

Design For Printing Webinar

Meet Your Trainer

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Learning Objective

Help Report Writers understand best practices for exporting/printing reports so that users confidently know which tool to use when printing Results reports.

Agenda

Overview

Common Uses

Print Reports

Export Reports

Overview

Overview

- Allows for the creation of physical documentation and records that can be stored, filed
- Provides a tangible reference point for participants and can be distributed to organizations with no access to results

Common Reasons

Common Reasons

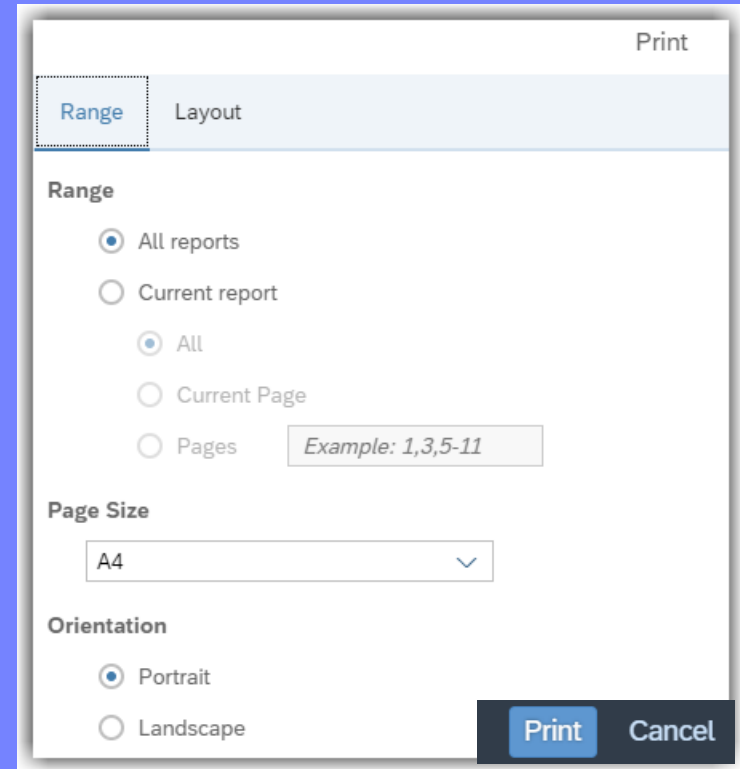
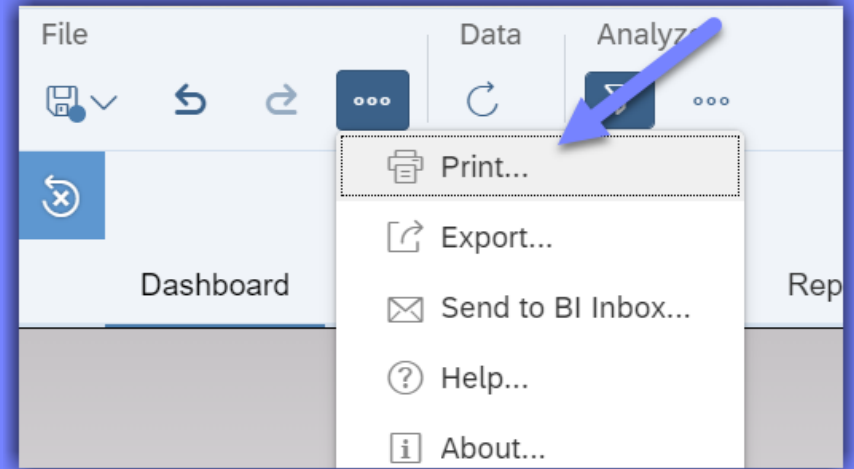
Common Reasons:

- To share with colleagues or funders who do not have access to Results
- To store in an archive so reports can be compared over time
- So that additional data analysis may be done (in Excel)
- So that data can be imported into another system (for example, a funder mandated database or statistical analysis software)
- To have a paper copy for a file requirement, or to review during a meeting

Print Reports

Print Report

- Below the File menu, click the ... icon and select Print
- Determine the Range
- Adjust the Layout if desired
- Select the printer or PDF printer
- Click the Print button



Print Report

- Click Layout
- Adjust the top, left, bottom, and right margins
- Adjust the Scaling to fit page

Print

Range **Layout**

Margins

Top: inches Bottom: inches

Left: inches Right: inches

Scaling

Adjust to: %

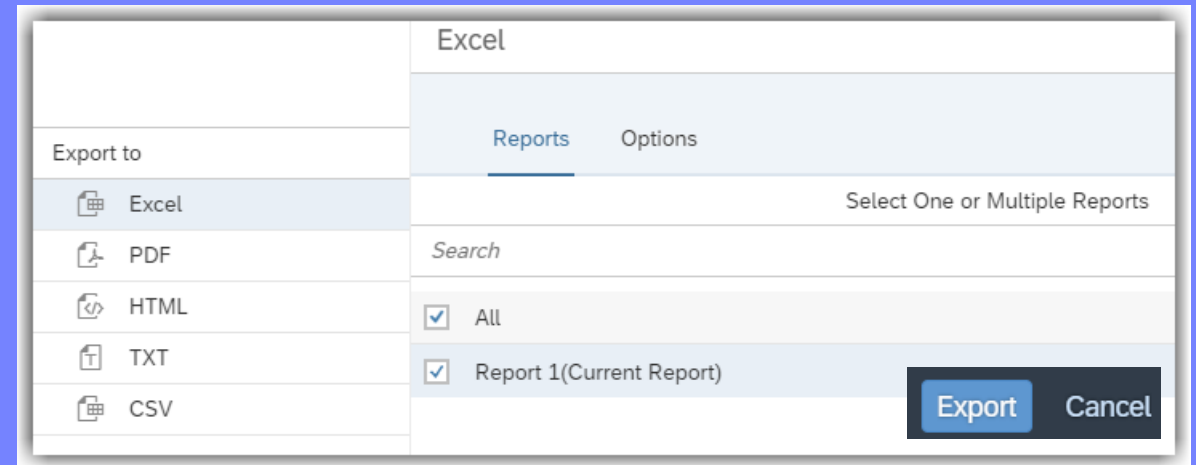
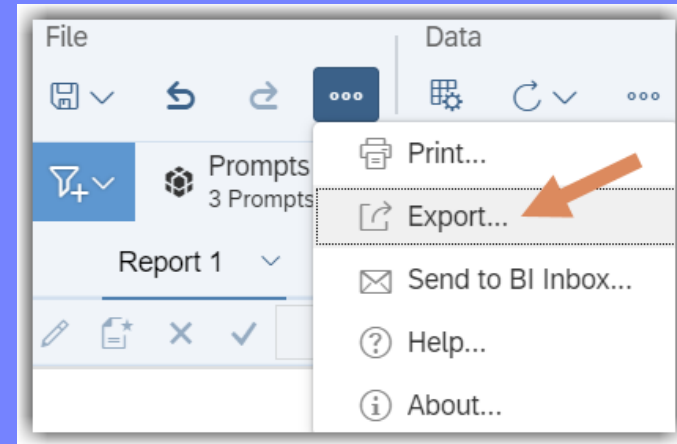
Fit to: page(s) wide pages(s) tall

Print Cancel

Exporting Reports

Export Report

- Below the File menu, click the ... icon and select Export
- Choose the file type (Excel, PDF, CSV, etc)
- Select which Reports (tabs) to export
 - Double check this step as it's a common area of confusion
- Locate file in the Downloads folder on your computer

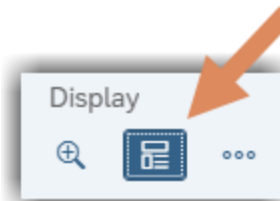


Best Practice

Keep in mind:

Check the Print Layout to determine whether a report is formatted to export to PDF or print cleanly. It's common for tables to spill onto multiple pages.

Print Layout is a tool under the Display menu that shows how the report will look in PDF or printed out.



Additional Resources

Additional Training Opportunities

- Knowledge Base Articles – Search in Chat
- On-demand Videos in our [Bonterra Academy](#)
- Free Webinars & Recordings
- Foundations - Intensive Multiday Trainings that Cover the Basics
- Labs - 2 hr Live Trainings on Specific Topics and Capabilities



Build confidence and knowledge
in our software.

Customer Support

Reach out to our Customer Support Team with Questions or Concerns.

Weekdays 7am – 7pm CST via chat or through email: apricot@bonterratech.com

Q & A

- Ask questions about functionality covered in this training
- Ask trainer to redo a demo
- Ask real-life application questions
- Or sign off and we will see you in the next training!



Thank you for attending!

We hope to see you
in future trainings.