Printing Reports, Labels & Charts User Guide
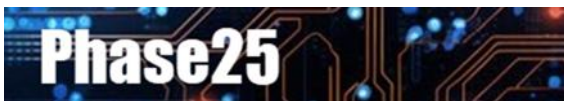
Version 8 – January 2025

Small Business Software Built with Enterprise DNA

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Phase 25 Printing Guide

Overview

This guide is a resource for users of all Phase25 software products, Version 8.x.

For additional information, click on Main Menu >> User Guides to open our Support site. All user guides and video tutorials are FREE!

The Reports, Labels, Charts & Views Dialog

Every page and worksheet in your application has a toolbar at the top, with a **Print** button, which opens the **Reports, Labels, Charts & Views** dialog. Each tab on this form describes the options available for the data you enter in the system.

The Reports Tab

Each application has specific reports designed to display the data in multiple formats. Depending on the purpose of the report, each report is marked whether it should be run from just the current record the user has on the screen at the time, or if it's displaying data from multiple records (summary reports).

See the image below which describes both of these options:
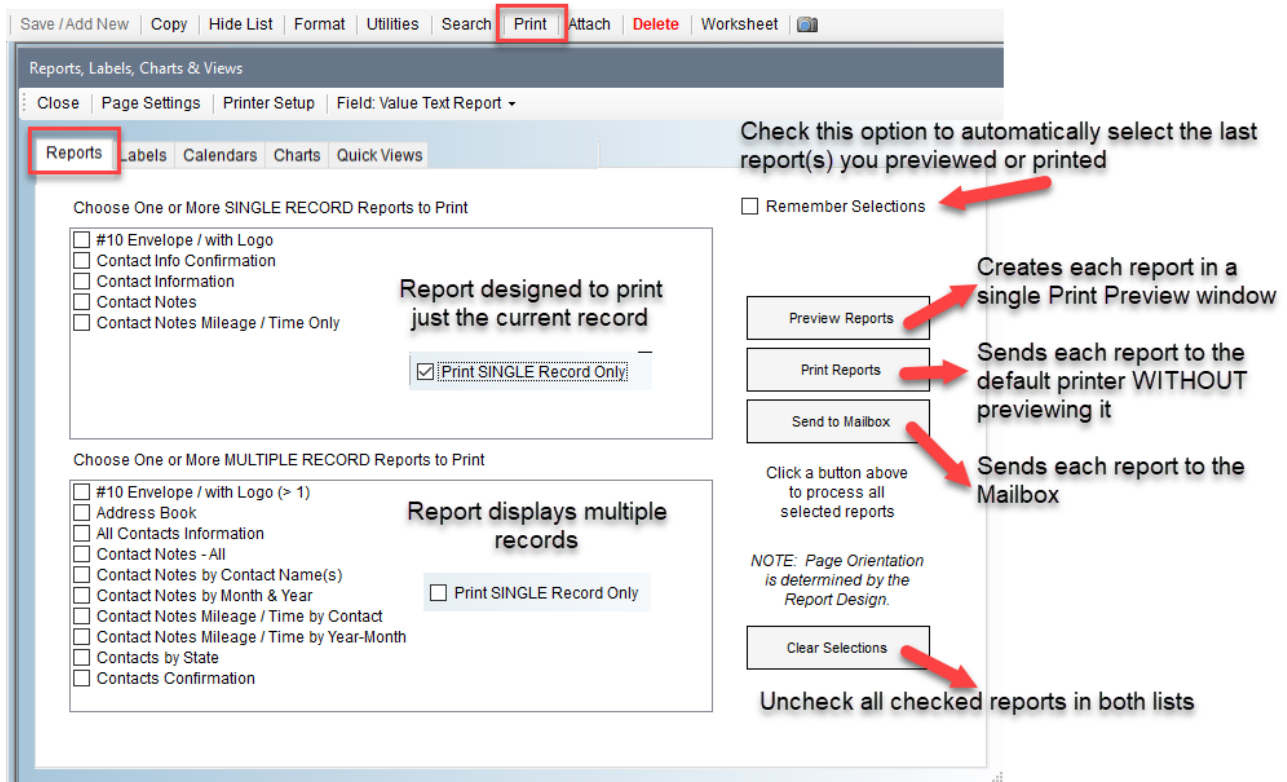
NOTE: You can preview or print multiple reports at the same time by checking more than one report in either or both lists. If you have multiple reports selected with the Preview option, each report will be Previewed in a separate window. Multiple reports will be printed as separate documents when the Print button is used.

To create multiple reports that need to be combined into a single PDF, use the **Send To Mailbox** option to create the individual PDFs which can then be reordered before combining them. More about the **Mailbox** in the next sections of this guide.

The Labels Tab

The Labels features looks at the data in the Navigator on the current page to use for printing labels. For example, if you only want to print labels by a subset of data, you would filter the Navigator by one of its filter options, then open this tab on the Print button.

The first drop-down list shows all of the available fields from the page. Click in one of the five textboxes below it, then select a field. The textbox will add the name of the field, with brackets around it, and the **Label Preview** at the bottom will show you how the data will look on the selected **Label Type**.

You can add text before or after a label tag. In the example below, we're printing labels to put on file folders where we want the **Full_Address** on the top, followed by the **Classification** and **Customer Year** information.

Label Types

The **Label Type** drop-down list shows the supported label sizes. These are standard labels that you can use in any printer. Change the type in the list to see what the page of labels should look like.

Each image is marked with the order in which the records are printed. This is especially important if you have a partial sheet of labels where the first x number of labels have already been used and the rest of the sheet is still usable.

Start On Label Selection

The **Start on Label** drop-down list will start printing the first page on that selected label. This lets you use up that partial page for the first page of labels. Each subsequent page will start printing on Label 1. No more wasted half-used sheets of labels!

Deduplicating Labels

The **Print Unique Values Only** checkbox will automatically deduplicate the data so you only end up with one label per person or title.

Print Same Label Multiple Times

Check the **Print Current Record Only** for return address labels or for any other type where you want each label to have the same data. This will print the record that was displayed on the page when you opened the Print dialog.

Changing the Label Font & Color

You can print labels using any font and text color by clicking the **Text Font & Color** button, which opens the standard Windows Font selection dialog. Your changes will be displayed in the **Sample** textbox and the Preview will also display your choices.

This option is especially important when the Label Type impacts how much space is available on each label. The Price Tag and Return Address labels will require that you shrink down the font size; the Shipping labels would probably work best with larger fonts.

Reports, Labels, Charts & Views

Close | Page Settings | Printer Setup | Field: Value Text Report ▾
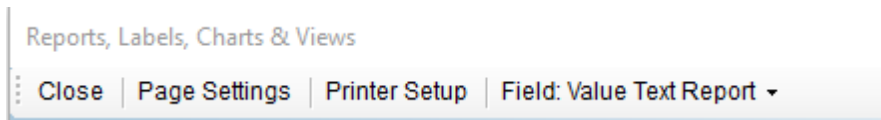
You should also review the **Page Settings** option on the toolbar (above). You may need to set your page margins to less than the standard 1-inch margins that most printers are using.

You can click the **Preview Labels** button to see how your selections impact the final results.

The Calendars Tab

The **Calendars** option uses the data based on what's displayed on the page, filtered or all data, then lets users pick which fields to use on the resulting Calendar-formatted report.

NOTE: Your selections (below) are saved and reapplied each time you open the Calendars tab.

Change Title Font

Click to choose a font for the title of the Calendar.

Chart Title

Enter a simple title in either the left textbox (to print on the left side of the "Month - Year" value) or in the right textbox, to print after the Month-Year.

Date Field

Choose the field from the drop-down list that has the date you want to display.

Calendar Font

You can change the calendar font by clicking this option.

Orientation

Click the best option for your calendar, typically "Landscape" is the best choice giving the most space in each day for information.

Subject Field

Choose the field from the drop-down list that has the data you want to display on each date.

Footer

Choose where to put a footer on each page; the left drop-down list or textbox prints it on the left side of the page, the center drop-down list or text field in the center, the right fields on the right side. The drop-down lists contain templates for printing the Page Number or dates. Or used the "User-Defined" option and enter the text in the textbox below the drop-down list.
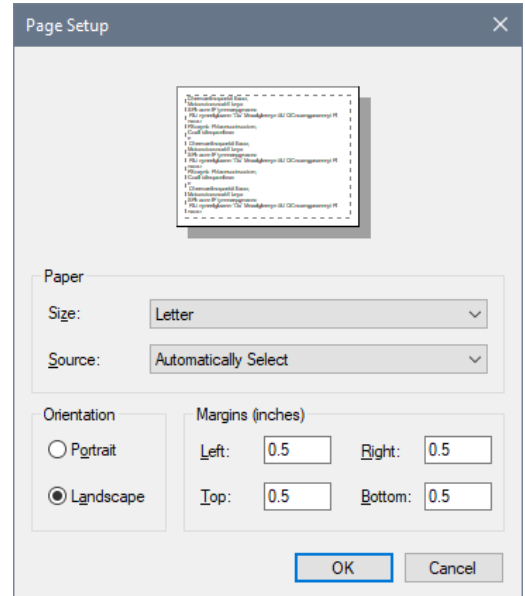
Page Settings (Toolbar Button)

This opens the standard Windows page setup dialog where you can choose the paper size and set margins (see image at right).

Printer Setup (Toolbar Button)

This opens your default Printer Setup dialog (below), where you can change to another print and set the number of copies to print.

Click "OK" to preview the Calendar. All months from the earliest start date (in the range of data you're printing) to the latest date will print, even if there is no data in that month.
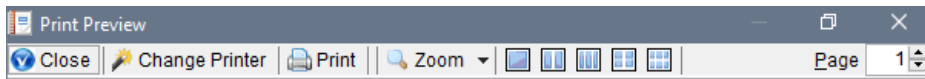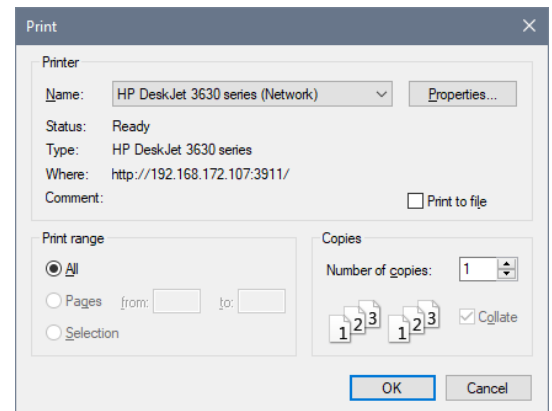
Birthdays November 2024

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
27	28	29	30	31	1	2
3 Michelle Belle Blake	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

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The Charts Tab

The **Charts** page looks at the data in the Navigator on the current page. For example, if you only want to print a chart by a subset of data, you would filter the Navigator by one of its filter options, then open this tab on the Print button.

This option lets you save your settings for each chart. See Option A below for details.

Building A Chart

A. This shows the list of saved charts. After you define a chart (Steps B – J), click the **Save Selections** button at the bottom to save the chart. If you want to delete a saved charts, select it in the drop-down list and click the button on the right side of the list.
B. Give the chart a name or title. This will be displayed on the chart when it's viewed or printed.
C. Choose the field that will display its text on the bars or pie chart legend.
D. Choose the field that makes up the values of the chart.
E. Select the calculation type (SUM, AVERAGE, COUNT). NOTE: SUM and AVERAGE calculations are only avaiable if the field you selected in Step D is a number or date field type.
F. Select the sort order for the numbers calculated by Steps D & E (see list >>)
G. Set the number of decimals to display in the calculated results.
H. Choose **Bar Chart** or **Pie Chart**.
I. If you selected **Bar Chart** in Step H, set the colors for the bars.
J. These additional options will sort and filter the data before creating the chart, and also let you show percentages of the calculated values. Check the **Outine Bars on Bar Chart** to add a black outline on the bars.

Click **View Chart** to display the Chart Preview. See next page for examples of bar and pie charts.

Pie Chart Example
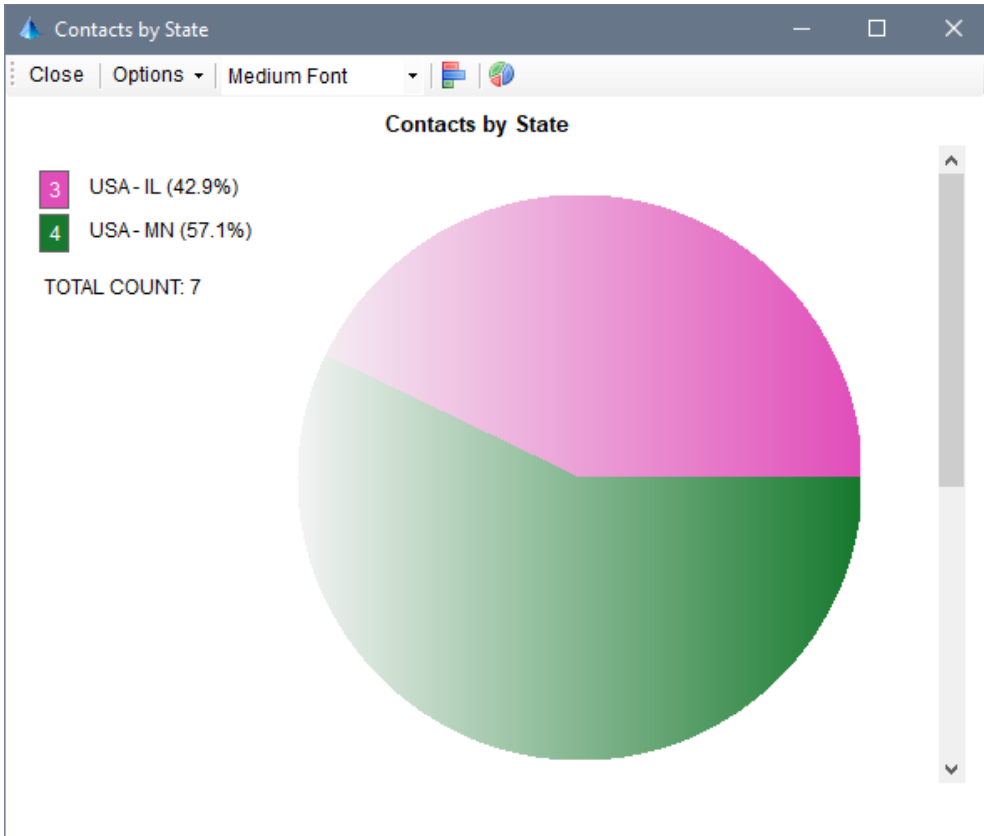
Bar Chart Example
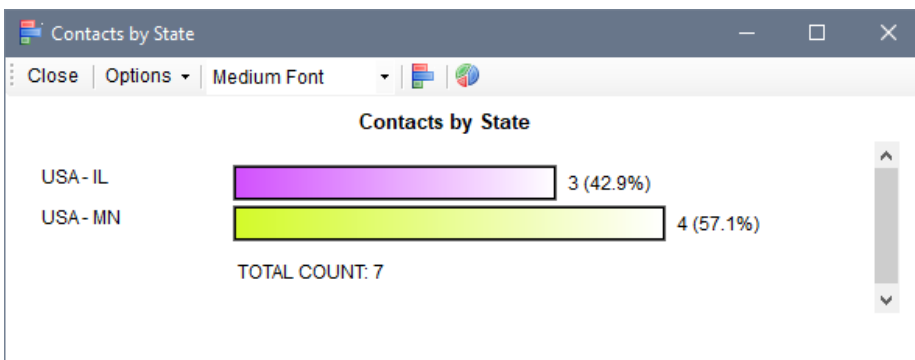
Use the **Options** menu to Save, Copy or Print the Chart. The Print options are the records that are marked as **<Use to Print Charts>** in the **Report Designer.**
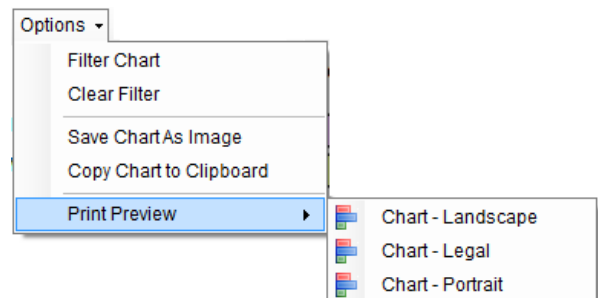
The Quick Views Tab

This page stores data queries that can quickly give you a snapshot of some specific data in the system. You would be able to manually look up this information, but this is a "quick view" of something that's important to see.

In this example, we're looking at our Contacts / Customers where someone has marked the **Needs Attention** checkbox. This view includes contact information so you can easily reach the person to resolve any questions or issues.
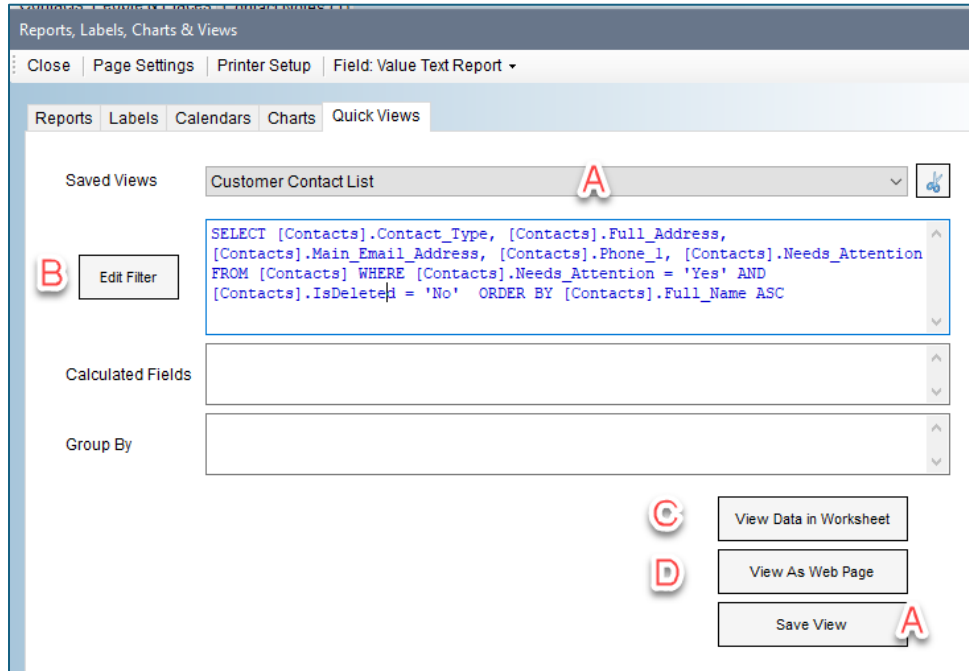
A. This shows the list of saved Views. After you define a View (Step B), click the **Save View** button at the bottom to save the query. If you want to delete a saved view, select it in the drop-down list and click the button on the right side of the list.

B. Click the **Edit** button to open the **Query Builder** dialog. In this example we selected just the fields needed for this purpose, which is the Contacts name, address, email address and phone number, and where the **Needs Attention** checkbox is checked (= Yes). Use the **Test** button to see the results, and click the **Continue** button on the dialog to return the query to the Quick View fields.
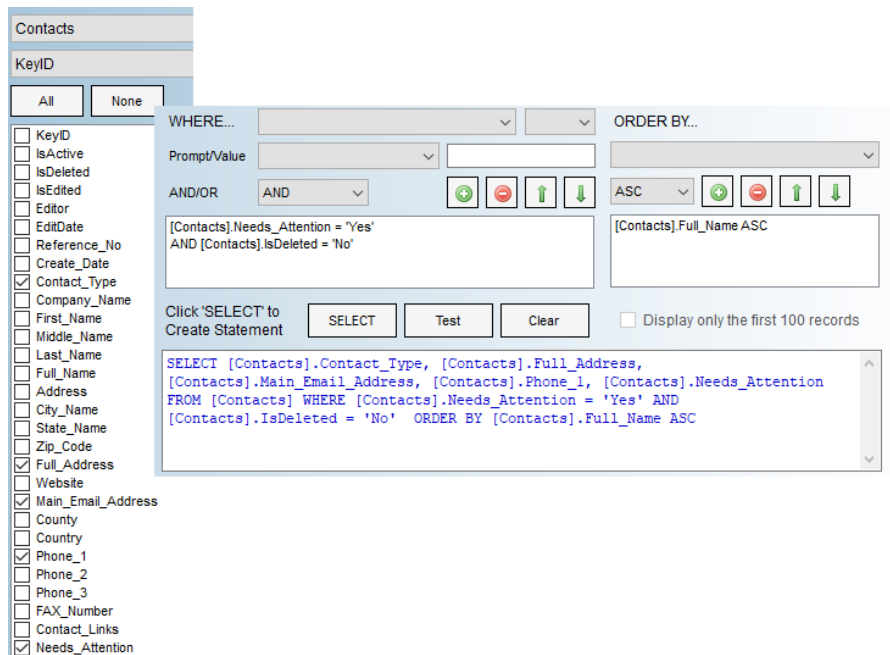
C. Click the **View Data in Worksheet** to see the results in the standard worksheet, which gives you an option to copy the data to Excel (if needed).

D. Click the **View As Web Page** button to save the data as an HTML page, which will open in your default Browser. You can change the default formatting in the **Create Web Page Report** dialog, then click **Continue** to see the results.

Text Reports

The last button on the Print dialog's toolbar is **Field: Value Text Report**. This is a simple print option that requires no setup or design templates.
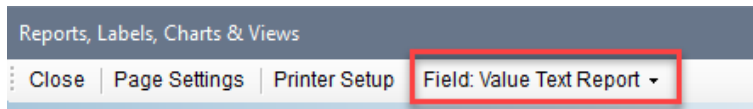
The only options you have for printing this report are whether to print just the Current record, or to print all records, and what the page Orientation should be:
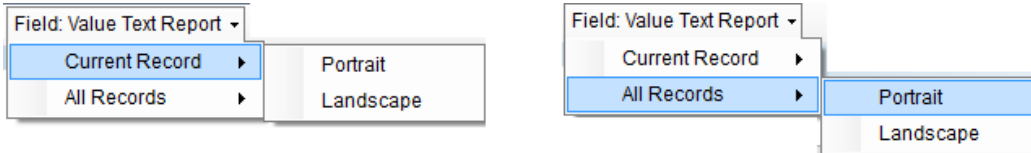
When it runs, it simply writes out the data in this format: **Field: Value** ...which is displayed in a simple Print Preview window:
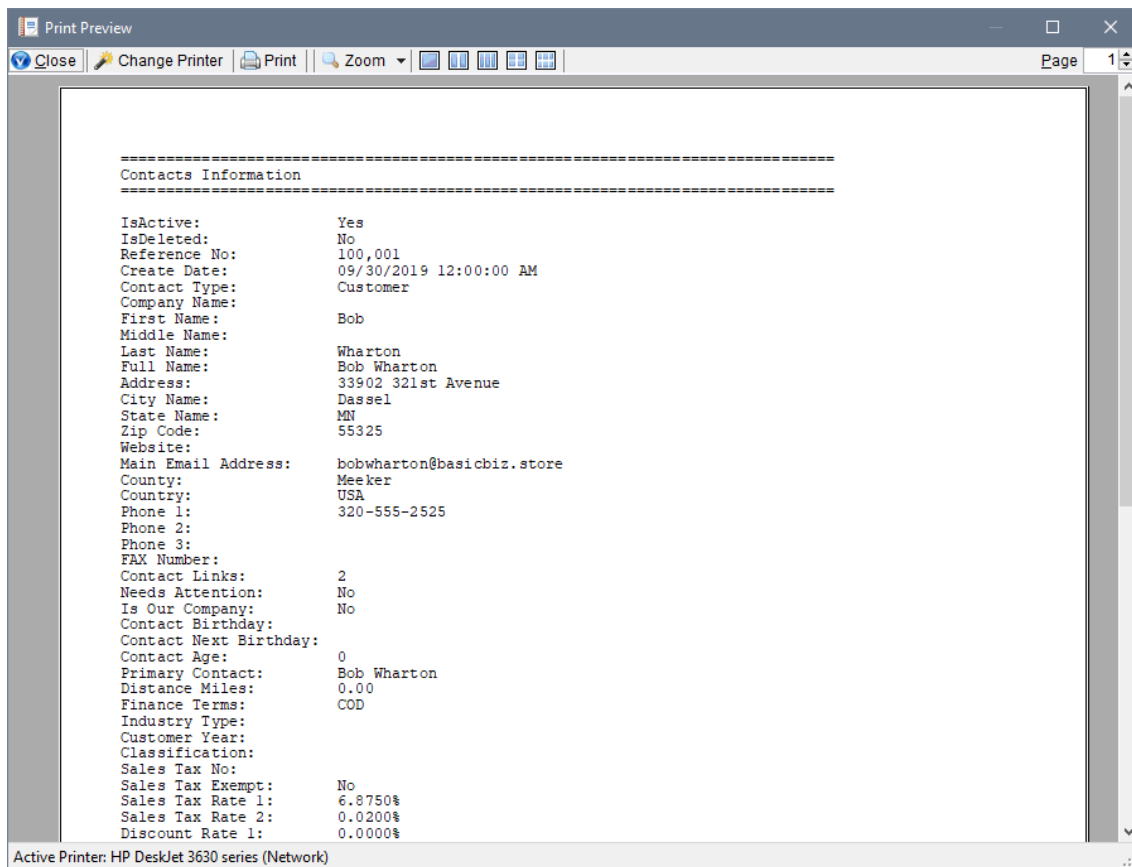
Use the **Zoom** and **Multi-Page** buttons and use the **Page Scroll** on the right on the toolbar to see the data.
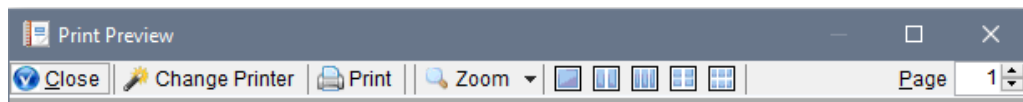
This shows the records wrapped from page to page:

This report option is not intended to be used for distributed reports (to Management or Customers), but is a simple way to get every field in the table into a printed format.

The Print Preview Toolbar

For every printing option the Print Preview Toolbar has a number of features that uses those results in different ways.

Mailbox

Click this button to add the current report to the Mailbox dialog. You can "collect" reports in the Mailbox list, and use the Mailbox utilities to combine the PDFs or email or save them. *See the topic called **Mailbox** in the next section for additional information*.

Email

This button is available IF you have any version of Microsoft Outlook on your computer and you have the Outlook feature selected in your **User Preferences**. When you click this button the current report in the Preview window will be saved as a PDF and attached in a new Outlook message for you to send.

Save

Simply prompts you to save the report as a PDF on your computer or network.

Attach

Creates a file attachment of the report in PDF format and saves it to your database.

Export

This prompts you to export the data you used to build the report in one of these formats: Access Database, Comma-Separated Values (.csv) file, Excel Workbook, or as an XML document.

HTML

This saves the report in HTML format (web page).

Worksheet

This works the same as the Worksheet button on a toolbar; it displays the data used to build the report on a worksheet control in a separate window.

The Top Toolbar

Prints the report.

Use this button to open a dialog where you can the report in HTML format.

This option lets you search the report for specific text.

This option lets you scroll the contents on the report with your mouse.

Change the Preview window to show one page, or two, three, four or six pages.

Zoom in, zoom out on the page.

Zoom page to a set percentage. This setting is saved between Previews.

Move up/down between pages; you can also click in the "Page n/n" field and use your mouse wheel to scroll among pages.

The Mailbox

The **Mailbox** is available from three places in your application: From the **Send to Mailbox** button on the Print dialog; from the **Mailbox** button on the Print Preview Toolbar and from the **Main Menu >> Features** button.

The **Mailbox** gathers files for sending in one email message. You can add reports in .PDF (or image formats), and even combine multiple PDF files into one single file before sending. You can also select files from your computer to include in your email message by clicking the **Add (+)** button on the toolbar.

How It Works

In the example at the right, the three PDF files have been selected from the user's file system by clicking the **Add (+)** button. Check the boxes in front on the files to be combined, then click the **Merge** button, enter a new name when prompted, and the single file is left in the Mailbox list. Click the **Email** button to send the selected file(s) to a new Outlook message for sending.

The Mailbox can be left open between emails if you want to have it available for gathering files to attach to any Outlook message throughout the day.
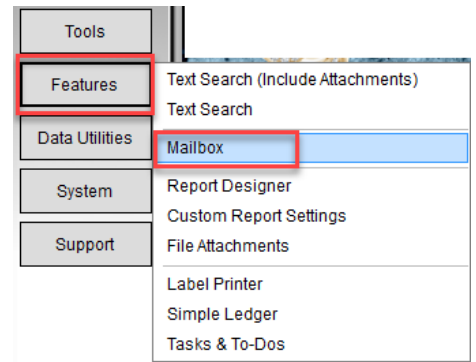
The Label Printer – Another Option

The **Labels** tab on the Print dialog always works with the data current displayed in the Navigator at the time the Print dialog opens. However, you may have other "lists" of labels (think of your annual Holiday card list) or advertising mailing lists that might not belong in your Contacts table. Wouldn't it be nice to be able to utilize the Label options for those as well?

The **Label Printer** feature does just that. It can be opened from the Main Menu >> Utilities >> General (tab) >> Label Printer.

This opens a small form that stores its data in your current database, but is not tied to any other function in the system.

You can categorize each entry and then filter the Navigator by that value when you want to print your labels.
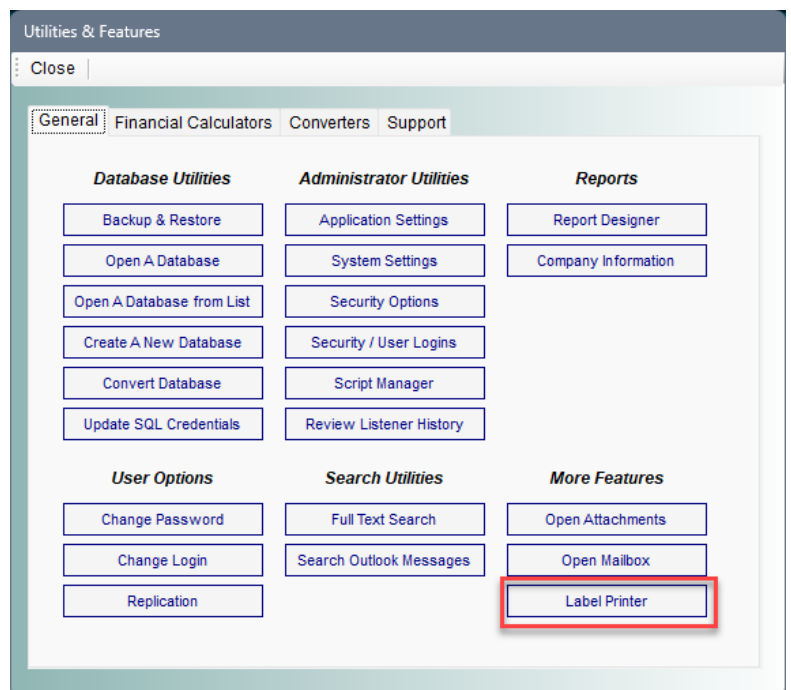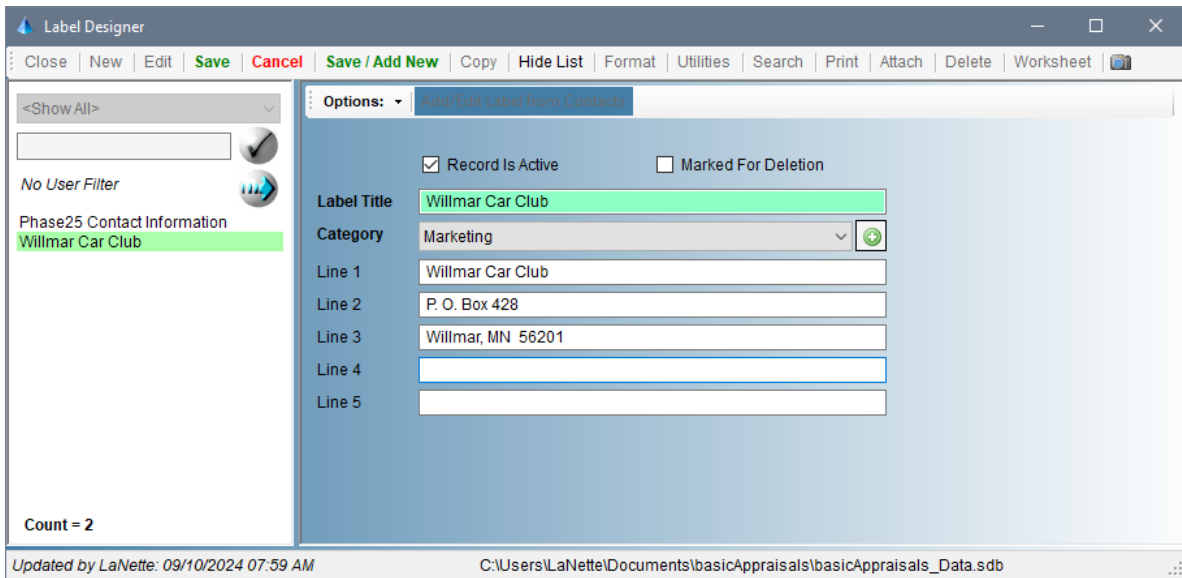
Click the **Add/Edit Label from Contacts** (if available) to pull a list of Contact records that you want to copy to this table.

When you click the **Print** button on the toolbar, all of the label options are available for the data in the **Label Printer.**

System & User Requirements

Phase25 Software (Phase25, LLC) products are designed to be straightforward and easy to use, with minimal administration by the customer, both on a hardware and software level. We strive to quickly resolve any and all issues regarding installation, performance and daily usage; however following these standard Requirements must be met before we can effectively do so.

General User Requirements

- Users must have an overall general understanding of how to use a computer, including but not limited to*:

  ➢ Basic Windows skills, such as copy/paste functions and file & folder navigation in Windows Explorer
  ➢ General Outlook email familiarity to adjust personal settings (Outlook Rules & Alerts & Mail Account settings)

User (Workstation) Hardware Requirements

- Operating Systems: Windows 10, Windows 11 (please make sure all updates and service packs are applied regularly)
- MINIMUM 8GB RAM (12GB+ Suggested). More RAM results in better performance.
- 10MB Hard Drive Space for setup and installation; additional storage required for database
- Video Resolution Minimum of 1280 x 800 (100% Resolution); settings that vary from the default proportions for your system may cause some pages to appear distorted
- Microsoft Outlook 2016 or Office 365 (for email integration & user-to-user Replication)
- High-Speed Internet Connection (for updates, remote support & user-to-user Replication)
- Other computer hardware less than 3 years old.

NOTE: All single-user licensed applications store data in a SQLite database, which is a standalone database engine widely deployed in web browsers, operating systems mobile phones and desktop systems. This database type is called *zero-conf*, which means it needs no administrative services.

Enterprise Software Requirements

Enterprise versions support multiple users by adding features such as SQL Server / SQL Server Express integration. Contact support for pricing and additional information at www.phase25.com.

For multiple user customers, we require that **one person** from within your company be designated as the Contact Person for exchanging information about updates, support issues, and any other communication with Phase25 Software regarding the training, installation and general daily operations of the software product. We do not support each user on a one-to-one basis in multi-user situations; the Contact Person within the company is responsible for mitigating on-site issues and communicating those personally to the support staff at Phase25 Software and then reporting any resolutions, update notices, etc., to the licensed users within the company.

- Supported Database Platforms (Enterprise)

  ➢ Microsoft SQL Server 2016 or above - requires SQL Server installed and operating on a company network and is NOT included in our software packaging, installations or pricing.
  ➢ Microsoft SQL Server EXPRESS 2014 - requires SQL Server Express 2014, which is a free product available from Microsoft's website (https://www.microsoft.com/en-US/download/details.aspx?id=42299).
  ➢ We recommend downloading and installing the SQL Server Management Studio 2014 (free) to facilitate setting up the application login and password required by our software. Please refer to Microsoft documentation for system requirements for their products.*

- Replication Requirements (Enterprise)

  ➢ Microsoft Outlook 2016 or above or Office 365
  ➢ High-Speed Internet Connection
  ➢ For Replicator Server Utilities - Windows Server NOT required (Replicator can run on a workstation); however the workstation should be an up-to-date computer with a minimum of 16GB of RAM to efficiently process replication packages for client systems.

*We provide instructions for setting up an application role login and password on SQL servers, however, we do not support the overall operations of any SQL Server products as that is the responsibility of the vendor from which it was purchased.

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2.3 Rental. You may not rent, lease, or lend the SOFTWARE PRODUCT.

2.4 This EULA does not grant you any rights in connection with any trademarks or service marks of Phase25 Software

2.5 Support Services. Phase25 Software may provide you with support services related to the SOFTWARE PRODUCT ("Support Services"). Use of Support Services is governed by the Phase25 Software policies and programs described in the user manual, in "online" documentation and/or in other Phase25 Software-provided materials. Any supplemental software code provided to you as part of the Support Services shall be considered part of the SOFTWARE PRODUCT and subject to the terms and conditions of this EULA. With respect to technical information you provide to Phase25 Software as part of the Support Services, Phase25 Software may use such information for its business purposes, including for product support and development. Phase25 Software will not utilize such technical information in a form that personally identifies you.

2.6 Software Transfer. The initial user of the SOFTWARE PRODUCT may make a one-time permanent transfer of this EULA and SOFTWARE PRODUCT only directly to an end user. This transfer must include all of the SOFTWARE PRODUCT (including all component parts, the media and printed materials, any upgrades, this EULA, and, if applicable, the Certificate of Authenticity). Such transfer may not be by way of consignment or any other indirect transfer. The transferee of such one-time transfer must agree to comply with the terms of this EULA, including the obligation not to further transfer this EULA and SOFTWARE PRODUCT.

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