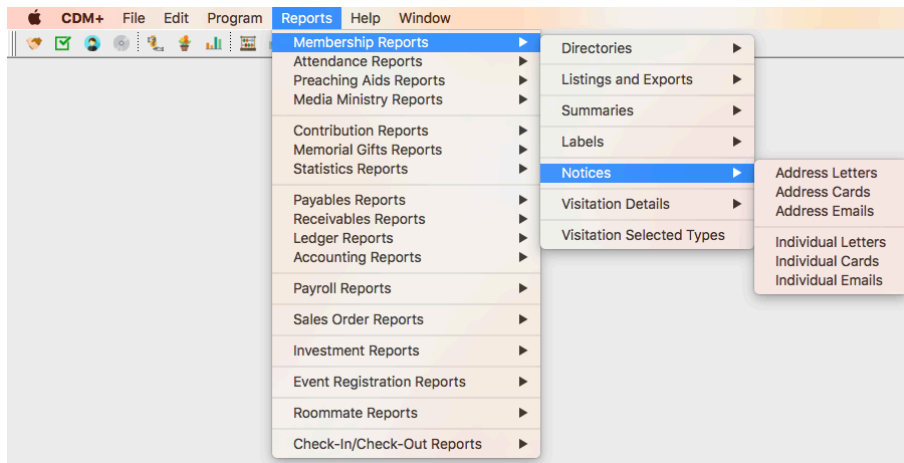


CDM+ Reports

CDM+ allows you to generate a variety of reports in a number of different formats. All reports are highly customizable by search criteria, information included, and fonts and colors used. Each report setup window will allow you to see a preview of the report before you send it to the printer.

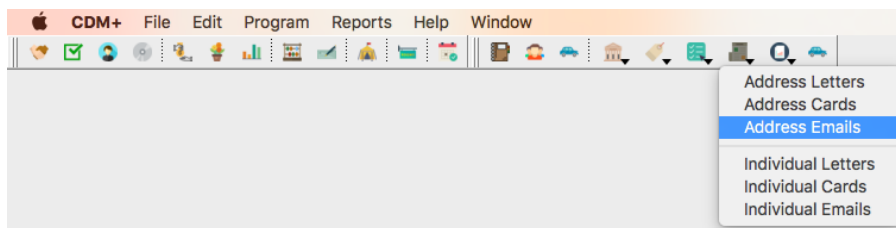
Accessing Reports

All reports may be accessed from the Reports Menu. Note that some menus will have sub-menus.



Accessing Reports from the Toolbar

Reports are accessible from the Toolbar if you have specified in Toolbars section of the Preferences window to display the relevant program toolbar(s).



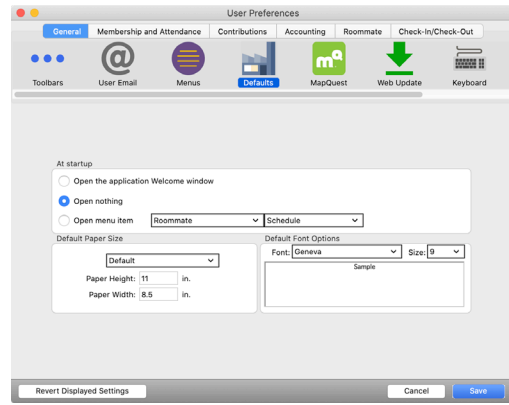
Accessing Reports from the Reports pane of the Welcome to [Program] window

The Welcome to... window for any program can be opened by selecting it from the program menu.

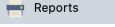
Or, if you work exclusively in one program, you may wish to set your User Preferences Defaults to open that window at startup (as shown opposite):



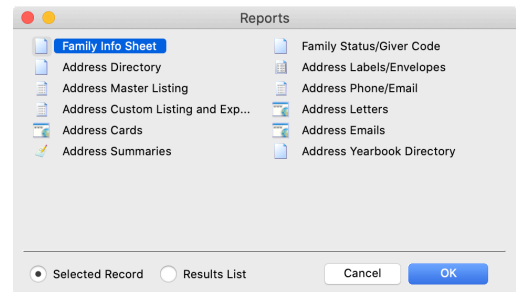
Set your User Preferences General Defaults to open a Welcome to [Program] window at startup:



Print Reports from Find Results

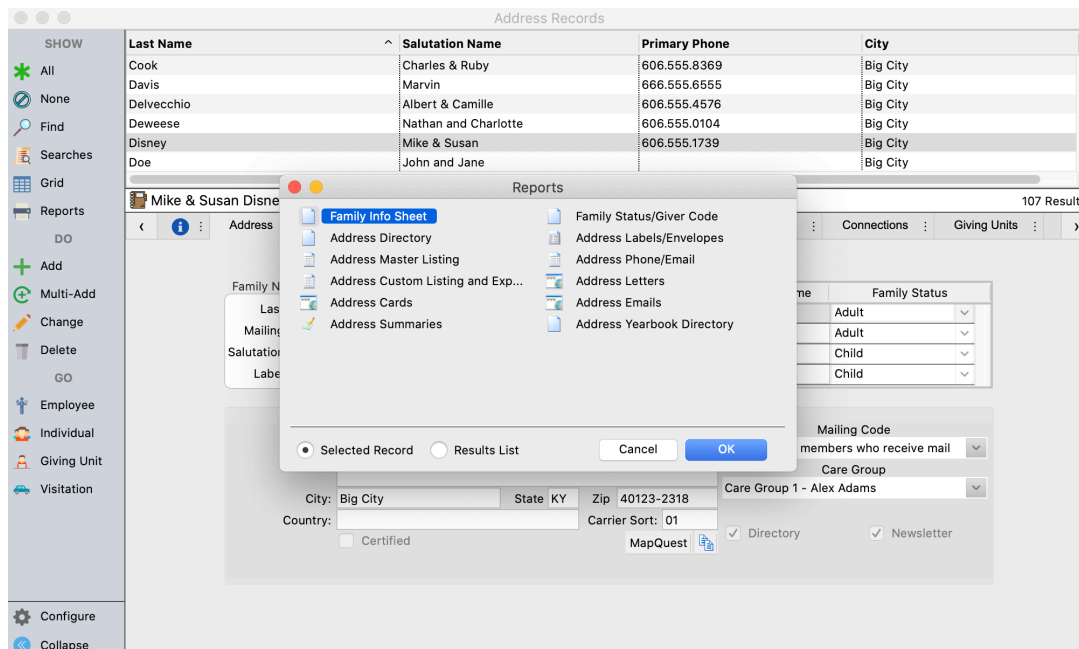
Clicking on the Reports button  on the left of a record window will bring up a list of available report options. Click to highlight the report you wish to print. By clicking the appropriate radio button (Results List or Selected Record), you can choose to print:

- the entire results list
- a selected record (highlighted)
- multiple selected records (highlighted).



Print Selected Records from Find Results

Multiple records may be selected (highlighted) by holding down the Control or Command key while clicking on the desired records. Click OK and the Report Setup window will open. Note that the search description will state that results from the record window will be used to produce the report.

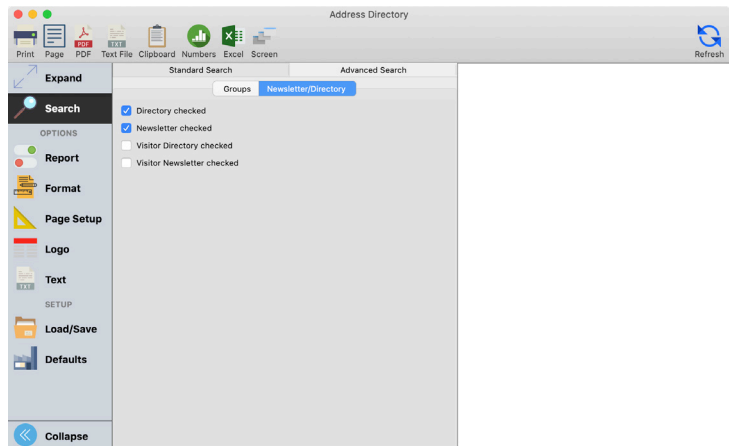


You can also quickly print the results list by right-clicking it and choosing Print.

Report Setup Window

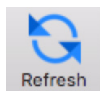
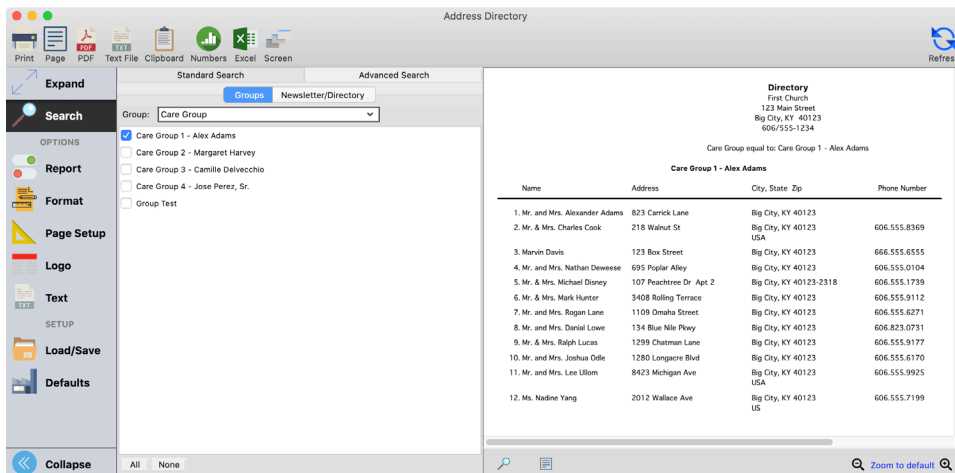
Report setup windows in CDM+ share a common interface from program to program in your suite. This means the user sees the same format on all report setup windows, making CDM+ easier to use. Report settings are user-specific. Once you have printed a report, CDM+ will remember your settings for that report for the next time.

There are three main areas in a report setup window: the **Search**, **Options**, and **Setup**. These areas are available on nearly all report setup windows in CDM+, and are listed on the left sidebar of the window. Depending on what report you are trying to run, the number of options may vary under these headers.



Report Preview

All CDM+ reports also have a preview that lets you review your report before printing to screen, saving to a PDF, or sending to a spreadsheet program.



Click the blue circular arrow, the Refresh icon, in the top right corner of report setup windows to refresh the Report Preview section. To see more of the preview, enlarge the window or use the scroll bars. To see a revised preview after making a change, click the Refresh icon or press Command-R (macOS) or Control-R (Windows). You can also use the Preview to refine reports before printing.

Search Within the Report Preview

Click the magnifying glass icon below the preview pane to open a search box. Results of your search will be highlighted in the report preview.

73. Allie Thompson	907 Veterans Way	Big City, MO
74. April Thompson	907 Veterans Way	Big City, MO
75. Angela Ullom	8423 Michigan Ave	Big City, MO USA
76. Tracee Ullom	8423 Michigan Ave	Big City, MO USA
77. Sonya Wang	662 Bryan Ave	Big City, MO USA

Produced on Aug 29 2017 at 6:06 PM by Dana

Preview Page Thumbnails

Click the page icon below the preview to open a pane of page thumbnails.

Click on a thumbnail to jump to that page.

Click the black magnifiers to zoom in.

The screenshot shows a report preview window. On the left, there is a list of names and addresses, similar to the table in the first image. On the right, there is a sidebar with a list of page thumbnails numbered 1 through 20. At the top of the sidebar, there is a search box with a magnifying glass icon. The report preview window also has a magnifying glass icon at the bottom center.

Search Button

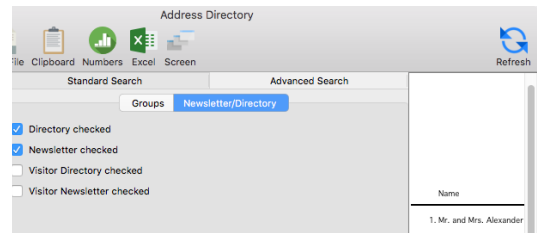
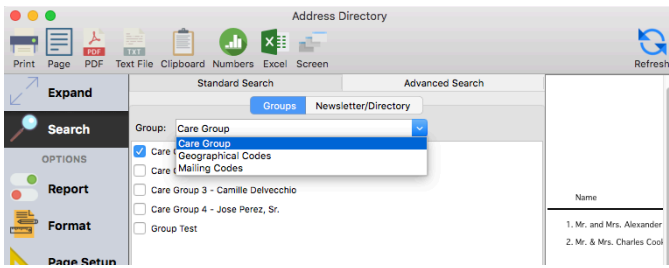
Within each area of the window are several other common features. In the Search area, many reports offer Standard and Advanced Search options accessible by clicking the tabs at the top of the window.

If a report setup window is opened by performing a search on a Record window, and then clicking on Print, the report will reflect the results of the search criteria you entered on the Record window.

Standard Search

The options under the Standard Search will vary from report to report. Some reports have sub-tabs to access other panes. However, reports that are accessing the same record type will have identical or nearly identical Standard Search options.

For example, two reports that include information from Address Records will both have a **Groups** tab with a drop list to select a group and checkboxes to select codes within that group.



In addition, both will have a Newsletter/Directory tab where you make selections based on the Newsletter and/or Directory check boxes on the Address Records and Visitors Records windows.

Advanced Search

The Advanced Search option on the Report Setup windows in CDM+ allows you to further fine-tune your report contents.

Click on the Configure Advanced Search button to open the Advanced Find window. This window is the same as the Advanced Find window accessed by clicking on the Advanced Find button on data entry windows. Because of all the options inherent in Advanced Searches, this is covered in a separate class, Advanced Finds, summarized elsewhere in this manual.

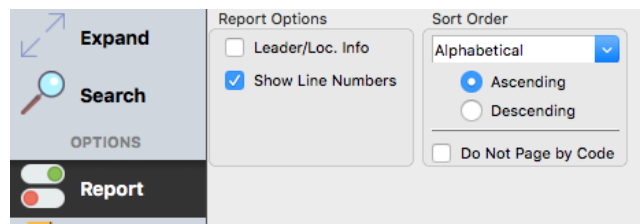
Options Buttons

The items under Options on the left sidebar of most CDM+ report setup windows allow you to further customize the content and the appearance of a report. The Options will vary depending on the report type you have chosen and the program—such as Membership or Accounting—you are currently using.

When setting up a report in CDM+, be sure to review all of the options available and make the appropriate choices in each one. Most reports do have the following options: Report, Format, and Page Setup. Other reports – such as Custom Listings, Exports, and Labels/Envelopes reports – have specialized options.

Report Options

The Report option is where you make additional choices specific to the report you are creating. Options under Report will vary greatly from report to report. Options for sorting the report are located here.



Format Option

The Format option, found on most CDM+ report setup windows, varies according to the report. In general, it allows you to precisely specify how information appears on the report. As noted above, the content of a report is primarily controlled by what is specified under Search on the report setup window, but the Format tab controls how that content is displayed.

For example, the Format Options pane on the Address Directory report setup window (shown below) lets you specify Individual Name and Address (Family) Names, which (if any) address to print, how to treat Unlisted Phone Numbers, and provides an option to include Other Phone Numbers or Email Addresses on the report.

In addition to specifying content of a report, Format Options also allows you to customize the appearance of a report. Here you can select:

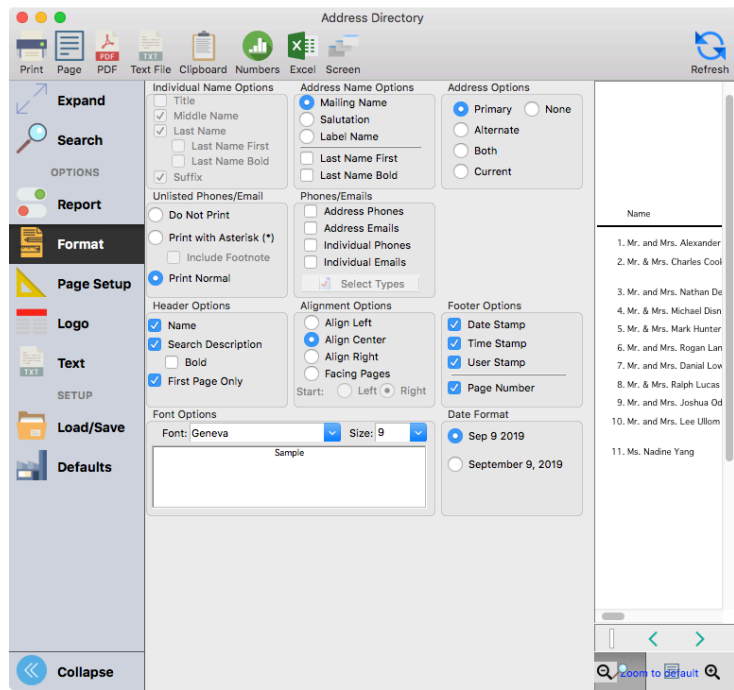
Header Options: The checkboxes in the Header Options section allow you to specify whether or not to print the Church Info and Search Description at the top of a report. The information you choose will appear on all pages unless you select First Page Only.

Alignment Options: Here, you can select the alignment of text on a report – left, center or right. Also, you can choose Facing Pages. The Facing Pages option is ideal if you are going to print a multi-page report on both sides of the paper and 3-hole punch it for placement in a ring binder.

Footer Options: The checkboxes in the Footer Options section allow you to specify the information you wish to have printed at the bottom of a report.

Font Options: In this section of the General tab, you can select from droplists the font and its point size to be used on the report. CDM+ shows you a preview of your font selection in the box.

Date Format: In this section of the General tab, you can select the date format you wish to use on the report.

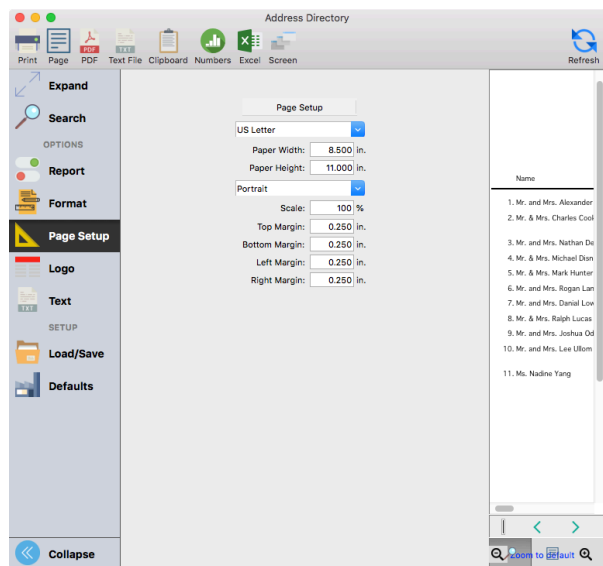


Page Setup

Page Setup provides much flexibility when printing a report. Here you can specify the paper size, orientation, and margins.

1. Either select one of the standard paper sizes from the droplist or enter the dimensions for a custom paper size.
2. Select the orientation of the paper. Some reports are better suited to a wider Landscape orientation.
3. If desired, change the scale at which the report prints.
4. Enter the desired margins for this report.

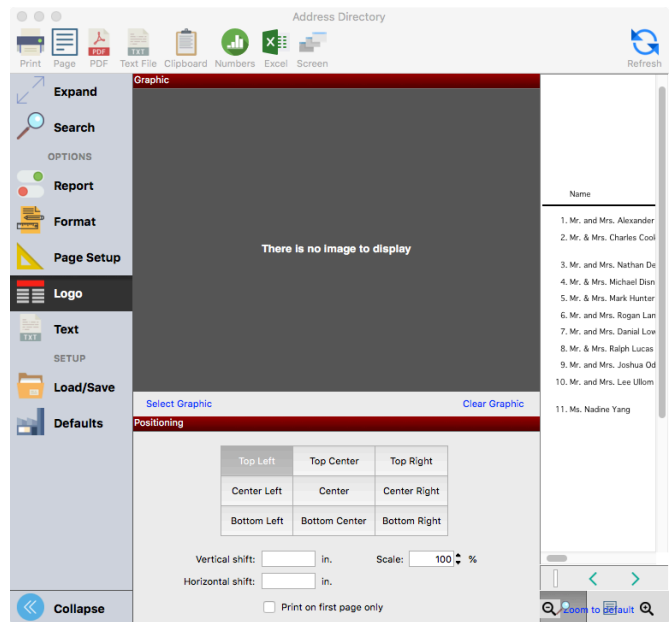
NOTE: Clicking on the Page Setup button on this pane will open your computer's standard page/print setup window. This is an alternative to making your paper size selections here.



Logo

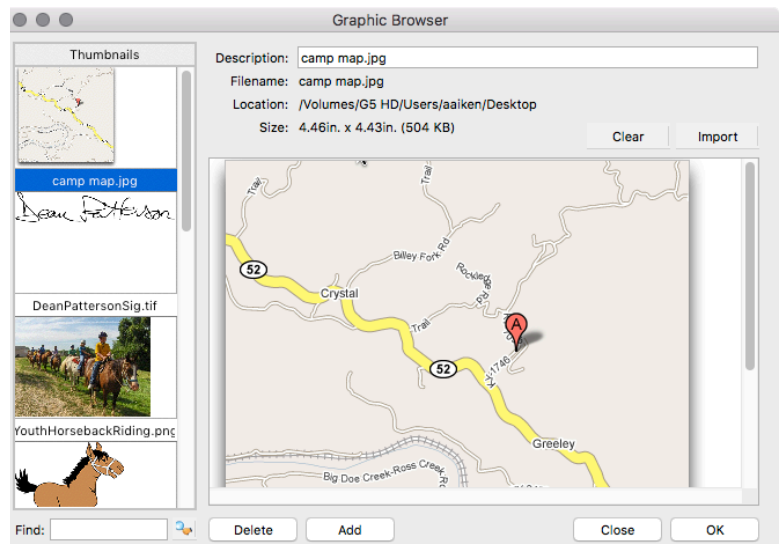
Select the Logo tab on the report Options menu to place graphics on most reports in CDM+.

The Logo tab accesses graphic files added to your CDM+ database in Graphic File Browser. To choose a graphic to include on your report, click Select Graphic below the graphic preview pane.

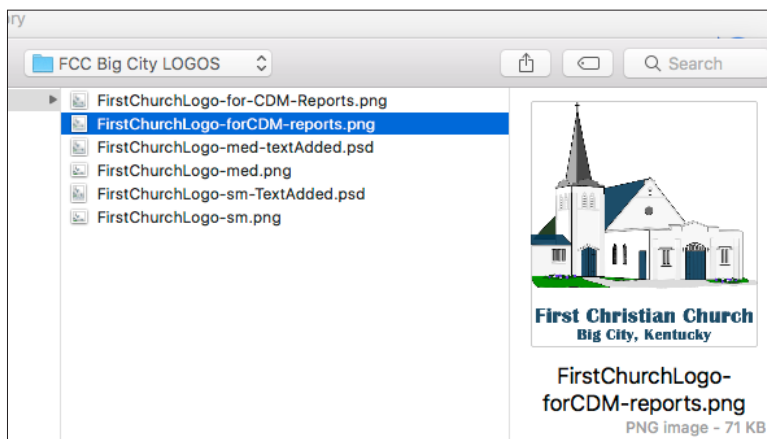


This action will launch the Graphic Browser. You will see thumbnails of the images already in your CDM+ database .

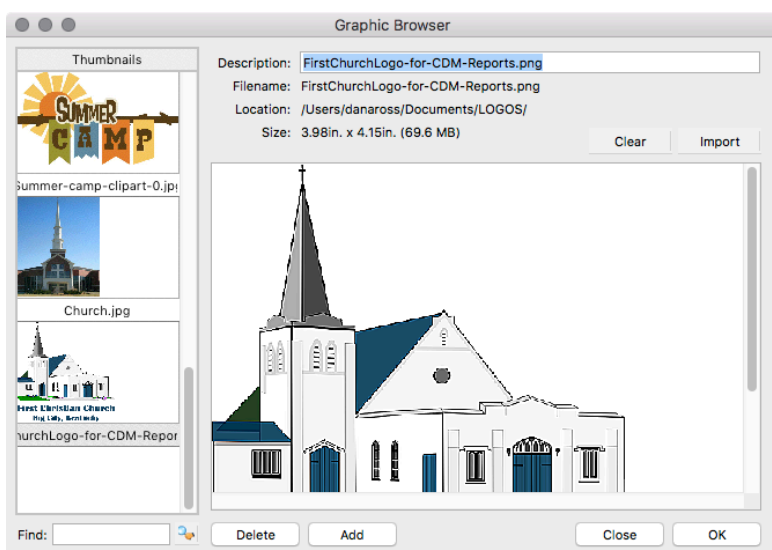
If the image you wish to place on your report is not already in the CDM+ Graphic Browser, click Add.



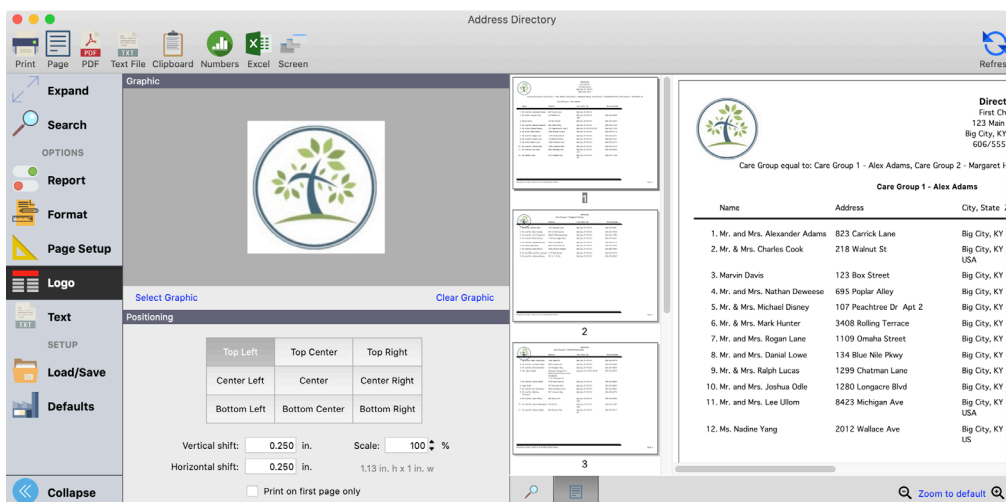
On your computer, locate the file you wish to add to the CDM+ Graphic Browser, click on the file name, and click Open. This action will import the selected file to your CDM+ database.



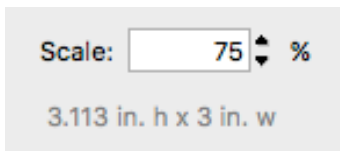
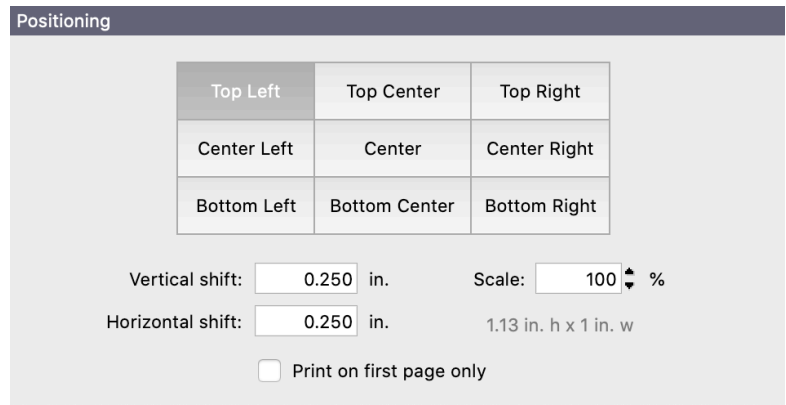
You should now see a thumbnail for the graphic you imported. Select (click on) the thumbnail and click OK.



You will now see the selected graphic, positioning controls, and, if you click Refresh, you will see the graphic on your report preview window.



Use the positioning controls to fine-tune your selections. Adjust the size using Scale. If the image is too large, scale it to less than 100%. If it is too small, scale it to more than 100%. Enter the percentage and hit the tab to see the new dimensions for your selection below the Scale percentage, or use the up/down arrows to the right of the percentage.



You can also use the Positioning palette to place the image on a specific area of the page. Select an area of the page, such as Top Left, and use Vertical Shift and Horizontal Shift to adjust the placement of the image within that area.

Again, use the Refresh option to preview the effects of your changes. It may be necessary to return to the Page Setup option to adjust where the contents of the report appear in relation to the report header and Logo graphic.

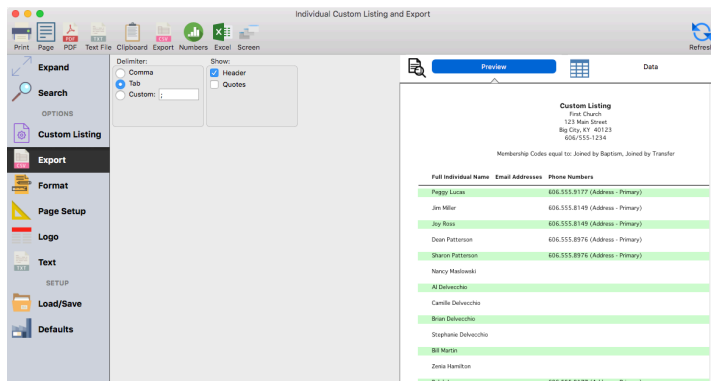
Columns

Custom Listing and Export reports let you choose one or more columns to print or export. These columns are organized into sets.

Select which field(s) of information to include in the export by choosing a Set from the drop list. To modify a set, select the appropriate Set, then select the arrow next to the set, and Modify Custom Listing Sets will open in a new window. Under Available Fields, select the fields that you would like to include, and double click the field to add it to the Fields in Set. If no sets appear in the list, you will need to create one by selecting the "+" sign and create a new set.

If you click on Refresh for an Export report, you will see the first record in the preview area. Scroll over to see all the fields. To view other records in the list in the Preview pane, click on the right and left arrows at the bottom.

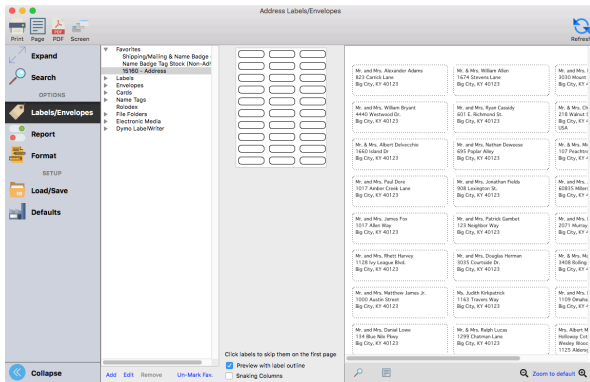
An Individual Export, with Preview:



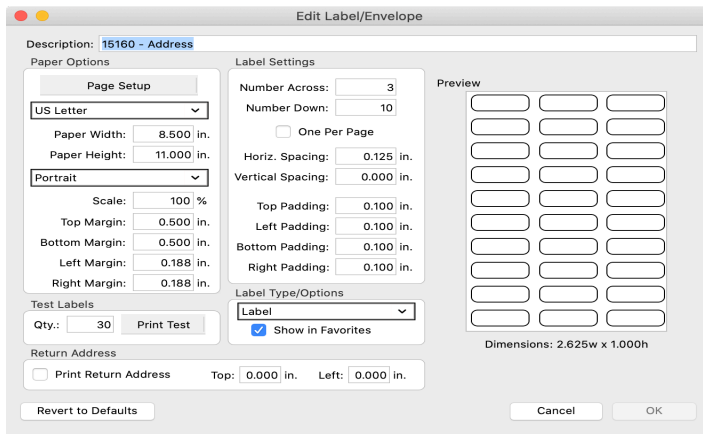
Click Export in the top left to complete the export. When prompted, enter a name and location to save your exported file.

Labels/Envelopes

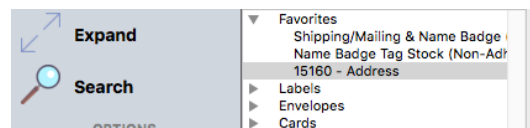
Labels/Envelopes reports have an additional icon under Options where you can select from pre-defined label formats, including every label sold by Avery®. Click on a numbered label format in the list on the left and you'll see a graphical representative of it on the right.



You can edit this list of label and envelope formats. Click on either the small Add or Edit button below the list to open a window where you can add your own custom label format or edit an existing one.



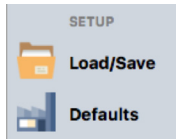
Highlight a label or envelope format and click the Mark Favorite button to move it to the top of the list under Favorites.



A useful feature in printing sheets of labels from CDM+ is the ability to mark individual labels on the page you want to skip. In that way, you can easily use a sheet of labels that may be missing one or two labels. Just click on the location(s) of the missing label(s) to highlight them on the graphic.

NOTE: The skip labels function only applies to the first page of a report.

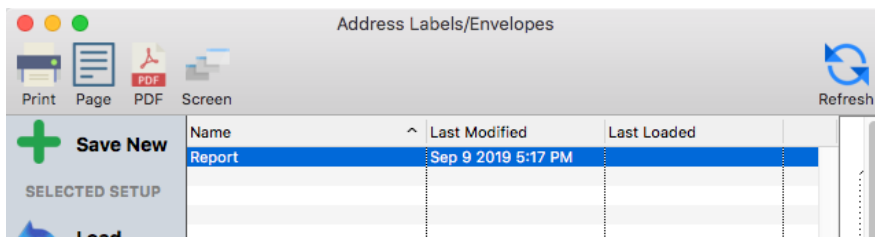
Report Setup Buttons



Load/Save

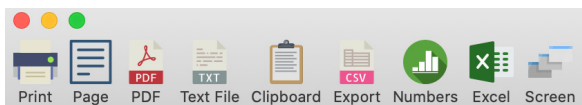
If your office is like most, you tend to need the same reports over and over. With the **Load/Save** report feature, you can now save the search criteria for an oft-repeated report, along with its formatting and other options.

If you have previously set up the report you need, simply click the Load/Save icon, highlight the report in the list, and click Load.



If you have not yet created the report you need, you may set up the search and formatting options for the report first, then click Load/Save Report when you're ready to save and name the report. Or, you may click Load/Save Report before creating the report and use the Load Defaults feature as a starting point for your new report. There is a Saved Reports Window for each type of report, and you're likely to return to them often. The Saved Reports Windows are also where you find options to Replace, Rename, or Delete previously saved reports.

Outputting Your Report



You have access to several report output options directly from the Report Setup/Preview window.

Printer: To send your report to a printer, select Print on the Select Report Destination window and click OK. You will then see your computer's print dialog box. Make necessary setup adjustments and print the report.

Page – Click to send only the page showing in the Preview screen to the printer.

PDF: To save the report as a PDF file, select PDF on the Select Report Destination window and click OK. Give the file a name, such as FCC Directory, browse to select the desired location, and click Save. A PDF file preserves all your formatting of the report, including fonts, regardless of whether the computer it is opened on has that font file or not. This makes the PDF report option ideal for distributing reports via email to board or committee members.

Text File: To save the report to a plain text file (.txt) that can be opened by any program that can read a tab-delimited format (such as a word processor or spreadsheet), select Text File on the Select Report Destination window and click OK. Give the file a name, browse to select the desired location, and click Save. This option preserves the original columns and spacing.

Clipboard: To save the entire report to the clipboard for copying and pasting directly into a document, select Clipboard and click OK. After copying the report or a portion of the report, switch to the destination program and paste.

Numbers: On a macOS computer, reports that support a text output can be sent to Numbers, if installed. Click the Numbers icon and the text version of the report will be opened in Numbers.

Excel: Many reports can be sent directly to Microsoft Excel®. If CDM+ detects that Excel is installed on your computer and the report supports a text output, an Excel icon will appear. Click Excel to open the text version of the report in Excel.

Screen: If you wish to only copy a portion of the report to your Clipboard, first send it to the Screen. Then drag your mouse to select the area of the report you wish to copy and click the Clipboard icon. After copying the report or portion of the report, switch to the destination program and paste. This option also produces a tab-delimited format that preserves original columns and spacing.