850 - HOW TO… REPORTS – Document Style

How to Create a Report – Document Style – Chose the Reports Application (from the left panel) to create a Report. A Word document (letter, form, certificate, etc.) can be created so that you can run it in thru the database and populate the fields mapped in the document with data from the database.

- Step 1 – SETTING UP THE DOCUMENT
  - A. Create your letter, form, or certificate in Word and leave space for the fields you want to insert from the database.
  - B. In order to map the database fields into the document, you must have the Insert a Field Tab as an option in Word (Top left line along with the Save, Back Arrow, Refresh Arrow, etc.). It will look like a black rectangle surrounded by brackets [ ]. Once it is stored in your version of Word, it will appear every time you open Word.
  - C. To add the "Insert a Field" icon to your screen:
    1. Click INSERT
    2. Click "Quick Parts"
    3. Click "Insert a Field" to add this option to your screen

- Step 2 – MAPPING THE DATABASE FIELDS INTO YOUR DOCUMENT

  Mapping the database fields into your document can seem like a tedious process, but once you get the rhythm of it, it flows quite well.

  - A. Selecting a Report Type is the first and trickiest step in mapping database field you're your document. The Report Type will determine which fields you are able to put in your document. Also a document is stored under a specific Report Type.
  - B. Determine which Report Type you would use if you were creating a Spreadsheet Style Report. Choose this Report Type for your document. You don't have to set up anything else on the Query screen. You are now ready to Toggle between the database and your Word document.
  - C. Click the Fields Tab.
  - D. Highlight the field you want to merge into your Document.
  - E. Right Click and then Click "Copy."
  - F. Now go to your Word Document and place your cursor where the field should be mapped.
  - G. Click on the "Insert a Field" icon at the top left of you screen (in Word). You can't paste field yet.
  - H. In Categories, select Mail Merge
  - I. In Field Names, select MergeField

J. Under Field properties, click in the Field Name box
K. Now you can Right Click and then Paste field. It will show up in your document as a merge field.
L. Click OK.
M. Go back to the database and choose your next field to merge into your document.
N. After you have mapped all of your desired fields, Save your document in Word.

- Step 3 – MAPPING FIELDS THAT START WITH DETAILS> COUNT> TOTALS> SUM> etc.
  A. If you are mapping a field which begins with the following words above (and in all caps), the capitalized part of the field must be removed before it is mapped into your document. This changes how Step K above must performed – editing the field name as follows:
     1. After the field name is pasted into the Field Name box (Step K above), you must edit the field name to remove the extra capitalized section at the beginning.
     2. For example, the field name DETAILS>Activity. In the FIELDS listing, it will show up as DETAILS.Activity. Once you map this field into your Document (complete Step K), edit the field name to only be Activity before you Click OK.
     3. These fields are only found in certain report types when more than one layer of the database is being accessed.

- Step 4 – UPLOADING THE DOCUMENT INTO THE DATABASE
  A. While in the Query Tab, make sure you are under the Report Type you mapped your document with.
  B. Click the Documents Tab
  C. Click Add New Document
  D. Click on which Type of a document it is
  E. Give the document a Name
  F. Choose an Access Level. Choose either “Everyone” or “Everyone – Read Only”
  G. Click UPLOAD FILE and select the document file from wherever you have it stored.
  H. Click SAVE

How to Update a Document stored in the Database

- Step 1 – SELECT THE REPORT TYPE under which you stored the document. This is the only way to find the document.

- Step 2 - Click the Documents Tab. Locate your document in the list of documents.

- Step 3 - There are 3 things you can do with a document from this screen.
  A. Edit the document

B. Download the document
C. Run the report to create your document populated with the merged fields
D. Click on the Download the Document icon (Down Arrow).
E. This will place the current document in the database into your Downloads. You always want to start any update by Downloading what is currently in there to insure that you can always go back to the last working copy of your document if need be.
F. Save the downloaded file elsewhere on your computer, so you can update it.
G. Update your document. If you need to map more fields, go back to Step 2 above and map those fields.

- Step 4 – Upload the updated document into the database.
  A. Click on the Edit icon (Pencil). The Document Type and Name are already populated.
  B. Click UPLOAD FILE and select the document file from wherever you have it stored.
  C. Click SAVE
  D. This way your original document Is overwritten instead of storing multiple versions of the same document.
  E. You can change the document Type and/or the Name before you hit save if you want to change what you called it or because of a misspelling, etc.

How to Run a Document Report

There are 2 ways to run a Document Report.

- One way is to Create a Query where you set up Criteria to decide which records are pulled to create the report documents. In this case, you will create a Document Report for each Household or Member that meets the Criteria of the Query.

- The other way is to Run the Report Document from the Household's or Member's record. Here you will only create 1 Document Report – the one for that Household or Member. This can only be done when dealing with data that does not have repeated occurrences.

- For example, you can run a Document Report from a Household's record or from a Query to create a Welcome Letter, but you can't run a Document Report to list all of a Household's contributions. With the contributions, there is a series of records for the Household, not just one occurrence.

How to Run a Document Report with a Query

- Step 1 – Choose the same Report Type that the document is stored under.

- Step 2 – Follow all of the steps to Create a Report – Spreadsheet Style (including Saving the Query) except you can skip Step 3 – SELECTING FIELDS TO APPEAR IN THE REPORT because you have already mapped the fields you need in the document.
- Step 3 – However, you can decide to select fields from the list of fields so you can Preview the query results before creating the Report Documents. This may be an easier way to test out the Criteria you have set up to insure that you are getting the data you really want.
- Step 4 – Click on the Documents Tab
- Step 5 – Find the document you want to produce
- Step 6 – Click the Generate Documents icon (Right Arrow in a Circle). This will generate your Report Documents and will store them in a file in your Downloads.
- Step 7 – Open the Report Document in Word to review and edit the document (if necessary) before printing the document.

How to Run a Document Report from a Household’s or Member’s Record

- Step 1 – Pull up the Household’s record.
- Step 2 – Pull up the Member’s record, if you want to print a report document at the Member level. Otherwise, stay on the Household’s record.
- Step 3 – Click on Letters (this should really be named Documents).
- Step 4 – Select the Report Document you want to produce.
- Step 5 – Click the Generate Documents icon (Right Arrow in a Circle). This will generate your Report Document for that Household or Member and will store it in a file in your Downloads.
- Step 6 – Open the Report Document in Word to review and edit the document (if necessary) before printing the document.