ACS Reports and Report Designer

Reports

ACS People Suite and ACS Financial Suite offer many reports to fit your church, school, or organization's needs. The reports are included with your software, and you can customize them in a variety of ways. When you select a report in either product, you can view a sample report with demo data as well as a report description, which can help you determine if a report will fit your needs before you print it.

Some tasks apply to all reports, such as e-mailing and exporting reports. If this is what you're looking for, you're in the right place- select a topic below to learn more about working with reports in general.

If you can't customize a report to suit your needs, check out Report Designer to create a new report from scratch.

The Reports Window

In the ACS reports window, you can select pre-configured reports for each area of ACS People and Financial suites. You can customize, preview, save these reports, and much more.

Here's a visual overview of the Reports window.

1. Open and log in to ACS People Suite.
2. Under **Searches and Reports**, click the **Reports** tab.
3. Select the area you want to generate a report for and click **Go** .

1. Open and log in to ACS Financial Suite.
2. Under **Generate Reports**, click the **Reports** tab.
3. Select the area you want to generate a report for and click **Go** .

Customizing Reports

ACS reports are highly customizable, but not all customization options are available for all reports.

1. In the Reports window, select the report you want to customize
2. If customizing a Contributions or Financial Suite report, select the appropriate date range in the lower sidebar.
3. Click **Customize**.

4. Select the options you want to display on your report. To learn about these customization options, see the ACS User Guide and select the area you are working in.
5. To display your report, click **Preview**.

Displaying Names Formally and Informally in Reports

In ACS Reports, you can choose to display names formally, informally, or using a custom name format. This is helpful when you are adapting reports to different situations.

For example, Contributions statements often use formal names to ensure that they match government records when tax season comes around. The formal, informal, and custom names are stored with individual's records in ACS People. You can also choose whether or not to include middle names, "goes by" names, titles, and suffixes, or print last names before first names.

1. In the reports window, select the report you want to customize.
2. **Optional:** If customizing a Contributions or Financial Suite report, select the appropriate date range in the lower sidebar.
3. Click **Customize**.
4. Under **Name Options**, select either **Formal Label Name**, **Informal Label Name**, or **Custom Label Name**.
5. Select or clear the other options according to your preference.
6. To view the report, click **Preview**.

Filtering Reports

Filtering reports lets you narrow down what data is included in the report. Think of filtering as a quick version of searching. For example, if you want to send a letter to all women in your organization, you can add a filter to show only women in the Master Listing of Addresses report.

Note

Filtering is not available for all reports. If this is the case, the option is grayed-out.

1. In the reports window, select the report you want to filter.
2. **Optional:** If the report is a Contributions or Financial Suite report, select the appropriate date range in the lower sidebar.
3. Click **Customize**.
4. On the **Report Options** tab, select **Filter**, then click **Select**.
5. In the Edit Report Filter window, under **Available Fields**, expand the field categories until you locate a field you want to apply to the filter.
6. Select the field and click **Add**.
7. Enter the criteria for the field and click **OK**. For example, "gender = female."
8. When you finish adding criteria to the filter, click **Close**.
9. To view the filtered report, click **Preview**.

Flagging People in Reports

In many ACS reports, you can select member statuses in the report results.

For example, you might need to prepare a Master Listing of People report with non-resident members flagged so you can send them a special insert for your organization's homecoming celebration. In this situation, the **Flag People** option comes in handy, and people with the member status you selected are flagged with an asterisk.

Flagging people is not available for all reports. If this is the case, the option is grayed-out.

1. In the reports window, select the report you want to customize.
2. **Optional:** If the report is a Contributions or Financial Suite report, select the appropriate date range in the lower sidebar.
3. Click **Customize**.
4. Under **Report Options**, select **Flag People** and click **Select**.
5. In the **Member Statuses** column, select the member status you want to flag and click **Add**. Your selection displays in the **Selected Member Statuses** column. You can select up to five statuses, depending on the report.
6. To accept your selections and return to the customize window, click **Close**.
7. To view the report, click **Preview**.

Grouping People in Reports

Similar to sorting, you can group individuals by up to four different fields in report results. Additionally, you can choose to require a page-break after each group.

For example, suppose your church assigns elders to each family and you use a custom field in ACS to track elder assignments. On occasion, you probably need to print a list of families and elder assignments so that the elders know who they're responsible for. (A helpful report for this is the Names and Special Fields report.) In this case, you can group the families by their assigned elder. To make it easier to hand out the printed pages, you can require a page-break after each elder's list of assignments.

Note

Grouping people is not available for all reports.

1. In the reports window, select the report.
2. If the report is a Contributions or Financial Suite report, select the report's date range in the lower sidebar.
3. Click **Customize**.
4. Under **Formatting**, select **Group** and click **Select**.
5. In the **Fields** column, select the field and click **Add**.
6. When you are finished selecting the fields to group by, click **Close**.
7. To require a page-break after each group, select **Page Break on Last Group**.
8. To view the report, click **Preview**.

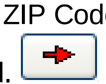
Hiding Area Codes in Reports

In many ACS reports, you can hide phone number area codes in the report results. For example, say you need to print a Master Listing of People to keep on file for reference. Since most of your organization's members have the same area code, you decide to hide the area code in the report results. All phone numbers with that area code display without the area code. Other phone numbers with area codes still display their area codes.

1. In the reports window, select the report.
2. If the report is a Contributions or Financial Suite report, select the report's date range in the lower sidebar.
3. Click **Customize**.
4. Under **Formatting**, select **Suppress Area Code** and click **Select**. The Suppress Area Code window displays.
5. Enter the area code you want to hide.
6. Click **Add** . The area code displays in the **Suppressed Area Codes** column. You can enter up to five area codes, depending on the report.
7. When you are finished entering area codes, click **Close**.
8. To view the report, click **Preview**.

Hiding City, State, and ZIP Codes in Reports

In many ACS reports, you can hide the city, state, and ZIP code in the report results. For example, say you need to print a Master Listing of People to keep on file for reference. Since most of your organization's members live in the same city, you decide to hide the city, state, and ZIP code in the report results. The city, state, and ZIP code still displays for anyone who doesn't live within the specified ZIP code.

1. In the Reports window, select the report.
2. If the report is a Contributions or Financial Suite report, select the report's date range in the lower sidebar.
3. Click **Customize**.
4. On the **Report Options** tab, under **Formatting**, select **Suppress City State Zip** and click **Select**.
5. Enter the ZIP Code for the city and state you want to hide.
6. Click **Add**.  The ZIP code displays in the **Suppressed ZIP Codes** column. You can enter up to five ZIP Codes, depending on the report. When you finish, click **Close**.
7. To view the report, click **Preview**.

Including Comments in Reports

You can print comments on a report, depending on the selected report. For example, let's say you have a comment field named Home Directions. You can print this comment field on a report and give it to your visitation team.

1. In the Reports window, select the report.

2. If the report is a Contributions or Financial Suite report, select the appropriate date range in the lower sidebar.
3. Click **Customize**.
4. Under **Formatting**, select **Print Comments** and click **Select**.
5. Under **Comment Types**, select the comment type you want and click **Add**.
6. To save your selections, click **Close**.
7. To view the report, click **Preview**.

Including Special Fields in Reports

Including special fields in your reports lets you print information that is not included by default. For example, your youth pastor may want a list of all high school students who attend your church. Additionally, besides typical name and address information, she wants the following included: their school's name, the subdivision they live in, the date they last attended church, and their parents' names.

The availability of special fields depends on what you track in ACS and, in some instances, the security level of the user setting up the report. Fields such as age, date of birth, and social security number are not available if security for the user is set to **None** for these options. You can select up to ten special fields.

> **Note**
>
> Special fields are not available for all reports.

1. In the Reports window, select the report you want to customize.
2. If the report is a Contributions or Financial Suite report, select the report's date range in the lower sidebar.
3. Click **Customize**.
4. Under **Report Options**, select **Special Fields** and click **Select**. The Special Fields window displays.
5. In the **Column** drop-down list, select the special field that you want to include.
6. If you want to change how the field displays in the report, enter a new name under **Description**.
7. To move the field to the **Selected Special Fields** column, click **Add**.
8. To change the sort order of the fields in the **Selected Special Fields** column, select a field and click
   the **Up** or **Down** .
9. To accept your selections and return to the customize window, click **Close**.
10. To view the report, click **Preview**.

Newsletter Flags

When selecting Newsletter Flag as a special field, a code will print on the report under the Newsletter Flag column. This code is based on a combination of the Newsletter flag and the Deliver by flag.

Report Code	Newsletter Flag	Deliver by Flag
N	None	None
2	Individual	Both
I	Individual	Mail
1	Individual	E-mail
B	Family	Both
F	Family	Mail
E	Family	E-mail

Selecting a Date Range for Reports

In many ACS reports, you can select a date range to apply to the report results. Selecting a date range limits the report results based on the records that fall within the date range. For example, if you select the date range January 1, 2011 — June 1, 2011 for the People Changes Log, and the report displays only the changes made between those dates.

1. In the reports window, select the report you want to customize.
2. In the lower sidebar, click **Customize**.
3. Under **Date Range**, select **Use Date Range**.
4. In the first date field, select the start date.
5. In the second date field, select the end date.
6. To view the report, click **Preview**.

Sorting within Reports

In many ACS reports, you can sort the order in which individuals or organizations display in the report. When you custom sort a report, you specify the ACS field on which to sort, such as age, city, date joined, marital status, or record type. You can select up to four fields to sort by, depending upon the report.

For example, suppose your organization is planning social events for single and married members of different age groups. You need to print a listing of all members, sorted by marital status and date of birth. When customizing the report, you'd select **Custom Sort** and sort by the **Marital Status** and **Date of Birth** fields. When you preview the report, your members are grouped by marital status and date of birth.

> ⚠ **Note**
>
> Custom sorting is not available for all reports. If this is the case, the option is grayed-out.

1. In the reports window, select the report.

2. If you're working with a Contributions or Financial Suite report, select the report's date range in the lower sidebar.
3. Click **Customize**.
4. Under **Report Options**, select **Custom Sort** and click **Select**. The Selection window displays.
5. In the **Fields** column, select the field you want to sort by.
6. To move the field to the **Selected Fields** column, click **Add**.
7. To change the sort order of the fields, select a field and click the **Up** or **Down**.
8. To accept your selections and return to the customize window, click **Close**.
9. To view the report, click **Preview**. When the report displays, it is sorted by the selected fields.

Managing Report Page Setup

After customizing and previewing a report, you can manage its page setup. You can control the paper size, margins, and orientation of the report. This is helpful for printing reports that require specific paper, such as contributions statements.

1. In the Reports window, select the report.
2. If you're working with a Contributions or Financial Suite report, select the report's date range in the lower sidebar.
3. Click **Customize**.
4. Select the appropriate report options, then click **Preview**.
5. On the reports toolbar, click **Page Setup**.
6. Under **Paper Size**, manage the width and height of the paper.
7. On the **Margins** tab, manage the margins and page orientation.
8. Click **OK**.

Searching for Text in Reports

Sometimes when you generate a report, you want to look at a specific area of data. For example, when you generate an attendance report, you may want to see how many absences a specific person had. Rather than scour the report for that person, you can simply search for his or her name.

You can search for matching whole words only, for matching capitalization, and starting from the first or last page of the report.

1. In the Reports window, select the report.
2. If you're working with a Contributions or Financial Suite report, select the report's date range in the lower sidebar.
3. Click **Customize**.
4. Select the appropriate report options, then click **Preview**.
5. On the reports toolbar, click **Search**.
6. Enter the text you are looking for. For example, *Jane Smith*
7. Press **Enter**.

8. The first occurrence of the text is highlighted and displays in the report preview. To see the next occurrence of the text, click **Next**. 

Previewing Reports

Many pre-configured reports are available for you in ACS, and sample reports display when you select a report. However, you can **preview** reports with your own ACS data, which gives you a better idea of how the report might be useful to your church or organization and also lets you see how many pages the report is.

After previewing the report, you may want to search within the report, customize, print, e-mail, or export it.

1. In the reports window, select the report.
2. In the lower sidebar, click **Preview**. The report displays with your organization's data.

Setting Report Fonts

You can customize the fonts that display on a report. When customizing fonts, keep in mind that reports are designed for certain font sizes; using other fonts or changing the font size may result in formatting issues. For example, when printing labels, a different font style/size may cause the text to run off the label. Always check for formatting issues by previewing the report after you change the font.

Changes to a report's font are not permanent unless you save the report. Changing a font only affects the current report; it doesn't affect any other reports.

1. In the reports window, select the report you want to generate.
2. If the report is a Contributions or Financial Suite report, select the report's date range in the lower sidebar.
3. Click **Customize**.
4. On the **Report Options** tab, select the appropriate customization options, then click **Preview**.
5. On the reports toolbar, click **Set Font**. 
6. Select the style, color, and font size, then click **OK**.

Copying Reports as Images

Some reports, especially graphs, are particularly useful as images. You can copy the report as an image and paste it into an e-mail, document, or presentation. Keep in mind that when you copy a report as an image, you can only copy the page you are currently viewing; you cannot copy more than one page at time.

1. In the Reports window, select the report you want to copy.
2. If the report is a Contributions or Financial Suite report, select the report's date range in the lower sidebar.
3. Click **Customize**.
4. On the **Report Options** tab, select the appropriate options for your report, then click **Preview**.

5. On the reports toolbar, click **Copy**.
6. Navigate to the location where you want to paste the report image.
7. Right-click and select **Paste**.

Refreshing Reports

You can refresh a report to show the most current data entered into your ACS records. This is helpful if you have multiple people working in ACS at the same time or if you have to step away from your work for an extended period.

Refreshing a report is only necessary if the previewed report is already displaying on your screen. If you have to navigate to the report, you are already generating the most current data when you preview it.

1. In the Reports window, select, customize, and preview your report.
2. On the reports toolbar, click **Refresh**. . The updated report displays.

Renaming Reports

After you have customized and previewed a report, you can rename and save it. You can also rename a report that you have already saved.

Renaming a report can be useful for indicating how you customized it. It is also helpful for making the report recognizable to other users. For example, you can apply a filter to the Master Listing of People report to include only members between the ages of 12 and 17. When you save the report, you might rename it **Youth Members 12 - 17**.

1. In the reports window, select the saved report.
2. In the lower sidebar, select **Preview**. The report displays.
3. On the reports toolbar, click **Save** .
4. In the **Save As** field, enter the new report name. If you want the title at the top of the report to match, enter the new name in the **Report Title** field as well.
5. Click **Save**.

Saving Reports

If you find that you often customize a report in the same way, you should save the report. Saving the report allows to you customize the report settings once and generate the report when you need it.

You can also rename and delete saved reports if you need to.

1. In the Reports window, select the report you want to save.
2. Click **Customize**.
3. On the **Report Options** tab, select the appropriate options for your report. When finished, click **Preview**.
4. On the toolbar, click **Save** .

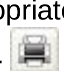
5. Enter the **Save As** file name. (This name appears in the reports sidebar.) 6. Enter the **Report Title**. (The title displays at the top of the report itself.)
7. Enter a **Description**.
8. To make the customized report available to other users, select **Public**.
9. Click **Save**.

1. In the reports window, select the report you want to delete.
2. In the lower sidebar, click **Delete**.
3. When the confirmation message displays, click **Yes**.

Printing Reports

After you have customized and previewed a report, you may want to print it. You may want to print a report to share it with other people, to bring it to a meeting, or to have a hard copy for filing purposes. You can also print a range of pages.

You can also print the report without customizing it, which prints with the default options.

1. In the reports window, select the report you want to print.
2. **Optional:** If printing a Contributions or Financial Suite report, select the appropriate date range in the lower sidebar.
3. To customize your report, click **Customize**.
4. On the **Report Options** tab, make the appropriate selections and click **Preview**.
5. When the report displays, click **Print Report** .
6. In the **Name** drop-down list, select the printer you want to print to.
7. To print only a range of pages, enter the first and last page numbers for the **Page Range**. For example, **7-20**.
8. Under **Copies**, enter the number of copies you want to print.
9. Select any other options and click **OK**.

1. In the reports window, select the report you want to print.
2. **Optional:** If printing a Contributions or Financial Suite report, select the appropriate date range in the lower sidebar.
3. In the lower sidebar, click **Print**. An options window displays.
4. In the **Name** drop-down list, select the printer you want to print to.
5. To print only a range of pages, enter the first and last page numbers for the **Page Range**. For example, **7-20**.
6. Under **Copies**, enter the number of copies you want to print.
7. Select any other options and click **OK**.

Setting up Printers in ACS Financial Suite Reports

When printing reports in ACS Financial Suite, you can select the printer you want to use or update the printer settings, allowing you to further customize report printing.

1. Under Generate Reports, click **Printer Setup**.
2. In the Reports Setup window, select the **Printer** to use when printing reports.

3. Under **Print Settings**, clear the settings you want to change. You can change the default margins, orientation, paper settings, or font.
4. Click **Setup**.
5. In the Page Setup window, select the appropriate options on the **Paper**, Margins, and **Header /Footer** tabs.
   - **Paper** — Select the paper size, width, height, and paper source to use when printing reports.
   - **Margins** — Select the left, right, top, and bottom margins for your report. The default margin is .25. Keep in mind that if you change the margins, words or numbers may not print correctly on your report. You can also change the print orientation (portrait or landscape).
   - **Header/Footer** — Under sections, select the default header, footer, and title section for your report. To create custom headers, footers, and title sections, click **Edit**. To retain the default font you selected in Reports Setup, select **Always Retain Font**. To print a separate title page for the report, under **Default Title Section**, select **Print as Separate Page**.
6. When finished, click **OK.**
7. In the Reports Setup window, click **OK** to save your changes.

Setting up Printers in ACS Reports

When printing reports in ACS People or Financial Suite, you can select the printer you want to use or update the printer settings, allowing you to further customize report printing. It's also a good idea to download updated printer drivers when needed.

1. Under Generate Reports, click **Printer Setup**.
2. In the Reports Setup window, select the **Printer** to use when printing reports.
3. Under **Print Settings**, clear the settings you want to change. You can change the default margins, orientation, paper settings, or font.
4. Click **Setup**.
5. In the Page Setup window, select the appropriate options on the **Paper**, **Margins**, and **Header /Footer** tabs.
   - **Paper** — Select the paper size, width, height, and paper source to use when printing reports.
   - **Margins** — Select the left, right, top, and bottom margins for your report. The default margin is .25. Keep in mind that if you change the margins, words or numbers may not print correctly on your report. You can also change the print orientation (portrait or landscape).
   - **Header/Footer** — Under sections, select the default header, footer, and title section for your report. To create custom headers, footers, and title sections, click **Edit**. To retain the default font you selected in Reports Setup, select **Always Retain Font**. To print a separate title page for the report, under **Default Title Section**, select **Print as Separate Page**.
6. When finished, click **OK**.
7. In the Reports Setup window, click **OK** to save your changes.

E-mailing and Exporting Reports

You can e-mail and export reports in various formats such as PDF files and Excel® spreadsheets. All reports can be exported using the Print to File option from the Print menu. Some reports also have a Data View option that you can export from in formats such as Excel and Microsoft Access®.

1. In the reports window, select the report you want to e-mail.
2. **Optional:** If the report is a Contributions or Financial Suite report, select the appropriate date range in the lower sidebar.

3. Click **Customize**.
4. Select the appropriate report options, then click **Preview**.
5. On the reports toolbar, click **E-mail Report** .
6. Select the file format you want to email the file as.
7. An options window displays. The available options differ depending on your selection.
8. Select your settings, then click **OK**. Your default e-mail client opens with the report attached.

Exporting to Excel

When exporting to Excel through the Print to File option, the headings display on every page. When exporting to Excel from the View Data window, the headings display at the top of the first page.

1. In the reports window, select the report you want to export.
2. **Optional:** If the report is a Contributions or Financial Suite report, select the appropriate date range in the lower sidebar.
3. Click **Customize**.
4. Select the appropriate report options, then click **Preview**.
5. On the reports toolbar, click **Print Report** .
6. In the options window, select **Print to File**, then select the file **type** in the drop-down list.
7. To select the location where the file is saved, click **Browse** .
8. Navigate to the location and click **Save**.
9. Depending on the file type, another options window may display. Select your options and click **OK**.
10. Click **OK**.

Note

This option is only available on some reports.

1. In the reports window, select the report you want to export.
2. **Optional:** If the report is a Contributions or Financial Suite report, select the appropriate date range in the lower sidebar.
3. Click **Customize**.
4. Select the appropriate report options, then click **Preview**.
5. On the reports toolbar, click **View Report Data** .
6. Click the arrow beside **Export**, then select the file type.
7. Select the location to save the file and enter the **File Name**. Click **Save**.

Report Designer

Can't customize a report to suit your needs? Are you a technology enthusiast? If you answered "yes" to both of these questions, Report Designer may be right for you.

Report Designer lets you create customized reports from scratch. Report Designer provides powerful query and design functionality to help you create in-depth, professional reports. It also provides a way to organize your reports and leads you through the initial report-building steps.

If you are new to Report Designer, check out the overview and the learning tutorial. You can also select or search for a topic below.

Technical Expertise Required

Report Designer has awesome powers of customization, but the trade-off is a learning curve. Working with Report Designer requires a fair amount of technical knowledge.

If you find that Report Designer isn't the right tool for you, we also offer professional report customization for a fee. If you are interested, please contact Support.

Overview of Report Designer

With ACS Report Designer, you can

- **Save the Reports You Design** — Reports you create are associated with specific modules in Report Designer. Once you save a report, you can retrieve it, edit it, and save it with a new title.
- **Use ACS Advanced Exports to Specify the Data Source —** The Data Source options lets you create a new export to use with the report you are designing. Or, you can use an existing ACS Advanced Export as the data source. When you work with the report, you can edit the export and refresh the export's data.
- **Sort Data —** You can sort the data returned in the report based on the fields you select in Report Options.
- **Import and Export** — Report Designer includes import and export functionality so that you can share reports between organizations and send and receive reports from ACS Support.
- **Use the Query Wizard and Quick Design Tools** — Report Designer has a Query Wizard and Report Wizard to help you with data retrieval and report design. The Query Wizard walks you through selecting tables, fields, calculations, groupings, rows, and sort order. The query selections determine what data displays in your report.
- **Complete Learning Tutorials to Learn Report Designer** — Before you begin creating reports, set aside a day to complete the tutorial guide provided with the software. Completing the guide familiarizes you with many of the tools and concepts found in the Report Designer and is an excellent reference when building your own reports.

Report Designer Learning Resources

The Design Workspace of ACS Report Designer is provided by Digital Metaphor's software, Report Builder.

For detailed instruction on using Report Builder, see the Digital Metaphors help below. Please note that ACS uses Report Builder Enterprise version 10.09. These help links may be for different versions of Report Builder.

If you think you would benefit from personalized training with Report Designer, check out our training services, which are available at an additional cost.

Report Designer Tutorial Guide

Use the Report Designer tutorial guide to familiarize yourself with basic report building tasks and advanced report-building techniques. The guide is a series of tutorials that use a sample database to teach you how to create reports from start to finish. The tutorials begin with the basics, such as adjusting bands, and ends with advanced reporting techniques, like crosstab creation.

Set Aside a Day

Before you begin designing reports, set aside a day to complete the tutorials. Keep in mind that they build on one another, moving from basic concepts to complex reports. Therefore, it may be difficult to complete an advanced tutorial without having first completed earlier lessons. Each tutorial produces some kind of report using important aspects of Report Designer.

To use the Report Designer tutorial guide, download and install the setup file first.

1. Download the setup file.
2. Once it is downloaded, open the file.
3. Follow the instructions in the setup window.

When you finish installing the tutorial guide, you can being using it.

1. In the **ACS Report Designer Tutorial** folder, open the **Learn Report Designer Guide**.
2. Start reading. When it prompts you to try a task, open the **Learn Report Designer** file. This is a standalone version of Report Designer that includes sample data. Use it to complete the tutorial lessons.
3. If you need further instruction, open the **Learn Report Designer Help** file.

Additional Information

This tutorial guide is for an earlier version of Report Designer. Please keep in mind that the steps for accomplishing tasks, as described in the guide, may differ from the current version of ACS Report Designer. For help with design in the current version, see Designing Reports.

Report Designer Calculations Help

Report Application Pascal (RAP) is the programming language used for formula calculations in the Report Designer. The RAP user guide provides useful information on the functionality found on the designer's Calc workspace and on the **Calculations** menu option associated with the Variable report component.

Technical Expertise Required

This section contains programmer-level help. Although some of the information is not relevant for typical Report Designer users, the reference material is helpful when using the calculation features of Report Designer.

1. Download the RAP user guide.
2. Once the file is downloaded, open it.

Report Designer Workspaces

Report Designer contains four distinct workspaces with different tools for creating professional reports:

- The Design Workspace
- The Preview Workspace
- The Data Workspace
- The Calc Workspace

The Design Workspace

When you select **Design Reports**, Report Designer defaults to the Design workspace. This is where you spend the majority of your report-building time. The Design workspace is divided into two areas: the workbench and the canvas. The ***workbench*** is comprised of toolbars, component palettes, rulers, and other tools that you can use to manipulate the canvas. The ***canvas*** is the area that contains the report layout. This is where you place bands and components that ultimately control the content of each page of the report.

The canvas is made up of the header, detail, and footer bands. The header band displays at the top of each page of the report, the detail band makes up the body of the report, and the footer band displays at the bottom of each page of the report.

The Preview Workspace

The **Preview** tab plays an integral role in creating reports. It displays the report on the screen in its printed format. As your report develops, you can access the Preview workspace to see how it is shaping up. You can make changes and corrections based on the report's appearance. Using the tools in this workspace, you can view each page of the report or zoom in to get a better look at a specific page. You can also print the report in the Preview workspace.

The Data Workspace

Use the Data workspace to select and manipulate data for a given report. In most cases, you will not need to use the Data workspace because the Report Designer interfaces with ACS **Advanced Export** to select data for your report. You can use an existing Advanced Export or create a new one, depending on your reporting needs. This method of data selection simplifies the query process and makes it easier to select data without an in-depth knowledge of databases. Using ACS Advanced Export to select data eliminates the need to use the query functionality of the Data workspace when you are designing a report.

The Calc Workspace

Report Application Pascal (RAP) is the programming language used for formula calculations in the Report Designer. The RAP user guide provides useful information on the functionality found on the designer's Calc workspace and on the Calculations menu option associated with the Variable report component.

Creating Reports with Report Designer

You can open Report Designer in the ACS Reports window or in the ACS program menu.

1. Under **Searches and Reports**, click the **Reports** tab.
2. In the drop-down list, select **Report Designer**.
3. Click **Go** .

To open Report Designer in the ACS program menu, click **Start** > **All Programs** > **ACS Technologies** > **R eport Designer**.

After you have opened Report Designer, you can create a new report or modify a standard report.

Creating and Modifying Reports

Report Designer provides several pre-designed standard reports based on frequently used ACS reports. To quickly report your latest data, you can use these reports as they are. You can also modify a standard report and save it under a different name.

For a complete list of standard reports, see Available Report Designer Types. If the standard reports don't meet your needs, you can create a new report from scratch.

Whether you create a new report or modify an existing one, the process includes three overall steps:

1. Selecting a data source
2. Setting the data sort order
3. Designing the report

After you have customized a report, you can save it. If you've created and saved several new reports, you may want to organize them. You can also import a designed report or modify a report template that you saved previously.

Modifying a Standard Report

You can modify a standard report in Report Designer to better fit your organization's needs and save it under a different report name. Study the standard report thoroughly and determine what changes you need to make before accessing the report to make changes. This will save you time during the editing process and reduce the chance of error.

1. Under **Searches and Reports**, click the **Reports** tab.
2. In the drop-down list, select **Report Designer** and click **Go** .
3. In the upper sidebar, select **Contributions**, **Connections**, **People**, or **Organizations**.
4. In the **Reports** list, select the standard report.
5. In the lower sidebar, click **Customize**.
6. Modify the data source, sort order, and report design.

After you have modified the report, you can save it.

Creating a Data Source

The first step in creating a new report is selecting the data that it pulls. You can choose from several methods for retrieving report data:

- Create a Data Export — Interfaces with ACS **Advanced Export** in **Searches**. You can use the Data Export Designer to create a new data export for your report.
- Import an ACS Advanced Export — Imports an existing ACS **Advanced Export**.
- Create an Org Staff/Activities Extract — Pulls staff, activities, and other organization data from the Organizations module.
- Create a People Direct Datasource — Pulls People data from a specific dataset.

- Create a Financial Direct Datasource — Pulls Financial data from a specific dataset.

After you have selected the data source, you should set the data sort order.

Creating a Data Export

Uses the Advanced Export functionality in **Searches** to create a data export for your report.

1. On the **Report Options** tab, click **Get Report Data**.
2. Select **Create a Data Export**.
3. In the **Select Export Type** window, select one of the following:
    - **File Export** — This option enables you to create a single file containing selected export information. If you are unsure of which export type to choose, select this option.
    - **Database Export** — This option enables you to create multiple files that are linked by common fields.
4. Click **OK**. The ACS Data Export Designer displays.
5. **Optional:** Click **Description** to enter a description of the export.
6. On the **Groups** and **Fields** tabs, manage the options to your liking.
7. Click **Save & Close**. The export is generated automatically.
8. A message displays indicating that you can limit the number of records exported. Do one of the following:
    - To limit the number of records exported, enter the maximum number of records to export and then click **OK**. To export all records, click **OK**.

Importing an ACS Advanced Export

You can import an existing **Advanced Export** to retrieve data for your report.

1. On the **Report Options** tab, click **Get Report Data**.
2. Select **Import an ACS Advanced Export**.
3. Select the advanced export file.
4. Click **OK**.
5. A message displays indicating that you can limit the number of records exported. Do one of the following:
    - To limit the number of records exported, enter the maximum number of records to export and then click **OK**.
    - To export all records, click **OK**.

Creating an Org Staff/Activities Extract

You can extract **Organizations** data into Report Designer. You must have the Organizations module to use this option.

1. On the **Report Options** tab, click **Get Report Data**.
2. Select **Create an Org Staff/Activities Extract**.
3. Under **Date Selection**, select the **Effective Date**.
4. To include only active staff in the extract, select **Include Active Staff Only**. (Otherwise, both active and inactive staff are included.)
5. Under **Staff Phone/E-mail Settings**, select the data you want to export for:
   - Business Type
   - Mobile Type
   - Pager Type
   - Fax Type
   - E-mail Type
6. Under **Include Activity Groups**, select **Include All** to include all Activity Groups. Or, select only the Activity Groups you want to include.
7. Click **Save**.

Creating a People Direct Datasource

If you have more than one ACS **Financial Suite** dataset, you can select a specific dataset as your report data source. If have only one dataset, it is selected as the People Direct Datasource by default.

1. On the **Report Options** tab, click **Get Report Data**.
2. Select **Create a People Direct Datasource**.
3. To include archived datasets in your list of options, select **Include Archived Datasets**.
4. Select the dataset.
5. Click **OK**.

Creating a Financial Direct Datasource

If you have more than one ACS **People Suite** dataset, you can select a specific dataset as your report data source. If have only one dataset, it is selected as the Financial Direct Datasource by default.

1. On the **Report Options** tab, click **Get Report Data**.
2. Select **Create a Financial Direct Datasource**.
3. To include archived datasets in your list of options, select **Include Archived Datasets**.
4. Select the dataset.
5. Click **OK**.

Editing Data Export Options

Once a report is associated with a data source, you can edit the data export. For example, you may want to modify the data export of a standard or saved report.

> **Create Data Source First**
>
> The editing data options are only available when the report is already associated with a data source. The specific edit options available depend on the chosen data source. If the edit options are not available, you must create a data source first.

1. On the **Report Options** tab, click **Get Report Data**.
2. Select the edit option associated with the chosen data source.
3. When the Data Export Designer displays, make the changes to the export and click **Save & Close**.
4. A message displays indicating that you can limit the number of records exported. Do one of the following:
    - To limit the number of records exported, enter the maximum number of records to export and click **OK** to refresh the data.
    - To export all records, click **OK**.

Refreshing a Data Source

Once a report is associated with a data source, you can refresh the data for the report. This ensures that your reports contain the most recent data retrieved in the export.

Using the refresh option, you can also limit the number of records exported so you can work with a smaller subset of the data while designing your report. This decreases the time it takes to process data before you design the report. After you have finished the report design, you can then export all records.

You can refresh data at any time. When you create a data export, import a data export, or edit data export options, the program prompts you to refresh data. You may also be prompted to refresh data when you set the data sort order or click **Design Report**.

1. On the **Report Options** tab, click **Refresh Data**.
2. A message displays indicating that you can limit the number of records exported. Do one of the following:
    - To limit the number of records exported, enter the maximum number of records to export and click **OK** to refresh the data.
    - To export all records, click **OK**.

Setting the Data Sort Order

Once you have created the data source for your report, you can set the sort order of the data. Setting the sort order is especially important for reports that include vast amounts of data. It makes locating information within the report much easier.

When you set the data sort order, you select what fields to sort the report by. The first field in the list is the primary sort criteria: the data is sorted by this field first. You can choose additional fields to sort by, up to a max of 15.

For example, you generate a report of all the people in your dataset. Your first sort field is **Member Status**.
This is helpful because it sorts everyone into the status of member, visitor, contributor only, and so on. However, whether you have 80 or 8,000 members, you need further organization within these categories. So, you select **Last Name** as the second sort field. This way, the report is sorted first by member status, but the names within each status are also sorted by last name.

1. On the **Report Options** tab, click **Set Data Sort Order**.
2. In the **Available Fields** list, double-click the first field. It then displays in the **Sort Report by** list.
3. If you prefer, select another field to sort by. You can select a max of 15 fields.
4. To re-arrange the order of fields, click **Move Up** and **Move Down**.
5. To remove a field from the Sort by list, select it and click **Remove**.
6. You can specify whether the data is sorted in **Ascending** (A...Z, 1...10) or **Descending** (Z...A, 10... 1) order.
7. When you are finished, click **OK**.

Once you have set the data sort order, you can design the report.

Designing Reports

Once you have selected data for your report and set the sort order, you can design your report. You do this by creating a layout of objects that describe how the document will look.

1. On the **Report Options** tab, click **Design Report**.
2. A message displays indicating the last time the data was exported and gives an option to limit the number of records exported. Do one of the following:
   - To limit the number of records exported, enter the maximum number of records to export and click **Yes** to refresh the data.
   - To export all records and refresh the data, click **Yes**.
   - If you do not want to refresh the data, click **No**.

The Design Workspace opens.

Customizing the Page Setup in Report Designer

In Report Designer, you can customize the page setup to change your paper size and margins, print in portrait or landscape orientation, and choose the number of columns for your reports. These options are for both viewing and printing reports.

1. On the Report Designer menu, select the report.
2. Click **Customize** and select your Data Source and Report Options.
3. Click **Design Report** > **OK**.
4. Click **File** > **Page Setup**.
5. Select the **Paper** tab.
6. Select the **Printer Name**.
7. Select the **Paper Size**, and enter or select the **Width** and **Height**.
8. Select the **Paper Source**.
9. Click **OK**.

1. On the Report Designer menu, select the report.
2. Click **Customize** and select your Data Source and Report Options.
3. Click **Design Report** > **OK**.
4. Click **File** > **Page Setup**.
5. Select the **Margins** tab.
6. Under Margins, enter the values you want for each margin, or click the arrows to select these values.
7. Under Orientation, select **Portrait** or **Landscape**.
8. Click **OK**.

1. On the Report Designer menu, select the report.
2. Click **Customize** and select your Data Source and Report Options.
3. Click **Design Report** > **OK**.
4. Click **File** > **Page Setup**.
5. Select the **Columns** tab.
6. Enter the number of columns that you want, or click the arrows to increase or decrease the number of columns.
7. On the **Columns** tab, select additional options.
8. Click **OK**.

Combining Two Fields on a Report

For some reports, you may want to combine two ACS fields into one. For example, you may want to print names in First Name + Last Name format (for example, Jane Aaron). You can do this in Report Designer by using a **Variable** component. To do this, first create a sample report with your ACS data. Then, you can combine the first and last name fields.

1. Under **Searches and Reports**, click the **Reports** tab.
2. In the drop-down list, select **Report Designer** and click **Go**.
3. In the **Report Type** list, select the **People** report type, then select **Create a New Report**.
4. In the lower sidebar, click **Customize**.
5. Click **Get Report Data** > **Create a Data Export**.
6. In the Select Export Type window, select **Database Export** and then click **OK**. The ACS Data Export Designer window displays.
7. On the **Groups** tab, select **People**.
8. Click the **Included Data** tab and then select **Personal**.
9. Click **Save & Close**.
10. In the **Refresh Export** window, enter the number of records you want to limit the export to and then click **OK**.
11. On the **Report Options** tab, click **Design Report**.
12. In the **New Items** window, click **Cancel**.

1. In the design workspace, click **Variable**.
2. Click in the **Detail** band to place a **Variable** component in the report.
3. Right-click the **Variable** component and then select **Calculations...** .
4. In the **Code Toolbox: Data** section of the Calculations window, select **People**.
5. On the **Data** tab, click the **FirstName** field and drag it to the left area of the Calculations window.

The following text displays:
Value := People['FirstName']

6. Type a plus sign, an apostrophe, a blank space, an apostrophe, and a plus sign. The calculation should now look like this:
   Value := People['FirstName']+' '+
7. On the **Data** tab, click the **LastName** field and drag it to the left area of the Calculations window. The calculation should now look like this:
   Value := People['FirstName']+' '+ People['LastName']
8. Type a semicolon. The final calculation should look like this: Value := People['FirstName']+' '+ People['LastName']; 9. Right-click in the left area of the Calculations window.
10. Select **Compile**. At the bottom of the window, a message displays indicating any errors in calculation.
11. To return to the design workspace, click **OK**.
12. To check your calculation, click the **Preview** tab. The names on the report should look like this:

Creating a Cover Page for a Report

When you create a report for formal presentation, you may want to add a cover page to introduce your report.

1. In the design workspace, on the **Report** menu, select **Title**.
2. Increase the height of the title band by dragging the divider down until the guide reaches the 9.5 inch mark on the vertical ruler.
3. Place the components you need to design your cover page in the **Title** band.
4. Design the cover page.

Creating a Tabular Report

When you create a tabular report in Report Designer, labels display across the page and data displays down the page.

1. In the design workspace, on the **Report** menu, select **Data Tree**.
2. On the **Data Tree**, click the **Layout** tab.
3. In the **Style** list, select **Tabular**.

Creating a Vertical Report

When you create a vertical report in Report Designer, labels display down the page and data displays across the page.

1. In the design workspace, on the **Report** menu, select **Data Tree**.
2. On the **Data Tree**, click the **Layout** tab.
3. In the **Style** list, select **Vertical**.

Creating Labels in Report Designer

You can use the Label Templates wizard in Report Designer to create labels and other items such as name tags.

1. In the design workspace, on the **File** menu, select **New**.
2. In the **New Items** window, select **Label Templates**.
3. Click **OK**.
4. In the **Label Templates** window, select the appropriate printer and label information.
5. Click **OK**.
6. Add the desired information to the label in the design workspace.

Entering Additional Field Descriptions in Report Designer

Your additional lists, fields, and dates are used to print the Individual Request for Information – Blank and Individual Request for Information with Data reports. Because the lists, fields, and dates are unique for each organization, the labels on the reports are not automatically inserted. You must edit the labels on these reports for the appropriate information to display.

Once you have a list of your additional data, you can enter the descriptions in the report labels.

1. Under **Manage Records**, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go**.
3. Select a record and then click **View/Edit**.
4. Click the **Additional Fields** tab.
5. Click the **Family** tab.
6. Print this screen or write down the field names.

> **Note**
>
> Make sure you copy the field names in the exact order that they appear, including any fields labeled **No t Defined**. The fields appear in the same order on the Individual Request for Information reports, so you need to keep them in the appropriate order to know which field is which.

7. Click **Close**.

1. Open Report Designer,
2. Select the specific Individual Request for Information report.

3. In the lower sidebar, click **Customize**.
4. On the **Report Options** tab, click **Design Report**.
5. The additional fields, lists, and dates are labeled **Open Category**, **Open Field**, or **Open Date**. Click the first label to select it.
6. Enter the label for the additional field in the **Set Value** box located on the toolbar.

   > **Useful Information**
   >
   > If any of your additional fields, lists, or dates are **Not Defined**, you can make the label and blank next to it visible by right-clicking the component and clearing the **Visible** option.

7. Repeat step 4 for each additional field, list, and date on the report.

Inserting an Image in Report Designer

When designing a report, you can insert images. You can insert images from your computer, such as your church's logo, and you can also insert family and individual photos from the ACS database.

1. In the design workspace, on the **Standard Components** toolbar, click **Image** .
2. Place the **Image** component in the appropriate position in the **Detail** band.
3. Right-click the **Image** component and select **Picture...** .
4. Select the image file you want to include from the appropriate directory.
5. Click **Open**.

1. On the **Design** tab, click **RDDBImage** .
2. Place the field in the location that you want in the **Detail** band.
3. From the **Data Field** drop-down list, select the picture type that you want to include.
4. Right-click the picture field, then select **MaintainAspectRatio**.
5. Right-click the picture field then select **Stretch**.

Report Bands

When you create a Report Designer report, you do a significant amount of work in the canvas. The canvas is divided into sections called bands. A band is labeled in the section divider immediately below it; thus, the first band is called the Header, the second is called the Detail, and the third is called the Footer. When the report generates, the bands are printed on different parts of the page.

The bands available for use when creating a report are:

- **Header** — Components placed in the header band print at the top of each page of the report.
- **Detail** — Components placed in the detail band make up the body of the report.
- **Footer** — Components placed in the footer band print at the bottom of each page of the report.
- **Title** — Components placed in the title band print at the beginning of the report, displayed as a title.
  Summary — Components placed in the summary band print at the end of the report, such as a total record count or total amount.
- **Page Style** — A page style can be designed just like a report band, but it generates as a background to the bands of the report. Page Styles are used to produce forms.
- **Group Header** — Components placed in a group header band print at the beginning of a group of information.

- **Group Footer —** Components placed in the group footer band print at the end of a group of information.

Adjusting Report Bands

The bands of your report can be adjusted to accommodate the size of larger components, or additional components, as necessary. For example, if you want to increase the height of the header band to accommodate a large logo or table title, you can do so using the ruler on the left side of the Design workspace.

1. Place your cursor on the divider label for the band to adjust. For example, if you want to adjust the **Header** band, place the cursor over the Header divider label. The cursor changes to an up/down arrow, indicating that you can drag the divider up and down.
2. Hold down the left mouse button and drag the divider up and down to adjust the size.

> **Useful Information**
>
> Notice the two lines that display on the vertical ruler to the left of the divider. These lines are called "guides" because they represent the new position of the divider.

Report Components

A report component is an element used to control how a report looks. Each component has a unique purpose. There are four types of components used in Report Designer:

- Standard Components
- Data Components
- Advanced Components
- Check Box Components

Standard Components

The **Standard Components** in Report Designer are the components that are most frequently used to build reports. The standard report components include items such as labels, memo, and images. These components do not retrieve data from your database to display. Rather, you assign the content that a standard component displays when you are creating the report.

Data Components

The data components in Report Designer are similar to the standard components. The difference is that data components are data-aware, meaning that they have the ability to read the value of a field from a database table and then display that value in the report. You associate a data-aware component with a database table and field by selecting the data pipeline and the data field from drop-down lists in the edit toolbar.

Advanced Components

The advanced components help you with complex reporting requirements. You can create regions, subreports, and crosstabs using advanced components. See Advanced Component Selection.

Check Box Components

CheckBox components in Report Designer are components that can be used to place marked or unmarked check boxes in a customized report. CheckBox components help you to avoid having to manually draw your check boxes, and can be used in a variety of ways. You can use CheckBox components to display a constant marked or unmarked value in your report. You can also configure CheckBox components to retrieve data and display as marked or unmarked in your report based upon the selected Boolean value. The two types of CheckBox components available in Report Designer are CheckBox and DBCheckBox.

CheckBox

You can use the CheckBox component to display either a constant checked value or an empty check box on your report. For example, if you wanted to create a basic group list for an activity or event to determine which individuals would be willing to participate, you could place an unchecked CheckBox beside each of the individual records on your report and then mark each of the participating individuals as they sign up. Once you have placed a CheckBox component on your report, you can use the Edit toolbar to select the type of checkbox that you want and right-click the CheckBox component to access the Checked speed menu option.

DBCheckBox

You can use the DBCheckBox component to read the value of a field from a database and display a checked or unchecked box based upon the values you select on the Checkbox Settings window. Once you have placed a DBCheckBox component on your report, you can use the Edit toolbar to set the data pipeline and select a data field for the check box.

Advanced Component Selection

When you are using a shape component as a background for a band, you need to use specific techniques to select multiple components while using a bounding box in front of that background shape. The bounding box method described in the Basic Component Selection topic does not apply when you use a component as a background.

1. Hold down the **Ctrl** key.
2. Click on the white space to the left of the first component.
3. Hold down the left mouse button.
4. Drag the mouse until the box encloses all the components.

When you release the mouse, all of the components are selected. Notice that the background component is also selected.

1. Hold down the **Shift** key.
2. Click the component. Click in the white space of another band. Or, click a deselected component.

Aligning Components

When you are designing a report, there are components that must be aligned with each other. For example, if you are using three labels in your Header, you may want to align them by the top or bottom of the component boxes. You may also want to left-align each label component with its corresponding DBText component.

To align components

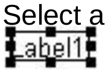
1. Select one of the components to align and adjust its position appropriately.
2. Press and hold the **Shift** key.
3. Select the other components.
4. Release the **Shift** key. Notice that all of the components stay selected.
5. Click the appropriate alignment icon for the type of alignment you want to perform. For example, if you are aligning your label components at the top of each label component box, click **Align Top** .

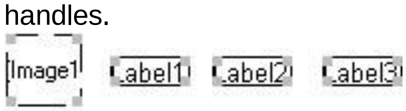
All selected components are aligned with the first component.

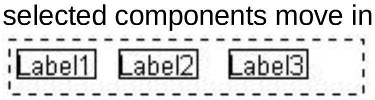
Basic Component Selection

Once the components of your report are created, you need to carefully position them to create a highquality report. To position components, you need to understand component selection in Report Designer.

Here are some tips for selecting components in Report Designer.

- Select a component by clicking it. The selected component should look like this:
  

- To select additional components, hold down the Shift key and then click the other components. All of the additional components, and the original component, should now be selected. You can tell that they are selected by the small gray boxes surrounding each component. These boxes are called selection handles.
  

- You can select multiple components using a bounding box. To select components using a bounding box, click in the white space to the left of the first component, hold down the left mouse button, and drag the mouse until the box encloses all the components. When you release the mouse, all the components are selected. If you place your cursor over one of the components and drag it in any direction, all the selected components move in unison. This is called a component selection.
  

- Click in the white space of any design band to deselect components.

Bolding Text in Components

1. Select the component(s) you want to display in bold type. Small gray boxes, called selection handles, display around each component to indicate that it is selected.
2. Click **Bold** . All selected components display in bold type.

> **Tip**
>
> To bold multiple components at once, press and hold the **Shift** key while selecting the components.

Configuring a DBCheckBox Component

You can configure a **DBCheckBox** component to retrieve data and display as marked or unmarked in your report based upon the selected Boolean value.

To configure a DBCheckBox Component

1. On the **Data Component** workspace toolbar, click **DBCheckBox** .
2. Click the white space of the **Detail** band to place a **DBCheckBox** component in the detail band.
3. Notice that there are two drop-down lists in the upper left corner of the Design workspace. The dropdown list on the left, the **Data Field** list, contains the fields selected from the data sets. The drop-down list on the right, the **Data Pipeline Name** list, contains the data sets from which you selected data in the Advanced Export.
4. In the Data Field list, select the data field for the **DBCheckBox** component. The first field value displays in the **DBCheckBox** component.
5. In the Data Pipeline Name list, select the data set of the field you want to select for the **DBCheckBox** component.
6. Right-click the **DBCheckBox** component to access the Speed Menu.
7. Click **Settings**. The Check Box Settings window displays.
8. Select a **Style** for the check box.
9. Enter the **Boolean True** and **Boolean False** values that you want.
10. Click **OK**.

Creating a DBText Component

A **DBText** component displays data from a database field you selected in the **Advanced Export** used for the report. DBText components cannot handle rich text or images.

To create a DBText component

1. On the **Design** workspace toolbar, click **DBText** .
2. Click the white space of the **Detail** band to place a **DBText** component in the detail band.
   Notice that there are two drop-down lists in the upper left corner of the Design workspace. The dropdown list on the left, the **Data Field** list, contains the fields selected from the data sets. The drop-down list on the right, the **Data Pipeline Name** list, contains the data sets from which you selected data in the Advanced Export.

3. In the **Data Field** list, select the field for the **DBText** component. The first field value displays in the **DB Text** component.
4. In the **Data Pipeline Name** list, select the data set of the field you want to select for the **DBText** component.

> **Tip**
>
> To see the names of these lists, place the cursor over the field. A tool tip displays the name of the list.

Front-to-Back Order

In Report Designer, you can use a shape component to create a background for other components. To do this, you need to establish the correct front-to-back order for components. Front-to-back order refers to the order components are presented in when they overlap. When you are creating a background for a report band, you need to position it behind the other components in the band, or "send it to the back." To access the available options for ordering a component, simply right-click the component.

Placing and Naming Label Components

A label is a component in the Standard Component Palette that functions as a header for another kind of component, such as a DBText component. Labels are placed in the header band of the Design workspace so they print on each page of the report. Proper label naming is important in making your report columns easy to follow.

To place and name a label in the Design workspace

1. On the **Standard Components** toolbar, click **Label** .
2. Click the white space of the header band to create a label.
3. Locate the **Edit** toolbar (below the label component icon on the toolbar). It should contain the text 'Label1', which is the caption of the currently selected label.
4. Select the text in the edit toolbar and enter the label name.
5. Repeat steps 1 through 4 to create additional labels for your report.

Positioning Components

Once you have added a component in the design workspace, you can adjust the position of the component box to better format your report.

To adjust the position of a component

1. Right-click the component and select **Position...**
2. Set the appropriate **Left** position, **Top** position, **Width**, and **Height** of the component.
3. Click **Apply**.
4. Click **OK**.

Tip

Use the vertical and horizontal rulers to position components. If the rulers are not visible, in the **View** menu, select **Rulers**. When a component is selected, you can view the measurements of the component in the lower right side of the status bar.

Sizing Components

To achieve the best format for reports, you need to resize components. You can make components larger or smaller, depending on the area you want to use in the report band and what is displayed in the component.

To size a component

1. Make sure all components are deselected: click in the white space of any report band.
2. Select the component.
3. When the component is selected, small black boxes (called sizing handles) display around the box outline. Place the cursor over the appropriate sizing handle. The cursor becomes a double-arrow. Hold down the left mouse button and drag the cursor to a new size.

Tip

Use the guides on the vertical and horizontal rulers to determine the position and size of the component. You can also adjust the size of a component by selecting it, holding down the Shift key, and pressing the arrow keys. (Use this method to size multiple component selections.

Sizing a Component Stretched to ParentHeight and ParentWidth

When you have a shape stretched using ParentWidth and ParentHeight, you cannot change the size using the sizing handles.

To size a component stretched to ParentHeight and ParentWidth

1. Select the component.
2. Right-click the component and select **ParentHeight**. The **ParentHeight** option is cleared.
3. Right-click the component and select **ParentWidth**. The **ParentWidth** option is cleared.
4. Use the sizing handles to modify the size of the shape.

Stretchable Components

The **DBMemo** is a special class of component called a "stretchable." As the report prints, stretchable components increase or decrease in height based on their content. This differs from static components, which always print with the same height. When a band contains both static and stretchable components, it is difficult to get the printed pages of a report to look exactly right because stretchable components print at a height that is different from the one given in the report layout. The following properties can help you keep your reports looking good when you use stretchables.

Using a Shape as a Background

If you want to add color to your report, you can use a shape as a background for a report band.

> **Useful Information**
>
> While working through this procedure, any components you have in the report band you are working in will be hidden behind the shape component. They are not deleted; when you complete the procedure, the components will move in front of the background component.

To use a shape as a background

1. On the **Design** workspace toolbar, click **Shape** .
2. Click in the report band you want to give a background.
3. Right-click the **Shape** component you created and select **ParentHeight**. The height of the component stretches to the height of the band.
4. Right-click the component and select **ParentWidth**. The width of the component stretches to the width of the band.
5. On the **Draw** toolbar, click the **Fill Color** arrow .
6. Select the color to use as the background for the band.
7. Right-click the component and select **Send to Back**.

Report Designer Groups

A group is a section of a report that contains a group header, detail, and group footer band. It includes records that have a common value for a field that you have selected to group your data by. For example, if you select Member Status to group your data by, the reported data displays in groups under each member status.

When working with groups, you should understand these three important concepts:

- Data Traversal and Groups
- Groups and Sorting Data
- Creating Groups

Data Traversal and Groups

Data Traversal

A report is generated based on a database table. A database table is a collection of data organized into columns and rows. A report document (the pages you see in the print preview window) is created when the report generates a detail band for each row in the database table. The act of moving from one row in the table to the next is called data traversal. Data traversal can have a dramatic effect on how the report document is generated, especially in the case of groups.

Groups

Report groups are represented in the layout by a matched pair of bands: the group header and group footer. The group header prints when the group begins; the group footer prints when the group has ended. For example, let's say you want to see the orders received by a business, organized by each month of the year. You would first create a data selection sorted by month, then you'd create a group based on the 'month' field.

Groups and Sorting Data

Groups

When you create groups, you assign them to a field. As the report generates, the group tracks the value of the assigned field. If the field value changes when the report moves from one row of the database table to the next, then the current group ends (the group footer prints) and the next group begins (the group header prints). Group headers always print at the beginning of a report - in order to start the first group - and group footers always print at the end of the report - in order to finish the last group.

Sorting Data

Groups let you organize the report into sets of rows that share a common value. However, groups can only function if the field they're assigned to has been used to sort the data. If you associate a group with a field, but do not sort the data by that field, the group will function. That is, the group will generate a group footer and group header each time the field value changes, but because the data is not sorted properly, the group appears to generate at random. Whenever you see a group generating too many times, make sure the data is sorted properly.

Creating Groups

When designing a report, you can create groups that group data based on the value of a specified field. For groups to work properly, you must set the sort order for your data by the field you want to group by.

Make sure that your data source includes the field you want to group by, and that you sort the data by the field you want to group by.

1. On the Design Workspace Report menu, select **Groups**.
2. In the **Groups** list, select the field you want to use to group data. Note:Make sure you select a field that you are using to sort your data.
3. Click **Add**.
4. In the **Break On** section, select **Data Field**.
5. To start a new page each time the group value changes, in the **On Group Change** section, select **Start new page**.
6. To have the page numbering start over for each group, select **Reset page number**.
7. To reprint the header information for each group, select **Reprint group headers on subsequent pages**.
8. Click **OK**.
9. Add the appropriate components to your group header and footer.

Report Designer Regions

A region is a special type of component that can contain other components. You can associate a set of informational components with a single stretching component (such as a memo) in a band using a region. By placing components in a region that is associated with a stretching component, you can ensure that components keep their appropriate placements and that stretchable components do not hide them.

The region component moves relative to the stretching component. You place other components in a region by dragging them into it. When you resize or move a region, the components inside the region shift to accommodate the changes in the region.

When layouts contain multiple stretching components, and other related components are not printing in the correct positions, you can often fix this by using regions to logically group components, then assigning the **S hiftRelativeTo** property to associate regions with the appropriate stretching component.

When designing a report, you can use a region to associate a set of informational components with a single stretching component in a band.

1. On the **Advanced Component** toolbar, click **Region** .
2. In the **Detail** band, click in the area where you want to insert a region.
3. Use the sizing handles to size the region appropriately.
4. Select the components you want in the region; drag and drop them into the region area.

Report Designer Speed Menus

The speed menu displays when you right-click a component. It offers different options for altering the overall look of your component via changes in shape, size, and visibility. The speed menu varies slightly for different components.

Useful Information

When you open a speed menu, it applies only to the component you right-clicked, regardless of any components you have selected.

Report Designer Toolbars

Report Designer has several toolbars, component palettes, and data trees to help you design a report:

- Nudge Toolbar
- Size Toolbar
- Draw Toolbar
- Align or Space Toolbar
- Standard Component Palette
- Data Component Palette
- Advanced Component Palette
- Report Tree
- Data Tree
- Standard Toolbar
- Format Toolbar
- Edit Toolbar

To view a list of all toolbars in Report Designer, on the **View** menu, select **Toolbars**. Or, right-click over the gray area of the workbench.

Nudge Toolbar

Use this toolbar when you want to move a component or selection of components with extreme precision. Each icon represents the direction the selection will move. Selections move one pixel each time you press an arrow key.

Button	**Function**
Nudge Up	Moves all selected components up one pixel.
Nudge Down	Moves all selected components down one pixel.
Nudge Left	Moves all selected components one pixel to the left.
Nudge Right	Moves all selected components one pixel to the right.

Size Toolbar

Use the Size toolbar to set all of the components within a selection to a uniform height or width.

Button	Function
Shrink Width to Smallest	Determines the minimum width of all selected components, then sets the width of the components to that value.
Grow Width to Largest	Determines the maximum width of all selected components, then sets the width of the components to that value.
Shrink Height to Smallest	Determines the minimum height of all selected components, then sets the height of the components to that value.
Grow Height to Largest	Determines the maximum height of all selected components, then sets the height of the components to that value.

Draw Toolbar

Use the Draw toolbar to set the color and style used by shape, line, and region components.

Button	Function
Fill Color	Sets the color for a shape or region.
Line Color	Sets the color of the border for shapes and regions. Sets the color for a line.
Line Thickness	Determines the thickness of a line. Applies to line components only.
Line Style	Sets the style of a line.

Align or Space Toolbar

The **Align** or **Space** toolbar is useful when components need to be positioned uniformly. For example, you can use it to align several components so that the tops are all even, or you can space components so that they have an equal amount of space between them. The first component selected determines the position to which the others align.

Button	Function
Align Left	Aligns a group of components with the leftmost position of the component selected first.
Align Middle	Centers a group of components based on the horizontal center of the component selected first.
Align Right Edges	Aligns a group of components with the rightmost position of the component selected first.
Align Top	Aligns a group of components with the topmost position of the component selected first.
Align Center	Aligns a group of components based on the vertical center of the component selected first.
Align Bottom	Aligns a group of components with the bottommost position of the component selected first.
Space Horizontally	Spaces a set of components based on the leftmost position of the component selected first and the rightmost position of the component selected last.
Space Vertically	Spaces a set of components based on the topmost position of the component selected first and the bottommost position of the component selected last.
Center Horizontally in Band	Centers a component horizontally within a band.
Center Vertically in Band	Centers a component vertically within a band.

Standard Component Palette

The icons on the Standard Component Palette represent components that are frequently used to build reports. To create a component, click an icon and then click in a band.

Button	Function
Select Object	Selects one or more components within the layout. Also clears any selection (by clicking in the white space of a band).
Label	Displays text. Use the edit toolbar to set the caption of a label.
Memo	Prints multiple lines of plain text in a report.
Rich Text	Prints formatted text.
System Variable	Displays common report information such as page number, page count, print date and time, and current date and time.
Variable	Performs calculations.
Image	Displays graphics such as bitmaps, GIFs, and JPEGs.
Shape	Displays various shapes, such as squares, rectangles, circles, and ellipses. Use the **Edit** toolbar to set the shape type.
Line	Displays a line. Use the **Edit** toolbar to set the line orientation.
Bar Code	Renders barcodes. Use the **Edit** toolbar to set the data to be encoded. Right-click and select Configure to select bar code types.
ACS Variable	Inserts the name of the report you are designing if you are using a pre-designed ACS report. If you are creating a new report, inserts the text "ACS Report Designer Report."
CheckBox	Displays a **Check Box** component. Use the **Edit** toolbar to select the type of check box that you want. Right-click and select **Checked** to change the marked or unmarked value.

Data Component Palette

This palette offers several components that are identical to ones in the standard palette, except for one thing: they are data-aware.

Data-aware components have the ability to read the value of a field from a database table, and then display that value in the report. This is different from the standard components, which display the content assigned when you lay out a report. You associate a data-aware component with a given database table and field by selecting the data pipeline and the data field from the drop-down lists in the edit toolbar.

Button	Function
DBText	Displays data from most types of database fields. Cannot handle images or rich text.
DBMemo	Prints plain text from a memo field of a database table. It automatically word-wraps the text.
DBRichText	Prints formatted text from a memo field. It automatically word-wraps the text.
DBCalc	Performs simple database calculations (Sum, Min, Max, Average, Count).
RDDBImage	Prints graphics (Bitmaps, GIFs, JPEGs) that are stored in a database field. For example, individual and family photos.
DBBarCode	Converts the data from a database field to a barcode symbol.
DBCheckBox	Displays a Check Box component for the selected database field. Right-click and select **Settings** to define the style and Boolean values for the check box.

Advanced Component Palette

The Advanced Component Palette contains components that can help you tackle complex reporting requirements.

Button	Function
Region	Logically groups components together.
Sub Report	Handles multiple master details, creates side-by-side reporting effects, and hooks reports together as one.
CrossTab	Allows you to generate a set of calculations that summarize the data from a database table. It displays the calculations in a grid format.

Report Tree

Use the Report Tree to view the components within each band. Components you select in the Report Tree become the selection in the report layout. You can select multiple components by holding down the **Ctrl** key and clicking on each name. You can rename components by right-clicking over the name, selecting **Re name**, and then typing in a new name. Make sure to press the **Enter** key after renaming to ensure that the new name is assigned.

This tool window is dockable only on the left and right sides of the design workspace.

Data Tree

Use the Data Tree to create data-aware components within a band. Simply select a set of fields and drag the selection into the band. A set of corresponding data-aware components is created. This tool window is dockable only on the left and right sides of the design workspace.

Area	Function
Data List	Shows all of the data pipelines in the data workspace. Data pipelines represent a database table or SQL query and provide a set of data structured as records and fields.
Field List	Shows the fields for the currently selected data pipeline.
Data Tab	Shows what data is available for the report.
Layout Tab	Allows you to control the format of the components created when you drag fields from the Data Tree into the layout.

Standard Toolbar

Use the **Standard** toolbar to perform basic functions such as opening, saving, and printing reports, as well as cutting and pasting selections.

Button	Function
New	Creates a blank report.
Open	Displays the Open dialog used to open an existing report.
Save	Saves a report to file.
Page Setup	Displays the Page Setup dialog used to set the paper size and configure the layout for the report.
Print	Displays the Print dialog before sending the report to the printer.
Print Preview	Displays the Print Preview window.
Cut	Places the currently selected components in the clipboard and removes them from the report layout.
Copy	Copies the currently selected components into the clipboard.
Paste	Pastes the components in the clipboard into the report layout.

Format Toolbar

Use the **Format** toolbar to set the font and colors of text-based components. You can also control the layering of components with this toolbar.

Button	Function
Font	Shows the name of the font chosen for the selected component.
Font Size	Shows the size of the font chosen for the selected component.
Bold	Sets text to bold.
Italic	Sets text to italic.
Underline	Underlines text.
Left Justify	Left justifies text.
Center	Centers text.
Right Justify	Right justifies text.
Font Color	Sets the text color.
Highlight Color	Sets the background color.
Bring to Front	Brings a component to the front of other components.
Send to Back	Sends a component to the back of the other components. Use the Report Tree to see the exact layering of the components within the band.

Edit Toolbar

The **Edit** toolbar changes based on the selected component. You can use it with the following components:

- data-aware components
- labels
- shapes
- lines

Report Quick Design Tools

The Report Designer offers tools to assist you with some of the more difficult report-building processes. These tools are:

- Query Wizard
- Query Designer
- Report Wizard
- Label Templates
- ACS Report Templates
- CrossTab Wizard

Query Wizard

The **Query Wizard** is a tool that you can use to access information from your database to use in a report. The **Query Wizard** is accessed from the Data workspace by selecting **File | New**, and then double-clicking **Query Wizard**. Follow the instructions given on each window of the **Query Wizard** to select data.

The **Data** workspace can be used to select and manipulate data for a given report. In most cases, you will not need to use the Data workspace when you work in the Report Designer because the Report Designer interfaces with ACS **Advanced Export** to select data for your report. You can use an existing **Advanced Export** or create a new one, depending on your reporting needs. This method of data selection simplifies the query process and makes it easier to select data without an in-depth knowledge of databases. Using ACS **Advanced Export** to select data eliminates the need to use the query functionality of the **Data** workspace when you are designing your report.

Query Designer

The **Query Designer** is used to modify query-based dataviews. The **Query Designer** presents a series of notebook tabs; each tab represents a different part of the query. You can use the **Query Designer** to add or remove search criteria from your query.

The **Data** workspace can be used to select and manipulate data for a given report. In most cases, you will not need to use the **Data** workspace when you work in the Report Designer because the Report Designer interfaces with ACS **Advanced Export** to select data for your report. You can use an existing **Advanced Export** or create a new one, depending on your reporting needs. This method of data selection simplifies the query process and makes it easier to select data without an in-depth knowledge of databases. Using ACS **Advanced Export** to select data eliminates the need to use the query functionality of the **Data** workspace when you are designing your report.

Report Wizard

The **Report Wizard** is accessed from the **File | New** menu of the Design workspace. A series of windows is presented, each requesting information about the report. When the last page is reached, you can select either a preview or design option. When you click **Finish**, the report is created and displayed as requested.

Label Templates

The **Label Templates** wizard is accessed from the **File | New** menu of the **Design** workspace. The Label Template window displays requesting information about the labels you want to print. You can select the type of labels to print on the **Products** section of this window. Select the appropriate printer and product information and click **OK** to work with a label template.

ACS Report Templates

ACS has provided a report template that you can use when you are designing a new report. The template includes a Header band with the date, time, church name, and page number. When you select the ACS Report Template, the Design workspace is accessed with the template in place.

CrossTab Wizard

The CrossTab Wizard is accessed from the **File | New** menu of the Design workspace. A series of windows is presented, each requesting information about the report data and the crosstab layout you want to use. When the last page is reached, either a preview or design option can be selected. When you click **Finish**, a report is created and displayed as requested.

Suppressing a Blank Line in Report Designer

On some reports, you may want to keep lines from printing when there is no data in a field. For example, if you print a report that includes the names and addresses for mailing labels, you may not want a blank line to print for each address that does not include an Address Line 2. You can suppress the printing of a blank line using **DBMemo** components and the **ShiftRelativeTo**... option.

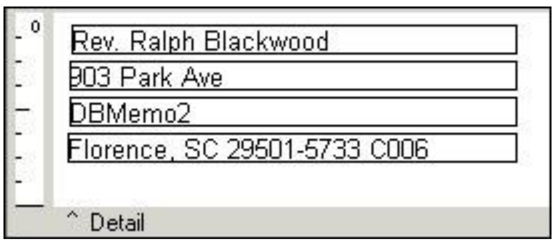
The following procedures walk you through creating a sample report and suppressing Address Line 2 when the field is blank.

1. Under **Searches and Reports**, click the **Reports** tab.
2. In the drop-down list, select **Report Designer** and click **Go** .
3. In the **Report Type** list, select the **People** report type, then select **Create a New Report**.
4. In the lower sidebar, click **Customize**.
5. Click **Get Report Data** > **Create a Data Export**.
6. In the Select Export Type window, select **Database Export** and then click **OK**. The ACS Data Export Designer window displays.
7. On the **Groups** tab, select **People**.
8. Click on the **Included Data** tab, select **Personal**, then click **Save & Close**.
9. In the **Refresh Export** window, enter the number of records you want to limit the export to and then click **OK**.
10. On the **Report Options** tab, click **Design Report**.
11. In the **New Items** window, click **Cancel**.

Now you can select the name and address fields for the sample report.

1. In the design workspace, resize the Detail band to one inch high.
2. Click **DBText** .
3. Click in the **Detail** band to place a **DBText** component in the report.
4. In the **Data Field** list, select **IndividualLabelName**.
5. Click **DBMemo** .
6. Click in the **Detail** band to place a **DBMemo** component in the report.
7. Size the **DBMemo** component to the same height as the **DBText** component.
8. In the **Data Field** list, select **Address1**.
9. Place another **DBMemo** component in the report. In the **Data Field** list, select **Address2**.
10. Place a third **DBMemo** component in the report. In the **Data Field** list, select **CityStateZipFormatted**.
11. Place these fields one below the other, spaced evenly, and align them at the left edge.

The Detail band of your report should look similar to this:



If your **Address2** field contains the text **DBMemo2**, the first record in your export file does not have data in the **Address Line 2** field.

Click the **Preview** tab to preview the report. Addresses that do not have data in **Address Line 2** display a blank line where that data would be. The report should look similar to this:

Now you can suppress the blank lines in the addresses

1. In the design workspace, right-click the **DBMemo3** component, which contains the **CityStateZIPFormatted** field.
2. Select **ShiftRelativeTo...**.
3. In the **Set object position based on** list, select **DBMemo2**
4. Click OK.
5. Right-click the **DBMemo2** component, which contains the **Address2** field.
6. Select **ShiftRelativeTo...**.
7. In the **Set object position based on** list, select **DBMemo1**
8. Click **OK**.

Click the **Preview** tab to preview the report. The blank line is now removed in addresses that do not have data in **Address Line 2**. The report should look similar to this:


Mrs. Margaret Blackwood
903 Park Ave
Florence, SC 29501-5733 C006

Mr. Carl Abel, Sr
976 W Marion St
Florence, SC 29501-2134 C010

Mr. Bronson Wilson, III
14 Stadium Drive
PO Box 778
Florence, SC 29503-0778 B306

Useful Information

Suppressing blank lines only works when you have components placed vertically. You cannot remove blank horizontal spaces by suppressing components with no data.

Saving Designed Reports

When you create a new report using Report Designer, you can save it to use again.

To avoid a long list of reports that are difficult to distinguish from one another, you can organize reports into their types.

Before you create a new report, in the upper sidebar of the reports window, select the type of report you are creating. For example, Attendance or Contributions. Then, select **Create a New Report** and click **Customize**. This ensures that the new report is listed under the report type you selected.

For example, you want to create a custom Balance Sheet of your assets and liabilities. This is an example of a General Ledger report. To save this report under the proper type, double-click **General Ledger** before selecting **Create a New Report**. When you save the report, it is located under General Ledger in the reports window.

1. Once you have designed the report, close the ACS Report Designer window.
2. In the People Suite Reports window, click **Preview**.
3. In the preview window, on the reports toolbar, click **Save**.
4. Enter a new name for the report.
5. To make the report available to other ACS users, select **Public**.
6. Click **Save**.

Saving Report Designer Templates

If you create a report layout that you want to use for other reports, you can save it as a report template. For example, if you have several reports you want to use a similar Header for, you can save the header and open it through ACS Templates.

1. Create the report layout in the ACS Report Designer.
2. Click **File**, then click **Save As Report Template**.
3. In the Save As Report Template window, enter the **Template Name**.
4. Select a **Category** for the template. To add a new category, enter the new category name in this field.
5. Click **Save**.

1. Access the ACS Report Designer.
2. Click the **Design** tab.
3. Click **File**, then **New**.
4. In the New Items dialog box, select **ACS Report Templates**.
5. Click the tab that corresponds with the category the template is saved in.
6. Select the template and then click **OK**.

Importing and Exporting Designed Reports

Report Designer lets you import reports created by another user. When you import the report, all settings, including the associated data export settings, also import. Once the file is imported, you can open it in Report Designer for use or modification.

Note

You can only import reports that have been successfully exported from Report Designer.

If you try to import a report file that hasn't been exported, a message displays indicating that the report file (.rtm) does not contain a valid version number.

1. Under **Searches and Reports**, click the **Reports** tab.

2. In the drop-down list, select **Report Designer** and click **Go**.
3. In the upper sidebar, select **Create a New Report**.
4. In the lower sidebar, click **Customize**.
5. On the **Report Options** tab, under **Design the Report**, click **Import Report**.
6. Navigate to the report and click **Open**.

7. A message displays indicating the last time the exported data was refreshed and gives an option to limit the number of records exported. Do one of the following:
   To export all data and refresh it, click **Yes**.
   To limit the number of records exported, enter the maximum number of records to export and click **Yes**.
   To refresh the data or limit the number of records exported, click **No**.

1. Under **Searches and Reports**, click the **Reports** tab.
2. In the drop-down list, select **Report Designer** and click **Go**.
3. In the upper sidebar, select the report.
4. In the lower sidebar, click **Customize**.
5. On the **Report Options** tab, under **Design the Report**, click **Export Report**.
6. Navigate to the location where you want to save the report.
7. Click **Save**.

The report is exported to the selected location.

Updating and Deleting Saved Reports

In Report Maintenance, you can delete, transfer or make a user's saved reports public.

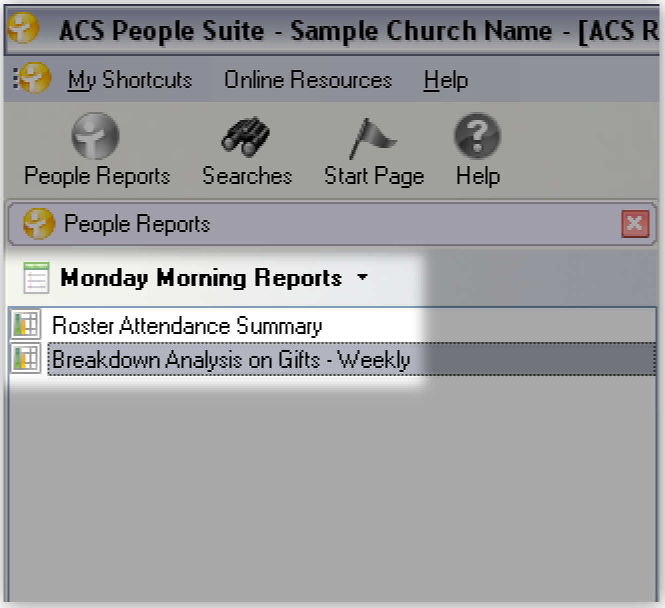
For example, an employee may leave suddenly and no one may have his password. If you'll continue using these reports, you can transfer them to another user. If you won't use these reports, you can delete them to clean up the list.

1. In the reports window, click **Maintenance**.
2. In the **User** drop-down list, select the ACS user whose reports you want to delete, make public, or transfer.
3. Select the action (**Delete**, **Make Public**, or **Transfer to**). If you select **Transfer to**, select the ACS user who gains access to the reports. If you remove or transfer reports, you must remove or transfer all of the ACS user's reports- you cannot select which ones to remove or transfer.
4. Click **OK**.

Customizing the Reports Window

In ACS, you can create customized **views** of the reports window. Creating customized views lets you decide what reports display. This is helpful because you only see the reports you want to, rather than a complete list of every report associated with a module. You can select to display reports from any ACS module your organization uses. You can also delete a report view if you no longer need it.

For example, you might set up a report view called **Monday Morning Reports**. In this view, you would include all of the reports that you regular run on Monday mornings, such as the Roster Attendance Summary and Breakdown Analysis on Gifts - Weekly. When you select the Monday Morning Reports view, only these two reports display.



1. In the upper sidebar of the reports window, click the **Down Arrow** beside the module you are currently viewing.
2. Click **Define Views**, then click **New**.
3. Enter a **Name** for the customized view.
4. To select the reports you want to include, select **Selected Reports** and click **Select**. The Select Reports window displays.
5. Select a report you want to include and click **Add**.
6. Repeat these steps for each report you want to include in the view, then click **OK**.
7. To display the customized view now, click **Apply View**.

You can select this customized view at any time by clicking the **Down Arrow** beside the report area you are currently viewing.

1. In the upper sidebar of the reports window, click the **Down Arrow** beside the module you are currently viewing.
2. Click **Define Views**.
3. Select the report view you want to delete, then click **Delete**.
4. When the confirmation message displays, click **Yes**.

In ACS Financial Suite, you can print all reports in a report view.

1. Under **Generate Reports**, select the **Reports** tab.
2. Select a module name, then click **Go**.

3. In the upper sidebar of the Reports window, select the report view you want to print reports for in the drop-down list. The reports in the view display.
4. In the lower sidebar, beside **Batch Processing**, click **Preview All** to display all reports, or **Print All** to print the reports.