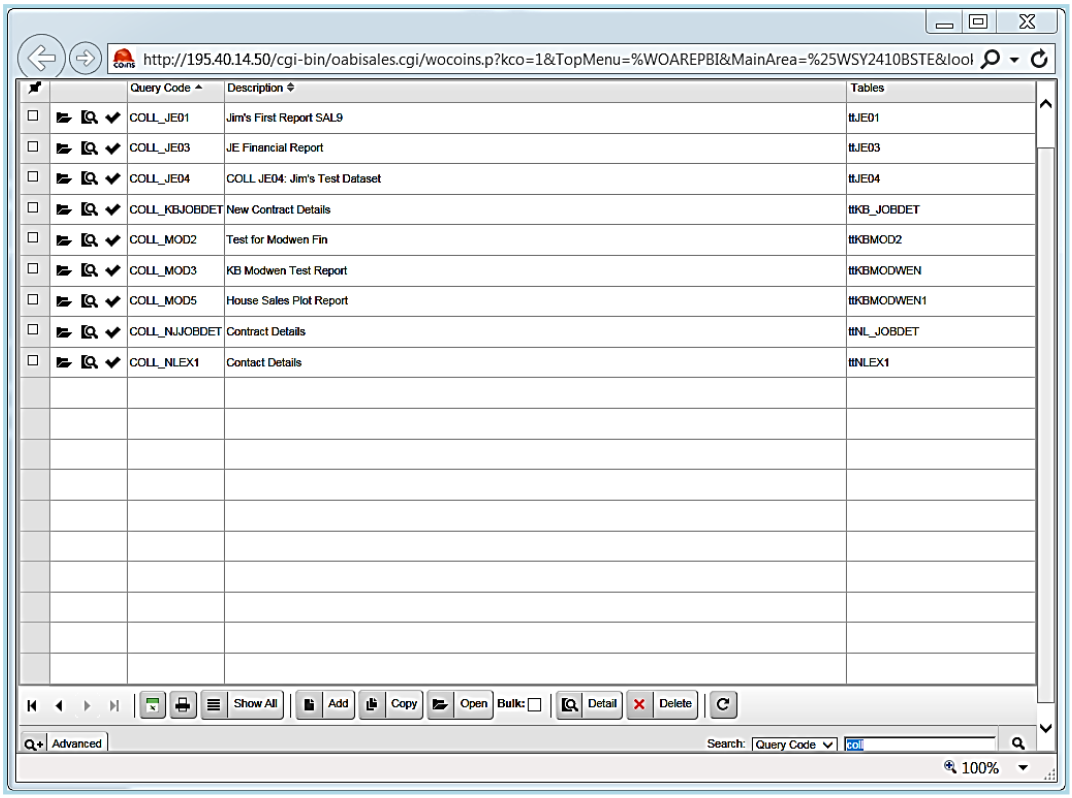
In the OA Reporting and BI Module, select the Report Writer Sub folder and select the Report Writer option



Click

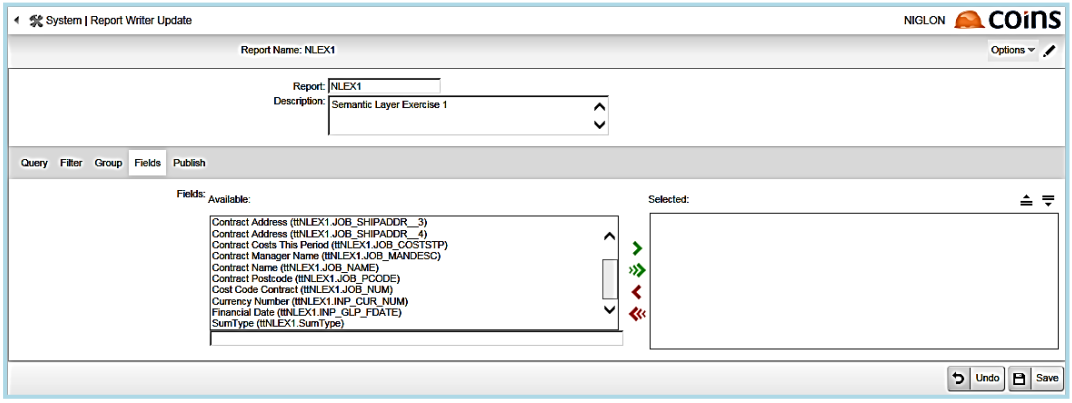
Give your report a name and description and click the Query lookup .

Set the Search filter to Query Code and COLL



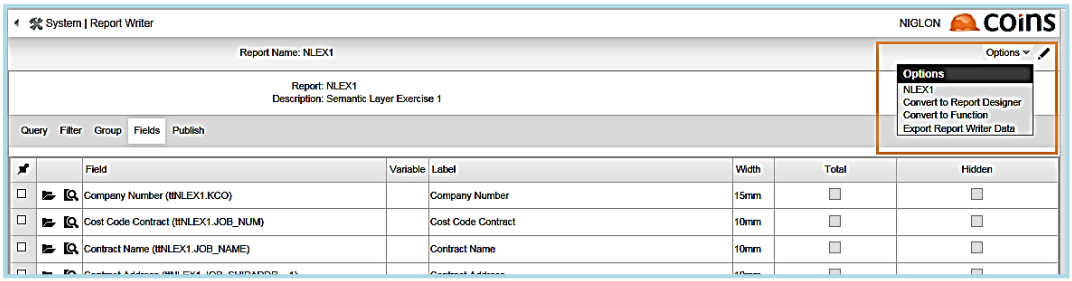
Select the Query COLL_xxEX1 (Where xx is your initials) using the Select button. This Query was created when you specified the Query Name against your Dataset within the Semantic Layer.

The fields available for selection are those as defined within the Dataset

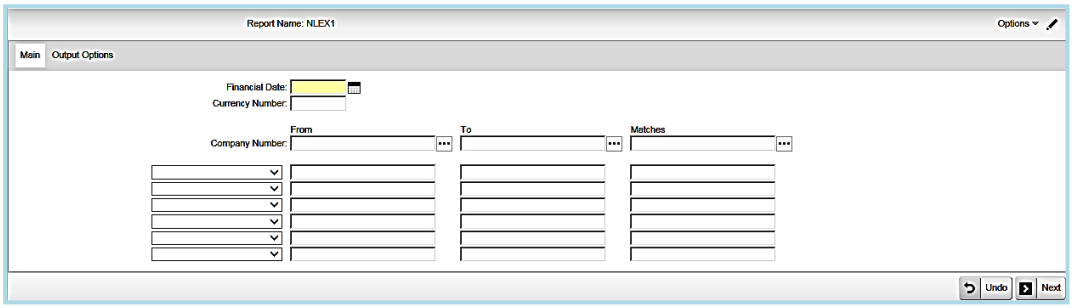


Select your fields arrange the order as required. Click Save.

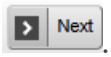
To run the report, click Options in the upper right of the screen



Select the Report name from the drop down menu

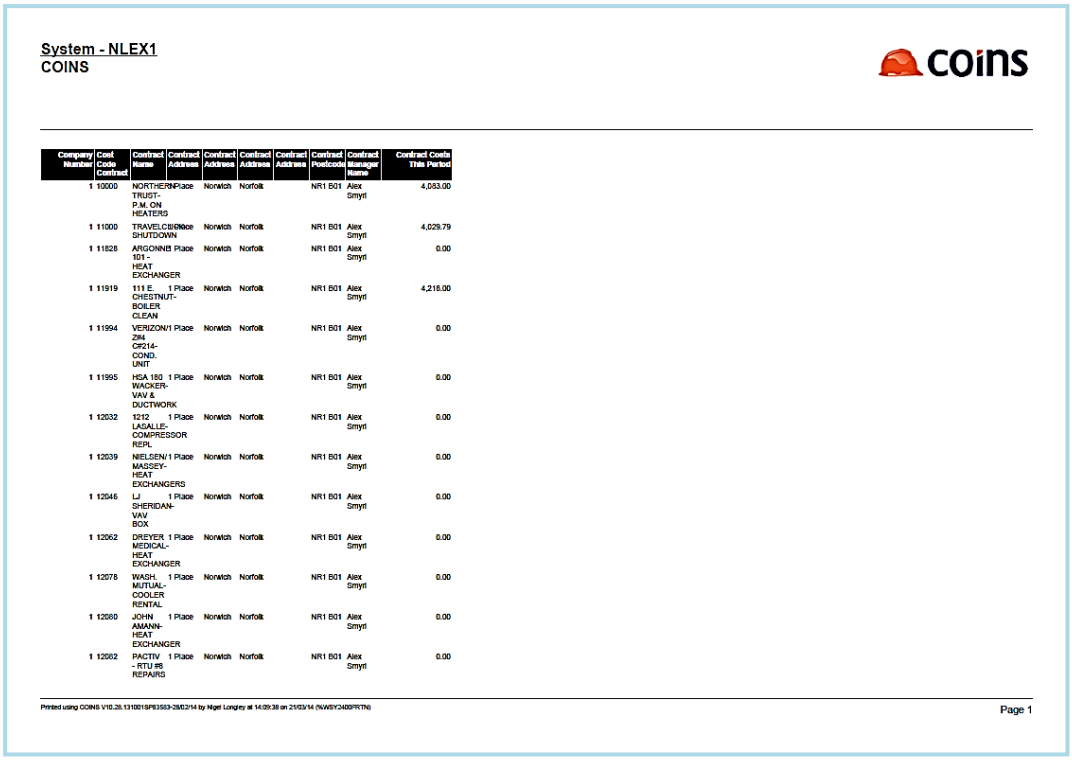


The selection screen from the Data tab on the Dataset definition is offered to the user for the record selection criteria. If any additional filtering is required, this can be built into the Report design using the Filter Tab.

Enter the record selection criteria. Yellow fields are mandatory. Note that the Company Number is not mandatory and will default to the Companies you have access to. This is a key difference to Standard OA Reports, which mostly run for a single COINS Company. Click 

.

The report will be available on the Report Status Workbench



System - NLEX1
COINS

Company Number	Cost Code Contract	Contract Name	Contract Address	Contract Address	Contract Address	Contract Address	Contract Postcode	Contract Manager Name	Contract Costs This Period
1	10000	NORTHERN TRUST-P.M. ON HEATERS	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	4,083.00
1	11000	TRAVELCIB SHUTDOWN	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	4,029.79
1	11828	ARGONNB 101 - HEAT EXCHANGER	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	11919	111 E. CHESTNUT-BOILER CLEAN	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	4,218.00
1	11994	VERIZON/1 2#4 CP214-COND. UNIT	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	11995	HSA 180 WACKER-VAV & DUCTWORK	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	12032	1212 LASALLE-COMPRESSOR REPL	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	12039	NIELSEN/1 MASSEY-HEAT EXCHANGERS	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	12046	LJ SHERIDAN-VAV BOX	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	12062	DREYER MEDICAL-HEAT EXCHANGER	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	12078	WASH. MUTUAL-COOLER RENTAL	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	12080	JOHN AMANN-HEAT EXCHANGER	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	12082	PACTIV - RTU #8 REPAIRS	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00

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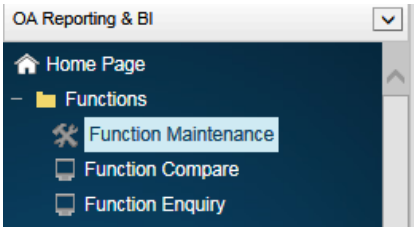
The report can now be modified to correct any issues with column width etc.

1.5 Using the Dataset in an OA Designer Report

This exercise assumes familiarity with the OA Designer Tool and therefore does not go into detail on its operation. If your company does not use the OA Designer Toolset, this exercise may be ignored.

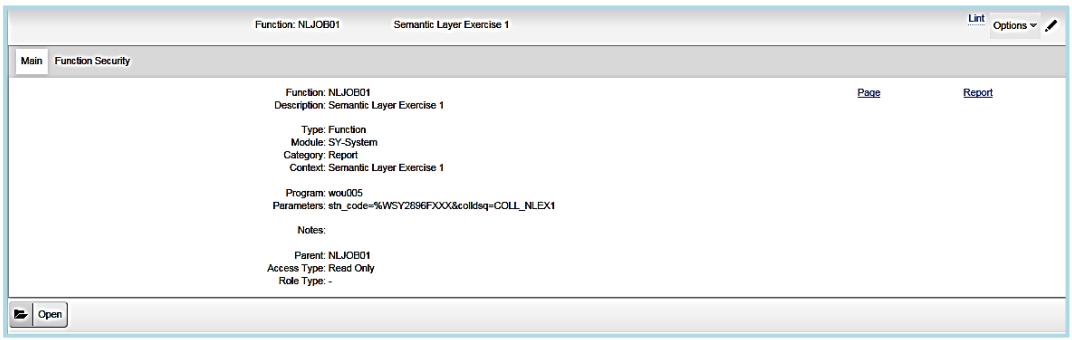


In the OA Reporting and BI Module, select the Functions folder and select the Function Maintenance option

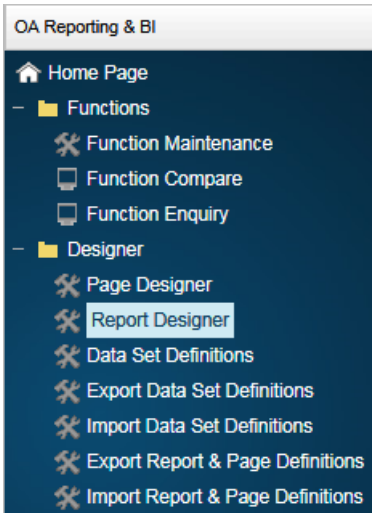
Create a new function with the following parameters (where COLL_NLEX1 is query name of our dataset)

stn_code=%WSY2896FXXX&colldsq=COLL_NLEX1

For example:



In the OA Reporting and BI Module, select the Designer folder and select the Report Designer option

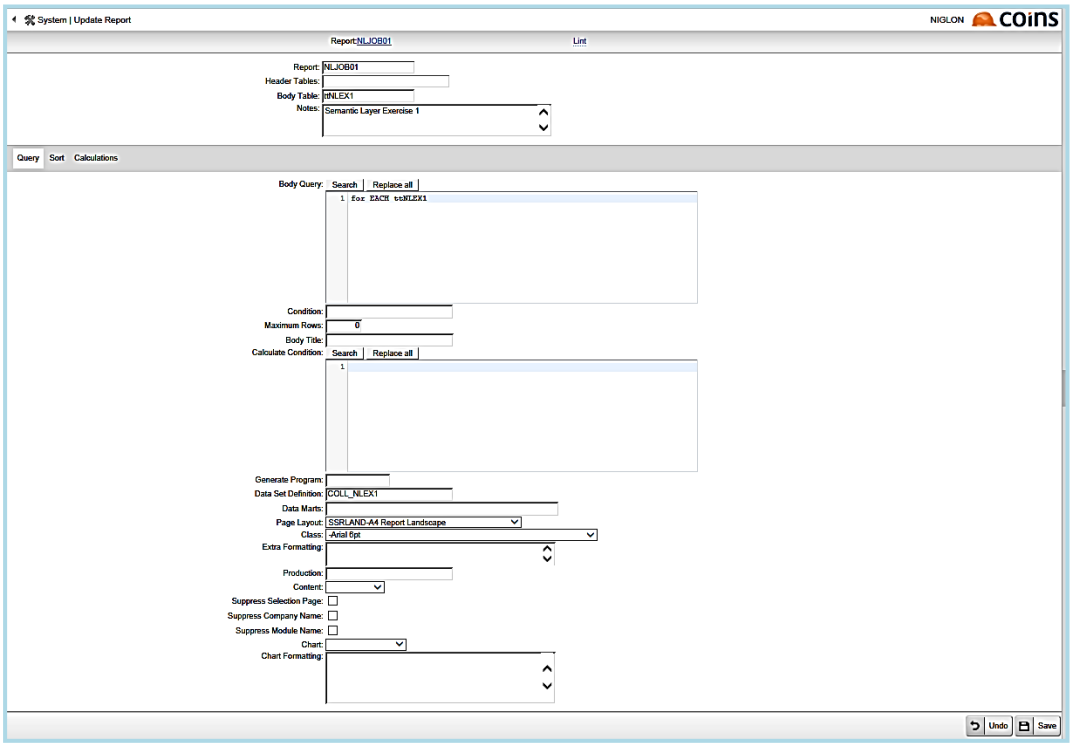


Add a new Report with the same name as the Function created above.

The body table will be ttNLEX1 (i.e. the name of the dataset prefixed with tt).

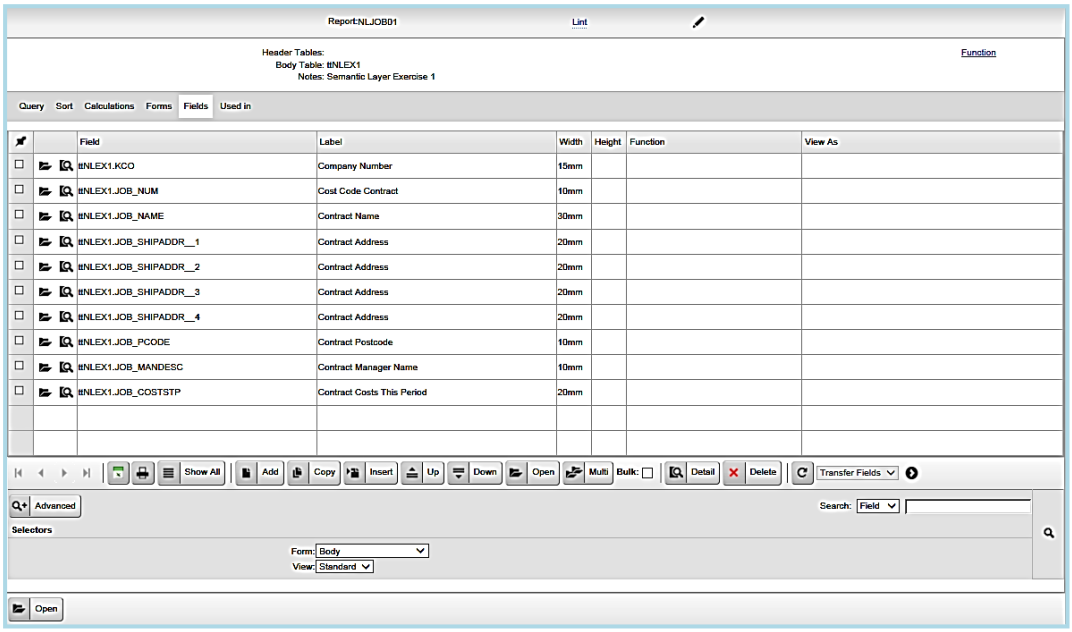
The body query will be: FOR EACH ttNLEX1

The Data Set Definition will be COLL_NLEX1 (i.e. the Query Name of the Dataset)

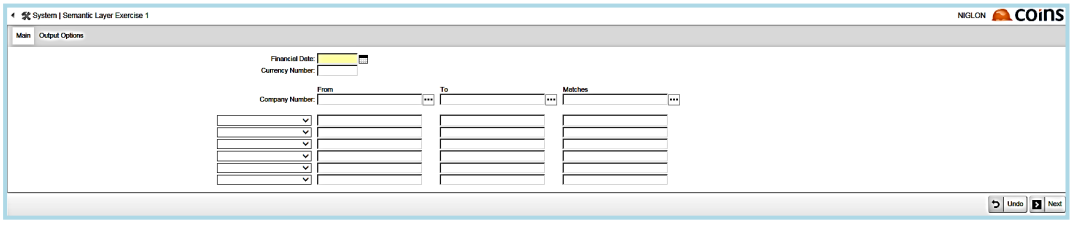


Click Save

Add a Body Form and add the required fields to it.



When the report is run, the Dataset selection screen is presented. Mandatory fields are in Yellow. Note that the Company Number is not mandatory and will default to the Companies you have access to. This is a key difference to Standard OA Reports, which mostly run for a single COINS Company.



When run, the output will be available from the Report Status Workbench

System - Semantic Layer Exercise 1
COINS

Company Number	Cost Code Contract	Contract Name	Contract Address	Contract Address	Contract Address	Contract Address	Contract Postcode	Contract Manager Name	Contract Costs This Period
1	10000	NORTHERN TRUST-P.M. ON HEATERS	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	4,083.00
1	11000	TRAVELCLICK-SHUTDOWN	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	4,029.79
1	11828	ARGONNE 101 - HEAT EXCHANGER	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	11919	111 E. CHESTNUT-BOILER CLEAN	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	4,218.00
1	11994	VERIZON/ZIM C#214-COND. UNIT	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	11995	HSA 180 WACKER-VAV & DUCTWORK	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	12032	1212 LASALLE-COMPRESSOR REPL	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	12039	NIELSEN/MASSEY-HEAT EXCHANGERS	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	12046	LJ SHERIDAN-VAV BOX	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	12062	DREYER MEDICAL-HEAT EXCHANGER	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	12078	WASH. MUTUAL-COOLER RENTAL	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	12080	JOHN AMANN-HEAT EXCHANGER	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	12082	PACTIV - RTU #8 REPAIRS	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	12083	AIM REALTY-INSTALL BOILER	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	12086	PACTIV - TURN DIFFUSERS	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	12087	WESTSIDE HOL-HEAT PUMP REPL	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	12088	VVC/960 CORP WOODS-RTU REPAIRS	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	12090	TELLABS/I BLDG.-RTU REPAIRS	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	12091	VVC/740 CORP. WOODS-RAIN HOOD	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	12093	CONFERENCE PLUS-LIEBERT SPLITS	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	12094	FIRST HEALTH-CHILLER REPAIRS	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00
1	12096	WASHINGTON MUTL-SPOT COOLER RN	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	-1,000.00
1	12099	SUN CHEMICAL-REPLACE BARREL	1 Place	Norwich	Norfolk		NR1 B01	Alex Smyrl	0.00

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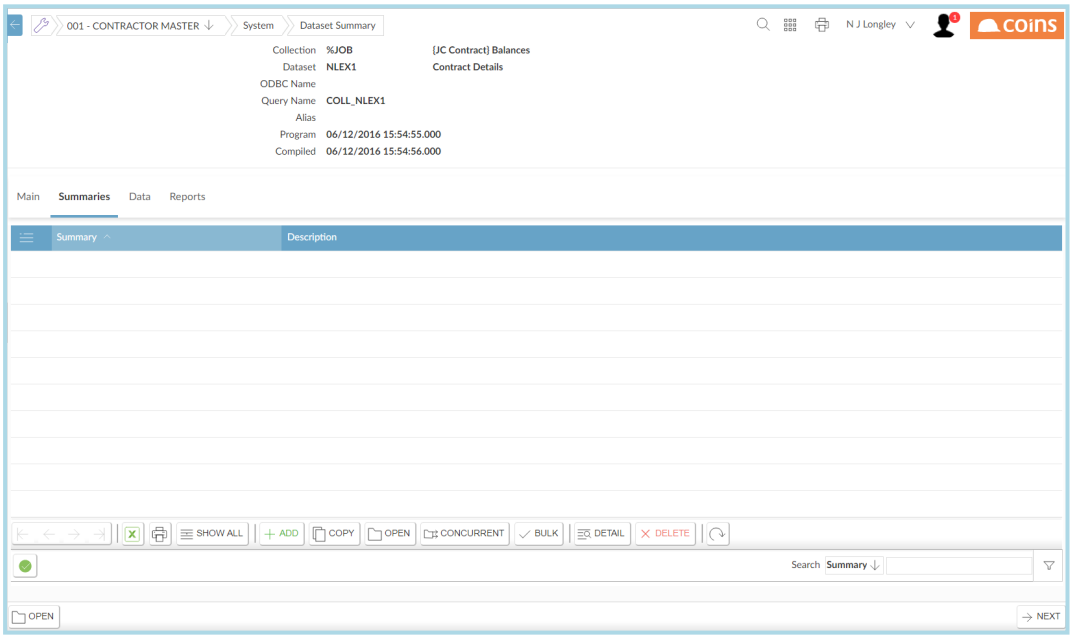
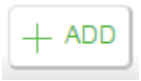
2 Exercise - Summaries

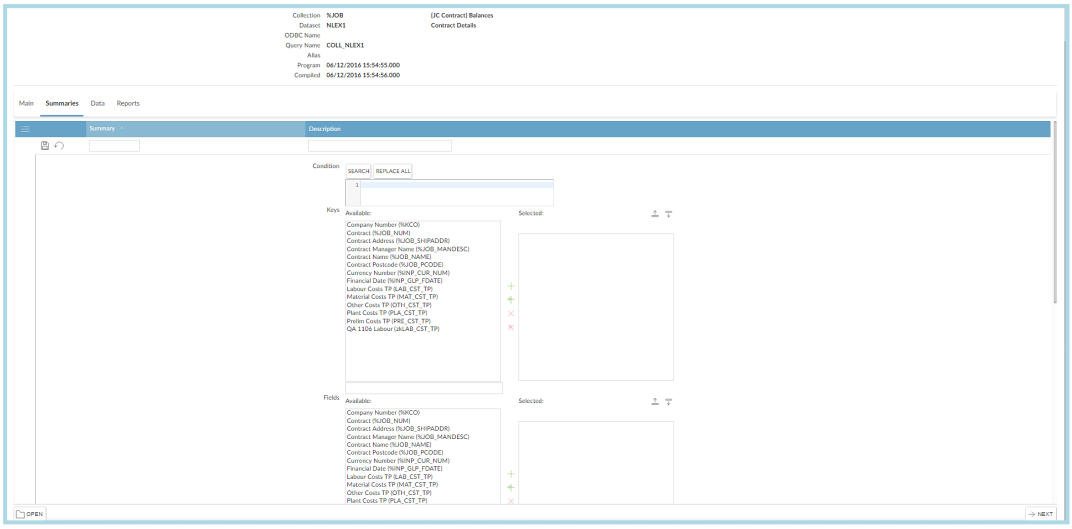
Within the Semantic Layer Dataset, you can have summary information created at the same time as the detailed data. These summaries can then be accessed within queries without the need to build separate datasets. This may be useful for running a series of inline reports based on detail and summary data – the dataset needs only be built once to feed each of the reports.

In the dataset we created in Exercise 1, open the dataset and click the Summaries Tab.



Here we can define different levels of summary, depending on your requirements.

Click 



The summary name can be any name you like, but COINS best practice is to use a three letter short code for the separate keys. KCO, JOB, MAN etc. for keys such as Company, Contract and Manager. Thus a summary on Company would be called KCO, a summary based on Company and Manager would be KCOMAN

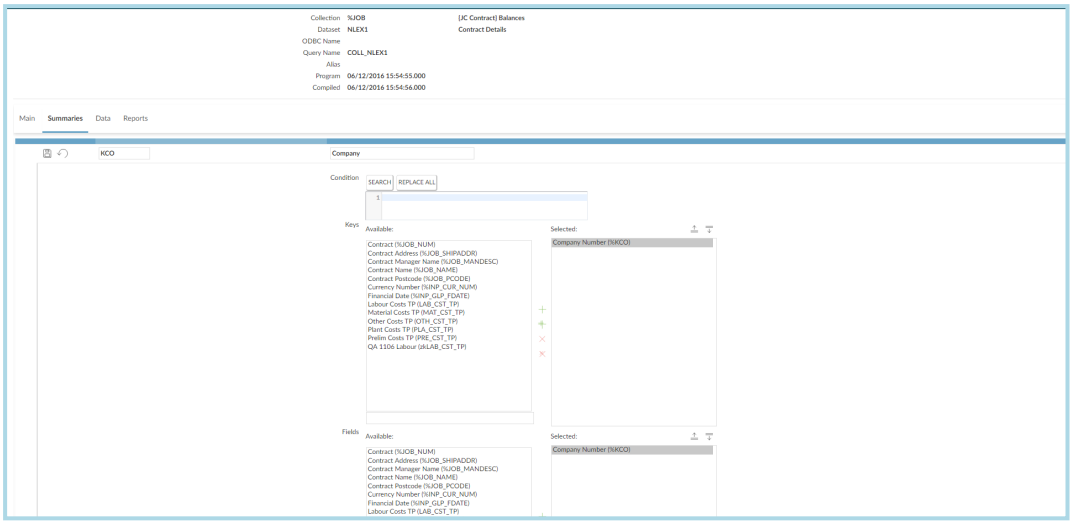
- Enter KCO as the summary name for our first summary level.

The Keys define which fields the summary will be based upon and the order you define them will set the order of the summary breakdown.

- Select the Key Company Number (%KCO)

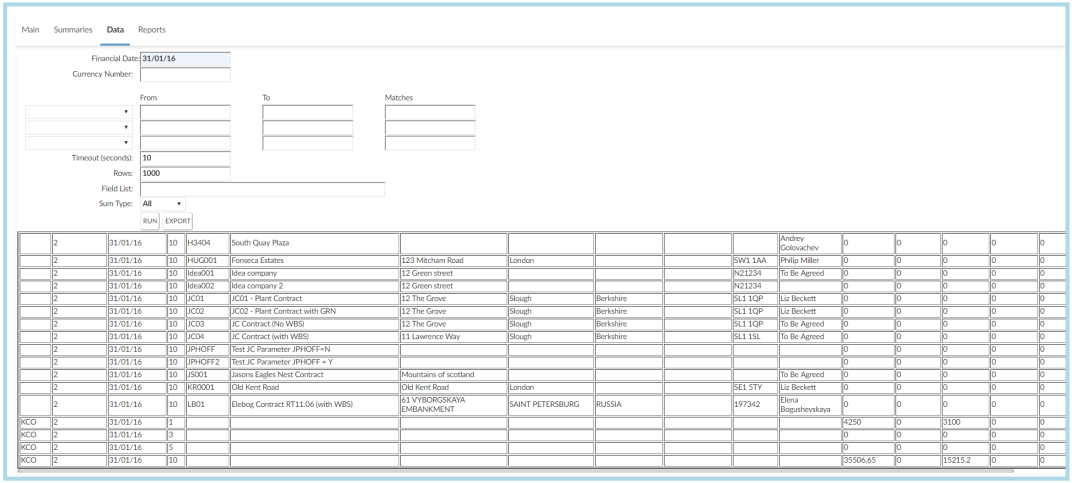
The fields' selector determines the fields that you want brought across into the summary. All numeric fields will be included by default and do not need to be selected, but text fields such as Company Name, Account Number etc. will not come across unless you s[specify them. The fields you bring across should be relevant to the summary keys you set, so in this example we are summarising by company, so contract names and contract numbers will be irrelevant.

- Select the Company Number field



Click Save and then click on the Data Tab

Run the data for a suitable period and scroll down the results to the last set of records.



	2	31/01/16	10	H3404	South Quay Plaza						Andrey Golovachev	0	0	0	0	0
	2	31/01/16	10	HUG001	Fonseca Estates	123 Mitcham Road	London			SW1 1AA	Philip Miller	0	0	0	0	0
	2	31/01/16	10	Idea001	Idea company	12 Green street				N21234	To Be Agreed	0	0	0	0	0
	2	31/01/16	10	Idea002	Idea company 2	12 Green street				N21234		0	0	0	0	0
	2	31/01/16	10	JC01	JC01 - Plant Contract	12 The Grove	Slough	Berkshire		SL1 1QP	Liz Beckett	0	0	0	0	0
	2	31/01/16	10	JC02	JC02 - Plant Contract with GRN	12 The Grove	Slough	Berkshire		SL1 1QP	Liz Beckett	0	0	0	0	0
	2	31/01/16	10	JC03	JC Contract (No WBS)	12 The Grove	Slough	Berkshire		SL1 1QP	To Be Agreed	0	0	0	0	0
	2	31/01/16	10	JC04	JC Contract (with WBS)	11 Lawrence Way	Slough	Berkshire		SL1 1SL	To Be Agreed	0	0	0	0	0
	2	31/01/16	10	JPHOFF	Test JC Parameter JPHOFF=N							0	0	0	0	0
	2	31/01/16	10	JPHOFF2	Test JC Parameter JPHOFF = Y							0	0	0	0	0
	2	31/01/16	10	JS001	Jasons Eagles Nest Contract	Mountains of scotland					To Be Agreed	0	0	0	0	0
	2	31/01/16	10	KR0001	Old Kent Road	Old Kent Road	London			SE1 5TY	Liz Beckett	0	0	0	0	0
	2	31/01/16	10	LB01	Elebog Contract RT11.06 (with WBS)	61 VYBORGSKAYA EMBANKMENT	SAINT PETERSBURG	RUSSIA		197342	Elena Bogushevskaya	0	0	0	0	0
KCO	2	31/01/16	1									4250	0	3100	0	0
KCO	2	31/01/16	3									0	0	0	0	0
KCO	2	31/01/16	5									0	0	0	0	0
KCO	2	31/01/16	10									35506.65	0	15215.2	0	0

Where the column Sumtype is blank, these are the detail records. At the end of the list will be records with the sumtype KCO for the summary records you have just created. The entry KCO is the name of your summary level.

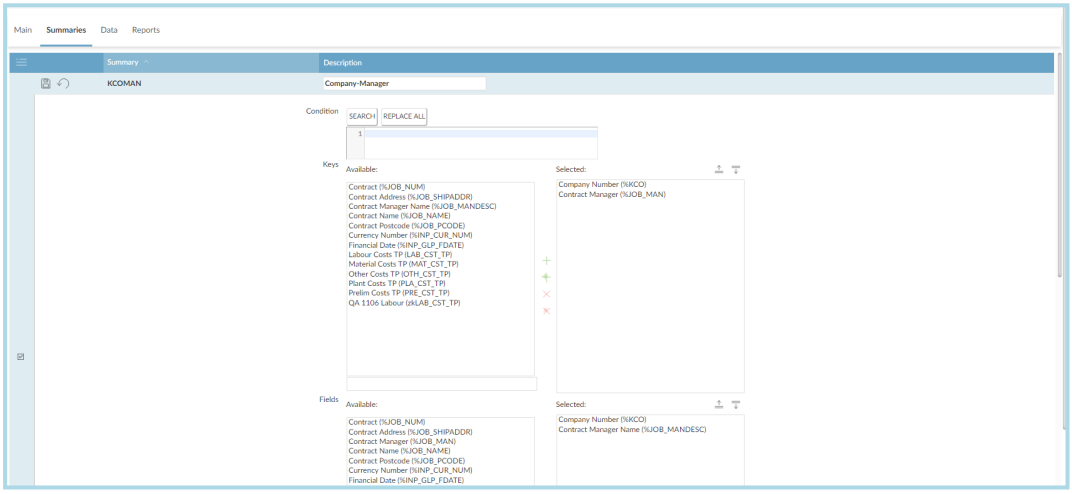
> Note: **You can restrict which summaries are displayed by setting the Sum Type drop-down to the appropriate setting**

Return to the Summaries Tab and click Add to create another summary level

Use the Summary name KCOMAN and Description Company-Manager

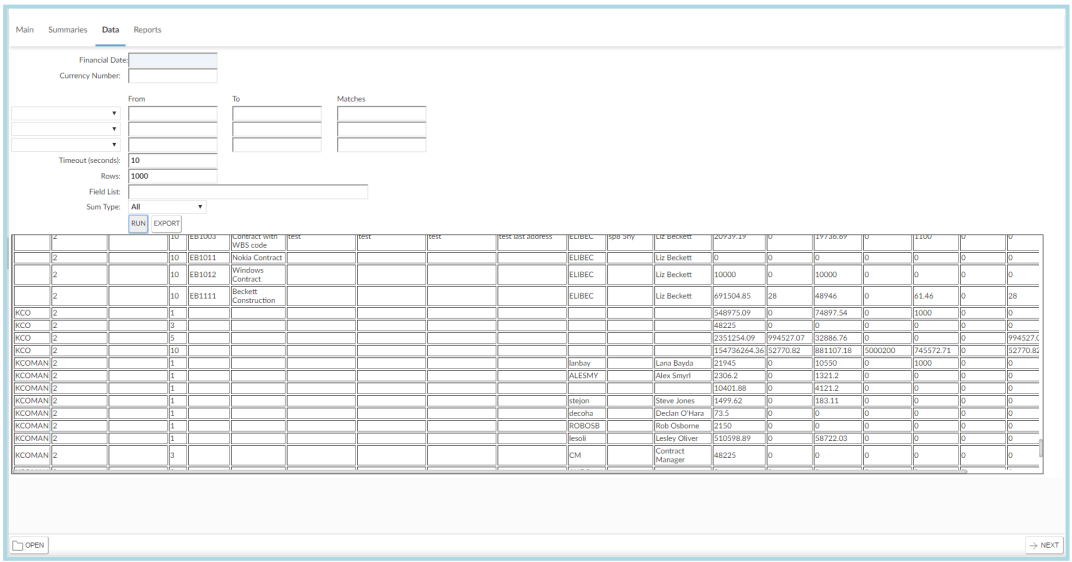
Set the Keys to Company Number (%KCO) and Contract Manager (%JOBMAN)

Set the fields to Company Number (%kCO) and Contract Manager Name (%JOB_MANDESC)



Click Save and then return to the Data Tab

Re-run the data and scroll to the last set of records



You should now see additional summary records with sumtype KCOMAN.

2.1 Using the summary data in a report

Within a report query, you can use the field sumtype to limit records to only those at your selected summary level.

For example:

Our dataset is NLEX1 so our query to report only on summarise manager records might be:

```
FOR EACH ttNLEX1 WHERE ttNLEX1.sumtype = 'KCOMAN'
```

To report on detail records only, and ignore the summaries, simply use a test for records where sumtype is blank:

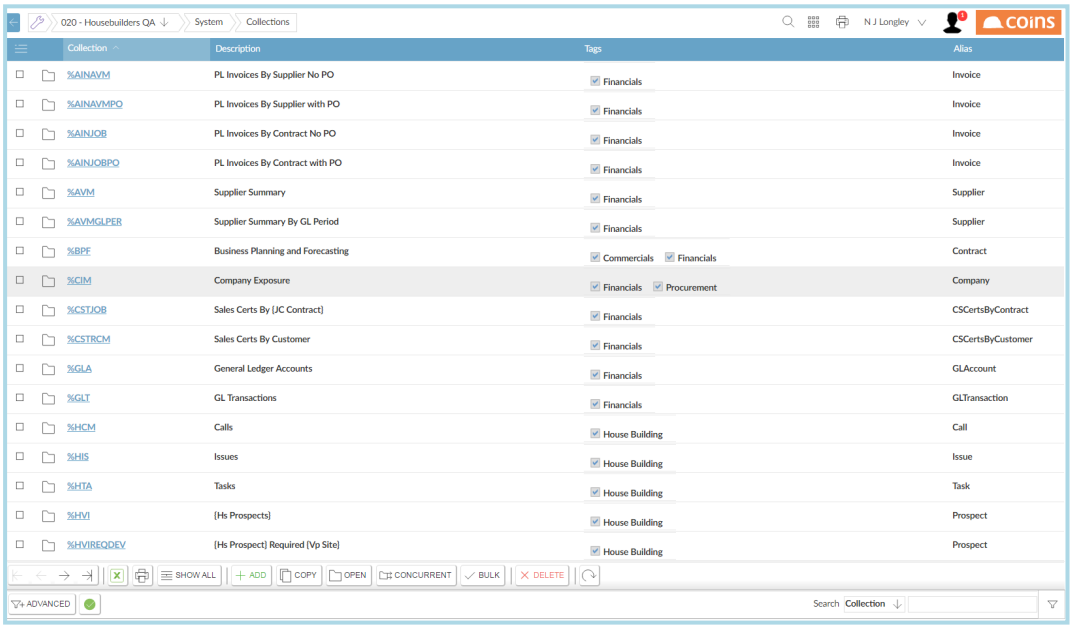
```
FOR EACH ttNLEX1 WHERE ttNLEX1.sumtype = ''
```

3 Exercise – Adding fields to a Collection

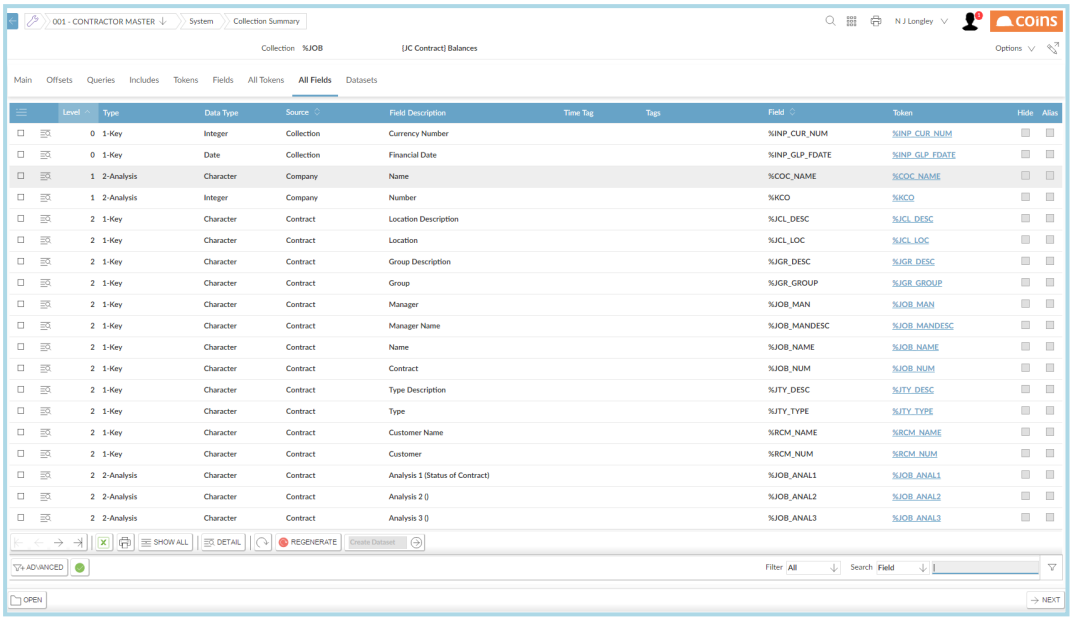
In this exercise we are going to add create some additional fields within the %JOB collection and add them to the dataset we created in Exercise 1

3.1 Add the fields

- Navigate to **OA Reporting and BI >Semantic Layer > Collections**



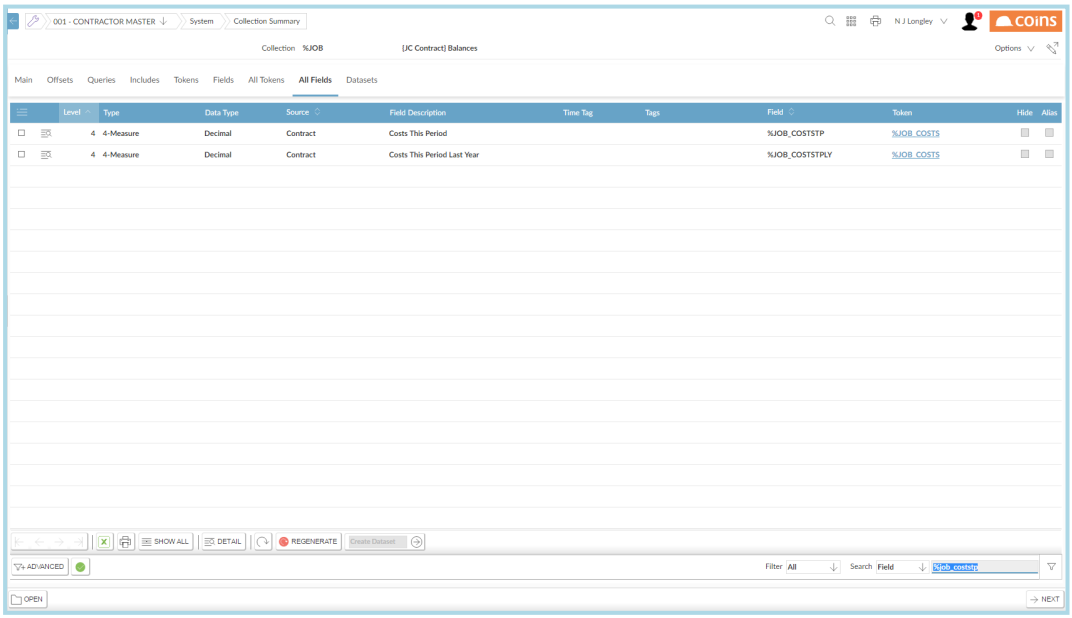
- Select the Hyperlink on the %JOB Collection and select the **All Fields** Tab



In our Dataset, we used the field Contract Costs This Period (%JOB_COSTSTP). However, we have been asked to also report on Costs last period, and the period before that. These were not available within the collection, so we need to add this functionality into the collection before we can add it to our dataset.

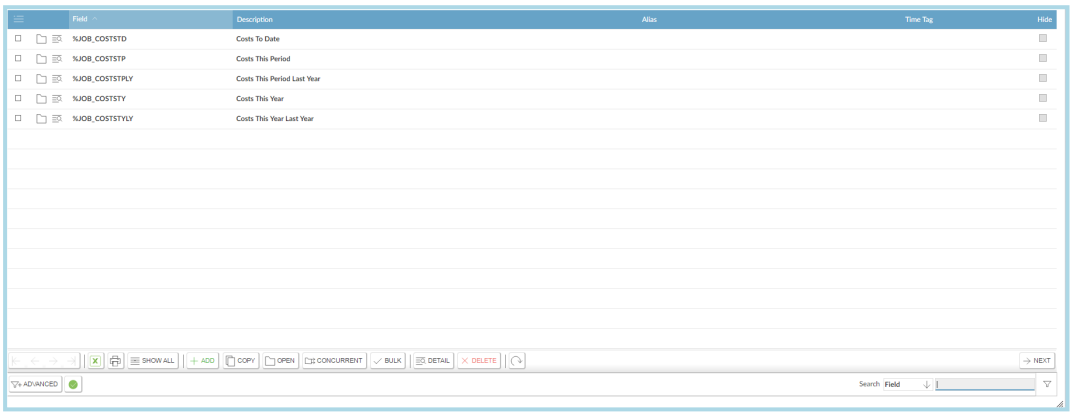
Since we already have a field looking at period costs, we can base our new fields on the existing one

- Set the Search Filter to Field and %JOB_COSTSTP

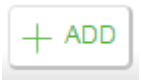


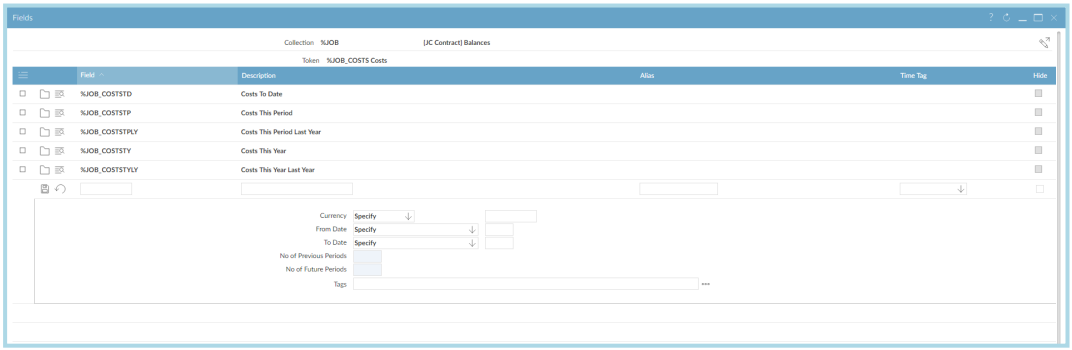
Against the field, you will see a column called Token. Tokens define the way data in a field is generated. Multiple fields may use the same token, but by altering some parameters, each can change the way in which they use it.

- Select the hyper link against the Token (%JOB_COSTS).



This screen lists the fields currently defined by this Token. As we can see, there are no fields defined that look one or two periods back from This Period.

Click 



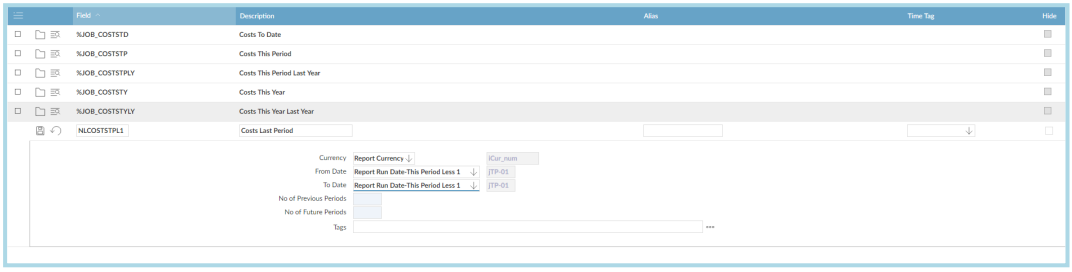
Specify a field name of xxCostsTPL1 (Where xx are your initials) and a description of Costs Last Period.

Set Currency to Report Currency

Set From Date to Report Run Date – This Period Less 1

Set To Date to Report Run Date – This Period Less 1

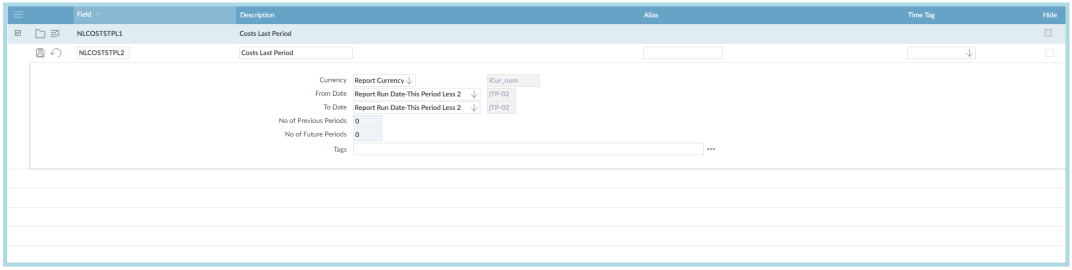
Previous and Future Periods should be set as 0 (Zero)



Click Save

Copy the field you have just created. Change its name to xxCostsTPL2 and its description to Costs This Period Less 2.

Amend the From and To dates to Report Run Date - This Period Less 2

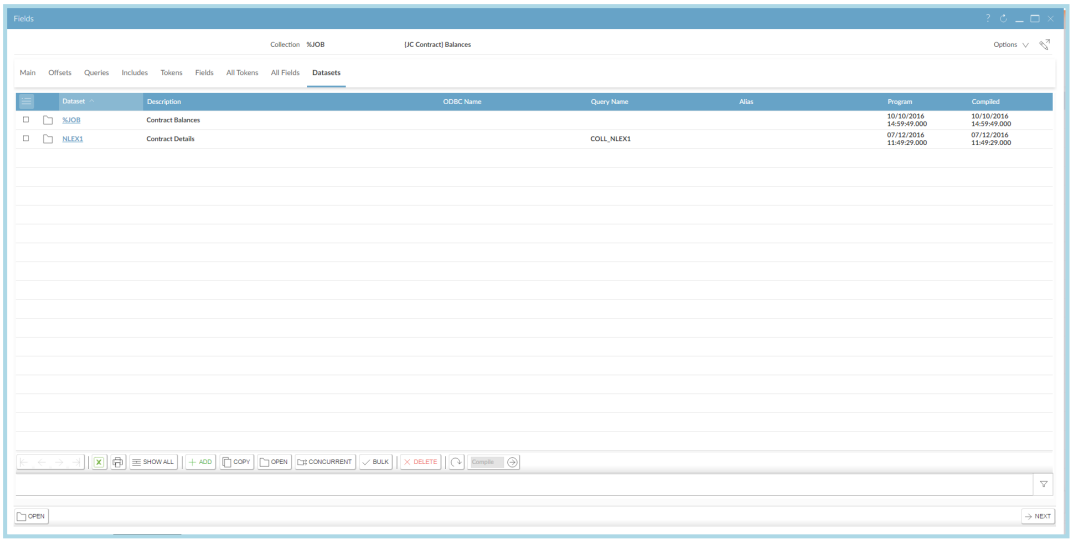


Click Save

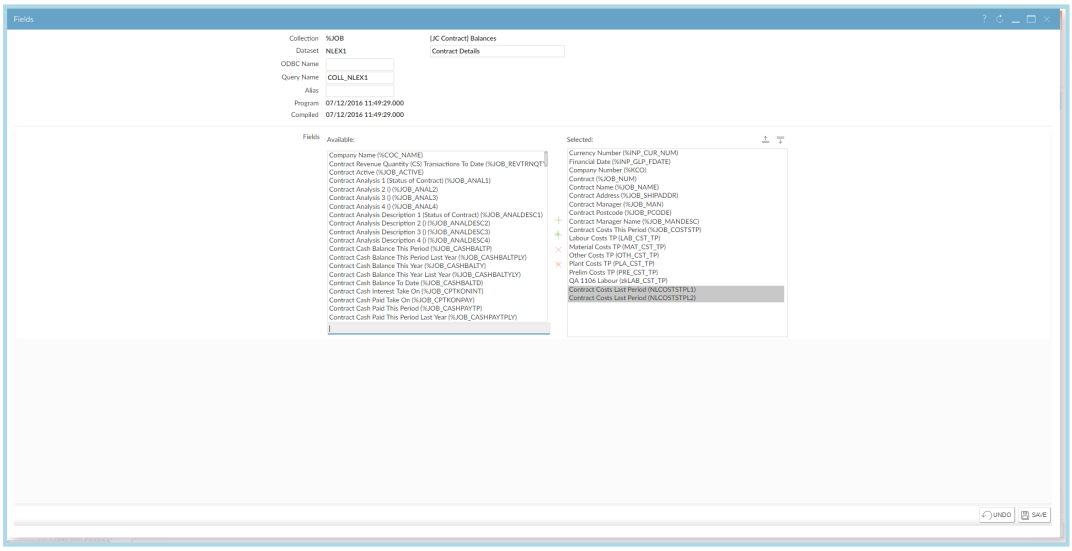
3.2 Add the fields to the Dataset

Once the fields are created in the collection, they are immediately available to selection in new or existing Datasets. In this exercise we will add them to our existing dataset xxEX1.

In Collection %JOB, navigate to the Datasets Tab



Open the Dataset xxEX1 and add your two new fields to the dataset



Click

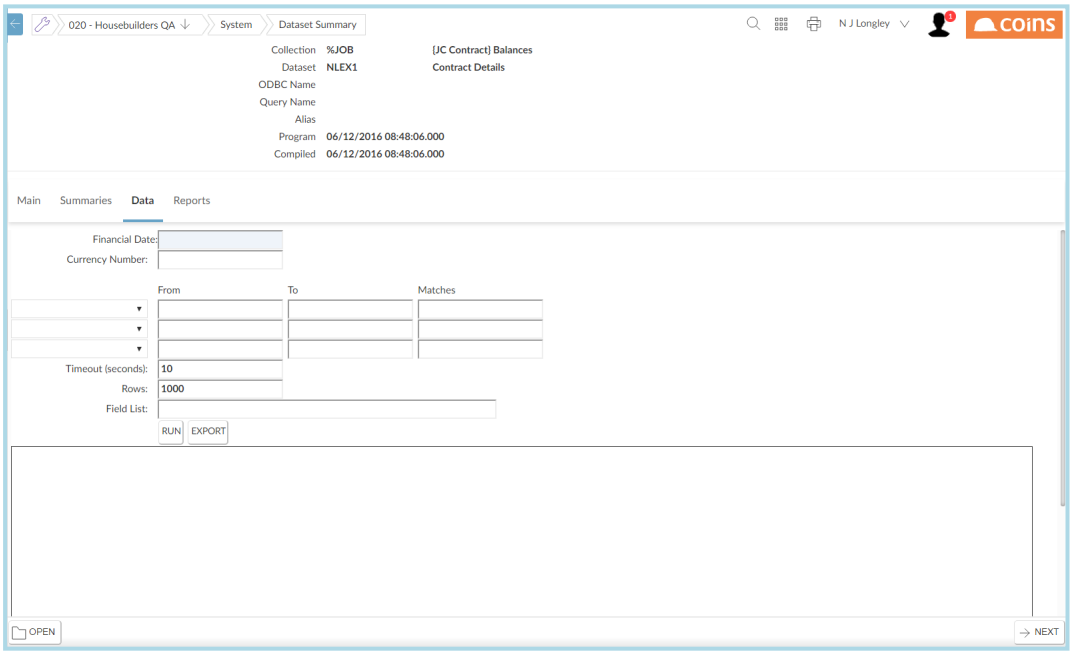
Check the Program and Compiled date and Time have updated

If these do not update, your changes will not be effective and you may need to seek assistance to identify why the compile did not take place. As checks are made at all stages of your changes, this should be a rare occurrence.

At this point, your dataset will have the new fields and any new reports based on this dataset will have them available for selection. Any existing reports based on this dataset will have the columns available for adding next time you edit the design but will not automatically have the columns added.

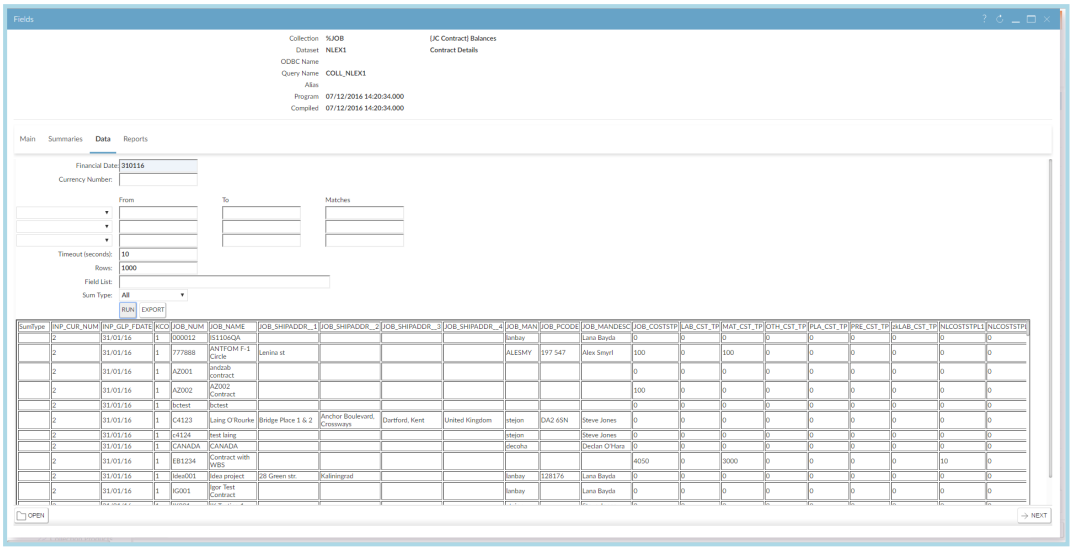
3.3 Test the Dataset

Select the Data tab



The coloured field indicates where a mandatory value is required – in this case it is the Financial Period on which we want to report. Enter a valid Financial Date and click Run

Your new fields should now appear on the output with the figures changing as appropriate.


Fields
Collection %JOB
Dataset NLEX1
ODBC Name
Query Name COLL_NLEX1
Alias
Program 07/12/2016 14:20:34.000
Compiled 07/12/2016 14:20:34.000
[JC Contract] Balances
Contract Details
Main
Summaries
Data
Reports
Financial Date: 310116
Currency Number:
From
To
Matches
Timeout (seconds): 10
Rows: 1000
Field List:
Sum Type: All
RUN
EXPORT
OPEN
NEXT

4 Exercise – Adding Calculated Fields to a Collection

In the last exercise, we created new fields based on a Token and modified parameters. In this exercise, we are going to create a number of fields using calculations to control their functionality. If performing this exercise, familiarity with either OA Designer, or with Excel formulas is very desirable because this exercise requires the entry of formulas.

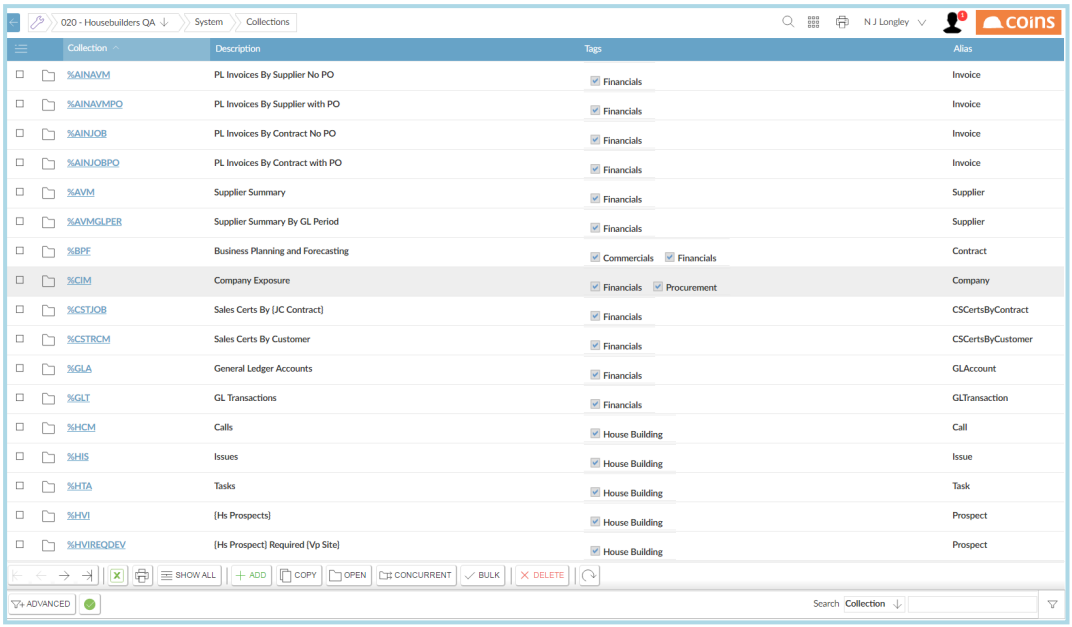
Please note that the calculations used are Progress Code and NOT the calculation syntax used elsewhere in the OA BI Toolset. Refer to Appendix of common formulas

4.1 Add the fields

Our dataset currently reports on Costs for each contract, but we now want to break the costs down to each costs category for the current period. The costs Token did not offer a parameter to do this so we need to make used of the Calculated Fields Tokens.

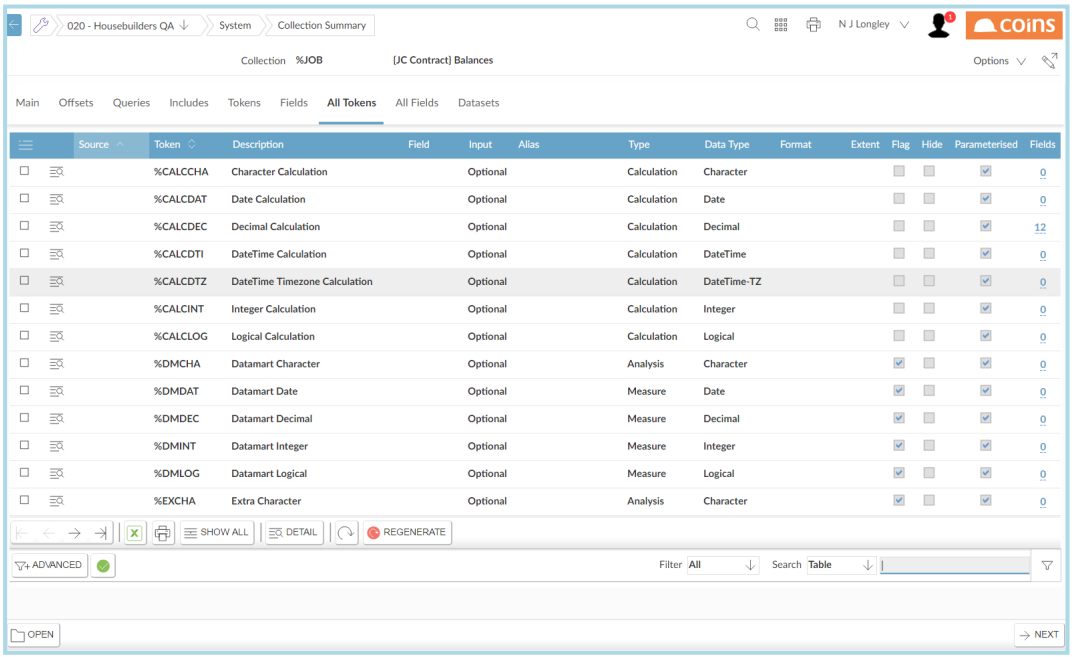
Navigate to the OA Reporting and BI module and select the Semantic Layer folder.

Select the Collections menu option.

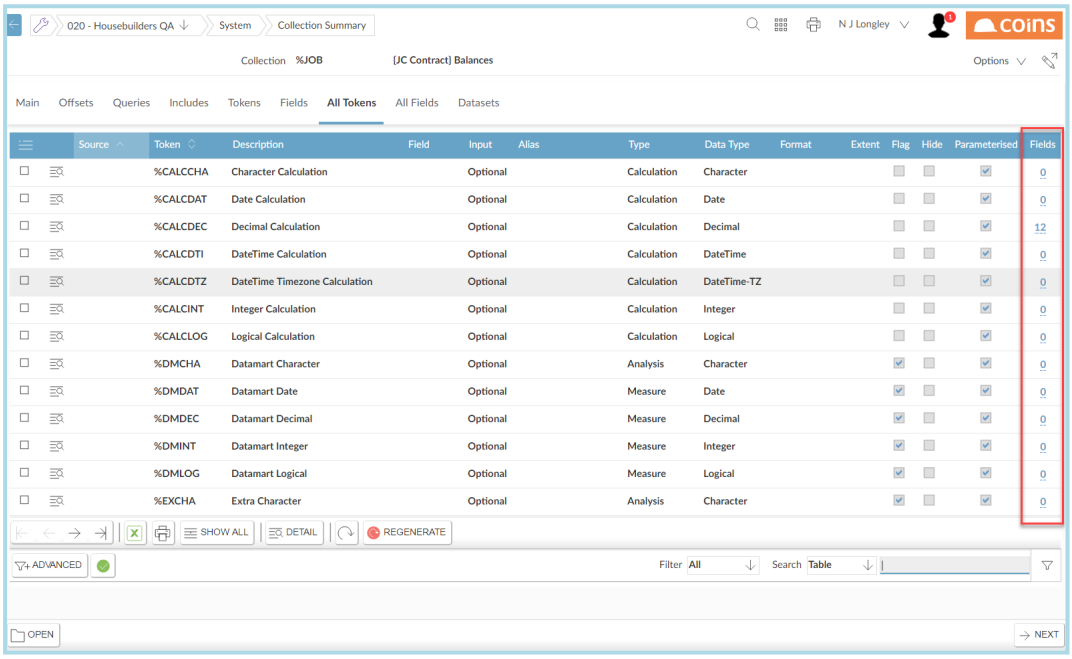


Select the hyperlink on the %JOB Collection and select the All Tokens Tab.

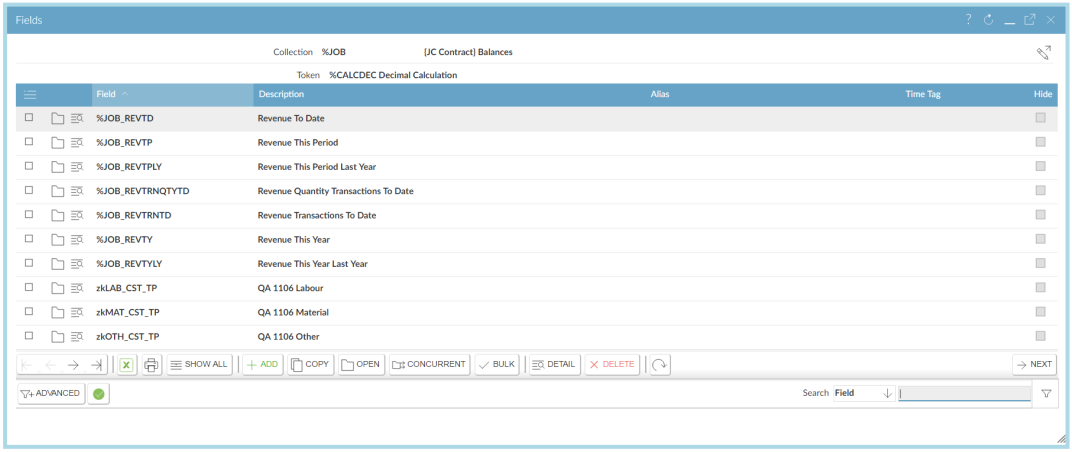
Set the Search filter to Token and search for *calc*



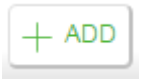
There are calculated field Tokens for each of the data types (Integer, Decimal, Character etc.). The Fields column on the far right indicates the number of fields that have been created against a token and provides a hyperlink to the field definitions.

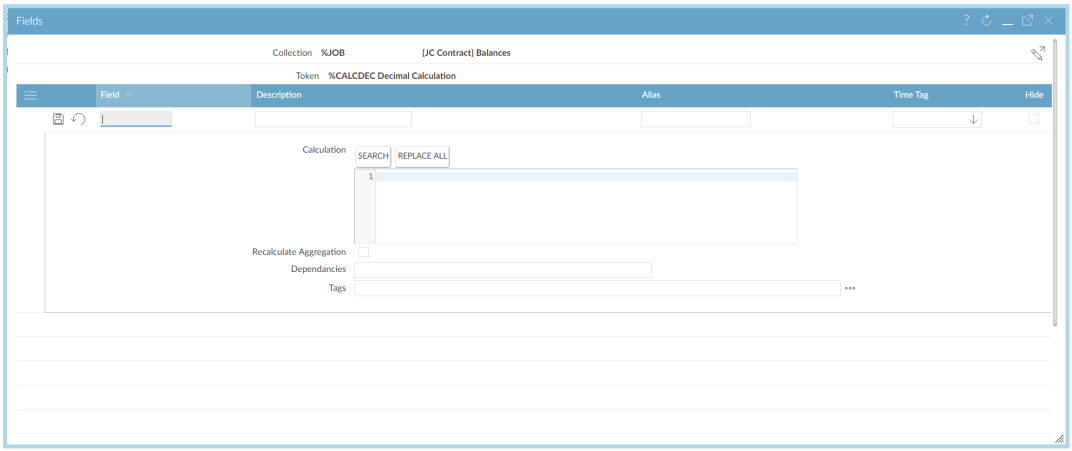


We are going to create fields containing cost figures so select the hyperlink for the fields against %CALCDEC.



The %JOB Collection contains links to Contract data and Cost Code data and we can reference this is our calculations.

Click 



Our first field is going to breakdown Labour Costs, so give the field a name (for example xxLAB_CST_TP where xx = your initials) and a description that will be meaningful to your users.

Our calculation needs to look at the Category code against each cost code and add up the costs to date if it matches 'L', (which is the category code for Labour in the COINS training database – your COINS system may use a different code). There is already a field in the Collection for accumulating Cost Code Costs for this period (%JCC_COSTSTP) so we can use this as the basis to accumulate our broken down costs

Our calculation (in Progress syntax) is as follows.

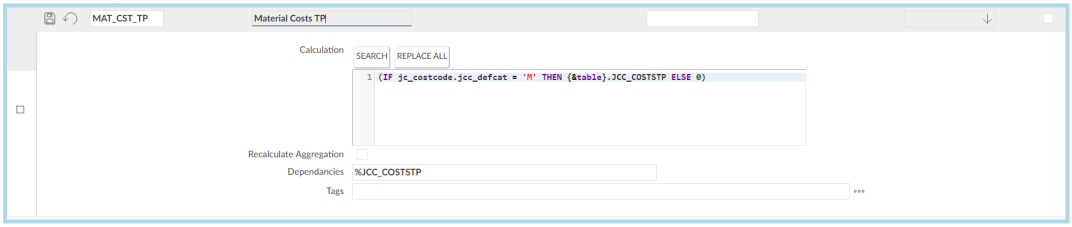
```
(IF jc_costcode.jcc_defcat = 'L' THEN {&table}.JCC_COSTSTP ELSE 0)
```

The calculation requires %JCC_COSTSTP in order to function, so we need to ensure that it is automatically added to any datasets. We can do this by adding an entry for %JCC_COSTSTP to the Dependencies field.

Click

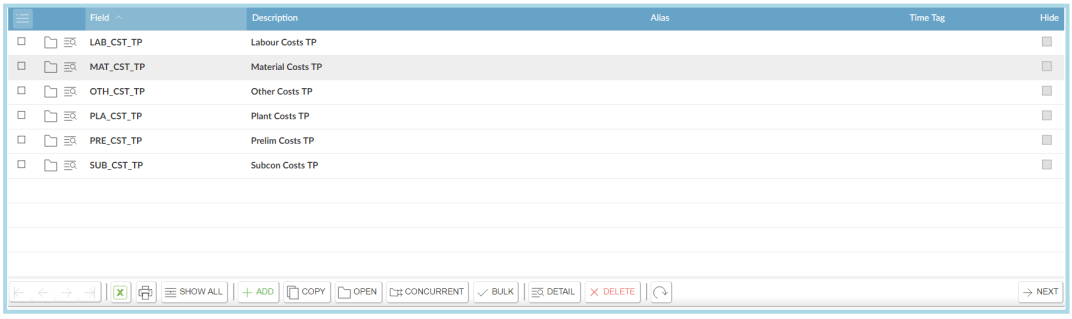
Copy the field and change its name to xxMAT_CST_TP with a description appropriate for Material Costs.

Change the Calculation to look for a Category code of M (Materials)



Click

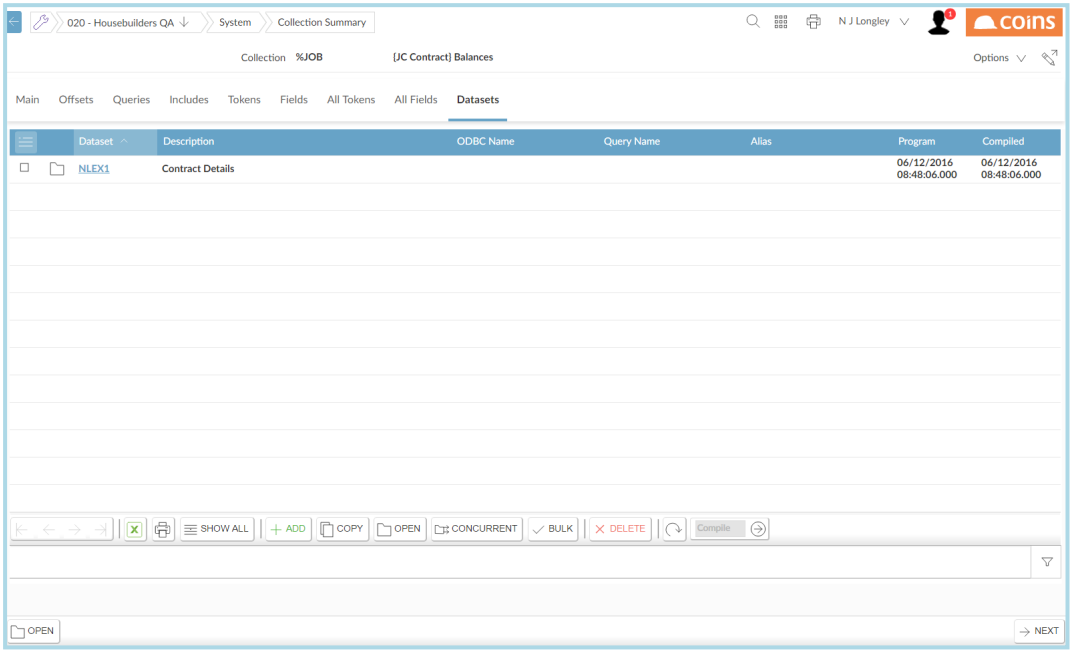
Repeat from step 11 for category codes A (Prelims), O (Other), P (Plant) and S (Subcon)



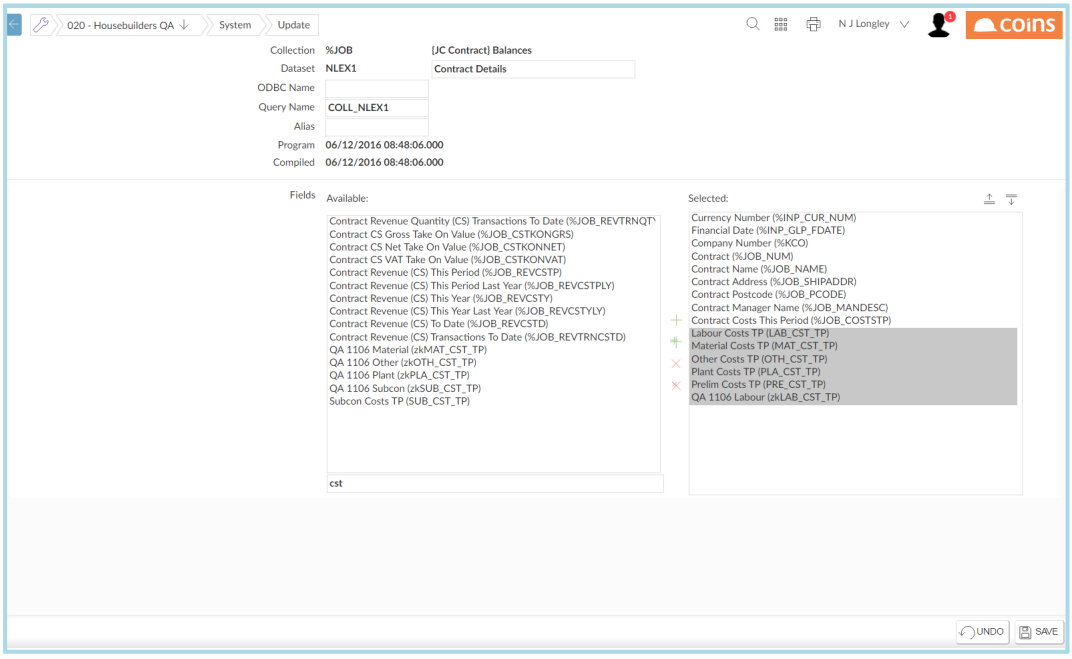
4.2 Add the fields to the Dataset

Once the fields are created in the collection, they are immediately available to selection in new or existing Datasets. In this exercise we will add them to our existing dataset xxEX1.

In Collection %JOB, navigate to the Datasets Tab



Open the Dataset xxEX1 and add your two new fields to the dataset



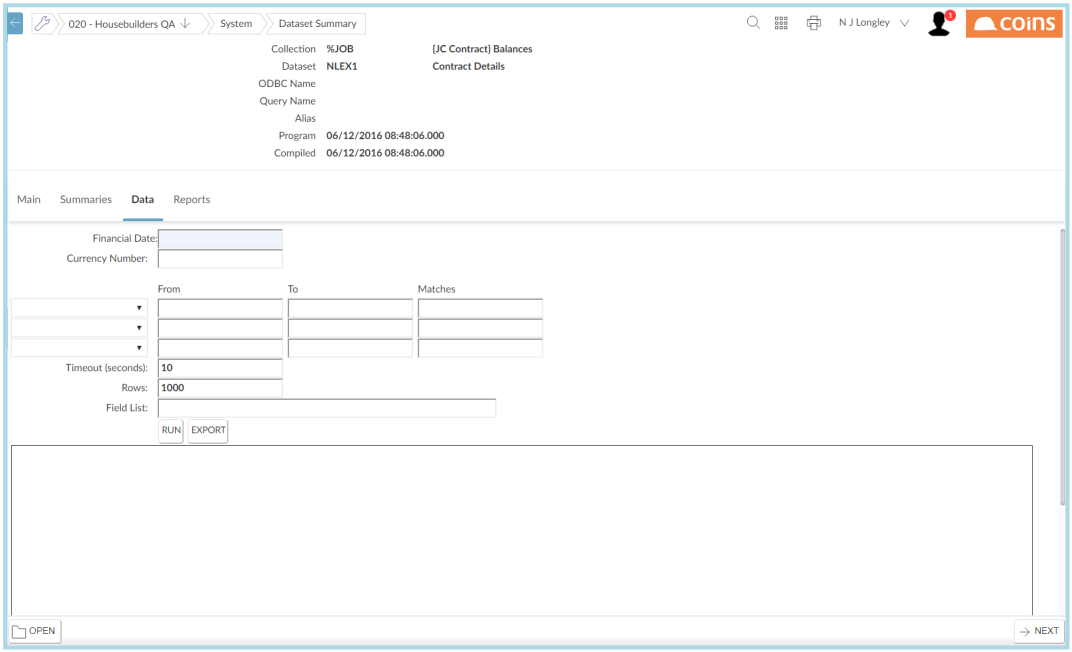
Click

Check the Program and Compiled date and Time have updated

At this point, your dataset will have the new fields and any new reports based on this dataset will have them available for selection. Any existing reports based on this dataset will have the columns available for adding next time you edit the design but will not automatically have the columns added.

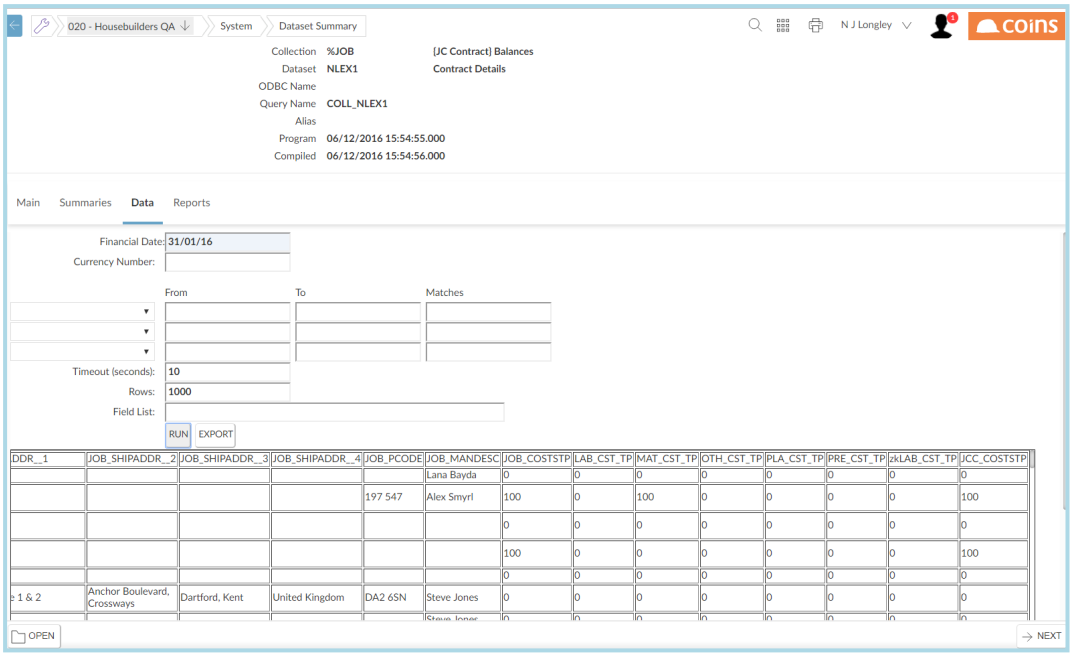
4.3 Test the Dataset

Select the Data tab



The coloured field indicates where a mandatory value is required – in this case it is the Financial Period on which we want to report. Enter a valid Financial Date and click Run

Your new fields should now appear on the output with the figures changing as appropriate.

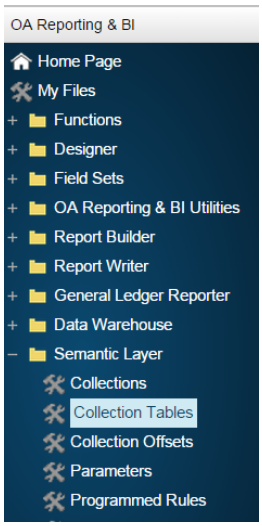

020 - Housebuilders QA
System
Dataset Summary
N J Longley
coins
Collection %JOB (JC Contract) Balances
Dataset NLEX1 Contract Details
ODBC Name
Query Name COLL_NLEX1
Alias
Program 06/12/2016 15:54:55.000
Compiled 06/12/2016 15:54:56.000
Main
Summaries
Data
Reports
Financial Date: 31/01/16
Currency Number:
From
To
Matches
Timeout (seconds): 10
Rows: 1000
Field List:
RUN
EXPORT
DDR__1
JOB_SHIPADDR__2
JOB_SHIPADDR__3
JOB_SHIPADDR__4
JOB_PCODE
JOB_MANDESC
JOB_COSTSTP
LAB_CST_TP
MAT_CST_TP
OTH_CST_TP
PLA_CST_TP
PRE_CST_TP
zkLAB_CST_TP
JCC_COSTSTP
Lana Bayda
197 547
Alex Smyrl
Anchor Boulevard, Crossways
Dartford, Kent
United Kingdom
DA2 6SN
Steve Jones
OPEN
NEXT

5 Exercise - Adding Fields to a Collection Table

In exercise 3 we added a field to a collection. It should be emphasised that only if the field is relative to another field, the value of which is not known until the collection; for instance a field which relies on the Financial Date (as in the previous examples), should it be created on the collection.

If the field is relative to the table only then it should be created on the table as a field. In this way it will be available to any collection that uses that table in the query. By creating a field on the collection it is only available to that collection.

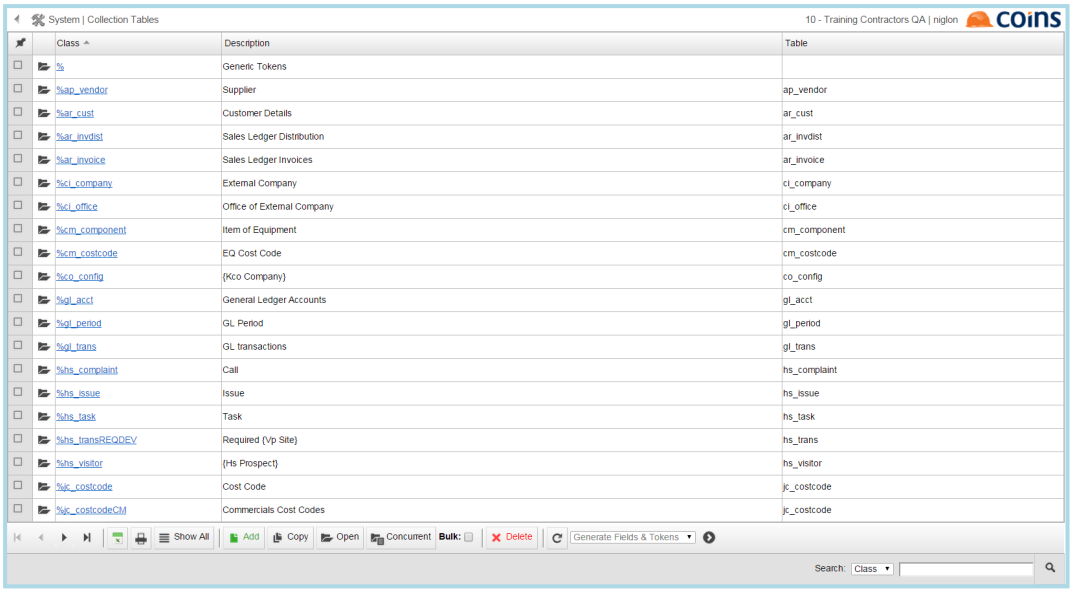
5.1 Add a new Token



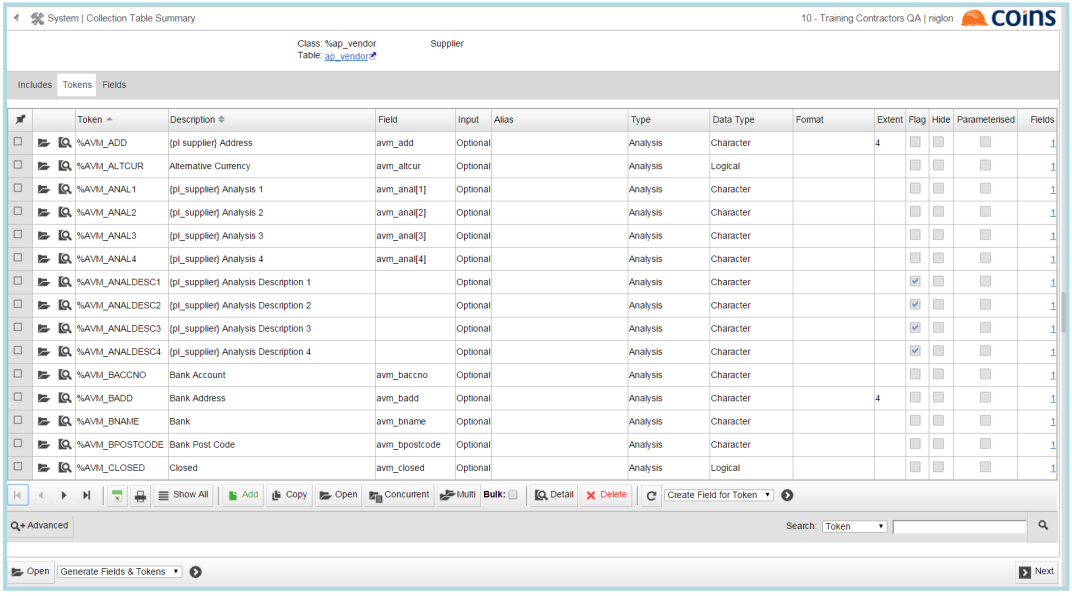
Similar to RO fields, Tokens are Progress code subroutines that collect data. For this exercise we are going to create a token to check the hold code on supplier records and if a supplier is on-hold, we are going to generate a field that will contain the text “ON-HOLD” that we can use in a report.

Navigate to the OA Reporting and BI module and select the Semantic Layer folder.

Select the Collection Tables menu option

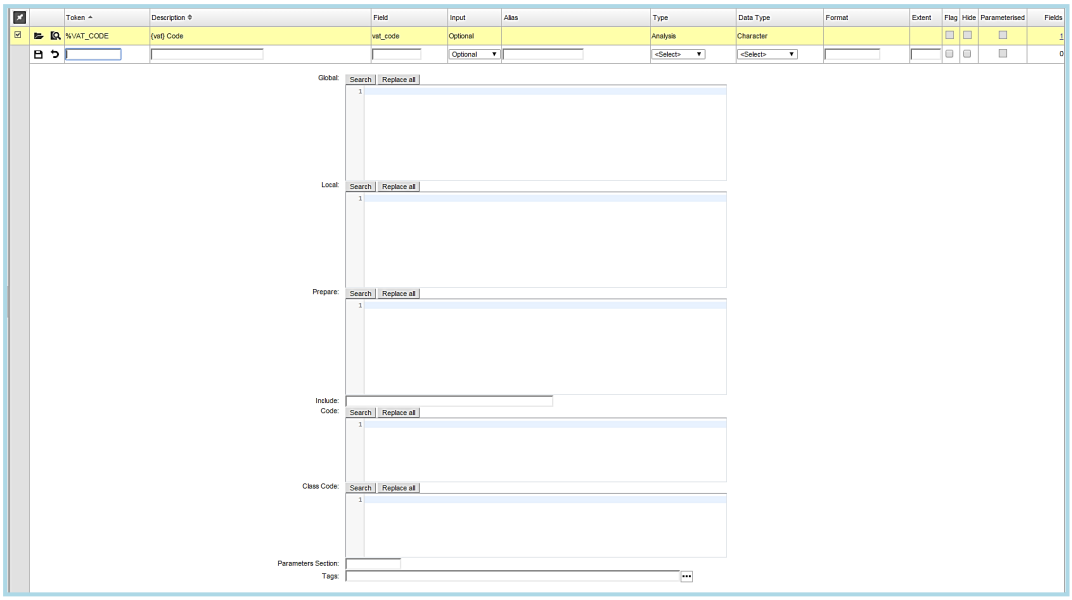


Select the hyperlink on the table %ap_vendor and select the Tokens tab.



If we look through the available Tokens, we can find %AVM_HOLD which has a single field that returns the value of the Hold field on the supplier record. This will be a Logical Y or N value. We want to create a Token that will take this Y or N value and create a field that will contain either blank or “ON-HOLD”

Click Add



Give the Token a name of HOLD_TEXT, do not prefix with % as this is not a standard Token and we do not want it overwritten in future updates from COINS. Token names should be named similarly to the fields they represent in the database.

The token name and description should mak it obvious to a designer what the token will do.

Add description of On Hold Report Text.

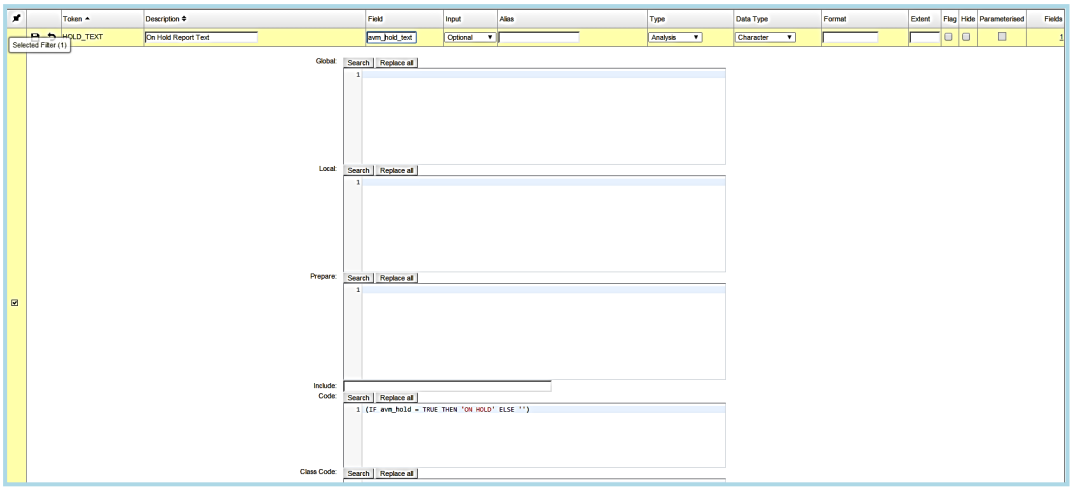
Add a field name of hold_text

Set Input to Optional

Set Type to Analysis, and Data Type to Character.

We now need to add some progress code that tells the Token how to generate field values. In the Code section add the code:

(IF avm_hold = TRUE THEN 'ON HOLD' ELSE '')



Click Save.

Select the new field and on the Action Dropdown select Generate Fields & Tokens and click Apply.

If there are any errors in the Progress code, these will be indicated in a dialog box. These errors will need to be corrected before the Token/field can be created. If there are no errors, the Token will be created and the Fields column will change from 0 to 1.

Navigate back to Collections and open the %AVM collection.

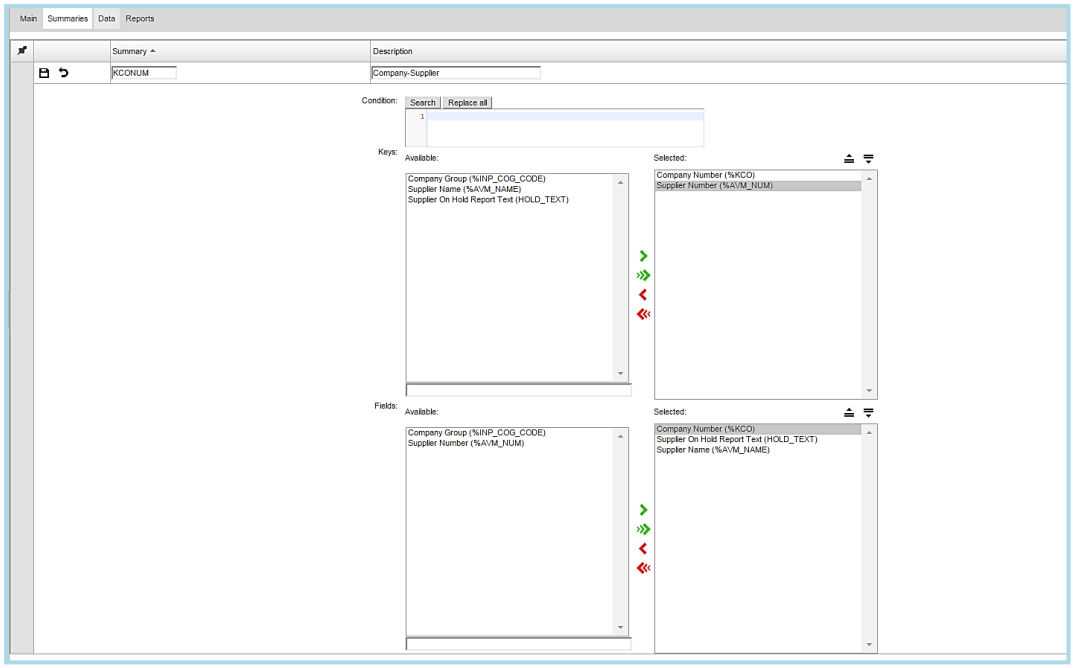
Create a new dataset called Exercise5xx where xx = your initials. E.g. Exercise5NL

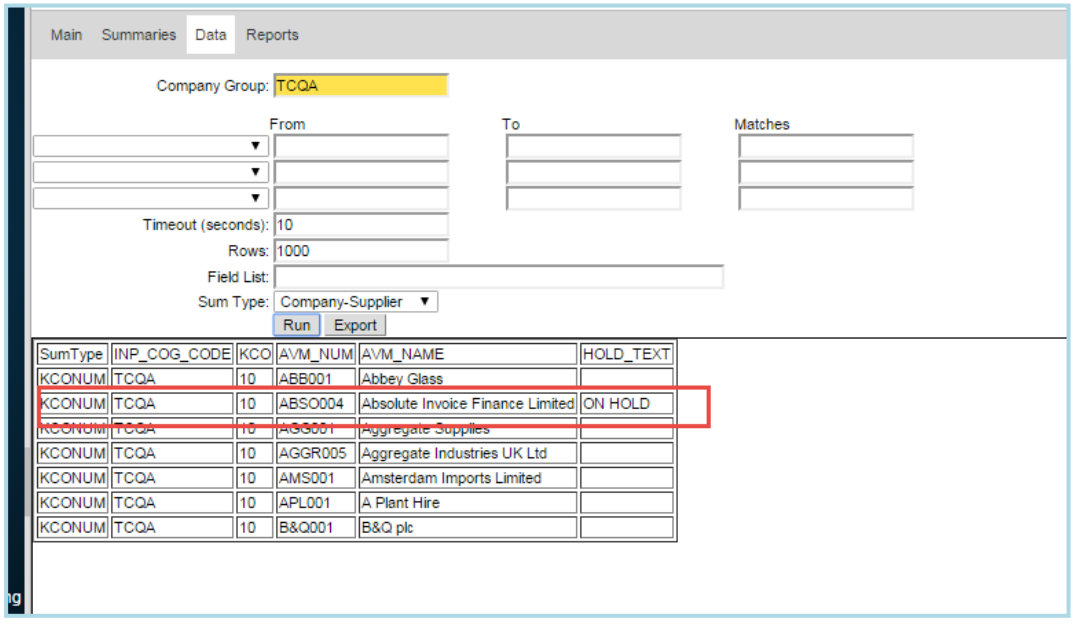
Open the Main Tab and add the fields for Company number (KCO), Supplier Number (%AVM_NUM), Supplier Name (%AVM_NAME) and Supplier On Hold Report Text (HOLD_TEXT)

Click Save

Create a Summary called KCONUM, with Keys of Company Number (%KCO) and Supplier Number (%AVM_NUM)

Add the fields for Company Number(%KCO), Supplier Name (%AVM_NAME) and Supplier On Hold Report Text (HOLD_TEXT)



On the Data Tab, enter the Company Group TCQA (this is the company group in the COINS training environment – you system will have different Company Group names)

Set the Sum Type to Company-Supplier and click Run