# Steps to create a report that can be exported from PDS:
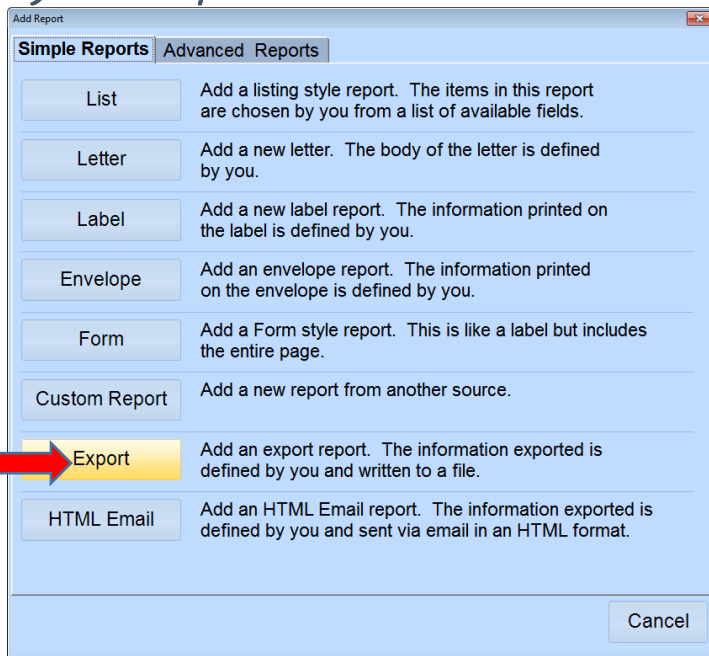
## 1) Go to: Families and Report on the Families Tab



## 2) Click Add

## 3) Click export

**Add Report**

| Simple Reports | Advanced Reports |

| List | Add a listing style report. The items in this report are chosen by you from a list of available fields. |
| Letter | Add a new letter. The body of the letter is defined by you. |
| Label | Add a new label report. The information printed on the label is defined by you. |
| Envelope | Add an envelope report. The information printed on the envelope is defined by you. |
| Form | Add a Form style report. This is like a label but includes the entire page. |
| Custom Report | Add a new report from another source. |
| Export | Add an export report. The information exported is defined by you and written to a file. |
| HTML Email | Add an HTML Email report. The information exported is defined by you and sent via email in an HTML format. |

Cancel

## 4) Select fields from family detail: For Census reports to Diocese you will choose the following fields:

Second ID
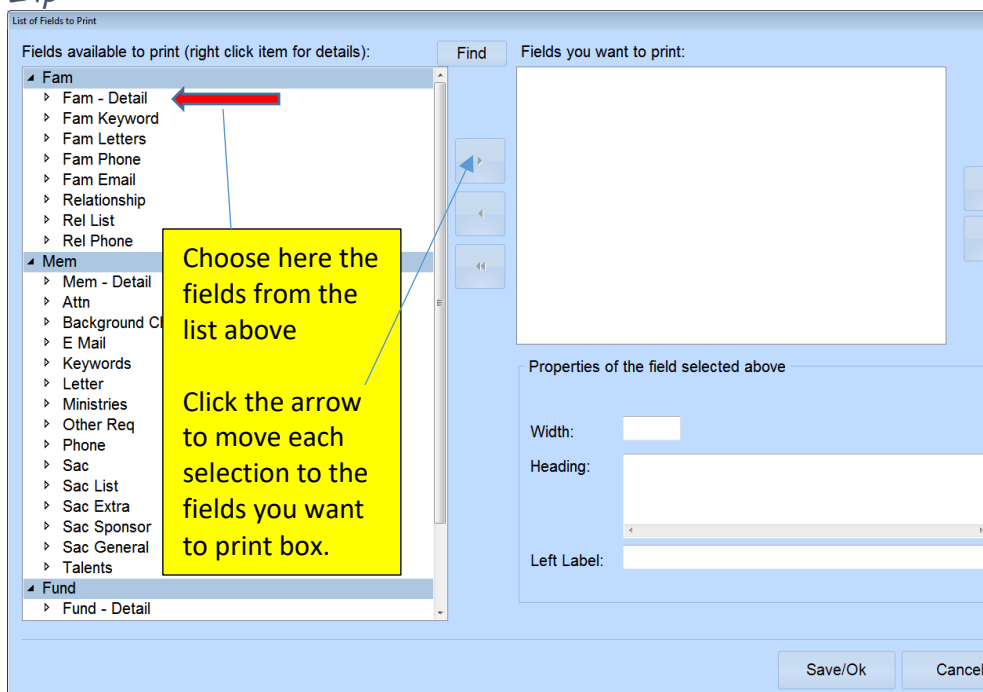
Name format 14

Address 1

City only

State only

Zip

Name format 2

Phone Home

Email 1

Name format 13

Family Keyword Description

**List of Fields to Print**

Fields available to print (right click item for details):

Find

Fields you want to print:

▲ Fam
  ▷ Fam - Detail
  ▷ Fam Keyword
  ▷ Fam Letters
  ▷ Fam Phone
  ▷ Fam Email
  ▷ Relationship
  ▷ Rel List
  ▷ Rel Phone
▲ Mem
  ▷ Mem - Detail
  ▷ Attn
  ▷ Background C
  ▷ E Mail
  ▷ Keywords
  ▷ Letter
  ▷ Ministries
  ▷ Other Req
  ▷ Phone
  ▷ Sac
  ▷ Sac List
  ▷ Sac Extra
  ▷ Sac Sponsor
  ▷ Sac General
  ▷ Talents
▲ Fund
  ▷ Fund - Detail

**Choose here the fields from the list above**

**Click the arrow to move each selection to the fields you want to print box.**

Properties of the field selected above

Width:

Heading:

Left Label:

Save/Ok    Cancel

## 5) Verify Your Screen looks like this then Click Save/Okay

**List of Fields to Print**

Fields available to print (right click item for details):     **Find**

Fields you want to print:

**Fam - Detail**
- Address 1
- Address 2
- Address Block
- Address Changed
- Address Remarks
- All Member Names
- Alt. Address Day to End
- Alt. Address Day to Start
- Alt. Address Month to End
- Alt. Address Month to Start
- Alternate Address Block
- Alternate Address is Certified
- Alternate Address Line 1
- Alternate Address Line 2
- Alternate Carrier Route
- Alternate City
- Alternate City Only
- Alternate DP
- Alternate Lat
- Alternate Lng
- Alternate Period
- Alternate State Only
- Alternate Zip
- At Alt
- Blank1
- Blank2

**Fam Second ID Number**
Fam Name Format 14 ( Smith, Jr., John & Mary)
Fam Address 1
Fam City Only
Fam State Only
Fam Zip
Fam Name Format 2 ( Mr. & Mrs. John & Mary Smith, Jr.)
Fam Phone Home
Fam Email 1
Fam Name Format 13 ( John & Mary Smith, Jr.)
Fam Keyword Description

**Properties of the field selected above**

Width: `12`     Word Wrap: ☐

Heading:
```
Fam
Second ID Number
```

Left Label: _____

**Save/Ok**     **Cancel**

## 6) Click Edit and Give your new report a Name "Monthly Census Export" Then click Next

Parish Data System - Church Office

File   Information   Personnel   Sacramental Registers   Reports   Processes   Administration

Dashboard   Families   Members   Contributions

Return to Families
Select a Different Report

**Overview**
Export Setup
Select Families

Build Export File
Cancel the Report

Exit Program

**Overview:**

Name:          **Monthly Census Report**          Edit

Description:                                        Edit
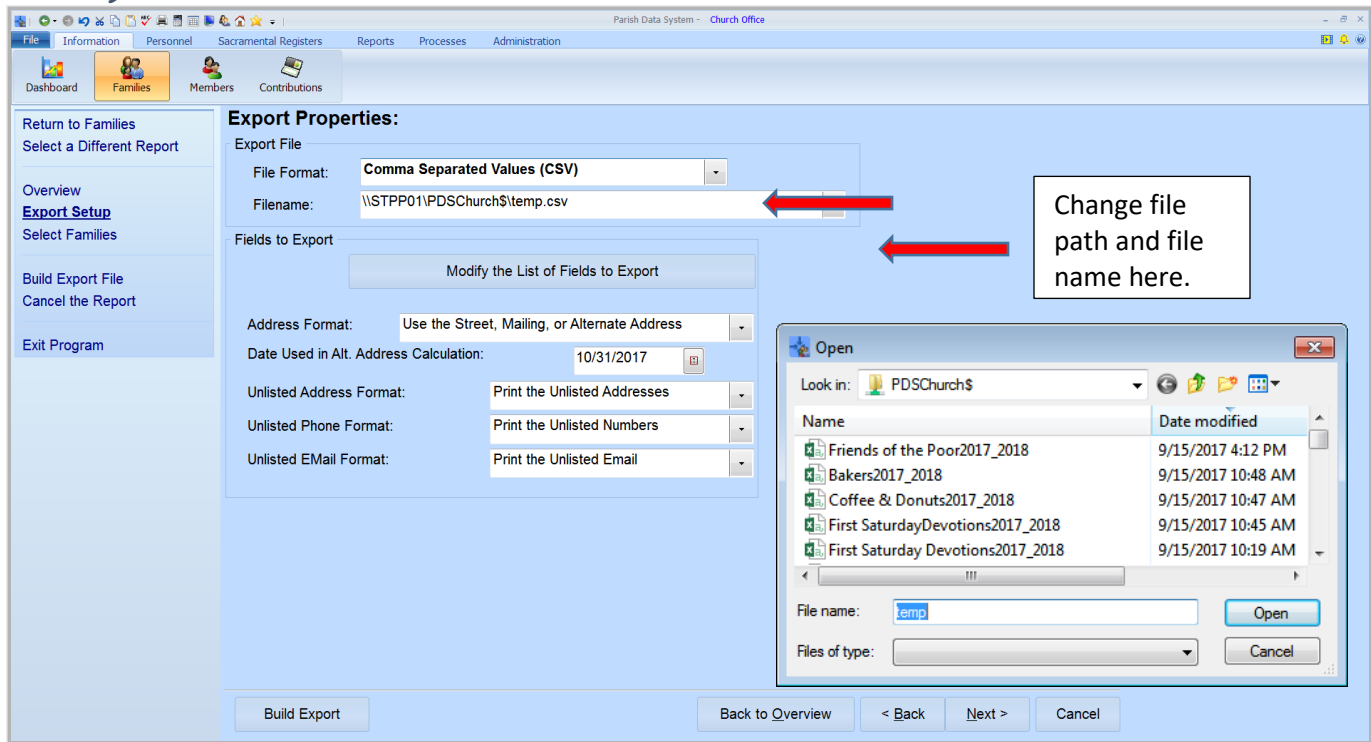
Report Owner:   jrhansen          Report Access:   Private

Print Detailed Overview

Export:   Filename:     \\STPP01\PDSChurch$\temp.csv
          File format:  Comma Separated Values (CSV)

Selection:   Sort by:     ID Number

Build Export          < Back   Next >   Cancel

**7) Click File Format drop down select Comma Separated Values** *if not already selected.*



**8) Click Filename dialog box and set where you want to your file to be saved and what name you want to give it.**

*You can do something similar each time you run this report. Example below.*

*From F:\Diocesan\2017 ADDs\Census Update October_2017.csv*

**9) Click Next** *(after you verify your filenames again)*
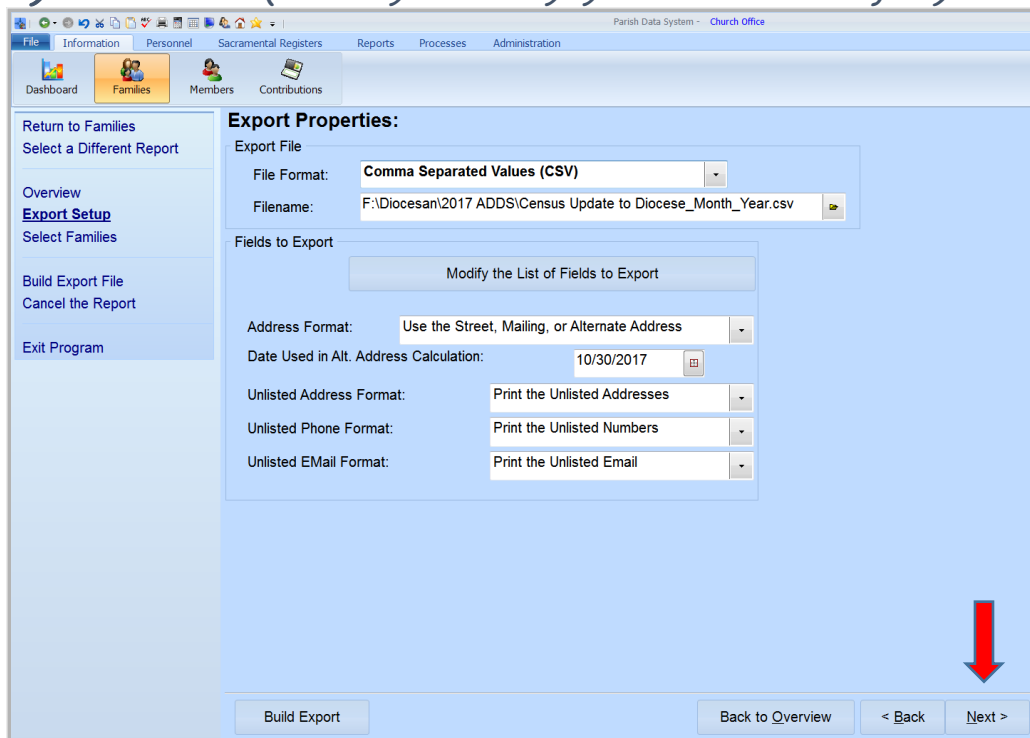
**10)** *In the Selection Information Tab, Click Add then Click inside the Name dialog box and give your Selection Type a Label Example (Monthly Census to Rockford Diocese)*



**11) Click "Additional Selections"**

## 12) Click on "click here to add a new condition"



## 13) Click "Fam Keyword"

## Click "Description"

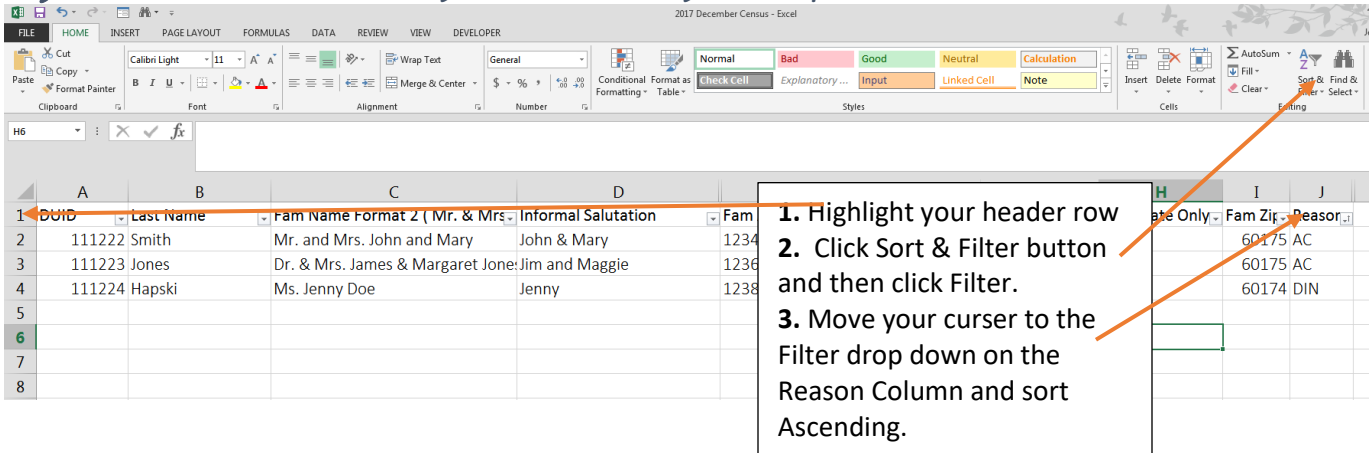14) Click "is equal to" change to "is in list", then select the blank line and check off all keywords for the Rockford Diocese reports. AC,DIN,NM etc

15) Click Enter on your keyboard, Click Build
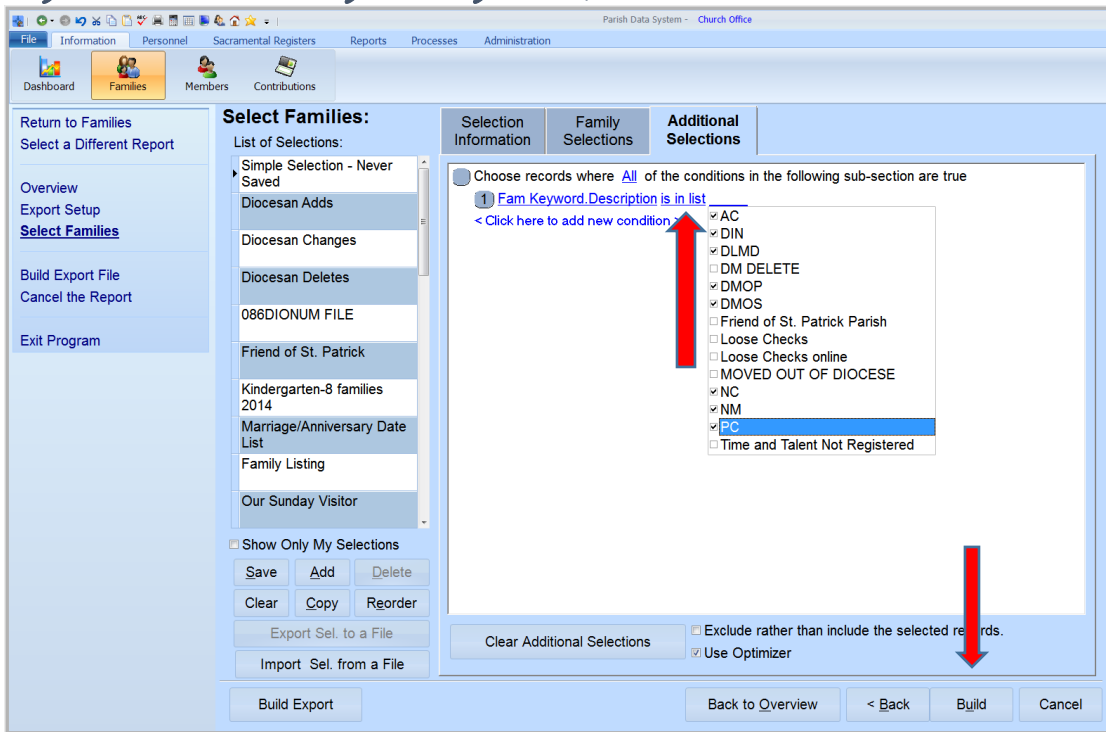


Your report will build and export to the file location you listed under filename.

17) Click View File then you can view your report, filter and sort in Excel



1. Highlight your header row
2. Click Sort & Filter button and then click Filter.
3. Move your curser to the Filter drop down on the Reason Column and sort Ascending.

18)Save it and send to the diocese at census@rockforddiocese.org with your parish name and number in the subject field and your .csv file attached. Your finished product will be a CSV file that can be imported by Rockford to Parish Soft. 1.Highlight your Header Row, 2.click Sort and Filter.  Then 3. Filter Ascending on the "Keyword" Column