The CU*BASE GOLD Report Builder

Revised: 6/3/2024

The CU*BASE Report Builder is a powerful, flexible tool for creating custom inquiries and reports that can be viewed, printed, or even saved as a database file ready for downloading. The CU*BASE Report Builder uses IBM Query as its engine, allowing you to manipulate data from any of your CU*BASE member files, using any layout, calculation, and formatting parameters you wish.

In addition to custom reports and inquiries, the CU*BASE Report Builder menu also provides many pre-written inquiries designed to give you access to data from the most commonly used CU*BASE files.

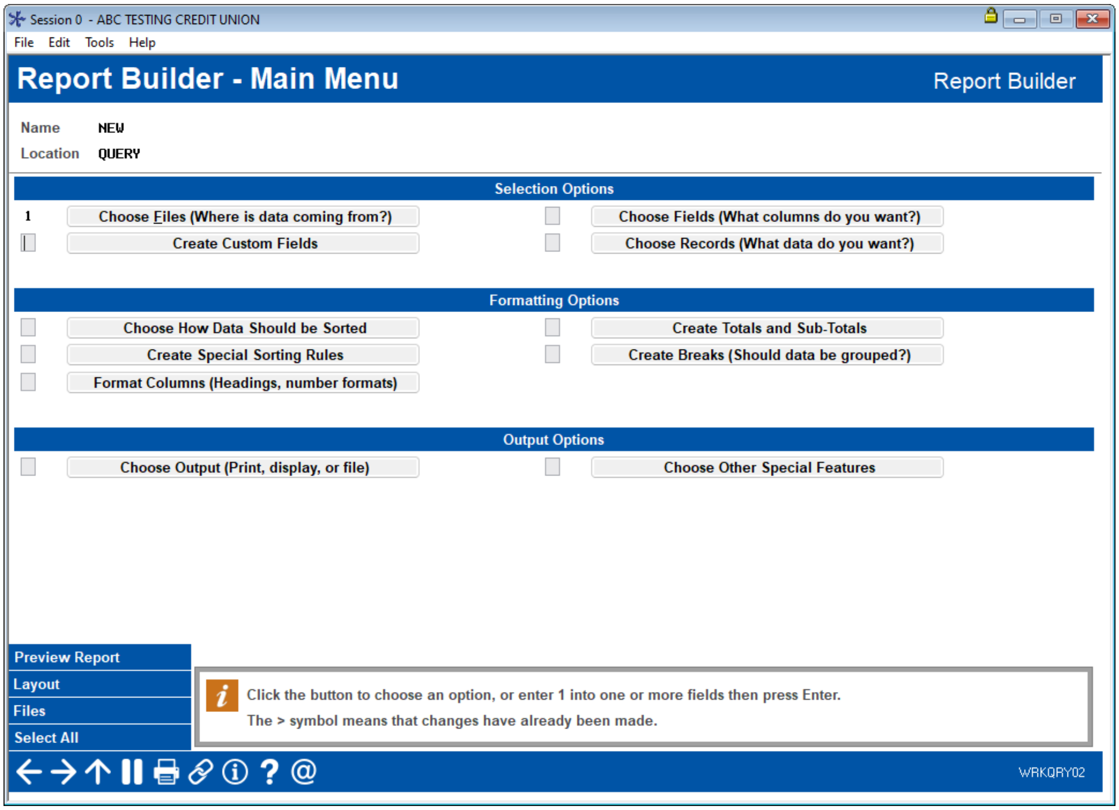
Report? Inquiry? Database File? Yes!

The terms "report", "inquiry", and "database file" are used interchangeably here because the same custom report can be set up to output three different ways:

1. As a printed report.
2. Displayed on the screen as a custom online inquiry.
3. Saved as a new database file, ready for use in other custom reports or for downloading to a PC.

All methods use the exact same parameters for formatting and content; the only difference is what output format generates when you run the report! This means you can create a custom report for viewing on the screen, periodically print it out as a paper report, and occasionally place the data into a database file and download it to your favorite spreadsheet program, all using the same configuration.

The Report Builder Main Menu



This screen is Report Builder "command central" and contains access to all the options available for setting up your report or inquiry. You can choose one option at a time or select multiple options for quick access to just the features you need.

As you can see, the options are separated into categories, to make it easy for new users to find the settings they need to create their first custom report or inquiry.

Selection Options

The first section contains options that let you choose which data will appear on the report. With these features you can:

- Choose one or more CU*BASE files that contain the data you need. (*You can even use a custom database file you created yourself through Report Builder*.)
- Create custom fields by performing a "calculation" on other fields—this could be a mathematical calculation (*FieldA plus FieldB*) or simply a manipulation of data within a field (*extracting the "year" portion of a date*).
- Choose and organize which fields should appear as columns on the report.
- Set up selection criteria to control which records will be included (*such as all members born after a certain year, accounts with a balance greater than $X, loans with payments due during the month of July, etc*).

Formatting Options

The middle section lets you format what the data will look like on the final report/inquiry. Using these options, you can:

- Choose how the report will be sorted, using as many fields as needed to get the exact order you want. (*You can even create special rules to put numbers before letters, blanks at the beginning or end, etc*.)
- Customize column headings and column widths or change the way data is displayed, such as formatting currency symbols, commas, dashes, special characters, the appearance of dates, etc.
- Summarize data in the report by choosing which columns should show a total, average, minimum value, maximum value, and/or record count.
- Break records into groups of similar data with optional sub-totals or other summary functions after each group.

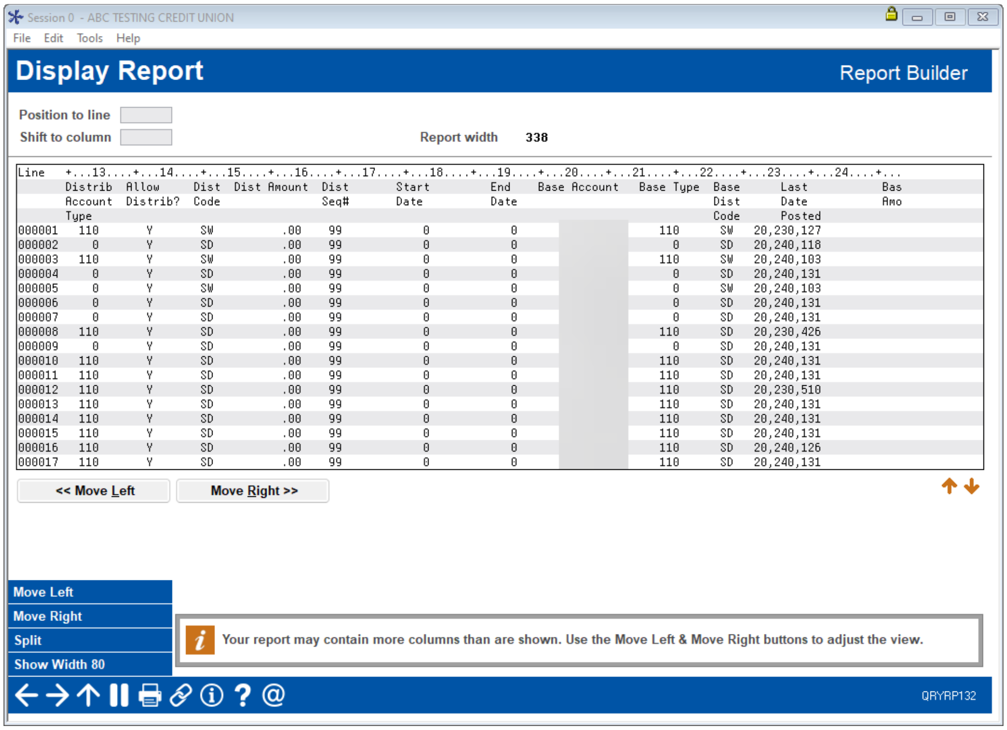
Output Options

The final section contains options to control what will be produced when the custom report is run:

- Choose whether the report data will be printed, displayed on the screen as an inquiry, or saved as a separate database file. (*If printing, additional options such as report and page headings can be defined as well*.)
- Specify if calculation results should be rounded and how you wish error messages to be handled.

Data on Display

This is a sample of the screen used to display your custom inquiry. For extra-wide inquiries, simple tools let you move around easily or “lock” one side of the screen while you scroll across on the other.

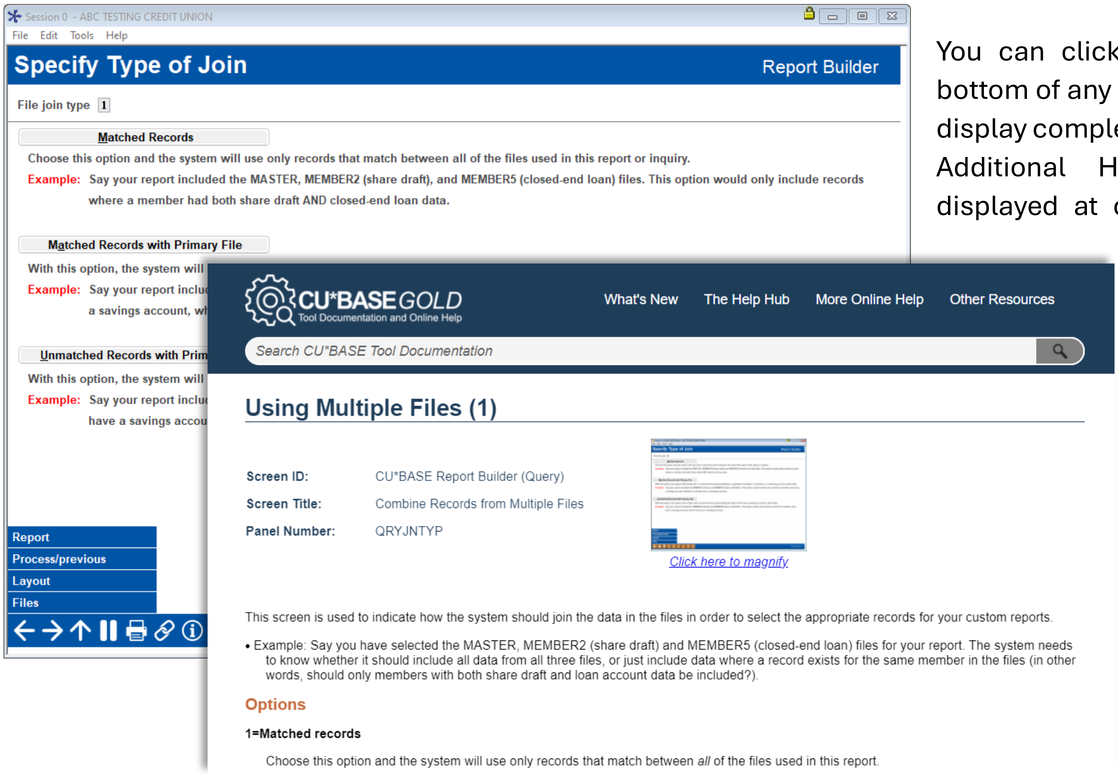


At any time while you are building your custom report, you can click the Preview Report button to instantly take a look at your report on the screen. This is great for checking column headings and formatting, and it makes it easier to adjust as you go along!

Preview Report

Help at Your Fingertips

Whether you are just getting started or you create custom inquiries every day, the Report Builder is designed to be easy to learn and simple to use. Help is always just a click away.

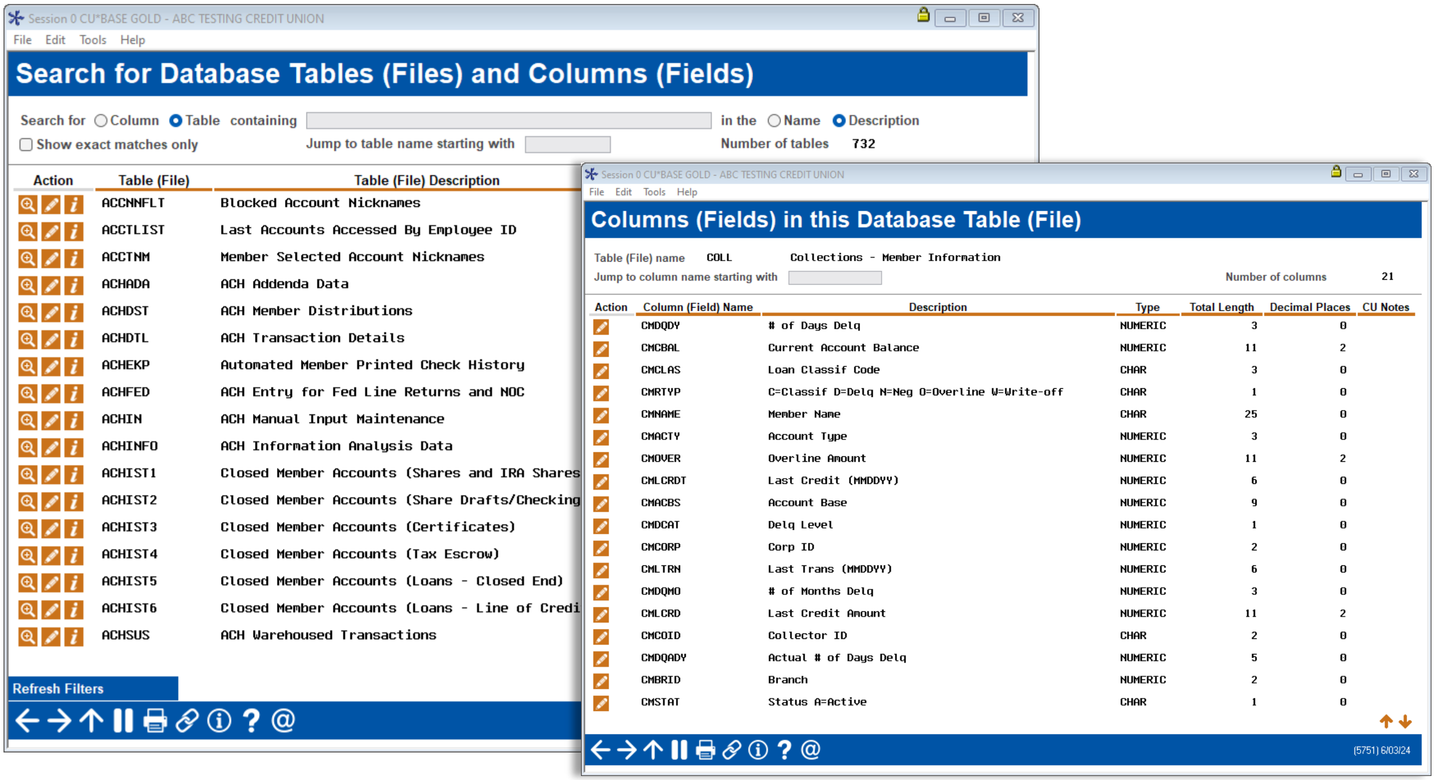


You can click the ⓘ button at the bottom of any CU*BASE GOLD screen to display complete online help at any time. Additional Help buttons are also displayed at critical points where you might need to look up a commonly used file name or other setting. And wherever possible, we even include helpful tips right on the screen.

With the available help resources, *anyone* can become a Report Builder expert in no time!

CU*ANSWERS
A Credit Union Service Organization

The Perfect Companion: Database Search Assistant



As a compliment to the Report Builder tool, CU*BASE also provides a separate search tool that helps you locate data stored in any of your member files. This tool, **Tool #332 *Database Search Assistant*,** makes your job of mining and reporting on your CU*BASE member data files even easier.

Quickly search a list of CU*BASE files, search files for their field names, or even look for a field by any word in its description!

Learning the Lingo: A Dictionary of Terms

The IBM **Query** program is the "engine" used by Report Builder to perform inquiries on data stored in a database. Query is a powerful tool that lets you organize, display, and print data in a variety of ways. CU*BASE also has many "canned" Queries already set up, so you can view commonly inquired data.

A **File** is a type of "storage container" for data, similar to a manila file folder that contains paper files. Groups of many different files are stored within a Library. CU*BASE uses many different files to store member, transaction, and accounting records. For example, one file holds member name and address information, while another stores loan account information.

A **Library** (referred to as "Location" on most Report Builder screens) is a storage location for files, similar to a file cabinet. A library can also store custom reports that you create and save. CU*BASE security ensures that a credit union is only able to access its own libraries and files.

A **Record** is a complete group of data in a file. For example, in the MASTER file, which contains membership information, all the information about a specific membership account comprises a record. Records contain many fields, such as name, address, date opened, etc.

A **Field** is an individual piece of data within a record. For example, the MASTER file, which contains membership information, contains a field for first name, a field for last name, one for city, one for work phone, etc.