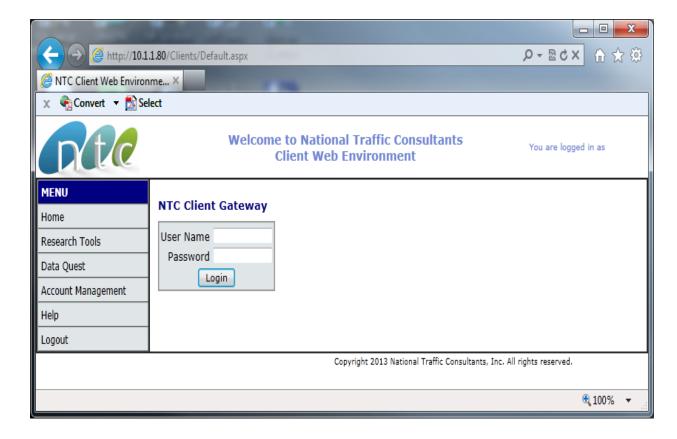
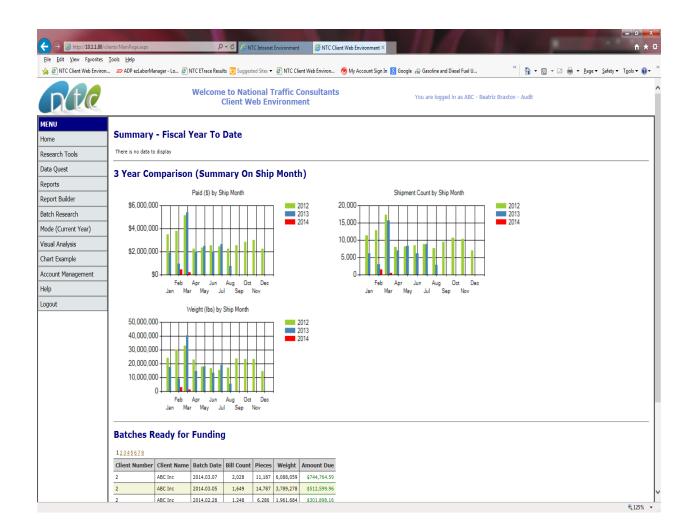
NTC Report Builder Procedures

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.
- NTC Client Web Environment Access: In the search bar of Internet Explorer, type <u>clients.ntc-inc.com/clients</u> 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 Monthly Output
- 7) Click **Preview** and Open the file

<u>F</u> ile <u>E</u> dit <u>V</u> iew F <u>a</u> vorites			Veb Environment × Client Web Environ	🛅 ¥ 🕅 ¥ 🖃 👼 ¥ Bage ¥ Safety ¥	<u>-</u> □ × ↑ ★ ☆ T <u>e</u> ols • @• [≫]	
Rte		ional Traffic Consultants Veb Environment	You are logg	ed in as ABC - Beatriz Braxton - Audit	^	
MENU Home Research Tools	Query Options Add New Monthly Output	Query Name	Query Build			
Data Quest Reports		Data Source	FDR Data	~		
Report Builder		Field Choices (Hold CtrL-Key Down 1	o select	Fields Currently Selected		
Batch Research		multiple fields)	-		
Mode (Current Year)		BilledAmt CarrierAccount		arrierName arrCode		
Visual Analysis		ChkAmt ChkNum		ORDate hipDate		
Chart Example		ChkPrnDate CLNum CustRefNum	F	JAmt 010 SNum		
Account Management		DestAddress DestCity	FI	3Exten LNum		
Help		DestCountry			- 1	
Logout	Choose criteria for your report When using IN, NOT IN use the character to separate values e.g. Allston Brighton For Like searches - wildcard use % e.g. J%					
		Field	Operator	Value	_	
		FDRDate V	>= ~	04/01/2014	- 1	
		FDRDate V	<=	04/30/2014	- 1	
		✓			_	
					_	
					- 1	
		· · ·				
		Save As Save New	Delete Preview			
					🔍 125% 🔻	

Once you run the query, it will ask you to open the file and tell you it is in another format (HTML) – select 'YES'

Microsoft Office Excel	AND REPAIR AND AND A PARTY OF THE	X
The file you are trying to a now?	pen, 'QResults8649.xls', is in a different format than specified by the file extension. Verify that the file is not corrupted and	d is from a trusted source before opening the file. Do you want to open the file
	Yes No Help	

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.

			QResults1900.x	ls - Microsoft Exce	21	_			
Home Insert Page Layout Formulas Data Review View PDF 🔞 🕳 🛪									
Pi	Calibri \cdot 11 \cdot A A sate \cdot B Z U \cdot \Box \cdot Δ booard \cdot Font	· · · · · · · · · · · · · · · · · · ·		6 • Brorma	itional Form at as Table * tyles * Styles		Era Insert → Σ Polete → U Format → Cells	ZI I	
B4 ▼ 5 FEDE-960-99 ¥									
	А	В	С	D	E	F	G	н	
1									
2	CarrierName	CarrCode	FDRDate	ShipDate	PdAmt	F010	FBNum	FBExten	BLNum)
3	FEDEX CUSTOM CRITICAL	FEDE-9709-1	4/21/2014 0:00	3/31/2014 0:0	4066.4	3	2702941	.91	1
4	FEDEX ERS	FEDE-960-99	4/7/2014 0:00	3/18/2014 0:0	9.23		7982417099	71	
5	FEDEX ERS	FEDE-960-99	4/7/2014 0:00	3/20/2014 0:0	7.12		5366740506	15	
6 FEDEX ERS		FEDE-960-99	4/7/2014 0:00	3/20/2014 0:0	13.55		5496735273	05	
	7 FEDE 050 00 4/7/2014 0:00				21 62		2067100000		
	ect destination and press ENTER or choose Past	te				ount: 2	100%		

NTC Report Builder Procedures