

The screenshot shows a mobile browser window titled 'iesMobile Page' with the address bar displaying 'localhost/request'. The browser interface includes a home button, a list icon, a keyboard icon, a settings gear, and a power button. The 'iesMobile' logo is visible in the top right corner. The main content area displays a table titled 'Value Drill: Accounts' with the following data:

Account Code	Name	Current Month	Year to Date
99-0-0-18015	Interest Paid	0.00	0.00
99-0-0-13085	Telephone	0.00	7,641.91
99-0-0-13090	Internet	0.00	4,937.46
99-0-0-13095	Rental Charges, Utilities	407.00	39,418.00
99-0-0-13010	Security Services	3,600.00	3,600.00
		4,007	55,597

Slide 1

Slide notes: In this tutorial we want to look at how to provide an Account Annual View drill. The page we are looking at is in fact an example of an Accounts Value drill and lists a number of Accounts. What we desire to have, is the ability to click on an Account that is listed here, and drill into it.

iesMobile Page
localhost/request

iesMobile

GL Account: - Annual View

Account Code 99-0-0-13010
Name Security Services

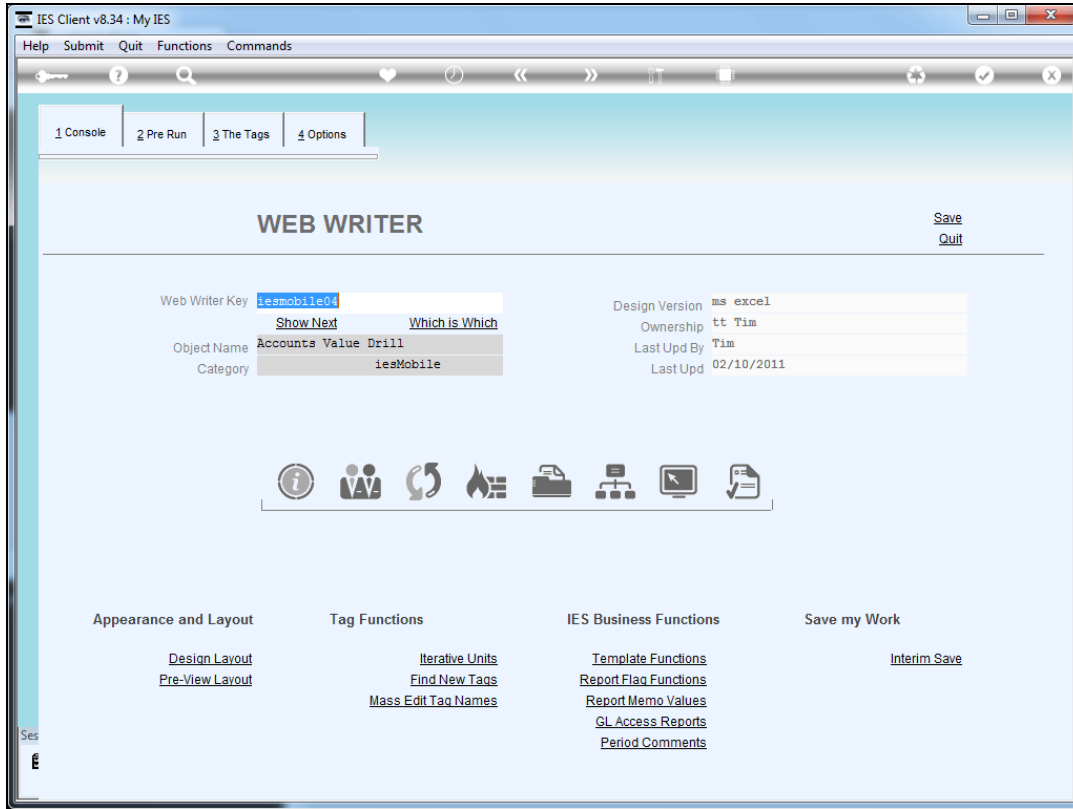
	Financial	Physical
B/f	0.00	
Mar 2011	0.00	0.00
Apr 2011	0.00	0.00
May 2011	0.00	0.00
Jun 2011	0.00	0.00
Jul 2011	0.00	0.00
Aug 2011	0.00	0.00
Sep 2011	0.00	0.00
Oct 2011	3,600.00	0.00
Nov 2011	0.00	0.00
Dec 2011	0.00	0.00
Jan 2012	0.00	0.00
Feb 2012	0.00	0.00
C/f	3,600.00	0.00 Total

Slide 2

Slide notes: Like this. This is an Account Annual View drill. It inherits the current Period settings as selected by the User on the base Report, and it gives us an annual view of the Account with Financial and Physical totals by month.

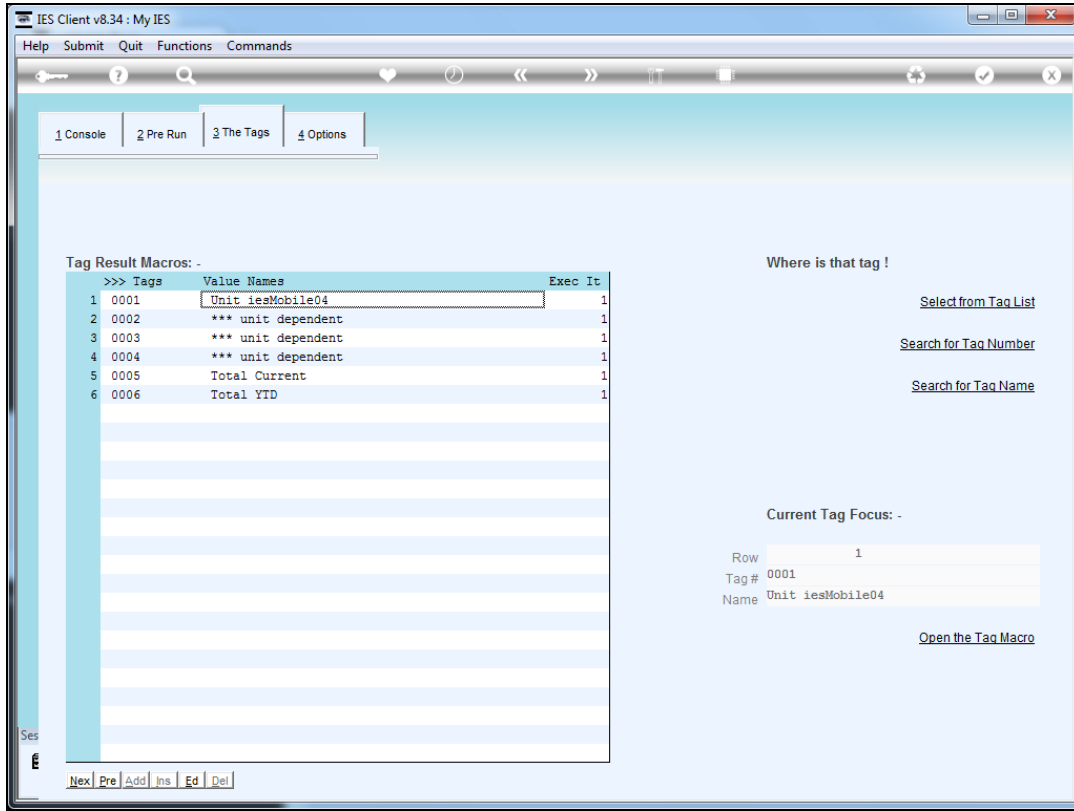
	Financial	Physical
B/f	0.00	
Mar 2011	0.00	0.00
Apr 2011	0.00	0.00
May 2011	0.00	0.00
Jun 2011	0.00	0.00
Jul 2011	0.00	0.00
Aug 2011	0.00	0.00
Sep 2011	0.00	0.00
Oct 2011	3,600.00	0.00
Nov 2011	0.00	0.00
Dec 2011	0.00	0.00
Jan 2012	0.00	0.00
Feb 2012	0.00	0.00
C/f	3,600.00	0.00 Total

Slide 3
Slide notes:



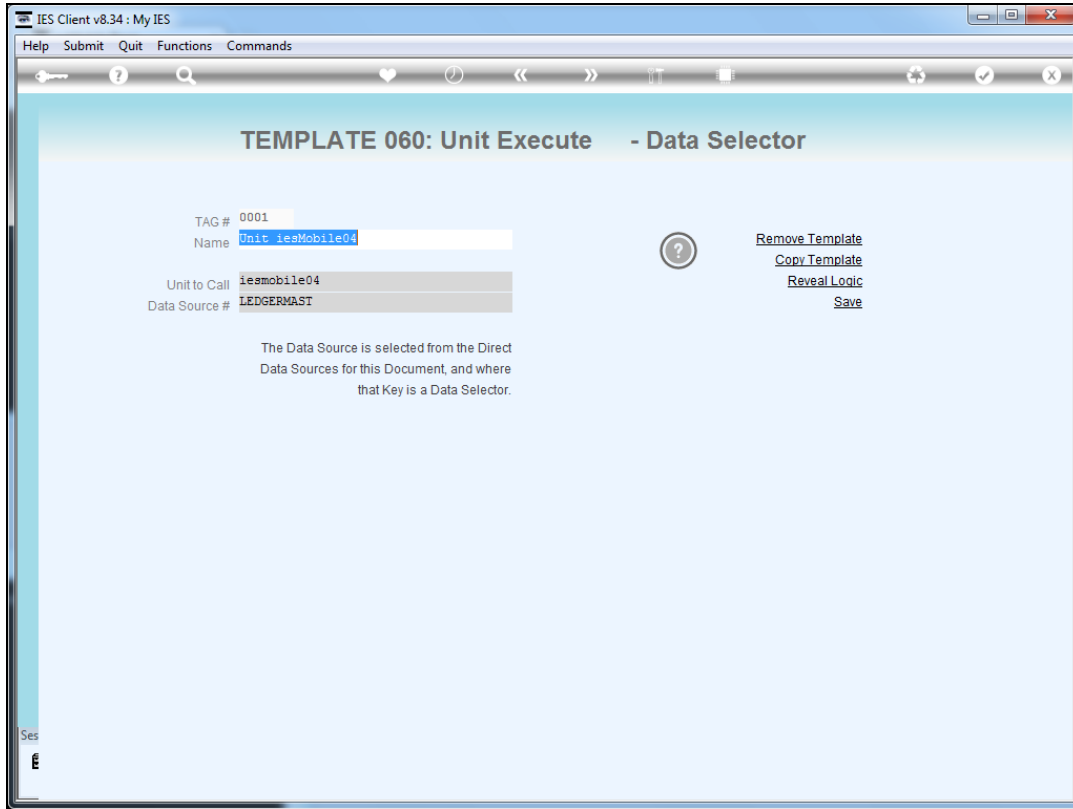
Slide 4

Slide notes: The page from which we drilled is this one. Now let's have a look at how it's done.



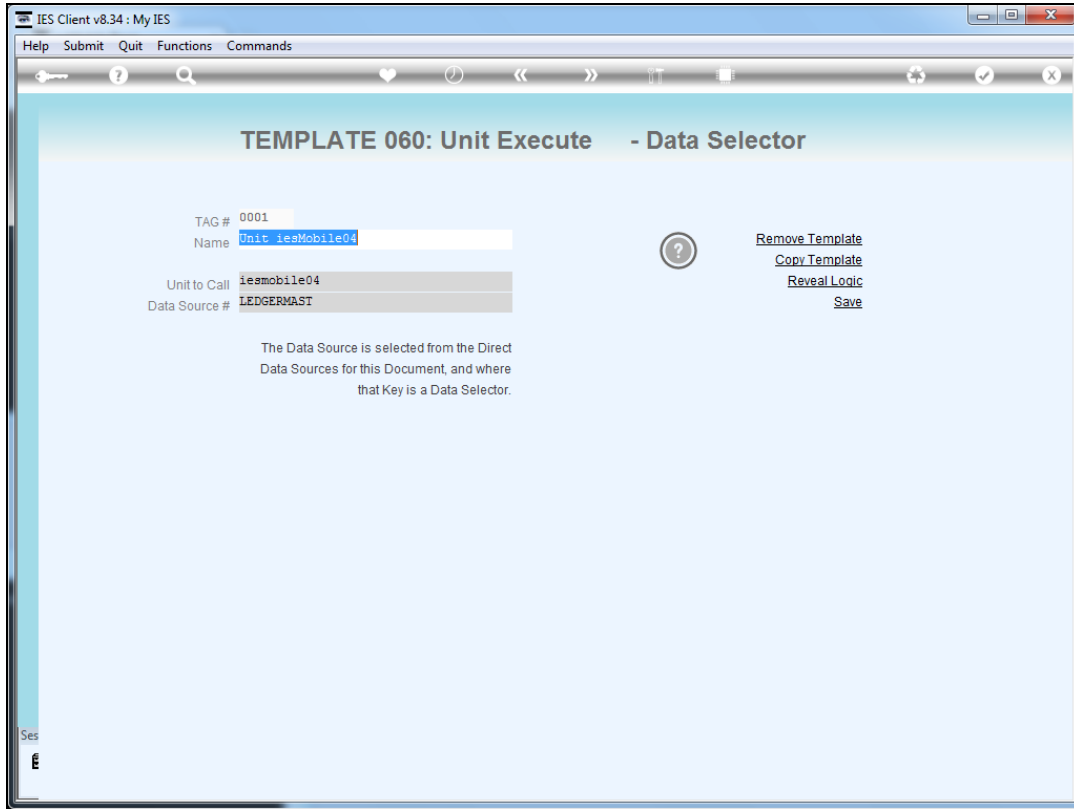
Slide 5

Slide notes: In fact, the page uses an iterative unit to compile the list of included Accounts in the result.

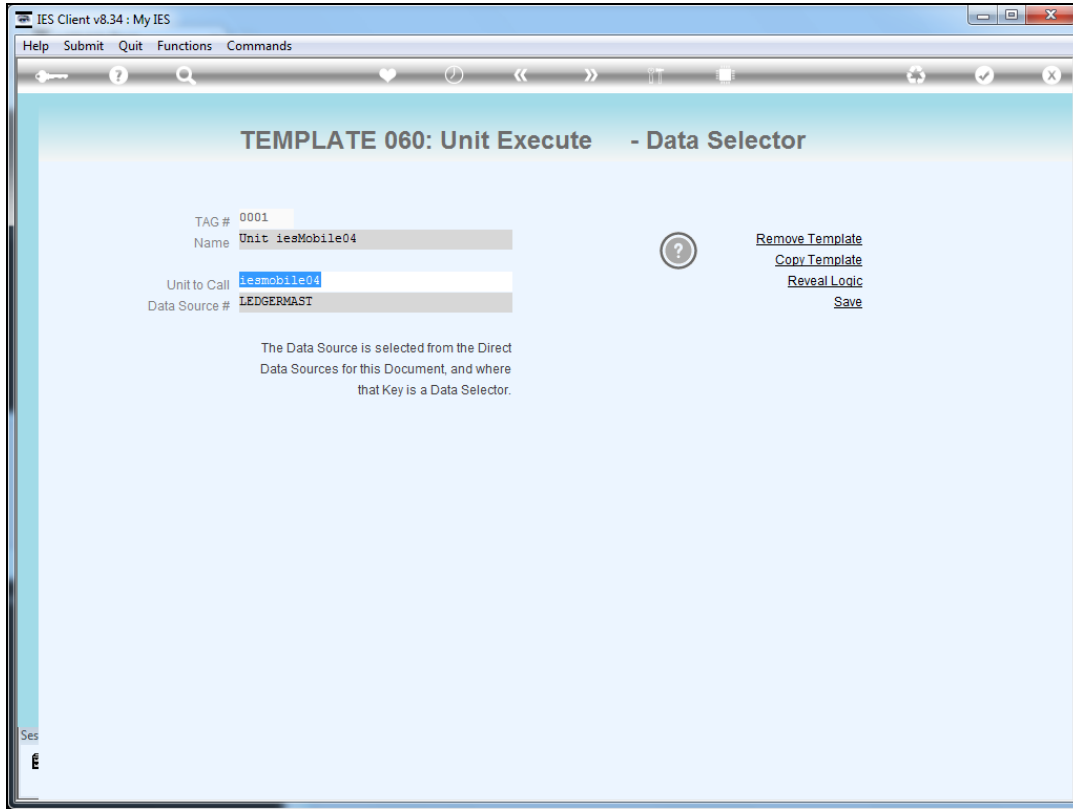


Slide 6

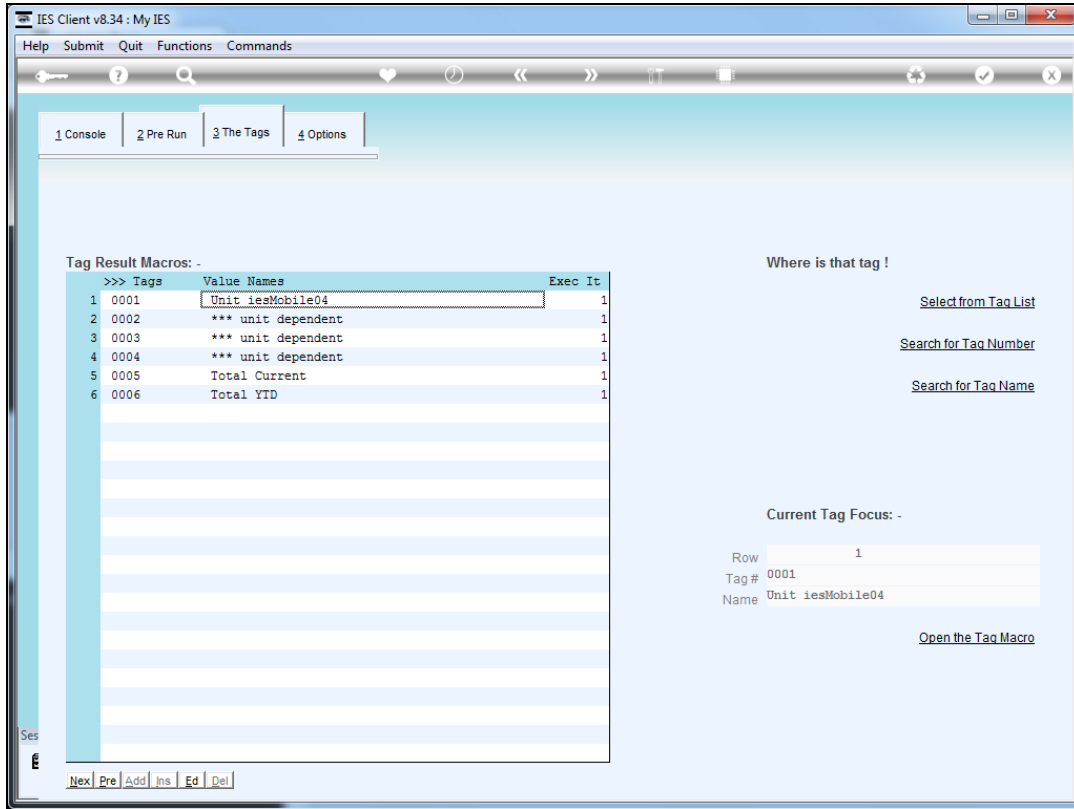
Slide notes: We can see which unit is being called, so let's have a look at the unit itself.



Slide 7
Slide notes:



Slide 8
Slide notes:



Slide 9
Slide notes:

The screenshot shows the IES Client v8.34: My IES interface. At the top, there is a menu bar with 'Help', 'Submit', 'Quit', 'Functions', and 'Commands'. Below the menu bar is a toolbar with various icons. The main area is divided into two panes. The left pane, titled 'Tag Result Macros: -', contains a table with the following data:

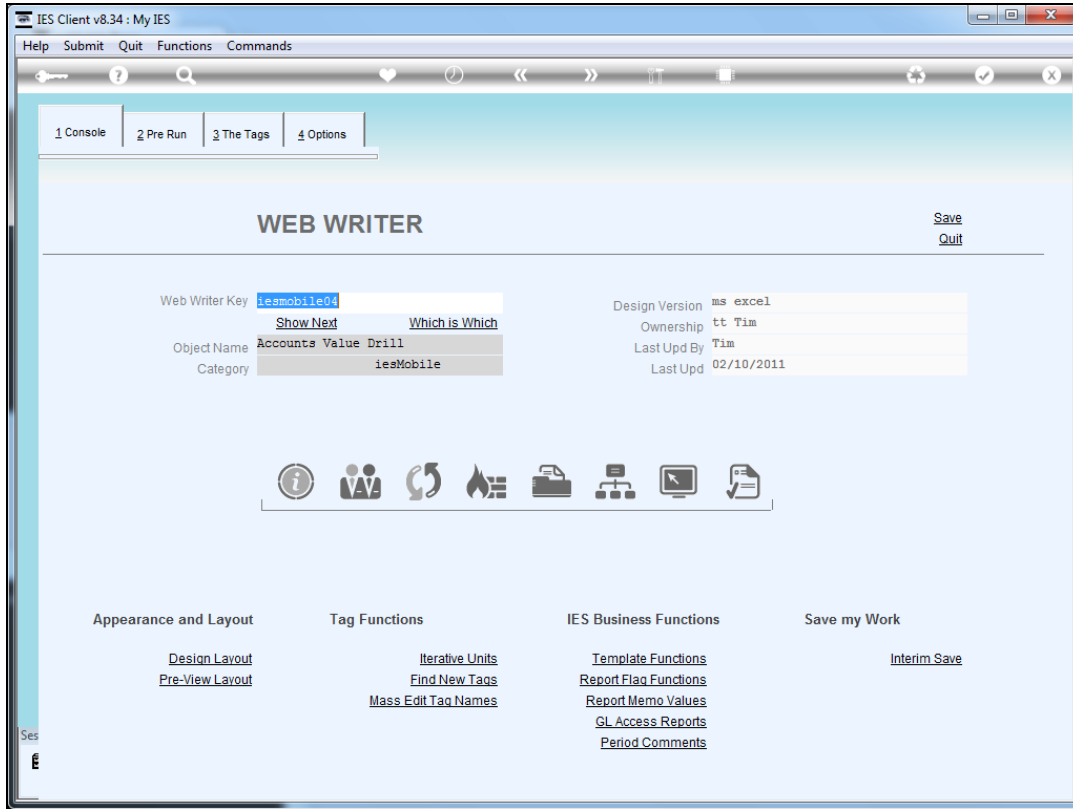
>>> Tags	Value Names	Exec	It
1	0001	Unit iesMobile04	1
2	0002	*** unit dependent	1
3	0003	*** unit dependent	1
4	0004	*** unit dependent	1
5	0005	Total Current	1
6	0006	Total YTD	1

The right pane, titled 'Where is that tag !', contains three search options: 'Select from Tag List', 'Search for Tag Number', and 'Search for Tag Name'. Below these is a section titled 'Current Tag Focus: -' with the following details:

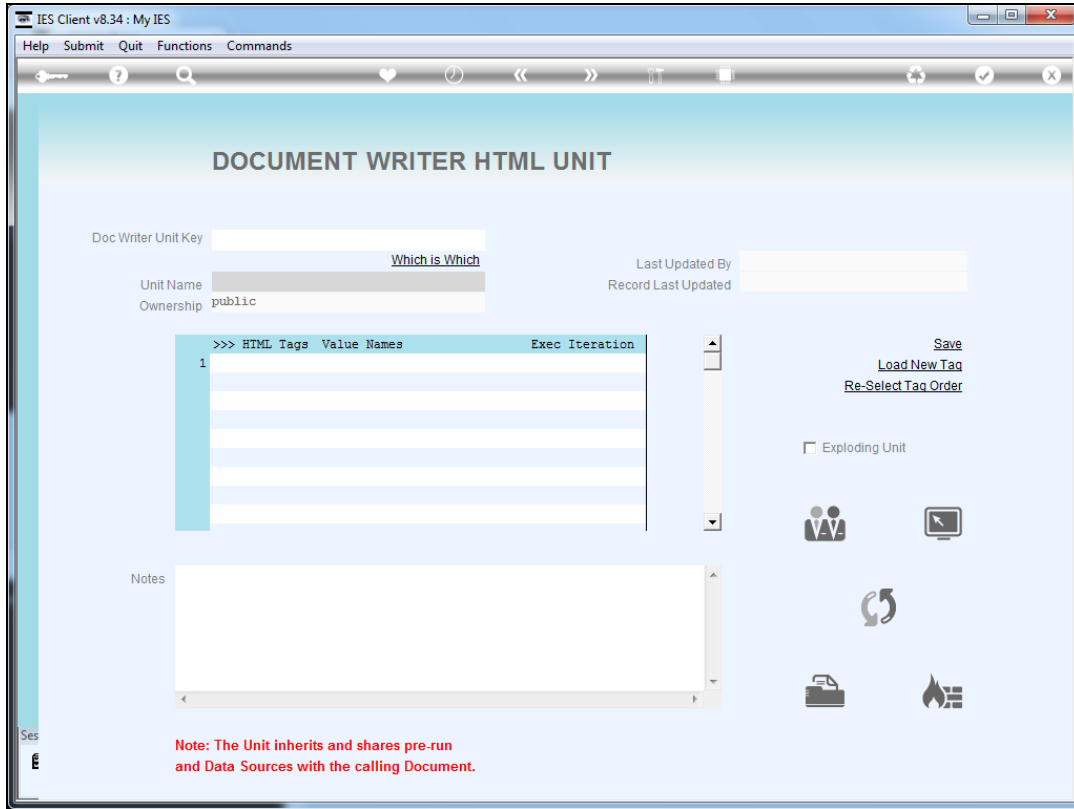
Row: 1
Tag #: 0001
Name: Unit iesMobile04

At the bottom of the right pane is a button labeled 'Open the Tag Macro'. The bottom of the interface features a status bar with the text 'Ses' and a keyboard shortcut indicator 'E'.

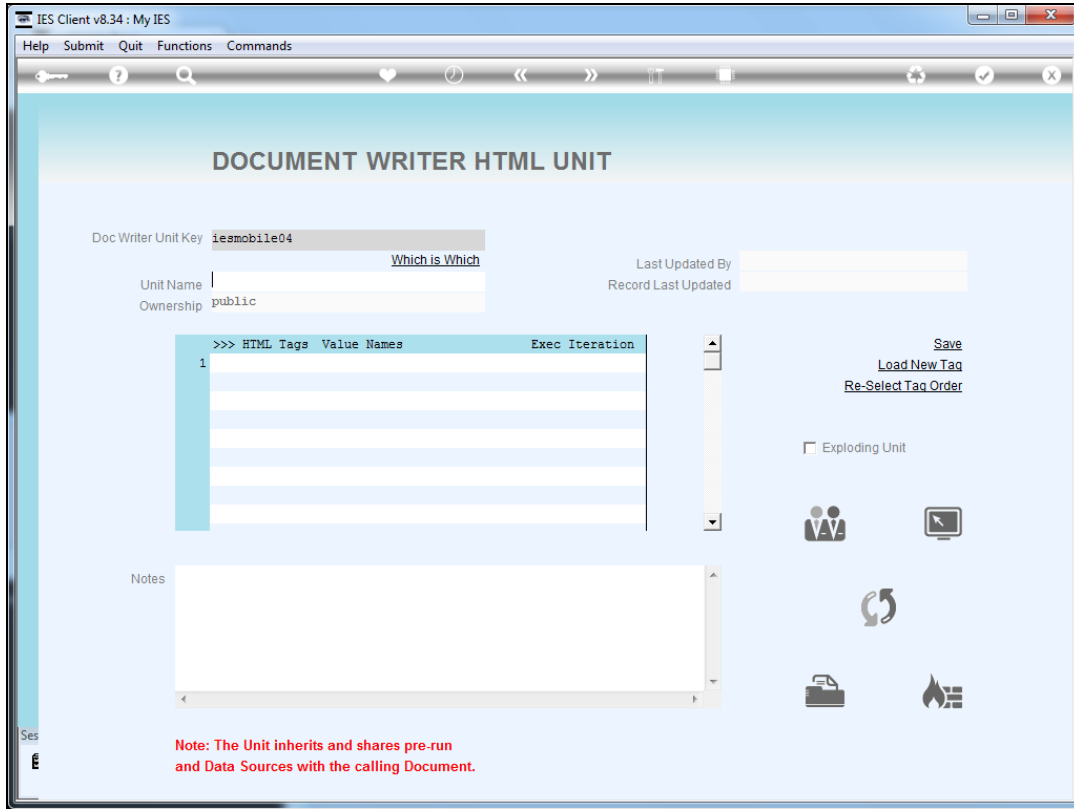
Slide 10
Slide notes:



Slide 11
Slide notes:



Slide 12
Slide notes:



Slide 13
Slide notes:

The screenshot displays the IES Client v8.34 interface. The main window is titled "TEMPLATE 062: Iterative Alpha with IKEY". The interface includes a menu bar (Help, Submit, Quit, Functions, Commands) and a toolbar with various navigation icons. The main content area is divided into several sections:

- Metadata:** TAG # 0001, Name Account Code, Tag Addressing relative.
- Data Source Information:** Data Source Name LEDGERMAST LEDGER MASTER, Data Field Name mkey Account Key, Drill Object iesmobile05 Accounts Annual View Drill.
- Formatting Options:** Alignment l: left justified, Result Width 30, Bold? normal, Underline? normal.
- Actions:** Remove Template, Copy Template, Reveal Logic, Save.
- Tag Configuration:** Tag Result always return a result, Operator =, Conditional Value.

At the bottom, a status bar shows session information: "Session Info: Tim [@ Plenty Investments - Iesbusiness1] is using IES". The taskbar at the very bottom includes icons for Wport, Application Wizard, Tag: Business Template, BGFRIEND-TAG-TEMPLATE62, and a clock showing 2011/10/13 14:39:38.

Slide 14

Slide notes: The Account code field on the Unit is where the drill is provided. Note the Template: Iterative Alpha with IKEY. With this Template, we have an automatic option to provide a drill, by just selecting the drill object.

IES Client v8.34 : My IES

Help Submit Quit Functions Commands

TEMPLATE 062: Iterative Alpha with IKEY

TAG # 0001

Name Account Code Tag Addressing relative

Data Source Name LEDGERMAST LEDGER MASTER

Data Field Name mkey Account Key

Drill Object iesmobile05 Accounts Annual View Drill

Alignment l: left justified

Result Width 30

Bold? normal

Underline? normal

Remove Template Copy Template

Reveal Logic Save

Tag Result always return a result

Operator =

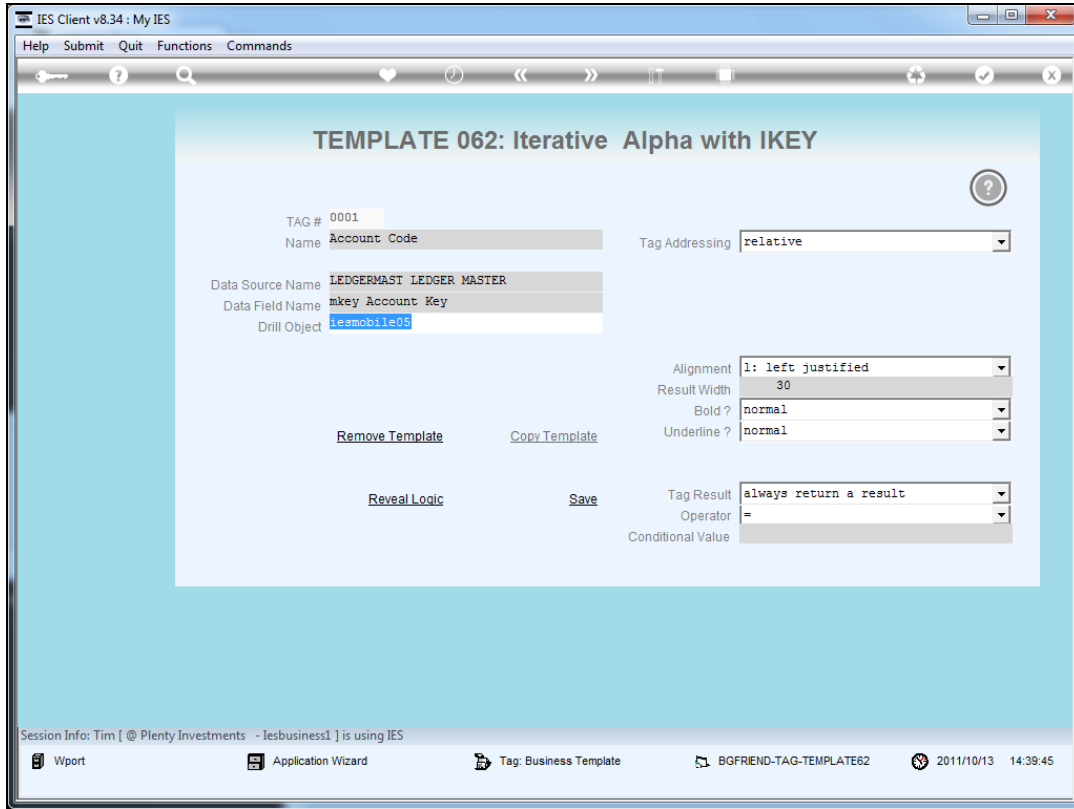
Conditional Value

Session Info: Tim [@ Plenty Investments - Iesbusiness1] is using IES

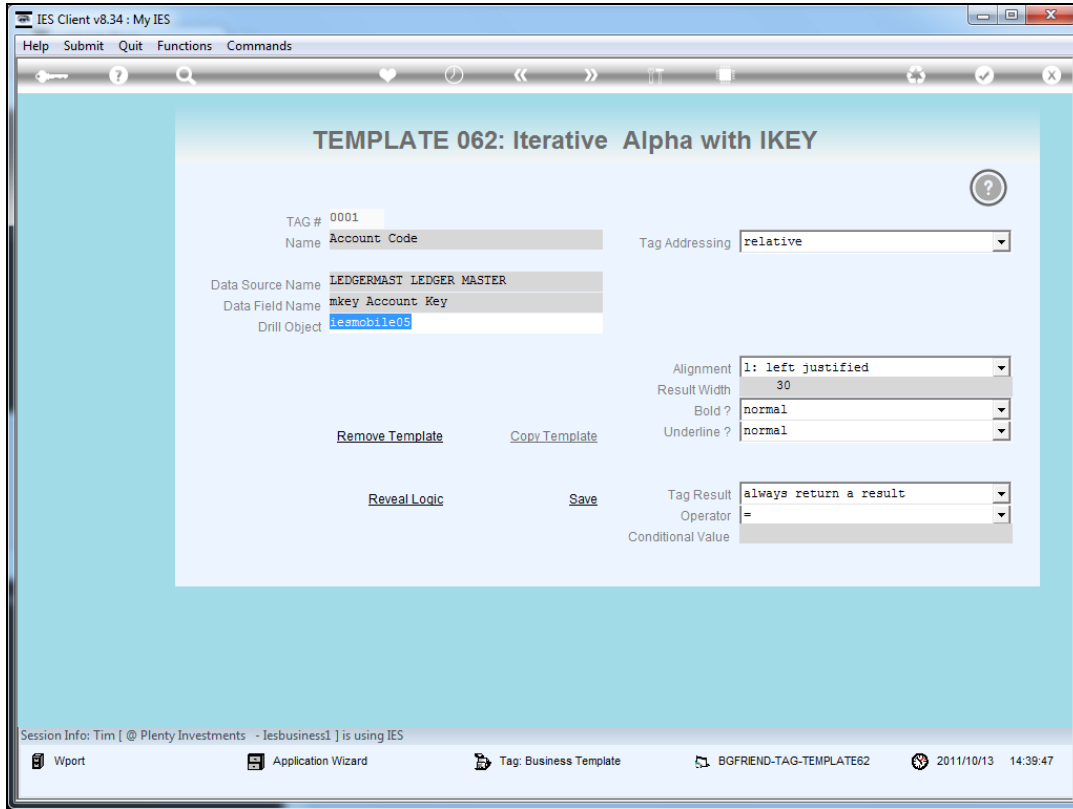
Wport Application Wizard Tag: Business Template BGFRIEND-TAG-TEMPLATE62 2011/10/13 14:39:41

Slide 15

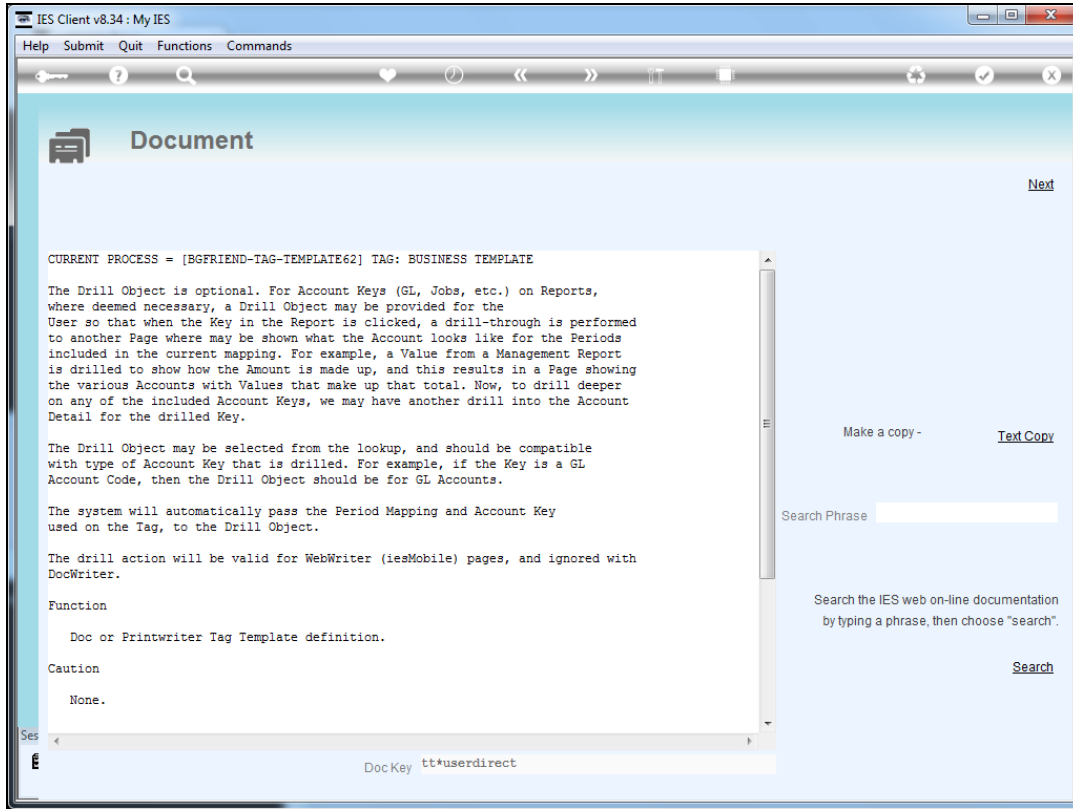
Slide notes: Of course, the drill object we choose should be an Account drill page. The system provides such a page that we can use, and it is called "iesmobile05" but we can also design additional pages with different formats and layouts.



Slide 16
Slide notes:

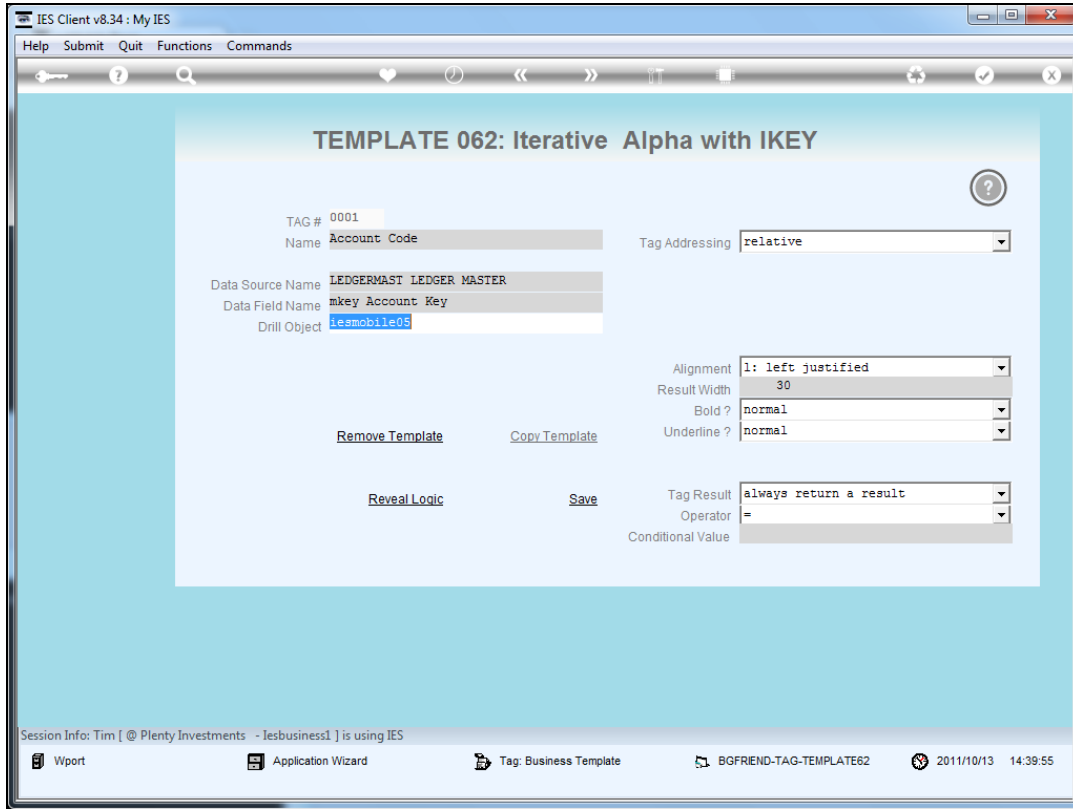


Slide 17
Slide notes:

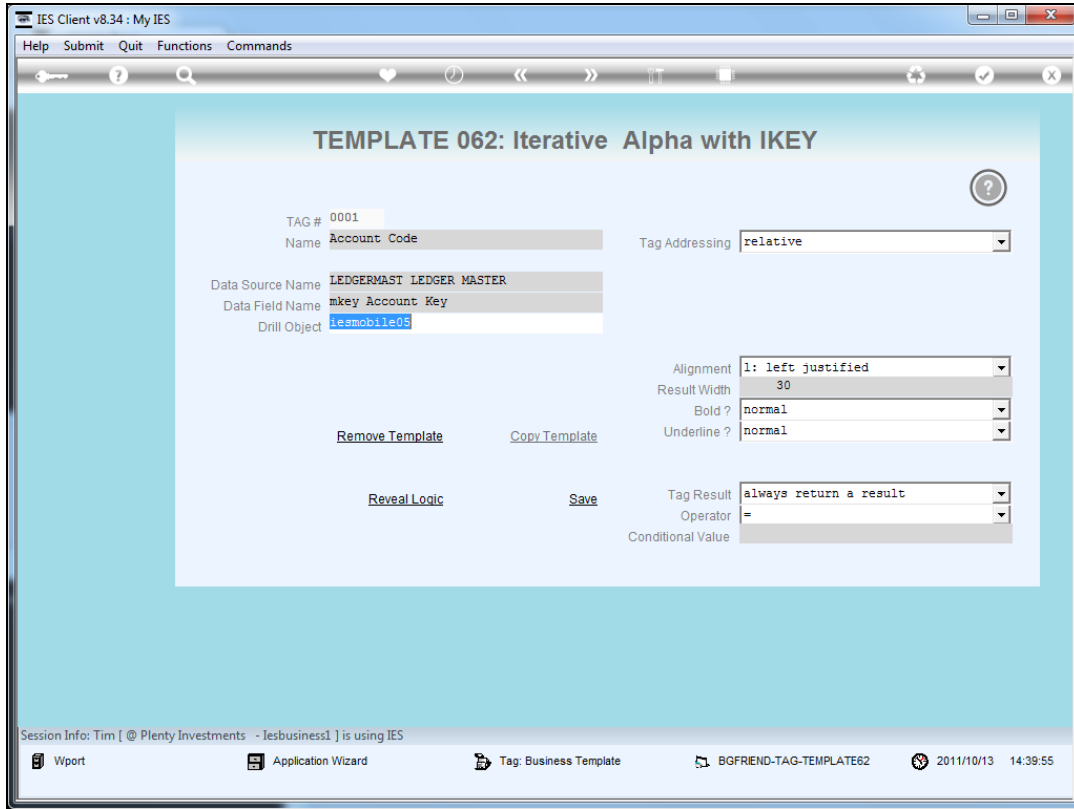


Slide 18

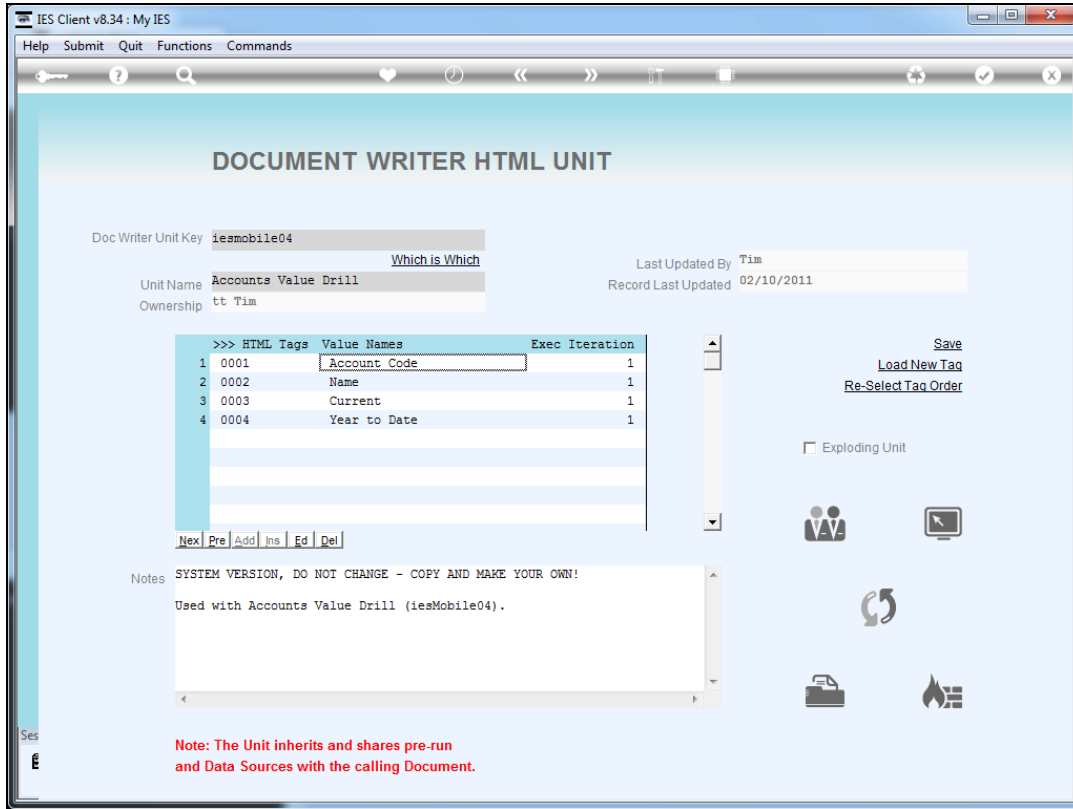
Slide notes: The Help explains.



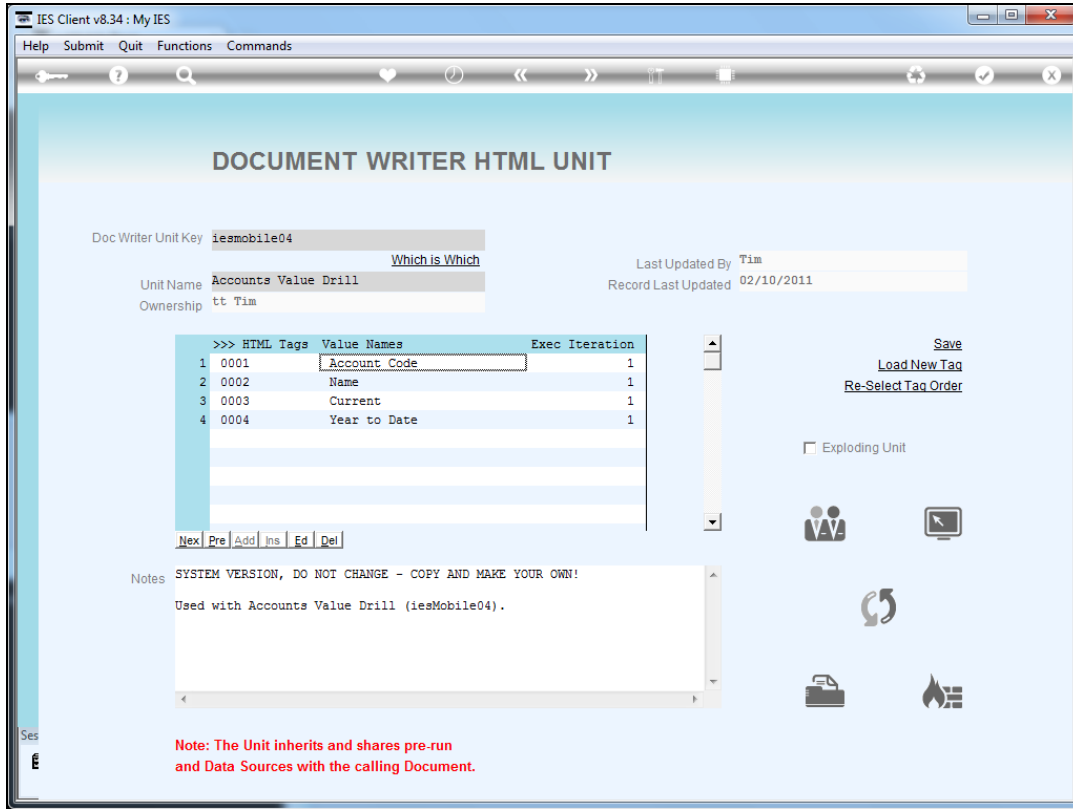
Slide 19
Slide notes:



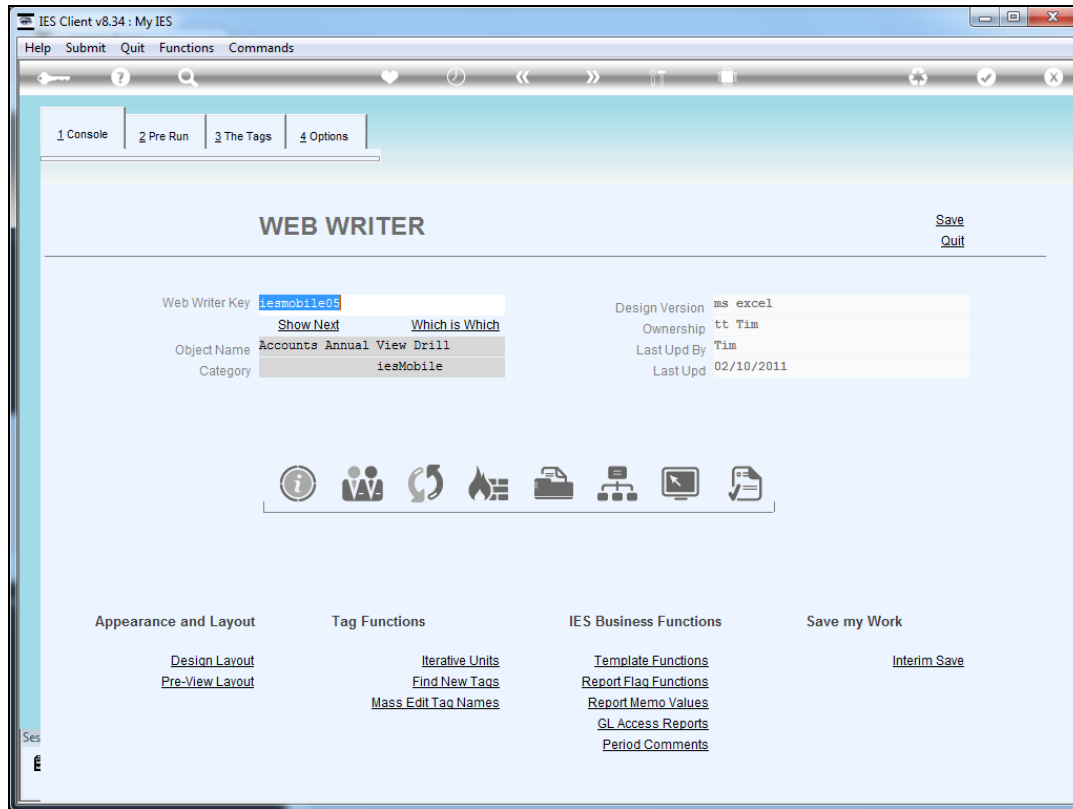
Slide 20
Slide notes:



Slide 21
Slide notes:

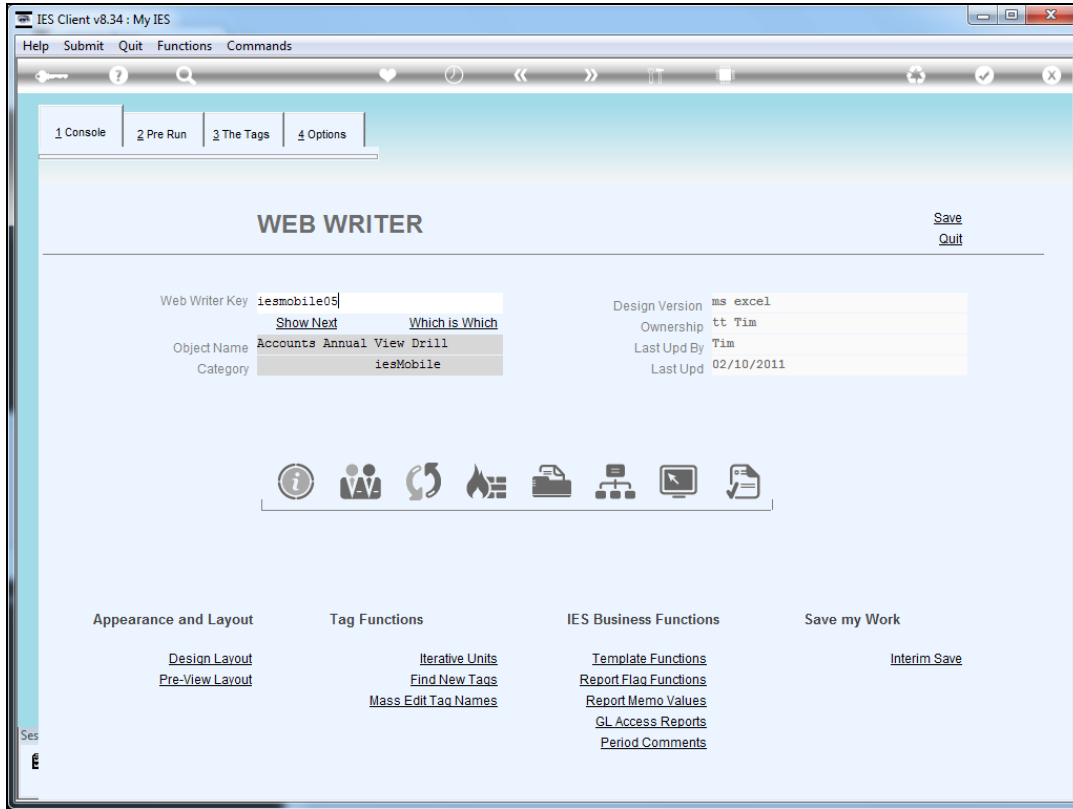


Slide 22
Slide notes:

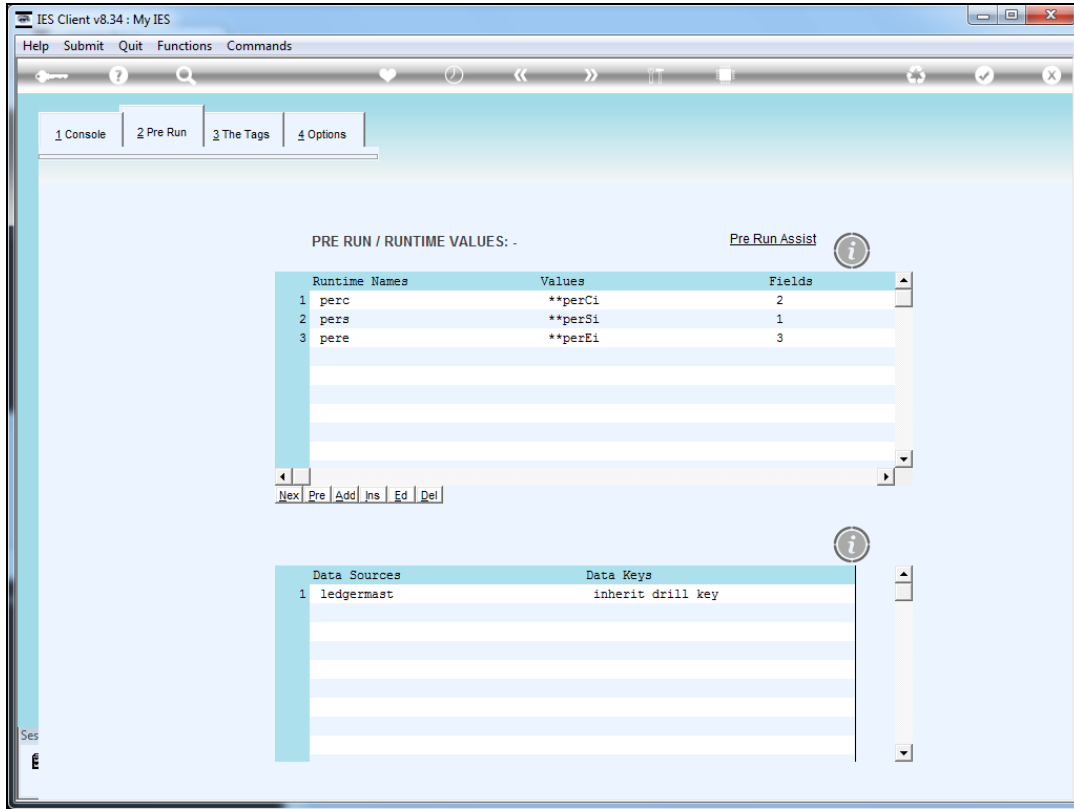


Slide 23

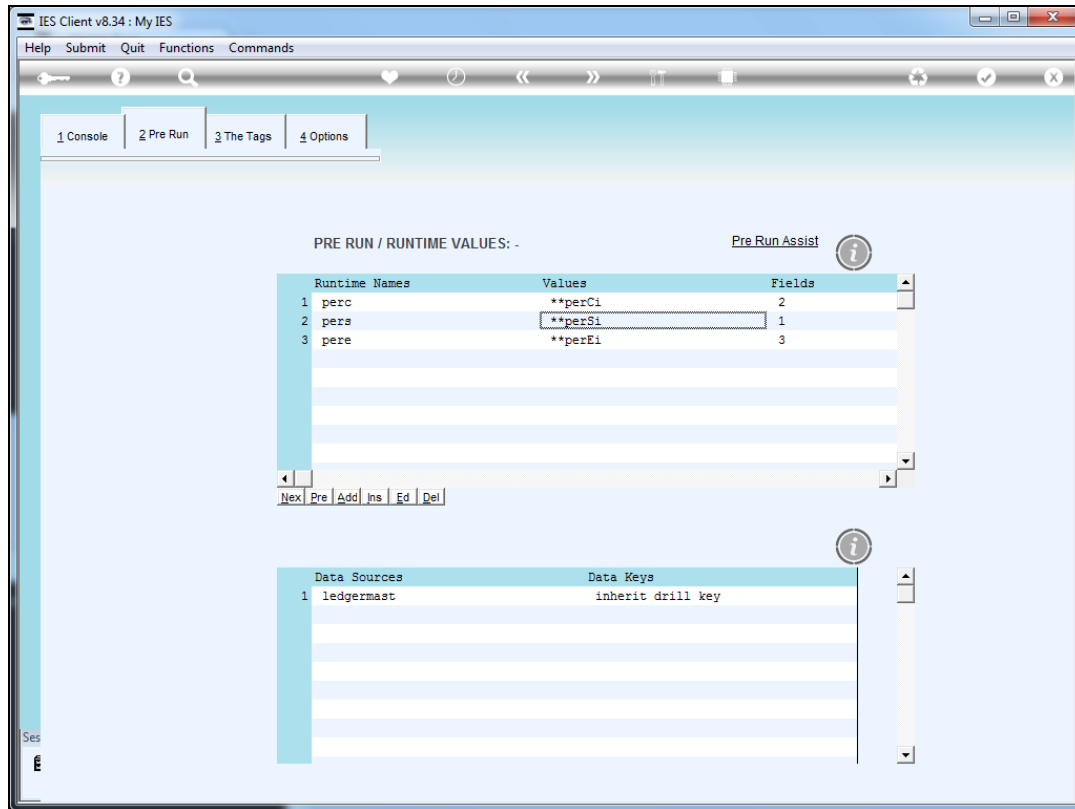
Slide notes: The object to drill, and that we have seen earlier, is "iesmobile05". If we wish to design additional drill objects for Account drills, then it is important to specify inherited periods, as shown for this object.



Slide 24
Slide notes:

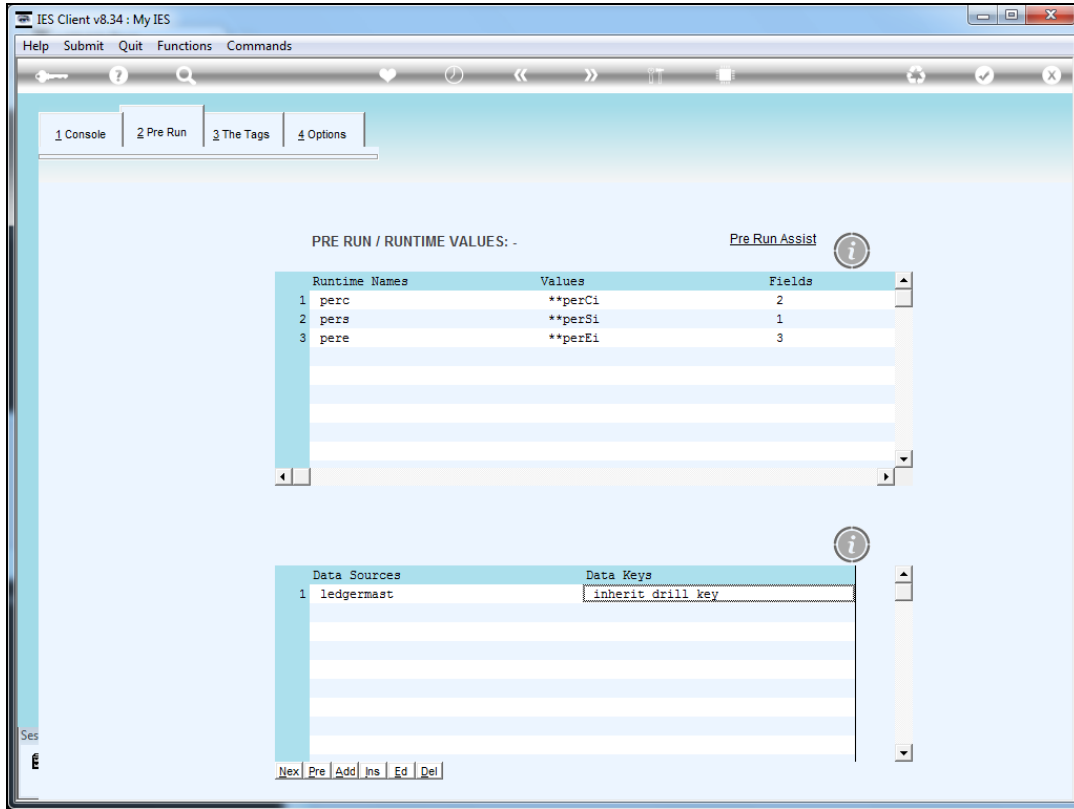


Slide 25
Slide notes:



Slide 26

Slide notes: And it is also important to list the appropriate masterfile at Data Sources, with the data key specified as "inherit drill key".



Slide 27
Slide notes: