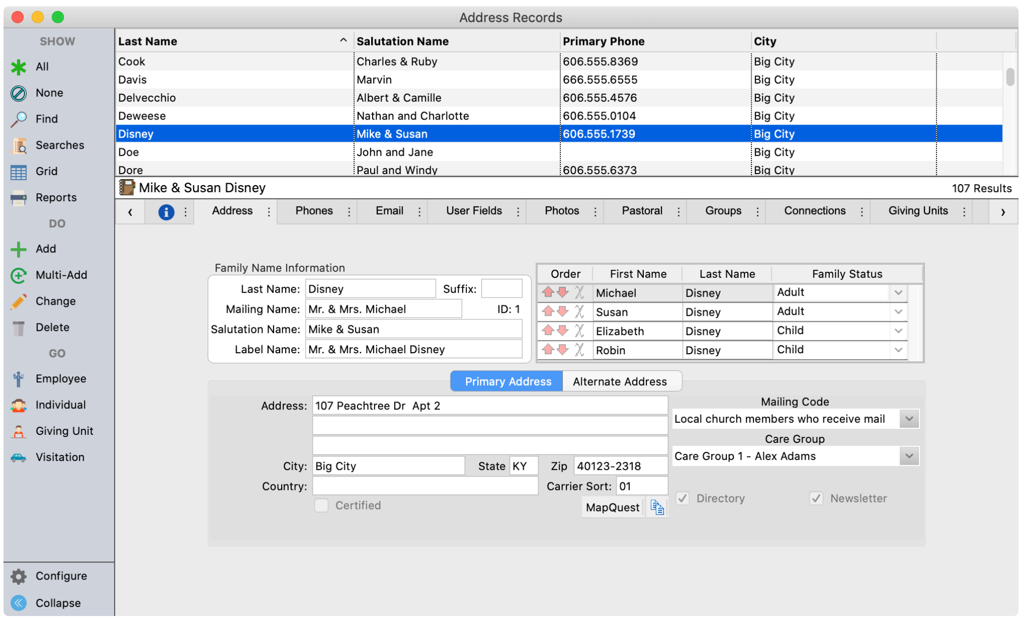
Record Windows

Many of the data entry windows in CDM+ are "Record Frame" windows and share common features. Windows with names ending in "Records" are record frame windows.

Re-sizing the Window

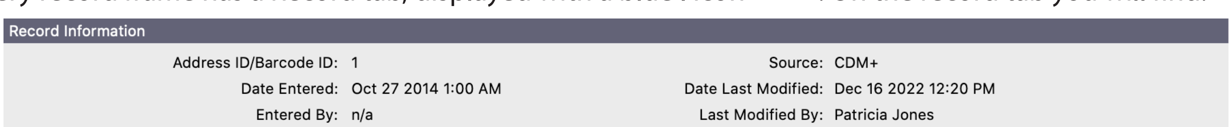
A record frame window may be re-sized by placing your cursor on the border of the window until it changes to a double-arrow, then clicking and dragging it larger or smaller. The results list area may be enlarged by placing your cursor on the line above the menu tabs until it changes to arrows, then clicking and dragging it larger or smaller.



Tabs

Every record frame has at least two tabs. Each tab displays specific information on the record or for related records.

Every record frame has a Record tab, displayed with a blue I icon . On the record tab you will find:



ID/Reference - The unique identifying number for this record

Source - Where this record was added, such as CDM+ or Engage

Date Entered - When the record was entered

Date Last Modified - When the record was last modified

Entered By - Who entered the record

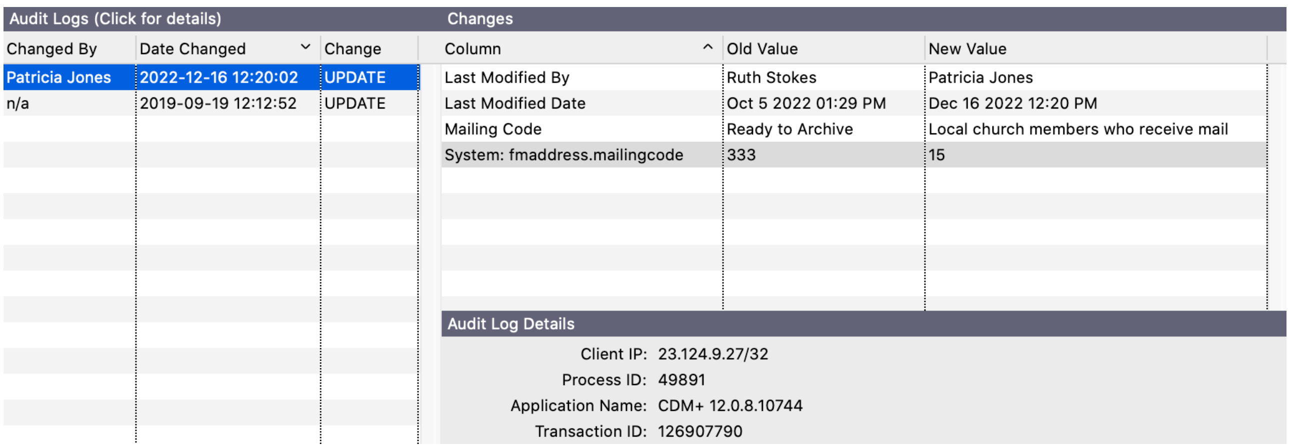
Last Modified By - Who last modified the record

NOTE: Some record frames may not display entered and modified data since they are comprised of multiple records. This includes Contribution Records, Purchase Order Records, Accounts Payable Invoice Records, and Ledger Entry Records.

The Record tab also displays the Audit Logs for the selected record. Audit logs track each change to a record and what was changed. They also track record insertions and deletions.

NOTE: Audit Logging was added in CDM+ 11. Only changes made in that version or later will be displayed in the audit log.

After clicking the Record tab you will first see a list of changes including who and when the change was made. Click a change to see more details.



A list of changed columns will appear displaying an old and new value. CDM+ tracks changes to every piece of data and will attempt to display a friendly name. Note that some internal fields may display their system name.

Below the list of columns you will find more details about the change, including:

Client IP - The IP address of the client program performing this change

Process ID - The backend process ID of the server connection making this change

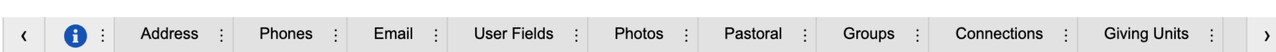
Application Name - The name of the application making this change

Transaction ID - An identifier used to link related changes

NOTE: CDM+ only displays changes made to the primary record. Changes to related records like groups or connections will not be displayed. However the audit logs track these changes and a future update to CDM+ will allow you to view them.

Navigating Tabs

To move between tabs simply click a tab. If there are more tabs visible than can be displayed, left and right arrows will appear on the tab bar.



Click or hold down on these arrows to scroll the tab bar left or right until you see the desired tab. You can also position your cursor over tabs and on macOS, scroll left or right to scroll the tabs. On Windows, hold down the shift key and scroll up and down to move the tabs left or right.

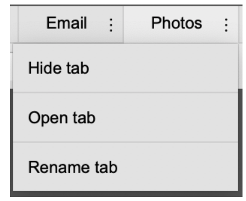
Moving Tabs

Tabs can be re-positioned to put frequently-access tabs next to each other. To move a tab, click and hold on it, then drag the tab to the desired position. This position will be recalled for your user each time you open that record frame window.

You can also re-arrange tabs and restore them to their default order under Configure.

Renaming Tabs

You can rename a tab to give it a more meaningful name. Click the three dots next to a tab and choose Rename tab. Enter the new name when prompted. This custom name will be recalled for your user on this record frame. You can also rename tabs and see their original name under Configure.



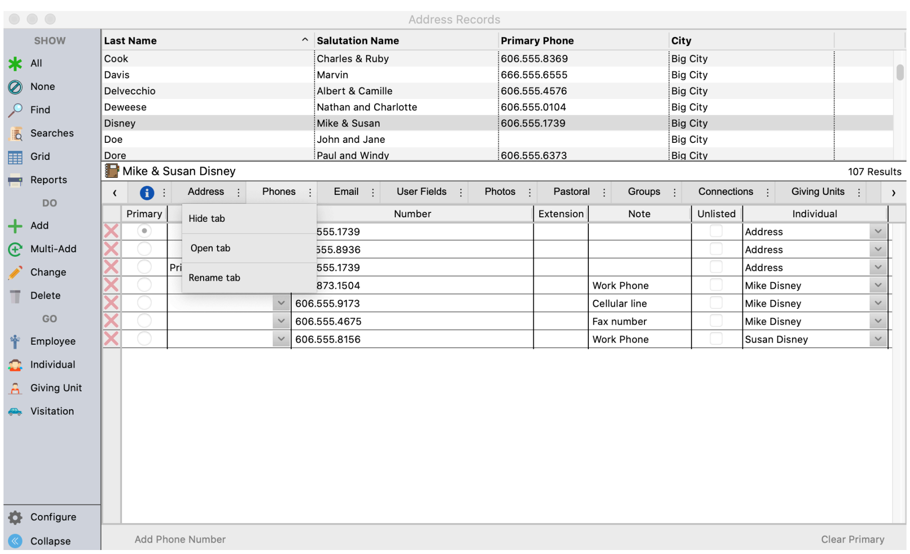
Hiding Tabs

If a tab represents a function of CDM+ that you do not want to use, you can choose to hide that tab to simply the interface. Click the three dots next to a tab and choose Hide tab. That tab will remain hidden for your user on that record frame. You can un-hide tabs under Configure.

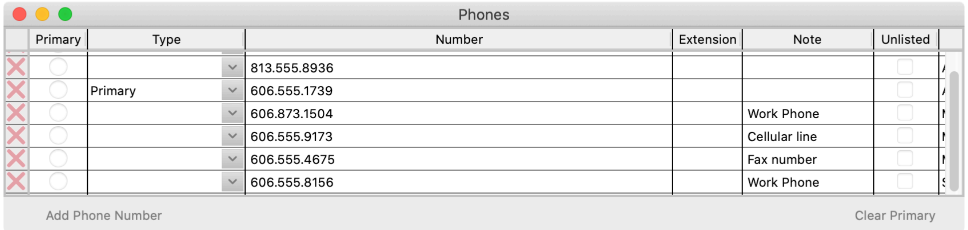
NOTE: Some tabs like the default tab and tabs on Ledger Records cannot be hidden.

Exploded View of Windows

Many windows in CDM+ have additional panes accessed by clicking on tabs. This is a lot of information in a small amount of desktop real estate. However, sometimes you need to be able to see more than one pane at a time. The secondary panes can be separated from the main window by clicking on the three dots next to the desired tab's name.



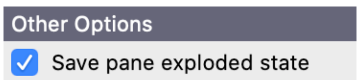
This will open the pane in a separate window.



As you change records in the main data entry window, the exploded windows will change accordingly.

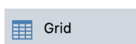
To restore an exploded pane, simply close it.

If you wish this tab to always open in a separate window, click the Configure button  on the record window and check the box to save the exploded state. Otherwise, exploded tabs will automatically return to the main window when closing and re-opening the record frame.



NOTE: The primary tab of a record frame window cannot be exploded.

Grid View



Although most often you will view information in the basic record windows, CDM+ does allow you to view the information in another way. The Grid View displays records in a familiar spreadsheet-like format. This format lets you easily modify multiple records.

The Grid View allows for viewing and changing the results list data in a grid format. This may be a substitute to scrolling the results list when there are a large number of results.

Some data fields may be changed while in the Grid View, making updating your data more simple. A Grid Report may also be printed from the Grid View screen.

NOTE: Contributions, Purchase Orders, Invoices, and Ledger Grids will not allow cells to be edited.

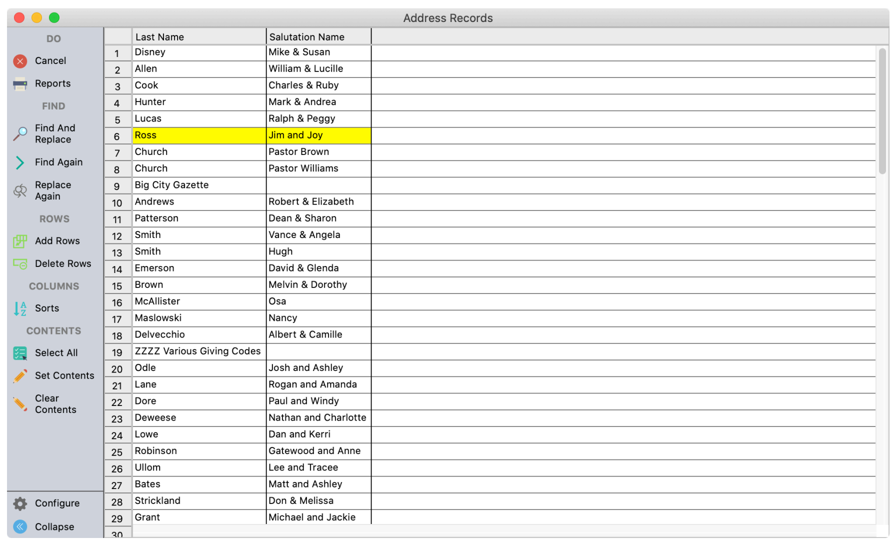
An Address Records grid

Select which columns to view by clicking on Configure. Select the column fields to be changed or added.

Click Print to open the Grid Report window where the report may be re-named, sort criteria selected, and printed.

To work with specific data, you can select all or part of the grid. To select a column, move your cursor to the top of the column until it becomes a down arrow and click. Command-click (macOS) or Control-click (Windows) to select multiple columns.

To select just one row, move your cursor to the left of the row until it becomes a horizontal arrow and click. Command-click (macOS) or Control-click (Windows) to select multiple rows.



To select all the columns and rows, place your cursor in the corner of the box and the top left of the grid. Move it until it turns into a diagonal arrow and click.

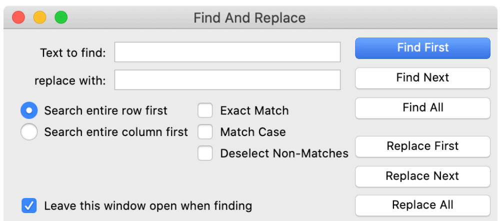
To edit the content of a cell, select it by double-clicking. Once you are in the edit mode, you may use the tab key, shift+tab keys, or arrow keys to navigate the grid.

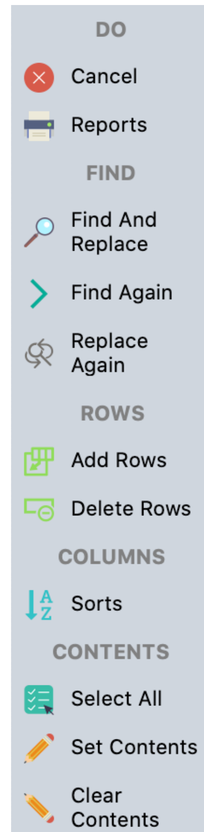
Click Save to save your changes and return to the main window. Click Cancel to discard your changes and return to the main window.

Grid View Sidebar

Tools to manipulate the data in the grid are accessible on the sidebar on the left of the window. The available actions are:

Find and Replace – Select the cells containing the text you want to find or change and click on this icon.





Find Again – Repeats the most recent Find.

Replace Again – Repeats the most recent Find and Replace.

Add Rows – Adds row(s) to the end of the list. (This tool is disabled on the View Payroll grid.) Note: Columns are added or removed using the Choose Columns button.

Delete Rows – Removes the records represented by each row from the database

Swap Lines – Select 2 lines or columns and click on this icon to swap the 2 lines or columns.

Sorts– Select the columns to sort and click on this icon. This opens a Sort Grid window where you may select columns to sort by in either ascending or descending order.

Select All – Selects all cells

Set Contents – Select the cells you wish to change and click on this icon.

Clear Contents – Select the cell(s), column(s), or row(s) you wish to clear and click this icon to delete the content only, not the cell(s). ***USE THIS FUNCTION WITH CAUTION!*** It will permanently clear data from records.

Revert – Undoes all changes to the list since the last Save. This is the same as clicking on the Revert button at the bottom of the window.

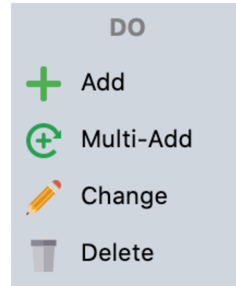
TIP: All the sidebar functions are also accessible from a contextual menu. Control-click (macOS) or right-mouse click (Windows) on the grid to bring up the menu.

Click Save to save your changes and return to the main window. Click Cancel to discard your changes and return to the main window.

Data Entry Function Buttons

To add one or more records or change any information on an existing record, you must first select one of these four buttons at the left of the data entry window.

ADD



To add a new record to your database, click Add. You may now begin entering information in the various data entry fields, tabbing from field to field. When you are finished entering all the required information on the first pane of the main data entry window, move to the next pane by selecting the next tab at the top of the data entry section. When you have finished entering all the necessary data for this record in all the panes of the data entry window, click Save. You have added one record to your database

MULTI-ADD

To add more than one new record at a time, click Multi-Add. You'll notice that your choices at the left of the window are Save and Finish. Enter information as you would for just one record. When you are finished entering data for the first record, click Save or press the Return key on your keyboard. Because you have chosen Multi-Add Mode, the first data entry pane will automatically reappear, ready for you to enter information for the next record. You do not have to click anything except Save between records. When you have input all information for all of the records you are adding and clicked Save after the last record, click Finish to exit Multi-Add Mode.

NOTE: Make sure to click Save after entering the last record! *Clicking Finish does not save the currently displayed record; it simply exits the multi-add mode*.

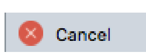
CHANGE

Click Change to change information for an existing record or to add information to an existing record. Do not click Add if the information you wish to add is for a record that already exists (for example, to add phone numbers to an individual, click Change, then click Add Other Phone/E-Mail). The Add button inserts an entirely new record in the database.

DELETE

Use Delete to remove an entire record. CDM+ safeguards you from accidentally deleting the record by forcing you to navigate through several warning screens before the program will actually allow you to delete the record.

CANCEL

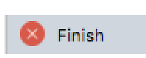


Ends a data entry session without saving the changes you have made.

SAVE

Ends a data entry session by updating the data (Change mode) or adding a new record (Add or Multi-Add modes).

FINISH

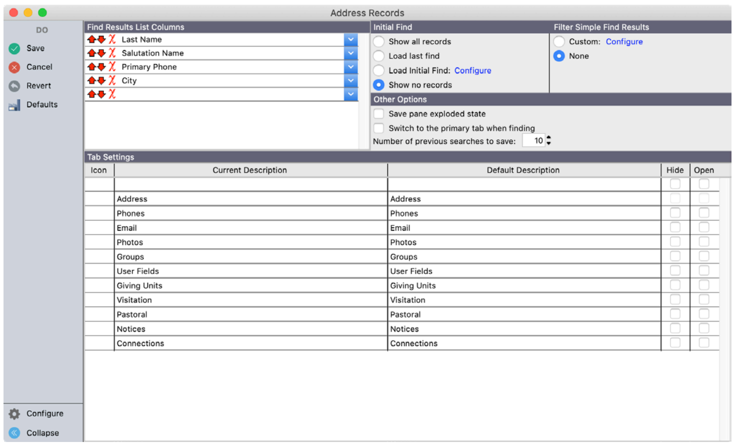


Ends a data entry session in Multi-Add mode.

Configure

Each user of CDM+ can customize the display of find results on data entry windows in CDM+, choosing which fields to include, and what order they display across the window. You can also adjust the order, name, and selections made in Configure will be saved for that particular data entry window for a user until they change them.

To change or add to the columns shown on a record window, click on the **Configure** button.



To select a different column to display, click on the Down Arrow on the right of the drop-down menu and choose the column you wish to include.

Click the red **X** to remove a column field.

Click on the red up or down arrows to change the column order.

Click on Revert on the Configure window to return the view to the original columns. You will be prompted to revert changes to tabs, columns, or all settings. Choose Columns or All to reset your column selection.

When you have finished making your changes, click Save to save them or Cancel to discard them.

NOTE: You can also change the width of the columns. From the main window, move your cursor to the line between headers until it changes to a double line with an arrow on either side. Click and hold the mouse button down and you can make the column wider or narrower.

Use the scroll bar at the bottom of the columned list window to view more columns, if necessary. To have CDM+ automatically size the columns to fit the contents of the results list, move your cursor to a line between columns and when it changes to a double line with an arrow on each side, double-click.

Configure Find Options

Also, you may specify in Configure the Find Options:

1. What you want displayed when this window is opened (Show all records, Load last find or Show no records),
2. Number of previous searches to save for quick access
3. Save pane in exploded state
4. Switch the view of a record window to the primary tab when finding
5. Set the Filter for Simple Find Results

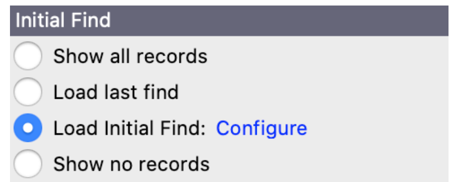
NOTE: These settings are user-specific and tied to the user that is logged in. CDM+ will save your most recent settings when you log out of the program and automatically load them the next time you log in.

Filtering Options for Windows

Filtering can be turned off or set on each window. There are two types of filters: filters that control what shows when a window is first opened and filters that affect Simple Find Results.

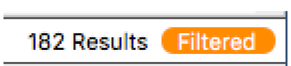
Opening the Window with an Initial Find

Click on the radio button under Initial Find labeled "Load Initial Find:" and click on the Configure button. An Advanced Find window will appear. Define the criteria to limit a select list of results to appear on the window when it is first opened. Make sure you select the OPTION for Initial Find in Configure, and then click the SECOND Configure button.



Filtering Simple Find Results

Some windows will have a default option. For example, the default filter on Individual Records is not to show records where Do not print is checked. A custom filter can also be set up or filtering can be turned off. If a filter is selected and you do a find on that window if there are filtered results then a Filtered button will show next to the number of results that were displayed. Click on the Filtered button to see the results unfiltered.

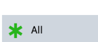


Finding Data on Record Frame Windows

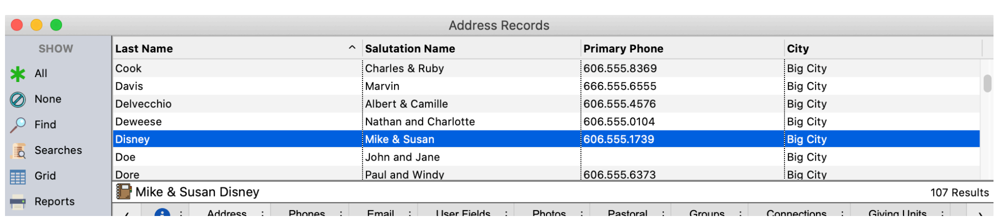
CDM+ has a powerful **Find** feature that allows you to locate and work with the exact information you want. This Find feature is on all CDM+ record frame windows.

After performing a find, the search results display in a results list in the pane just below the definition area. Select a line in the results list to work with that record.

Show All



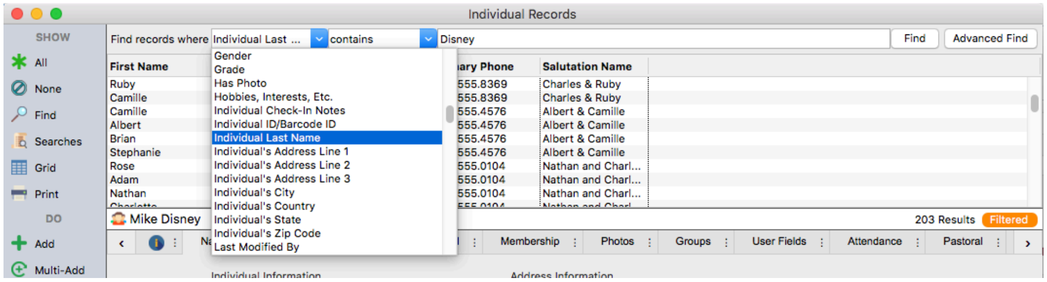
Click on the **Show All** button to display all items in the columned results list.



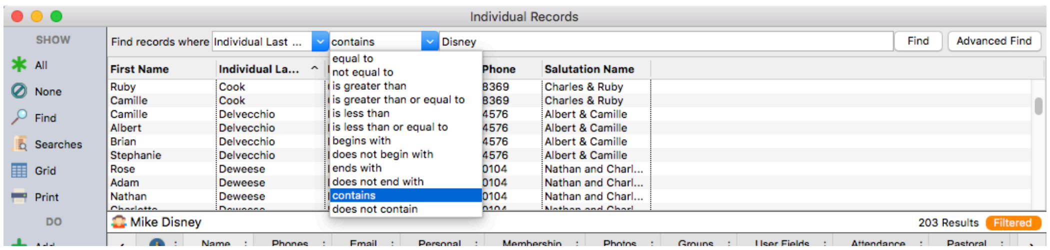
You may sort on a column by clicking on the header bar. Once the column header is selected, click on it to toggle the sort order between ascending and descending. See the Configure section of the manual for more information about setting what columns display in the Find Results List.

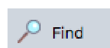
Fields

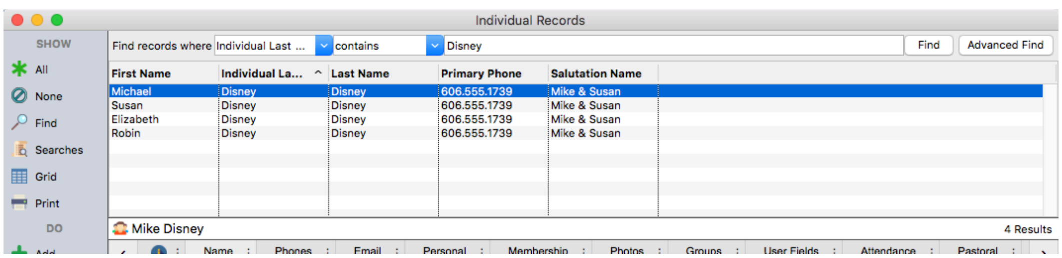
Fields are grouped together for easier selection by headings such as Address, Individual, etc.



Select the modifier from the drop down menu at the center top arrow.



Enter the criteria in the third field and click **Find**  or press **Return/Enter**. The search results appear in the results list below.

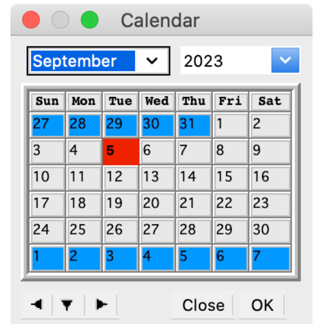


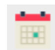
Advanced Find

To perform a more complex search, a powerful Advanced Find is included in CDM+. To learn more about Advanced Finds, take the Advanced Finds class or see the chapter for that class in this manual.

Find Interfaces

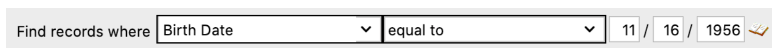
Find interfaces assist in the selection of the criteria; click the interface icons at the end of criteria field for detail.

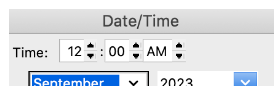


Date fields include a desk calendar icon  to allow date selection via the mouse. Click the icon to open a calendar pop-up window. Date fields will default to the current date/time.

Date/Time - you may optionally choose to include Time on the date field by checking the include Time box next to the Date/Time icon.

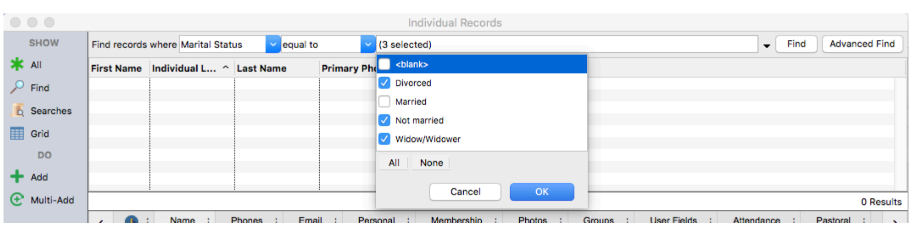
Partial Date fields – Individual Records offer a number of partial date fields, including Birth Date, Married Date, Baptism Date, etc. These fields allow you to track the month and day of an individual's birth date, but not the year.



Time – a time find interface simplifies finding a time. 

Up and down arrows for hour, minute, and AM/PM allow you to select the time via the mouse, or you can enter simply type in the time.

List – Perhaps the most useful and time-saving find interface is the list interface. The list interface appears for many types of fields, including built-in codes (such as Family Status, Mailing Code or Ledger Entry Type), user-defined groups, and a variety of other fields in CDM+, such as giving funds in Contributions. When you select a field that uses this list interface, a small down arrow appears next to the entry field. Click the arrow to display the list. Click the box or boxes of the items you wish to include and click OK. To find records that have nothing entered in the field, click the checkbox for <blank>.



Searches stored in the Previous Searches list are accessed by clicking on the Searches icon.