# NTC Report Builder Procedures

General Edition

1. **Function**: Report Builder is a data retrieval tool. You can change the requirements on each field to narrow or expand your search. The purpose of this tool is to extract a standard set of data to be downloaded into Excel, Access or any other data base application.

2. **NTC Client Web Environment Access**: In the search bar of Internet Explorer, type clients.ntc-inc.com/clients   and click on Customer Access. Once you have the **NTC Client Gateway** on the screen, bookmark the page for future use. At the login screen, enter your Username and Password where indicated and click the Login button.
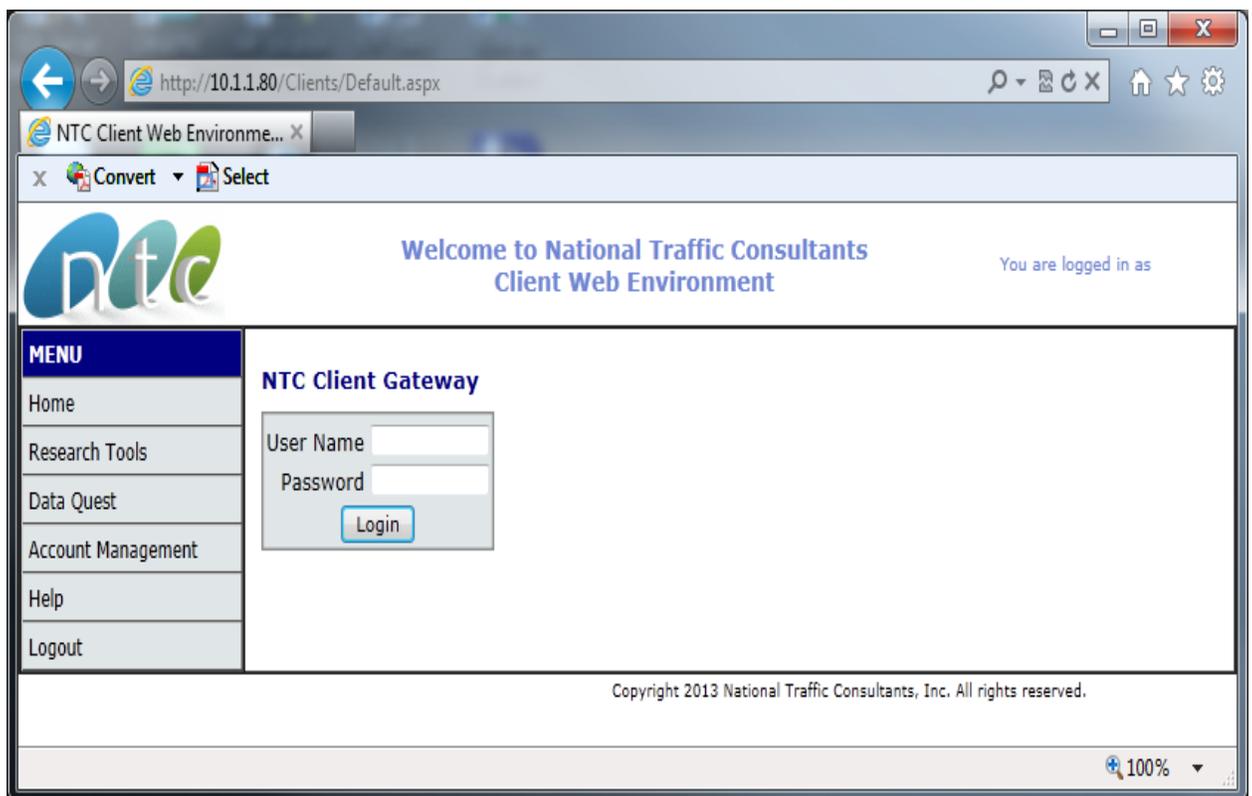
3. **Report Builder:** select Report Builder from the Menu

4. **Selection Criteria:** Report Builder allows you to select certain fields and not get all of the fields in Data Quest.

1) Login and click on Report Builder

2) Add a Name/Title to the Query

3) Select Arguments/Fields to be included on output report:

- **<= Less Than or Equal**: Use to find a smaller value <u>including</u> the value requested

- **<> (Not Equal):** Use to exclude values from searches. Where ShipperState <> 'FL' will exclude all records with ShipperState equal to FL.

- = **Equal:** Use to find a specific string or value – what you search for must match exactly with the information in the database or you will not receive any results

- **>= Greater Than or Equal**: Use to find a larger value <u>including</u> the value requested

- **> Greater Than:** Use to find a larger value <u>not including</u> the value requested

- **IN ('one','1','NV)**: To find records that have one of the values in (   ). *Each value must be in single quotes and each must be separated by a comma and the whole argument enclosed in parenthesis*. Example: ('AZ','CA','UT')

- **IS NOT NULL:** This finds records that have some value in the selected field. Blanks will be ignored.

- **IS NULL:** This is the inverse of IS NOT NULL, records that are blank in the selected field will be retrieved.

- **Like (use % as a wildcard)**: Use to find data containing a specific string in the search field. To find all records which start with a specific string, place the % at the end of the string, 'ABC%'. To find all records which end with a specific string, place the % at the beginning, '%SHOPS'. To find all records that contain a specific string but not sure where in the field the search value will occur, use the % at the beginning and the end. Example: %Rancho%Dominguez%

- **NOT IN ('one','1','NV)**: Same as IN but excludes what is in the list. Use to exclude values from searches like large carriers. Example: **('CRAN-5489-3', 'KUEH-2620-8')**

4) Save Query – in this example, it was named Monthly Output

5) You can change the FDR Date (FDR – this the weekly payment file date) range by entering new dates in the **Value** field in full date format, including slashes and clicking **Save**
For Example: To extract data for *one Batch (FDR) Date*, enter the same FDR date in *both of the date boxes*. This output will match the paid total for the date of that weekly batch (FDR). Duplicate and masterbill header records will be excluded.

   For Example: To find *all shipments* made in a particular month, enter *the beginning Ship Date* and the *ending Ship Date* to search for that information. This output will provide every record processed by NTC matching that shipment (freight bill) date.

6) Under **Query Options** and **Add New**, click on <u>Monthly Output</u>

7) Click **Preview** and Open the file
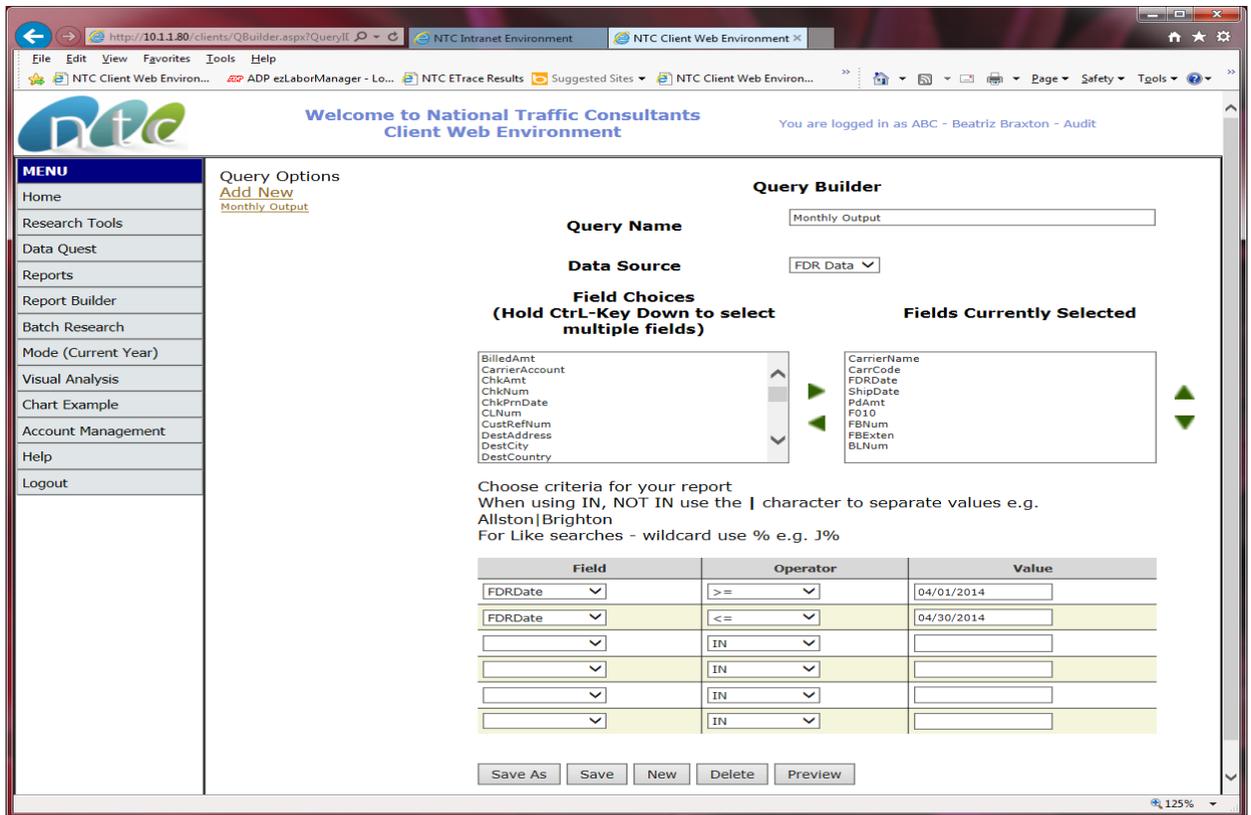
Once you run the query, it will ask you to open the file and tell you it is in another format (HTML) – select 'YES'
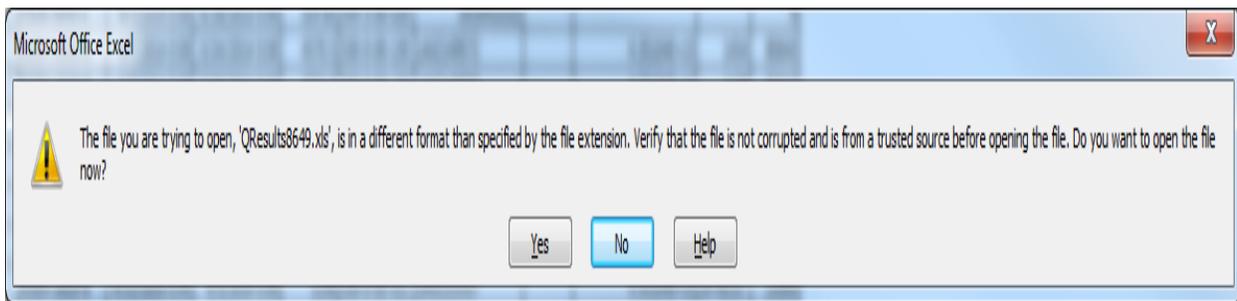
It will provide an output file that is in Web Page - HTML format. Click File **IMPORTANT:** *Once open in Excel and before any work is done on the file, go to **Save As** and save the file with a filename and as .xls or .xlsx to convert the file to actual Excel format.*