



# The Exact Change Report Press



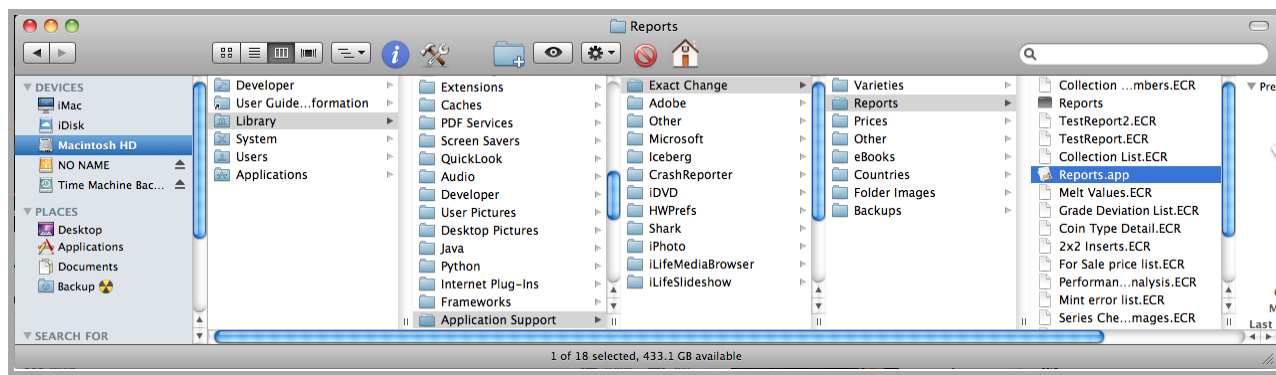
# The Exact Change Report Press

*Using the report editor to create custom reports*

The Report Press for Exact Change is a custom report editor that allows you to create your own reports, invoices, labels, and so forth. With it, you can create a template; a file which describes a report, what data the report will include and how that data will be laid out on the printed page. That template is then used by the Exact Change program, which provides the data to the report and prints the report as described in that template file.

The report editor application is installed in the same directory where the report templates are stored. It is an application file that is, simply, named "Reports":

/Library/Application Support/Exact Change/Reports/Reports.app



All of the reports in Exact Change were created with the report editor, so you can edit any of them and see exactly how they were made. You can create a new report from scratch or simply modify an existing report in order to customize it for your needs.

There are two basic steps to designing any report:

**1) Determining what data you'd like to include in the report**

Do you want to include one line in the report for each year a coin type was minted, or just one line for each coin you actually have in your collection? A price list contains very different data than a summary of your collection.

**2) Determining how you'd like that data to be laid out on the printed page**

Reports may consist of a table of rows and columns, may have blocks of text designed to print on a 2x2 inserts, or any other layout you might imagine

When you start the report editor application, you'll notice two tabs at the bottom of the program window. These tabs, "Data" and "Design" correspond directly to these the basic report functions.

## Selecting what type of data should be included in a report

The first step in creating a report is to select the basic type of data the report will contain. The three primary options are Coins, Prices, and Series.

The report you create will include one line (or label, or whatever) for each “Piece” of data. For example, if you’re creating a report that lists all the coins in your collection you would base the report on **coins** data. The report would then print one line (or 2x2 insert, picture, etc.) *for each coin*. If you’re creating a type list you would use **series** data. This report would print one line *for each type of coin* in your collection. To create a price list you would use **prices** data so that the report includes one line *for each entry in the price list*, regardless of whether that particular coin is in your collection.

The screenshot shows the 'Exact Change Report Press [New file]' window. On the left, the 'Data type' section has three radio buttons: 'Coins' (selected), 'Prices', and 'Series'. Below it is a 'Sample Data size' field with the value '1'. The main area is titled 'Select the type of coins that should be included' and contains several options: 'Include only the one coin selected on the Coins page' (unselected), 'Include each coin even if Have, Need, Sell and Sold are all zero' (unselected), and 'Include entries of these types:' (selected). Under the last option, there are four checked checkboxes: 'Have', 'Need', 'Sell', and 'Sold'. There is also an unchecked checkbox for 'Include only coins stored here:'. Below these are two dropdown menus for 'Mint errors:' and 'Coin tracking:', both set to 'Include all coins'. A 'Type of entry:' dropdown is set to 'Coins and paper...'. At the bottom of this section are two unchecked checkboxes: 'Add missing coin varieties to the report with zero quantities' and 'Merge coins with matching sort fields'. The 'Select the order to sort coins in' section has four rows, each with a 'Sort [1-4] on' dropdown and a 'Group on this field' checkbox (all unchecked). The dropdowns are set to 'Series order', 'Year', 'Mint', and 'Variety'. To the right of each row is a 'Column Break' checkbox (all unchecked). At the bottom right of the window are 'Data' and 'Design' tabs.

Notice that each of these data types corresponds to a tab at the top of the Exact Change window; Exact Change has tabs labeled “Series”, “Prices” and “Coins”. The data type that you’re selecting here is the same data that’s displayed on the corresponding tab in Exact Change.

Of course, the type of data that you select also determines what information you can include in the report. For example, when using Series data you can include the date range in which the series was minted (i.e. 1909-1958). If you’re using coins data, you can include the coin’s value.

## Filtering the data to be included in the report.

Once the basic data type for the report has been selected, you’ll want to define some rules to distinguish which data is actually included in the report. For example, if you’re using Coins data you may want to include only coins that you have and not coins on your want list.

No matter what type of report you create, Exact Change will always include only information pertaining to the series that is currently selected on the Exact Change series editor. For example, if the “Quarters” series is selected when the report is printed then Exact Change will automatically include only coins, series or prices that are in the Quarters series or a sub-series such as Washington Quarters.

To select the data type for this report, just click on one of the three choices listed under “Data type” in the upper-left corner of the window. The report editor will then display the various filters and options that pertain to the data type that you’ve selected.

## Using “Coins” data

When creating a report based on coin data, the report will traverse through each coin in your collection and typically will print one line for each coin that should be included in the report. You could base your report on coins data if you wish, for example, to create a report that lists all the coins in your collection. The report entitled “Collection list” is an example that uses coin data. When you select to use Coin data in your report, the report editor displays a set of choices that allow you to specify exactly which coins you want to include in the report:

### **Include only the one coin selected on the coins page**

When this option is selected, the report will always include just one coin, the coin that is selected on Exact Change’s “Coins” page when the user prints the report.

### **Include each coin even if Have, Need, Sell and Sold are all zero**

When this option is selected, the report will include each coin entry within the selected series, even if the quantity is zero.

### **Include entries of these types**

This option allows you to specify which type of coin entries will be included in the report based on the quantities specified in Exact Change’s “Have”, “Need”, “Sell” and “Sold” fields. In order for a coin entry to be included in a report, it must have a quantity of one or more in any of the fields you select here. For example, if you want to report on coins you have for sale, you would select this option and check only the checkbox labeled “Sell”. The report would then include only coin entries in your collection which have a “Sell” quantity of one or more; it would not include entries that have something in the “Have” quantity but a zero in the “Sell” quantity.

### **Include only coins stored here:**

The Checkbox and list box labeled “Include only coins stored here” are used to restrict the coin list to just those coins in the collection which have a certain value in the coin’s “Stored in” field. If this checkbox is not checked, this filter is not used. So in order to utilize this filter you must check the box and select a location. This option can be useful, for example, if you wish to create a report that details the contents of your safety deposit box.

### **Mint errors**

This option is used to restrict the coin list to include or exclude mint errors. This is useful for reports that list mint errors, but it’s also useful in cases like the Series Checklist report where you don’t want to count a mint error as a typical example of a given year, mint and variety. For this reason, the choices available in this filter are “Include all coins”, “Exclude errors” and “Include only errors”.

### **Coin tracking**

This option is used to restrict the coin list to include only coin which are marked as “tracked” in the Exact Change database, or only those that are not marked as “Tracked”. This is useful in reports like 2x2 inserts, where you want to be able to select certain coins out of your collection and print a label for only those coins.

### **Type of entry**

This option is used to filter coin entries from paper money entries; a report can include either of these options or both.

### **Add missing coin varieties to the report with zero quantities**

If this box is checked, Exact Change will add records to the report as needed to assure that every Year, Mint and Variety for the selected report is included. These added records will show a have quantity of zero. This can be useful in reports where you want to include the missing varieties; you may want to show the dates for which you have no coins in your collection.

### **Select the order to sort the coins in**

The Sort order boxes provide the opportunity to specify the order in which the coins should be listed. You can sort on up to four fields. The most common sort order is by Year, mint, and variety. This would cause the report to sort all the coins by year with the oldest year first. Each coin within the same year would then be sorted by mint. Coins of the same year and mint would then be sorted by variety. You don’t have to sort by all four columns. If you want to sort by only one or two columns, just leave the extra sort boxes set to “None”. If you don’t specify any sort order at all, the coins will be listed in whatever order they’re currently displayed on Exact Change’s “Coins” page.

### **Merge coins with matching sort fields**

If this box is checked, Exact Change will combine any coin entries that share the same information in the fields on which the data is being sorted. These fields are combined only in the context of the report; this doesn’t actually merge the coin entries in your collection file. This option could be used, for example, if your report lists coin entries sorted by Year, Mint & Variety and you don’t want to add up 100 entries of 1958-D Cents but, instead, prefer to see one line with a quantity of 100.

## Using “Prices” data

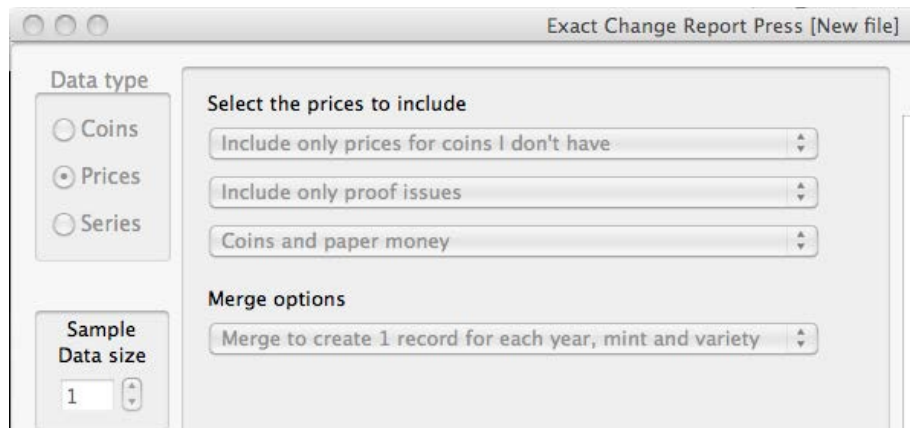
When creating a report based on price data, the report will traverse through the price list and typically will print one line for each year/mint variety that exists in the price list. That is, it prints one line in the report for each column in the price list for the currently selected series. You could base your report on price data if you wish, for example, to create a checklist report that lists each variety and indicates whether you have that variety or not. The report entitled “Series checklist” is an example that uses price data. You’ll notice that this data is a little different from the coins data because, while coins data generates a line for each coin you’ve entered into Exact Change, price data generates a line for each type of variety of coin, regardless of whether you have any such coin in your collection.

When you select to use the Prices list data in your report, the data filters are much simpler than those for Coins data. There are fewer settings needed because, for example, prices have a natural sort order (oldest to newest) whereas coin entries may be sorted by many criteria.

### Select the prices to include

The report editor offers three filters for selecting which price list entries will be included in this report.

The first filter is used to filter price list entries for coins that you don’t have, prices for coins that you do have, or to include all prices, regardless of whether you have the coin in your collection. You may want a price list that includes just the coins you have or just the coins you need in order to complete a set and this filter can be used for that purpose.



The second filter is used to filter price list entries that have a value for “Mintage” or a value for “Proofs”. Some price list entries have a figure for both “Mintage” and “Proofs” and those price list entries will be included in the report either way. When printing price list data, it’s often desirable to separate business strike pricing from proof pricing and this field can be used for that purpose.

The third filter is used to filter price list entries for coins, paper money, or both. A series in Exact Change will include either coins or paper money but you may, for example, want to include pricing only for coins if your report is intended to detail melt values.

### Merge options

Price lists in Exact Change can include a column for each year a coin was minted or (more typically) a column for each Year/Mint combination. For example, Wheat cents have a column for 1958 (P) strikes and another column for 1958-D strikes. In addition, there may be columns for notable varieties. An example of this is the “V.D.B.” cents of 1909; there are columns in the price list for 1909 and 1909-S cents, both with and without the “V.D.B.” designation. In addition, there may be several columns for coins of the same year, mint and variety, with each of these columns having only a different Grade Modifier. In the above example, there are actually 15 columns in the price list for 1909 Wheat cents; one for every combination of Philadelphia/Denver, with or without the designer’s initials, and with a grade modifier of “Red”, “Red/Brown” or “Brown”.

The “Merge options” setting is used to combine price lists entries in the report as needed. For example, the series checklist report uses this field to combine price list columns with identical grade modifiers; it would not make sense for that report to indicate that you have a given cent in red but are lacking a red-brown example.

## Using “Series” data

When creating a report based on series, the report will traverse through the series page on Exact Change and typically print one line for each series it finds within the selected series. You could base your report on series data if you wish, for example, to create a report that summarizes your holdings for each series of coin. When a report uses series data, the folders are listed in the same order as they are displayed in Exact Change.

When you select to use the Series data in your report, the data filters include a set of three choices that allow you to specify exactly which folders you want to include in the report.

The screenshot shows a dialog box titled "Exact Change Report Press [New file]". It contains several sections for configuring a report:

- Data type:** Three radio buttons are present: "Coins", "Prices", and "Series". The "Series" option is selected.
- Sample Data size:** A small input field containing the number "1" with up and down arrow buttons.
- Select the folders to include:** Three radio buttons: "Include all folders" (selected), "Include only folders with prices in them", and "Include only folders with coins in them".
- Type of entry:** Three radio buttons: "Coins only", "Paper money only", and "Coins and paper money" (selected).

### **Include all folders**

This option indicates that the report should include a line for each series within the selected series. If you select “Entire collection” and then print this report, it will include a line for each series defined in your Exact Change collection.

### **Include only folders with prices in them**

This option indicates that the report should only include those series that contain a price list. For example, the “Lincoln cent” folder would not be printed, but the “Wheat cent” and “Lincoln memorial cent” folders would. The series which contain other series, but do not themselves contain any price list entries, are filtered out and excluded from the report.

### **Include only folders with coins in them**

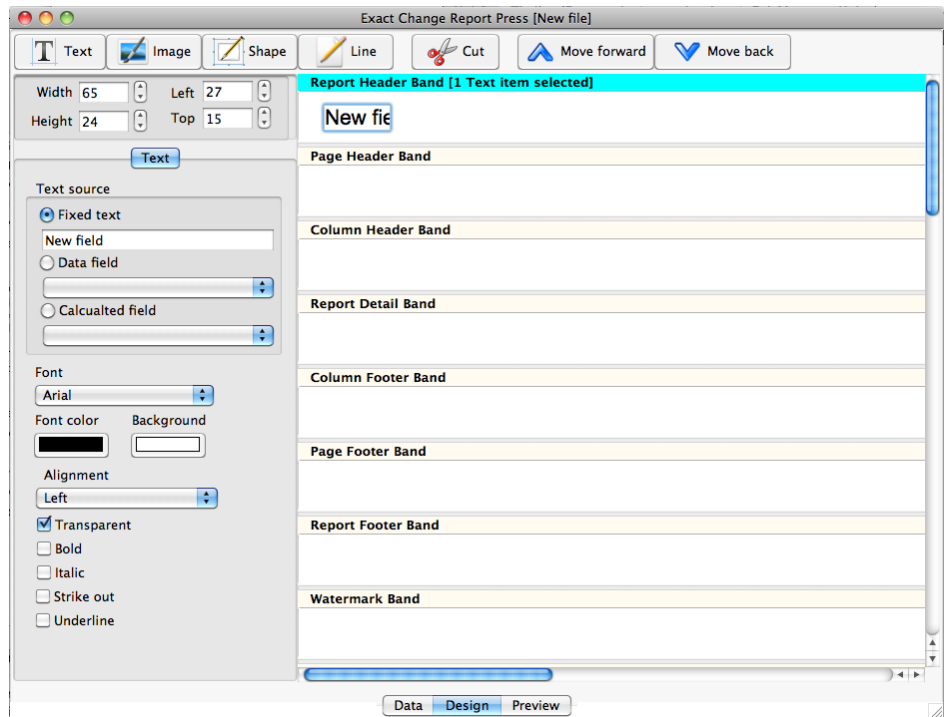
This option indicates that the report should include only those series that actually contain coins in the current collection. This causes the report to detail only the coin types that the collector is actually collecting.



## The design tab

The report press is a banded report editor, meaning that reports are divided up into bands, or sections, each of which prints at a different position. A Title band prints at the beginning of the report and a summary band prints at the very end of the report. A Header band prints at the top of every page while a footer band prints at the bottom of every page. The detail band is the workhorse of the report because it prints once for every bit of data that you selected on the “Data” tab (once for every coin entry, price list entry or series). A report may contain all of these band types or it may include only a single band.

Each band can contain a number of “Report components”. These components each produce some type of printed output on the report. For example, the “Text” component displays some designated text. So, you can create a text component, place it in the header band, and set it to say “My Report”. When this is done, each page of the report will say “My Report” at the top of the page. The process of placing components onto bands is the basis of report creation.



The diagram at right shows how the bands are laid out in a typical report. Each type of band is laid out in the report editor only once. For example, there’s only one detail band, but it may be printed many times in a report, once for each coin. Understanding the purpose of each type of band will enable you to place data in the printed report exactly where you want it. For example, since the footer band is printed at the bottom of every page, it’s a great place to put a page number.

First Page	Second page	Third page
Report header band	Page header band	Page header band
Page header band	Detail band	Detail band
Detail band	Detail band	Report footer band
Detail band	Detail band	
Detail band	Detail band	
Page footer band	Page footer band	Page footer band

You may have noticed in the above image that there are more than these five types of bands, but for now we’ll just concern ourselves with these five:

- Report Header Band: Prints at the top of the first page of the report
- Page Header Band: Prints at the top of each page
- Detail Band: Prints once for each piece of data included in the report
- Page Footer Band: Prints at the bottom of each page
- Report Footer Band: Prints at the end of the report, after the last detail band.

There are four types of report components that can be placed anywhere on these bands, they represent text, images, shapes and lines. When a report component is placed on a band, it causes something to be printed in the report at that position. The location where you place a component on a band determines where it will print on the report. For example, if you place the component on the left side of a Page Header band, that component will be displayed in the upper-left corner of every page; if you placed that component on the right side of the Page Footer band, it will be displayed in the lower-right corner of every page.

## The report components

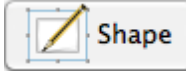
There are four types of report components that may be placed on a report band:



The Text component is the most useful of the report components, it displays either fixed text or data



The Image component displays graphical images



The Shape component displays basic shapes such as squares and circles

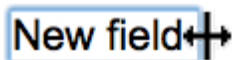


The Line component simply displays horizontal or vertical lines.

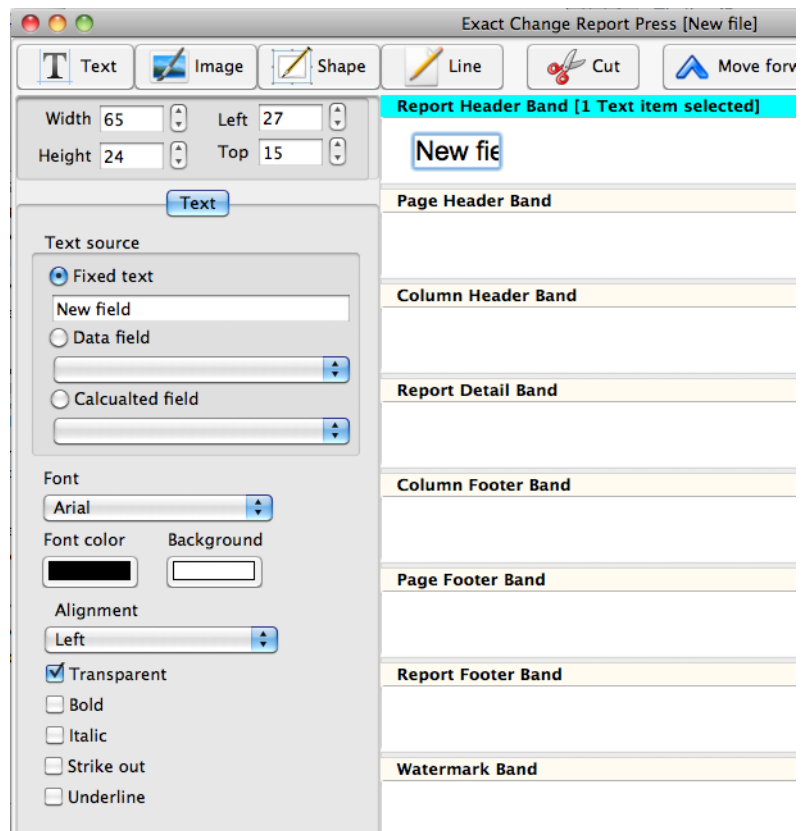
To add a component to a band, first select the band on to which you want to place the component. One band is always the “selected band” and its name is highlighted in cyan; click on the name of any band and it will become the selected band. Once the proper band is selected, you can add a component to that band by clicking any of the four buttons in the upper left corner of the screen. The report editor will place the new component on the left side of the selected band.

Try that now; select the Report Header band and then click the button that says “Text”. You’ll see the text component appear on the left side of the Report Header band. Click on that component to select it (when you select a component, the report editor draws a blue box around it. You should now see something like the image at right.

The text component is displaying the words “New field” (the generic text displayed by a text component which has not yet been configured). However, the box isn’t wide enough to display that text in its entirety. To change the size of any report component, just point your mouse cursor at one edge of the blue box, then click and drag to resize that component.



The report component can be repositioned anywhere within its band by just clicking and dragging it. In this way, you can set the size and position of any report components.







You may have noticed when you selected the text component that a lot of settings appeared on the left side of the window. These settings are used to determine what text will be displayed by the text component, as well as the font properties of that text. There are three types of text that a Text component may display:

**Fixed text:**

When you select this option, you can enter some literal text into the space provided and the text component will display exactly what you type. This is typically used to display the name of the report, or to label report columns with an identifying header like “Year” or “Mint”.

**Data field:**

A text component which displays text from a data field is truly the workhorse of any report. When you select this option, you can select any one field of data from the drop-down list and Exact Change will fill in that information when the report is printed. For example, a text band set to display the data field “Year”, will display the year assigned to each coin; another such data field could display the mint mark, another could display the variety and so forth.

**Calculated Field:**

A text component which displays a calculated field is very similar to one which displays a data field, except that the calculated field provides information, not from the database, but from the report itself. This includes data such as the page number and the current time or date.

In summary, the detail band is printed once for each coin in your report and the text component prints one field of data about each coin, so the detail band represents rows in the report and the text components make up the columns of a report. As we’re creating the report, we have no way of knowing how many coins will be included in the report when it’s printed inside the Exact Change program; the program will take care of duplicating the detail band once for every coin entry that meets the criteria that we established on the report editor’s “Data” page. Since the detail band is printed over and over, any text component placed on it will create a column of data in the report. If you understand this one key concept; you’ve got the basic understanding of how any banded report editor works.

1909		
1909	S	
1909	S	V.D.B.
1910		
1910	S	

When a text component is selected, a number of font property options are available for selecting the font name, color and so forth. Most of these are self evident but you may be surprised that there is no setting for the font size. The reason is that the font size is determined by the size of the text component itself. If you change the height of the text component by dragging its top or bottom edges up or down, you’ll see that the font size changes to occupy the height of the text component. You can also set the height of the text component by adjusting the “Height” setting in the upper left corner of the window; a method that provides greater precision. If you have a text component selected when adding another text component, the new component will automatically have the same height as the previously selected component. This makes it easy to create a series of text components of identical size.



The image component works very much like the text component but, as you've probably guessed, it displays images rather than text. There are two types of images it may display:

**Database image:**

This is an image drawn from the Exact Change database. It may include the series obverse or reverse images (the "stock" images displayed on Exact Change's "Series" page to represent a typical coin from that series) or it may display the coin obverse or reverse image (the pictures, if any, of each particular coin in your collection that is included in this report).

**Specific image:**

When you specify a specific image, you can select an image file that contains a picture that you'd like to include in the report. This can be used to include your logo on any reports; most of the stock reports include the Exact Change application icon beside the report title.



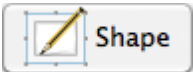
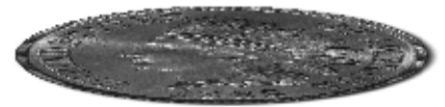
There are two additional settings that apply to image components:

**Stretch:**

If an image won't fit in the space provided for the image component, the report will clip the image and display only as much as can fit. The "Stretch" option, if checked, will cause the image to be scaled up or down until it fits correctly within the space provided.

**Proportional:**

When an image stretches to fit within the space provided by the image component, this may cause the image's height to width ratio to change; if you try to display a round coin in a rectangular shaped image component, the result is usually an oval-looking coin image. By checking the "Proportional" checkbox, you instruct the report to maintain the image's aspect ratio. A stretched image will stretch to fill the width or height provided but will only stretch to fill the more restrictive of the two dimensions.



The shape component displays standard shapes such as rectangles and circles; typically this component is used to add style to a report layout. Most of the stock reports include a rectangle around the Report Header band and that rectangle is created with a shape component. When you select a shape component, there are various settings to control the color and style of the shape.



The line component displays horizontal or vertical lines; it is typically used for things like visually separating columns within a report or to highlight totals displays in the Report Footer band.

## Adjusting band sizes

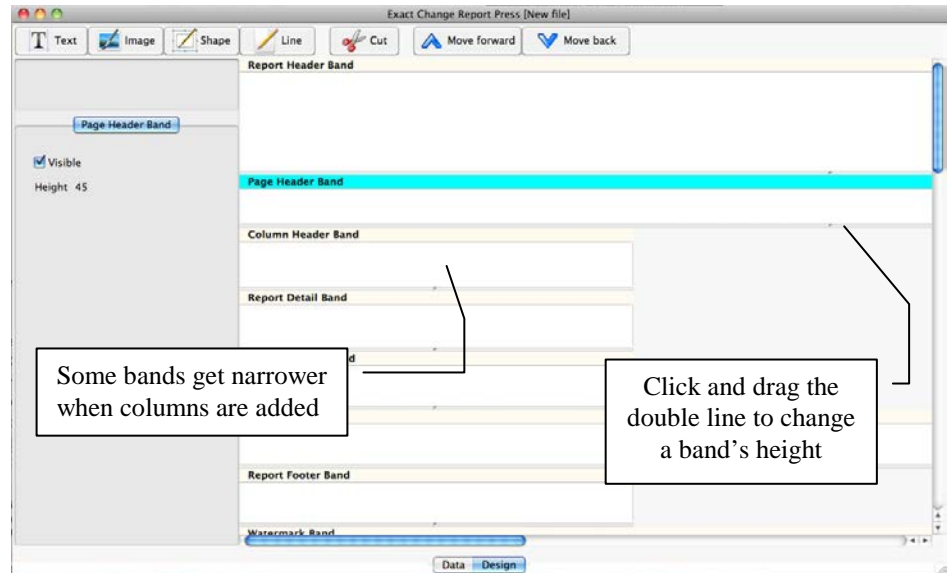
In the “Reports” menu at the top of the screen is a menu option labeled “Columns” which can be used to set the number of columns on each page of the report. Notice that when you select two or more columns, some report bands shrink in width while others do not. The reason of this is that some report bands, such as the Detail band, are just one column wide while others, such as the Page Header band, stretch across the entire page. The width of the band is relative to the width that the band will occupy on the printed report.

The height of a band can be adjusted by clicking and dragging the double line at the bottom of a band. This will increase or decrease the vertical space that the band occupies and allows for more room in which to fit additional report components. Typically, if you’re going to include images in a band, then that band is going to need to be taller than the default height in order for the image to be of reasonable size.

When you select a band by clicking on the band’s name, a checkbox labeled “Visible” will appear on the left side of the window. Removing the checkmark from this checkbox will cause that band to not be included in the report.

## Additional band types

Since we’ve now covered how to set up columns in a report, there are two additional types of report bands which may be used in a report, the Column Header band and the Column Footer band. These bands appear at the top and bottom of each column just as the Page Header band and Page Footer bands appear at the top of each page.



## Grouping coin data

Previously, we discussed how to sort coin entries in whichever order you wish. In addition to determining the order in which coins are listed, you can create groups by checking any of the checkboxes labeled “Group on this field”. A group is just a set of coin entries that have the same value.

In the example at right, coin entries are sorted and grouped by coin type; every coin entry that is of the same coin type will be included in a single group. When an entry of a different coin type comes up, a new group is started.

Select the order to sort coins in

Sort 1st on	<input checked="" type="checkbox"/> Group on this field	<input type="checkbox"/> Column Break
<input type="text" value="Series order"/>		
Sort 2nd on	<input type="checkbox"/> Group on this field	<input type="checkbox"/> Column Break
<input type="text" value="Year"/>		
Sort 3rd on	<input type="checkbox"/> Group on this field	<input type="checkbox"/> Column Break
<input type="text" value="Mint"/>		
Sort 4th on	<input type="checkbox"/> Group on this field	<input type="checkbox"/> Column Break
<input type="text" value="Variety"/>		

Groups are used to take advantage of two additional report band types, the Column Group Header band and the Column Group Footer band. The Column Group Header band appears at the beginning of a new group and the Column Group Footer band appears at the end of a group.

A report can group on more than one field. In that case, the report will have a new group if either field changes from one coin entry to another. Were we to check all four of the “Group on this field” boxes in the above example, then a new group would be created for every combination of coin type, year, mint and variety.

**Series Checklist**

<input type="checkbox"/> 1909	<input type="checkbox"/> 1939
<input type="checkbox"/> 1909 (V.D.B.)	<input type="checkbox"/> 1939-D
<input type="checkbox"/> 1909-S	<input type="checkbox"/> 1939-S
<input type="checkbox"/> 1909-S (S over horizont	<input type="checkbox"/> 1940
<input type="checkbox"/> 1909-S (V.D.B.)	<input type="checkbox"/> 1940-D
<input type="checkbox"/> 1910	<input type="checkbox"/> 1940-S
<input type="checkbox"/> 1910-S	<input type="checkbox"/> 1941
<input checked="" type="checkbox"/> 1911	<input type="checkbox"/> 1941-D
<input type="checkbox"/> 1911-D	<input type="checkbox"/> 1941-S
<input type="checkbox"/> 1911-S	<input type="checkbox"/> 1942
<input type="checkbox"/> 1912	<input type="checkbox"/> 1942-D
	<input type="checkbox"/> 1942-S
	<input type="checkbox"/> 1943 (Steel)

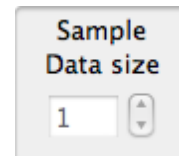
The series Checklist report uses the Column Group Header band to designate the start of a new coin type. In the example at left, the Column Group Header band indicates the beginning of the listing for Wheat Cents. Once the report lists all the Wheat Cents, it will print a new Column Group Header band with the name of the next coin type.

## Adding summaries and totals

A text component placed on in the Report Detail band will display some particular data about each coin entry as the report progresses through all the coins included in the report. To add a total, simply place that same text component in any of the other bands. For example, a text component that displays a coin's value will, if placed in the Report Footer band, display the total value of all coins in the report. Similarly, if that text component were placed in a Column Group Footer band, it would display the total value for all coins within a group. The report named "Collection List" has a number of text components that are duplicated in the Detail Band, Column Group Footer band and the Report Footer Band. This provides data about each coin as well as totals for each coin type and totals for the entire report.

## Previewing your report

Once you place the first report component anywhere on a report, a tab labeled "Preview" will appear at the bottom of the window. This tab provides an opportunity to see what the final result of your report design will look like. The report editor, however, doesn't have access to your collection file so it uses some generic coin data instead. The data in the report editor's preview, unlike the preview in Exact Change, is fictitious because it's just meant to show you what the report will look like. The size of this fictitious coin collection can be adjusted by setting the "Sample Data Size" setting on the left side of the "Data" tab. This enables you to see what your report will look like when reporting on a database with just a few entries, or you can increase the size of the sample database in order to see how your report will appear when it takes up several pages.



## Adding a report description

On the "Data" tab is a large box labeled "Report Description". If you enter any text in this box, it will appear in Exact Change whenever your report is selected from the list of available reports. This can be used to describe the purpose of the report or provide any notes that pertain to the report.

## Loading and saving report templates

The "File" menu at the top of the screen provides menu options for loading and saving reports in the report editor. When you save a report, you'll be prompted to specify a name for the report file. This will then create a file which Exact Change can read in order to offer your report in the list of available reports. Note that Exact Change creates the list of available reports when the program starts, so if you create a new report, it will appear after the next time that Exact Change starts.

When you save a report, the report editor creates a single file on the drive with whatever file name you specify. If you wish to share the report with another Exact Change user, just provide them with a copy of the file you saved. If they copy the file into their reports folder, the report will be available to them when they load Exact Change. You may freely share any reports you create, but the recipient must be a licensed user of Exact Change.

Often you may not need to create a report from scratch, but rather, you may just need to make some alterations to an existing report in order to customize it for your specific needs. All of the reports in Exact Change were created with the report editor and can therefore be loaded into the report editor and modified as you wish. It's a good idea, if you modify a stock report, to give it a new name when saving your work. This assures that your changes won't be lost if, at some point, you download a program update which includes the stock version of that report file.

There are a series of reports in Exact Change titled "Theme checklist for Bi-metallic", "Theme checklist for Birds", "Theme checklist for Turtles" and so forth. These are actually all one report, from a single report file. When you include in the report's name the word [THEME] (with the square brackets), Exact Change treats the report in a special way. For every collection theme in Exact Change (they're listed on the "Info" tab), Exact Change will include a copy of any such named report, replacing the word [Theme] with the actual names of each theme. Provided that the report is based on Folders data, Exact Change will automatically skip over any folders that are not part of the theme for each of these reports.




## The Coins data set



Name	Type	Description	Example
Administration	Text	The names of the U.S. President and Vice President in office at the time the coin was minted. In cases where there were 2 or 3 presidents in office in the same year, the President who was in office the majority of the year will be listed.	George Washington/ John Adams
Age of coin	Number	The age of the coins in years. This is the current year, minus the year in which the coin was minted.	78
Catalog number	Text	The coin's KM number	101
Change	Number	The amount that the coin has increased or decreased in value. This is the current value minus the purchase price.	\$35.00
Coin name	Text	The name of the folder in which the coin resides. This is the coin's folder name from the series page in Exact Change.	Barber dime (1892-1916)
Coin obv file	Text	The file name of the coin's obverse image. This is the obverse image that may appear on the Images page, not the Series page.	MyCoinObv.jpg
Coin obv path	Text	The full path name of the coin's obverse image. This is the obverse image that may appear on the Images page, not the Series page.	/Coins/MyCoinObv.jpg
Coin rev file	Text	The file name of the coin's reverse image. This is the obverse image that may appear on the Images page, not the Series page.	MyCoinRev.jpg
Coin rev path	Text	The full path name of the coin's reverse image. This is the obverse image that may appear on the Images page, not the Series page.	/Coins/MyCoinRev.jpg
Coin receipt file	Text	The file name of the coin's receipt image which appear on the Images page	MyReciept.jpg
Coin receipt path	Text	The full path name of the coin's receipt image which appear on the Images page	/Coins/MyReciept.jpg
Comment	Text	The text of the coin's comment field	Old holder
Country	Text	The name of the Primary series in which this coin resides. That is, the series right below "Entire collection" which you first click on to navigate to this coin type.	Albania
Deflated value	Number	The current value of the coin, reverse adjusted for inflation back to the year the coin was minted. For example, suppose you have a coin which was minted in 1850 and is now worth \$1000. This is the amount of money someone in 1850 would need to have had in order to have the same buying power as \$1000 would give you today.	\$5.65
Deviation: Average	Number	The difference between this coins grade and the value derived by averaging all other coins from this series.	1.28
Deviation: Top	Number	The difference between the coin's grade and the value derived by averaging the highest grade for each variety in the series.	-3.58



Dividend	Number	This is the rate of return yielded from the coin's face value to its current value over the coin's age. For example, if the coin had been deposited in a bank in the year it was minted, this is the interest rate (compounded daily) you would need to get in order to have the same amount in your account as the coin's current value.	8.75%
Extended change	Number	The amount that the coin has increased or decreased in value, multiplied by the number of coins of this type you have.	\$20
Extended markup	Number	The difference between the "Buy Price" and "Sell price" of the coin, multiplied by the "Sold" number for the coin.	\$36
Extended purchase price	Number	The amount that was paid for the coin, multiplied by the number of coins of this type you have. For example, if you entered 40 coins purchased for 1 dollar each, then the extended purchase price would be \$40	\$40
Extended value	Number	The current value of the coin according to Exact Change's price list, multiplied by the number of coins of this type you have.	\$60
Face value	Number	The face value of the coin	\$1
Face value text	Text	A textual description of the coin's face value	One dollar
Folder number	Number	Each folder in Exact Change has a unique number just as each coin has a unique item number. This field is of nominal usefulness, but was included for completeness.	123
G4 value ... Proof-70 value	Number	There are a total of 34 fields which represent the coin's value in each grade	\$180
Silver content	Number	The actual gold weight of the coin	.1257
Extended siver	Number	The actual gold weight of the coin, multiplied by the "Have" quantity.	1.257
Gold content	Number	The actual gold weight of the coin	.1257
Extended gold	Number	The actual gold weight of the coin, multiplied by the "Have" quantity.	1.257
Palladium content	Number	The actual palladium weight of the coin	.1257
Extended palladium	Number	The actual palladium weight of the coin, multiplied by the "Have" quantity.	1.257
Platinum content	Number	The actual platinum weight of the coin	.1257
Extended platinum	Number	The actual platinum weight of the coin, multiplied by the "Have" quantity.	1.257
Metal content	Number	The precious metal content of the coin, regardless of what that metal is.	.1257
Extended metal content	Number	The precious metal content of the coin, regardless of what that metal is, multiplied by the "Have" quantity.	1.257
Grade	Text	The grade assigned to the coin	MS-60
Grade modifier	Text	The adjective that adds detail to the coin's numeric grade.	FBL
Grade & modifier	Text	The coin's grade and grade modifier	MS-64RD
Name, Grade & GM	Text	The coin's Year, Mint, Variety, grade and Grade modifier	1964-D DDO MS-64FBL
Grade row number	Number	The row on the price grid which represents values for this coin's grade. G-4 is 0, Proof 70 is 33	20
Graded by	Text	The grader or grading service that designated the coin's grade.	NGC
Have	Number	The number of coins of this type that you have	1

Inflated value	Number	This is the face value of the coin, adjusted for inflation from the year the coin was minted. For example, suppose you have a \$5 coin minted in 1850. This is the amount of money you would need today to have the same buying power as a person would have had if they had just spent the coin back in 1850.	\$168
Interest 1 percent ... Interest 15 percent	Number	There are 15 fields which represent interest rates from 1% to 15%. This is the amount of money you would have if you had invested the coin's face value at the specified interest rate since the year that the coin was minted.	\$1800
Inventory number	Number	The item number used by Exact Change to track the coin. This number can be used in the "Locate a coin by item number" window to quickly locate the coin.	1234
Lock buy price	Yes/No	Indicates weather the coin's value has been locked to its "Buy" price.	Yes
Lock sell price	Yes/No	Indicates weather the coin's value has been locked to its "Sell" price.	No
Markup	Number	The difference between the "Buy Price" and "Sell price" of the coin.	\$12.00
Metal type	Text	The metallic composition of the coin	Brass/steel
Mint error	Yes/No	Indicates weather the coin has been designated as a mint error	No
Extended markup	Number	The difference between the "Buy Price" and "Sell price" of the coin, multiplied by the number sold.	\$120.00
Markup percent	Number	The percentage of difference between the "Buy price" and "Sell price" of the coin.	
Mint mark	Text	The coin's mint mark	S
Mintage	Text	The number of coins of this type that where minted. If the value is greater than one billion, the field will automatically be displayed as "X.XX Billion"	1.23 Billion
Mintage set	Text	The number of coins of that type that were minted, followed by the Proof quantity in parenthesis	1.23 Billion (146,000)
Name & grade	Text	The coins year and mint mark, variety, and grade	1901-S 1 over 0 MS-60
Need	Number	The number of coins of this type that you need	1
Notes	Memo	The comments entered into the "Notes" area for this coin	This coin is for Junior's birthday present.
Parent folder list	Text	The name of the coin series, with the names of each series in which that series resides. For example: United States\Quarters\Washington Quarter\Washington Quarter, Silver	
Population	Number	The number of coins which have been certified at the same grade as this coin	13
Population =>	Text	The number of coins which have been certified at the same grade as this coin, followed by the number that have been certified at any higher grade. Proof coins are not grouped with business strikes in this calculation. Exact Change does not consider a Proof-60 coin to be a higher grade than an MS-70 coin just because they're listed in that order. Instead, they are an entirely different type of coin.	13/11
Population Series	Number	The number of coins of this coin type (regardless of year) that have been certified at this grade.	12



Population Series =>	Text	The number of coins of this coin type, regardless of year, which have been certified at the same grade as this coin, followed by the number that have been certified at any higher grade. Proof coins are not grouped with business strikes in this calculation. Exact Change does not consider a Proof-60 coin to be a higher grade than an MS-70 coin just because they're listed in that order. Instead, they are an entirely different type of coin.	40
Population total	Number	The total number of coins of this variety that have been certified in any grade	43
President	Text	The name of the U.S President in office at the time the coin was minted.	George Washington
Proof Mintage	Text	The number of coins of this type that were minted as proof coins.	146,000
Purchase date	Date	The date on which the coin was purchased	11/15/1998
Purchase price	Number	The amount that was paid for the coin	\$50.00
Sell	Number	The number of coins of this type that you want to sell	1
Sell price	Number	The value for which the coin is being sold	\$90
Series number	Number	A unique number assigned to each coin series by Exact Change	10435
Series info	Rich text	The text that appears in on the Info tab for this series in Exact Change.	This photo courtesy of <b>Wild Man Software</b>
Series absolute index	Number	This number indicates the order in which the series is listed in Exact Change's series editor. For example, "Entire collection" has a series absolute index of zero, the next folder below it is one, and so forth.	5
Coin obverse image	Image	The obverse image of the coin. This is the image associated with the coin on Exact Change's "Image" page.	
Coin obv file	Text	The name of the file that holds the obverse image of this coin. This is the obverse image that appears on the "Images" page	Obverse.jpg
Coin obv path	Text	The full path of the file that holds the obverse image of this coin. This is the obverse image that appears on the "Images" page	/Coins/Obverse.jpg
Coin reverse image	Image	The reverse image of the coin. This is the image associated with the coin on Exact Change's "Image" page.	
Coin rev file	Text	The name of the file that holds the reverse image of this coin. This is the reverse image that appears on the "Images" page	Reverse.jpg
Coin rev path	Text	The full path of the file that holds the reverse image of this coin. This is the reverse image that appears on the "Images" page	/Coins/Reverse.jpg
Series obverse image	Image	The obverse image used to represent this coin's folder on Exact Change's "Series" page.	
Series obv file	Text	The name of the file that holds the obverse image of this coin type. This is the obverse image that appears on the "Series" page	Obverse.jpg

Series obv path	Text	The full path of the file that holds the obverse image of this coin type. This is the obverse image that appears on the “Series” page	/Coins/Obverse.jpg
Series reverse image	Image	The reverse image used to represent this coin’s folder on Exact Change’s series page.	
Series rev file	Text	The name of the file that holds the reverse image of this coin type. This is the reverse image that appears on the “Series” page	Reverse.jpg
Series rev path	Text	The full path of the file that holds the reverse image of this coin type. This is the reverse image that appears on the “Series” page	/Coins/Reverse.jpg
Receipt	Image	The image of the receipt for the coin, if any, which is attached to the coin on the images tab of Exact Change.	
Coin receipt file	Text	The name of the file that holds the receipt image for this coin. This is the receipt image that appears on the “Images” page	Receipt.jpg
Coin receipt path	Text	The full path of the file that holds the receipt image for this coin. This is the receipt image that appears on the “Images” page	/Coins/Receipt.jpg
Selected	Yes/No	Indicates weather the coin is currently selected (highlighted) on the “Coins” page. There may be multiple coins selected at one time.	Yes
Size	Text	The size of the coin	32.6mm
States in union	Number	The number of U.S. states at the time the coin was minted	48
Sold	Number	The number of coins of this type that you have sold	1
Stored in	Text	The text that indicated where the coin is being stored	Bank box
Time owned	Text	The difference between the purchase date and today’s date. This is the amount of time that has elapsed since the coin was purchased	1y/6m/24d
Tracked coin	Yes/No	Indicates weather the coin is currently marked as tracked	Yes
Value text	Text	The current value of the coin according to Exact Change’s price list. This is a text field so it can display adjectives like “Rare” and “Proof only”. Values that can be resolved to a numeric value, such as “Melt” or “Split 30%” are automatically resolved.	\$85.30
Extended value text	Text	The current value of the coin according to Exact Change’s price list, multiplied by the Have quantity. This is a text field so it can display adjectives like “Rare” and “Proof only”. Values that can be resolved to a numeric value, such as “Melt” or “Split 30%” are automatically resolved.	\$853.00
Value amount	Number	The current value of the coin according to Exact Change’s price list. This is a number field so that it can be totaled.	85.30
Extended value amount	Number	The current value of the coin according to Exact Change’s price list, multiplied by the Have quantity. This is a number field so that it can be totaled.	853.00
Variety	Text	The coins variety designation	1 over 0
Vice President	Text	The name of the U.S. Vice President in office at the time the coin was minted.	John Adams
Year	Number	The year the coin was minted	1901

Year & mint	Text	A combination of the coin's year and mint mark, separated by a dash.	1901-S
Year, Mint & Variety	Text	The coin's year and mint mark, followed by the variety	1901-S 1 over 0

## The Prices data set

Name	Type	Description	Example
Administration	Text	The names of the U.S. President and Vice President in office at the time the coin was minted. In cases where there were 2 or 3 presidents in office in the same year, the President who was in office the majority of the year will be listed.	George Washington/ John Adams
Best business	Text	The highest grade of any business strike coins of this variety in the collection	MS-63
Best Grade	Text	This is the highest grade of all the coin's in your collection of this year, mint, and variety. If there are no coins in your collection of this type, this field will be blank.	AU-50
Best proof	Text	The highest grade of any proof coins of this variety in the collection	PF-68
Catalog number	Text	The KM number for coins of this year and type	12.3a
Coin name	Text	The name of the folder which this price list is for. This is the folder name from the series page in exact change.	Barber dime (1892-1916)
Series number	Number	A unique number assigned to each coin series by Exact Change	10345
Series absolute index	Number	This number indicates the order in which the series is listed in Exact Change's series editor. For example, "Entire collection" has a series absolute index of zero, the next folder below it is one, and so forth.	5
County	Text	The name of the county to which this price list entry belongs.	Albania
Face value	Number	The face value of the coin	\$1
Face value text	Text	A textual description of the coin's face value	One dollar
G4 value ... Proof-70 value	Number	There are a total of 34 fields which represent the coin's value in each grade	\$180
Gold content	Number	The actual gold weight for coins of this year and type.	.0457
Grade modifier	Text	A descriptor to differentiate coins of the same year and mint. For example, copper coins are often designated as RD (red), RB (Red-Brown) and BN (Brown).	RD
Have G-4 ... Have Proof-70	Number	There are a total of 34 fields which represent the number of coins of this year and type in your collection in each grade	5
Have business	Yes/No	A yes or no value that indicates whether there are any business strike coins of this year, mint, and variety in your collection. This field will be "Yes" only if the collection contains a business strike example of the variety.	Yes



Have It	Yes/No	A yes or no value that indicates whether there are any coins of this year, mint, and variety in your collection. This field is used in the series checklist reports to indicate whether there should be a check in the box by this type. This field will be “Yes” if the collection contains either a proof or business strike example of the variety.	Yes
Have proof		A yes or no value that indicates whether there are any proof coins of this year, mint, and variety in your collection. This field will be “Yes” only if the collection contains a proof example of the variety.	Yes
Metal content	Number	The precious metal content for coins of this year and type, regardless of metal type.	.0457
Metal type	Text	The metallic composition for coins of this year and type.	Aluminum-Bronze
Mintage	Text	The number of coins of this type that were minted. If the value is greater than one billion, the field will automatically be displayed as “X.XX Billion”	1.23 Billion
Mintage set	Text	The number of coins of that type that were minted, followed by the Proof quantity in parenthesis	1.23 Billion (146,000)
Parent folder list	Text	The name of the coin series, with the names of each series in which that series resides. For example: United States\Quarters\Washington Quarter\Washington Quarter, Silver	
Palladium content	Number	The actual palladium weight for coins of this year and type.	.0457
Platinum content	Number	The actual platinum weight for coins of this year and type.	.0457
Population G-4 ... Population Proof-70	Number	There are a total of 34 fields which represent the population count of coins certified in each grade.	25
President	Text	The name of the U.S President in office at the time the coin was minted.	George Washington
Proof Mintage	Text	The number of coins of this type that were minted as proof coins.	146,000
Series info	Rich text	The text that appears in on the Info tab for this series in Exact Change	This photo courtesy of <b>Wild Man Software</b>
Series obverse image	Image	The obverse image used to represent this coin’s folder on Exact Change’s “Series” page.	
Series obv file	Text	The name of the file that holds the obverse image of this coin type. This is the obverse image that appears on the “Series” page	Obverse.jpg
Series obv path	Text	The full path of the file that holds the obverse image of this coin type. This is the obverse image that appears on the “Series” page	/Coins/Obverse.jpg
Series reverse image	Image	The reverse image used to represent this coin’s folder on Exact Change’s “Series” page.	
Series rev file	Text	The name of the file that holds the reverse image of this coin type. This is the reverse image that appears on the “Series” page	Reverse.jpg
Series rev path	Text	The full path of the file that holds the reverse image of this coin type. This is the reverse image that appears on the “Series” page	/Coins/Reverse.jpg



States in union	Number	The number of U.S. states at the time the coin was minted	48
Silver content	Number	The actual silver weight for coins of this year and type.	.0457
Vice President	Text	The name of the U.S. Vice President in office at the time the coin was minted.	John Adams
Year & mint	Text	A combination of the coin's year and mint mark, separated by a dash.	1909-S
Year, Mint & Variety	Text	A combination of the coin's year, mint mark, and variety	1909-S (V.D.B.)

## The Folders data set

Name	Type	Description	Example
Average business grade	Number	The average grade of all business strike coins in the series.	64.32
Average have value	Number	The average value of all the "Have" coins in the folder	\$14.50
Average need value	Number	The average value of all the "Need" coins in the folder	\$14.50
Average proof grade	Number	The average grade of all proof coins in the series.	67.89
Average sell price	Number	The average sell price of all the "Sell" coins in the folder	\$14.50
Average sold price	Number	The average sell price of all the "Sold" coins in the folder	\$14.50
Average top business	Number	The average grade derived from just the highest graded business strike coin for each variety.	65.86
Average top proof	Number	The average grade derived from just the highest graded proof coin for each variety.	68.21
Best grade	Text	The highest grade of all the coins contained in the folder.	MS-65
Country	Text	The name of the country which minted this coin type.	Albania
Date range	Text	The date range in which coins of this type were minted.	1923-1948
Date start	Number	The first year in which coins of this type were minted.	1923
Date stop	Number	The last year in which coins of this type were minted.	1948
Duration	Number	The number of year which the coin was authorized, including years in which no examples were minted. For example, the Susan B. Anthony dollar was first produced in 1979 and last in 1999. The duration for this coin is then 21, even though the coin bears one of only four possible dates	21
Ending Administration	Text	The name of the U.S. President and Vice President at the time the series was discontinued.	George Washington/ John Adams
Ending President	Text	The name of the U.S. President at the time the series was discontinued.	George Washington
Ending Vice President	Text	The name of the U.S. Vice President at the time the series was discontinued.	John Adams
Face value	Number	The face value of the coin series contained in the folder	.10
Face value text	Text	The written version of the coin's face value	Ten cents
Folder name	Text	The name of the folder as it appears on the series page	Barber dime (1892-1916)
Folder text	Rich Text	The text displayed on the "Info" tab of the series page when the folder is selected	
Has image	Yes/No	Indicates whether this series has an obverse image attached to it.	Yes

Have one	Yes/No	A yes or no value that indicates whether there are any coins of this year, mint, and variety in your collection. This field is used in the type checklist report to indicate whether there should be a check in the box by this type.	Yes
Have quantity	Number	The total number of "Have" coins in the folder. This is the sum of the "Have" values for each entry in the folder.	100
Have varieties	Number	The number of different varieties owned for the folder.	20
Indented name	Text	The name of this series, preceded by five spaced for each level this series is nested within the series editor. This can be used to indent series names as they appear on the series editor itself.	Lincoln Cents
Mintage	Text	The total mintage for the series contained in the folder.	3.56 Billion
Need quantity	Number	The total number of coins needed for the folder. This is the sum of the "Need" values for each entry in the folder.	100
Obverse image	Image	The obverse image of the coin. This is the obverse image displayed on the series page.	
Obverse file name	Text	The name of the file that holds the obverse image of this coin type. This is the obverse image that appears on the "Series" page	Obverse.jpg
Obverse path	Text	The full path of the file that holds the obverse image of this coin type. This is the obverse image that appears on the "Series" page	/Coins/Obverse.jpg
Parent folder list	Memo	A list of all the folders in which this folder is contained. That is, all the folders that must be opened to get to this folder.	Cents Small cents Lincoln Cents
Reverse image	Image	The reverse image of the coin. This is the reverse image displayed on the series page.	
Reverse file name	Text	The name of the file that holds the reverse image of this coin type. This is the reverse image that appears on the "Series" page	Reverse.jpg
Reverse path	Text	The full path of the file that holds the reverse image of this coin type. This is the reverse image that appears on the "Series" page	/Coins/Reverse.jpg
Sell quantity	Number	The total number of coins for sale in the folder. This is the sum of the "Sell" values for each entry in the folder.	100
Series number	Number	A unique number assigned to each coin series bay Exact Change	10435
Series absolute index	Number	This number indicates the order in which the series is listed in Exact Change's series editor. For example, "Entire collection" has a series absolute index of zero, the next folder below it is one, and so forth. Each series is counted, even if they're not included in this report.	5
Series relative index	Number	This number indicates the order in which this series is listed in this report. The first series listed will have a Series relative index of 1, the next series will be 2, and so forth. Only series which are included in this report will be counted.	3
Set value G4 ... Set value Proof-70	Number	The total value of a complete set for the series, at the given grade.	\$3609.25

Series info	Rich text	The text that appears in on the Info tab for this series in Exact Change.	This photo courtesy of <b>Wild Man Software</b>
Series number	Number	The number that uniquely identifies this coin series. The series number is displayed on the “Info” tab in Exact Change.	12472
Sold quantity	Number	The total number of coins sold from the folder. This is the sum of the “Sold” values for each entry in the folder.	100
Starting Administration	String	The name of the U.S. President and Vice President at the time the series was first issued.	George Washington/ John Adams
Starting President	String	The name of the U.S. President at the time the series was first issued.	George Washington
Starting Vice President	String	The name of the U.S. Vice President at the time the series was first issued.	John Adams
Total have value	Number	The total value of all the “Have” coins, according to the Exact Change price list	\$389.34
Total need value	Number	The total value of all the “Need” coins, according to the Exact Change price list	\$389.34
Total population	Number	The number of coins of this series which have been certified in any grade.	1554
Total sell price	Number	The total value of all the “Sell” coins, according to the sell price of each coin	\$389.34
Total sold price	Number	The total value of all the “Sold” coins, according to the sell price of each coin.	\$389.34
Total varieties	Number	The total number of varieties contained in the folder. This equates to the number of columns in the folder’s price list.	134
X of Y Varieties	Text	The total number of varieties owned, followed by the number of varieties contained in the folder. The number of varieties in the folder equates to the number of columns in the price list for the folder.	Have 20 of 134 varieties
Year count	Number	The number of years in which the coin was actually minted. For example, the year count for the Susan B. Anthony dollar is 4, even though the coin was minted in four years which spanned more than two decades.	4

## Calculated fields

Name	Description	Example
Collection file name	The directory and file name of the collection database currently in use.	/Coins/MyCoins.ECD
Report name	The name of the report file. You could simply retype this name into a label component. But this field allows you to create a standard report header that can be copied and pasted from one report to another.	Collection list
Date	The current date. That is, the date on which the report is printed, not the date on which the report template was created.	3/15/17
Time	The current time; the time at which the report is printed.	10:44
Serial number	This is the serial number assigned to your licensed copy of Exact Change and is unique to each registered copy of the program.	51461
Page number	The page number of the current page.	Page 1
Page set	The page number relative to the total number of pages in the report	Page 1 of 20

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The cover image of this manual is an engraving from the 1895 Report Of The Director Of The Mint

