RDS Advantage
Tutorial

ReportRight© Report Writer

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REPORTRIGHT!

Before We Begin Writing Reports

Each of the following tasks will be covered in the assignments and instructions in the tutorial:

- List all information which the report will need to contain.
- Decide where in the system (i.e., Member Records, Activity Records) that each field of information will be found.
- Decide what system will allow you to access all of the files needed for the required information.
- Will a merge eliminate the need for choosing many different files? If so, which merge will be the one needed?

Getting Started

How to Design Your Report

Remember to keep the report as simple as possible.

- Determine who will be using the report and for what purpose.



- Develop the criteria before you start setting up your report.
  Write down exactly the fields of information requested for the report.

- Determine if the information needed should be general or specific, i.e., Financial information may need to be summarized, as well as, more sensitive member information.

- Determine if a merge is needed and which merge will be selected. Four systems provide merge capabilities: Member Records, Activity Records, Financial Records and Payroll.

Think of RDS as a file cabinet in your office. The entire cabinet would contain all of the files and fields of information available.

Within this file cabinet think of the following:

File Cabinet	One Drawer in Cabinet	Specific Information in the Folder
↓	↓	↓
Directory	File Folder	Fields

From RDS (the Directory), Files containing the fields of information must be selected. Within each of the selected Files, the user will select only the fields of information previously determined as needed for the report.

Become familiar with the fields in each of the files. For example:

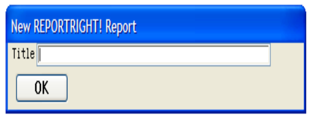
In **MRIND** file you will find all of the fields which you entered in Member Records Individual windows 1 and 2, such as, Title, First Name, Middle Initial, Last Name, birthday, gender and more.
In **ACIND** you find all of the fields which you entered when enrolling an individual into an activity and more.

A Quick Method For Learning Files

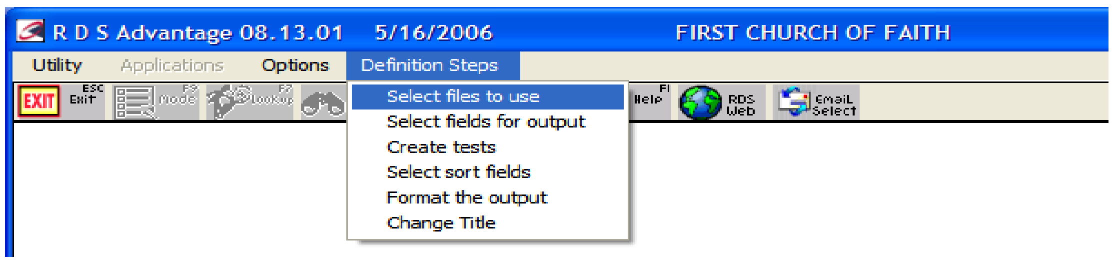
A quick method for learning these files and what fields are in each is to select an existing report in the duplicate mode.

1. Select ***ReportRight***.
2. Select from the ***Options Menu, Duplicate Output Definition***.
3. From the pop up menu scroll down and select ****MR: Family Report.***

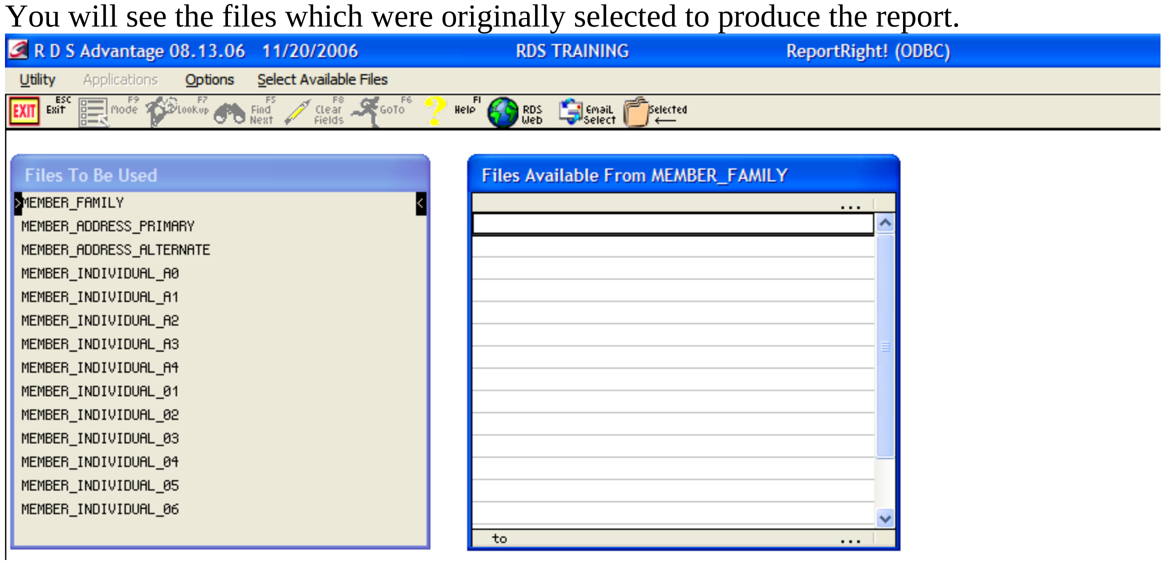
4. In the ***Title*** box rename the report to **MR: New Family Report.** (MR: places the report with other reports which are classified as Member Records reports.)



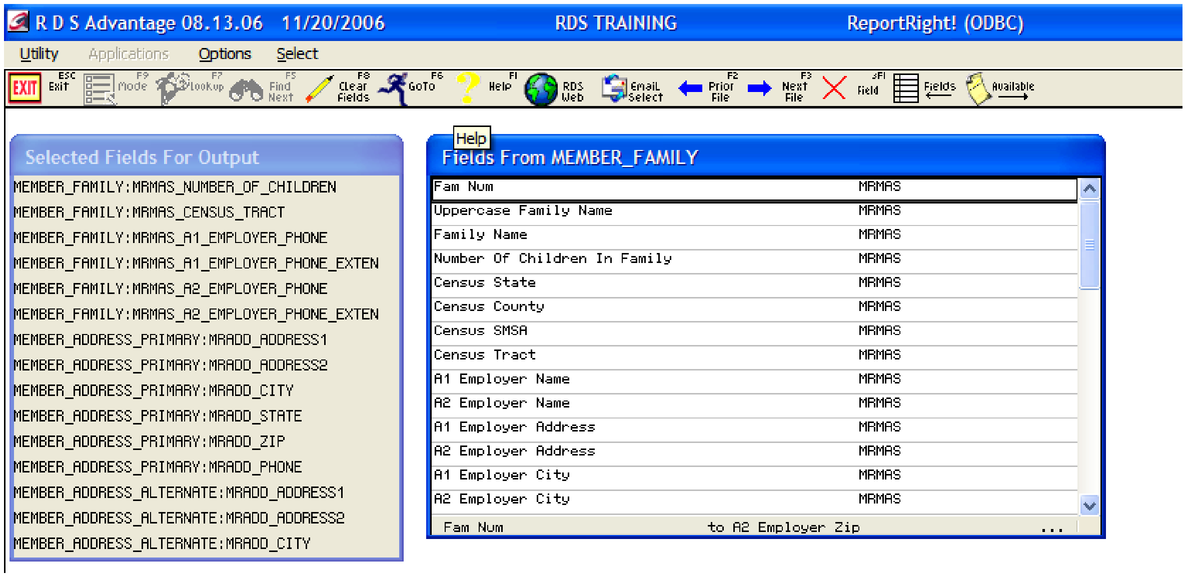
5. Click on ***OK*** to enter the report.
6. Move to the ***Definition Steps***.
7. Choose Select ***files to use***.



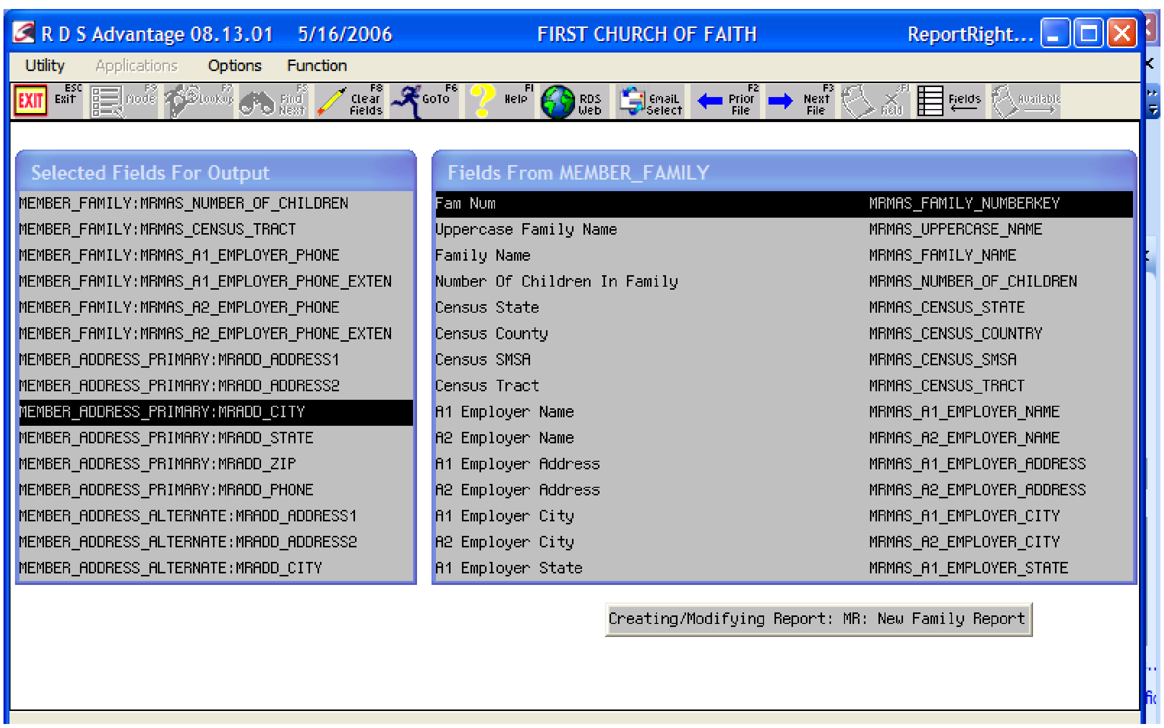
You will see the files which were originally selected to produce the report.



8. ***Exit*** one time.
9. Select the ***Definition Steps***.
10. Choose ***Select fields for output***.



You can see on the right hand side of the window the field names which are contained in this file. ***Using the Page Down Key*** will take you into other fields. ***Page Up key*** will return you to the previous page.
Click on → ***Next File Icon*** or → ***Prior File Icon*** to see the fields contained in other files.



The fields on the left side of the window show you which fields were selected for this report.

If you want to move to the next file use the → ***Next File icon*** at the top of the window.

Any of the fields may be removed by selecting the ***Remove Field icon*** or ***Shift F1***, if the field has not been formatted into a report. If it has been formatted into the report you must first delete the field from the formatted report, by selecting the ***Definition Step, Format the Output*** and removing the field. The field may then be removed in the ***Select Fields for Output*** option.

When you exit the report, you will answer the question, "**Do you wish to save the definition? Y or N**."
If you have made changes to the original report and want to save it, answer Y, if not answer N.

Any existing report may be duplicated and/or modified to add fields or delete fields. Reports which have been created and stored in the system by RDS can only be duplicated in order to add or delete information in the report.

Exercise: Using the report – MR: New Family Report

1. Select from the ***Options*** Menu, ***Modify Output Definition***.
2. Select form the ***Definition Step*** option***, Select Fields for Output.***
3. Select the icon at the top of the window which says**, Fields.**
4. Using the **Up Arrow key** move to the top of the window on the left, placing the cursor on ***Number of Children***
5. Select the icon***, Available Fields.***
6. Select the third item down***, Family Name.***
7. Press **Enter** and the file will be inserted at the top of the field list on the left above ***Number of Children.***
8. **Exit** one time and select the option from the ***Definition Menu, Format Output.***
9. Highlight the ***Family Name*** field and insert it into the format**.**
10. Using your left **arrow key** move the field to the far left of the window**.**
11. Press ***Enter*** to set the field in place**.**
12. Click on the ***Exit*** icon twice and answer**,** "**Yes,**" to save the definition**.**

You have successfully completed your first task.

Notes:

CREATING YOUR OWN REPORT

Exercise:

Create a report which will give the pastor the report in the assignment.

The pastor will use the report to setup visitation contacts through Member Records.
The Congregation Care Group will be setting up the contacts, making the calls or visits.
The Pastor would like the target group for visitation to be those individuals who have not attended the church in the past six months. The Individual Types should be A, I, and V.

Information requested:

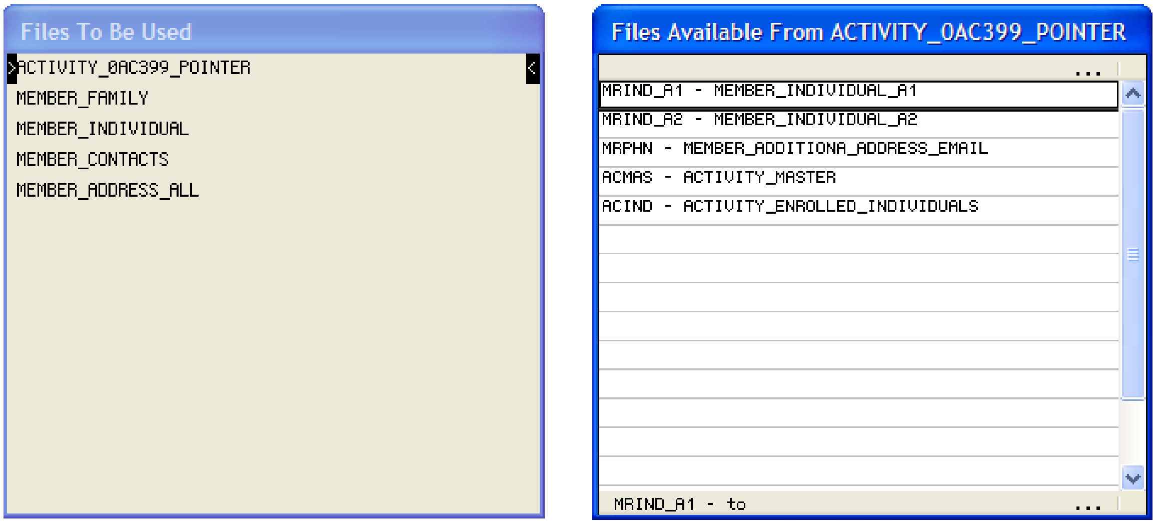
Name of Family
Address
Individuals in the family
Phone Number
Date they first attended the church
Last date attended
If a contact has been made and the date of the last contact

Pastor wants the report ordered in the above order:

Because attendance information comes from Activity Records, we will need to do a merge from Activity Records rather than Member Records.

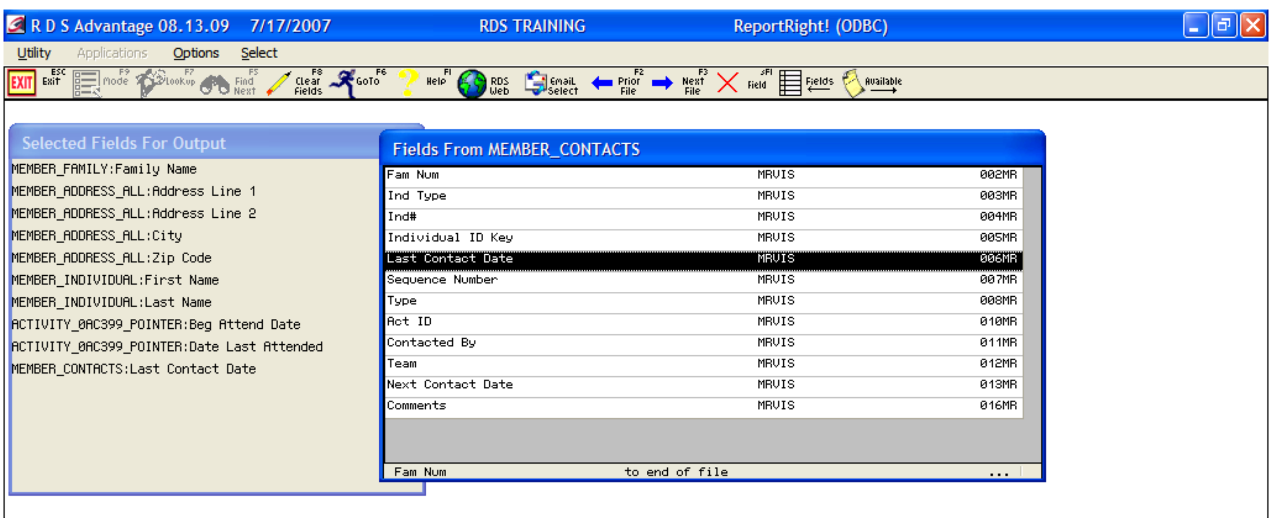
1. Select ***Create Output Definition***.
2. Give your report a name. Use the file name (in this case Activity Records) at the front of the title, i.e., AC: Care Group
3. Click on **OK**.
4. Click on, ***Select the files to use***. You must choose the Activity Merge File first. Merge Files are always identified by the system name, i.e., AC: followed by 399, thus AC:399 is the merge file for Activity Records.
5. Which file (s) did you choose? ____

Compare your selections with the selections displayed in the window on the next page.
Were yours the same?



Note the files selected above. These were selected because they contain the fields of information requested by the pastor.

6. Continue with the report setup by exiting the ***Files to be Used***.
7. Select ***fields for output***.
8. Move from file to file by clicking on ⟶ ***Next File***. Select the files in the order that you plan to use them. Check your selections and their order with the window below.

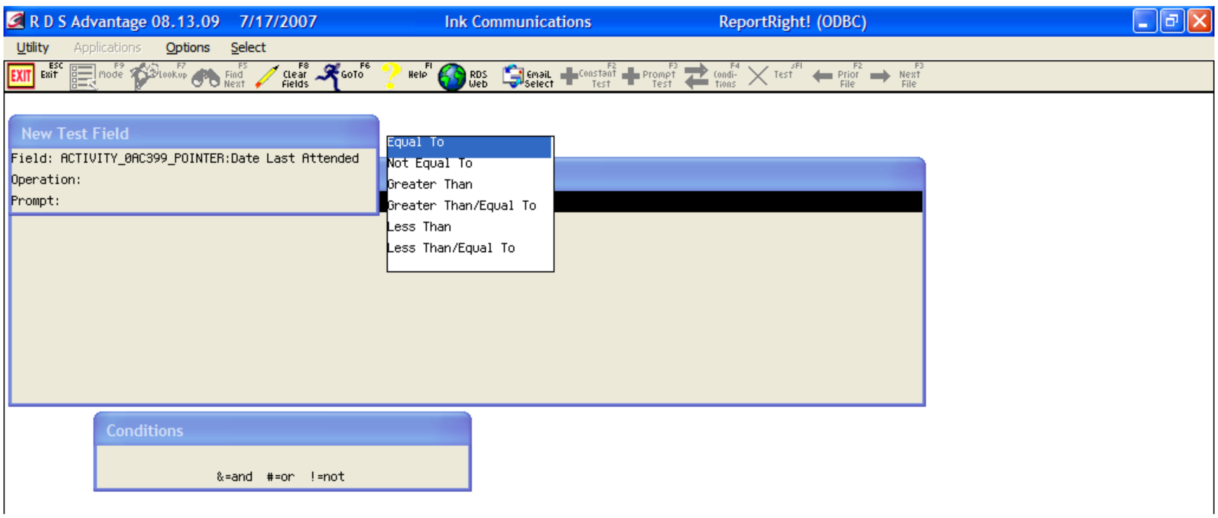


9. Select from the files that contain the fields of information needed as in the example above. After all fields are selected***, Exit.***
10. Choose from the ***Definition Steps*** menu, ***Create Tests.***
11. Click on the icon for ***Prompt Test***.

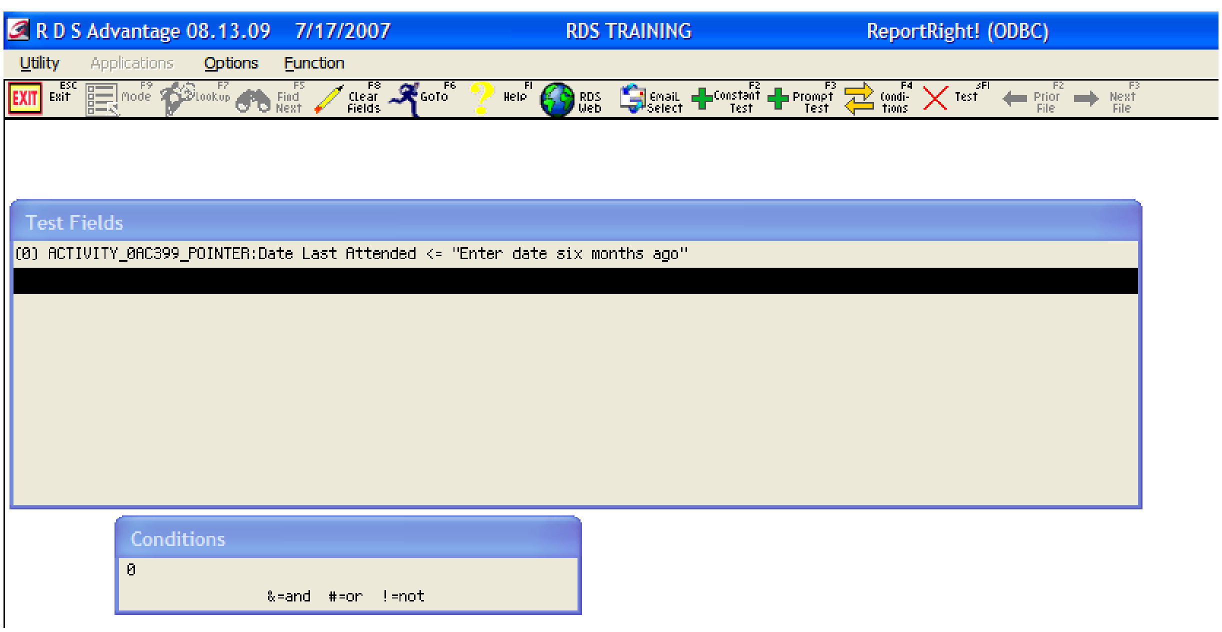
A ***Prompt test*** allows the user to change the condition each time that it is run. For example, the next time the report is run, one might want to choose an earlier date or a later date. If so, a different date may be entered when the user selects the report to print or view.

A ***Constant test*** is one where the condition is set initially and is true (does not change) each time the report is printed or viewed. The only way that it can be changed is to delete the condition and the test and re-enter a new one. Therefore, if you feel that the test will need to change frequently, use the ***Prompt test*** rather than the ***Constant test***.

12. We are choosing a Prompt Test because the date last attended will always change.
13. Highlight the **AC399: Date last attended.**
14. Double Click on the selection**.**
15. The window as shown on page 9 will be displayed.



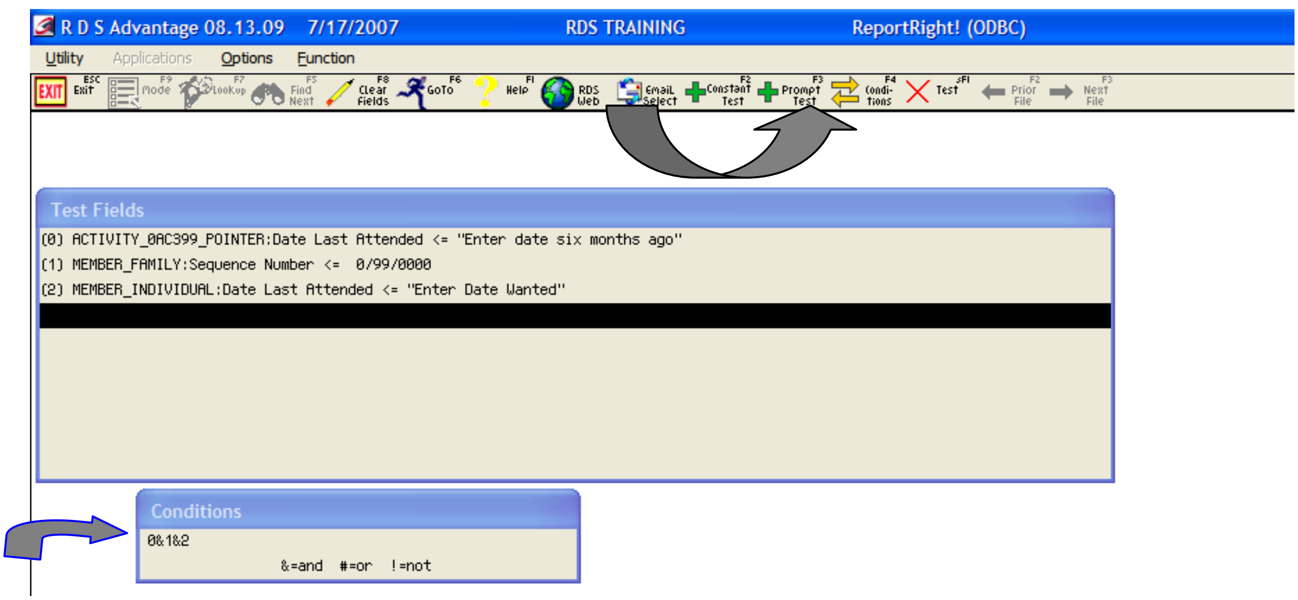
15. Choose ***Less Than/Equal to.*** We want a date which will be equal to the first date six months ago. For example, if today's date is 10/01/xx, then the date to enter would be ***3/31/xx.***



16.Choose another test. This time we will choose a ***Constant*** test.
17. Chose ***Sequence Number*** from ***Member__Family*** file.
18. Chose ***Less Than/Equal To*** and enter **99** in the ***Constant:*** field.
This will select anyone who has had zero contacts or up to 99 contacts. Remember the pastor wanted to know if they had been contacted and the last date of the contact. The selection which you made will give only the first part of that information-if they have been contacted or not***. Your window should be the same as displayed below.***
In order to change a condition you must select ***Change Condition*** icon, highlight the condition and press the space bar. This will take out the condition
Move the cursor to highlight the condition to delete and use the delete test icon, (X test).
Note: If the merge has eliminated the need for conditions this step may be omitted.

19.Click on the ***Prompt Test*** icon and select the ***Activity __ 0AC399__Pointer*** the field ***Date Last Attended***.

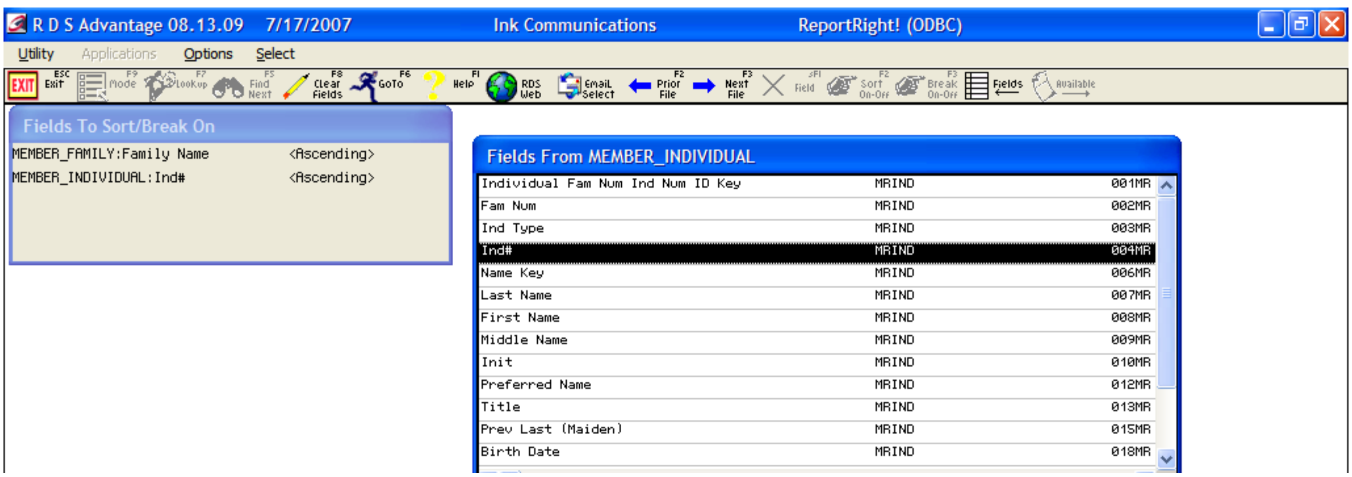
20. Select ***Equal To/Less Than.***
21. Type in the test box, **"Enter Date Wanted."** The actual date will be entered when the report is printed.



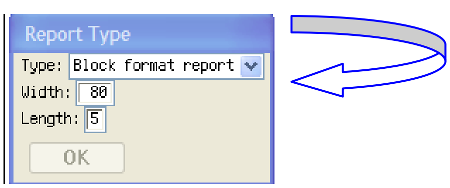
The test condition is displayed in the **Conditions** box. The "0" is the first Condition selected. If others were selected the box would show 0 & 1 & 2 and so on. Up to nine conditions may be selected. However, in most cases only one or two are necessary.
The & sign inserted between the conditions means **both** the conditions must be met. In the above example, all three conditions must be met before the individual will be selected. If the # sign is used between a condition and the next condition it means that the first condition **or** the second condition needs to be met. If the ! sign is inserted between two conditions it means that the first condition needs to be met but not the second condition.

In some cases the use of ( ) are helpful to group like tests together. For example: (1&2)!3.

18. ***Exit*** to the ***Definition Steps Menu***.
19. Choose ***Select Sort Fields.***
20. Click on the ***Previous File*** icon.
21. Select from the ***Member _Family File*** *the option*, ***Family Name***. This option will be displayed on the left side of the window.
22. Choose ***Previous File*** *icon* until the ***Member_Indivudual file*** is displayed. From this file choose ***Ind #.***
23. If you want to change from Ascending Order to Descending Order, choose ***Fields icon*** and highlight the field name, then click on the ***Sort On/Off icon***.
    If you should choose the wrong field, click on the ← ***Fields*** icon, highlight the incorrect field and delete it with the ***Delete*** icon.

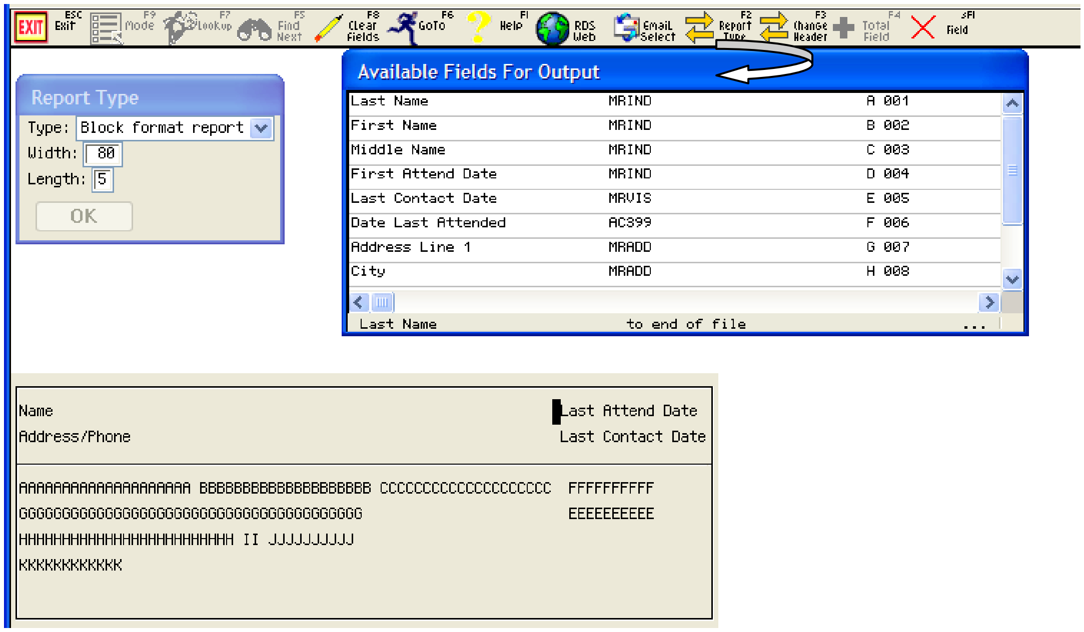


24. ***Exit*** once to the ***Definitions Steps*** menu
25. Select ***Format the Output***.
26. The following will be displayed:
    There are three types of report formats. Columnar allows one line per record and automatically creates a header, Block allow up to six lines per record and the user defines the header and User Defined allows up to 6 lines but does not give a header.

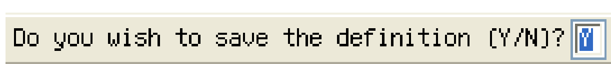


25. From the options displayed beside **Type:,** select ***Block format report.***
26. Choose ***80*** in the width field.
27. Choose ***5*** for the length field.
28. Click on ***OK.***

The following screen will be our goal:



29. Select from the Box for ***Available Fields for Output*** the first field that you want to place in the format box, ***Last Name.*** Once the field is placed in the format area, press ***Enter*** to set the field**.**
30. Continue selecting the fields in the order that you want to see them. **Note: If a field is not automatically displayed where you want it, use the arrow keys to move the field up, down or right and left.**
31. Click on the ***Change Header*** icon and type in the name of the field as displayed in the screen above. You will need to use the ***up arrow key*** to move to the top line and the ***space bar*** or arrow keys to move across the header to enter different field names. Use the ***down arrow key*** to move to the second line.
32. Once the formatting is correct use the ***EXIT*** icon three times until the following question:



33. Answer ***Y*** to save your report format.

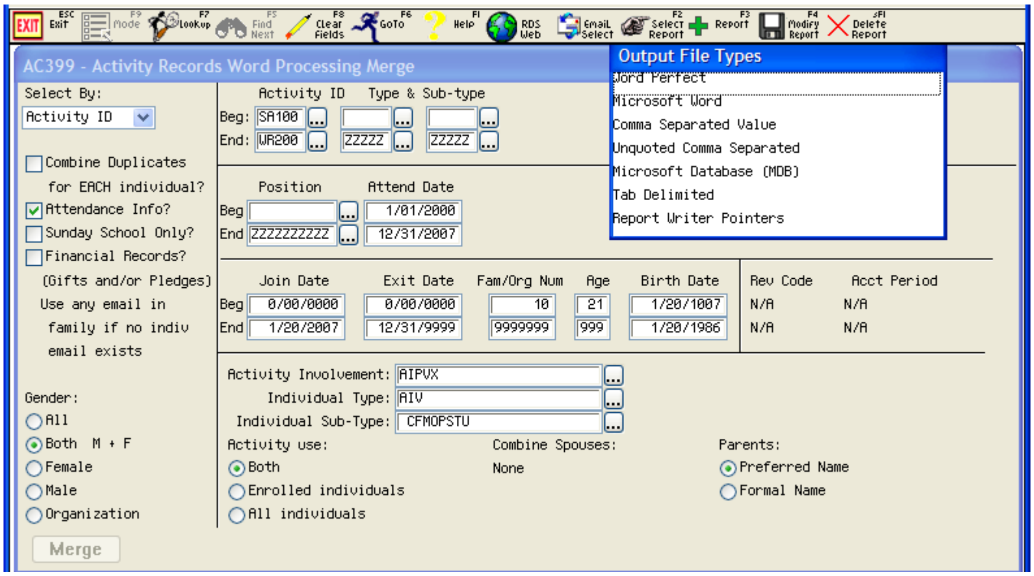
Since you selected the AC399: Merge file, you must complete a merge to Report Writer pointers. Instructions follow:

Merging Data

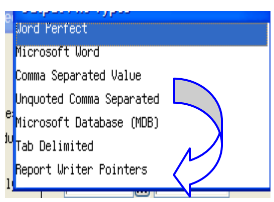
The merge capabilities in RDS allow you to eliminate some of the data that you do not need, such as members who do not match the qualifications, and it allows you to include only certain groups in the merge, such as age groups, marital statuses or first visit dates. This saves time setting up the reports because it eliminates the need for most tests. Merges are available from **Member Records, Activity Records, Financial Records** and **Payroll. Member Records** and **Activity Records Merges** may be accessed through **ReportRight! Options** Menu.

To complete the previous exercise, we will send a merge to Report Writer Pointers.

1. Select the ***ReportRight! Options*** menu
2. Select **Activity *Records***.
3. Fill out the window as follows:



4. After completing the merge window selections, click on Merge.
5. Select from the ***Ouput File Types, Report Writer Pointers.***



6.Under the ***ReportRight! Options*** menu, select ***View Output.***
7. Select from the menu the report name, ***AC:Care Group.***
8. Select ***View output.***
9. Enter a date that was six months ago in the prompt box.
10. Enter the most recent date for the Contact date on the second test field.
11. View your report. Does it look as you planned?
12. If you want to make changes to your report (add a test for an Individual Type field to your report) use the following instructions.

How to Modify or Duplicate Your Report

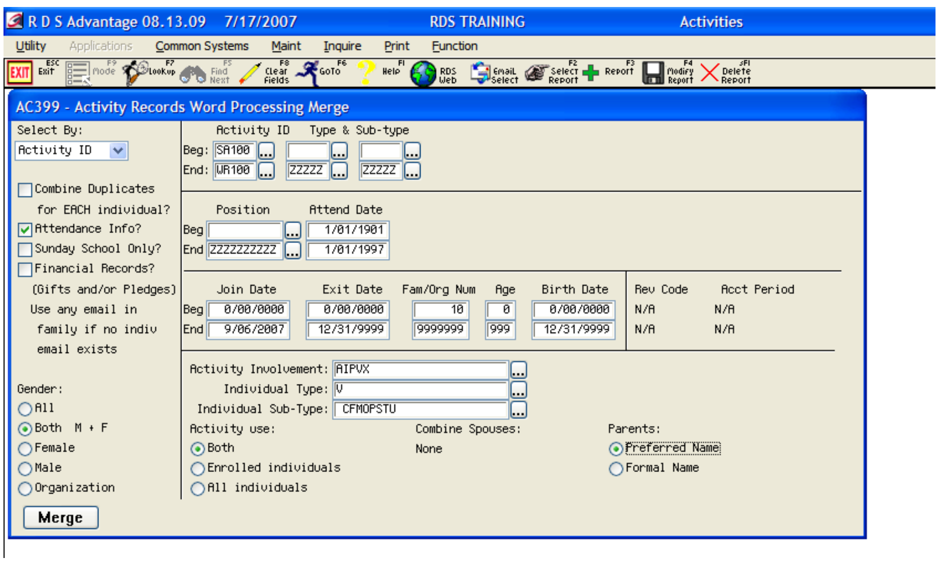
The following assignment can be accomplished using the same setup just completed with a few modifications. Let's look at the assignment and discuss what changes need to be made and how to make them.

Exercise:

The pastor would like a report listing the people who are still an Individual Type, Visitor, and began visiting before 1997.

Exercise:

1. In ReportRight! select ***Options Menu.***
2. Select ***Merge Right***!
3. Select ***Member Records.***
4. Make the selections as shown on the following page.

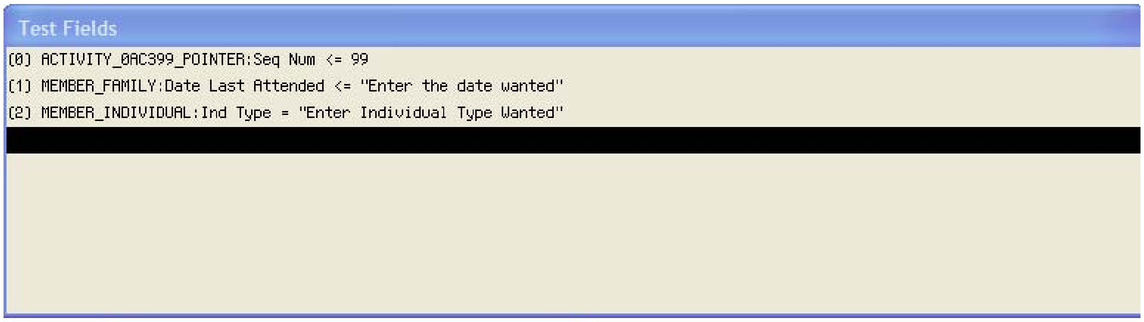


5. Click on ***Merge.***
6. Choose ***Report Writer Pointers.***

Your merge has made the tests entered in the AC:Care Group setup unnecessary. You will need to Duplicate your report.

To Duplicate a Report

1. Select from the ***Options Menu, Duplicate Output Definition.***
2. Select the report name, ***AC:Care Group.***
3. Select ***Definition Steps*** option***, Create Tests.***
4. Give your report a new title: **AC: Long Term Visitors**.
5. Click on ***OK.***
6. Scroll down to ***Create Tests.***
7. Choose the ***Conditions icon.***



8. In the ***Conditions*** box delete the conditions by pressing the space bar on your keyboard, then press **Enter.**

9. Using the **Up arrow key** highlight each individual test and click on the ***Delete Test*** icon until tests are removed.

10. Exit and save your definition.

11. Select from the ***Options Menu, ViewOuput or Print Output.***

Note: In the above Duplicate exercise, the Individual Type and first attend date were controlled through the merge. It is always good to think through what data is needed before merging and creating the output. This thought process can eliminate time in setup for unnecessary tests.

Choosing the Correct Merge

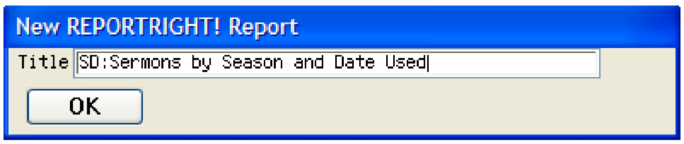
Activity merges would contain other types of data than the Member Records Merge**. However,** the Activity Records Merge does link many files from Member Records**.** If the user wants to include Attendance information, but would need names, address, e-mails which are contained in Member Records then an Activity Merge would be used in place of a Member Records Merge. Some Financial information is available through Activity Records Merge, as well.

It is important for the user to become familiar with all four merge files in order to determine which merge will meet the needs of setting up a report.

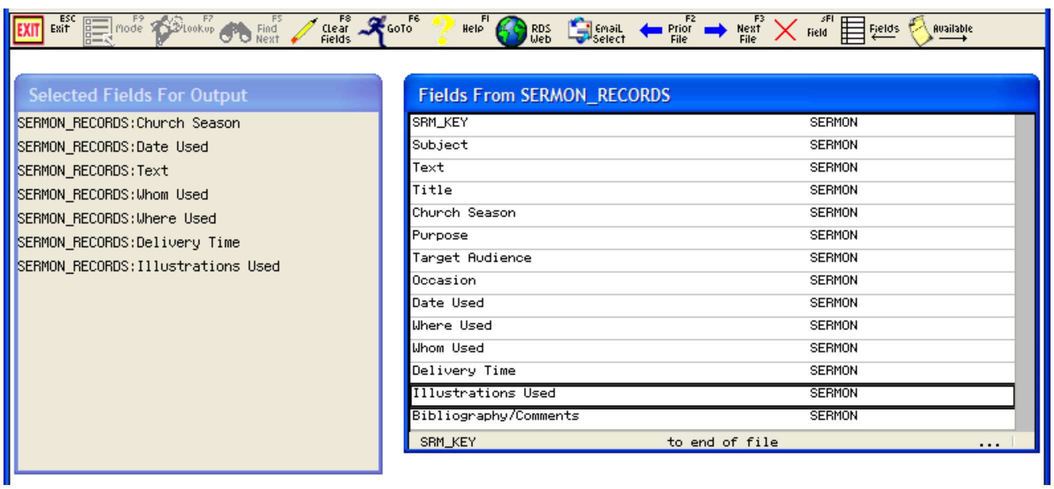
Reports Not Requiring A Merge

There are some reports which may be created using single files rather than merge files. In the following exercise we will be creating a report which does not use a merge file.

1. Select from the Options menu, ***Create Output Definition***.
2. Give your report a name. Use the file name at the front of the title, i.e., SD for Sermon Files.
3. Let's call this SD:Sermons by Season and Date Used.

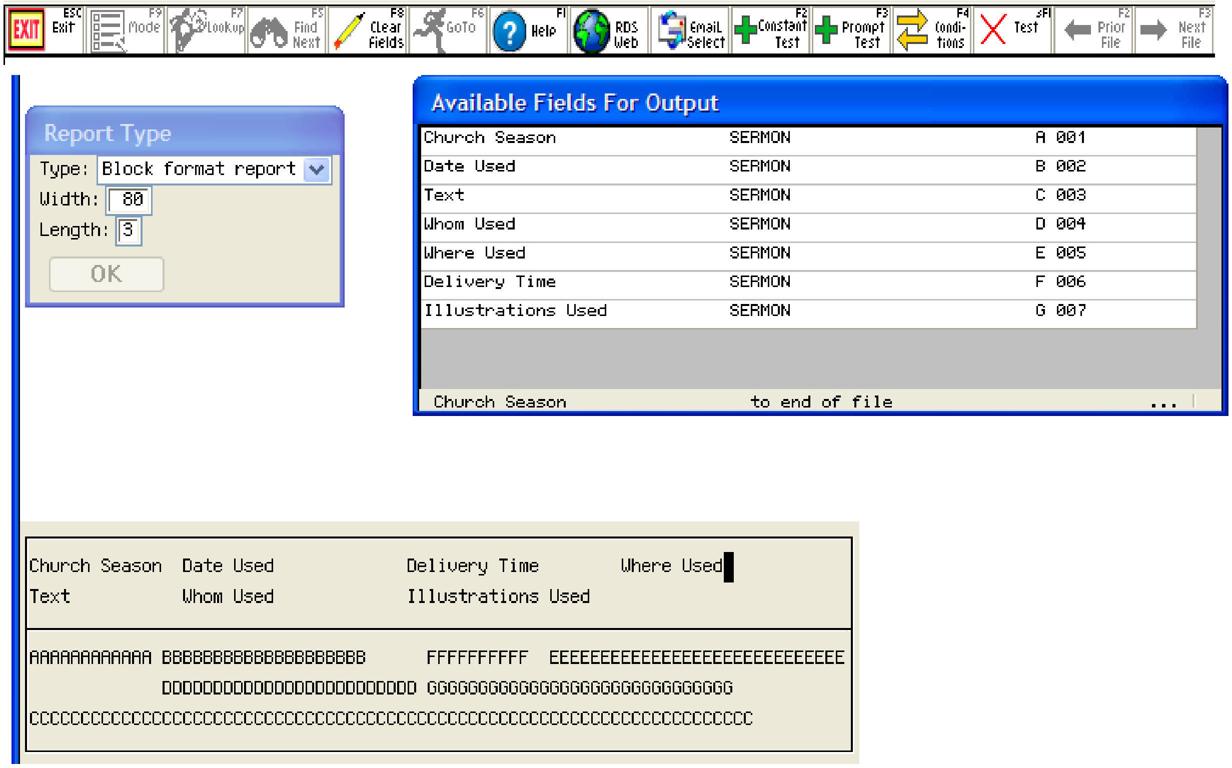


4. Click on OK.
5. Click on, ***Select the files to use***.
6. Choose from the ***Options Menu, Select files to use.***
7. Scroll through the files to ***Sermon Records*** (a single file) and select.
8. Exit and choose, ***Select fields for output.***



9. Select the fields that are displayed above.
10. Exit to ***Create tests.***
11. Select the ***Prompt test*** icon.
12. Select the test field of ***Church Season***.
13. Type in, "Enter Season of the Year."
14. Exit and choose ***Select sort fields***.
15. Choose ***Date Used*** .
16. ***Exit*** and ***Format the output***.

Select the format order as you would like to see if printed. The following example is for illustration. You may want to place fields in different positions.



17. ***Exit*** and save your definition.
18. Choose from the ***Options menu, View output.***

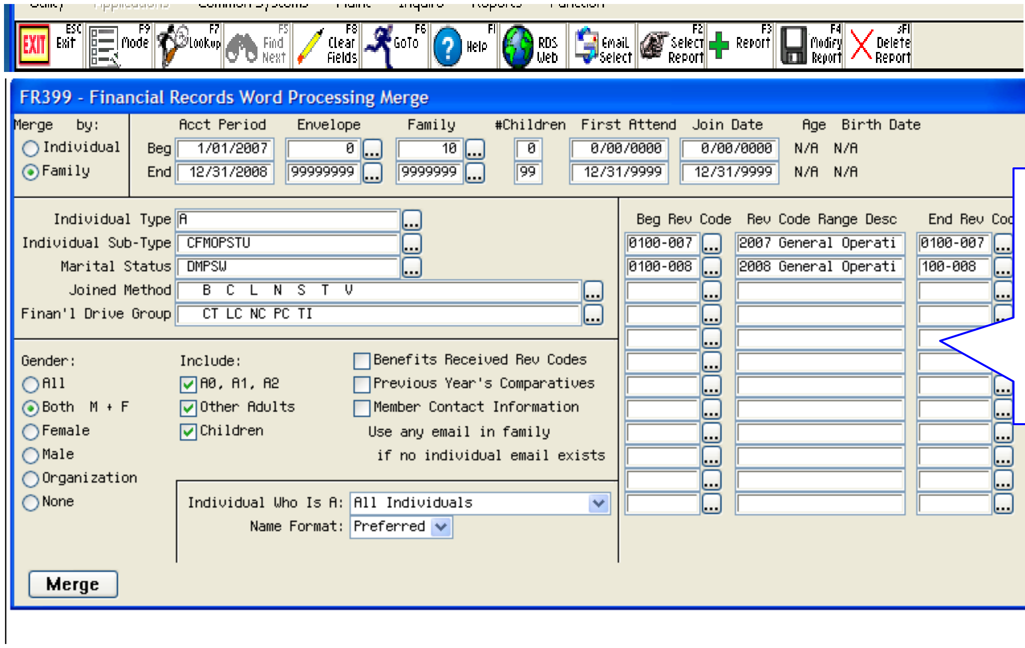
Merging from Financial Records and Creating a Report

Exercise: The Finance Committee would like a report which shows all Members of the church who pledged last year but who have not yet pledged this year. They do not want to see amounts, just the names of those who match the criteria.

Financial Records uses Revenue Codes to designate where each contributor has specified where his financial gifts will be posted. The pledged Revenue Code for last year was 100-007 and this years Revenue Code is 100-008. Pledges have already been added to 100-008 for the coming year. Only those who have turned in their pledge cards have been entered.

Before we setup our report we will send a merge file from Financial Records to Report Writer Pointers.

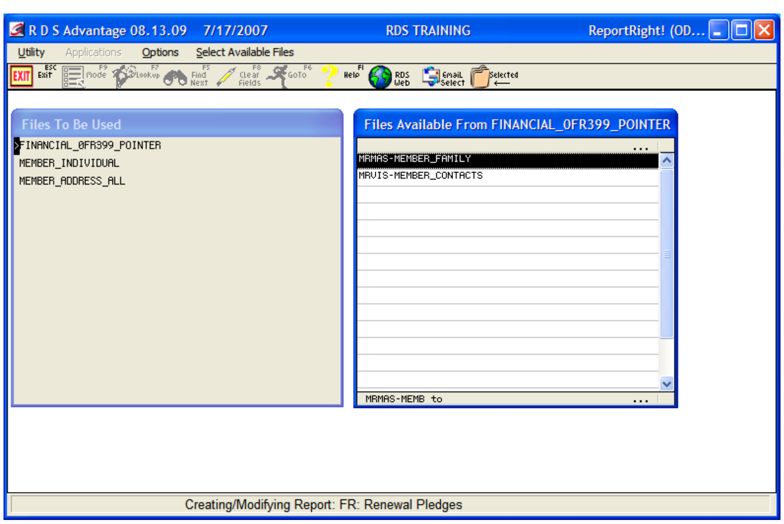
1. Select from the RDS ***Applications Menu, Financial Records.***
2. Select the ***Print*** option from the Menu bar.
3. Scroll to the bottom of the menu and select ***MergeRight!***
4. Fill out the merge window as shown below.



Remember this is Rev 1 and the following is Revenue 2.

Revenue 1-12 may be individual Revenue Codes from your data. If you want to use individual Revenue Codes the Beg and End Rev Code must be the same code number. If you want a range of Revenue Codes and have ReportRight! look at that line as one combined revenue, put the lowest numbered Revenue Code in the Beg Rev Code field on line 1 and the highest numbered Revenue Code on the End Rev Code field on line 1. **The key is to remember that ReportRight! only looks at the line position of the Revenue Code not the code itself.**

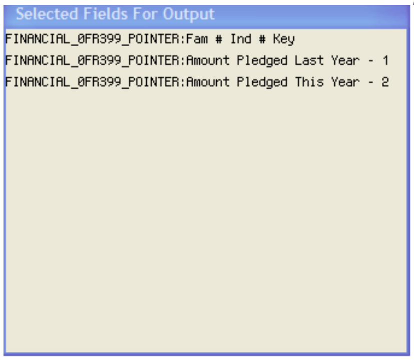
5. Click on ***Merge.***
6. Select ***Report Writer Pointers.***
7. ***Exit*** Financial Records.
8. Select from the ***Applications Menu, ReportRight!***
9. Choose under ***Options, Create Output Definition***.
10. In the Title box give your report a name, i.e., FR: Renewal Pledges.
11. Choose ***Definition Steps*** and ***Select files to use.***
12. Scroll down until you see ***FR399.*** Select this file**.**
13. ***Other files which you might choose: MRIND: Member_Individual and Member_Address_All.***



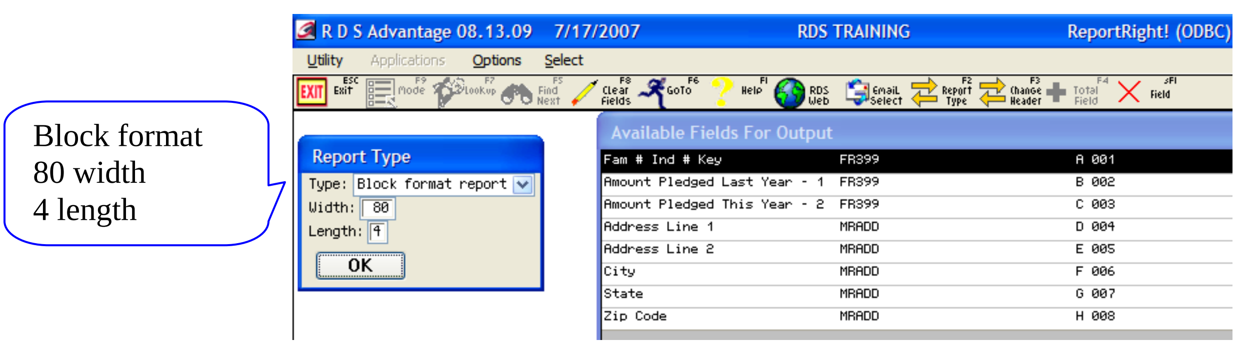
14. Exit to the ***Definition Steps*** and choose ***Select fields for Output***.

You will want to select the fields that will give you the person's name, what they pledge last year and what they have pledged this year, plus, you may want to choose their address fields in case a mail merge letter will be written.

15. Select from the ***FR:399 file*** the following files:

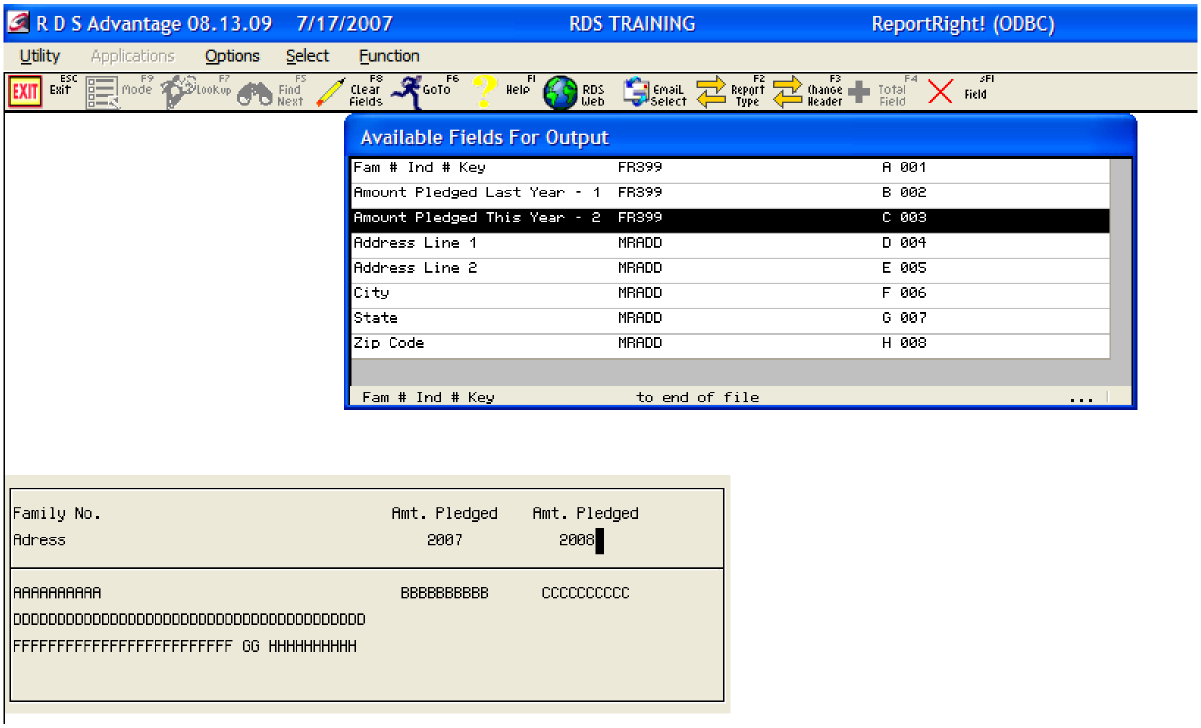


16. Continue selecting files needed by clicking on the ***Next File*** icon.
17. Choose any field from the ***Member_Individual*** file (Optional).
18. Click on the ***Next File*** icon for ***Member_Address_All***.
19. Choose ***Address line 1, City, State,*** and ***Zip Code*** fields.
20. ***Exit*** *to the* ***Definition Steps, Create tests***.
21. Select a ***Constant test*** and field***, Amount pledged last year 1.***
22. Select ***Greater than/Equal to*** and enter a numeral 1 in the test field. The system will convert the "1" to "0.01." This will pick up anyone who pledged over one cent last year to the Revenue Code you entered on line one in your merge screen.
23. Select ***Constant test*** again and field ***Amount pledged this year 2.***
24. Select ***Less than*** for the test box and enter the numeral 1. This will give you all who have not pledged to Revenue Code 2 this year.
25. Exit to the ***Definition Steps*** and choose, ***Select sort fields***.
26. Move to the next file by selecting ***Next File*** icon.
27. Choose from the ***Member_Individual*** file ***Last Name***.
28. Exit and choose ***Format the output***.
29. Choose as follows:



28. Click on **OK.**

29. Click on each field displayed under ***Available Fields for Output*** in the order and placement that you want for your report. You may use the screen print on the next page for an example.

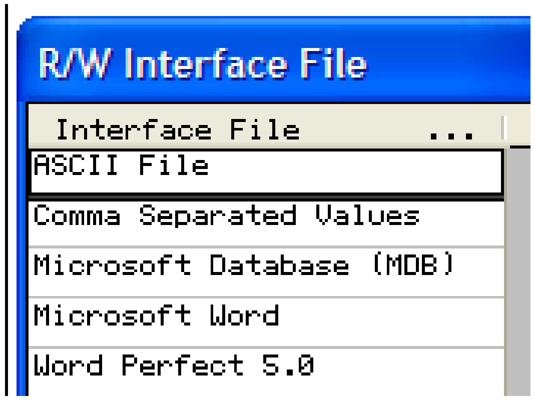


30. ***Exit*** and save your definition.

You have completed the setup for your Financial Records report. You may go to the Options menu and print your report or you may want to do a Mail Merge letter from the data that you printed contacting those who pledged last year but who have not pledged this year.

Merging Data to Microsoft Word for a Mail Merge Letter

Merging from RDS to other software applications is quite simple. If the other application will accept any of the displayed files.



Exercise: Sending a Personalized Letter from Data in ReportRight!

1. From the Options Menu, select ***Build Interface File.***
2. Select the interface file wanted. We will select ***Microsoft Word.***
3. Select where you want to send the file, i.e., ***My Documents***.
4. Give the file a name, i.e., Pledger.
5. Click on ***OK.***
6. Enter Microsoft Word.
7. Select Tools, Letters and Mailings, Mail Merge….
8. Select the document type , ***letters.***
9. Follow the Mail Merge Wizard at the right of your screen.
10. Select Step 1, ***Starting Document***.
11. Select ***Use Current Document***.
12. Select ***Next recipients***.
13. Choose the **Browse** button and locate your file.
14. Select ***Write your letters***.
15. Choose ***More items*** from the selection list.
16. Choose ***Preview your letters.***
17. If all letters are satisfactory chose to ***print.***