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# Report Writing: Basic Steps

## Working with Reports

The Research Wizard allows you to create multi-company reports that combine Zacks database items and your own calculated items. The Research Wizard also includes several sample reports. The reports have extension \*.rpd and are located in the :zir\inputs folder.

## Creating New Reports

There are two ways to create a report in the Research Wizard. You can display items used in your screening definition, or you can select items for your portfolio (Ticker List). When you build the screen definitions in the Research Wizard, the screening criteria items are automatically added to the **Report Definition** table. By default, the report will always include the Company Name and the Ticker items.

In order to run a report, you must have the Screening Criteria defined first. The Screening Criteria could be a screen definition or a portfolio.

## Creating Reports for Existing Portfolio

To create a report for the existing Ticker List, follow these steps:



1. From the **Portfolio** menu, select the Open Ticker List command or click the **Open Ticker List** button and choose your Ticker List.
2. The **Screening Criteria** table will show the Ticker List name and the number of companies in it.



3. To add a database item to your report, select that item from the *Items* section and click the **Add Item to Report** button (or from the **Report** menu choose the Add Database Item command).
4. The added item will appear in the **Report Definition** table.
5. To save the report for future uses, select the Save Report Definition command from the **Report** menu.
6. The *Report Definition* dialog box will appear and the default folder for the report files will be shown (usually :zir\inputs). To save the file in a different folder, click a different drive in the **Save in** box, or double-click a different folder in the folder list.
7. In the **File name** box, type a name for the report (all reports have extension \*.rpd).
8. Click **Save**.

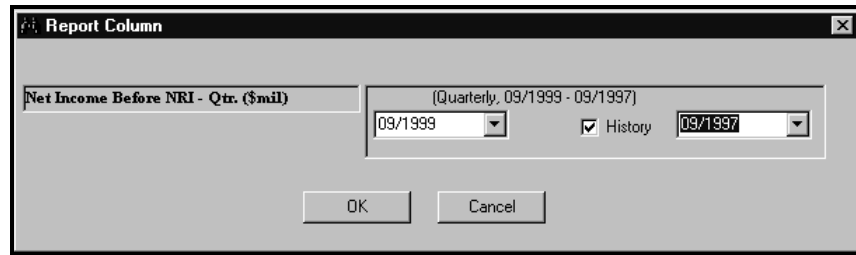
### Tip

*To add an item to your report with the mouse, highlight that item in the Items section and right-click your mouse. Select the Add Database Item to Report command from the menu.*

## Adding Multi-Period Data Items

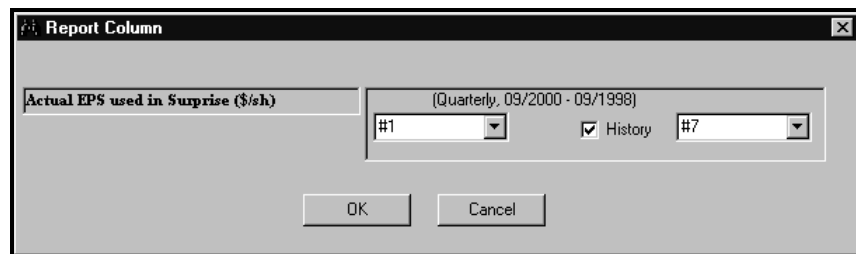
When adding items that have more than one period associated with them, the Report Column dialog box has a special check box: History. This option

allows you to add multiple data periods at once. After marking the History check box, simply select the desired time periods and click **OK**.



*Add several periods of data at once by selecting the History check box on the Report Column menu.*

To align data by the same period, you can specify your selection as period #1, #2, etc.



## Editing Report Definitions

One way to modify a report is to add a new item to the report definition. The other option is to manipulate the existing items.

### Adding Items to Report

To add an item to the report, follow these steps:

1. Open the report definition you want to edit. The **Report Definition** table will fill up.
2. Highlight a new item from the *Items* section.
3. From the **Report** menu, select the Add Database Item command or click the **Add Database Item** button.
4. The item will be added to the **Report Definition** table.
5. Save your report definition.



**Tip** *To add an item with the mouse, highlight that item in the Items section and right-click your mouse. Select the Add Database Item to Report command from the menu.*

### Editing Report Definitions Overview

To edit the report, from the **Report** menu, select the Edit Report Definition command to display the following report editing options:

- **Modify** – changes report column's name, alignment, format, time period and calculation.
- **Cut** – removes the selected item from the Report Definition table and places it on the Clipboard.
- **Copy** – copies the selected report item to the Clipboard.
- **Paste** – inserts the item currently placed on the Clipboard at the insertion point in the **Report Definition** table, and replaces any selection. This command is available only if you have cut or copied a report item.
- **Delete** – permanently removes the item from the **Report Definition** table.
- **Insert** – puts in the item currently placed on the Clipboard between the items at the insertion point in the **Report Definition** table. This command is available only if you have cut or copied a report item.

**Tip** To get the edit menu in the **Report Definition** table, right-click your mouse inside the **Report Definition** table.

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By default, you report definition will always have Ticker and Company items. These items cannot be deleted.

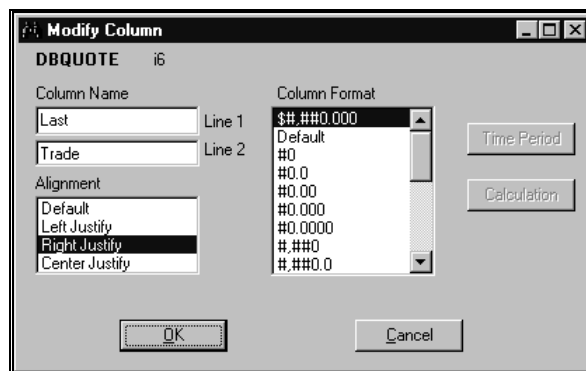
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### **Modify Report Overview**

Some options on the Modify menu are available for all types of items. These options include Column Name, Alignment, and Column Format.

Other options become enabled when the item used in a report has more than one data period or is a calculated item. These options are Time Period and Calculation.

To aid in your work, the database name and the item's number (or a calculation expression) are also noted at the *Modify Column* dialog box.



*Modify Column options will depend on the item.*

**Column Name** – used to change the item's name. If the item's name is long, you can use two lines for the name.

**Alignment** – used to change the item's position within the column. By default, all items are Right Justified.

**Column Format** – used to change the way numbers are displayed (the first format shown on the list is the default format).

- **Numbers Format:** columns can be formatted to display numbers with zero, one, or more decimal places and use the 1000 separator (.). You can also apply currency, percent, and comma styles to the numbers.

The following table explains the column formats:

| <b>Input</b> | <b>Format</b> | <b>Result</b> |
|--------------|---------------|---------------|
| 21366.8457   | #0            | 21367         |
| 21366.8457   | #0.0          | 21366.8       |
| 21366.8457   | #0.00         | 21366.85      |
| 21366.8457   | #0.000        | 21366.846     |
| 21366.8457   | #0.0000       | 21366.8457    |
| 21366.8457   | #,##0         | 21,367        |
| 21366.8457   | #,##0.0       | 21,366.8      |
| 21366.8457   | #,##0.00      | 21,366.85     |
| 21366.8457   | #,##0.000     | 21,366.846    |
| 21366.8457   | #,##0.0000    | 21,366.8457   |
| 21366.8457   | \$\$#,##0     | \$21,367      |
| 21366.8457   | \$\$#,##0.0   | \$21,366.8    |
| 21366.8457   | \$\$#,##0.00  | \$21,366.85   |
| 1.839        | #0%           | 2%            |
| 1.839        | #0.0%         | 1.8%          |
| 1.839        | #0.00%        | 1.84%         |

- **Text Capitalization Format:** there are three additional column format options, available for the text items:

| <b>Format</b> | <b>Result</b> |
|---------------|---------------|
| Text(Upper)   | UPPERCASE     |
| Text(Lower)   | lowercase     |
| Text(Default) | Title Case    |

**Time Period** – used to change item’s period (available for time-series items only).

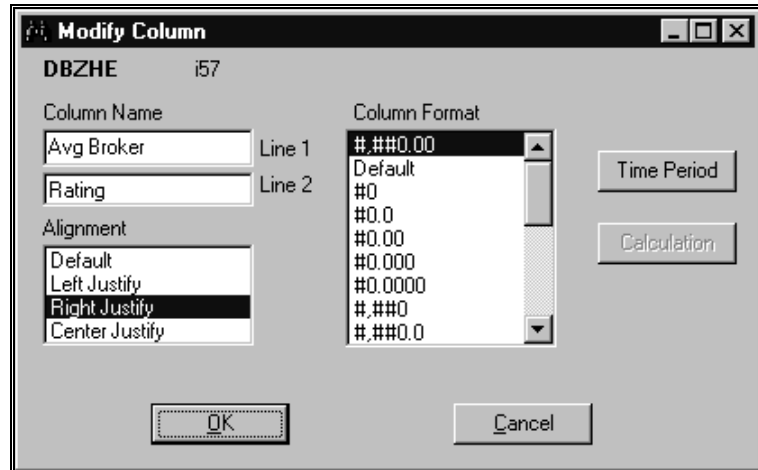
**Calculation** – used to change the calculation for the custom item (Calculation Expression).

### **Modify (Edit Report Menu)**

The report item can be a database item or a calculated item. This will determine the additional edit options.

#### **Modifying Database Item**

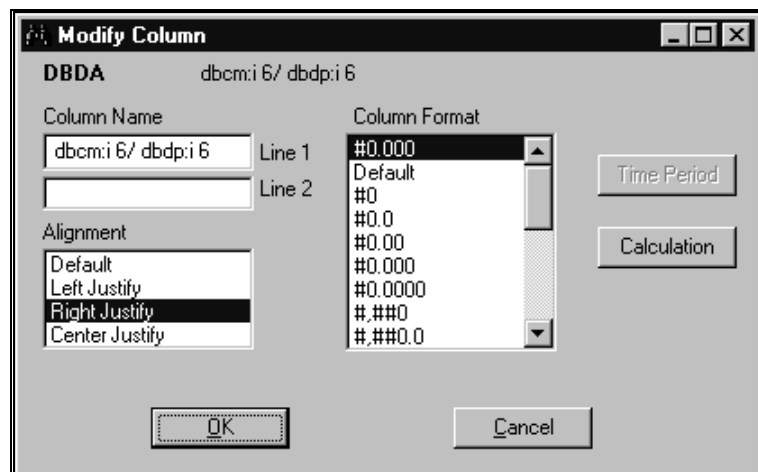
1. Open the report definition you want to edit. The **Report Definition** table will fill up.
2. From the **Report Definition** table, highlight the item you want to modify and double-click it (or right-click your mouse on that item to bring up the Edit menu and select the Modify option). The *Modify Column* dialog box will appear, where item number and database association are noted.



3. Modify the parameters for your report and click **OK**.

### Modifying Calculated Item

1. Open the report definition you want to edit. The **Report Definition** table will fill up.
2. From the **Report Definition** table, highlight the calculated item you want to modify and double-click it (or right-click your mouse on that item to bring up the Edit menu and select the Modify option). The *Modify Column* dialog box will appear, where item formula will be noted.



3. Click the **Calculation** button (if the calculation expression was build using database that is not currently active, you will be prompted to switch to that database). The Calculation Expression dialog box will appear. Make the necessary changes there and click **OK**.

### Cut (Edit Report Menu)

To cut a report item, follow these steps:

1. Open the report definition you want to edit. The **Report Definition** table will fill up.
2. Highlight the data item you want to cut.

3. From the **Report** menu, select the Edit Report Definition command and select the Cut option. You can then paste or insert the item anywhere in the report definition (except for two default items: Ticker and Company).

**Tip** *To get the Edit menu in the Report Definition table, right-click your mouse inside the Report Definition table.*

### **Copy (Edit Report Menu)**

To copy a report item, follow these steps:

1. Open the report definition you want to edit. The **Report Definition** table will fill up.
2. Highlight the data item you want to copy.
3. From the **Report** menu, select the Edit Report Definition command and select the Copy option. (If you want to copy these items to another report definition, switch to that report).
4. In the **Report Definition** table, click where you want the item to appear.
5. To replace the item, from the **Report** menu, select the Edit Report Definition command and select the Paste option.
6. To add the item, from the **Report** menu, select the Edit Report Definition command and select the Insert option.

**Tip** *To get the Edit menu in the Report Definition table, right-click your mouse inside the Report Definition table.*

### **Paste (Edit Report Menu)**

This command is available only if you have cut or copied a report item. In the **Report Definition** table, highlight the item you want to replace. From the **Report** menu, click Edit Report Definition command and select the Paste option.

**Tip** *To get the Edit menu in the Report Definition table, right-click your mouse inside the Report Definition table.*

### **Delete (Edit Report Menu)**

To delete a report item, follow these steps:

1. Open the report definition you want to edit. The **Report Definition** table will fill up.
2. Highlight the item you want to delete.
3. From the **Report** menu, select the Edit Report Definition command and select the Delete option.

**Tip** *To get the Edit menu in the Report Definition table, right-click your mouse inside the Report Definition table.*

### **Insert (Edit Report Menu)**

This command is available only if you have cut or copied a report item. In the **Report Definition** table, click where you want the item to appear. To add the item to the report, from the **Report** menu, click Edit Report Definition command and select the Insert option.

**Tip** *To get the Edit menu in the Report Definition table, right-click your mouse inside the Report Definition table.*

## Clearing Report Definition

### *To Clear both Screening Criteria and Report Definition Tables*



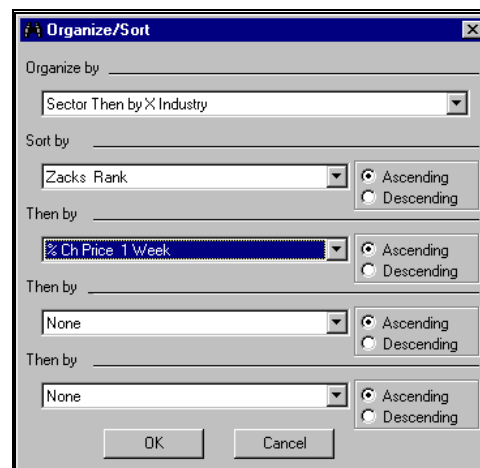
1. From the **Screen** menu, select the Clear Criteria command or click the **Clear Criteria** button.
2. The message “Would you like to clear the Report Definition?” will appear. Click **Yes**.
3. Both the **Screening Criteria** and the **Report Definition** tables will be emptied.

### *To Clear the Report Definition Table Only*

1. From the **Report** menu, select the Clear Report Definition command.
2. The **Report Definition** table will be emptied.

## Sorting and Organizing Reports

You can manipulate the information displayed in your reports using the Sort and Organize options. These features are accessed through the **Data** menu.



*Organize/Sort Report dialog box.*

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**By default, all new reports are sorted by Zacks M (Medium) Industry.**

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## Organize Report Options

An Organize option is used to classify companies in the report. Your report can be organized by

- Zacks X (Expanded) Industry
- Zacks X (Expanded) Sector
- Zacks (M) Medium Aggregate Industry

There are two more special options that allow two levels of organization:

- Organize by Zacks Expanded Sector and then by Expanded Industry designations

- Organize by Zacks Expanded Sector and then by Medium Aggregate Industry designations

If you do not want to have your report organized, select **None** from the pull-down menu.

## Organizing Reports

You can organize your reports before or after you run them. To organize a report, follow these steps:



1. From the **Data** menu, select the Organize/Sort command or click the **Organize/Sort** button. The *Organize/Sort* dialog box will be displayed.
2. From the *Organize by* pull-down menu, choose the desired organize option and click **OK**.
3. After organizing the report, you will be able to sort on up to three additional items. If you selected two levels of organization, you will be able to sort on up to two additional items.

## Sorting Reports

You can sort your reports based on the contents of two or more columns. When you sort, the Research Wizard rearranges the report based on the sort order you specify. You can sort reports in ascending (1 to 9, A to Z) or descending (9 to 1, Z to A) order, based on the contents of one or more columns.

To sort the report, follow these steps:



1. From the **Data** menu, select the Organize/Sort command or click the **Organize/Sort** button. The *Organize/Sort* dialog box will be displayed.
2. Select the first sorting item in the *Sort by* box and the sort order – ascending or descending.
3. If the column you specify in the *Sort by* box has items that have identical values for several companies (example, Zacks Rank of 1), you can sort the values further by specifying another column in the first Then By box. If there are duplicate items in the second column, you can specify a third column to sort by in the second Then By box (the Research Wizard allows for sort on up to four items).
4. Click **OK**.

## Running Existing Reports

To run an existing report, follow these steps:

1. From the **Report** menu, select the Open Report Definition command. The *Report Definition* dialog box will appear. (Saved reports usually appear in :zirl\inputs folder and have extension \*.rpd).
2. Select a report and click **OK**. The **Report Definition** table will fill up.
3. Click **Run Query** to display the report.

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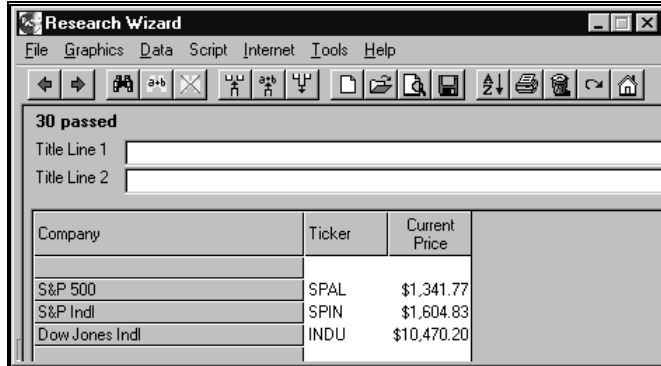
The Research Wizard has several sample pre-formatted reports.

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## Adding/Removing Indices Options in Reports

By default, every report includes data for S&P 500, S&P Industrial, and DJIA Indices at the top of the report. You can add or remove these indices, by clicking *Indices* from the report output **Data** menu.



## Adding Titles to Reports

To add title to your report, type the desired name in the provided report Title section at the report output menu (remember to save the report definition).

