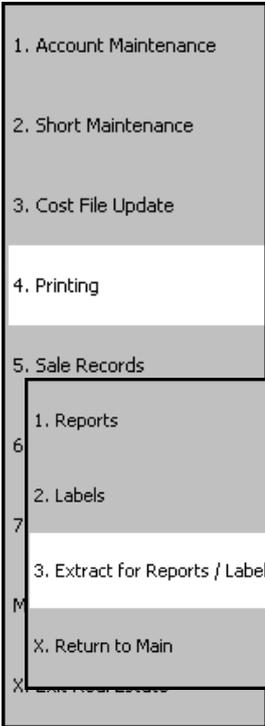




A Division of Harris Computer Systems

## REAL ESTATE: EXTRACT REPORTS

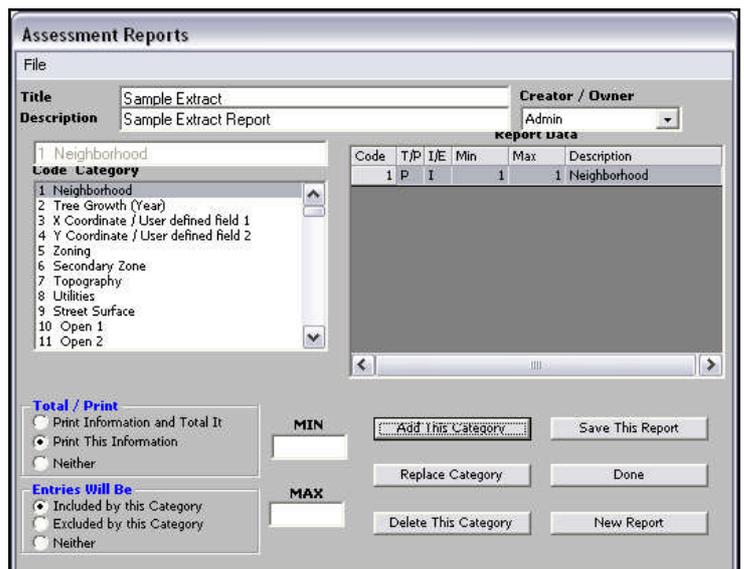


Running extract reports requires three main steps: 1. Creating or setting up an extract; 2. Running the extract; and 3. Processing the report.

### Setting Up An Extract

- From the General Entry Menu select **1. Real Estate > 4. Printing > 3. Extract for Reports/Labels.**
- Select whether or not the extract is going to be pulling the information from the *Regular Records* or the *Sales Records*.
- Select *File>New Report* to load the Extract Setup window.
- On this screen, first give the extract a *Title* and a *Description* in the appropriate fields at the top of the screen. This allows the extract to be identified at a later time. In addition to this, it is also possible to assign a *Creator/Owner* to the extract by choosing from the list of TRIO user names to the right of the *Title* and *Description* fields.
- Select the first category from the *Code Category* box to add to the extract.
- Select if the category should be *Printed and Totaled*, just *Printed* or *Neither* by selecting from the *Print/Total* box. If *Print Information and Total It* is selected, then at the end of the extract report it will display this category with a total of all the entries for the category. This is not a good option for categories such as *Neighborhood Code* as it would just total the value of the neighborhood codes. If *Print Information* is selected, then the extract report will list the category next to the account number with the value for that category. If *Neither* is selected then this category will not appear on the extract report, but it can still be used as a selecting category for the extract.

- Next, choose if this category should be a filtering category for the extract by selecting *Included by this Category*, *Excluded by this Category* or *Neither* in the *Entries Will Be* box. If either *Included by this Category* or *Excluded by this Category* is selected then a *MIN* and a *MAX* must be entered. For example, if the category selected is *Neighborhood Code* and 1 was entered for both the *MIN* and *MAX* fields and the option to *Include by this Category* was selected, then the extract would only return accounts that were in neighborhood 1. If *Exclude by this Category* was selected, it would return all the accounts except for those in neighborhood 1. **Note** - In some cases the *MIN* and *MAX* fields have certain formats that they need to be in.



## Real Estate: Extract Reports *CONTINUED*

8. Once all of the selections have been made for the category click on the *Add Category* button. This will add a line to the *Report Data* box above. In this box there are several columns of information. *Code* refers to the *Code Category* number from the *Code Category* list. The *T/P* column refers to the selection made in the *Total/Print* box. If *Print Information and Total It* was selected then a *T* will appear in the column; if *Print This Information* was selected then a *P* will be displayed; and if *Neither* was selected then an *N* will appear. The *I/E* column refers to the selection that was made in the *Entries Will Be* box. If *Included by this Category* was selected then an *I* will appear, if *Excluded by this Category* was selected then an *E* will be displayed and if *Neither* was selected then an *N* will appear. The *MIN* and *MAX* columns show what was entered in the corresponding fields for that category, and the description column displays that categories description.
9. Repeat the process of adding categories until the extract is complete and then click on *Save This Report* and then *Done*, or press the *F12* key on the keyboard.

### Running an Extract

Running an extract will filter out the accounts that match the entered extract criteria. This is done by:

1. Going to **4. Printing > 3.Extract for Reports/Labels** from the **Real Estate** main menu.
2. Select whether this extract is going to be run with *Regular Records* or *Sale Records*.
3. Select the extract to run, by clicking on it. This should put a check mark in the box to the left indicating that it has been selected. It is possible to select more than one extract at a time by checking off the ones to use. Multiple extracts can't be printed at the same time, but selecting more than one extract now will save having to return to the Extract screen to run another extract.
4. Press the *F12* key or go to the *File* menu and click on *Save & Continue*. If any records were found matching the criteria used in the extract a message box will appear saying that a certain number of records were found.
5. Click *OK* on that message box to continue. **Note** – To view the extracts created by a specific user, click on *Only this user's reports* in the *Show* box on the upper right hand side of the screen.

### Processing the Report

Once an extract has been run, it can then be used to run reports, as well as some other functions in the **Real Estate** program. Most frequently, an extract will be used to either run a report or to select the accounts that are going to appear on a report. To run reports for the information in the extract:

1. From the **Real Estate** main menu, select **4. Printing > 1. Reports**.
2. Click on *Extract Report* in the *Format* box.
3. Press the *F12* key on the keyboard, or go to the *File* menu and click on *Print Preview*. If multiple extracts were done on the *Extract for Reports/Labels* screen, a box will appear asking which extract to print. Highlight the one to use and press *F12*.
4. This report will only display the information from the extract, the account information such as account number and owner name will be on the left hand of the report, and the extract information will be on the right.
- On the **Reports** screen there is also the option of running a default report but to only use the accounts singled out by the extract. To do this, select *From Extract* in the *Print* box at the top of the screen, and then select what report to run from the *Format* box below. This will generate a report in the format selected, but that only lists the accounts from the extract.

## Real Estate: Extract Reports *CONTINUED*

### Editing an Extract

If the extract report needs to be edited, it is possible to go back and change the criteria within the extract. To do this, first select **4. Printing > 3. Extract for Reports/Labels**. Once there, check off the report to edit and then select *File > Edit Report*, or simply double click on the report to edit. This will bring up the original setup screen for that extract. From here, edit existing categories in the report data by selecting them, changing the appropriate options, and then clicking on *Replace Category*. If a category needs to be removed from the extract, delete it by clicking on the category and then clicking on *Delete This Category*. If categories need to be added that can also be done here by following the steps from the **Setting Up an Extract** section. Once all the changes have been made, click on *Save This Report*, and then on *Done*

To delete an existing extract, select that report and then select *File>Delete Report*. This will remove the saved extract from the list.