



BarAlliance

Reports

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MODULE REPORTS

Module Reports allows you to access reports from all modules.

Select Module

To select a report, you must first choose a module from the dropdown list as shown below in Fig. rep1.

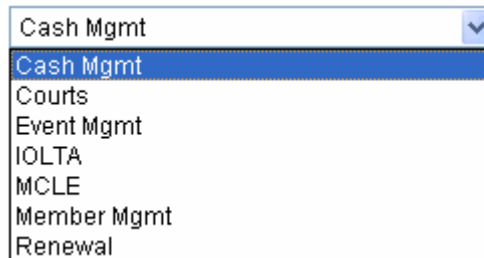


Fig. rep1

For example, select Cash Mgmt from the list. You will see that the box immediately below the dropdown list is immediately populated with all reports within the selected module.

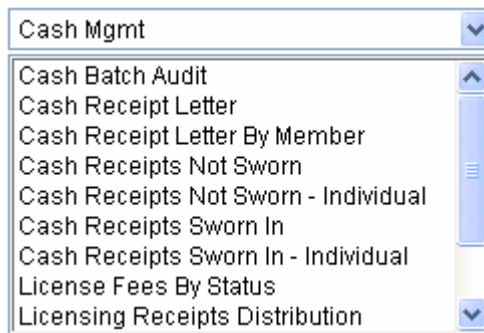


Fig. rep2

REPORTS

View Report

To view a report, click on the report you want to see. For example, if you wanted to view the Cash Batch Audit report, click on that title in the list.

Cash Mgmt Batch

- Cash Batch Audit
- Cash Receipt Letter
- Cash Receipt Letter By Member
- Cash Receipts Not Sworn
- Cash Receipts Not Sworn - Individual
- Cash Receipts Sworn In
- Cash Receipts Sworn In - Individual
- License Fees By Status
- Licensing Receipts Distribution

Displays details per Batch number.

All Pages

Pages To

Fig. rep3

As you can see, along with a brief description of the report, any parameters that are required to run the report will be displayed. If you know that you want to see an audit of Batch 999, enter 999 into the textbox labeled **Batch** and hit the **Enter** key or click on the **Show Report** button.

You will be presented with a message asking if you would like to open or save the file. Click on the Open button to immediately open and view the report.

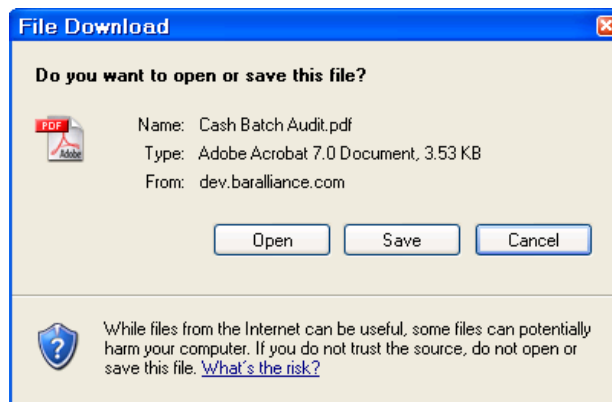


Fig. rep4

The report will then be displayed in a PDF or CSV format.

*Utah State Bar
Cash Receipts Audit
Tuesday, September 27, 2005*

Batch Number: 999		Date Entered: 12/3/1993		Amount: \$1,100.00			
Type of Entry: Events		Date Deposited: 12/3/1993		Entered By: Sharadee Fleming			
Ctrl No.	Ck No.	Mem ID	Payment is For . . .	Payee	Ck Total	Indiv Total	Notes
19341	5064148	00913	HAWKINS, D. MARK M.	PETER K. ELLISON	\$100.00	\$100.00	
19342	1893	01919	KENNEDY, WENDY C.	KENNETH R. MADSEN	\$50.00	\$50.00	
19343	1033	05011	HARTILL, MATTHEW W.	PHILLIP KENT CARD	\$50.00	\$50.00	
19344	2762	03157	URBOM, DAN C J.	JOHN WALSH	\$50.00	\$50.00	
19345	1212	00265	PASSEY, MICHAEL T C.	INTECH ONE-EIGHTY CORP	\$100.00	\$100.00	
19346	114508	00506	STONE, DAVID	CALLISTER, DUNCAN	\$50.00	\$50.00	
19348	4437	00607	BEASLIN, DOUGLAS D.	ADKINS & CHRISTIANSEN	\$50.00	\$50.00	
19349	754	00688	LORI D CRUCES, DAVID F.	JAMES P. COWLEY	\$100.00	\$100.00	
19350	85483	03798	JENSEN, M. SCOTT W.	HERITAGE SAVINGS BANK	\$100.00	\$100.00	
19351	35056	00306	HOUCHINS, R.	MCKAY, BURTON	\$100.00	\$100.00	
19352	1032	05011	HARTILL, MATTHEW W.	PHILLIP KENT CARD	\$100.00	\$100.00	
19355	5740	00612	WALKER, DAVID H.	BLAISDELL & CHURCH	\$100.00	\$100.00	
					<u>\$1,100.00</u>	<u>\$1,100.00</u>	

Fig. rep5

Note: If the title of the report begins ‘CSV’, that report will be displayed in an Excel format.

Select Pages

You can choose to display the entire report at once or you can display it within page ranges. The default is **All Pages**.

All Pages
 Pages To

Fig. rep6

To view a report within a page range, select **Pages**. For example, if you know a report is going to be very large, and you only want to display 50 pages at a time, select Pages and enter 1 in the first textbox and 50 in the second textbox as shown below in Fig. rep7. Click on the **Show Report** button. The next page range would begin with 51 and so on.

All Pages
 Pages To

Fig. rep7

CUSTOM REPORTS

The Custom Reports section allows you to construct your own customized reports ‘on-the-fly.’

Steps: **1**...2...3

Next



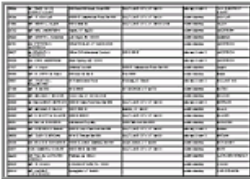
Instructions

1. Select the category and layout for the report **OR** select a saved report
2. Click on the Next button

Select Category & Layout

Category:

Layout:

 (Table Layout)	 (Labels Layout)	 (CSV Layout)
--	---	--

Select Saved Report

Batches By Type

Delete Saved Report

Next

Fig. rep8

Select Category & Layout

The first step in creating a custom report is to select the Category (Module) from the dropdown list as shown below in Fig. rep9.

Category:

- Cash
- Event
- MCLE
- Member

Fig. rep9

The next step is to pick the layout. Initially there are 3 layouts to choose from: Table Layout, Labels Layout and CSV Layout. See Fig. rep10.

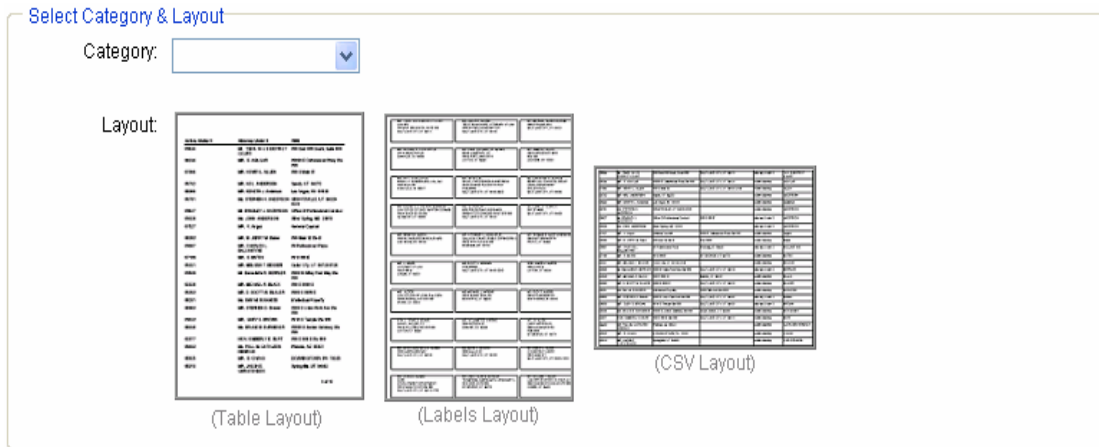


Fig. rep10

An additional layout, Letter Layout, is provided when the Member category is chosen. See Fig. rep11.

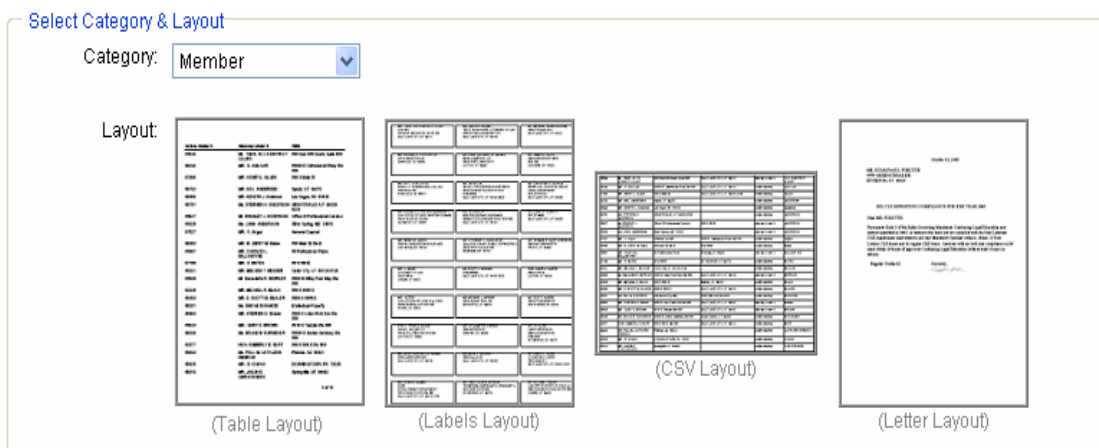


Fig. rep11

Create Table Report

To create a report using the Table Layout, select the Category and Table Layout, then click on the **Next** button in the top or bottom right as shown below in Fig. rep12.

Steps: 1...2...3

Next

Instructions

1. Select the category and layout for the report **OR** select a saved report
2. Click on the Next button

Select Category & Layout

Category: Cash

Layout:

- (Table Layout)
- (Labels Layout)
- (CSV Layout)

Select Saved Report

Batches By Type

Delete Saved Report

Next

Fig. rep12

Note: The Next button will not be available unless both a category and a layout are chosen. The selected layout will have a blue border.

Step 2 will then be displayed as shown in Fig. rep13.

Steps: [1](#)...[2](#)...[3](#)

Next

Instructions

1. Select the fields for the report
2. Select filter parameters (if any) for the report
3. Click on the Next button

NOTE: Do not select the same field more than once.

Select Fields

(Header)

(Group By)

(Order By)

Add Column

Select Filters

AND

Next

Fig. rep13

As you can see, the Table Layout offers a report Header, a Group By option, four columns by default (the first determines the order of the results) and Filter options.

Note: All fields do not have to be selected, however at least one field must be selected to continue to Step 3.

REPORTS

As an example, let's create a report grouped on Batch Type, that displays both Batch IDs and the Batch Totals.

(Header) [dropdown]

(Group By) [Batch Type]

(Order By) [Batch ID] [Batch Total] [] []

[Add Column]

Fig. rep14

Notice that three of the available fields were left blank. You could also add Number of Payment Items (# Pymnt Items) and Number of Controls (# Ctrl's). If you want to another more columns, click on the **Add Column** button. For this example, add another column and select Disbursed Status.

(Header) [dropdown]

(Group By) [Batch Type]

(Order By) [Batch ID] [Batch Total] [# Pymnt Items] [# Ctrl's] [Disbursed Status]

[Add Column]

Fig. rep15

To take it one step further, what if you only wanted this information for Admissions batches? In the Select Filters section select Batch Type in the second dropdown list, select = in the third dropdown list, and enter admissions in the textbox as shown below in Fig. rep16.

Select Fields

(Header) [dropdown]

(Group By) [Batch Type]

(Order By) [Batch ID] [Batch Total] [# Pymnt Items] [# Ctrl's] [Disbursed Status]

[Add Column]

Select Filters

AND [dropdown] [Batch Type] [=] [dropdown] [admissions]

AND [dropdown] [dropdown] [dropdown]

Fig. rep16

Finally, click on the **Next** button in the top or bottom right. While the report is being created you will see the message shown below in Fig. rep17.



Fig. rep 17

When the report has finished rendering, you will see a preview image of the first page displayed. Notice that the results are ordered by the Batch ID, which is the first column. All table reports will be ordered by the first column.

Steps: [1](#)... [2](#)... [3](#)

<u>BATCH ID</u>	<u>BATCH TOTAL</u>	<u># PYMT ITEMS</u>	<u># CTRLS</u>	<u>DISBURSED STATUS</u>
223	\$4,590.00	26	26	NOT DISBURSED
224	\$14,800.00	54	54	NOT DISBURSED
530	\$5,130.00	19	20	NOT DISBURSED
531	\$3,540.00	15	15	NOT DISBURSED
532	\$6,190.00	24	24	NOT DISBURSED
533	\$10,155.00	34	34	NOT DISBURSED
534	\$6,210.00	25	25	NOT DISBURSED
535	\$5,630.00	26	26	NOT DISBURSED
536	\$10,230.00	36	36	NOT DISBURSED
537	\$1,080.00	4	4	NOT DISBURSED
549	\$270.00	1	1	NOT DISBURSED
577	\$270.00	1	1	NOT DISBURSED
582	\$270.00	0	0	NOT DISBURSED
602	\$165.00	7	7	NOT DISBURSED
629	\$530.00	2	2	NOT DISBURSED
632	\$130.00	1	1	NOT DISBURSED
649	\$5,250.00	29	29	NOT DISBURSED
650	\$6,460.00	30	30	NOT DISBURSED
651	\$8,170.00	26	27	NOT DISBURSED
674	\$260.00	2	2	NOT DISBURSED
7025	\$3,495.00	6	6	NOT DISBURSED
7026	\$10,460.00	17	17	NOT DISBURSED
7027	\$1,650.00	3	3	NOT DISBURSED
7040	\$7,845.00	10	10	NOT DISBURSED
7041	\$4,410.00	10	10	NOT DISBURSED
7045	\$1,500.00	2	2	NOT DISBURSED
7046	\$2,625.00	4	4	NOT DISBURSED
7049	\$7,335.00	15	15	NOT DISBURSED
7050	\$7,915.00	10	10	NOT DISBURSED
7051	\$1,715.00	2	2	NOT DISBURSED
7052	\$2,620.00	3	3	NOT DISBURSED
7069	\$2,585.00	5	5	NOT DISBURSED
7086	\$415.00	2	2	NOT DISBURSED
7087	\$625.00	1	1	NOT DISBURSED
7090	\$3,240.00	15	15	NOT DISBURSED

Download Save New

Fig. rep18

Note: If the preview appears blank the report has been run but had no returns.

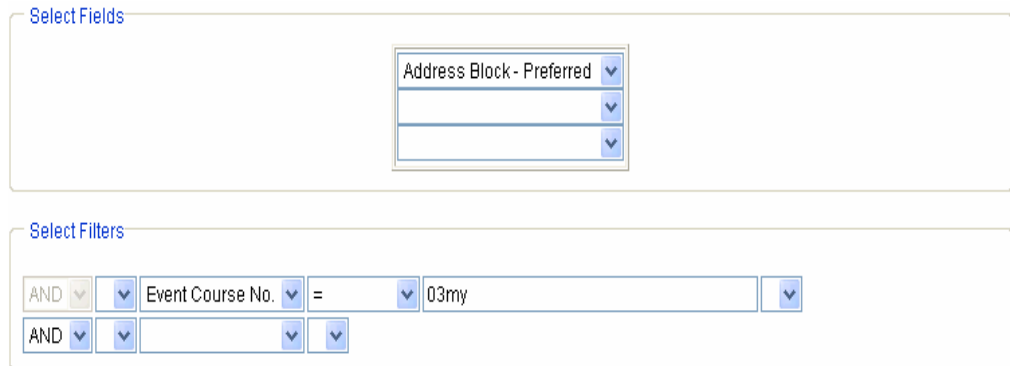
At this point you can elect to **Download** the report (to save on your computer), **Save** the report to the database or return to Step 1 and create a **New** report.

Create Labels Report

To create a report using the Labels Layout, select the Category and Labels Layout, then click on the **Next** button in the top or bottom.

REPORTS

For example, if you want to create mailing labels for registrants of an event with the course number 03my, choose the event category and the labels layout. Click on the Next button. You can then select from the registrant's Business, Personal, PO Box or Preferred mailing address by choosing the appropriate 'Address Block' from the dropdown list and set the filter 'Course Number = 03my' as shown in Fig. rep20



The screenshot shows two sections: 'Select Fields' and 'Select Filters'. In the 'Select Fields' section, there is a dropdown menu with 'Address Block - Preferred' selected. In the 'Select Filters' section, there are two filter rows. The first row has 'AND' selected, a dropdown menu, 'Event Course No.' selected, an equals sign, a dropdown menu, and '03my' in a text box. The second row has 'AND' selected, a dropdown menu, and two empty dropdown menus.

Fig. rep19

Note: All fields do not have to be selected, however at least one field must be selected to continue to Step 3.

Click on the **Next** button. While the report is being created you will see the message shown below in Fig. rep20.



Fig. rep 20

When the report has finished rendering, you will see a preview image of the first page displayed as one column as shown in Fig. rep22, but will print to fit Avery labels, number 5160 as shown in Fig. rep23.

Steps: [1...](#) [2...](#) [3](#)

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Fig. rep21

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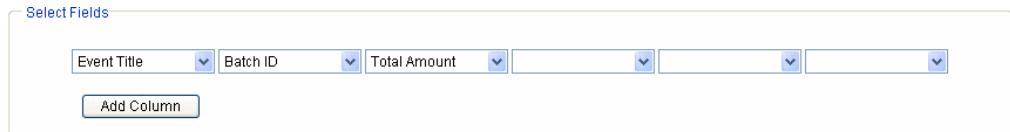
Fig. rep22

REPORTS

Create CSV Report

To create a report using the CSV Layout, select the Category and CSV Layout, then click on the **Next** button in the top or bottom.

For example, select the Event category and then the CSLV Layout. Click on the **Next** button. To see how much money an event generated, make the selections shown in Fig. rep23. If you want to another more columns, click on the **Add Column** button. Click on the **Next** button.



Select Fields

Event Title | Batch ID | Total Amount | | | |

Add Column

Fig. rep23

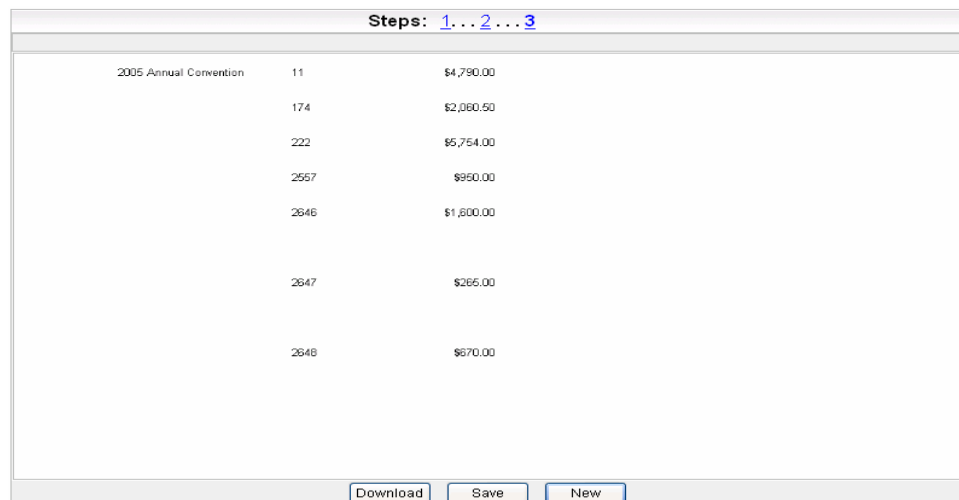
Note: All fields do not have to be selected, however at least one field must be selected to continue to Step 3.

While the report is being created you will see the message shown below in Fig. rep24.



Fig. rep 24

When the report has rendered, a preview image of the first page displayed.



Steps: 1... 2... 3		
2005 Annual Convention	11	\$4,790.00
	174	\$2,060.50
	222	\$5,754.00
	2557	\$950.00
	2646	\$1,800.00
	2647	\$265.00
	2648	\$670.00

Download Save New

Fig. rep25

Create Letter Report

To create a report using the Letter Layout, select the Member category and Letter Layout, then click on the **Next** button in the top or bottom.

Select Fields

Enter Date Here

Address Block

RE: Enter Subject Line Here

Dear Member Name:

Enter Text Here

Sincerely,

Select Filters

AND

Fig. rep26

NOTE: The Letter Layout has been designed to automatically populate the member’s name and preferred mailingaddress.

Enter the date to appear on the letter in the uppermost textbox, the subject of the letter in the middle textbox and the actual text of the letter in the bottom textbox. Click on the **Next** button.

While the report is being created you will see the message shown below in Fig. rep27.



Fig. rep 27

When the report has rendered, a preview image of the first page displayed.

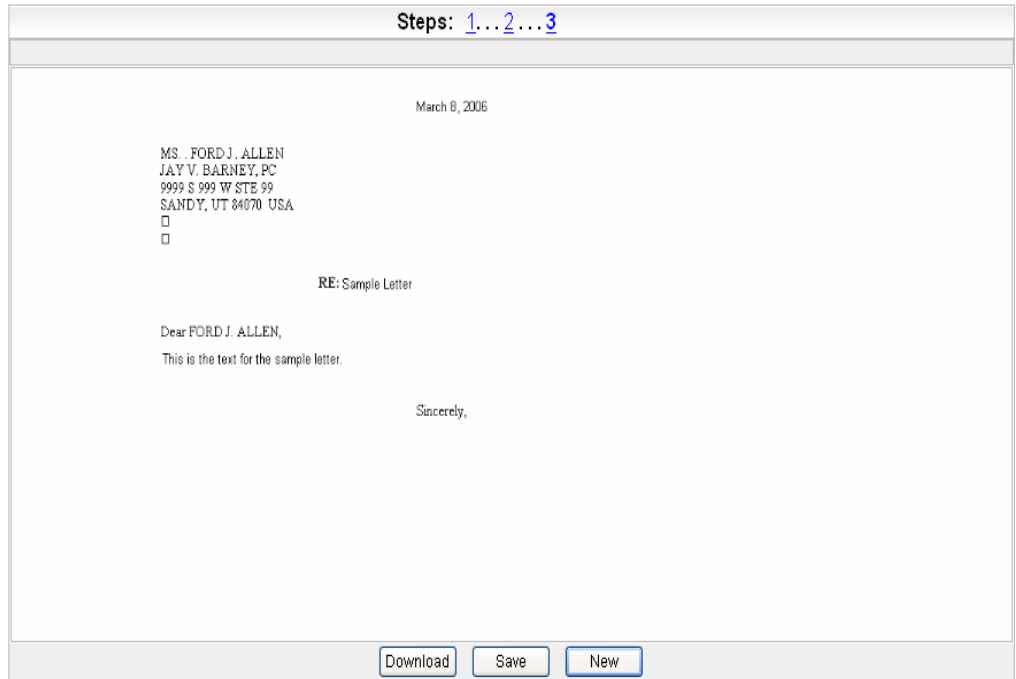


Fig. rep28

Download

To download a report to your computer, click on the **Download** button. You will then be prompted to select how much of the report to download. All Pages is the default selection. Click on the **OK** button.

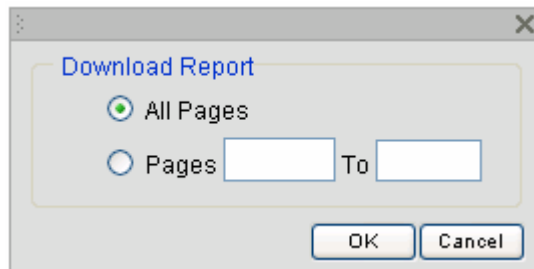


Fig. rep29

At this point you will be asked to either open the report, or save it to your computer as shown in Fig. rep30.

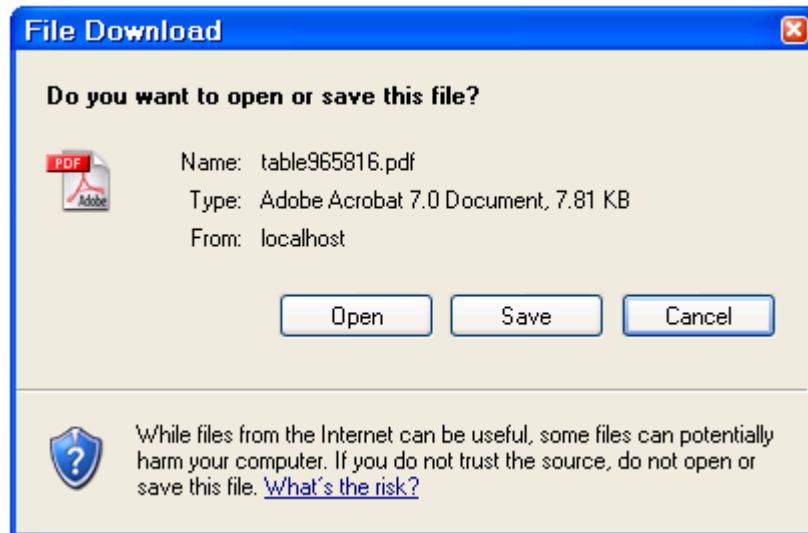


Fig. rep30

If you choose to save the report, click on the **Save** button. You will be prompted to select the location for the report and the name. For this example title the report 'Admissions Batches' and save it to your desktop as shown in Fig. rep31. Click on the Save button. The report is now saved to your desktop.

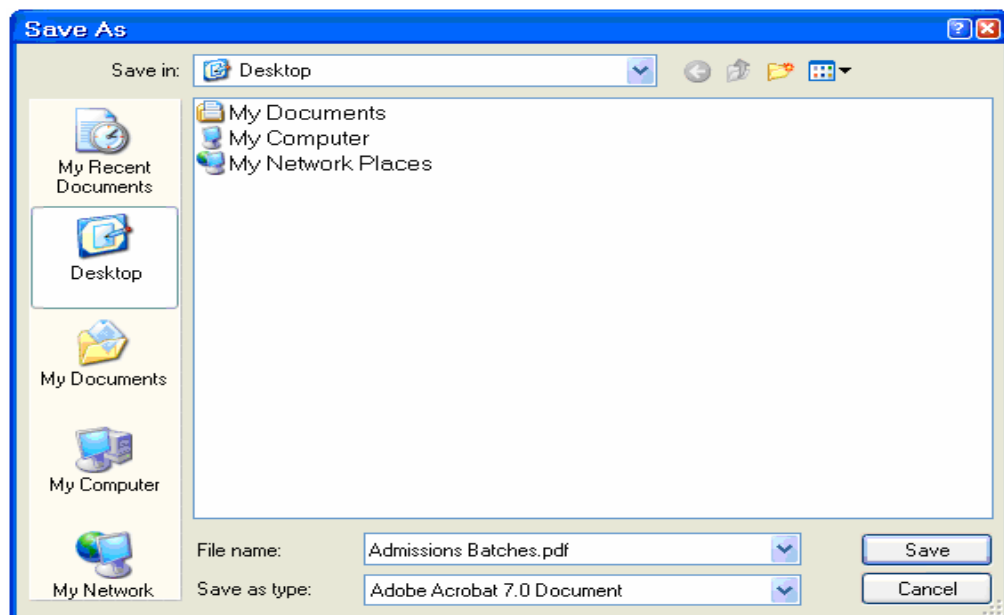


Fig. rep31

REPORTS

If you choose to open the report instead of immediately saving it to your computer, click the **Open** button as shown in Fig. rep32. The report will be displayed as a PDF document.

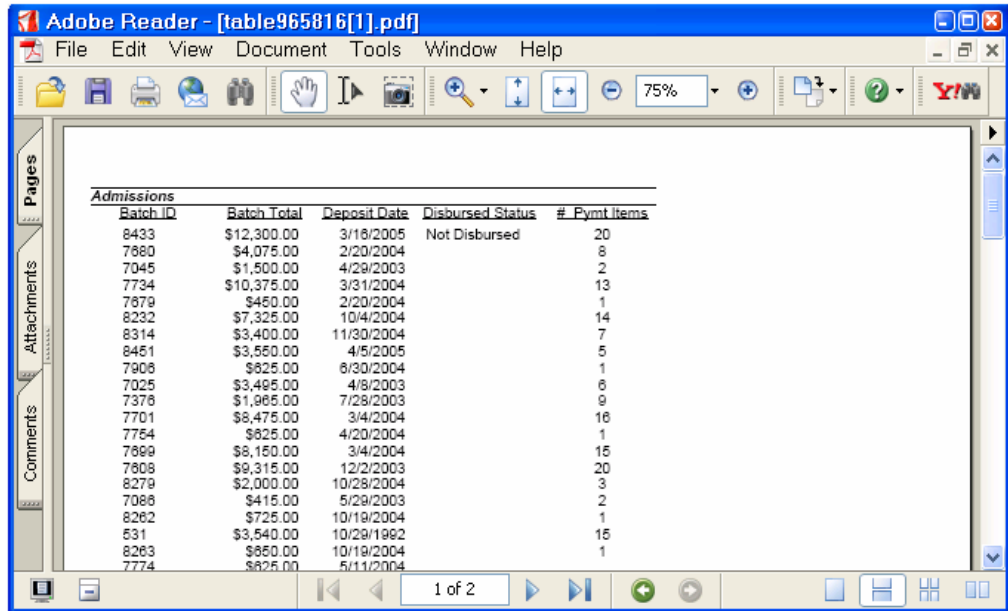


Fig. rep32

Save

To save the report to the database, click on the **Save** button. You will be prompted to name the report. Enter 'Admissions Batches' in the textbox as shown below in Fig. rep33.

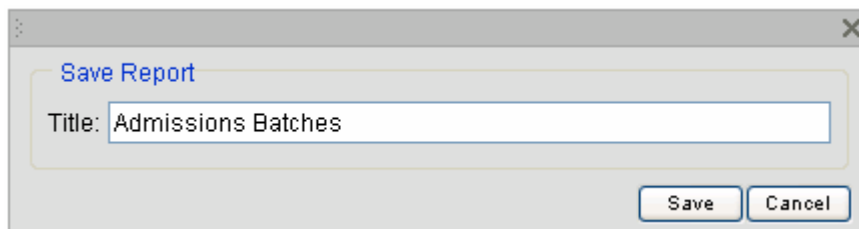


Fig. rep33

Click on the **Save** button. You will receive the message shown in Fig. rep34.



Fig. rep34

Click on the **New** button to start a new report. You will see your newly saved report is now in the list as shown in Fig. rep35.

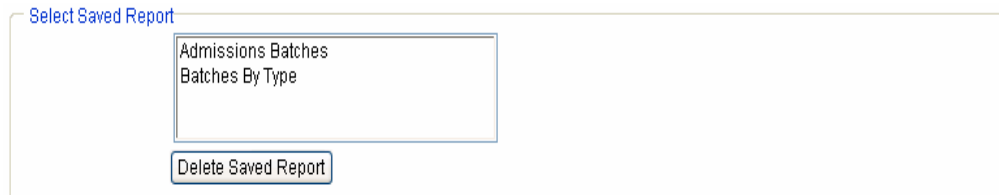


Fig. rep35

Filter

Filtering a report allows you to narrow your report criteria.

For example, if you wanted to create mailing labels, but only for registrants of the event with the course number '05am', select the Event category, Labels layout and click the Next button.

Select 'Address Block' in the first dropdown list in the Select Fields section and in the Select Filters section, select Course Number = 05am as shown in Fig. rep36.

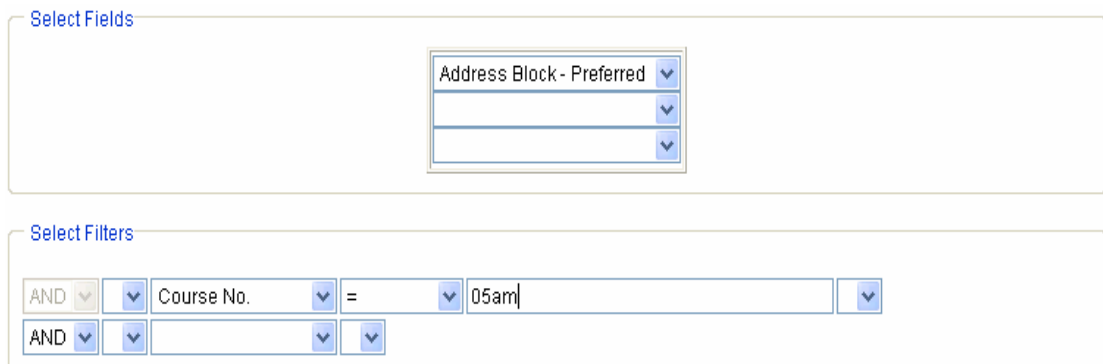


Fig. rep36

REPORTS

Select Saved Report

To use open a previously saved report, click on that report in the list in the **Select Saved Report** section. Click on the **Next** button.

Fig. rep37

As you can see in Fig. rep38, the selections made when the report was originally created have been saved.

Fig. rep38

At this point you can make any alterations you want, if any, and click on the **Next** button. Once the report has rendered, you can choose to **Download** or **Save** the newly run version of the report just as if you had started from scratch.

Steps: [1](#)... [2](#)... [3](#)

ADMISSIONS				
BATCH ID	BATCH TOTAL	# PYMT ITEMS	# CTRLS	DISBURSED STATUS
223	\$4,590.00	26	26	NOT DISBURSED
224	\$14,800.00	54	54	NOT DISBURSED
530	\$5,130.00	19	20	NOT DISBURSED
531	\$3,540.00	15	15	NOT DISBURSED
532	\$6,190.00	24	24	NOT DISBURSED
533	\$10,155.00	34	34	NOT DISBURSED
534	\$6,210.00	25	25	NOT DISBURSED
535	\$6,630.00	26	26	NOT DISBURSED
536	\$10,230.00	36	36	NOT DISBURSED
537	\$1,080.00	4	4	NOT DISBURSED
549	\$270.00	1	1	NOT DISBURSED
577	\$270.00	1	1	NOT DISBURSED
582	\$270.00	0	0	NOT DISBURSED
602	\$165.00	7	7	NOT DISBURSED
629	\$630.00	2	2	NOT DISBURSED
632	\$130.00	1	1	NOT DISBURSED
649	\$6,260.00	29	29	NOT DISBURSED
660	\$6,460.00	30	30	NOT DISBURSED
651	\$8,170.00	26	27	NOT DISBURSED
674	\$280.00	2	2	NOT DISBURSED
7025	\$3,495.00	6	6	NOT DISBURSED
7026	\$10,460.00	17	17	NOT DISBURSED
7027	\$1,650.00	3	3	NOT DISBURSED
7040	\$7,645.00	10	10	NOT DISBURSED
7041	\$4,410.00	10	10	NOT DISBURSED
7045	\$1,500.00	2	2	NOT DISBURSED
7046	\$2,625.00	4	4	NOT DISBURSED
7049	\$7,335.00	15	15	NOT DISBURSED
7050	\$7,915.00	10	10	NOT DISBURSED
7051	\$1,715.00	2	2	NOT DISBURSED
7052	\$2,620.00	3	3	NOT DISBURSED
7069	\$2,565.00	5	5	NOT DISBURSED
7036	\$415.00	2	2	NOT DISBURSED
7037	\$625.00	1	1	NOT DISBURSED
7090	\$3,240.00	15	15	NOT DISBURSED

Download Save New

Fig. rep39

Delete Saved Report

To delete a saved report, select the report in the list and click on the **Delete Saved Report** button. The report will immediately be removed from the list.