# **Report List Instructions**

## To Setup your Report List Preferences:

 $1. \ \ {\rm In \ ClickFORMS, \ Click \ on \ Lists>Show \ Reports \ list.}$ 

Lists	Insert GoTo Tools Services
	Show <u>C</u> lients List
8	Show <u>R</u> eports List
8	Show <u>N</u> eighborhoods List
8	Show Comparables List

2. Click on the preferences tab.

🚯 List of Reports							
New Del	ete Search City	🗸 for					
Reports	Preferences	Options					
Drag a column header here to group by the to column							
Type 💌 Fi	leNo 💌 Street No.	▼ StreetName ▼					

3. In the preferences tab view, you can select\unselect the column fields you wish to have viewable by checking or un-checking the corresponding box next to that columns field name.

🚯 List of Reports							
New	Delete Search City	for					
Rep	orts Preferences	Options					
Visible	Field						
<b>_</b>	Туре	Restore Defaults					
<ul> <li>Image: A set of the set of the</li></ul>	FileNo						
	Street No.						
	StreetName						
	City						
	State Check box to view						
	County						
	SearchKeyWords						
	ParcelNo	7					
<ul> <li>Image: A start of the start of</li></ul>	Zip						
	CensusTract						
<ul> <li>Image: A set of the set of the</li></ul>	Neighborhood						
	MapRef						

## Change the Column Order in your Report List View

You can Change the Order of the Columns by Dragging and Dropping them in to a position

🚯 List of Re	ports												X
New Delete Search ParcelNo 🗸 for Find Open as Clone Open Close													
Reports	Prefer	ences	Options										
Drag a column	header here to	group by that c	olumn		ų	ъ							<u>^</u>
Type 💌	FileNo 💌	Street No. 💌	StreetName 💌	City	-	Zip County	•	ParcelNo 🔹 💌	Zi	p 🔻	State 💌	Neighborhood	•
▶ Hm	06060901	165	BULLCREEK DRI	VICKSBURG	1	REN		1234 20 1562 003	. 391	80	MSİ	SOUTH COUNTY	1
URAR	G03-800YALE	800	Yale Road	Boulder, CO		Boulder 🔀	N	157708213006			CO	Table mesa	E
URAR		58819	Yucca Trail	Yucca Valley		San Bernar	y	0588-701-13-0.00	922	84	CA		1
URAR	JACKSON	4641	HAVENHURST	ENCINO		LOS ANGELÊ	S	2284-009-021	914	36	CA.	HAYVENHURST	E
URAR	9452RP1F	46	6th Street	Ridgefield Park		Bergen		Same as Above	076	60	NJ	N/A	F

## To Perform a Quick Report List Search by using the Auto Filter:

1. In ClickFORMS, Click on Lists>Show Reports List.

Lists	Insert GoTo Tools Services				
	Show <u>C</u> lients List				
8	Show <u>R</u> eports List				
	Show <u>N</u> eighborhoods List				
	Show Comparables List				

2. In the reports list tab view find the column heading you wish to search by, i.e. street no and click on the down arrow, then click on custom.

🚯 List of Reports									
New Delete Search StreetName 🔽 for									
Reports	Reports Preferences Options								
Drag a column	header here to	group by that	col	umn					
Type 💌	FileNo 💌	Street No.	4	StreetName 💌					
▶ 2-4 Income	104-5G	(AII)	~	702 FINDLANA					
URAR	0201059	(Custom)		v. Berry Avenue					
URAR	0102047B	(Blanks) (NonBlanks)		aint Paul Street					
URAR	052-1426102	103		V. Tufts Place					
URAR	0102042	11767		rown Bear Court					
URAR		1602 444		lutland Ave					
2-4 Income	104-5G	562		702 FINDLAY A					
2-4 Income	104-5G	63		702 FINDLAY A					
URAR	97-199	700 7617	~	he Alameda					
LIBAR	909090	/01/	<u> </u>						

3. In the custom auto filter window, click on the down arrow to select the first comparator for your first or possibly only numeric/alpha search string you wish to search for. Select the comparator for your second alpha/numeric string if you will be entering one.

Custom AutoFilter	? 🛛
Show rows where: FileNo	
equals 💌	
equals	
does not equal	
is greater than	
is greater than or equal to	
is less than	OK Cancel
🖳 is less than or equal to 💦 🔪	
blanks	
non blanks	

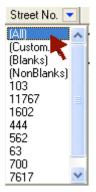
4. Enter the numeric or text values you wish to search for and click [OK]

Custom AutoFilter	? 🔀
Show rows where: Street No.	
is greater than or equal to	• 103
💿 And 🛛 Or	
is less than or equal to	r 1602
	OK Cancel

5. The report list will now only display the reports that were found based on the custom auto filter values you entered.

🚯 List of Re	ports								×
New	Delete Sea	arch City	🖌 for		Fin	d (	Open as Clone	Open Clos	е
Reports	Prefer	ences	Options						
Drag a column	header here to	group by that co	olumn						
Type 💌	FileNo 💌	Street No. 💌	StreetName 💌	City 💌	State 💌	Zip 💌	County 💌	. CensusTract	▼ F
▶ URAR	052-1426102	11767	W. Tufts Place	Morrison	CO	80465	Jefferson	0120.16	
URAR	97-199	1602	The Alameda	San Jose	CA	95126	Santa Clara	32N 57E	ę
URAR		103	Via Tusa	Santa Barbara	CA	93105	Santa Barbara	0001.03	Ę
🗙 ((Street No.		Street No. <= 16	602))						
									1

- 6. After completing reports list search operation, click on the report you wish to open and then click on the [Open] or [Open as Clone] to open that report.
- 7. Clear the search when finished by clicking on the down arrow again and selecting "All".



#### To Export or Print from the Report List:

1. In ClickFORMS, click on lists> show reports list.

Lists	Insert <u>G</u> oTo <u>T</u> ools <u>S</u> ervices						
	😝 Show <u>C</u> lients List						
	Show <u>R</u> eports List						
	Show Neighborhoods List						
₿	Show Comparables List						
The List Menu							

2. Click on the options tab.

🚯 List of Report	ts					
New Del	ete Search City	V for				
Reports	Preferences	Options				
Drag a column header here to group by that column						
Type 💌 Fil	eNo 💌 Street No.	▼ StreetName ▼				

#### Select the Options -

New De	lete Search City	🖌 for
Reports	Preferences	Options
🔲 Only selecte	ed records	
Print	]	
Export	) 🔿 to Text File	◯ to Excel

#### [Print]

**Only Selected Records** - Hold down the shift key and click on the records you wish to select. If the only select records box is not checked it will print all the records contained in the Report List

## [Export]

**To Text File** - This will export all records contained in the Reports List to a Text File i.e. tab delimited (\*.txt). If you check the "**Only Selected Records**" **Box**, hold down the shift key and click on the records you wish to export.

**To Excel** - This will export all records contained in the Reports List to an Excel File i.e. comma delimited (\*.xls). If you check the "**Only Selected Records**" **Box**, hold down the shift key and click on the records you wish to export.

5. Click on the [Print] or [Export] buttons once you have selected the Options you wish to use.

## To automatically add Reports to the Reports Database:

1. To set the preference to automatically save the reports to the reports database, go to Edit> Preferences, in the application section click on saving. Check the box to automatically save the report properties to the reports database.

Application	(پ	
Startup		
Folders	· •	
Databases		Automatically save the report properties to the Reports Database
Saving	L L	
Auto Updating		Ask before saving the report properties in the Reports Database Use this option to confirm that the properties are correct before
PDF Creator		saving to the database the first time.
Photo Inbox		-

#### 2. By checking the "Ask before saving report....."

When working on a new report or one that has never been added to the reports database when you Exit or Close that Report, you will be asked if you want to add the report to the reports database, click **[Yes]** 

Question?	
?	02102007.clk has not been recorded in the Reports List. Do you want to record it? If so please confirm the data in File/Properties.
	Yes No

3. When the properties window opens, click on [Save To Reports List].

🚯 Report Properties 🛛 🔀				
Property	Value			
Report Type	2-4 Income			
File No	FN-71414			
Search Keywords				
Street Number	Bascom Street			
Street Name	1456			
City	Campbell			
State	CA			
Zip	95014			
County	Santa Clara			
Census Tract				
Parcel No				
Neighborhood				
Map Reference				
Total Rooms	10			
Bedrooms	4			
Bathrooms	2			
Gross Living Area	1369			
Site Area	4000			
Appraisal Date	01/15/07			
Appraisal Value	\$875,500			
Borrower	Vanessa Sanchez			
Client	Yesenia Chevez			
Author	Jill Garcia			
Date Created	11/14/2005			
Last Modified	11/14/2005			
Refresh S	ave to Report List Close			

# To manually add Reports to the reports database:

1. For reports that were not previously saved or have been modified, go to File, Properties.

Eile	<u>E</u> dit	<u>V</u> iew	F <u>o</u> rms	⊆ells
Ľ	<u>N</u> ew			•
2	Oper		Ctrl	+0
	Орег	As C <u>l</u> o	ine	
	Орег	1 ToolBo	o <u>x</u> Files	►
	Орег	<u>R</u> ecer	it Files	►
à	⊆lose	•	Ctrl-	+₩
2	Sa <u>v</u> e		Ctr	l+s
	Save	<u>A</u> s		
	Save	As <u>T</u> er	nplate	
9	Print		Ctr	l+P
Ø	Creal	te Adoļ	e PDF	
-	Sen <u>d</u>	То		Þ
	Ехро	rt		►
	<u>I</u> mpo	rt From	1	►
	<u>M</u> erg	e Files.		
	Conv	ert Rep	oorts	•
	Prope	ertie <u>s</u>		
	<u>E</u> xit		a.	+Q

2. When the properties window opens, click on [Save To Reports List].

🚯 Report Properties 🛛 🔀				
Property	Value			
Report Type	2-4 Income			
File No	FN-71414			
Search Keywords				
Street Number	Bascom Street			
Street Name	1456			
City	Campbell			
State	CA			
Zip	95014			
County	Santa Clara			
Census Tract				
Parcel No				
Neighborhood				
Map Reference				
Total Rooms	10			
Bedrooms	4			
Bathrooms	2			
Gross Living Area	1369			
Site Area	4000			
Appraisal Date	01/15/07			
Appraisal Value	\$875,500			
Borrower	Vanessa Sanchez			
Client	Yesenia Chevez			
Author	Jill Garcia			
Date Created	11/14/2005			
Last Modified	11/14/2005			
Refresh S	ave to Report List Close			

3. On modified reports click on the update report list button.

Refresh	Update Report List	Close
Last updated o	on 02/07/2007	

#### How to create a new Reports Database

1. In ClickFORMS go to List, show report list.

Lists	Insert GoTo Tools Services
Ð	Show Clients List
Û	Show Reports List
Ē	Show Neighborhoods List
8	Show Comparables List

2. Click on the options tab.

List of	Report	5				
New	Dele	te	Search	StreetN	ame	🗸 for
Repor	ts	5	Preference	8	Opt	ions

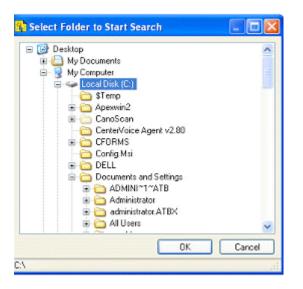
3. Click on the rebuild list button.

New D	elete Search Stre	setName 🗸 fo
Reports	Preferences	Options
Only selec	ted records	
Print		
Fork	_	
Export	o to Text File	O to Excel
Rebuild List		
Note: When F	(ebuilding	

Note: Our current reports will be back up and rename it to reports.bak, should you wish to revert back to it at a later time.

Rebuild	List	
Note: Wh	en Rebuilding	
	nt Reports List will be renamed as	×.bak
	d process starts with a new, empt	

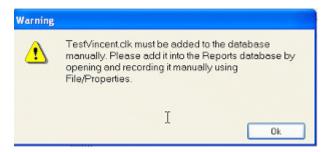
4. Unless you have report stored in different locations, select your local disk (C:\), or shared folder/drive if in a network environment.



**5.** During the rebuilding process you may receive messages prompting you with the option of replacing duplicates. If you know that there are many duplicates, you should click on **No to ALL**.

Notice	
٩	A duplicate of 068311.clk already exists in the database. Do you want to replace the existing one with 068311.clk?
	If not, 068311.clk will be considered a duplicate and ignored.
No	to All Yes to All No Yes

6. A warning message may also appear, that a certain report will need to be add manually into the Reports list



7. You should write down the name of the report to add manually later then Click on OK

8. Once the rebuild process is completed you will see a similar window



9. Click on OK and you now have a new Reports Database.