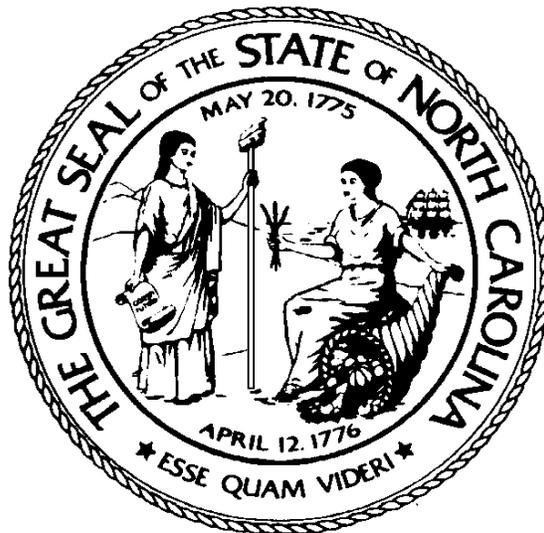


Using IE in the NCAS Environment

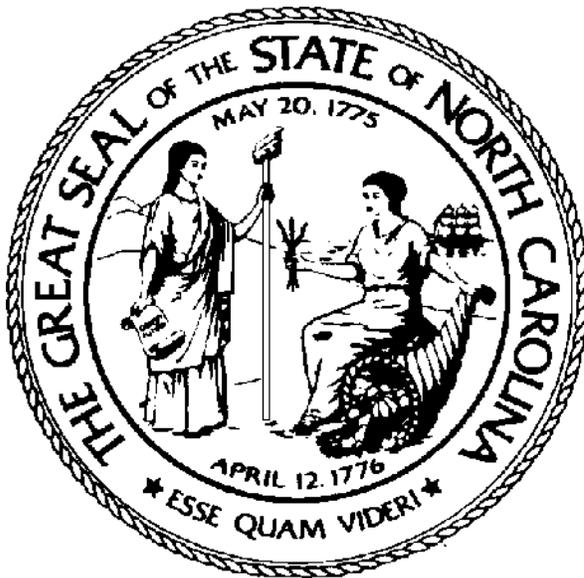
Training Course



State of North Carolina

NC Accounting System

North Carolina Accounting System
Using IE in the NCAS
Environment
Training Course
3rd Edition



Office of the State Controller
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This training was prepared by:
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Course Overview

Overview

The North Carolina Accounting System (NCAS) provides a complete information access environment.

- The NCAS allows direct access to the status of a document or transaction using inquiry screens.
- The Report Management and Distribution System (X/PTR, pronounced "Exporter") distributes images of over 250 groups of NCAS reports.
- Decision Support System (DSS) is a client-server based analytical tool for NCAS users.
- Information Expert (IE) is the primary mainframe reporting tool of the NCAS and the subject of this course.

Most of the standard daily and monthly NCAS reports are produced using IE. The Office of the State Controller (OSC) makes IE reporting easier for non-technical users by providing ready-to-run report formats and plain language run statements. Non-programmers can easily produce reports by inserting company numbers, dates and other familiar data into these run statements. This course provides a practical, non-technical, hands-on approach to using IE.

Audience

Primary NCAS IE users

Length

4 hours

Objectives

Upon successful completion of this course, participants will be able to:

- Understand how the eight NCAS business applications are coordinated during the nightly production process
- Select an IE report to solve an informational need
- Edit run statements to define the data to appear in the report
- Submit a request to the mainframe to produce the report
- View and navigate through the resulting report
- Print IE reports
- Maintain the user library
- Identify problems and resolve them

NOTES

Sections

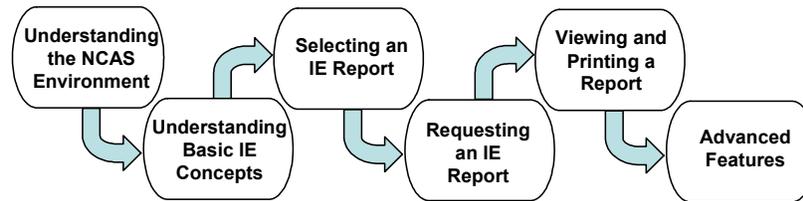
The *Using IE in the NCAS Environment* course is organized into the following sections:

- Business Process Overview
- Understanding the NCAS Environment
- Understanding Basic IE Concepts
- Selecting an IE Report
- Requesting an IE Report
- Viewing and Printing a Report
- Advanced Features

Procedures

Procedures are the detailed process steps that describe how to complete the tasks involved in a participant's job. These can be used after training as a reference on how to use the NCAS to perform job functions.

Business Process Overview



Information Expert (IE) is the primary mainframe reporting tool used to access data in the NCAS. Most of the standard NCAS daily and monthly reports are generated using IE. The OSC provides user versions that produce most of these standard reports in libraries accessible by agencies. These familiar reports can be generated with broadened or narrowed data ranges to meet particular needs. The OSC also provides formats for dozens of additional analytical reports developed to support NCAS users. IE can also reproduce reports from data no longer available with online inquiry or X/PTR. This course is designed to teach non-programmers how to use IE to produce the reports they need. The above graphic, known as a course map, lists each of the course's sections. Each of these sections is described below.

Understanding the NCAS Environment

The NCAS uses eight major business applications to conduct the state's business. These business applications interact with each other to maintain data integrity, accuracy, and internal control. This section of the course defines the relationships among these applications. The nightly NCAS production process that coordinates these systems is also explained. NCAS is a mainframe based accounting and materials management system, and Information Expert is a mainframe reporting tool.

Understanding Basic IE Concepts

IE reports are created by editing and submitting simple run statements that tell the mainframe computer to produce the needed reports. Using these instructions, IE assembles all the other resources necessary to produce a report. This section of the course explains how to use basic navigational tools and commands to explore IE components. This section of the course also explains the operation of IE and provides a description of IE's basic components: the inputs used to generate reports and the resulting report outputs.

NOTES

Selecting a Report

With the variety of reports available in IE, choosing the correct report can be a challenge. This section explains the types of reports available and method of trying to choose the right one.

Requesting a Report

Once the correct report is chosen, parameters must be set in a very precise format. Parameters allow the user to specify the data to be viewed. This section explains how to tell the computer what data to include in the report and how to submit it.

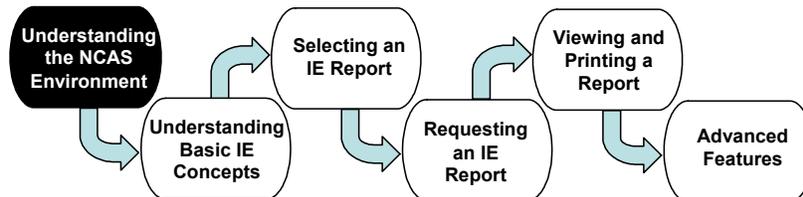
Viewing and Printing Reports

Viewing the finished reports requires using the computer screen to examine finished reports. In some cases, the final report is wider than can be seen on a computer screen. The user can also instruct IE to find a particular string of characters anywhere within a report. Basic report printing will be explained in this section. Additional printing features are covered in the *Advanced Features* section.

Advanced Features

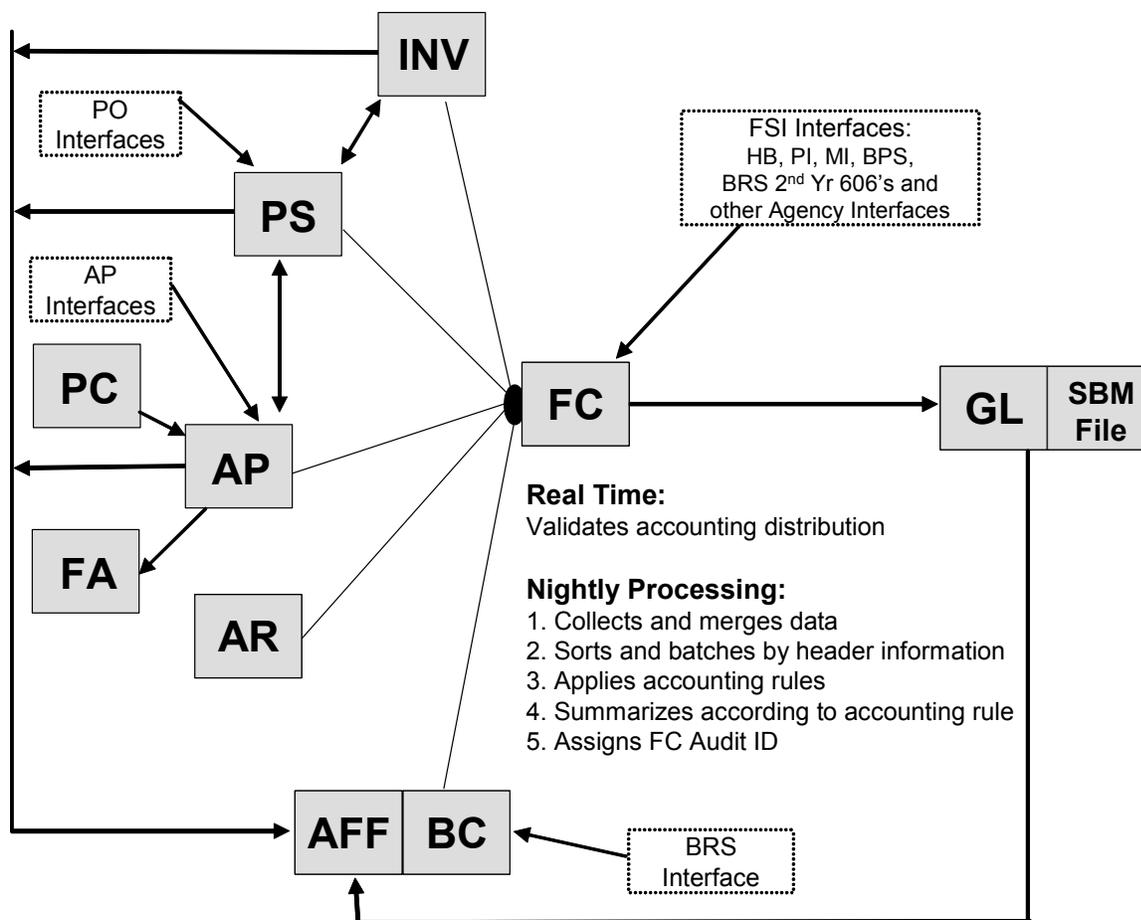
Most problems in IE can be avoided by careful preparation of the run statement. This section explains how to determine if a problem exists and how a user can get help to fix it. Copying and preparing custom reports and editing Job Control Language (JCL) to change printers and printing large reports are also covered.

Understanding the NCAS Environment



Overview

The NCAS is the central financial system for the State of North Carolina. It provides business applications to support common business functions, while accommodating many unique agency business requirements. It provides the necessary integrated business activities. The business applications of the NCAS are shown in the following figure:



NOTES

Understanding the NCAS Environment

The NCAS provides four methods of information access. Each method offers advantages for particular purposes. The best method depends on the amount of data to be examined, the periods involved, the NCAS business applications (for example Accounts Payable or Purchasing), and how frequently the data will be needed. The following is a brief discussion of the advantages of each method.

Inquiry

Many questions can be answered using the online inquiry process. Using computer screens is the direct approach to viewing limited amounts of data. Inquiry is a useful tool for determining the status of a particular transaction or data item. Inquiry is most useful when the user knows a piece of information to use to start inquiring (a purchase order number, etc.)

Report Management and Distribution System (X/PTR)

The report management and distribution system (X/PTR) delivers viewable images of the NCAS reports executed during the nightly production process. X/PTR offers fast access to available reports and includes report navigational commands, including a very helpful FIND command. It also allows selective printing of report pages. X/PTR delivers additional capabilities besides viewing and printing, which can be used to extract information from report pages.

Decision Support System (DSS)

The Decision Support System (DSS) offers timely, direct access from the PC desktop to the NCAS data using flexible queries. NCAS information is downloaded each day from the mainframe and stored in relational databases on agency local area networks. Most data is not available at the same level of detail as on the mainframe due to the analytical purpose of the DSS environment. The DSS provides tools to explore the NCAS information and to develop custom reports. Retained reports are refreshed with new information each day. Financial Management and Materials Management data are presently available.

Information Expert

Information Expert (IE) is the mainframe reporting tool used to produce most of the NCAS reports viewable in X/PTR. But IE is also a powerful analytical tool. IE can produce reports in the familiar production formats but with data ranges broadened or narrowed to suit a particular need. The OSC provides dozens of analytical reports that have been developed to support NCAS users. Reports can be produced for periods that are no longer available by online inquiry or in X/PTR. All NCAS business applications can be accessed using IE. IE provides a simple way for non-technical users to produce reports.

The NCAS Production Process

NOTES

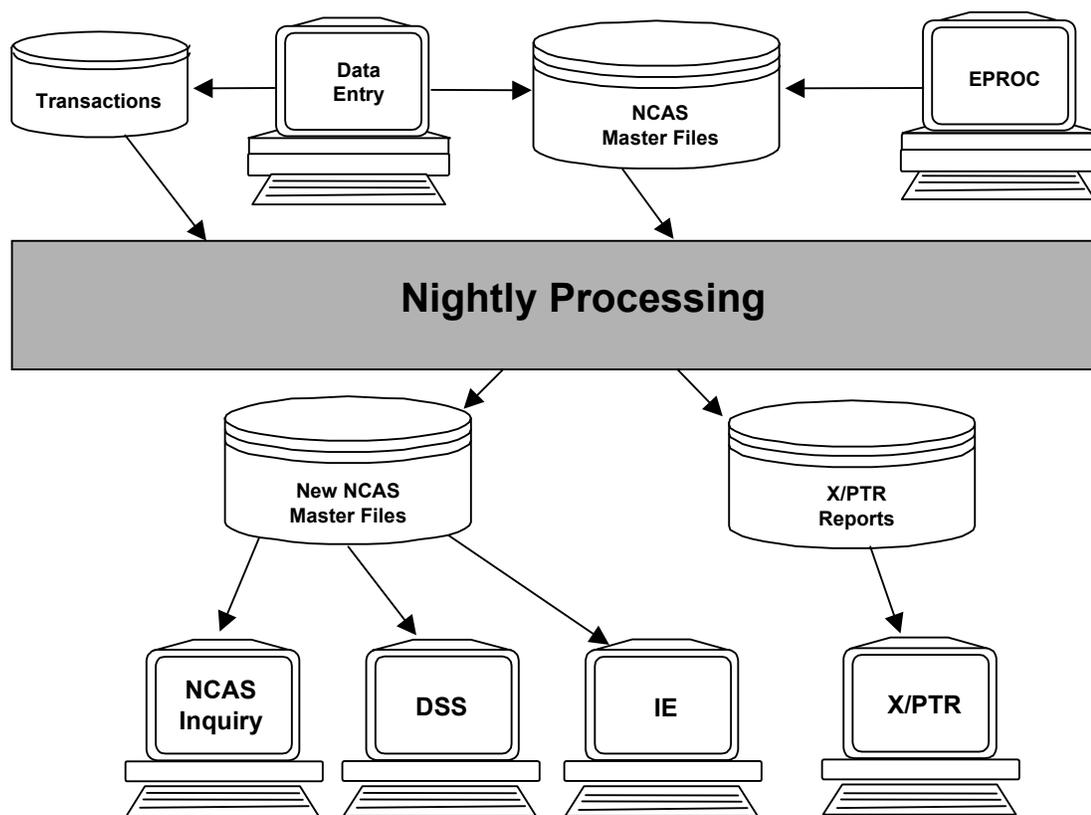
NCAS uses information from many sources to transact the state's business. Certain NCAS data elements are centrally maintained by the OSC to ensure uniformity. For example, account numbers are validated against the general ledger master chart of accounts. Purchase orders refer to vendors found in the statewide trade vendor file and purchased items are found in the statewide item files. These checks make the NCAS data consistent and statewide reporting uniform.

In addition, improved efficiency and internal control result from bringing data forward from related transactions. For example, information entered on purchase requisitions is carried forward to the purchase order, which in turn provides information necessary to record the receipt of goods. Purchase orders, receipts, and vendor invoices taken together provide the basis for payment to the vendor. All this cross-checking is made possible by the work performed in the NCAS production process. The NCAS production process runs overnight each Monday through Friday.

During the production process, the system completes any processes that were requested by an end user during the day. The production process also includes many standard processes that execute nightly, such as interfaces from other systems and check production runs. At the end of the production process, NCAS files reflect the nightly activity and can be used in the generation of IE reports.

NOTES

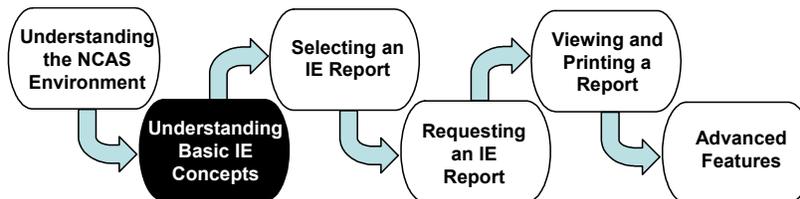
The following diagram illustrates the relationship between daily data entry (input), nightly processing and NCAS reporting (output).



Some information entered into the NCAS during the day is queued to temporary locations and can be viewed through online inquiry screens. During the nightly processing the temporary files are removed and the data added to the regular NCAS master files.

As illustrated previously, NCAS Inquiry and IE refer to the same data. X/PTR and the DSS reflect the transactions and data as processed the previous night. In most cases, exactly the same numeric values can be viewed from all four NCAS Information Access sources.

Understanding Basic IE Concepts



Overview

Certain IE terms and navigational tools are important for a user to understand in order to acquire a basic understanding of IE. These concepts include an understanding of IE basic navigational commands, libraries, and primary options within IE. This chapter explains these basic commands.

IE Screen Basics

IE screens contain common functions. Basic characteristics of IE screens include the following:

- Control fields
- Function keys (PF or F)

Control Fields

Control fields are used to perform special functions while navigating in IE.

```
D B S  INFORMATION EXPERT  -----  PRIMARY OPTION MENU  PM

      ENTER SELECTION BELOW:

      ER - EXPERT REPORTING
      SM - SOURCE MANAGEMENT
      JS - JOB PREPARATION & SUBMISSION
      RV - REPORT VIEWING
      SA - SYSTEM ADMINISTRATION
      MR - EXPERT MANAGEMENT REPORTING
      EN - END THE SESSION

      SELECTION ==>> SM
      LIBRARY ==>> GLPUBLIC

ACTION: _____

PRESS:      ENTER Process          PF1 Help      PF3 End Session
```

- The SELECTION field can be found on menus and submenus. After determining the item to be selected from the list, type the corresponding code in the SELECTION field.

NOTES

- The LIBRARY field displays the library in which you are currently working.

```

EDIT RUN STATEMENTS: C-U-GL-DETAIL-LEDGER-DAPG67  R  -- -- -- COLUMNS 001 072
COMMAND INPUT ==> (SCROLL ==> HALF)
-----1-----2-----3-----4-----5-----6-----7-----
***** TOP OF DATA *****
000100 RUN C-U-GL-DETAIL-LEDGER-DAPG67 ;
000110 FROM LIBRARY GLPUBLIC ;
000120 INTO LIBRARY XXXXXXX ;
000200 VARIABLE FROM-EFFECTIVE-DATE ;
000300 '00/00/00' ;
000400 VARIABLE THRU-EFFECTIVE-DATE ;
000500 '00/00/00' PANY-ID ;
000600 VARIABLE CURRENT-YEAR-IND ;
000700 'Y' ;
000800 VARIABLE PRIOR-YEAR-CLOSED-OR-NOT ;
000900 'N' ;
001000 SELECT C-GL-COMPANY-ID ;
001100 'XXXX' ;
001200 *SELECT C-GL-ACCOUNT-ID ;
001300 * ('XXXXXXX' 'XXXXXXX') ;
001400 SELECT C-GL-CENTER-ID ;
001200 ( 'SXXXX' 'XXXXXXXXXXXXX' ) ;
ACTION: _____ 1 Help 3 End 5 Find 6 Change 7 Pg Bwd 8 Pg Fwd )
    
```

 Numbers at the bottom of the screen correspond to the PF keys.

- The COMMAND INPUT ==> field provides a place to enter edit commands. The following commands are useful when editing and submitting a run statement. Short equivalents are shown in parentheses.
 - **Cancel (CAN)** ends the edit session. Use this command after the run statement has been submitted (or to abort the effort).
 - **Change (C)** replaces the first text specified after the command with second text specified. An example of the command is C 'XX/XX/XXXX' '07/31/2004'. This will replace the first occurrence of 'XX/XX/XXXX' with '07/31/2004'. Pressing **F6** will repeat the change command on the next occurrence of 'XX/XX/XXXX'.
 - **Check** reviews the syntax of the run statement. It will be fully explained later in the *Requesting an IE Report* section.
 - **Find (F)** locates the first occurrence of a specified string. An example of the command is F 'COMPANY'. The quotes can be eliminated if the string contains no blanks. Pressing **F5** repeats the find for the next occurrence.
 - **Max (M)** is used with the **F7** to move to the top of the member or with **F8** key to scroll to the last line of the member.
 - **Save (S)** is used to save changes to the member. The changes will be made permanent.
 - **Submit (SUB)** passes the run statement to IE, which will then produce reports.

NOTES

- SCROLL = = = > HALF indicates the amount of text that will be moved up or down when the scroll is requested by pressing the **F7** to scroll backward or **F8** to scroll forward. The amount of the screen that is moved forward and backward is shown in this area. Normally the scroll is set to HALF to move the screen 9 lines each time. You may change it to PAGE to cause the screen to be moved 18 lines.

```

D B S  INFORMATION EXPERT ----- SOURCE MANAGEMENT DIRECTORY LISTING  SMLS
LIBRARY: GLPUBLIC ----- NUMBER OF MEMBERS: 0128  MAXIMUM: 0225
FIND: -----
MEMBER NAME                TYPE                NOTES:
-----
AAA-LIBRARY-NEWS           MISC TEXT           Enter an S next to the
AOA-HOUSING-FINANCE-FSI    RPT SERIES          member to be edited.
C-ALPHA-NUMERIC-2          SUBROUTINE
C-CONVERT-CENTER-MASK      SUBROUTINE           To change libraries,
C-CONVERT-DATE-2           SUBROUTINE           enter the name of the
C-CONVERT-DATE-3           SUBROUTINE           new library & press
C-GL-BD701-AUTH-REPORT-UNI-RUN  RUN STATEMTS        the ENTER key.
C-GL-BD701-AUTH-REPORT-UNIV  RPT SERIES
C-GL-BD702-REPORT-CV1-UNIV  RPT SERIES
C-GL-BD702-REPORT-CV1-UNIV-RUN  RUN STATEMTS
C-GL-BD725-CI-REPORT-UNIV  RPT SERIES
C-GL-BD725-CI-REPORT-UNIV-RUN  RUN STATEMTS
C-GL-BUDG-CODE-TRIAL-BL-UN-RUN  RUN STATEMTS
C-GL-BUDG-CODE-TRIAL-BL-UNIV  RPT SERIES
C-GL-CNTR-TRIAL-BALANCE-UN-RUN  RUN STATEMTS
ACTION: -----
PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd

```

- The FIND field is used to find a specific name in a member list. If you type the name (or first several characters of the name) in the FIND field and press **Enter**, the screen will scroll to the report name or the closest match. The FIND field eliminates the need to scroll through screens to locate a member.
- The ACTION field appears on all screens in the lower left corner. The ACTION field is used to Fastpath through IE, to simulate function keys, and to log off.

 **Fastpath** is a short-cut way to directly access a screen without going through menus and submenus.

 Some fields appear only on certain screens: **SELECTION**, **LIBRARY**, **COMMAND INPUT**, **FIND**, and **ACTION**.

NOTES *Function Keys*

In addition to alphabetic and numeric keys, control keys and function keys can be used. On the keyboard, function keys are commonly along the top and are labeled either PF or F.

Function Key	Function	Command
F1	Online Help.	HELP (?)
F3	Return to previous screen. Exits a split screen.	END
F4	Move to the Top of the next report. (Applies to Report Viewing)	NEXTRPT NR
F5	Find the occurrence of a character string.	None
F6	Move to the beginning of the current report. Repeats change.	TOP
F7	Page backward. (Scroll up)	PB
F8	Page forward. (Scroll down)	PF
F9	Move to the first line of the last page of the current report.	BOTTOM
F10	Scrolls screen to the left.	None
F11	Scrolls screen to the right.	None
F12	Return to the Primary Option menu.	None
None	Find the first occurrence of a string.	FIND F

 If your keyboard does not have function keys, you can use the ACTION field to simulate them. For example, if you do not have an F12 key, you can enter 12 in the ACTION field instead. NOT all PF keys are valid on all screens. The PF keys that are valid for the current screen are displayed across the bottom.

Additional basic keys are used to navigate in IE:

Tab	Moves cursor to the next field.
Enter	Records the information you have typed.
Home	Moves the cursor to the first field on the screen.
Shift+Tab	Moves the cursor to the previous field.

Some keyboards have two additional keys that also help in navigation:

Pause	Erases the current screen. Allows you to return to the CICS screen.
End	Removes any extra or invisible characters from a field.

Libraries

NOTES

All IE information is stored in libraries. Libraries contain members. Each library contains components in the following areas:

- Report Viewing Component
 - Reports or listing produced when a report series is run
- Report Request Component
 - Machine code generated when a report series is successfully prepared
- Source Component
 - Expert language commands that define a report series, Run statements, Job control language or other miscellaneous types of members

All IE tasks are accomplished by processing library members. Reports are produced by examining, editing, and submitting library members. Completed reports are made available to the user as library members. A library can be public or private. A private library is one where no one but **one** designated user can access. A public library is one where **more than one user** has access.

Agency Libraries

Agency libraries are used to store report series and run statements belonging to an agency. Agency libraries are defined as public libraries. Security is established allowing only personnel in a designated agency access to the library. A default agency library is assigned to each IE user. For example, users who run purchasing reports most frequently might be assigned the MTMGTX library, where XX represents the user's agency number. Users may have access to any or all of their agency public libraries. The usual agency libraries are shown in the following list:

ADMINXX	Administrative development
DPXX	Data processing development
FINANXX	Financial Controller (FC), Budgetary Control (BC), and General Ledger (GL) reports
MISCXX	Miscellaneous - Fixed Assets (FA), Accounts Receivable (AR) reports
MTMGTX	Materials Management - Accounts Payable (AP), Purchasing (PS), and Common Components (CC) reports
PRODXX	Agency production reports and run statements
USERXX	User development

 These assignments are just guidelines. Agencies can use their public libraries to their own discretion.

NOTES

Product Libraries

Like agency libraries, product libraries are public libraries. All IE users have access to these public libraries. All product libraries are read only, which means that users cannot save changes. Public product libraries contain the most up-to-date versions of reports.

 NCPUB is a special public library that allows users to save reports and run statements. NCPUB library members are deleted periodically. You can use NCPUB to share a report with another agency or for assistance from the OSC in debugging.

The following is a list of public product libraries:

APPUBLIC	Accounts Payable (AP) reports
ARPUBLIC	Accounts Receivable (AR) reports
BCPUBLIC	Budgetary Control (BC) reports
CCPUBLIC	Common Components (CC) reports
FAPUBLIC	Fixed Assets (FA) reports
FCPUBLIC	Financial Controller (FC) reports
GLPUBLIC	General Ledger (GL) reports
INPUBLIC	Inventory (IN) reports
NCPUB	North Carolina Public (NCPUB) reports (see previous note)
PSPUBLIC	Purchasing (PS) reports

Online Support Facility

The Online Support Facility (OSF) is an interactive product that assists users in creating, maintaining and running reports using the Expert Language. It is also used to maintain libraries.

The *Primary Option Menu (PM)* is the main menu of the OSF. The menu is organized into groups based on functionality. Each section has its own set of menus and screens to allow processing of particular types of library members. The primary options covered in this course are *Source Management (SM)* and *Report Viewing (RV)*. The following illustration shows the *Primary Option Menu*.

NOTES

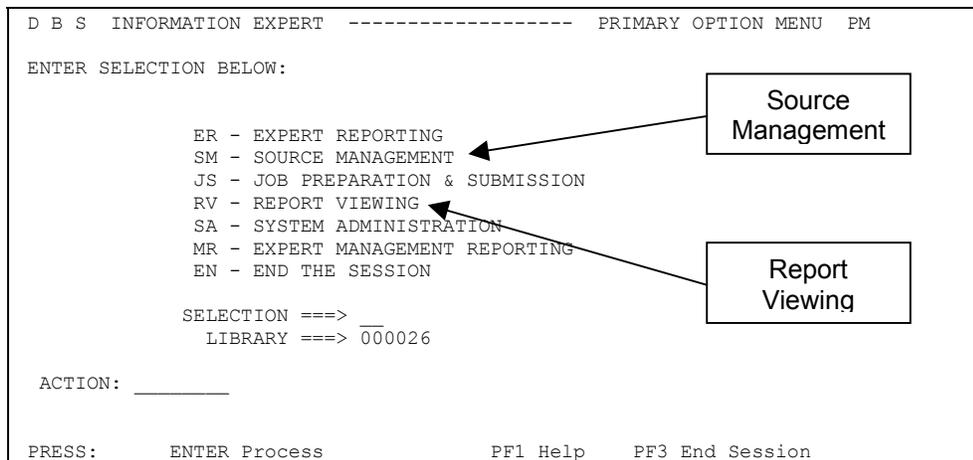
```
D B S  INFORMATION EXPERT  -----  PRIMARY OPTION MENU  PM
ENTER SELECTION BELOW:

      ER - EXPERT REPORTING
      SM - SOURCE MANAGEMENT
      JS - JOB PREPARATION & SUBMISSION
      RV - REPORT VIEWING
      SA - SYSTEM ADMINISTRATION
      MR - EXPERT MANAGEMENT REPORTING
      EN - END THE SESSION

SELECTION ==>  _
LIBRARY ==> 000026

ACTION: _____

PRESS:      ENTER Process      PF1 Help      PF3 End Session
```



Source Management

Source Management Facility (SM) provides a way to enter, store, and process Expert Language commands through a full screen editor. Source members are viewed, edited, and processed using the Source Management menus and screens.

Report Viewing

Report Viewing (RV) provides a way to view preparation listings and reports online. Reports no longer needed for viewing can be deleted using the Report Viewing Utility.

Logging on to OSF

Accessing the Online Support Facility requires logging on to the main-frame computer using terminal emulation such as IRMA or !Extra. When this program is executed, access to the Information Technology Services (ITS) menu should result. The following screen should appear. If this screen does not appear, contact your agency technical support staff for assistance.

```
149.168.91.243  VIA TCP/IP TO THE NORTH CAROLINA STATE NETWORK  --
-- HELP: (919) 872-8841 / 1-800-722-3946  --

*  UNAUTHORIZED OR PERSONAL USE OF COMPUTER INFORMATION AND/OR EQUIPMENT  *
*  IS A VIOLATION OF STATE AND FEDERAL LAWS.  *

APPLICATION:
```

NOTES

WALKTHROUGH: Logging On to IE

SCENARIO

A request has been made to run an Information Expert report from one of the product libraries. First you must log on to IE. The following walk-through will allow you to become familiar with the LOGON process and access the CICS training region SCCO.

```
149.168.91.243 VIA TCP/IP TO THE NORTH CAROLINA STATE NETWORK --
-- HELP: (919) 872-8841 / 1-800-722-3946 --

* UNAUTHORIZED OR PERSONAL USE OF COMPUTER INFORMATION AND/OR EQUIPMENT *
* IS A VIOLATION OF STATE AND FEDERAL LAWS. *

APPLICATION: 1
```

1. Type **CICSSCCO** at the APPLICATION line on the State Sign-On Banner and press **Enter**. This will access the training region data.

 When you return to your office, your agency data will be accessed by typing **CICSSCCP** or **CICSNC23**, whichever region has been specified for your agency.

```
WELCOME TO ZSAP CICS 4.1.0. PRODUCTION REGION FOR O.S.C. (NCAS)

cccccccccccc\      IIIIIIIIIIIII\      cccccccccccc\      ssssssssssss\
cccccccccccc\      IIIIIIIIIIIII\      cccccccccccc\      ssssssssssss\
ccc\//////////      \\\III\\////////      cccc\\////////      ssss\\////////
ccc\              III\              cccc\              ssss\
ccc\              iii\              cccc\              ssss\ 4.1.0.
ccc c\            iii\            cccc\            ssss\
ccc\             iii\             cccc\             ssss\
cccccccccccc\    IIIIIIIIIIIII\    cccccccccccc\    ssssssssssss\
cccccccccccc\    IIIIIIIIIIIII\    cccccccccccc\    ssssssssssss\
\\//////////      \\\III\\////////      \\\III\\////////      \\\III\\////////
                                                                    PF 1 Help
                                                                    PF 3 Exit
..fill in bill-code (as:bbb-ddd).

Userid  ==> 2          bill-cde ==> 3
Password ==> 4          New Pswd ==>
Please fill in your Userid and Password and press ENTER
News ----- PF 2 Zoom
| ** A SPECIAL SIG RELEASE HAS BEEN ISSUED WHICH CONTAINS MEMO# NCAS-98-0004* |
| ** THIS MEMO REFERNCES CHANGES IN NCAS TO SALES TAX REPORTING. TO VIEW * |
| ** THE MEMO, GO TO WHAT'S NEW IN THE SIG. PF2 FOR MORE INFORMATION. * |
| ***** |
+-----+
Wed Oct 13 10/13/97 10:22:30 term=$487/ZDA05516 sys=CICSSCCP cpu=SYSE USER
```

2. Type the **USER ID** assigned to your workstation in the USER ID field and press the **Tab** key. The USER ID can be found on your workstation.

NOTES

3. Type **FAA-OSC** in the BILL-CDE field. (This bill code is only used during your training class.)
4. Type the **password** in the PASSWORD field and press **Enter**. (The instructor will give you the password for the class.) Wait until a blank screen displays.



5. Type **IEOL** at the cursor location and press **Enter**.

```
DBS SIGNON                MSA.SIGNON
====>                    10/13/97   10:24:25

-----
DDDDDD  BBBB  SSSS  OOOO  FFFF  TTTT  WW  WW  AAAA  RRRR  EEEE
DD DD  BB BB  SS   OO  OO  FF   TT  WW  WW  AA  AA  RR  RR  EE
DD DD & BBBB  SSS  OO  OO  FFFF  TT  WW  W  WW  AAAAAA  RRRR  EEEE
DD DD  BB BB  SS  OO  OO  FF   TT  WWW  WWW  AA  AA  RR  RR  EE
DDDDDD  BBBB  SSSS  OOOO  FF   TT   WW  WW  AA  AA  RR  RR  EEEE

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User ID  6          Password  6          Group ID

New Password          New Password Verify

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```

6. Type the **IE USER-ID** and **PASSWORD** in the fields on this screen and press **Enter**. (Your instructor will give you the user id and password for this class.) The IE main menu is displayed.

 If you have trouble logging on to IE, contact your agency's NCAS Security Administrator when you return to your agency.

NOTES

```
INFORMATION EXPERT MENU          MSA.MENU
===> 7                          07/11/98   13:33:54
-----
Select  Menu
        1   Information Access Facility
        2   User Profile Maintenance
        3   System Administration
```

7. Type **1** at the cursor position and press **Enter** to select the *Information Access Facility* screen.

```
INFORMATION ACCESS FACILITY MENU  IE.MENU
===> 8                          07/11/98   13:34:34
-----
Select  Menu
        1   Expert Reporting Support Facility
        2   Expert Ad Hoc Reporting
        3   Expert Query
        4   ExpertLink
        5   Utilities
```

8. Type **1** and press **Enter** to select the *Expert Reporting Support Facility* screen.

NOTES

```
D B S  INFORMATION EXPERT  -----  PRIMARY OPTION MENU  PM

      ENTER SELECTION BELOW:

      ER - EXPERT REPORTING
      SM - SOURCE MANAGEMENT
      JS - JOB PREPARATION & SUBMISSION
      RV - REPORT VIEWING
      SA - SYSTEM ADMINISTRATION
      MR - EXPERT MANAGEMENT REPORTING
      EN - END THE SESSION

      SELECTION ==>  ___
      LIBRARY ==>  FINANXX

ACTION:  _____

PRESS:   ENTER Process           PF1 Help       PF3 End Session
```

This is the *Primary Option Menu* screen for the Online Support Facility.

 **Fastpath:** Access the *Primary Option Menu* screen by typing **OSF.PM** in the ==> field on the *MSA.menu* screen.

Source Management

The *Source Management Menu* can be accessed from the *Primary Option Menu*, or by typing SM in the ACTION field.

```
D B S  INFORMATION EXPERT  -----  SOURCE MANAGEMENT FACILITY  SM

      ENTER SELECTION BELOW:

      LS - DISPLAY MEMBER LIST
      CR - CREATE A NEW MEMBER
      CH - CHANGE A MEMBER
      UT - COPY/DELETE/RENAME/MERGE MEMBERS
      RE - RETURN TO PRIMARY OPTION MENU

      SELECTION   ==>  ___
      MEMBER NAME ==>  _____
      LIBRARY NAME ==>  GLPUBLIC

ACTION:  _____

PRESS:   ENTER Process   PF1 Help   PF3 Return to Primary Option Menu
```

From the *Source Management Facility Menu*, you can choose a number of source management functions. You can list members (LS), create members (CR), change members (CH), or perform utilities on members (UT), such as copying one member to another, deleting, or renaming members.

NOTES

 The ACTION field is used to Fastpath through IE. Enter the two or four character name of the screen in the ACTION field to go directly to the screen, bypassing menus. For example, *SMLS* in the ACTION field moves directly to the *Source Management Member List* screen.

Source Management Utilities (SMUT)

Source Management Utilities is used to maintain your IE source library. Functions to copy, delete, and rename members are available.

WALKTHROUGH: SMUT Exercises

SCENARIO

This activity will familiarize you with the features of the Source Management Utility. You will learn to copy and delete members in your library.

```
D B S  INFORMATION EXPERT  -----  SOURCE MANAGEMENT FACILITY  SM

ENTER SELECTION BELOW:

LS - DISPLAY MEMBER LIST
CR - CREATE A NEW MEMBER
CH - CHANGE A MEMBER
UT - COPY/DELETE/RENAME/MERGE MEMBERS
RE - RETURN TO PRIMARY OPTION MENU

SELECTION   ===>  1
MEMBER NAME ===> _____
LIBRARY NAME ===> USERXX

ACTION: _____

PRESS:  ENTER Process  PF1 Help  PF3 Return to Primary Option Menu
```

1. Type **SM** in the SELECTION field and press  to access the *Source Management Facility Menu* screen.

NOTES

```
D B S  INFORMATION EXPERT  -----  SOURCE MANAGEMENT FACILITY  SM

      ENTER SELECTION BELOW:

      LS - DISPLAY MEMBER LIST
      CR - CREATE A NEW MEMBER
      CH - CHANGE A MEMBER
      UT - COPY/DELETE/RENAME/MERGE MEMBERS
      RE - RETURN TO PRIMARY OPTION MENU

      SELECTION   ===> 2
      MEMBER NAME ===> _____
      LIBRARY NAME ===> USERXX

ACTION: _____

PRESS:   ENTER Process   PF1 Help   PF3 Return to Primary Option Menu
```

2. Type **UT** in the SELECTION field and press **Enter**.



Fastpath: Access the *Source Management Utilities* screen by typing **SMUT** in the ACTION field.

```
D B S  INFORMATION EXPERT  -----  SOURCE MANAGEMENT UTILITIES  SMUT

SELECTION OPTION ===  _

C - COPY MEMBER          BLANK - DISPLAY MEMBER LIST
D - DELETE MEMBER        PF3  - RETURN TO PREVIOUS MENU
R - RENAME MEMBER        PF1  - HELP
M - MERGE MEMBERS

INFORMATION EXPERT LIBRARY:

MEMBER   NAME ===> _____
NEW MEMBER NAME ===> _____
LIBRARY  NAME ===> USERXX

IF COPYING TO ANOTHER LIBRARY:   NOTE: Library entered here will be used
NEW LIBRARY NAME ===> _____   as the default target library in
                                   copying members if the DISPLAY MEMBER
                                   LIST option is selected above.

ACTION: _____
```

3. Press **Enter**. A list of all members in the source library will be displayed.

NOTES

```
D B S  INFORMATION EXPERT ----- SOURCE MANAGEMENT UTILITIES  JSMLDU

LIBRARY: USER23                      NUMBER OF MEMBERS: 0013  MAXIMUM: 0225
FIND: _____  DEFAULT "COPY TO" LIBRARY: USERXX
MEMBER NAME                      RENAME/COPY TO                      COPY TO
-----
DATAFRAME-LIST
4 DELETE-THIS-MEMBER
  PREPARATION-JCL
  PRINT-JCL
  RUN-JCL
  ****  END OF DIRECTORY  ****

ACTION: _____  PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd
```

4. Type **D** in front of the member DELETE-THIS-MEMBER and press **Enter**. Confirmation of the delete should display.

```
D B S  INFORMATION EXPERT ----- SOURCE MANAGEMENT UTILITIES  JSMLDU

LIBRARY: 5 RXX                      NUMBER OF MEMBERS: 0013  MAXIMUM: 0225
FIND: _____  DEFAULT "COPY TO" LIBRARY: USERXX
MEMBER NAME                      RENAME/COPY TO                      COPY TO
-----
DATAFRAME-LIST
DELETE-THIS-MEMBER                ** DELETED **
  PREPARATION-JCL
  PRINT-JCL
  RUN-JCL
  ****  END OF DIRECTORY  ****

ACTION: _____  PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd
```

5. Type **GLPUBLIC** over your default library USERXX in the LIBRARY field and press **Enter**.

NOTES

```

D B S  INFORMATION EXPERT ----- SOURCE MANAGEMENT UTILITIES  JSMLDU
LIBRARY: GLPUBLIC                      NUMBER OF MEMBERS: 0142  MAXIMUM: 0225
  FIND:  6 _____  DEFAULT "COPY TO" LIBRARY: GLPUBLIC
                RENAME/COPY TO          COPY TO
MEMBER NAME    MEMBER NAME              LIBRARY
-----
AAA-LIBRARY-NEWS
C-ALPHA-NUMERIC-2
C-CONVERT-CENTER-MASK
C-CONVERT-DATE-2
C-CONVERT-DATE-3
C-U-GL-BD70-REPORT
C-U-GL-BD70-REPORT-DET
C-U-GL-BD70-REPORT-DET-RUN
C-U-GL-BD70-REPORT-RUN
C-U-GL-BD701-AUTH-PROJ-RPT
C-U-GL-BD701-AUTH-PROJ-RPT-RUN
C-U-GL-BD701-AUTH-REPORT
C-U-GL-BD701-AUTH-REPORT-RUN
C-U-GL-BD701-AUTH-RPT-PYR
C-U-GL-BD701-AUTH-RPT-PYR-RUN
ACTION: _____  PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd
    
```

6. Type **C-U-GL-DETAIL-LE** in the FIND field and press **Enter**.

```

D B S  INFORMATION EXPERT ----- SOURCE MANAGEMENT UTILITIES  JSMLDU
LIBRARY: GLPUBLIC                      NUMBER OF MEMBERS: 0142  MAXIMUM: 0225
  FIND:  _____  DEFAULT "COPY TO" LIBRARY: GLPUBLIC
                RENAME/COPY TO          COPY TO
MEMBER NAME    MEMBER NAME              LIBRARY
-----
C-U-GL-DETAIL-LEDGER-DAPG67
7 C-U-GL-DETAIL-LEDGER-DAPG67-R
C-U-GL-DISB-DET-CSH-REC-DL-RUN
C-U-GL-DISB-DET-CSH-REC-DLY
C-U-GL-DISB-DETAIL-CSH-REC
C-U-GL-DISB-DETAIL-CSH-REC-RUN
C-U-GL-DTL-LEDGER-DAPG67-E-RUN
C-U-GL-DTL-LEDGER-DAPG67-EOY
C-U-GL-FEDERAL-COST
C-U-GL-FEDERAL-COST-RUN
C-U-GL-FINES-AND-PENALTIES
C-U-GL-FINES-AND-PENALTIES-RUN
C-U-GL-GASB-CNTR-TRIAL-BAL
C-U-GL-GASB-CNTR-TRIAL-BAL-RUN
C-U-GL-GASB-FUND-TRIAL-BAL
                8
ACTION: _____  PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd
    
```

7. Type **C** before the member C-U-GL-DETAIL-LEDGER-DAPG67-R.

8. Tab over to the column labeled COPY TO LIBRARY. Type your default library **USERXX** in the field and press **Enter**. A confirmation that the member was copied should display.

NOTES

```
D B S  INFORMATION EXPERT ----- SOURCE MANAGEMENT UTILITIES  JSMLDU

LIBRARY: 9 UBLIC                      NUMBER OF MEMBERS: 0142  MAXIMUM: 0225
FIND: _____  DEFAULT "COPY TO" LIBRARY: GLPUBLIC
RENAME/COPY TO          COPY TO
MEMBER NAME             MEMBER NAME             LIBRARY
-----
C-U-GL-DETAIL-LEDGER-DAPG67      ** COPIED **
C-U-GL-DETAIL-LEDGER-DAPG67-R
C-U-GL-DISB-DET-CSH-REC-DL-RUN
C-U-GL-DISB-DET-CSH-REC-DLY
C-U-GL-DISB-DETAIL-CSH-REC
C-U-GL-DISB-DETAIL-CSH-REC-RUN
C-U-GL-DTL-LEDGER-DAPG67-E-RUN
C-U-GL-DTL-LEDGER-DAPG67-EOY
C-U-GL-FEDERAL-COST
C-U-GL-FEDERAL-COST-RUN
C-U-GL-FINES-AND-PENALTIES
C-U-GL-FINES-AND-PENALTIES-RUN
C-U-GL-GASB-CNTR-TRIAL-BAL
C-U-GL-GASB-CNTR-TRIAL-BAL-RUN
C-U-GL-GASB-FUND-TRIAL-BAL

ACTION: _____  PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd
```

9. Type your default library **USERXX** over GLPUBLIC in the LIBRARY field and press **Enter**.

Five members should display in your source library.

```
D B S  INFORMATION EXPERT ----- SOURCE MANAGEMENT UTILITIES  JSMLDU

LIBRARY: USERXX                      NUMBER OF MEMBERS: 0014  MAXIMUM: 0225
FIND: _____  DEFAULT "COPY TO" LIBRARY: USERXX
RENAME/COPY TO          COPY TO
MEMBER NAME             MEMBER NAME             LIBRARY
-----
C-U-GL-DETAIL-LEDGER-DAPG67
DATAFRAME-LIST
PREPARATION-JCL
PRINT-JCL
RUN-JCL
****  END OF DIRECTORY  ****

ACTION: 10 _____  PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd
```

10. Type **SMLS** in the ACTION field and press **Enter**.

Source Management Directory Listing (SMLS)

NOTES

The *Source Management Directory Listing (SMLS)* screen is available from the *SM Menu* screen. The *SMLS* screen provides a list of source members available for processing. A member can be selected from this screen. Once a member is selected, editing can be performed. Several types of source members are available as illustrated in the following example:

```
D B S  INFORMATION EXPERT  ----- SOURCE MANAGEMENT DIRECTORY LISTING  SMLS
LIBRARY: USERXX                NUMBER OF MEMBERS: 0005  MAXIMUM: 0225
FIND: _____

MEMBER NAME                    TYPE          LAST UPDATE INFO    NBR RECDS
-----
C-U-GL-DETAIL-LEDGER-DAPG67    RPT SERIES   10-08-2003 0000XX    6
DATAFRAME-LIST                MISC TEXT    10-18-2000 MSAUSER    1
PREPARATION-JCL               MISC TEXT    04-29-2003 0000XX    1
PRINT-JCL                     MISC TEXT    04-29-2003 0000XX    1
RUN-JCL                       MISC TEXT    10-30-2000 MSAUSER    1
****  END OF DIRECTORY  ****

NOTES: Enter S to select member.  Change library by entering new library name
ACTION: _____  PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd
```

Source Member Types

Source members contain information used by IE to perform reporting tasks. There are four types of source members:

- **Run Statements**

RUN STATEMENTS

Members that are run statements contain instructions for IE to produce a report and provide a method for specifying selection or exclusion criteria at run time for a report. Run members can also accept variable input at run time.

 An IE report is executed by submitting a run statement to the mainframe.

- **Report Series**

RPT SERIES

The report series members contain the actual Expert Language commands that are used to create a report. A report series can contain multiple reports called report requests.

 The Expert Language is taught in *IE03 - Basic Information Expert Reporting*.

- **Subroutines**

SUBROUTINE

Subroutine members contain Expert Language routines that contain common code that can be used by any report series. Subroutines can accept data from a report and pass back results.

NOTES

- **Miscellaneous Text**

MISC TEXT

Miscellaneous text members are used to contain Job Control Language (JCL) or other information needed by IE for processing. JCL is used by IE to submit source members for execution. There are three special members that you should be familiar with:

- RUN-JCL

When the SUBMIT command is issued from a run statement member, the RUN-JCL is used to communicate the request to the computer. The Expert Language is executed to create the report(s) defined in the report series. The RUN-JCL member must contain all data files needed by the report series.

- PRINT-JCL

After a report series has been viewed using Report Viewing, the user may decide to print the report. PRINT-JCL used in printing from Report Viewing.

- AAA-LIBRARY-NEWS

AAA-LIBRARY-NEWS is the first member in every **product** public library. It contains only comments. Every time a report series is modified, this member is updated. Review this member periodically.

Source Member Editing

If a member is selected on the *SMLS* screen, it appears in a full screen editor. There are two types of edit commands – line commands and edit commands. Edit commands are entered from the COMMAND INPUT field. The following commands are available:

- FIND or F

Locate an occurrence of a character or group of characters.

- CHANGE or C

Change an occurrence of a character or group of characters to a different character or group of characters.

- MAX or M

Go to the top of the source member when used with **F7**. Go to the bottom of the source member when used with **F8**.

- RENUM or REN

Re-number the source member.

- RESET or RES

Reset the source member. Removes any intensified messages.

NOTES

- **SAVE or S**
Save the source member. Any updates will be made permanent.
- **CANCEL or CAN**
Cancel any updates made to the source member since the last SAVE command. The source member will not be updated with the changes.
 If changes have been made to a source member, SAVE or CANCEL are the only two commands that will allow you to exit the source member.
- **CHECK**
Examine source member for syntax errors in the Expert Language commands. If errors are found, an appropriate message is displayed after the command in error.
- **SUBMIT or SUB**
Submit the source member to the mainframe for processing.

Line commands are entered over the line numbers on the left side of the screen. The following line commands are available:

- **C COPY Command**
Copy one line. If a specific number is added after the copy command, the specific number of lines will be copied. For example, C3 will copy three lines from where the command was placed.
- **M MOVE Command**
Move one line. If a specific number is added after the move command, the specific number of lines will be moved. For example, M3 will move three lines from where the command was placed.
- **A ADD AFTER Command**
Copy or move a line AFTER the line that contains the ADD AFTER command (A). Used in conjunction with the COPY command (C) and the MOVE command (M).
- **D DELETE Command**
Delete one line. If a specific number is added after the delete command, the specific number of lines will be deleted. For example D3 will delete three lines from where the command was placed.
- **R REPEAT Command**
Repeat one line. If a specific number is added after the REPEAT command, the line will be repeated the specific number of times. For example, R3 will repeat a single line 3 times.

NOTES

- I INSERT Command
Insert a blank line after the line containing the INSERT command. Blank lines will continue to be displayed until **Enter** is pressed without entering something on the line. If a specific number is added after the INSERT command, the specific number of lines will be inserted. For example, I3 will insert 3 blank lines.

WALKTHROUGH: Edit Commands

SCENARIO

This exercise is to familiarize you with the editing features in Source Management. You will use the different editing commands to reinforce this lesson.

```
D B S  INFORMATION EXPERT  -----  PRIMARY OPTION MENU  PM

      ENTER SELECTION BELOW:

      ER - EXPERT REPORTING
      SM - SOURCE MANAGEMENT
      JS - JOB PREPARATION & SUBMISSION
      RV - REPORT VIEWING
      SA - SYSTEM ADMINISTRATION
      MR - EXPERT MANAGEMENT REPORTING
      EN - END THE SESSION

      SELECTION ==>  _____
      LIBRARY  ==>  USERXX

ACTION:  ①  _____

PRESS:   ENTER Process           PF1 Help       PF3 End Session
```

1. Type **SMLS** in the ACTION field and press **Enter** to access the *Source Management Directory Listing* screen.

NOTES

```

D B S  INFORMATION EXPERT  ----- SOURCE MANAGEMENT DIRECTORY LISTING  SMLS

LIBRARY: USERXX                NUMBER OF MEMBERS: 0005  MAXIMUM: 0225
FIND: _____

MEMBER NAME                      TYPE                LAST UPDATE INFO  NBR RECDS
-----
2 C-U-GL-DETAIL-LEDGER-DAPG67-R  RUN STATEMTS      01-30-2001  MSAUSER          1
  DATAFRAME-LIST                MISC TEXT         10-18-2000  MSAUSER          1
  PREPARATION-JCL                MISC TEXT         04-29-2001  MSAUSER          1
  PRINT-JCL                      MISC TEXT         04-29-2001  MSAUSER          1
  RUN-JCL                        MISC TEXT         10-30-2000  MSAUSER          1
  ****  END OF DIRECTORY  ****

NOTES: Enter S to select member.  Change library by entering new library name
ACTION: _____  PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd
    
```

2. Type **S** before the member C-U-GL-DETAIL-LEDGER-DAPG67-R and press **Enter**.
3. Press **F8** to page forward. Press **F7** to page backward.

```

EDIT RUN STATEMENTS: C-U-GL-DETAIL-LEDGER-DAPG67-R          COLUMNS 001 072
COMMAND INPUT ==>                                         SCROLL ==> HALF
-----+-----1-----+-----2-----+-----3-----+-----4-----+-----5-----+-----6-----+-----7-----
***** ***** TOP OF DATA *****
000100 OPTION          DATE-OPTION ('MM/DD/YYYY')
000200 RUN            C-U-GL-DETAIL-LEDGER-DAPG67
000300 FROM          LIBRARY GLPUBLIC
000400 INTO LIBRARY  4 XXXX
000500 VARIABLE      FROM-EFFECTIVE-DATE
000600 '00/00/0000'
000700 VARIABLE      THRU-EFFECTIVE-DATE
000800 '00/00/0000'
000900 VARIABLE      CURRENT-YEAR-IND
001000 'Y'
001100 VARIABLE      PRIOR-YEAR-CLOSED-OR-NOT
001200 'Y'
001300 SELECT        C-GL-COMPANY-ID
001400 'XXXX'
001500 *SELECT       C-GL-ACCOUNT-ID
001600 * 'XXXXXXXXXXXXXXXXXXXX'
001700 SELECT        C-GL-CENTER-ID

ACTION: _____  1 Help  3 End  5 Find  6 Change  7 Pg Bwd  8 Pg Fwd
    
```

4. Move the cursor to line 4. Type **USERXX** over XXXXXX and press **Enter**.

NOTES

```

EDIT RUN STATEMENTS: C-U-GL-DETAIL-LEDGER-DAPG67-R          COLUMNS 001 072
COMMAND INPUT ==>> 5          SCROLL ==>> HALF
-----1-----2-----3-----4-----5-----6-----7--
***** ***** TOP OF DATA *****
000100 OPTION          DATE-OPTION ('MM/DD/YYYY')
000200 RUN            C-U-GL-DETAIL-LEDGER-DAPG67          ;
000300 FROM          LIBRARY GLPUBLIC                    ;
000400 INTO LIBRARY  USERXX                             ;
000500 VARIABLE      FROM-EFFECTIVE-DATE                 ;
000600 '00/00/0000'                                     ;
000700 VARIABLE      THRU-EFFECTIVE-DATE                 ;
000800 '00/00/0000'                                     ;
000900 VARIABLE      CURRENT-YEAR-IND                    ;
001000 'Y'                                                   ;
001100 VARIABLE      PRIOR-YEAR-CLOSED-OR-NOT           ;
001200 'Y'                                                   ;
001300 SELECT        C-GL-COMPANY-ID                     ;
001400 'XXXX'                                               ;
001500 *SELECT       C-GL-ACCOUNT-ID                     ;
001600 * 'XXXXXXXXXXXXXXXXXXXX'                           ;
001700 SELECT        C-GL-CENTER-ID                      ;

ACTION: _____ 1 Help  3 End  5 Find  6 Change  7 Pg Bwd  8 Pg Fwd
    
```

- Type **C** '00/00/0000' '01/01/2001' on the COMMAND INPUT field and press **Enter**. The date on line 000600 should reflect the change.

```

EDIT RUN STATEMENTS: C-U-GL-DETAIL-LEDGER-DAPG67-R          COLUMNS 001 072
COMMAND INPUT ==>>          SCROLL ==>> HALF
-----1-----2-----3-----4-----5-----6-----7--
***** ***** TOP OF DATA *****
000100 OPTION          DATE-OPTION ('MM/DD/YYYY')
000200 RUN            C-U-GL-DETAIL-LEDGER-DAPG67          ;
000300 FROM          LIBRARY GLPUBLIC                    ;
000400 INTO LIBRARY  USERXX                             ;
000500 VARIABLE      FROM-EFFECTIVE-DATE                 ;
==CHG> '01/01/2001'                                     ;
000700 VARIABLE      THRU-EFFECTIVE-DATE                 ;
000800 6 00/0000'                                         ;
000900 VARIABLE      CURRENT-YEAR-IND                    ;
001000 'Y'                                                   ;
001100 VARIABLE      PRIOR-YEAR-CLOSED-OR-NOT           ;
001200 'Y'                                                   ;
001300 SELECT        C-GL-COMPANY-ID                     ;
001400 'XXXX'                                               ;
001500 *SELECT       C-GL-ACCOUNT-ID                     ;
001600 * 'XXXXXXXXXXXXXXXXXXXX'                           ;
001700 SELECT        C-GL-CENTER-ID                      ;

ACTION: _____ 1 Help  3 End  5 Find  6 Change  7 Pg Bwd  8 Pg Fwd
    
```

- Move the cursor to line 000800. Type '01/31/2001' over the date '00/00/0000' and press **Enter**.

NOTES

```

EDIT RUN STATEMENTS: C-U-GL-DETAIL-LEDGER-DAPG67-R          COLUMNS 001 072
COMMAND INPUT ==>                                         SCROLL ==> HALF
-----1-----2-----3-----4-----5-----6-----7--
***** ***** TOP OF DATA *****
000100 OPTION          DATE-OPTION ('MM/DD/YYYY')
000200 RUN             C-U-GL-DETAIL-LEDGER-DAPG67          ;
000300 FROM           LIBRARY GLPUBLIC                    ;
000400 INTO LIBRARY   USERXX                              ;
000500 VARIABLE       FROM-EFFECTIVE-DATE                 ;
==CHG>  '01/01/2001'                                     ;
000700 VARIABLE       THRU-EFFECTIVE-DATE                 ;
000800 '01/31/2001'                                     ;
000900 VARIABLE       CURRENT-YEAR-IND                    ;
001000 'Y'                                                    ;
001100 VARIABLE       PRIOR-YEAR-CLOSED-OR-NOT           ;
001200 'Y'                                                    ;
001300 SELECT         C-GL-COMPANY-ID                     ;
001400 7 XXX'                                               ;
001500 *SELECT        C-GL-ACCOUNT-ID                     ;
001600 * 'XXXXXXXXXXXXXXXXXXXX'                          ;
001700 SELECT         C-GL-CENTER-ID                     ;

ACTION: _____ 1 Help  3 End  5 Find  6 Change  7 Pg Bwd  8 Pg Fwd
    
```

7. Move the cursor to line 001400. Type **'XX01'** over the company **'XXXX'** and press **Enter**.

```

EDIT RUN STATEMENTS: C-U-GL-DETAIL-LEDGER-DAPG67-R          COLUMNS 001 072
COMMAND INPUT ==>                                         SCROLL ==> HALF
-----1-----2-----3-----4-----5-----6-----7--
***** ***** TOP OF DATA *****
000100 OPTION          DATE-OPTION ('MM/DD/YYYY')
000200 RUN             C-U-GL-DETAIL-LEDGER-DAPG67          ;
000300 FROM           LIBRARY GLPUBLIC                    ;
000400 INTO LIBRARY   USERXX                              ;
000500 VARIABLE       FROM-EFFECTIVE-DATE                 ;
==CHG>  '01/01/2001'                                     ;
000700 VARIABLE       THRU-EFFECTIVE-DATE                 ;
000800 '01/31/2001'                                     ;
000900 VARIABLE       CURRENT-YEAR-IND                    ;
001000 'Y'                                                    ;
001100 VARIABLE       PRIOR-YEAR-CLOSED-OR-NOT           ;
001200 'Y'                                                    ;
001300 SELECT         C-GL-COMPANY-ID                     ;
8 400 'XX01'                                               ;
001500 *SELECT        C-GL-ACCOUNT-ID                     ;
001600 * 'XXXXXXXXXXXXXXXXXXXX'                          ;
001700 SELECT         C-GL-CENTER-ID                     ;

ACTION: _____ 1 Help  3 End  5 Find  6 Change  7 Pg Bwd  8 Pg Fwd
    
```

8. Type **I** over the line number 001400 and press **Enter**. Type **'XX02'** ; on the blank line. (Don't forget the semicolon at the end.) Press **Enter** twice.

NOTES

```

EDIT RUN STATEMENTS: C-U-GL-DETAIL-LEDGER-DAPG67-R          COLUMNS 001 072
COMMAND INPUT ==> 9          SCROLL ==> HALF
-----1-----2-----3-----4-----5-----6-----7--
***** ***** TOP OF DATA *****
000100 OPTION          DATE-OPTION ('MM/DD/YYYY')
000200 RUN             C-U-GL-DETAIL-LEDGER-DAPG67          ;
000300 FROM           LIBRARY GLPUBLIC                    ;
000400 INTO LIBRARY   USERXX                              ;
000500 VARIABLE       FROM-EFFECTIVE-DATE                 ;
==CHG> '01/01/2001'                                     ;
000700 VARIABLE       THRU-EFFECTIVE-DATE                 ;
000800 '01/31/2001'                                     ;
000900 VARIABLE       CURRENT-YEAR-IND                    ;
001000 'Y'                                                    ;
001100 VARIABLE       PRIOR-YEAR-CLOSED-OR-NOT           ;
001200 'Y'                                                    ;
001300 SELECT         C-GL-COMPANY-ID                     ;
001400 'XX01'                                                ;
001410 'XX02'                                                ;
001500 *SELECT        C-GL-ACCOUNT-ID                     ;
001600 * 'XXXXXXXXXXXXXXXXXXXX'                            ;
001700 SELECT         C-GL-CENTER-ID                      ;

ACTION: _____ 1 Help  3 End  5 Find  6 Change  7 Pg Bwd  8 Pg Fwd
    
```

9. Type **CHECK** in the COMMAND INPUT field and press **Enter**. An error message will be displayed on line 000101.

```

EDIT RUN STATEMENTS: C-U-GL-DETAIL-LEDGER-DAPG67-R          COLUMNS 001 072
COMMAND INPUT ==> 10         SCROLL ==> HALF
-----1-----2-----3-----4-----5-----6-----7--
***** ***** TOP OF DATA *****
000100 10 ION          DATE-OPTION ('MM/DD/YYYY')
000101 ** IER-0015 EXPECTING "RUN", FOUND "OPTION"
000200 RUN             C-U-GL-DETAIL-LEDGER-DAPG67          ;
000300 FROM           LIBRARY GLPUBLIC                    ;
000400 INTO LIBRARY   USERXX                              ;
000500 VARIABLE       FROM-EFFECTIVE-DATE                 ;
000600 '01/01/2001'                                     ;
000700 VARIABLE       THRU-EFFECTIVE-DATE                 ;
000800 '01/31/2001'                                     ;
000900 VARIABLE       CURRENT-YEAR-IND                    ;
001000 'Y'                                                    ;
001100 VARIABLE       PRIOR-YEAR-CLOSED-OR-NOT           ;
001200 'Y'                                                    ;
001300 SELECT         C-GL-COMPANY-ID                     ;
001400 'XX01'                                                ;
001410 'XX02'                                                ;
001500 *SELECT        C-GL-ACCOUNT-ID                     ;
001600 * 'XXXXXXXXXXXXXXXXXXXX'                            ;
001700 SELECT         C-GL-CENTER-ID                      ;

ACTION: _____ 1 Help  3 End  5 Find  6 Change  7 Pg Bwd  8 Pg Fwd
    
```

10. Type an * in the first position of line 00100. Type **CHECK** in the COMMAND INPUT field and press **Enter**.

NOTES

```

EDIT RUN STATEMENTS: C-U-GL-DETAIL-LEDGER-DAPG67-R          COLUMNS 001 072
COMMAND INPUT ==> 11          SCROLL ==>
HALF
-----1-----2-----3-----4-----5-----6-----7--
***** ***** TOP OF DATA *****
000100 *OPTION          DATE-OPTION('MM/DD/YYYY')
000200 RUN             C-U-GL-DETAIL-LEDGER-DAPG67          ;
000300 FROM           LIBRARY GLPUBLIC                    ;
000400 INTO LIBRARY   USERXX                              ;
000500 VARIABLE       FROM-EFFECTIVE-DATE                 ;
000600 '01/01/2001'   THRU-EFFECTIVE-DATE                 ;
000700 VARIABLE       THRU-EFFECTIVE-DATE                 ;
000800 '01/31/2001'   CURRENT-YEAR-IND                    ;
000900 VARIABLE       PRIOR-YEAR-CLOSED-OR-NOT           ;
001000 'Y'
001100 VARIABLE       C-GL-COMPANY-ID                     ;
001200 'Y'
001300 SELECT         C-GL-ACCOUNT-ID                     ;
001400 'XX01'
001410 'XX02'
001500 *SELECT        C-GL-ACCOUNT-ID                     ;
001600 * 'XXXXXXXXXXXXXXXXXXXX'                           ;

ACTION: _____ 1 Help 3 End 5 Find 6 Change 7 Pg Bwd 8 Pg Fwd
    
```

11. Type **CANCEL** in the COMMAND INPUT field and press .

```

D B S INFORMATION EXPERT ----- SOURCE MANAGEMENT DIRECTORY LISTING SMLS
LIBRARY: USERXX          NUMBER OF MEMBERS: 0005  MAXIMUM: 0225
FIND: _____
MEMBER NAME              TYPE          LAST UPDATE INFO      NBR RECDS
-----
C-U-GL-DETAIL-LEDGER-DAPG67-R  RUN STATEMTS  01-30-2001  MSAUSER          1
DATAFRAME-LIST              MISC TEXT    10-18-2000  MSAUSER          1
PREPARATION-JCL             MISC TEXT    04-29-2001  MSAUSER          1
PRINT-JCL                   MISC TEXT    04-29-2001  MSAUSER          1
RUN-JCL                      MISC TEXT    10-30-2000  MSAUSER          1
****  END OF DIRECTORY  ****

NOTES: Enter S to select member.  Change library by entering new library name
ACTION: 12 _____  PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd
    
```

12. Type **PM** in the ACTION field and press .

NOTES

Report Viewing

Report outputs are viewed and printed using the *Report Viewing (RV)* menus and screens. The *Report Viewing* menu can be accessed from the *Primary Option Menu*, or by typing **RV** in the ACTION field. The options are explained below.

```
D B S INFORMATION EXPERT ----- PRIMARY OPTION MENU PM

      ENTER SELECTION BELOW:

      ER - EXPERT REPORTING
      SM - SOURCE MANAGEMENT
      JS - JOB PREPARATION & SUBMISSION
      RV - REPORT VIEWING
      SA - SYSTEM ADMINISTRATION
      MR - EXPERT MANAGEMENT REPORTING
      EN - END THE SESSION

      SELECTION ==> ___
      LIBRARY ==> USERXX

ACTION: _____

PRESS:      ENTER Process          PF1 Help    PF3 End Session
```

```
D B S INFORMATION EXPERT ----- REPORT VIEWING MENU RV

      ENTER SELECTION BELOW:

      LS - LIST THE SERIES
      VW - VIEW A SERIES
      UT - DELETE A SERIES
      RE - RETURN TO PRIMARY OPTION MENU

      SELECTION ==> ___
      SERIES NAME ==> _____
      LIBRARY NAME ==> USERXX

ACTION: _____

PRESS:      ENTER Process    PF1 Help    PF3 Return to Primary Option Menu
```

 **Fastpath:** Type **RVLS** in the ACTION field to move directly to the *Report Viewing Series List* screen.

Report Viewing Directory Listing (RVLS)

The *Report Viewing Directory Listing (RVLS)* screen is available from the *RV Menu* screen. The *RVLS* screen provides a list of report outputs available for viewing or printing.

NOTES

```

D B S  INFORMATION EXPERT  -----  REPORT VIEWING DIRECTORY  RVLS

LIBRARY: FINANXX                      NUMBER OF MEMBERS: 0002  MAXIMUM: 0225
FIND: _____
SERIES NAME                          TYPE          NOTES:
-----
C-U-GL-DETAIL-LEDGER-DAPG67          RPT SERIES   Place an S beside the
C-U-PS-RECYCLED-PAPER                 PREP LIST    series to be viewed &
                                         press the ENTER key.

****  END OF DIRECTORY  ****

Place a P beside the
series to be printed &
press the ENTER key.

To change libraries,
enter the name of the
new library & press
the ENTER key.

Enter S to view or P to print member.  Key over library to change libraries.
ACTION: _____  PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd
    
```

Report Viewing Types

Report Viewing contains the output of IE processes. There are only two types of these members.

- **RPT SERIES**

The reports are the results of executing Expert Language programs. These reports can be viewed or printed.

- **PREP LIST**

The prep lists are generated when the IE Language is submitted for syntax checking. IE produces a prep list that communicates the results of this process.

Report Request Directory

Once a report series is selected from the Report Viewing Directory, the *Report Request Directory* screen appears. Many report series contain multiple reports. These are report requests within a report series. A report request may be selected for examination or printing from the following screen.

```

D B S  INFORMATION EXPERT  -----  REPORT REQUEST DIRECTORY  JSVRDI

REPORT SERIES C-U-GL-DETAIL-LEDGER-DAPG67          LIBRARY:  USERXX
DATE PREPARED: 10/05/98 13:11:42                 OWNER:    USERXX
DATE RUN:      10/12/98 10:02:03                 NUMBER REPORTS: 001

REPORT      WIDTH  PAGES          NOTES:
-----
GLIST       132    39              Place an S beside the report to
**END**                                          be viewed & press the ENTER key.

Place a P beside the report to
be printed & press the ENTER key.
    
```

NOTES

Report Request Viewing

Once a report request is selected, its contents appear on the screen. Of course, no editing of report views is allowed. Viewing and printing reports will be fully discussed in a later section.

```

D B S INFORMATION EXPERT ----- VIEW A REPORT JSVRDI
SERIES C-U-GL-DETAIL-LEDGER-DAPG67 REPORT: GLIST PAGE 00001 LINE 001
COMMAND INPUT => COLUMNS 001 079
-----1-----2-----3-----4-----5-----6-----7--
RMSID11 STATE OF NORTH CAROLINA GENERAL LEDGE
GLIST DETAIL TRANSACTION LEDGER
1101 DEPARTMENT OF LABOR FOR THE PERIOD 08/01/98 - 09/30

CENTER: 1110 COMMISSIONER'S OFFICE

EFF DATE DOCUMENT ENTY ADDITIONAL DESCRIPTIVE INFO -----
ACCOUNT 533110 GENERAL OFFICE SUPPLIES
08/19/98 372515-001 11PT RALEIGHOFFICESU / 081998 2084
08/19/98 372515-001 11PT RALEIGHOFFICESU / 081998 2084
08/20/98 373100-001 11PT RALEIGHOFFICESU / 082098 2089
08/20/98 373100-001 11PT RALEIGHOFFICESU / 082098 2089
08/20/98 375360-001 11PT RALEIGHOFFICESU / 082098 2089
08/20/98 375360-001 11PT RALEIGHOFFICESU / 082098 2089
08/21/98 373852-001 11PT RALEIGHOFFICESU / 082198 2096
08/21/98 373852-001 11PT RALEIGHOFFICESU / 082198 2096
-----
08 * PERIOD BALANCE *
ACTION: _____ PF: 3 End 4 Nxt Rpt 6 Top 7 Pg Bwd 8 Pg Fwd 9 Last Pg
    
```

```

D B S INFORMATION EXPERT ----- VIEW A REPORT JSVRPS
SERIES C-U-GL-DETAIL-LEDGER-DAPG67 REPORT: GLIST PAGE 00001 LINE 001
COMMAND INPUT => COLUMNS 001 079
-----1-----2-----3-----4-----5-----6-----7--
RMSID11 STATE OF NORTH CAROLINA GENERAL LEDGE
GLIST DETAIL TRANSACTION LEDGER
1101 DEPARTMENT OF LABOR FOR THE PERIOD 08/01/98 - 09/30

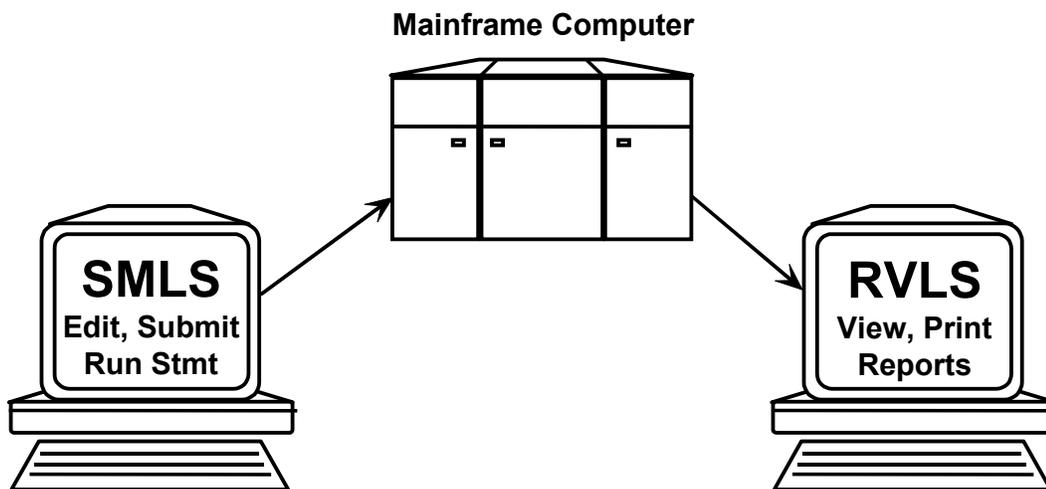
CENTER: 1110 COMMISSIONER'S OFFICE

EFF DATE DOCUMENT ENTY ADDITIONAL DESCRIPTIVE INFO -----
ACCOUNT 533110 GENERAL OFFICE SUPPLIES
08/19/98 372515-001 11PT RALEIGHOFFICESU / 081998 2084
08/19/98 372515-001 11PT RALEIGHOFFICESU / 081998 2084
08/20/98 373100-001 11PT RALEIGHOFFICESU / 082098 2089
08/20/98 373100-001 11PT RALEIGHOFFICESU / 082098 2089
08/20/98 375360-001 11PT RALEIGHOFFICESU / 082098 2089
08/20/98 375360-001 11PT RALEIGHOFFICESU / 082098 2089
08/21/98 373852-001 11PT RALEIGHOFFICESU / 082198 2096
08/21/98 373852-001 11PT RALEIGHOFFICESU / 082198 2096
-----
08 * PERIOD BALANCE *
ACTION: _____ PF: 3 End 4 Nxt Rpt 6 Top 7 Pg Bwd 8 Pg Fwd 9 Last Pg
    
```

The IE Process

NOTES

Information Expert reports are generated by submitting a RUN member. The RUN member tells the mainframe computer to execute a report series that has been “prepared” to produce a report. The RUN member can be edited to change selection criteria and report from and to dates, where applicable. The data files found in the RUN-JCL member provide the information needed for the reporting process. The reports are generated and sent to the user’s report viewing library. Reports can then be viewed and printed. Very large reports can be sent directly to a printer. The PRINT-JCL member can be changed to allow users to select different printers. The RUN-JCL member can be changed to allow reports to access purged or history information.



Selecting an IE Report

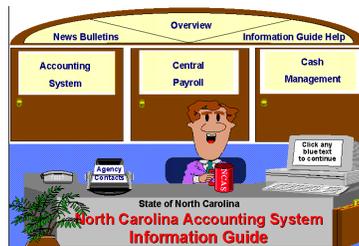


Overview

The last section, *Understanding Basic IE Concepts*, introduced libraries, source members, and report views. This section explains the process of selecting a report by examining source members and choosing a run statement. The user must decide what parameters are needed to define the report from the chosen run statement parameters.

The North Carolina Accounting System Information Guide (SIG) is the best source for up-to-date information about IE reports. The SIG contains extensive documentation of most IE reports including:

- Information about each report's IE library
- Suggested uses
- Report content: column headings, totals, and layout
- A copy of the run statement (included for most reports)



The following walkthrough shows you how to locate the DAPG67 report and documentation in the SIG.

WALKTHROUGH: Use the SIG to Locate the DAPG67 Report

SCENARIO

You have been told that the SIG contains information regarding the DAPG67 report and additional documentation concerning that report. Use the following steps to examine the report and documentation available for the DAPG67.

NOTES

The SIG is now located on the Internet. To access the SIG:

1. Double click on the icon for the Internet Explorer.



2. Click on the OSC folder on the personal toolbar.
3. Click on SIG from the drop-down menu.

 The address of this site is:
http://www.ncosc.net/sigdocs/sig_docs/index.html

You are now in the SIG.

4. Click on the **Documentation** heading.
5. Locate the **Mainframe Reports** section halfway down the right side of the screen.
6. Locate the **Report Libraries** section under the Mainframe Reports section.
7. Click on the **General Ledger** blue text to view the GLPUBLIC library.
8. Click on **Trial Balances and Ledger Reports**.
9. Locate the **Detail Transaction Ledger** for C-U-GL-DETAIL-LEDGER-DAPG67.
10. Click on the blue text labeled **Detail Transaction Ledger**.
11. Review the documentation.
12. Click the **BACK** button. Review the documentation for **C-U-GL-DTL-LEDGER-DAPG67-EOY**. Note the name of the RUN member.

 If you are having problems accessing the SIG, please notify the OSC Support Services Center at (919) 707-0795.

COMPUTER ACTIVITY: Exploring the SIG

SCENARIO

While in the SIG, explore the News section. Under the News section title, check the New Updates. The Important Memo section provides copies of all OSC memos. Also check under the Hot Topics section for vitally important (and sometimes time sensitive) information. Experiment with the Search and Find feature under the Hot Topics section.

Selecting a Report

NOTES

Once you have reviewed the documentation on the SIG and have selected a report series, we are ready to go to IE and find the RUN member for the report series. A RUN member will always be typed RUN STATEMTS. The RUN member name is usually the same name as the report series, with –RUN at the end. If the report series name is long, a variation of the name and –RUN will be used. Below is an example from the GLPUBLIC library displaying report series and their run statements.

```

D B S  INFORMATION EXPERT ----- SOURCE MANAGEMENT DIRECTORY LISTING  SMLS
LIBRARY: GLPUBLIC                      NUMBER OF MEMBERS: 0142  MAXIMUM: 0225
FIND: _____
MEMBER NAME                               (TYPE)  LAST UPDATE INFO  NBR RECDS
-----
AAA-LIBRARY-NEWS                          MISC TEXT  01-23-2001 MSAUSER      35
C-ALPHA-NUMERIC-2                          SUBROUTINE 01-23-2001 MSAUSER        1
C-CONVERT-CENTER-MASK                      SUBROUTINE 01-23-2001 MSAUSER        2
C-CONVERT-DATE-2                          SUBROUTINE 01-23-2001 MSAUSER        1
C-CONVERT-DATE-3                          SUBROUTINE 01-23-2001 MSAUSER        1
C-U-GL-BD70-REPORT                        RPT SERIES 01-23-2001 MSAUSER       13
C-U-GL-BD70-REPORT-DET                    RPT SERIES 01-23-2001 MSAUSER       15
C-U-GL-BD70-REPORT-DET-RUN                (RUN STATEMTS) 01-23-2001 MSAUSER        1
C-U-GL-BD70-REPORT-RUN                    (RUN STATEMTS) 01-23-2001 MSAUSER        1
C-U-GL-BD701-AUTH-PROJ-RPT                RPT SERIES 01-23-2001 MSAUSER       12
C-U-GL-BD701-AUTH-PROJ-RPT-RUN            RUN STATEMTS 01-23-2001 MSAUSER        1
C-U-GL-BD701-AUTH-REPORT                  RPT SERIES 01-23-2001 MSAUSER       27
C-U-GL-BD701-AUTH-REPORT-RUN              RUN STATEMTS 01-23-2001 MSAUSER        1
C-U-GL-BD701-AUTH-RPT-PYR                 RPT SERIES 01-23-2001 MSAUSER       26
C-U-GL-BD701-AUTH-RPT-PYR-RUN            RUN STATEMTS 01-23-2001 MSAUSER        1
NOTES: Enter S to select member.  Change library by entering new library name
ACTION: _____  PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd

```

A report series can be executed from the product public libraries. The OSC insures that the report series in the product public libraries are kept up to date. Some agencies have copies of report series in their own agency libraries. If you are running the report series found in the agency library, make sure changes are kept up to date. Review the member AAA-LIBRARY-NEWS to see when the last time a report series was updated.

Model RUN members have been created for each report series. The RUN member found in the product public library can be accessed and changed, but the changes cannot be saved. The RUN member can be submitted with the changes, invoking the report series to run according to the criteria submitted. RUN members can also be copied to your agency library. Changes to RUN members can be saved in the agency library.

The Run Statement

An IE report is produced by submitting a RUN member. A run statement is contained in the RUN member. Each run statement instructs IE to execute a report series. The run statement also provides a method for the user to specify data criteria to determine the data that should be included or excluded on a report.

NOTES

```

EDIT RUN STATEMENTS: C-U-GL-DETAIL LEDGER-DAPG67-R          COLUMNS 001 072
COMMAND INPUT ==>                                         SCROLL ==> HALF
-----1-----2-----3-----4-----5-----6-----7--
***** ***** TOP OF DATA *****
000100 OPTION          DATE-OPTION ('MM/DD/YYYY')
000200 RUN            C-U-GL-DETAIL-LEDGER-DAPG67          ;
000300 FROM          LIBRARY GLPUBLIC                    ;
000400 INTO LIBRARY XXXXXX                               ;
000500 VARIABLE      FROM-EFFECTIVE-DATE                 ;
000600 '00/00/0000'                                     ;
000700 VARIABLE      THRU-EFFECTIVE-DATE                 ;
000800 '00/00/0000'                                     ;
000900 VARIABLE      CURRENT-YEAR-IND                    ;
001000 'Y'                                                  ;
001100 VARIABLE      PRIOR-YEAR-CLOSED-OR-NOT            ;
001200 'Y'                                                  ;
001300 SELECT        C-GL-COMPANY-ID                      ;
001400 'XXXX'                                               ;
001500 *SELECT       C-GL-ACCOUNT-ID                      ;
001600 * 'XXXXXXXXXXXXXXXXXXXX'                           ;
001700 SELECT        C-GL-CENTER-ID                       ;

ACTION: _____ 1 Help   3 End   5 Find  6 Change  7 Pg Bwd  8 Pg Fwd
    
```

Run Statement Format

The run statement begins on the line following the TOP OF DATA line. The numbers to the left of each line are sequence numbers. Line editing commands are placed over line sequence numbers.

A run statement can continue to more than one line. All the lines that are part of the run statement must contain a **semicolon** at the end to indicate continuation. **The last line of the run statement would not contain a semicolon.**

Any line with an * in the first column is a comment. These lines are not executed and are ignored. If there is criteria you do not wish to define, place an * in the first position of the line.

The first line in the RUN member may be an OPTION card. This is not part of the run statement, but an IE control card used to define run options. Most of the run members have an OPTION card defining how the dates display.

OPTION DATE-OPTION ('MM/DD/YYYY')

This OPTION card says the format of the dates will be month, day, and year separated by slashes. The year will contain the century. This option card governs how dates will be interpreted. This also governs how your dates will appear in your run statement. This is a necessary control card.

Results will be unpredictable if the report series is executed without this card.

NOTES

Dates in a RUN member MUST conform to the DATE-OPTION format. If an OPTION DATE-OPTION control card is not included in a RUN member, the default date option will be used. Refer to **Procedure 10** to learn how to view and update your default date format.

The first line of the run statement contains the word RUN and then the report series you wish to execute. The report series must have been successfully prepared before it can be run. All report series in the product public libraries have been successfully prepared.

The FROM LIBRARY line tells IE what library to find the report series. This means the report series has been prepared in this library. In this example, the report series has been prepared in GLPUBLIC and that is the version you want to execute. The report series could also be in other libraries, including your agency library, but the FROM LIBRARY statement directs IE to the correct version. If the FROM LIBRARY is left off (or made into a comment), the report series will be executed from the user's default library. If you execute from your agency's library, remember to make sure the version has all the updates. Check AAA-LIBRARY-NEWS to verify your version.

The INTO LIBRARY XXXXXXXX tells IE where to put the report results. This normally would be one of your agency's public libraries. When running a report series from a product public library, you should always have the INTO LIBRARY statement.

The SELECT, EXCLUDE, and VARIABLE statements provide report criteria that determine which data is to appear on the report. The report criteria may consist of single values, multiple values, or a range of values.

- **SELECT Statement**

A SELECT statement causes data to be **included** in the report, based on the specified value(s). Records that do not meet the selection criteria do not display in the report. For example, SELECT GL-COMPANY-ID '1234' would instruct the report series to only include data from company 1234 for the report.

- **EXCLUDE Statement**

An EXCLUDE statement **excludes** data from the report, based on the value(s) specified. Records that meet the exclusion criteria do not display in the report. For example, EXCLUDE GL-COMPANY-ID '1234' would instruct the report series to exclude data for company 1234 in the report.

- **Variable Statement**

A variable statement passes additional information to an IE report. Variables can only be set to one value. Some examples of a variable might be the accounting period, or a "from" or "to" date range to evaluate.

NOTES

The following walkthrough demonstrates how to select an IE report.

WALKTHROUGH: Selecting a Report

SCENARIO

The auditors requested that you prepare an analysis of the activity in account 532850 for a previous fiscal year. We have reviewed the documentation on the SIG and have identified the C-U-GL-DTL-LEDGER-DAPG67-EOY as a report that will meet the auditor's need. The report series is in GLPUBLIC. We now want to copy the RUN member for that report series into our agency library for modification.

1. Type **SM** in any ACTION field and press **Enter** to select the *Source Management Menu* screen.

```
D B S  INFORMATION EXPERT  -----  SOURCE MANAGEMENT FACILITY  SM

      ENTER SELECTION BELOW:

      LS - DISPLAY MEMBER LIST
      CR - CREATE A NEW MEMBER
      CH - CHANGE A MEMBER
      UT - COPY/DELETE/RENAME/MERGE MEMBERS
      RE - RETURN TO PRIMARY OPTION MENU

      SELECTION   ===> 2
      MEMBER NAME ===>
      LIBRARY NAME ===> USER23

ACTION: _____

PRESS:  ENTER Process  PF1 Help  PF3 Return to Primary Option Menu
```

2. Type **UT** in the SELECTION field and press **Enter**. When the *SMUT* screen is displayed, press **Enter**.

NOTES

```
D B S INFORMATION EXPERT ----- SOURCE MANAGEMENT UTILITIES JSMLDU
LIBRARY: 3RXX                      NUMBER OF MEMBERS: 0005 MAXIMUM: 0225
FIND: _____ DEFAULT "COPY TO" LIBRARY: USER23
                RENAME/COPY TO          COPY TO
MEMBER NAME      MEMBER NAME          LIBRARY
-----
C-U-GL-DETAIL-LEDGER-DAPG67-R
DATAFRAME-LIST
PREPARATION-JCL
PRINT-JCL
RUN-JCL
**** END OF DIRECTORY ****

ACTION: _____ PF1 Help PF3 End PF6 Top PF7 Pg Bwd PF8 Pg Fwd
```

3. Type **GLPUBLIC** in the LIBRARY field and press **Enter**. The product library for General Ledger will be displayed.

```
D B S INFORMATION EXPERT ----- SOURCE MANAGEMENT UTILITIES JSMLDU
LIBRARY: GLPUBLIC                   NUMBER OF MEMBERS: 0142 MAXIMUM: 0225
FIND: 4 _____ DEFAULT "COPY TO" LIBRARY: GLPUBLIC
                RENAME/COPY TO          COPY TO
MEMBER NAME      MEMBER NAME          LIBRARY
-----
AAA-LIBRARY-NEWS
C-ALPHA-NUMERIC-2
C-CONVERT-CENTER-MASK
C-CONVERT-DATE-2
C-CONVERT-DATE-3
C-U-GL-BD70-REPORT
C-U-GL-BD70-REPORT-DET
C-U-GL-BD70-REPORT-DET-RUN
C-U-GL-BD70-REPORT-RUN
C-U-GL-BD701-AUTH-PROJ-RPT
C-U-GL-BD701-AUTH-PROJ-RPT-RUN
C-U-GL-BD701-AUTH-REPORT
C-U-GL-BD701-AUTH-REPORT-RUN
C-U-GL-BD701-AUTH-RPT-PYR
C-U-GL-BD701-AUTH-RPT-PYR-RUN

ACTION: _____ PF1 Help PF3 End PF6 Top PF7 Pg Bwd PF8 Pg Fwd
```

4. Type **C-U-GL-DTL-LED** in the FIND field and press **Enter**.

NOTES

```

D B S  INFORMATION EXPERT ----- SOURCE MANAGEMENT UTILITIES  JSMLDU

LIBRARY: GLPUBLIC                      NUMBER OF MEMBERS: 0142  MAXIMUM: 0225
FIND: _____  DEFAULT "COPY TO" LIBRARY: GLPUBLIC

MEMBER NAME                            RENAME/COPY TO          COPY TO
-----                            -----                -----
5 C-U-GL-DTL-LEDGER-DAPG67-E-RUN        5
C-U-GL-DTL-LEDGER-DAPG67-EOY
C-U-GL-FEDERAL-COST
C-U-GL-FEDERAL-COST-RUN
C-U-GL-FINES-AND-PENALTIES
C-U-GL-FINES-AND-PENALTIES-RUN
C-U-GL-GASB-CNTR-TRIAL-BAL
C-U-GL-GASB-CNTR-TRIAL-BAL-RUN
C-U-GL-GASB-FUND-TRIAL-BAL
C-U-GL-GASB-FUND-TRIAL-BAL-RUN
C-U-GL-GASB-TRANSFERS
C-U-GL-GASB-TRANSFERS-RUN
C-U-GL-GASB-TRANSFERS-RXX
C-U-GL-GASB-TRIAL-BAL-AGEN-RUN
C-U-GL-GASB-TRIAL-BAL-AGENCY

ACTION: _____  PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd
    
```

- Type **C** before the member C-U-GL-DTL-LEDGER-DAPG67-E-RUN. Press **Tab** to go to the COPY TO LIBRARY field. Type **USERXX** and press **Enter**. You should receive a confirmation that the member was copied.

```

D B S  INFORMATION EXPERT ----- SOURCE MANAGEMENT UTILITIES  JSMLDU

LIBRARY: 6UBLIC                          NUMBER OF MEMBERS: 0142  MAXIMUM: 0225
FIND: _____  DEFAULT "COPY TO" LIBRARY: GLPUBLIC

MEMBER NAME                            RENAME/COPY TO          COPY TO
-----                            -----                -----
C-U-GL-DTL-LEDGER-DAPG67-E-RUN        ** COPIED **
C-U-GL-DTL-LEDGER-DAPG67-EOY
C-U-GL-FEDERAL-COST
C-U-GL-FEDERAL-COST-RUN
C-U-GL-FINES-AND-PENALTIES
C-U-GL-FINES-AND-PENALTIES-RUN
C-U-GL-GASB-CNTR-TRIAL-BAL
C-U-GL-GASB-CNTR-TRIAL-BAL-RUN
C-U-GL-GASB-FUND-TRIAL-BAL
C-U-GL-GASB-FUND-TRIAL-BAL-RUN
C-U-GL-GASB-TRANSFERS
C-U-GL-GASB-TRANSFERS-RUN
C-U-GL-GASB-TRANSFERS-RXX
C-U-GL-GASB-TRIAL-BAL-AGEN-RUN
C-U-GL-GASB-TRIAL-BAL-AGENCY

ACTION: 7 _____  PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd
    
```

- Type **USERXX** in the LIBRARY field and press **Enter**.
- Type **SMLS** in the ACTION field and press **Enter**.

RUN-JCL

NOTES

We discussed the RUN-JCL member that appears in your source library in the previous section. This member contains the mainframe control language necessary to execute a report series. This member should be reviewed to ensure the correct data files are being accessed. There may be times that you will need to modify this member. Below is a discussion of some of the fields in this member.

```
EDIT MISC TEXT: RUN-JCL                                COLUMNS 001 072
COMMAND INPUT ==>                                     SCROLL ==> HALF
-----1-----2-----3-----4-----5-----6-----7--
***** ***** TOP OF DATA *****
000100 //FAAIER23 JOB (OSCFAAIE,B65,'IE RUN'),'A.TOONG 981-5459',
000200 //      CLASS=H,MSGCLASS=2,REGION=2048K,NOTIFY=TS65C13,TIME=NOLIMIT
000300 //*
000400 //PROCLIB DD DSN=OSC.FAA.IE9601.PROCLIB,DISP=SHR
000500 //*
000600 //EXECIE EXEC ERJCEXEC
000700 .M
000800 //*
000900 //*****
001000 //* THIS JCL WAS LAST UPDATED 02-03-98
024900 //*****
025000 //* GL DD STATEMENTS
025100 //*****
025700 //*
029400 //GLFMBUD DD DSN=OSC.OPC.VSAM.GL.GLFMBUD,
029500 //      DISP=SHR
029600 //DETAIL DD DSN=OSC.FAA.GL.GLTRAIN.DETAIL,DISP=SHR

ACTION: _____ 1 Help 3 End 5 Find 6 Change 7 Pg Bwd 8 Pg Fwd
```

The RUN-JCL member can be edited in the same manner as all other source members. All editing commands can be used except CHECK and SUBMIT.

All control cards begin with a //. If an * appears after the //, that line is considered a comment line and is ignored.

```
000100 //FAAIER23 JOB (OSCFAAIE,B65,'IE RUN'),'A.TOONG 981-5459',
000200 //      CLASS=H,MSGCLASS=2,REGION=2048K,NOTIFY=TS65C13,TIME=NOLIMIT
```

The first control card is called your JOB card. The name that appears after the // is called the job name. In the previous example the job name is FAAIER23. If you are having a problem running a report series, knowing the job name will assist the OSC Support Services Center in solving the problem.

There is another field on the JOB card that is useful in problem solving. The NOTIFY tells the mainframe who has authority to look at the program that was submitted to run. The OSC Support Services Center may ask you to change the NOTIFY to their identifier. This will allow the OSC Support Services Center to view the submitted program to determine the problem.

```
029600 //DETAIL DD DSN=OSC.FAA.GLIE01.DETAIL,DISP=SHR
029610 //*DETAIL DD DSN=OSC.FAA.C41GL.GLDETAIL.EOY,DISP=SHR
```

NOTES

The detail ledgers reports that are available to agencies use a file called the "DETAIL" file. This file contains the individual posting transactions for the current fiscal year. If the previous year has not been closed, the previous year is also on this file. When running the C-U-GL-DETAIL-LEDGER-DAPG67 against the current fiscal year, or the previous fiscal year that has not been closed, the following file is necessary in your RUN-JCL member.

```
//DETAIL DD DSN=OSC.OP*.CAAGL.DETAIL,DISP=SHR  
(where AA is your agency number)  
For DHHS:  
//DETAIL DD DSN=OSC.OPF.DHRGL.GLDETAIL,DISP=SHR  
For Agriculture:  
//DETAIL DD DSN=OSC.OPF.AGRGL.GLDETAIL,DISP=SHR
```

If the previous fiscal year has been closed, or you want to run a DAPG67 against a historical fiscal year, you need to run C-U-GL-DTL-LEDGER-DAPG67-EOY. Your JCL must contain one of the following files.

```
//DETAILY DD DSN=OSC.OP*.GL.DETAIL.FYXX,DISP=SHR
```

Change **FYXX** based on the fiscal year desired. When the previous fiscal year is closed, the OSC creates a file for each agency that only contains their detail transactions for that closed year. The DETAILY JCL statement could be modified to read:

```
//DETAILY DD DSN=OSC.OP*.CAAGL.DETAIL.EOY,DISP=SHR  
(where AA is your agency number)  
For DHHS:  
//DETAILY DD DSN=OSC.OPF.DHRGL.GLDETAIL.EOY,DISP=SHR  
For Agriculture:  
//DETAIL DD DSN=OSC.OPF.AGRGL.GLDETAIL.EOY,DISP=SHR
```

WALKTHROUGH: Modifying JCL

SCENARIO

We have identified the C-U-GL-DTL-LEDGER-DAPG67-EOY as a report we want to run to meet the auditor's need. We have copied the RUN member to our user library. Before running the report, we need to check our JCL to insure the correct historical file is being used.

1. Type **SMLS** in the ACTION field and press .

NOTES

```

D B S  INFORMATION EXPERT  ----- SOURCE MANAGEMENT DIRECTORY LISTING  SMLS
LIBRARY: USERXX                NUMBER OF MEMBERS: 0005  MAXIMUM: 0225
FIND: _____

MEMBER NAME                    TYPE                LAST UPDATE INFO  NBR RECDS
-----
C-U-GL-DETAIL-LEDGER-DAPG67-R  RUN STATEMTS      01/31/2001 0000XX  1
C-U-GL-DTL-LEDGER-DAPG67-E-RUN  RUN STATEMTS      01/31/2001 0000XX  1
DATAFRAME-LIST                  MISC TEXT         10-18-2000 MSAUSER  1
PREPARATION-JCL                 MISC TEXT         04-29-2001 MSAUSER  1
PRINT-JCL                       MISC TEXT         04-29-2001 MSAUSER  1
2 RUN-JCL                       MISC TEXT         01-31-2001 0000XX  1
****  END OF DIRECTORY  ****

NOTES: Enter S to select member.  Change library by entering new library name
ACTION: _____  PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd
    
```

2. Type **S** before the member RUN-JCL and press **Enter**.

```

EDIT MISC TEXT: RUN-JCL                COLUMNS 001 072
COMMAND INPUT ==>                      SCROLL ==> HALF
-----+-----1-----+-----2-----+-----3-----+-----4-----+-----5-----+-----6-----+-----7-----
*****  ***** TOP OF DATA *****
000900 //*****
001000 /* THIS JCL WAS LAST UPDATED 02-03-98
024900 //*****
025000 /*  GL DD STATEMENTS
025100 //*****
025700 /*
029400 //GLFMBUD  DD DSN=OSC.OPC.VSAM.GL.GLFMBUD,
029500 //          DISP=SHR
029600 //DETAIL  DD DSN=OSC.FAA.GL.GLTRAIN.DETAIL,DISP=SHR
029601 /*DETAILY DD DSN=OSC.FAA.C41GL.GLDETAIL.EOY,DISP=SHR
029610 //GMP11   DD DSN=OSC.FAA.VSAM.GLTRAIN.GMP11,
029700 //          DISP=SHR
029710 //TM700  DD DSN=OSC.FAA.VSAM.GLTRAIN.TM700,
029720 //          DISP=SHR
029730 //MASTER DD DSN=OSC.FAA.VSAM.GLTRAIN.TM700,
029740 //          DISP=SHR
030000 //GMP11   DD DSN=OSC.FAA.VSAM.GLTRAIN.GMP21,
030100 //          DISP=SHR

ACTION: _____  1 Help  3 End  5 Find  6 Change  7 Pg Bwd  8 Pg Fwd
    
```

3. Press **F8**. Find the line with **/*DETAILY**.

NOTES

```

EDIT MISC TEXT: RUN-JCL                                COLUMNS 001 072
COMMAND INPUT ==>                                     SCROLL ==> HALF
-----+-----1-----+-----2-----+-----3-----+-----4-----+-----5-----+-----6-----+-----7--
***** ***** TOP OF DATA *****
000900 //*****
001000 /* THIS JCL WAS LAST UPDATED 02-03-98
024900 //*****
025000 /*    GL DD STATEMENTS
025100 //*****
025700 /*
029400 //GLFMBUD   DD DSN=OSC.OPC.VSAM.GL.GLFMBUD,
029500 //          DISP=SHR
029600 //DETAIL   DD DSN=OSC.FAA.GL.GLTRAIN.DETAIL,DISP=SHR
029601 4 *DETAIFY DD DSN=OSC.FAA.C41GL.GLDETAIL.EOY,DISP=SHR
029610 //GMP11    DD DSN=OSC.FAA.VSAM.GLTRAIN.GMP11,
029700 //          DISP=SHR
029710 //TM700   DD DSN=OSC.FAA.VSAM.GLTRAIN.TM700,
029720 //          DISP=SHR
029730 //MASTER  DD DSN=OSC.FAA.VSAM.GLTRAIN.TM700,
029740 //          DISP=SHR
030000 //GMP11    DD DSN=OSC.FAA.VSAM.GLTRAIN.GMP21,
030100 //          DISP=SHR

ACTION: _____ 1 Help 3 End 5 Find 6 Change 7 Pg Bwd 8 Pg Fwd

```

4. Change the **/*DETAIFY** to **//DETAIFY** and press **Enter**.

```

EDIT MISC TEXT: RUN-JCL                                COLUMNS 001 072
COMMAND INPUT ==> 5                                     SCROLL ==> HALF
-----+-----1-----+-----2-----+-----3-----+-----4-----+-----5-----+-----6-----+-----7--
***** ***** TOP OF DATA *****
000900 //*****
001000 /* THIS JCL WAS LAST UPDATED 02-03-98
024900 //*****
025000 /*    GL DD STATEMENTS
025100 //*****
025700 /*
029400 //GLFMBUD   DD DSN=OSC.OPC.VSAM.GL.GLFMBUD,
029500 //          DISP=SHR
029600 //DETAIL   DD DSN=OSC.FAA.GL.GLTRAIN.DETAIL,DISP=SHR
029601 //DETAIFY DD DSN=OSC.FAA.C41GL.GLDETAIL.EOY,DISP=SHR
029610 //GMP11    DD DSN=OSC.FAA.VSAM.GLTRAIN.GMP11,
029700 //          DISP=SHR
029710 //TM700   DD DSN=OSC.FAA.VSAM.GLTRAIN.TM700,
029720 //          DISP=SHR
029730 //MASTER  DD DSN=OSC.FAA.VSAM.GLTRAIN.TM700,
029740 //          DISP=SHR
030000 //GMP11    DD DSN=OSC.FAA.VSAM.GLTRAIN.GMP21,
030100 //          DISP=SHR

ACTION: _____ 1 Help 3 End 5 Find 6 Change 7 Pg Bwd 8 Pg Fwd

```

5. Type **SAVE** on the command input line and press **Enter**. Press **F3** to exit.

SUMMARY

You have just learned to review the documentation for available reports. You have also learned to select a RUN member and copy it to your user library. You have reviewed your RUN-JCL to insure the correct data files are being used.

Requesting an IE Report



Overview

The previous section explained how to use the Source Management Utility to select RUN members. This section will explain how to use the full screen editor to request a report by editing and submitting the run statement.

Editing with the SM Text Editor

The Source Management Text Editor, which appears when a source member is selected, is a full screen editor. To review the editing commands, refer to the section *Understanding Basic IE Concepts*. Before a RUN member is submitted to execute, changes are necessary. Using the full screen editor, make the changes that are appropriate for the run statement. The run statement will contain “default” criteria that serves as placeholders for most values. To change these defaults, you can type changes directly over the existing text, or use an editing command.

Run Statement Overview

The following illustration depicts a run statement as it appears when selected from the *SMLS* list. Each report criterion includes placeholders that can be edited to produce the desired report. A detailed discussion of this member follows the illustration.

NOTES

```

EDIT RUN STATEMENTS: C-U-GL-DETAIL-LEDGER-DAPG67-R          COLUMNS 001 072
COMMAND INPUT ==>                                         SCROLL ==> HALF
-----1-----2-----3-----4-----5-----6-----7--
***** ***** TOP OF DATA *****
000100 RUN          C-U-GL-DETAIL-LEDGER-DAPG67              ;
000110 FROM LIBRARY GLPUBLIC                                ;
000120 INTO LIBRARY XXXXXXXX                               ;
000200 VARIABLE    FROM-EFFECTIVE-DATE                     ;
000300 '00/00/00'                                     ;
000400 VARIABLE    THRU-EFFECTIVE-DATE                     ;
000500 '00/00/00' PANY-ID                                  ;
000600 VARIABLE    CURRENT-YEAR-IND                        ;
000700 'Y'                                               ;
000800 VARIABLE    PRIOR-YEAR-CLOSED-OR-NOT                ;
000900 'N'                                               ;
001000 SELECT      C-GL-COMPANY-ID                          ;
001100 'XXXX'                                           ;
001200 *SELECT     C-GL-ACCOUNT-ID                          ;
001300 * ('XXXXXXX' 'XXXXXXX')                            ;
001400 SELECT      C-GL-CENTER-ID                          ;
001500 ('SXXXX'   'XXXXXXXXXXXXX' )                        ;

ACTION: _____ 1 Help 3 End 5 Find 6 Change 7 Pg Bwd 8 Pg Fwd
    
```

Run Statement Punctuation

Run statements simplify the process of producing custom IE reports by avoiding complex programming language. The computer must be able to process the run statement to produce a report. The run statement punctuation must be very precise. The user must be very careful when editing run statements. The vast majority of problems encountered in producing IE reports will result from syntax errors in the run statement. Extra care in editing the run statement will pay big dividends and avoid many report errors.

 A failed IE report submission results in not getting a report. No other consequences can result from any IE submissions.

Comments and Asterisks

IE ignores a line with an asterisk in the first column. These lines are used in IE to record comments. In run statements, asterisks are also used to *comment out* lines that are not being used. In the above example, lines 1200 and 1300 will be ignored when the run statement is submitted – as if they had been deleted. IE also ignores blank lines. You can use blank lines to enhance readability.

The Semicolon

Each line in the run statement, *except for the last*, must end with a semicolon. The semicolon indicates that the statement continues on the next line. The last line must not end with a semicolon. A semicolon on the final line would tell IE to look for additional lines. Examine the following RUN STATEMENT.

NOTES

```

EDIT RUN STATEMENTS:  C-U-GL-DETAIL-LEDGER-DAPG67-R          COLUMNS 001 072
COMMAND INPUT ==>>          SCROLL ==>> HALF
-----1-----2-----3-----4-----5-----6-----7--
***** ***** TOP OF DATA *****
000100 RUN          C-U-GL-DETAIL-LEDGER-DAPG67              ;
000110 FROM LIBRARY GLPUBLIC                                ;
000120 INTO LIBRARY XXXXXXXX                               ;
000200 VARIABLE     FROM-EFFECTIVE-DATE                    ;
000300 '00/00/00'                                       ;
000400 VARIABLE     THRU-EFFECTIVE-DATE                    ;
000500 '00/00/00' PANY-ID                                  ;
000600 VARIABLE     CURRENT-YEAR-IND                       ;
000700 'Y'                                                ;
000800 VARIABLE     PRIOR-YEAR-CLOSED-OR-NOT              ;
000900 'N'                                                ;
001000 SELECT       C-GL-COMPANY-ID                        ;
001100 'XXXX'                                             ;
001200 *SELECT      C-GL-ACCOUNT-ID                        ;
001300 * ('XXXXXXX' 'XXXXXXX')                            ;
001400 SELECT       C-GL-CENTER-ID                        ;
001500 ('SXXXX' 'XXXXXXXXXXXXX' )                          ;

ACTION: _____ 1 Help 3 End 5 Find 6 Change 7 Pg Bwd 8 Pg Fwd
    
```

Lines 100 through 1400 each end with a semicolon. This tells IE that more of the statement will be found on the following line. The final line, line 1500 has no semicolon. This tells IE that this line is the end of the RUN STATEMENT. Note that lines with an asterisk in the first column are comments and are not processed by IE. Semicolons in comment lines have no effect.

A semicolon must be used at the end of each RUN statement line except the last. The last executable line must NOT contain a semicolon.

Run Statement Report Criteria

Run statement report criteria allow users to pass values to IE that determine the content of each report. Report criteria work as data filters, including or excluding data records that match the criteria from the report series.

Select

The Select statement is used to select data records to include in a report. Data will appear in the report when the value assigned to the criteria matches the values in the data records. An example of the Select statement is:

```
SELECT C-GL-COMPANY-ID 'ABCD'
```

Exclude

The Exclude statement is used to exclude data records from a report. Data will be excluded from the report when the value assigned to the criteria matches the values in the data records. An example of the Exclude statement is:

```
EXCLUDE C-GL-COMPANY-ID 'ABCD'
```

NOTES

Criteria Punctuation

Special rules apply to each of the following types of criteria.

Numeric Values

Numeric values are pure numbers. They are included in the run statement with no quotation marks. They can contain decimal points and a negative sign (-). No other editing characters are allowed.

Character Values

Character values are referred to as alphanumeric values, meaning both alphabetic and numeric values are acceptable. All character values must be enclosed in single quotes.

 Many data items in the NCAS are alphanumeric items even though their values are commonly numbers. For example, the data item that holds NCAS account numbers is alphanumeric even though most account numbers are made up of numbers only. If the data item is defined as alphanumeric, the data values must be enclosed within single quotes.

Dates

Dates display in the run statement as alphanumeric values, so they must be enclosed in single quotations. The format for most dates is 'MM/DD/YYYY', for example '09/30/1998'. The date separator character used between the month, day, and year values in the run statement must match the default value specified for each user. If the values do not correspond, an error will occur.

The OPTION DATE-OPTION control card governs the format of a date field if it displays in the RUN member. If there is not OPTION DATE-OPTION control card, the default date format for the user will be used. The *Date/Time Display Options* screen found in the User Profile Maintenance menu sets this default format. This screen is accessible from the main *Information Expert* menu. Review **Procedure 10** for information regarding changing the default date format. The OSC will perform this task for any user requesting assistance.

The following values must be entered in the proper format.

SINGLE VALUES

Single values may be specified for report criteria or variable statements by entering them immediately after the data name, or on the next line. The following are examples of single values.

```
SELECT GL-COMPANY-ID      '1001'  
EXCLUDE GL-ACCOUNT-ID    '030000'
```

In this example, all data for company 1001 would be included in the report, except for account 030000.

MULTIPLE VALUES

NOTES

Multiple values can be specified by listing them with a space between the values.

```
SELECT GL-COMPANY-ID    '1001' '1004'  
EXCLUDE GL-ACCOUNT-ID  '030000' '830000'
```

In this example, all data for companies 1001 and 1004 would be included in the report, except for accounts 030000 and 830000.

RANGE VALUES

A range of values can be specified by enclosing properly formatted starting and ending values in parentheses ('start' 'end') with at least one space between the values.

```
SELECT GL-COMPANY-ID    ('10 ' '1099' )  
EXCLUDE GL-ACCOUNT-ID  ('030000' '099999' )
```

In this example, all data for companies 10__ through 1099 would be included, except for accounts from 030000 through 099999. For example, any company greater than or equal to 10__ and less than or equal to 1099 would be included on the report. Any account that is greater than or equal to 030000 and less than or equal to 099999 would not appear on the report.

EXERCISE: Run Statements

Can you identify all the errors with this run statement?

```
OPTION          DATE-OPTION ('MM/DD/YYYY')  
RUN             C-U-GL-DETAIL-LEDGER-DAPG67  
FROM           LIBRARY XXXXXXXXX  
INTO LIBRARY   USER41  
VARIABLE       FROM-EFFECTIVE-DATE   ;  
               '11/01/2000  
VARIABLE       THRU-EFFECTIVE-DATE  
               11/30/2000  
VARIABLE       CURRENT-YEAR-IND  
               Y  
VARIABLE       PRIOR-YEAR-CLOSED-OR-NOT  
               'Y'  
SELECT         C-GL-COMPANY-ID  
               '4001'   ;  
SELECT         C-GL-ACCOUNT-ID   ;  
* '532850' ;  
* '532860'
```

NOTES

The Check Command

The run statement must be precisely arranged and carefully punctuated in order to produce a report. The CHECK command can be used to find run statement syntax problems, the most common type of error. Any run statement in good format will pass the check. Errors in data values cannot be found by the CHECK function, nor can values that are not what the requester intended.

```
EDIT RUN STATEMENTS: C-U-GL-DETAIL-LEDGER-DAPG67-R          COLUMNS 001 072
COMMAND INPUT ==>          SCROLL ==> HALF
-----1-----2-----3-----4-----5-----6-----7--
002400 '533110' ;
002500 SELECT C-GL-CENTER-ID ;
002600 ('SXXX' )XXXXXXXXXX ;
002601 ** IEI-0001 UNEXPECTED END OF RUN STATEMENTS
***** ***** BOTTOM OF DATA *****;
```

The CHECK command is very straightforward. Typing **CHECK** on the COMMAND INPUT field and pressing **Enter** causes IE to perform the syntax check. A screen showing the progress of the checking function is shown. The edit screen reappears when check is completed. Any errors found are noted in the run statement text.

The CHECK function only evaluates each statement until it finds the first error. Be sure to rerun CHECK after finding and correcting any errors to verify your correction and to look for additional errors. IE will be unable to execute a report series if the run statement contains errors.

The CHECK function cannot evaluate a RUN member that contains an OPTION command (like the OPTION DATE-OPTION ('MM/DD/YYYY')). Any OPTION command that displays in the RUN member should be made into a comment before executing CHECK. To make the OPTION command into a comment, place an * in the first position of the line. The CHECK function will then be able to evaluate the run statement for syntax errors. Remember to remove the * before actually submitting the RUN member for execution.

After correcting an error found by CHECK, the CHECK function can be rerun to verify that no additional errors exist.

The SUBMIT Command

Once the run statement parameter values are edited, the RUN member is ready to be processed and the report generated. To process the report, type **SUBMIT** on the COMMAND INPUT line and press **Enter**. IE will respond with a screen as shown in the following illustration. The JOB "**JOBNAME**" is the identifier used by the mainframe to produce the report. This is the job name that is found on the JOB card in your RUN-JCL. The job name should be recorded for reference in case of difficulties. Press the **Enter** key to continue.

NOTES

```
D B S INFORMATION EXPERT ----- JOB SUBMISSION JSJSUB
JOB "OTCJOBH" HAS BEEN SUBMITTED
TO RUN "C-U-GL-DETAIL-LEDGER-DAPG67-R "
Press the ENTER key to continue
```

The process for requesting a report is now complete. Since changes have been made to the RUN member, you must decide whether to save the changes or cancel the changes. To save the changes, type **SAVE** on the COMMAND INPUT line. To cancel the changes, enter **CANCEL** or **CAN** on the COMMAND INPUT line. Press  to process the command. Press  to end the editing session.

 Typing **CAN** and pressing  cancels the edit session, not the report request.

WALKTHROUGH: Requesting a Report

SCENARIO

In the previous section, *Selecting an IE Report*, a report was chosen to analyze the activity in account 532850. For this scenario we will update the RUN member C-U-GL-DTL-LEDGER-DAPG67-E-RUN that resides in our agency library. Select the company assigned to you for this class. The account to select is 532850. The time period to evaluate is 11/01/1999 to 11/30/1999. Use the CHECK command to eliminate any syntax errors and then SUBMIT the request.

1. Type **SMLS** in the ACTION field and press  to select the *Source Management Directory Listing* screen.
2. Type **C-U-GL-DTL** on the FIND: line and press . Type **S** in the column to the left of the member C-U-GL-DTL-LEDGER-DAPG67-E-RUN. Press  to open the member in the SMLS editor.
3. Place an * in front of the OPTION card.
4. Find the line that reads: INTO LIBRARY XXXXXXXX ;. Type over XXXXXXXX with the library assigned to you for this class.
5. Find the lines that read:
VARIABLE FROM-EFFECTIVE-DATE;
'MM/DD/YYYY' ;
Change the 'MM/DD/YYYY' to read '**11/01/1999**'.
6. Find the lines that read:
VARIABLE THRU-EFFECTIVE-DATE ;
'MM/DD/YYYY' ;
Change the 'MM/DD/YYYY' to read '**11/30/1999**'.

NOTES

7. Press **F8** to scroll down the screen.
8. Find the lines that read:

```
VARIABLE FISCAL-YEAR ;
NNNN ;
```

 Change the NNNN line to read **2000**.
9. Find the lines that read:

```
SELECT C-GL-COMPANY-ID ;
'XXXX' ;
```

 Change the XXXX to select the company assigned in this class.
10. Find the lines that read:

```
SELECT C-GL-ACCOUNT-ID ;
'XXXXXXXXXXXXXXXXXXXX' ;
```

 Change the 'XXXXXXXXXXXXXXXXXXXX' to show '**532850**'.
11. Find the lines that read as follows:

```
SELECT C-GL-CENTER-ID
'XXXXXXXXXXXX'
```

 Place an asterisk (*) to the left of the first column of **each** line. This comments out the lines so IE will ignore them.
12. Press **Enter** to process the changes you have made to the member. Then type **CHECK** on the COMMAND INPUT line and press **Enter**. IE will execute the CHECK command and then return to the editor.
13. Notice the ERRORS ENCOUNTERED message in the upper right corner of the screen. The following illustration depicts the error message. Scroll forward by pressing the **F8** key until the error message displays.)

```

EDIT RUN STATEMENTS: C-U-GL-DTL-LEDGER-DAPG67-E-RUN          COLUMNS 001 072
COMMAND INPUT ==>                                         SCROLL ==> HALF
-----1-----2-----3-----4-----5-----6-----7--
000900*****
001000 OPTION          DATE-OPTION ('MM/DD/YYYY')
001100 RUN             C-U-GL-DTL-LEDGER-DAPG67-EOY          ;
001200 FROM           LIBRARY GLPUBLIC                      ;
001300 INTO LIBRARY   XXXXXX                                 ;
001400 VARIABLE       FROM-EFFECTIVE-DATE                   ;
001500 '11/01/1999'                                     ;
001600 VARIABLE       THRU-EFFECTIVE-DATE                   ;
001700 '11/30/1999'                                     ;
001800 VARIABLE       FISCAL YEAR                           ;
001900 2000                                                 ;
002000 SELECT         C-GL-COMPANY-ID                       ;
002100 'XX01'                                                ;
002200 SELECT         C-GL-ACCOUNT-ID                       ;
002300 '532850'                                             ;
002400 *SELECT        C-GL-CENTER-ID                       ;
002500 * 'XXXXXXXXXXXXXXXXXXXX'                             ;
002501 ** IER-0001 UNEXPECTED END OF RUN STATEMENTS
ACTION: _____ 1 Help  3 End  5 Find  6 Change  7 Pg Bwd  8 Pg Fwd
  
```

14. The error occurred because the final executable line of the run statement has a semicolon, telling IE that this statement is continued on the next line. Since there are no other lines except comment lines, IE generated the error message.

NOTES

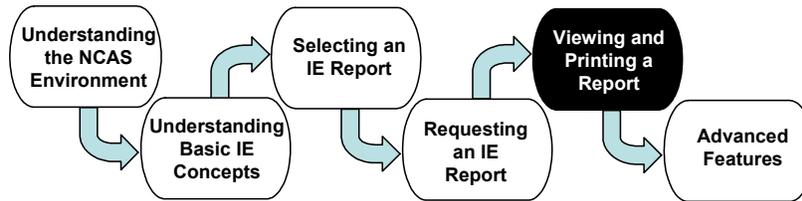
Run statements ending with semicolons or with missing semicolons are among the most common errors. Always check to make sure that the last EXECUTABLE line contains no semicolon.

15. Go to the last executable line of the run statement, the line where the account number 532850 was specified, and remove the semicolon.
16. Recheck the member to insure there are no additional errors. If there are no errors, the system displays the message NO ERRORS FOUND in the upper right corner of the screen.
17. Remove the * in front of the OPTION card. Type **SUBMIT** on the COMMAND INPUT line and press to submit the report. Press again.
18. Type **SAVE** on the COMMAND INPUT line and press . Press to end the edit session.

SUMMARY

In this section, you edited a run statement to instruct IE to produce a report to meet specific needs. The run statement was checked for syntax errors and submitted. The RUN member was saved to record the changes.

Viewing and Printing a Report



Overview

Once a report series has been submitted, it can be viewed or printed directly from Information Expert. After allowing time for Information Expert to process the request, the report can be viewed and printed using the *Report Viewing* screens. This section explains how to view the report and to use the screen features to navigate through it. This section will also describe how to print a report.

Viewing a Report

The *RVLS* screen displays a list of the Reports Series available for viewing in each library. A report series is selected for viewing by placing an **S** to the left of the series name and pressing .

```

D B S  INFORMATION EXPERT  -----  REPORT VIEWING DIRECTORY  RVLS

LIBRARY:  USERXX                NUMBER OF MEMBERS:  0002  MAXIMUM:  0225
FIND:
SERIES NAME                      TYPE                LAST UPDATE INFO  LAST VIEWED
-----
S C-U-GL-DETAIL-LEDGER-DAPG67    RPT SERIES         01/31/2001 0000XX  02/06/2001
C-U-GL-DTL-LEDGER-DAPG67-EOY    RPT SERIES         02/01/2002 0000XX  02/01/2001
****  END OF DIRECTORY  ****

Enter S to view or P to print member.  Key over library to change libraries.
ACTION:  _____  PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd
    
```

The *Report Request Directory (JSVRDI)* screen appears when a report series is selected from the *RVLS* screen. Many report series contain multiple report requests. This screen presents a list of those component reports contained in a selected report series. Individual report requests within a report series are viewed by placing an **S** to the left of the desired report.

NOTES

```

D B S INFORMATION EXPERT ----- REPORT REQUEST DIRECTORY JSVRDI

REPORT SERIES: C-U-GL-DETAIL-LEDGER-DAPG67      LIBRARY: USERXX
DATE PREPARED: 01/24/2001 09:10:37           OWNER: USERXX
DATE RUN:      01/31/2001 14:52:54           NUMBER REPORTS: 001

REPORT      WIDTH      PAGES      NOTES:
-----
GLIST      132        1          Place an S beside the report to
**END**                                         be viewed & press the ENTER key.

                                         Place a P beside the report to
                                         be printed & press the ENTER key.

ACTION: _____ PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd
    
```

Selecting a report from the report request directory opens it for viewing in the *View a Report (JSVRPS)* screen. This screen looks and functions much like the *Source Management* screen. Reports can only be viewed; they cannot be edited. The following circled areas are discussed below.

```

D B S INFORMATION EXPERT ----- VIEW A REPORT JSVRPS
SERIES C-U-GL-DETAIL-LEDGER-DAPG67 REPORT: GLIST PAGE 00001 LINE 001
COMMAND INPUT ----->----- COLUMNS 001 079
-----1-----2-----3-----4-----5-----6-----7-----
RMDSID6A STATE OF NORTH CAROLINA GENERAL LEDGE
GLIST DETAIL TRANSACTION LEDGER
6A07 COMPREHENSIVE MAJOR MEDICAL PLAN BOARD O FOR THE PERIOD 08/01/98 - 09/30

CENTER: 2100 ADMINISTRATION

EFF DATE DOCUMENT ENTY ADDITIONAL DESCRIPTIVE INFO
-----
ACC 030000 RESERVE FOR ENCUMBRANCES
08/30/98 04446 6APT VALUEBEHAVIORAL / 083098 0001
08/30/98 04446 6APT VALUEBEHAVIORAL / 083098 KW
08/30/98 12501 6APT DOA / 083098 0001
08/30/98 12501 6APT DOA / 083098 KW
08/30/98 21366 6APT CAPITOLINFORMAT / 083098 0001
08/30/98 21366 6APT CAPITOLINFORMAT / 083098 KW
08/30/98 25555 6APT BLUECROSSBLUESH / 083098 0001 1,
08/30/98 25555 6APT BLUECROSSBLUESH / 083098 KW
08/30/98 VV96237 6APT VIDEOFONICSINCR / 083098 0001
08/30/98 VV96237 6APT VIDEOFONICSINCR / 083098 KW

ACTION: _____ PF: 3 End 4 Nxt Rpt 6 Top 7 Pg Bwd 8 Pg Fwd 9 Last Pg
    
```

- The SERIES lists the series selected from the *RVLS* screen. This is the same name as the REPORT-SERIES referred to in the RUN STATEMENT.
- The REPORT indicates the name selected from the report request. Individual reports within a report series must be viewed separately and may be printed separately.
- The PAGE shows which page of the report is currently being displayed.
- The LINE indicates the first report line being displayed on the current screen.

Navigating

NOTES

The navigational features of *RVLS* are similar to those for *SMLS* and allow quick review of an IE report. Navigation is accomplished by either of two methods.

- Entries on the `COMMAND INPUT` line
- Pressing the proper function keys

The following function keys are used in IE:

Function Key	Function	Command
F1	Online Help.	HELP (?)
F3	Return to previous screen. Exits a split screen.	END
F4	Move to the Top of the next report. (Applies to Report Viewing)	NEXTRPT NR
F5	Find the occurrence of a character string.	None
F6	Move to the beginning of the current report. Repeats change.	TOP
F7	Page backward. (Scroll up)	PB
F8	Page forward. (Scroll down)	PF
F9	Move to the first line of the last page of the current report.	BOTTOM
F10	Scrolls screen to the left.	None
F11	Scrolls screen to the right.	None
F12	Return to the Primary Option menu.	None
None	Find the first occurrence of a string.	FIND F

 Not all PF keys are valid on all screens. The PF keys that are valid for the current screen are displayed across the bottom.

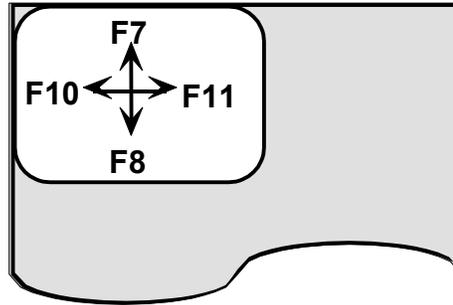
Online Help

Pressing **F1** or typing **HELP** on the command line accesses the extensive online help facility that is available for most IE screens. For example, all the commands and function keys shown previously are explained on the help screens available from any screen in the report view series.

NOTES

Screen Navigation

IE reports may be up to 259 positions wide and very long. The screen cannot show the entire width or length of most reports. Commands and function keys allow the user to shift through the report.



Pressing **F7** shifts the view backwards and **F8** shifts the view forward. Pressing **F10** shifts the view to the left and **F11** shifts the view to the right. The following illustration shows a report view.

```

D B S INFORMATION EXPERT ----- VIEW A REPORT JSVRPS
SERIES C-U-GL-DETAIL-LEDGER-DAPG67 REPORT: GLIST PAGE 0001 LINE 001
COMMAND INPUT => COLUMNS 001 079
-----1-----2-----3-----4-----5-----6-----7-----
RMDSID40 STATE OF NORTH CAROLINA GENERAL LEDGE
GLIST DETAIL TRANSACTION LEDGER
4001 COMPANY 4001 FOR THE PERIOD 11/01/00 - 11/30

CENTER: 2100

EFF DATE DOCUMENT ENTY ADDITIONAL DESCRIPTIVE INFO
-----
ACCT 532850 PRINT,BIND, DUPLICATE
11/03/2000 LONG13638-V027 B2PT LONGPRINTINGCOI / 090799 0012
11/03/2000 LONG13638-V027 B2PT LONGPRINTINGCOI / 090799 0012
11/03/2000 LONG13638-V027 B2PT LONGPRINTINGCOI / 090799 0012
11/07/2000 13638 B2PT LONGPRINTINGCOI / 110199 0022
11/07/2000 13638 B2PT LONGPRINTINGCOI / 110199 0022
11/07/2000 13638 B2PT LONGPRINTINGCOI / 110199 0022
11/21/2000 811500872 B2PT DOC / 111899 0024
11/21/2000 811500872 B2PT DOC / 111899 0024
11/21/2000 8115007021 B2PT DOC / 111899 0024
11/21/2000 8115007021 B2PT DOC / 111899 0024
ACTION: PF: 3 End 4 Nxt Rpt 6 Top 7 Pg Bwd 8 Pg Fwd 9 Last Pg
    
```

Notice on the previous screen, the COLUMNS data on the third line of the screen indicate the columns displayed. Columns 1 through 79 are displayed. Below, after pressing **F11**, columns 21 through 99 are displayed.

NOTES

```

D B S INFORMATION EXPERT ----- VIEW A REPORT JSVRPS
SERIES C-U-GL-DETAIL-LEDGER-DAPG67 REPORT: GLIST PAGE 0001 LINE 001
COMMAND INPUT => COLUMNS 021 099
-----1-----2-----3-----4-----5-----6-----7-----
STATE OF NORTH CAROLINA GENERAL LEDGER SYSTEM
DETAIL TRANSACTION LEDGER
FOR THE PERIOD 11/01/2000-11/30/2000

NT          ENTY  ADDITIONAL DESCRIPTIVE INFO          DEBIT
-----
PRINT,BIND,DUPLICATE                      *** BEGINNING
13638-V027  B2PT  LONGPRINTINGCOI / 090799 0012          .00
13638-V027  B2PT  LONGPRINTINGCOI / 090799 0012          .00
13638-V027  B2PT  LONGPRINTINGCOI / 090799 0012          .00
    13638    B2PT  LONGPRINTINGCOI / 110199 0022         149.60
    13638    B2PT  LONGPRINTINGCOI / 110199 0022          10.50
    13638    B2PT  LONGPRINTINGCOI / 110199 0022           8.98
    811500872 B2PT  DOC / 111899 0024          116.63
    811500872 B2PT  DOC / 111899 0024           7.00
    8115007021 B2PT  DOC / 111899 0024          47.78
    8115007021 B2PT  DOC / 111899 0024           2.87
ACTION: _____ PF: 3 End 4 Nxt Rpt 6 Top 7 Pg Bwd 8 Pg Fwd 9 Last Pg

```

Report Navigation

Pressing **F6** or typing **TOP** on the COMMAND INPUT line moves to the top of the current report. Pressing **F9** or typing **BOTTOM** at the COMMAND INPUT line moves to the first line of the last page of the current report.

Pressing **F4** or typing **NR** or **NEXTRPT** on the COMMAND INPUT line moves to the top of the next report.

The Find Command

To find information on the report, type **F** or **FIND** and the character string on the COMMAND INPUT line and press **Enter**. If the character string contains special or unusual characters or spaces, enclose the string in quotation marks. Press **F5** to repeat the search for the next occurrence of the same string. The columns to be searched may be specified as **Find 'A1' 15 16**. The value A1 will be searched for only in columns 15 and 16. This feature is useful when looking for particular values located in specific columns.

NOTES

Split Screen

Two separate sections of a report may be viewed by typing **SPLIT** on the COMMAND INPUT line and pressing **Enter**.

```

D B S INFORMATION EXPERT ----- VIEW A REPORT JSVRPS
SERIES C-U-GL-DETAIL-LEDGER-DAPG67 REPORT: GLIST PAGE 00001 LINE 001
COMMAND INPUT => STARTING COLS: LFT 001 RGT 039
-----1-----2-----3-----4-----5-----6-----7-----8-----9-----
RMDSID40 STATE OF NORTH CAROLINA GENERAL LE
GLIST | DETAIL TRANSACTION LEDGER
4001 COMPANY 4001 | FOR THE PERIOD 11/01/2000 - 11
CENTER: 2100 |
EFF DATE DOCUMENT ENTYI | ADDITIONAL DESCRIPTIVE INFO
-----
ACCT 532850 PRINT,BIND,DUPLICAT | E
11/03/2000 LONG13638-V027 B2PT | LONGPRINTINGCOI / 090799 0012
11/03/2000 LONG13638-V027 B2PT | LONGPRINTINGCOI / 090799 0012
11/03/2000 LONG13638-V027 B2PT | LONGPRINTINGCOI / 090799 0012
11/07/2000 13638 B2PT | LONGPRINTINGCOI / 110199 0022
11/07/2000 13638 B2PT | LONGPRINTINGCOI / 110199 0022
11/21/2000 811500872 B2PT | DOC / 111899 0024
11/21/2000 811500872 B2PT | DOC / 111899 0024
11/21/2000 8115007021 B2PT | DOC / 111899 0024
11/21/2000 8115007021 B2PT | DOC / 111899 0024
ACTION: PF: 3 End 4 Nxt Rpt 6 Top 7 Pg Bwd 8 Pg Fwd 9 Last Pg

```

Once the screen is split, the beginning columns for the left and right sides of the split can be changed by typing over the numbers at the STARTING COLS fields. The split can be removed by pressing the **F3** or by typing **END** on the COMMAND INPUT line.

Exiting

Pressing **F3** or typing **END** on the COMMAND INPUT line returns you to the previous screen. **F12** returns you to the IE *Primary Option Menu* screen.

Printing a Report

All reports within a report series may be printed by typing a **P** next to the report series name on the *RVLS* screen and pressing **Enter**. Individual reports may be printed by selecting the Report Series on the *RVLS* screen, then typing **P** next to the report request name on the *JSVRDI* screen and pressing **Enter**.

When a report series or a report request is selected for printing, IE sends the report to the printer specified in the PRINT-JCL. How to change the selected printer by editing the PRINT-JCL will be explained in the final section, *Advanced Features*.

WALKTHROUGH: Examining a Report

NOTES

SCENARIO

You wish to view the C-U-GL-DET-LEDGER-DAPG67-EOY report that was requested in the last walkthrough. This report analyzed the expenditures for account 532850 for fiscal year 2000.

1. Type **RVLS** in the ACTION field and press **Enter**.

```
D B S INFORMATION EXPERT ----- REPORT VIEWING DIRECTORY RVLS
LIBRARY: USERXX                      NUMBER OF MEMBERS: 0002  MAXIMUM: 0225
FIND:
SERIES  NAME                          TYPE          LAST UPDATE INFO  LAST VIEWED
-----
C-U-GL-DETAIL-LEDGER-DAPG67          RPT SERIES    01-31-2001 0000XX  02-06-2001
2 C-U-GL-DTL-LEDGER-DAPG67-EOY       RPT SERIES    02-01-2001 0000XX  02-01-2001
**** END OF DIRECTORY ****

Enter S to view or P to print member.  Key over library to change libraries.
ACTION: _____ PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd
```

2. Type **S** before the report series C-U-GL-DTL-LEDGER-DAPG67-EOY and press **Enter**.

```
D B S INFORMATION EXPERT ----- REPORT REQUEST DIRECTORY JSVRDI
REPORT SERIES: C-U-GL-DTL-LEDGER-DAPG67-EOY      LIBRARY:  USERXX
DATE PREPARED: 01-31-2001 15:29:31              OWNER:    0000XX
DATE RUN:      01-31-2001 15:29:31              NUMBER REPORTS: 001

REPORT   WIDTH  PAGES      NOTES:
-----
3 GLIST   132    1          Place an S beside the report to
**END**                                     be viewed & press the ENTER key.

                                           Place a P beside the report to
                                           be printed & press the ENTER key.

ACTION: _____ PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd
```

3. Type **S** before the report GLIST and press **Enter**.

NOTES

```

D B S INFORMATION EXPERT ----- VIEW A REPORT JSVRPS
SERIES C-U-GL-DTL-LEDGER-DAPG67-EOY REPORT: GLIST PAGE 00001 LINE 001
COMMAND INPUT => COLUMNS 001 079
-----1-----2-----3-----4-----5-----6-----7--
RMDSID41 STATE OF NORTH CAROLINA GENERAL LEDGE
GLIST DETAIL TRANSACTION LEDGER
4101 COMPANY 4101 FOR THE PERIOD 11/01/00 - 11/30-

CENTER: 2100

 EFF DATE DOCUMENT ENTY ADDITIONAL DESCRIPTIVE INFO AUDIT ID
-----
ACCT 532850 PRINT,BIND, DUPLICATE
11/04/1999 LONG13638-V027 B2PT LONGPRINTINGCOI / 090799 0012 *OKE000004
11/04/1999 LONG13638-V027 B2PT LONGPRINTINGCOI / 090799 0012 *OKE000004
11/04/1999 LONG13638-V027 B2PT LONGPRINTINGCOI / 090799 0012 *OKE000004
11/08/1999 13638 B2PT LONGPRINTINGCOI / 110199 0022 *OKI000016
11/08/1999 13638 B2PT LONGPRINTINGCOI / 110199 0022 *OKI000016
11/08/1999 13638 B2PT LONGPRINTINGCOI / 110199 0022 *OKI000016
11/22/1999 811500872 B2PT DOC / 111899 0024 *OKV000082
11/22/1999 811500872 B2PT DOC / 111899 0024 *OKV000082
11/22/1999 8115007021 B2PT DOC / 111899 0024 *OKV000082
11/22/1999 8115007021 B2PT DOC / 111899 0024 *OKV000082
ACTION: PF: 3 End 4 Nxt Rpt 6 Top 7 Pg Bwd 8 Pg Fwd 9 Last Pg
    
```

4. The expenditures for account 532850 are displayed.

```

D B S INFORMATION EXPERT ----- VIEW A REPORT JSVRPS
SERIES C-U-GL-DTL-LEDGER-DAPG67-EOY REPORT: GLIST PAGE 00001 LINE 001
COMMAND INPUT => 6 COLUMNS 001 079
-----1-----2-----3-----4-----5-----6-----7--
RMDSID41 STATE OF NORTH CAROLINA GENERAL LEDGE
GLIST DETAIL TRANSACTION LEDGER
4101 COMPANY 4101 FOR THE PERIOD 11/01/00 - 11/30-

CENTER: 2100

 EFF DATE DOCUMENT ENTY ADDITIONAL DESCRIPTIVE INFO AUDIT ID
-----
ACCT 532850 PRINT,BIND, DUPLICATE
11/04/1999 LONG13638-V027 B2PT LONGPRINTINGCOI / 090799 0012 *OKE000004
11/04/1999 LONG13638-V027 B2PT LONGPRINTINGCOI / 090799 0012 *OKE000004
11/04/1999 LONG13638-V027 B2PT LONGPRINTINGCOI / 090799 0012 *OKE000004
11/08/1999 13638 B2PT LONGPRINTINGCOI / 110199 0022 *OKI000016
11/08/1999 13638 B2PT LONGPRINTINGCOI / 110199 0022 *OKI000016
11/08/1999 13638 B2PT LONGPRINTINGCOI / 110199 0022 *OKI000016
11/22/1999 811500872 B2PT DOC / 111899 0024 *OKV000082
11/22/1999 811500872 B2PT DOC / 111899 0024 *OKV000082
11/22/1999 8115007021 B2PT DOC / 111899 0024 *OKV000082
11/22/1999 8115007021 B2PT DOC / 111899 0024 *OKV000082
ACTION: PF: 3 End 4 Nxt Rpt 6 Top 7 Pg Bwd 8 Pg Fwd 9 Last Pg
    
```

5. Move down the report by pressing **[F8]**. Move up the report by pressing **[F7]**. Press **[F11]** to move the report to the right. Press **[F10]** to move the report to the left.

6. Type **SPLIT** on the COMMAND INPUT line and press **[Enter]**.

NOTES

```

D B S INFORMATION EXPERT ----- VIEW A REPORT JSVRSF
SERIES: C-U-GL-DTL-LEDGER-DAPG67-EOY REPORT: GLIST PAGE 00001 LINE 001

COMMAND INPUT ==>
-----1-----2-----3-----4-----5-----6-----7-----+
RMDSID41 | STATE OF NORTH CAROLINA GENERAL LE
GLIST | DETAIL TRANSACTION LEDGE
4101 COMPANY 4101 | FOR THE PERIOD 11/01/1999 -

CENTER: 2100

EFF DATE DOCUMENT ENTY AD DITIONAL DESCRIPTIVE INFO AUDIT ID
-----
ACCT 532850 PRINT,BIND,DUPLICAT | E
11/04/1999 LONG13638-V027 B2PT LO | NGPRINTINGCOI / 090799 0012 *OKE00000
11/04/1999 LONG13638-V027 B2PT LO | NGPRINTINGCOI / 090799 0012 *OKE00000
11/04/1999 LONG13638-V027 B2PT LO | NGPRINTINGCOI / 090799 0012 *OKE00000
11/08/1999 13638 B2PT LO | NGPRINTINGCOI / 110199 0022 *OKI00001
11/08/1999 13638 B2PT LO | NGPRINTINGCOI / 110199 0022 *OKI00001
11/08/1999 13638 B2PT LO | NGPRINTINGCOI / 110199 0022 *OKI00001
11/22/1999 811500872 B2PT DO | C / 111899 0024 *OKV00008
11/22/1999 811500872 B2PT DO | C / 111899 0024 *OKV00008
11/22/1999 8115007021 B2PT DO | C / 111899 0024 *OKV00008
11/22/1999 8115007021 B2PT DO | C / 111899 0024 *OKV00008
ACTION: _____ PF 3 End 4 Nxt Rpt 6 Top 7 Pg Bwd 8 Pg Fwd 9 Bottom
    
```

7. Move the cursor to the STARTING COL: area and type **001** for the starting column of the left side. Type **080** for the starting column for the right side. Try other starting columns for the right and left sides.
8. Press the **F3** key to terminate the split screen. Press **F3** to exit the report. Press **F3** to return to the Report Viewing Directory screen.

Troubleshooting

IE produces reports on the mainframe computer in a batch process. Sufficient time to execute the report must be given before attempting to view the report results. If you attempt to access the report while it is being added, you may see the informative message displayed below. Wait, then try to access the report again.

```

D B S INFORMATION EXPERT ----- REPORT VIEWING DIRECTORY RVLS
REPORT/PRINT SERIES BEING ADDED - TRY AGAIN LATER
LIBRARY: USER41 ----- NUMBER OF MEMBERS: 0002 MAXIMUM: 0225
FIND: _____
SERIES NAME TYPE LAST UPDATE INFO LAST VIEWED
-----
C-U-GL-DETAIL-LEDGER-DAPG67 RPT SERIES 01/31/2001 000041 01/31/2001
S C-U-GL-DTL-LEDGER-DAPG67-EOY RPT SERIES 02/01/2001 000041 02/01/2001
**** END OF DIRECTORY ****

Enter S to view or P to print member. Key over library to change libraries.
ACTION: _____ PF1 Help PF3 End PF6 Top PF7 Pg Bwd PF8 Pg Fwd
    
```

NOTES

```
D B S  INFORMATION EXPERT  -----  REPORT REQUEST DIRECTORY  JSVRDI

REPORT SERIES:  C-U-GL-DTL-LEDGER-DAPG67-EOY      LIBRARY:  USERXX
DATE PREPARED:  01-31-2001  15:29:31              OWNER:    0000XX
DATE RUN:       01-31-2001  15:29:31              NUMBER REPORTS: 001

REPORT      WIDTH      PAGES      NOTES:
-----
JWSLOG      80          1          Place an S beside the report to
**END**                                           be viewed & press the ENTER key.

                                           Place a P beside the report to
                                           be printed & press the ENTER key.

ACTION: _____  PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd
```

There may be occasions that, after selecting a report series from the Report Viewing Directory, you find the only report request is JWSLOG. This is the run log that is placed in the directory when no data has been extracted. This usually is caused by incorrect selection criteria – or that no records meet the criteria specified in the run statement. Review the dates specified, the selection and exclusion criteria and the variable input.

If you have an error in your run statement, or for some reason Information Expert cannot execute the report series, nothing will appear in the Report Viewing Directory. If you feel you have waited a sufficient length of time for the report to execute and there are no results, contact the OSC Support Services Center.

If you get the message REPORT/PRINTSERIES INCOMPLETE, some problem has caused the output not to be written to the Report Viewing File. Call the OSC Support Services Center at (919) 875-4357 if you need assistance.

If you get the message REPORT/PRINT SERIES BEING ADDED - TRY AGAIN LATER, the system has not finished processing your job. Wait a few minutes and try again.

Advanced Features



Overview

This final section will round out your understanding of IE in the NCAS environment. This section will cover maintenance of library members in source management and report viewing. We will also discuss revising our JCL to allow reports to print at different locations. Finally we will review using public run statements and ending the IE session.

Managing Source Members

The *Source Management Utility (SMUT)* screen provides a list of available source management functions and provides fields from which member names can be processed. We have used the Utility screen to copy a RUN member to an agency library. *SMUT* can also be used to maintain the agency library by deleting members no longer needed.

Deleting Source Members

From the *SMUT* screen, press **Enter** again to see a list of source management members contained within the library. This is the same list as is seen from the *SMLS* screen.

```

D B S  INFORMATION EXPERT  -----  SOURCE MANAGEMENT UTILITIES  JSMLDU
LIBRARY: FINANXX          NUMBER OF MEMBERS: 0079  MAXIMUM: 0225
  FIND: _____
MEMBER NAME              RENAME/COPY TO          COPY TO
-----              -----              -----
A-16-FORESTRY-FIX
A-16-FORESTRY-FIX-RUN
A-16-POMC-ACCOUNTS
AA-ANALYSIS
AA-POSTUNDO
AA-POSTUNDO-RUN
ALL-ACCOUNT-LIST
AOA-HOUSEING-FINANCE-FSI
AOA-HOUSEING-FINANCE-FSI-HOLD
D AXK-AP-PROJECT-LIST          ** DELETED **
A02-AP-PROJECT-LIST-RUN
A16-AA-ACCOUNT-LIST
A16-AA-ACCOUNT-LIST-RUN
A16-POC-FSI-JOURNAL
A16BPSFIX
ACTION: _____  PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd
  
```

NOTES

To delete a source member from the agency library, type a **D** in the first column to the left of the member name and press **Enter**. The message **** DELETED **** will display to the right of the member name.

Managing Report Views

The *Report Viewing Utility (RVUT)* screen provides a directory of the report views contained within each library. This is the same list that appears on the *RVLS* screen.

Deleting Report Views

The *RVUT* screen is used to delete report views.

```
D B S  INFORMATION EXPERT - REMOVE SERIES FROM REPORT VIEWING FILE RVUT
LIBRARY: FINANXX                NUMBER OF MEMBERS: 0006  MAXIMUM: 0225
FIND:
SERIES NAME                      TYPE                      ACTION TAKEN
-----
D A-16-FORESTRY-FIX              RPT SERIES              SERIES DELETED
AOA-HOUSING-FINANCE-FSI      RPT SERIES
A16BPSFIX                       RPT SERIES
A16PBSLST                       RPT SERIES
C-U-FC-FSI-VALIDATION           RPT SERIES
FEDERAL-FUND-BALANCES           RPT SERIES
****  END OF DIRECTORY  ****

ACTION: _____  PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd
```

To delete a report view from the agency library, type **D** in the first column to the left of the report name and press **Enter**. The message **SERIES DELETED** displays under the **ACTION TAKEN** field. You are only deleting the report viewing (RVLS) member, not the program that created it (SMLS member) or the run member. The capacity of RVLS is based on the size of the report, as well as a 225-member limit. Since RVLS is a statewide file, it tends to fill up quickly. Delete any member you have already viewed and/or printed.

Always delete reports that are no longer needed. Failure to do so may cause your reports to ABEND (an abnormal stop to the current system process) due to lack of space.

Print-JCL

PRINT-JCL is a source member in the agency libraries used when printing a report from Report Viewing. It can be updated to print your reports at different printer locations.

Selecting a Printer

NOTES

The printer to which IE sends completed reports is determined in the PRINT-JCL, which can be edited to change printers.

```

D B S  INFORMATION EXPERT  ----- SOURCE MANAGEMENT DIRECTORY LISTING  SMLS
LIBRARY: FINANXX                NUMBER OF MEMBERS: 0080  MAXIMUM: 0225
FIND: _____

MEMBER NAME                      TYPE                      NOTES:
-----
A-16-FORESTRY-FIX                RPT SERIES              Enter an S next to the
A-16-FORESTRY-FIX-RUN            RUN STATEMTS            member to be edited.
A-16-POMC-ACCOUNTS              RPT SERIES
AA-ANALYSIS                      RPT SERIES              To change libraries,
AA-POSTUNDO                     RPT SERIES              enter the name of the
AA-POSTUNDO-RUN                 RUN STATEMTS            new library & press
ALL-ACCOUNT-LIST                RPT SERIES              the ENTER key.
AOA-HOUSEING-FINANCE-FSI        RPT SERIES
AOA-HOUSEING-FINANCE-FSI-HOLD   RPT SERIES
AXX-AP-PROJECT-LIST            RPT SERIES
A10-AP-SUM-CKS-FOR-JULY-RUN     RUN STATEMTS
A16-AA-ACCOUNT-LIST            RPT SERIES
A16-AA-ACCOUNT-LIST-RUN        RUN STATEMTS
A16-POC-FSI-JOURNAL            RPT SERIES
A16BPSFIX                      RPT SERIES

ACTION: _____  PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd

```

The PRINT-JCL can be found by using the FIND field on the SMLS directory listing. Type **PRINT** in the FIND field and press **Enter**. The directory listing moves the first member beginning with these letters to the top of the listing.

```

D B S  INFORMATION EXPERT  ----- SOURCE MANAGEMENT DIRECTORY LISTING  SMLS
LIBRARY: FINANXX                NUMBER OF MEMBERS: 0080  MAXIMUM: 0225
FIND: _____

MEMBER NAME                      TYPE                      NOTES:
-----
* PRINT-JCL                      MISC TEXT              Enter an S next to the
PRINT-JCL-DIB-FIX-RUN           MISC TEXT              member to be edited.
PRINT-JCL-DOWNLOAD             MISC TEXT
PRINT-JCL-HOUSEING-FINANCE     MISC TEXT              To change libraries,
PRINT-JCL-LISTINGS             MISC TEXT              enter the name of the
PRINT-JCL-MAY97                MISC TEXT              new library & press
PRINT-JCL-NEW-FORMAT           MISC TEXT              the ENTER key.
PRINT-JCL-OSC                  MISC TEXTS
PRINT-JCL-REPORTS             MISC TEXT
RECEIPTBASIS                  RPT SERIES
RUN-JCL                        MISC TEXT
RUN-JCL-AUG                    MISC TEXT
RUN-JCL-HF-PRINT               MISC TEXT
RUN-JCL-HOLD                   MISC TEXT
RUN-JCL-N-REGION              MISC TEXT

ACTION: _____  PF1 Help  PF3 End  PF6 Top  PF7 Pg Bwd  PF8 Pg Fwd

```

To select or change a printer, type **S** to the left of the PRINT-JCL member and press **Enter**.

NOTES

```

EDIT MISC TEXT: PRINT-JCL                                COLUMNS 001 072
COMMAND INPUT ==>                                       SCROLL ==> HALF
-----1-----2-----3-----4-----5-----6-----7--
001000 //SYSOUT DD SYSOUT=(*)
001100 /**
001200 /**
001300 /**USE JWSRPT DESTINATIONS WHEN PRINTING A REPORT SERIES FROM RVLS
001400 /**
001410 /**JWSRPT DD SYSOUT=A,DEST=APTR35, <---- 80 COL LASER
001510 /**JWSRPT DD SYSOUT=A,DEST=APTR35A, <---- 132 COL LASER
001511 /**JWSRPT DD SYSOUT=A,DEST=APTR35B, <---- 160 COL LASER
001520 /**JWSRPT DD DSN=OSC.AFR.IZZO,TEXT, <---- TSO DATA SET -
001600 /**JWSRPT DD SYSOUT=A,DEST=APTR33, <---- LINE PRINTER -
001700 /**JWSRPT DD SYSOUT=A,DEST=APTR38, <---- LINE PRINTER -
001710 /**JWSRPT DD SYSOUT=A,DEST=APTR38A, <---- LINE PRINTER
001720 /**JWSRPT DD SYSOUT=A,DEST=APTR38B, <---- LINE PRINTER -
001730 /**JWSRPT DD SYSOUT=I, <---- LASER PRINTER-SIPS
001800 /**JWSRPT DD SYSOUT=J, <---- LASER PRINTER-SIPS
001900 /**JWSRPT DD SYSOUT=(*), <---- PRINT TO HOLD QUEUE
002000 // DCB=(RECFM=VBA,LRECL=260,BLKSIZE=22364),
002100 // COPIES=1 <---- CHANGE IF GT 1 COPY

ACTION: _____ 1 Help 3 End 5 Find 6 Change 7 Pg Bwd 8 Pg Fwd

```

The text of the PRINT-JCL appears in the *SMLS* screen editor. Examine the previous illustration. Each of the lines that begins with */**JWSRPT* represents an available printer. Only one printer may be specified. The asterisk turns the lines into comments. These lines are ignored. The line that begins *//JWSRPT* (with no asterisk) is the printer that is currently selected for use.

 The above PRINT-JCL is just an example. You may have to change your PRINT-JCL to reflect printers available to your agency. Change the *DEST=* XXXXXXXX to reflect the available printers. The *DEST=* option is what directs the report to a specific printer.

```

EDIT MISC TEXT: PRINT-JCL                                COLUMNS 001 072
COMMAND INPUT ==> SAVE                                  SCROLL ==> HALF
-----1-----2-----3-----4-----5-----6-----7--
001000 //SYSOUT DD SYSOUT=(*)
001100 /**
001200 /**
001300 /**USE JWSRPT DESTINATIONS WHEN PRINTING A REPORT SERIES FROM RVLS
001400 /**
001410 /**JWSRPT DD SYSOUT=A,DEST=APTR35, <---- 80 COL LASER
001510 /**JWSRPT DD SYSOUT=A,DEST=APTR35A, <---- 132 COL LASER
001511 /**JWSRPT DD SYSOUT=A,DEST=APTR35B, <---- 160 COL LASER
001520 /**JWSRPT DD DSN=OSC.AFR.IZZO,TEXT, <---- TSO DATA SET -
001600 /**JWSRPT DD SYSOUT=A,DEST=APTR33, <---- LINE PRINTER -
001700 /**JWSRPT DD SYSOUT=A,DEST=APTR38, <---- LINE PRINTER -
001710 /**JWSRPT DD SYSOUT=A,DEST=APTR38A, <---- LINE PRINTER 132C
001720 /**JWSRPT DD SYSOUT=A,DEST=APTR38B, <---- LINE PRINTER - 160C
001730 /**JWSRPT DD SYSOUT=I, <---- LASER PRINTER-SIPS
001800 /**JWSRPT DD SYSOUT=(*), <---- PRINT TO HOLD QUEUE
001900 // CHARS=GT15, <---- NECESSARY FOR COMP PRT
002000 // DCB=(RECFM=VBA,LRECL=260,BLKSIZE=22364),
002100 // COPIES=1 <---- CHANGE IF GT 1 COPY

ACTION: _____ 1 Help 3 End 5 Find 6 Change 7 Pg Bwd 8 Pg Fwd

```

To change printers, insert an asterisk (*) in the currently selected printer line and delete the asterisk (*) from the line representing the printer you wish to use. When the changes are complete, enter **SAVE** in the COMMAND INPUT line.

NOTES

Large Reports

There are times when a report is too large to put into the Report Viewing file. When this occurs, there are a few options. First, see if you can limit the run criteria so the report would be smaller. Check from dates and to dates. Also check the agency criteria (entity, company, level1, etc.). Second, run the report and have it go into TSO. Once in TSO, you can view the report using SDSF. (For information about TSO and SDSF, contact your technical personnel). Third, run the report and direct it to a printer instead of the report viewing file.

To have the report go to TSO or print directly, use one of the following two methods. These methods must be performed before the report series is submitted. The first method is to change the User Options for the library. This method is not recommended because it will effect all users running reports in the library. For more information about this method, contact the OSC Support Services Center at (919) 875-4357.

The second method is to use an OPTION card. An option can be added to the OPTION control card in the RUN member to redirect the output from the report execution from report viewing to print.

The **NOVIEW** option tells IE to direct the output from this execution to TSO instead of Report Viewing. Below are examples of this option if the RUN member already has an OPTION control card:

```
OPTION DATE-OPTION ('MM/DD/YYYY') NOVIEW  
OPTION LIBRARY (DHRPUB) NOVIEW
```

If you want the report to go to Report Viewing, remove the **NOVIEW** option, or change it to **VIEW**.

If an OPTION control card does not currently exist in the RUN member, add the OPTION control card below as the first line in the RUN member, before the RUN statement.

```
OPTION NOVIEW
```

If you want the report to go to Report Viewing, remove the OPTION **NOVIEW** control card (or insert an * as the first character), or change **NOVIEW** to **VIEW**.

NOTES

RUN-JCL

Once the VIEW REPORTS option has been turned off, or the OPTION NOVIEWS control card was added to the run member, reports will be disposed of based on the destination declared in the RUN-JCL member. This member may need to be updated before submitting the report to run.

A new JCL statement may need to be added to your JCL. As we saw with the PRINT-JCL member, we have the option to change the printer destination. If the following two lines are not included in your RUN-JCL, you will need to add them.

```
//JWSRPT DD SYSOUT=A,DEST=XXXXXXXX,CHARS=GT15,  
//          DCB=(RECFM=VBA,LRECL=260,BLKSIZE=22364)
```

The next screen displays the location in the RUN-JCL where these two lines should be placed.

```

EDIT MISC TEXT: PRINT-JCL                                COLUMNS 001 072
COMMAND INPUT ==>                                       SCROLL ==> HALF
-----+-----1-----+-----2-----+-----3-----+-----4-----+-----5-----+-----6-----+-----7--
***** ***** TOP OF DATA *****
000100 //FAAIEPRT JOB (OSCFAAIE,B65,'ie run'), a.toong 981-5459',
000200 //          CLASS=H,MSGCLASS=2,REGION=2048K,NOTIFY=TS65C13,NOLIMIT
000300 //*
000400 //PROCLIB  DD DSN=OSC.FAA.IE9601.PROCLIB,DISP=SHR
000500 //*
000600 //EXECIE   EXEC ERJCEXEC
000700 .M
000800 //*
000820 //JWSRPT   DD SYSOUT=A.DEST=ATAP34B,CHARS=GT15,
000830 //          DCB=(RECFM=VBA,LRECL=260,BLKSIZE=22364)
000900 //*****
001000 //* THIS JCL WAS LAST UPDATED 02-03-98
024900 //*****
025000 //*   GL DD STATEMENTS
025100 //*****
025700 //*
029400 //GLFMBUD  DD DSN=OSC.OPC.VSAM.GL.GLFMBUD,

ACTION: _____ 1 Help  3 End  5 Find  6 Change  7 Pg Bwd  8 Pg Fwd

```

As we learned with PRINT-JCL, the DEST= instructs the report to be directed to a specific printer. Change the DEST= to the desired agency printer. Now when you submit a Report Series to run, the reports will be printed directly to the printer specified on the DEST= option.

To have the report printed at ITS, remove the DEST= option. The JCL would look like this:

```
//JWSRPT DD SYSOUT=A,CHARS=GT15,  
DCB=(RECFM=VBA,LRECL=260,BLKSIZE=22364)
```

 If you are unsure of these changes, contact the OSC Support Services Center for assistance.

Using Public Run Members

NOTES

Run members found in public libraries can be modified and submitted from the public library. The same procedures you have learned for editing, checking and submitting remain the same. One major difference is that the RUN member cannot be saved in the public library. You must CANCEL from the public RUN member.

To access a public RUN member, type **SMLS** in the ACTION field. Change the library to the public library where the RUN member is stored. Select the RUN member. Make the necessary changes. Issue the CHECK command to find any errors. If no errors exist, SUBMIT the member. To exit from the RUN member, you must CANCEL.

Signing Off IE and the Mainframe

There are two steps to the process of exiting from IE: sign off from IE and LOGOFF from CICS. These final steps are very important. If they are not executed properly, it may be impossible to return to IE until your operator id is cancelled. If this happens, contact the OSC Support Services Center to have your operator id cancelled. As a precaution against unauthorized system use, always log off whenever you leave your work area.

Walkthrough: Logging Off

SCENARIO

It is time for you to go to lunch and you must sign off from IE and logoff from CICS.

Signing Off IE

1. Press **Tab** to the ACTION field on any screen. Type **SO** or **LOGOFF**.
2. Press **Enter**.

```
EXPERT SYSTEMS LOGOFF IS COMPLETE.
```

Logging Off the Mainframe

1. Clear the screen by pressing **Pause**. (optional)
2. Type **LOGOFF**.
3. Press **Enter**.

NOTES

```
149.168.91.180 VIA TCP/IP TO THE NORTH CAROLINA STATE NETWORK --  
  
-- CUSTOMER SUPPORT CENTER: (919) 981-5197 / 1-800-722-3946 --  
  
* UNAUTHORIZED OR PERSONAL USE OF COMPUTER INFORMATION AND/OR EQUIPMENT *  
* IS A VIOLATION OF STATE AND FEDERAL LAWS. *  
  
APPLICATION:
```