MainBoss Advanced 3.4, Update 1
Getting Started

(Read this first!)

<div align="center">

Introduction
**Welcome to MainBoss Advanced**

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This guide provides a quick introduction to principles of using MainBoss Advanced.

☐ For details of MainBoss set-up, see *Configuration Quick-Start* or the full *Configuration* guide

☐ For information about day-to-day use, see *Operations Quick-Start* or the full *Operations* guide

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This guide assumes that MainBoss has already been installed at your site. If you are the person who will install the software, see the *Installation and Administration Guide* before reading this *Getting Started* guide.

What You See

Here's a typical picture of the program's main window:
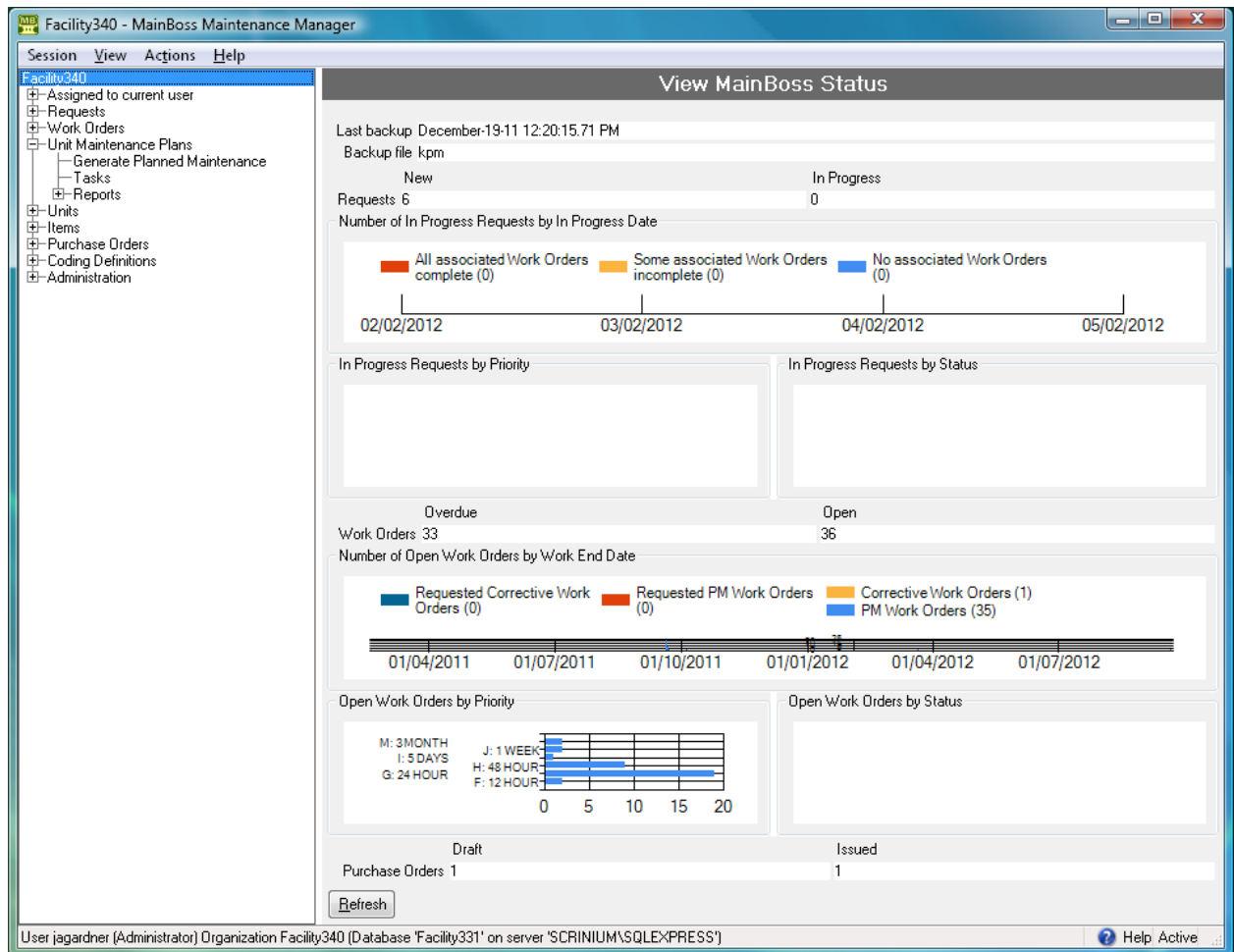
On the left is the *control panel*. This provides access to all standard actions and information. On the right, the **Refresh** button updates the information displayed (in case other users have recently made changes to your organization's data).

> **General Principle:** In MainBoss Advanced, you use the control panel (on the left) to go to a table, then you use the table's buttons (on the right) to do work.

This manual uses the notation **Entry** | **Subentry** to refer to items in the control panel. For example, **Work Orders** | **Reports** refers to **Reports** under the **Work Orders** entry in the control panel.

Whenever you select an entry in the control panel, the rest of the window changes to show information about what you selected. For example, if you click **Work Orders** in the panel, the right-hand part of the window changes to show information on work orders.

> We recommend that you maximize the main window so that MainBoss has the most possible screen-space to display information.

Keyboard Shortcuts: MainBoss allows standard Windows keyboard shortcuts such as **<Ctrl+C>** for copy and **<Ctrl+V>** for paste. You can also use **<Tab>** to move to the next field in a window; if you're filling out a form, you can just tab from one field to another rather than using the mouse. **<Shift+Tab>** moves backward to the previous field.

In any table viewer, the shortcut sequence **<Ctrl+F>** opens the search window. The search will be applied to whatever list of records you clicked most recently. For example, if you most recently clicked a list of unit records, **<Ctrl+F>** will let you search through units; however, if you were looking at a unit record and your most recent click was on the unit's list of service contracts, then **<Ctrl+F>** would search through service contracts. (**<Ctrl+F>** will not work if your most recent click was on the MainBoss control panel—it only works if your most recent click was in some sort of table viewer.)

If the search window is not open, the **<F3>** function key has the effect of **Find Next**, searching for whatever you searched for most recently. This means that pressing **<F3>** repeatedly will perform the same search over and over.

MainBoss buttons often allow keyboard shortcuts. To see the shortcuts in a window, press the **<Alt>** key. One letter of each button will be underlined, as in **Save**. Pressing **<Alt>** plus the underlined letter is equivalent to clicking the button, so that **<Alt+S>** is equivalent to clicking the **Save** button.

View Options: The **View** menu provides options that control how information is displayed:

☐ **Zoom in on View**: If you click this menu item, MainBoss will hide the control panel in this window. If you were looking at a table viewer, you will see an enlarged version of the **View** section (without any other of the table viewer's sections). If you were looking at a report window, you will see all sections of the window.

When you are zoomed in like this, **Zoom in on View** will be marked with a checkmark in the **View** menu. To zoom out again, click **Zoom in on View** again. This returns to the window's usual appearance.

☐ **Open in New Window**: If you select this option, MainBoss opens a new window containing the same information as the current one. This is useful if you want to compare information between tables: have two windows open, one showing one table and one showing the other.

☐ **Change Active Filter**: This item lets you change the definition of "active" requests, work orders and purchase orders. For example, you can specify that these records should only be displayed in table viewers if they're less than a year old. Changes that you make through this menu item affect you but not other users.

- **Show compact browsers**: If this is checkmarked, table viewers will not show details from the currently selected record. This makes it possible to show many more records in the table viewer window. If the entry is not checkmarked, table viewers will have an area showing the contents of the currectly selected record; this reduces the number of records that the window can show at any one time.

Getting Help

There are several ways to obtain online help while using MainBoss:

- Clicking the Help button at the bottom of the window displays information about the window currently on the screen.

- Pressing the **<F1>** function key provides the same information as the Help button.

- If you point the mouse to something on the screen, MainBoss displays a tooltip (a small yellow message) providing information about what you're pointing at. This is particularly useful if a button on the screen is currently disabled (i.e. grayed out). The tool-tip explains why the button isn't currently available.

- The MainBoss **Help** menu provides access to MainBoss's help files.

    - **Help** → **Contents** gives you the table of contents for the help files.
    - **Help** → **Help Index** gives you an index of important terms.

Tooltips

A tooltip is a small message that may appear if you point the cursor to something on your monitor screen. MainBoss uses tooltips to explain any situations that may be confusing.

For example, if you don't have appropriate security permissions, you may not be allowed to fill in certain information fields or to click certain buttons. In this case, pointing the cursor to the field or the button will produce a tooltip message explaining the situation (and telling what security roles you'd need in order to use the field or button).

Similarly, if you've filled in a field with an unacceptable value, MainBoss will display an error marker. Pointing the cursor to the error marker will display a tooltip explaining why the value is unacceptable. (For example, MainBoss may expect the field to contain a date rather than what you've typed in.)

> If you're ever confused about MainBoss's behavior, use the cursor to obtain tooltips. These should help you figure out what's happening.

Specifying Your MainBoss Database

The first time you start MainBoss, you must specify how to connect with your MainBoss database.

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☐ **To set up MainBoss so that it can access an existing database:**

1. Log in to the computer under your usual login name.

2. Start MainBoss on the new machine. It will display a window asking you to specify the maintenance organization (database):
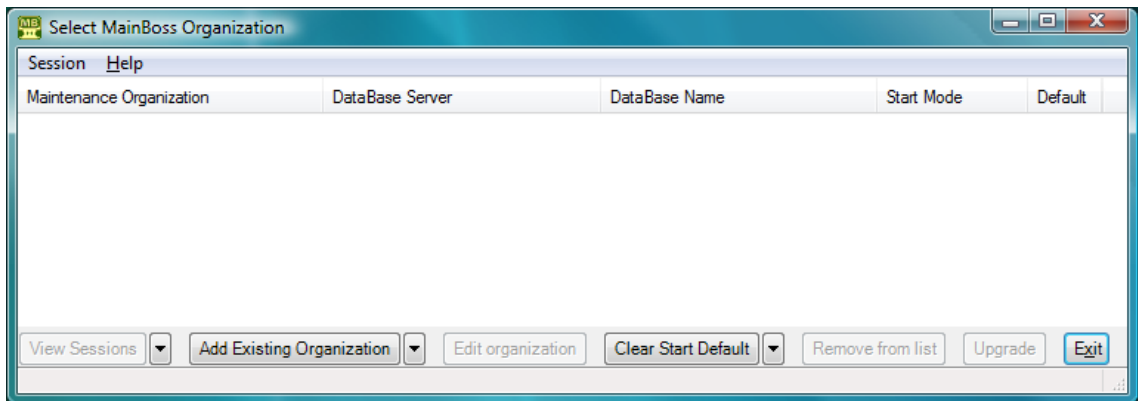

3. Click **Add Existing Organization**. This opens a window like this:
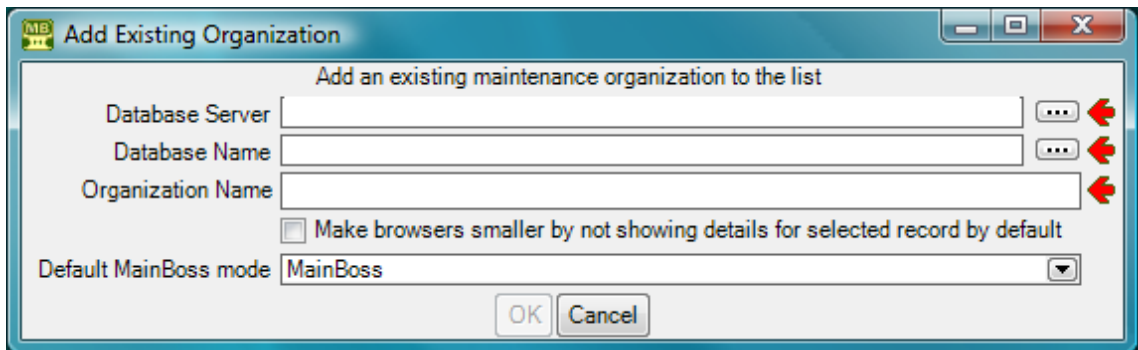
4. The person in charge of MainBoss at your site will tell you the values to specify for "**Database Server**" and "**Database Name**". In most cases, you can click the "..." buttons associated with these fields and select the appropriate values from the resulting lists. However, for technical reasons related to firewalls and SQL Server configuration, you may not find the values you want in the lists. In that case, you'll have to type in the values by hand.

5. Once you specify "**Database Server**" and "**Database Name**", "**Organization Name**" will be filled in with a value from the database. Usually, you should simply keep this name; however, you have the option of changing "**Organization Name**" if

you wish. What you enter will become your own private name for the organization—it will not affect other users.

6. Click **OK**. MainBoss will add the database name to the list. You'll see something like this:
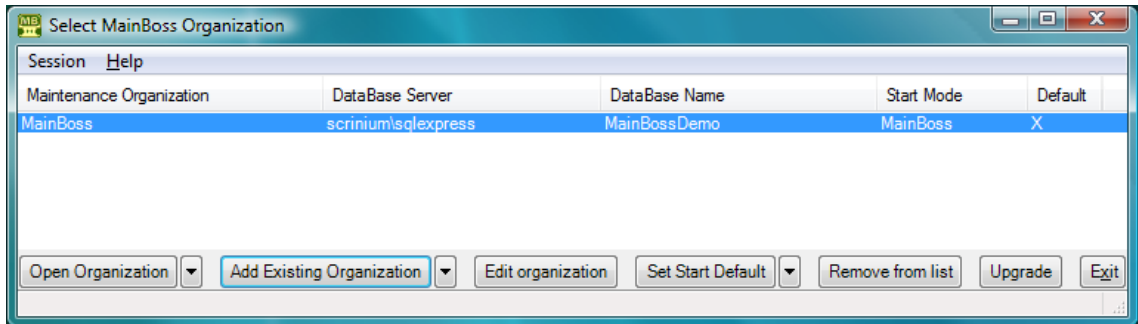
7. Click **Open Organization**.

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Once you have set up this computer to access the maintenance organization, you don't have to do it again. Every time you start MainBoss on this computer, it will automatically start working with the specified database.

Table Viewers

A table is a list of entries, each of which contains information about something. For example, the **Vendors** table is a list of your suppliers.

Each entry in a table is called a record. For example, each entry in the **Vendors** table gives information about one of your suppliers.

A table viewer lists the records in a particular table. For example, the **Vendors** table viewer lists the entries in your **Vendors** table.

Table viewers usually have two sections:

View: A list of normal records—this can be anything from work orders to information about spare parts.

Defaults: Default values for creating new records. For example, the default values in the **Vendors** viewer will be used whenever you create a new vendor record.
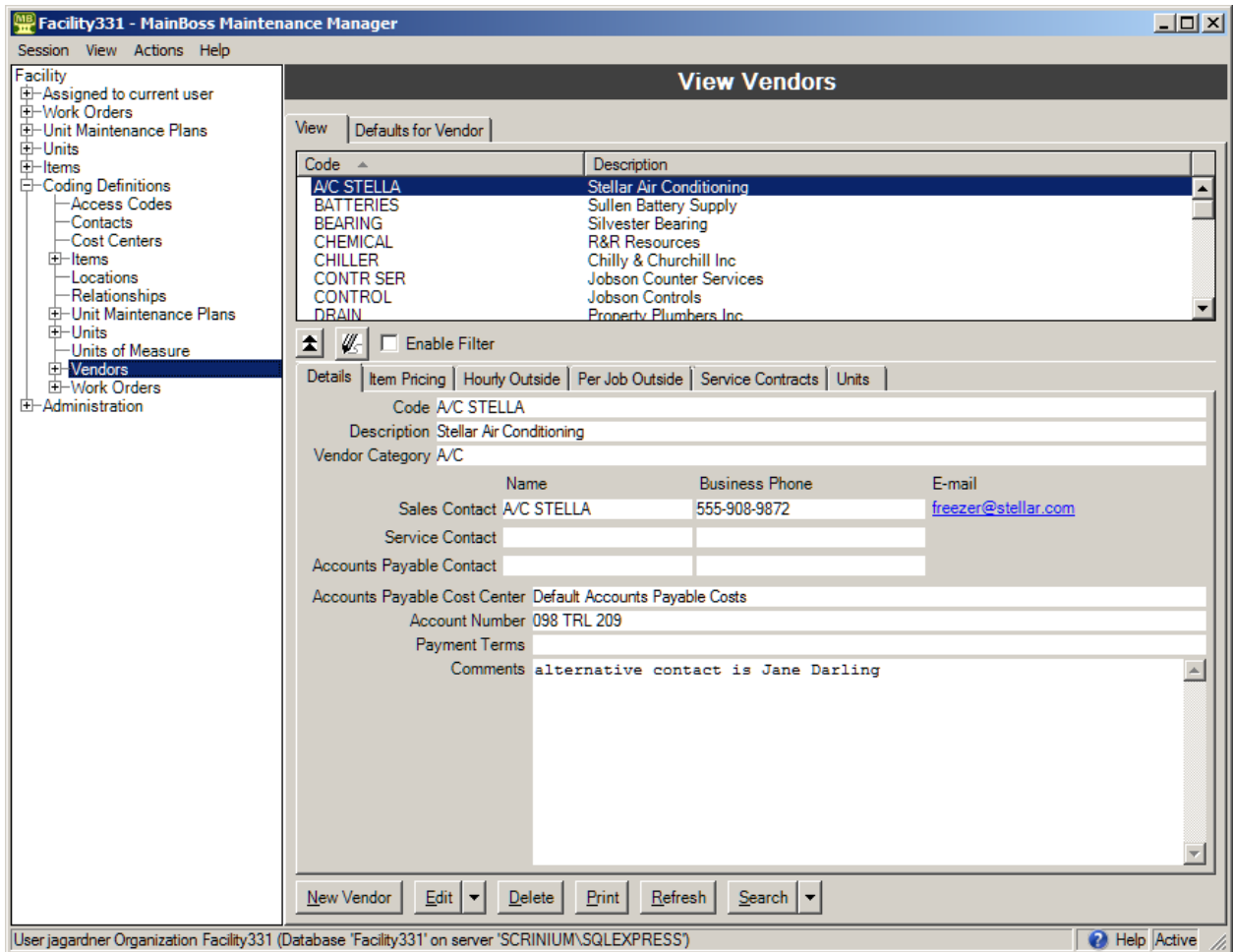
Hiding the Details for a Selected Record

By default, when you select a record in a table, the table viewer displays information from that record. Typically, this is shown in a *details panel* beneath the list of records in the table.

If your computer has a small monitor screen, you may decide that the details panel takes up too much room on the screen. If so, you can tell MainBoss not to display the details panel; you do this by clicking the following button:


When you click this button, the details panel disappears. The list of records can then use the space that was previously occupied by the panel.

If you want to see the details panel again, click the same button.

Active and All in Table Viewers

In the bottom right hand corner of most table viewers and editor windows, you'll see either `Active` or `All`:

☐ If the word is `Active`, lists of records displayed in the window only include *active* records. This means that the window only shows records that haven't been deleted. For requests, work orders, and purchase orders, it also means that it only shows records that are "recent". By default, a record is "recent" if it's less than 500 days old; your MainBoss administrator may change what counts as "recent."
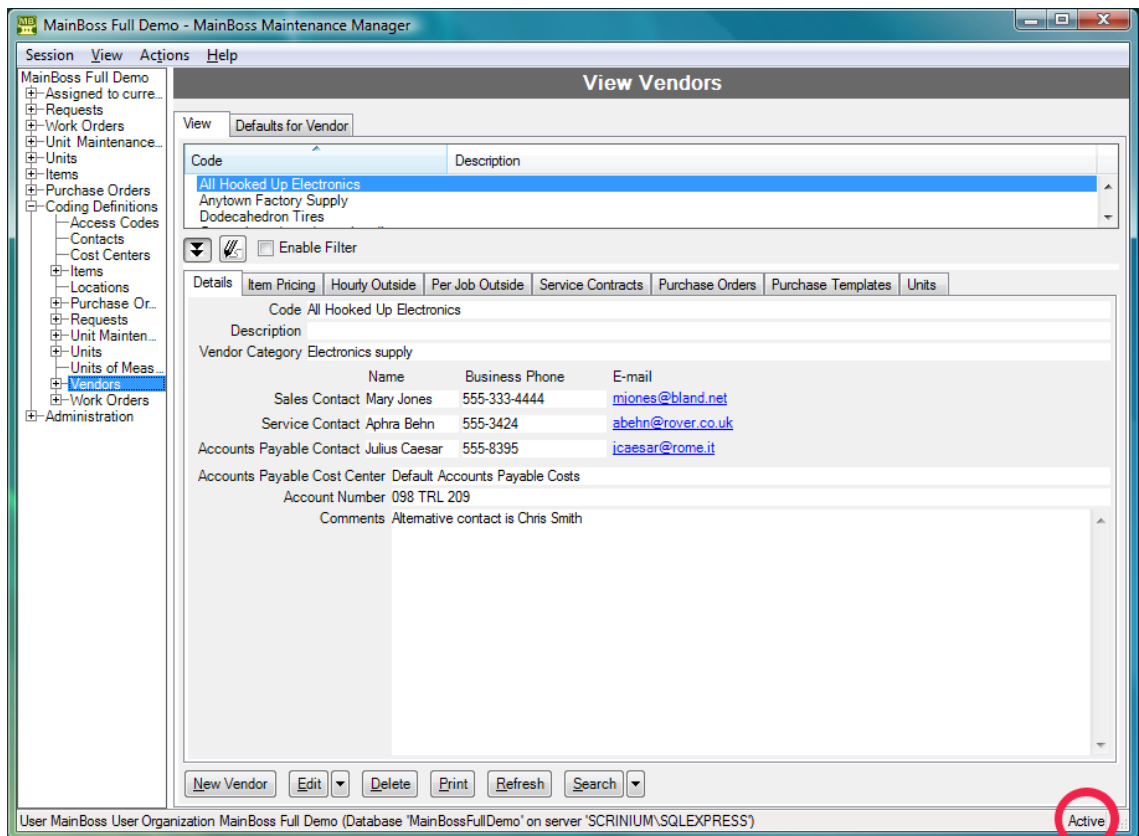
☐ If the word is `All`, the viewer is showing *all* records, no matter how old, including those that have been deleted. Deleted records are marked with a red X on the left. (Note that if you have many old records, MainBoss may take a considerable time to obtain them all from the database.)
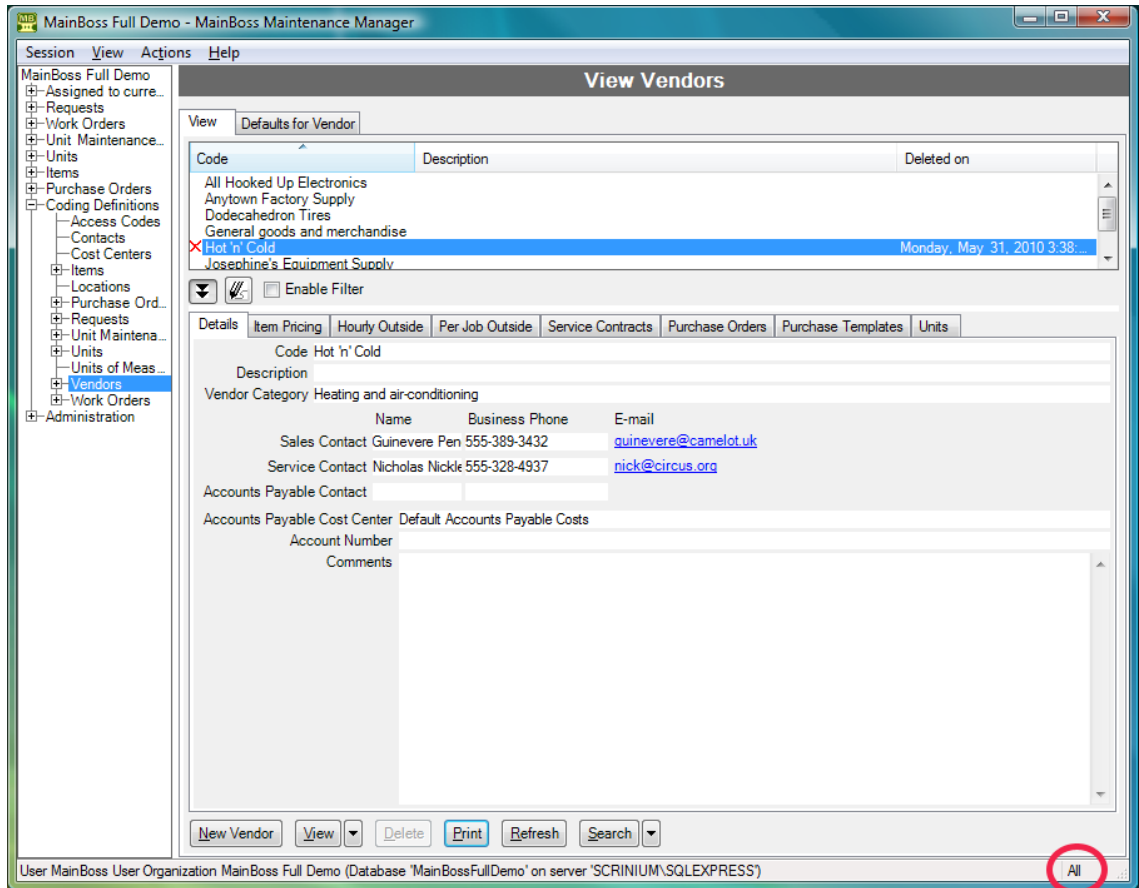
In most tables, MainBoss never completely erases deleted records. This makes it possible to maintain a complete audit trail of everything you do.

To switch from `Active` to `All` or vice versa, *double-click* the word. You'll see old and deleted records appear or disappear.

The **Restore** button lets you bring back a selected record. MainBoss opens a window where you can examine the record to be restored and make changes if necessary. When you save the record and close the window (typically by using **Save & Close**), the record will be restored to the active list.

Records That Refer to Deleted Information: When you delete a record, it's possible that other records still refer to it. For example, suppose a worker leaves your organization so you delete that person from your **Employees** list. That worker's name will still appear in old records (e.g. work orders that the person worked on).

MainBoss indicates that data comes from a deleted record by ~~striking out~~ the data. For example, if you delete Joe Smith's employee record, all work orders that refer to that person will show the name as ~~Joe Smith~~. This shows that the associated employee

record has been deleted (and will reduce your confusion when you can't find Joe Smith's name in your list of `Active` employees).

Table Filters

A *table filter* tells MainBoss to display a subset of all the records that are in a particular table. In this way, it "filters out" records that you don't want to see.

For example, suppose you want to see which jobs are scheduled to begin today. You could set up a filter on the **Work Orders** table saying that you only want to see work orders whose "**Work Start Date**" is today. MainBoss would then filter out any work orders that started on some other day, so that the table viewer only displays work orders starting today.

As another example, suppose you only want to see information on units in your HVAC system. You could set up a filter on the **Units** table saying that you only want to see work orders whose "**System**" is HVAC. MainBoss would then filter out non-HVAC unit records, so that the table viewer only displays HVAC units.

You can specify a filter in any table viewer. To do so, click the filter set-up button beneath the table's list of records:

This opens a window similar to the one used to search for individual records. Use this window to specify which records you want to see. For example, suppose you're in the **Items** window and you specify
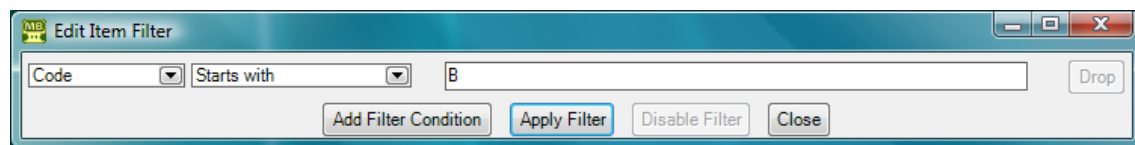
This indicates that you only want MainBoss to display item records whose "**Code**" field starts with the letter B. Once you enter this information, click the **Apply Filter** button. You'll see that the table viewer changes so that it only shows records that match what you've specified. If you **Close** the filter window, the table remains filtered. To return to the table's usual state, blank out the checkbox labeled **Apply Filter**.

On every table viewer, there is a checkbox labeled **Apply Filter**. If this box is blank, the table is unfiltered—you see everything you'd usually see. If you checkmark the box, the table will be filtered using the filter that is currently defined. By blanking or checkmarking the box, you can switch back and forth between filtered and unfiltered displays.

Selecting Multiple Table Entries

A table viewer lets you select multiple records from the table. To do this, you use the standard Windows conventions:

☐ If you hold down the **\<Shift\>** key, click on one record, then click on another, you will select both records and all the records in between.

☐ If you hold down the **\<Ctrl\>** key and click on a record, you select that record. If you hold down **\<Ctrl\>** and click a different record, you select that record and the first record stays selected. In this way, you can use **\<Ctrl+Click\>** to select any number of separate records.

After you select multiple records, you can perform the following operations:

Delete: Deletes the selected records. A window will open to ask if you really want to delete those records.

Edit: Opens the first selected record in an editor window. This window offers you all the features available in a normal editor window for this type of record. In addition, it has a **Next** button; if you click **Next**, MainBoss closes the current window and opens one where you can edit the next record that you selected from the table viewer. By repeatedly clicking **Next**, you can move through the records that you selected, editing each one as you wish.

If you use the editor window to change the contents of a record, the **Next** button disappears until you click **Save** (to save your changes) or **Cancel** (to cancel the changes). You will not be able to go to the next record until you save or cancel your changes.

Next is a drop-down button with the following entries:

Previous: Closes the current window and opens an editor window to edit the previous record from the list of selected records. By using **Next** and **Previous**, you can go forward and backward through the list of selected records.

Close: Closes the current window and goes back to the table viewer. This says that you are finished using **Next** and **Previous** to edit the selected records.

Cancel: Works like the usual **Cancel** button, canceling any changes you have made.

View: Works exactly like **Edit** except that you can only look at the contents of the selected records, not make changes. You can use **Next** and **Previous** buttons to go forward and backward through the list of selected records.

Restore: Is only enabled if the records you have selected are all currently deleted. If so, MainBoss opens an editor window that works exactly like **Edit**. If you **Save**

the current record, it will be restored. You can use **Next** and **Previous** to move forward and backward through the list of selected records.

> **Right-Clicking:** When looking at a multi-selection list, you can right-click on the list to get a menu of useful actions that can be performed. For example, the menu gives you the option of checkmarking all the entries in the list or blanking them out. With long lists, we recommend that you click the "..." button to get a selection window, then right-click on the list in the window to select the entries you want.

Editors

An editor is a window where you can enter information. Most editor windows have a **Details** section where you can enter basic information; many editor windows have more sections for additional information.

☐ Mandatory fields are marked with a red arrow until they're filled in. You can't save the record until you specify values for those fields. (In the picture below, "**Subject**" and "**Unit**" are mandatory.)

☐ Read-only fields can't be changed. They can be recognized because they are *not* surrounded by a black border line. In the picture above, several fields are read-only.

For example, the fields in the "**Current**" line and "**Business Phone**" are all read-only.

☐ Some fields can only be edited at certain times. For example, some fields on a purchase order can't be changed once the purchase order is issued—issuing the purchase order implies that the purchase order is ready to be sent to the supplier, at which point, some information is considered "unchangeable". (Actually, some of this information *can* be changed, but you have to withdraw the purchase order before you're allowed to make the change.)

MainBoss also prevents you from changing information that has already generated accounting records—for the sake of security, accounting records can't be changed or deleted. For example, when you record the use of materials in connection with a work order, MainBoss generates accounting records indicating the cost of those materials. You can't directly edit this information once the accounting records have been written; if necessary, you must create a *correction*, which will generate a *new* accounting record to correct any mistakes in an old one.

☐ As shown above, editor windows have several buttons containing the word **Save**:

Save: Just saves information you've entered.

Save & Close: Saves the information and closes the window.

Save & New: Saves the information and starts a new record. This lets you create one record after another; for example, if you're recording contact information for people, you can **Save & New** after each person, which saves what you've just entered and starts a record for someone else. (Fields in the new record are initialized with default values as set in the **Defaults** section of the appropriate table viewer.)

Save & Print: Saves the information and opens a window that will let you print the record you've just created.

> **General Tip:** When you're filling out a record, if you don't know what value a field should have, leave it blank. Filling in dubious values will cause confusion down the line, and finding values that need to be changed can be difficult. If MainBoss really needs a field to be filled in, it uses the red arrow to make the field as mandatory.

Drop-Down Lists (Pickers)

Editor windows often specify information using *drop-down lists*, also known as *pickers*. For example, the "**Requestor**" field in a work request editor is a drop-down list:

As shown above, a drop-down list ends with three symbols:

The left-most arrow displays a list of available values for the field. In the case of "**Requestor**" this will be a list of the people whom you've authorized to submit work requests.

Requestor		
Name ▲	**Business Phone**	
Alex Miraculacci	555-839-0289	
Allison Matrix	555-098-9872	
Andrew Alberts	555-972-9873	
Coach Charlie	555-783-9872	
Floyd Pump	555-893-9830	
Gary Neller	555-783-9723	
George Jasper	555-039-9087	
Henry Tallboat	555-987-9723	
Holly Happy	555-902-8723	
Jackie James	555-098-2789	
Jackie Newlywed	555-892-9728	
Jane Leighbold	555-789-9872	
Janice Freidelburg	555-980-9873	
Jean Martin		
John Livingston	555-238-9872	
Jonny Spot	555-893-9872	
Karen Krystal	555-972-9287	
Marylee Chef		
Mike Mitchell	555-890-9728	
Nancy-Jean Beltree	555-897-2987	

 The "..." opens a window showing the complete table. For example, if you click the "..." for "**Requestor**", you get the **Requestors** table. Click an entry in the table, then click **Select** to fill in the original field.
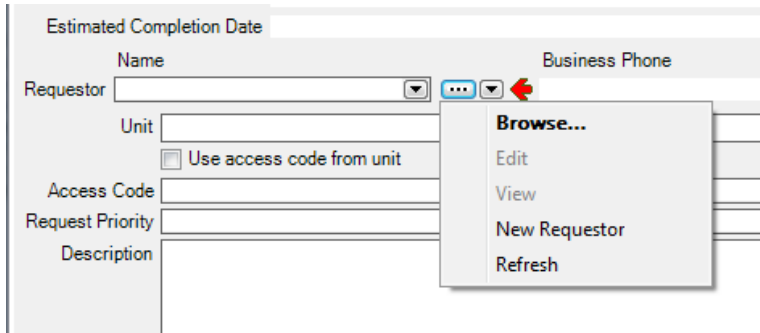
Select Requestor

Name ▲	Business Phone	Mobile Phone
Alex Miraculacci	555-839-0289	555-835-5411
Allison Matrix	555-098-9872	
Andrew Alberts	555-972-9873	
Coach Charlie	555-783-9872	
Floyd Pump	555-893-9830	
Gary Neller	555-783-9723	
George Jasper	555-039-9087	
Henry Tallboat	555-987-9723	
Holly Happy	555-902-8723	555-902-4511
Jackie James	555-098-2789	
Jackie Newlywed	555-892-9728	
Jane Leighbold	555-789-9872	

☐ Enable Filter

New Requestor | Edit ▼ | Delete | Print | Refresh | Search ▼ | Select | Cancel

Help | Active

☐ The right-most arrow of the drop-down list opens a menu that gives you a number of options. For example, if you click this arrow for the "**Requestor**" field, you'll see the following:


Browse lets you look at the existing **Requestors** table, just like the "..." button. **Edit** lets you edit the selected requestor record, while **View** lets you look at the record (but not change it). **New Requestor** lets you create a new requestor record; if you do this, the requestor will be filled into the original "**Requestor**" field once you save and close the new record. This makes it easy to create new records as needed if you don't already have an appropriate record. **Refresh** lets you update the drop-down list of **Requestors** to show any changes since you first opened the current window.

If you want to delete (clear) the value that's currently shown in this kind of field, right-click on the field itself and choose **Clear**. (With drop-down lists, the **Clear** option only shows up in non-mandatory fields; you can't clear the value of a mandatory drop-down list once it's been given a value, although you can give the field a different value.)
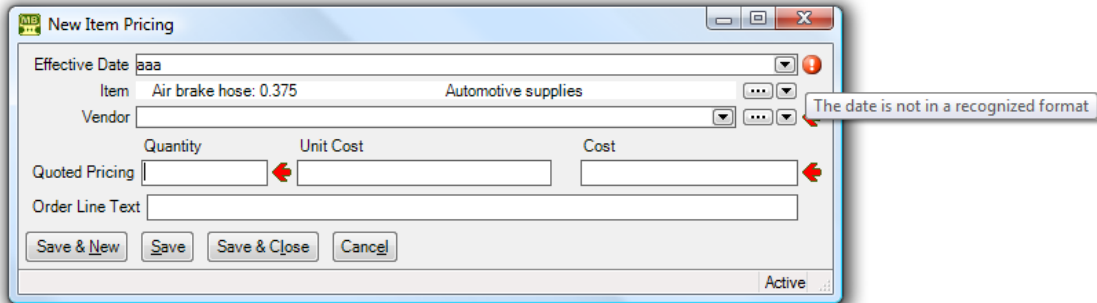
Errors

MainBoss puts a marker beside data fields that contain invalid data. The error marker is a red circle containing a white exclamation point. This is shown below, where the "**Effective Date**" field should contain a date, but instead contains meaningless text:
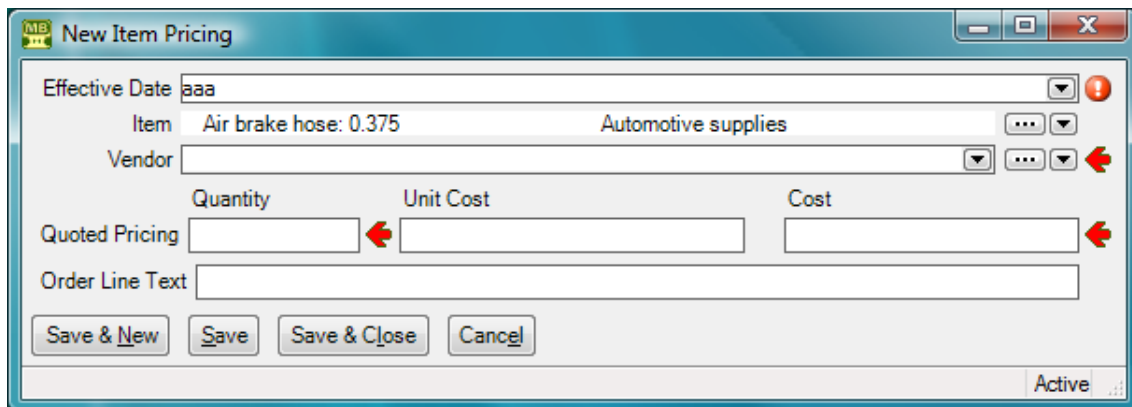
If you try to save a record when it contains an invalid field, MainBoss will display an error message and won't save the record.

To find out why a data value is invalid, move your cursor to the error marker. MainBoss will display a tooltip with a message explaining why the current value can't be accepted. This is shown below:

Concurrency Errors

In the rare case that two people try to edit the same record at the same time, MainBoss will report a *concurrency error*.

For example, suppose you start editing a **Units** table record and before you're done, someone else tries to edit the same record. The first person to save the record will succeed. The second person to save the record will receive an error message indicating that the record has changed while you were making your changes:
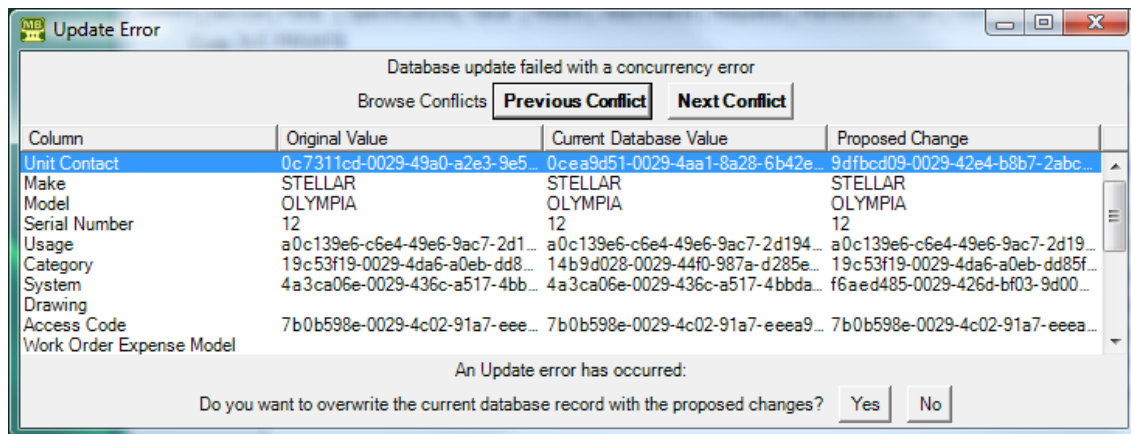
MainBoss is asking you to resolve conflicts between the changes that were just made. The error message lists the fields in the record. For each field, there are three columns:

☐ The first column shows the record's values at the time you began editing

☐ The second column shows what the values are now (the ones that the other person saved)

☐ The third column shows the new values you've specified yourself

Where the values are different, you can see fields where your values differed from the other person's. The **Next Conflict** and **Previous Conflict** buttons jump to fields where the values conflict.

In many records, some field values will look like nonsense strings of characters. These strings are actually links to other tables. For example, the "**Category**" field refers to an entry in the **Unit Categories** list. The field's value is a meaningless string that serves as a pointer. You can see if two pointers have the same value, but you can't tell anything about the record they point to.

When conflicts occur, it's best to click the **No** button on every conflict; this basically says, "Ignore what I just did.") Then just go back and start editing the record again. This time you'll see the values that the other person put in. You can then decide which of these you want to change.

Interrelated Records

MainBoss records are often linked to each other. For example, a record describing a piece of equipment might have a link to a service contract record, indicating that the equipment is covered by the service contract. This link is roughly analogous to a link on a web page: it's a pointer that MainBoss can follow in order to find related information.

If record A links to record B, record B often links back to record A. For example, just as an equipment record can link to a service contract, each service contract record has links to all the units covered by the contract. This makes it possible for MainBoss to go from equipment to service contracts or vice versa.

Now suppose you're creating a new unit record and you go to the **Service Contracts** section. If you haven't yet saved the unit record, you'll see that the **New Service Contract** button in the **Service Contracts** section is disabled. Why? Because the unit record doesn't exist until you save it. If you tried to create a new service contract record before the unit record was saved, there'd be nothing to link the service contract back to.

For this reason, **New Service Contract** stays disabled until you save the unit record. After that, **New Service Contract** is enabled and you can use it to create a new service contract.

Note that if you hold the cursor on a disabled **New** button, a tooltip will explain the situation.

If this seems confusing, just remember this rule: **If you're in the middle of creating a new record, MainBoss may not let you create a connected record until you save the first record.**

If you find that a **New** button is deactivated, saving the current record will usually activate the button.

Corrections

Some editors have a **Correct** button. **Correct** is used to make corrections to information that has already generated accounting transactions (e.g. records of actual costs on work orders). To maintain an accurate audit trail, MainBoss doesn't let you change or delete existing accounting records. Instead, you have to create new *correction* records which add or subtract from previous monetary values.

On a similar principle, *physical count* records resulting from taking inventory can't have their numbers altered once the record is saved. Instead, you have to *void* (cancel) a physical count, then record a new count. Again, the point is to prevent numbers from being fudged—you always leave an audit trail.

Reports

Reports can display and analyze your maintenance information. Many sections in the control panel have subsections that offer reports; for example, **Work Orders** | **Reports** offers you a number of reports dealing with work orders.

When you choose the control panel entry for a report, you get a window that lets you specify options for the report:
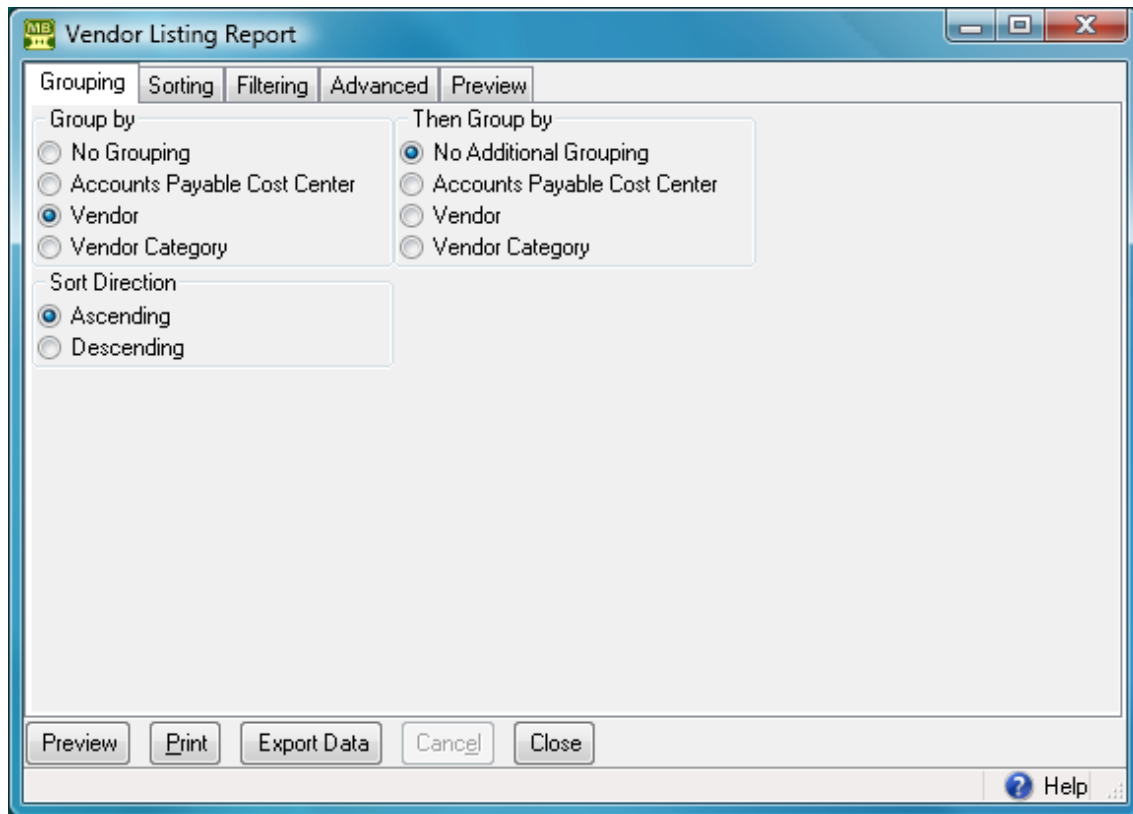
Report Sections

The window associated with a report organizes options into sections. Different reports have different sections, but here are the most common:

Grouping, **Sorting** or **Grouping and Sorting**: Lets you control how the report is organized. For example, suppose you're printing information on work orders. The report will be divided into sections, with each section containing work orders that have something in common. For example, each section might refer to a different location (which gives you a location-by-location breakdown of the work you do). As another example, you might group your information by unit, so that you get a unit-by-unit breakdown of your work orders.

Within each section, you can *sort* by other criteria. With work orders, for example, you can sort by "**Start Date**" (the date each job began), by "**End Date**" (the date each job ended), by work order number, and so on.

If you choose a grouping option, MainBoss offers you more options so that you can create sub-groups within groups. Similarly, if you choose a sorting option, MainBoss offers you more options so that you can refine the sorting process.

Grouping options break a report into sections; each section has headings to indicate the start of the section, and may have footers as well. (If a section has more than five entries, the total number of entries will be shown in parentheses after the group heading.) *Sorting* options sort information within each section; they do not result in headings.

If a particular group has no elements, that group will not appear in the report. For example, suppose you're printing information about inventory items, grouped by item category. If a particular category has no items in it, that category will be omitted from the report.

Filtering: A *filter* lets you select which records you do and don't want in the report. For example, you might want to restrict a report on units to units in a particular category. Filter sections let you specify such restrictions.

The **Filtering** section lists a number of checkboxes; each is associated with a type of information that you can select. When you checkmark one of the boxes, MainBoss opens a window where you can specify the information that you want included in the report:

Range of values: If you select **Range of values**, you can restrict the report to a consecutive set of records.
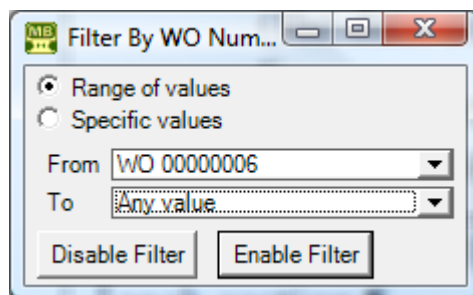

You specify the start of the range in the "**From**" line. You can select any record or else specify `Any value`, in which case the report will begin at the start of the list. For example, if you're filtering by work order number and you set "**From**" to `WO 00000006`, the report will begin with the specified work order and continue on from there. If you specify `Any value`, the report will begin with the very first value in the appropriate table.

Similarly, you specify the end of the range in the "**To**" line. You can select any record or else specify `Any value`, in which case the report will end with the end of the list.

If you select the same value in both "**From**" and "**To**", the report will only cover the single selected value. For example, if you set both "**From**" and "**To**" to `WO 00000006`, the report will only give you information about that work order.

Note: In ranges (and lists in general), MainBoss only sorts information in numeric order if all the information is numeric. If the information can contain both letters and numbers, then MainBoss sorts all of the information in textual order. This means, for example, that the value 011 sorts *before* 10—anything that starts with 0 sorts before anything that starts with 1.

Specific values: If you select **Specific values**, MainBoss gives you a check-list of possible values.
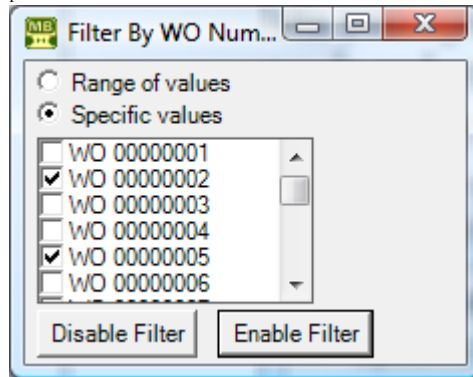
Checkmark the entries you want to include in the report.

Enable Filter: Clicking this *activates* the selection you've just made. MainBoss closes the filtering window and restricts the report as you specified. When you return to the previous window, you'll see that the filter has been checkmarked.

Disable Filter: Clicking this *de-activates* an existing selection. MainBoss closes the filtering window and removes any associated restrictions on the report. When you return to the previous window, you'll see that the filter has been marked as blank.

Advanced: Lets you specify a title for the report when it is printed, the fonts to be used, and (usually) the types of data that the report contains.

In some reports, **Advanced** options let you obtain *summaries*. A summary typically gives totals and sub-totals of monetary amounts for the groups and sub-groups of the report. In some cases, the summary may also give you averages (e.g. the average lifespan of a particular kind of equipment). If you do not specify **Grouping** section options, summaries may not give you much information.

Show checkboxes: In most reports, the **Advanced** section contains a number of checkboxes that let you specify what information the report should contain. For example, in the window for printing work reports, you can use the checkboxes to say which information from a work report should be shown in the report.

When you specify that a particular piece of information should appear in a report, it will generally appear in a labeled column or else it will be labeled within a row. If you are grouping by a particular field, that field will be used as a group heading, so it won't also appear in a labeled column.

The columns in a report are made wider or narrower, depending on how many pieces of information you've asked for. Asking for many different data fields will shrink the width of each column and may make the report difficult to read. Printing a report in landscape format rather than portrait may improve readability. Another option is to export the report to Microsoft Excel; if you do that, you can avoid the problems that arise from trying to cram a lot of information onto a limited piece of paper.

Preview: Displays a preview of the report—a version of what you'd see if you actually printed the report on paper. Preparing such a preview often takes time, since MainBoss may have to process a lot of data; therefore, you might have to wait while MainBoss creates the preview.

Depending on the contents of your database, certain combinations of options in **Grouping**, **Sorting**, **Filtering**, and **Advanced** may result in a report with little or no useful information. You are encouraged to experiment with the options to find combinations that are particularly helpful to your work.

Report Controls

Every window for printing a report contains a number of buttons at the bottom:

Preview: Goes to the **Preview** section of the window and creates a preview of the report. Preparing such a preview may take some time.

Print: Immediately prints the report, using whatever sorting and filtering options you have specified. You can use this button if you don't want to preview it first. You can cancel printing with the **Cancel** button.

Refresh: Updates the window to reflect any recent changes in data. For example, suppose you're looking at a preview of a report about work requests; meanwhile, somebody else at your company creates a new request. The new request isn't automatically added to the report you're looking at—you have to click **Refresh** first.

Export Data: Exports the report's data in XML format. The result is primarily intended to serve as input for user-written programs which process the data in some way. This contrasts with the **Preview** export facilities (discussed below), which are most useful for embedding in Microsoft Word documents and other "unprocessed" contexts.

Clear Select for Printing: If you click this button, MainBoss removes the checkmark from all **Select for Printing** boxes on all requests. Typically, you do this after printing requests that have been marked **Select for Printing**.

Cancel: Cancels the preparation and printing of a report. This button is enabled only when MainBoss is preparing a report, i.e. gathering the data and formatting it. Once the report is ready to print, MainBoss hands off the result to the Microsoft Windows printing facilities; after the report has been handed off to Windows, MainBoss has no more control over the print-out and the **Cancel** button won't work. (If you want to cancel the print-out after that, you must use the standard Windows printer control facilities.)

Depending on the configuration of Windows and the Microsoft Report Viewer, canceling a report may result in a diagnostic message. Typically, you can just ignore this message.
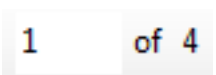
Close: Closes the window. (This button is only present if you opened a separate window to print the report.)

The Preview Window

The **Preview** section of a print window contains a control bar like this:

This bar contains the following (from left to right):

⏮ First Page button: Goes to the start of the document.

◀ Previous Page button: Goes to the previous page of the document.

 Gives the number of the page that is currently being displayed and the total number of pages in the report. You can go to a specific page by typing the appropriate page number into the box.

▶ Next Page button: Goes to the next page of the document.

⏭ Last Page button: Goes to the last page of the document.

◀ Parent Report button: Only applies when a report contains sub-reports, and this feature is not currently used.

🛑 Stop button: Stops processing the report. You might click this you start preparing a lengthy report, then change your mind.

Print button: This is the button that actually prints the report.

Print Layout button: Switches the display between *document map* format and *layout* format.

In document map format, the left side of the display contains an index of the information in the report. Clicking an entry in the index will move to the corresponding information. The mouse wheel can move forward or backward through the report but it doesn't necessarily move backward or forward by a whole number of pages.

In layout format, you see a scaled-down version of the page as it will actually print. The mouse wheel will move from one page to the next.

Page Setup button: Opens a window where you can specify paper size, margin size, and other printing information.

Export button: Exports information from the report into a file suitable for use with some other program. If you click the down-arrow associated with this button, you'll see a list of available export formats.

100%

Scale: Controls the scale of information displayed in the preview window. For example, if you set the scale to 200%, you'll see the information at twice its normal size. If you set the scale to 50%, you'll see it at half its normal size.

Find | Next
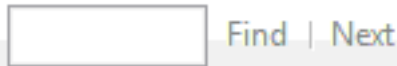
Searching: To search for information in the report, type what you want to find in the box, then click "Find". For example, if you're looking at a full Units report and want information on a particular unit, type the unit name in the box and click "Find". Clicking the associated "Next" button goes to the next occurrence of the same text.