

ADVANCED REPORT MODIFICATIONS

MODIFYING REPORTS

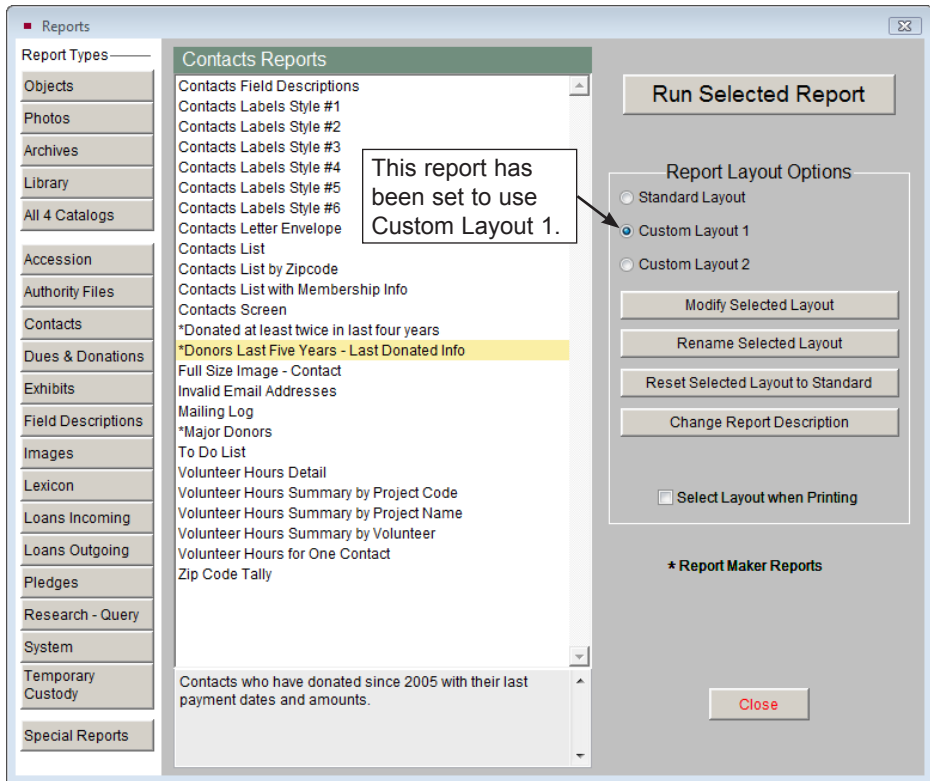
Not only does PastPerfect come with over 300 built-in reports and a Report Maker to create your own reports, but it also enables you to customize all of your reports. You can select which fields appear on reports and how they are displayed, including the arrangement on the page, font sizes, titles, and color. You can also change the page setup, group records, and add calculations to reports.

The Reports screen contains **Report Layout Options** that allow you to modify two custom layouts, rename your custom layouts, reset a report to the standard layout, change the report's description, and create a new layout for label reports. The screen in Figure 19-1 shows a report set to use Custom Layout 1. You may also activate a feature that enables you to select which layout you want to use when you preview or print each report. PastPerfect saves the two modified layouts and the standard layout.

NOTE

It is important to note that when you use the Reset Selected Layout to Standard option, the report will be reset to the standard layout erasing any changes you have made to your custom layout. Your custom layout name will still appear, but your modifications will be deleted.

Figure 19-1
Reports
screen



To modify a report, go to the **Reports** menu from the Main Menu and select a **Report Type** from the left Sidebar. You will see a list of reports for that type, including predefined and Report Maker reports. Report Maker reports are marked by an asterisk. Click once on the report name from the list, choose either Custom Layout 1 or Custom Layout 2 and click the **Modify Selected Layout** button. This takes you to the Report (or Label) Designer screen, seen in Figure 19-2. You may need to enlarge this screen by clicking on the Windows “Maximize” button in the upper right corner. The Report Designer screen shows you the text and database fields that appear on the report as well as tools for customization.

This chapter explains how to use these powerful and practical tools to get the reports you want, then provides some examples of common report modifications.

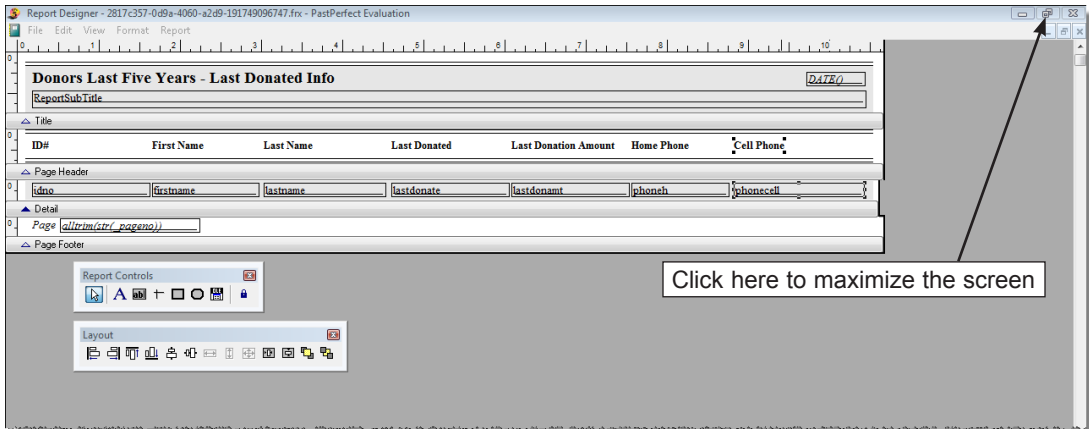
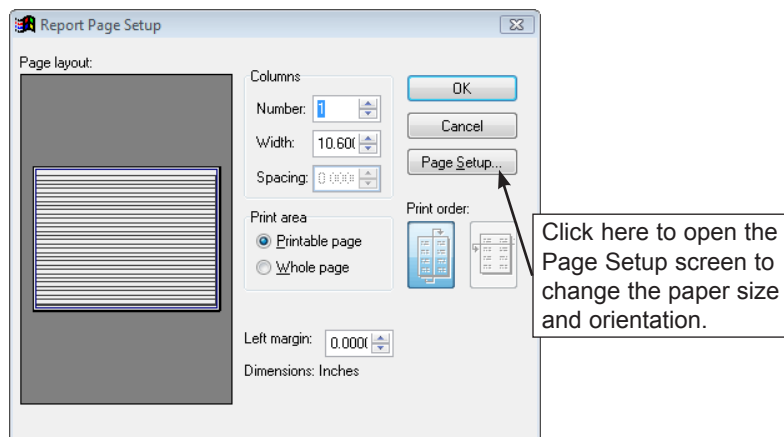


Figure 19-2 Report Designer screen

DROP-DOWN MENUS

File - This drop-down menu contains options to **Save** changes, modify the **Page Setup** and **Close** out of the Report Designer screen. The **Report Page Setup** screen, seen in Figure 19-3, allows you to set up multiple columns, and by clicking the **Page Setup** button, change page orientation and paper size.

Figure 19-3
Report Page
Setup



Save Your Changes - Please remember to save changes as you work by using the **File** drop-down menu **Save** option. And after you have modified the report, go

back to **File**, select **Close** and be sure to click **Yes** when asked, “Do you want to save changes to report?”

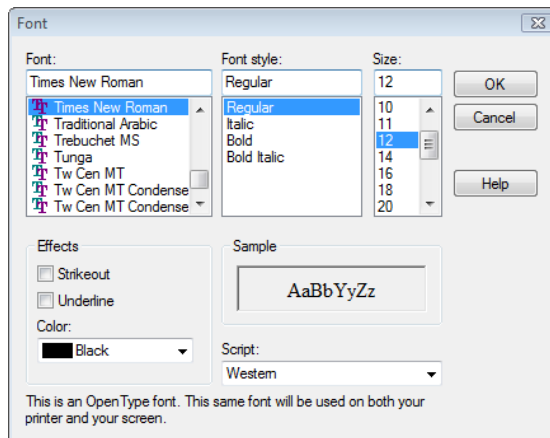
Edit - The Edit menu has choices to **Select All** items in the layout as well as **Cut**, **Copy** and **Paste** selected items. You can also **Undo** the last performed action or **Redo** that action.

View - If you do not see toolbars when you open the Report Designer screen, such as Report Controls or Layout, you can use the View menu to make them available. Report Controls and Layout contain the most commonly used tools that enable you to insert labels, fields, lines, and images and change the layout. This chapter contains detailed information about both toolbars. The View menu also gives you access to the Color Palette Toolbar and Report Designer Toolbar. The Color Palette enables you to change the color for text, lines, shapes, etc. The Report Designer toolbar has shortcuts to other toolbars and report functions like data grouping.

Format - The Format menu contains ways to align, space, and organize multiple items. It also accesses controls for font, color, and the weight and style for lines and shapes. Many of these features are available using the toolbars.

To change the font type, size, style, or color, select the text on the Report Designer screen and then select **Font** from the **Format** drop-down menu. You will see the screen shown in Figure 19-4. All Windows fonts are available. You can choose a style of bold, italic, or underline, a point size, and text color. You can also select the font color from the Color Palette toolbar available in the View menu.

Figure 19-4
Font Change
screen



Report - The Report menu has selections for adding optional bands such as title and summary, grouping data, and choosing a default font for this report. When you select a default font, every time you insert a Label (capital A button) or Field (ab button) from the Report Controls toolbar, it appears in your specified font. Other options in this menu are not commonly used and are outside the scope of this chapter.

REPORT BANDS

The horizontal bars that span the column width of your report separate the report into band types. Each report contains at least three bands. The **Page Header** band is displayed at the top of each page of the report. The **Detail** band makes up the report's body and contains output fields, and the **Page Footer** band is displayed at the bottom of each report page. In many column layout reports, the Page Header contains the column headings, which appear once at the top of each page. The Detail band has the fields that will appear for each record on the report. The Page Footer may include a page number or other data you want to see at the bottom of each page.

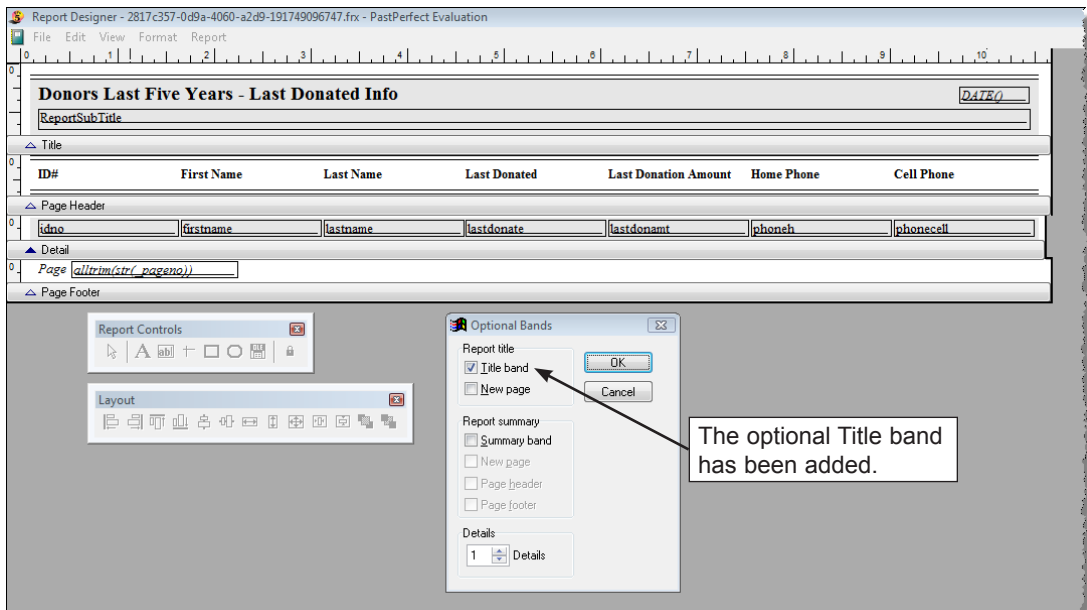


Figure 19-5 Report Designer screen with bands

You can add bands such as Title, Summary, Group Header and Group Footer, as required. The **Title** band contains text that appears before the main report begins. The **Summary** band contains text that appears at the end of the report. The Summary band is usually employed when you want a count or sum at the end of the report. The **Group Header** and **Group Footer** bands display at the top and bottom of each data group on the report. To add these additional bands to a report, select **Optional Bands** (for Title and Summary bands) or **Data Grouping** (for Group Header and Footer bands) from the **Report** drop-down menu at the top of the Report Designer screen. Data Grouping will be explained later in an example.

To adjust the vertical size of the various bands, click on the gray line (showing the band name and an up arrow) at the bottom of the band. Then while holding down your left mouse button, drag the line up or down to expand or shrink the band. You may also double click on the gray line to open a window where you may type in the desired size of the band.

TOOLBARS

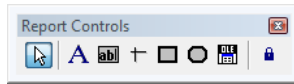
The Report Controls, Report Layout, and Color Palette toolbars will be docked at the top of your Report Designer screen by default. It is easiest if you leave the toolbars docked at the top of the screen. Toolbars may be reshaped and moved. To move a toolbar that is not docked, click on the colored top portion (with the toolbar name) and drag it to the desired location. To dock a toolbar, drag it to the top of the screen so it turns into a horizontal rectangle with a thin border and let go of the mouse. If a toolbar does not appear on the screen, you can select it from the View menu.


You will find you use Report Controls and Layout all of the time, and they are the ones you want to have displayed on your screen. The Report Controls toolbar contains all the functions for adding and changing items including text, fields from your catalog, lines and images. The Layout toolbar enables you to organize those items. These two toolbars are explained in detail below. A Report Designer toolbar is also available, but you will not need to use it as its functions can be accessed from the drop-down menus.


REPORT CONTROLS TOOLBAR


Below are descriptions for each tool.


Figure 19-6
Report Controls
Toolbar





-  **Select Objects/Selection tool** - This is the default tool on the toolbar. It allows you to use the mouse to select items on the report. When you are finished changing selected objects, click this arrow button to deselect them.

-  **Label** - To add or edit text in your report, such as a title, field label or column heading, first click on the Label tool. Next, click where you want to add or edit text. Once you see the flashing cursor, begin typing the text.

-  **Field** - To add a new field to your report, first click the Field tool. Your mouse will turn into a plus sign. Next, click where you want the field to appear and hold your mouse button down. Start drawing a box with your mouse, and when you release the mouse, the **Report Expression** screen will appear. The Report Expression screen is described in detail below. In the Expression line, enter the field name for the field you want to add to the report. When you have entered the field name and chosen the desired settings, please click **OK**. On the report, you will see the field name in a box. This field box pulls data from the database(s) you selected when you chose a Report Type.

-  **Line** - To draw a line in your report, first click the Line tool. Next, position the cursor where you want the end of the line to be, click and hold your mouse button and drag until the line is the desired length, and then release the mouse button. You may draw horizontal and vertical lines.

-  **Rectangle** - To draw a rectangle in your report, click the Rectangle tool. Next, position the cursor where you want a corner of the box to be, click and hold your mouse button, drag until the box is the desired size, and then release the mouse button.

-  **Rounded Rectangle** - To draw a rectangle with rounded corners in your report, first click the Rounded Rectangle tool. Next, position the cursor where you want a corner of the rounded rectangle to be, click and hold your mouse button, and drag until the rounded rectangle is the desired size. To indicate how

rounded your rectangle should be, double click on the Rounded Rectangle object to open the Round Rectangle screen where you can pick the shape of the rounded rectangle, from slightly rounded to completely oval. An oval shape can be resized to become a circle.



Picture/OLE Bound Control - Use this feature to insert an image in the report. Report images must be in BMP, JPG, GIF, PNG or TIF format. If you have your logo or letterhead as an image file, use this tool to put it on the report.



Button Lock - Used to make one of the tools the “default” tool when inserting items into a report. If you plan to use a tool multiple times, you can use Button Lock to save you from clicking the tool every time you need it. Click the Button Lock again or the Selection tool to unlock this function.

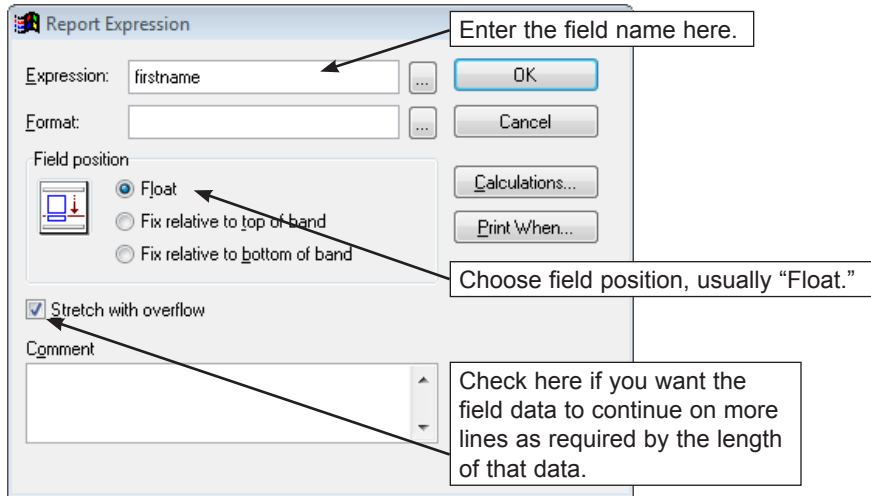
Quick Tips for Item Selection, Resizing and Placement

- Click on an item to select it.
- Click and hold down your mouse so you see a pointing hand, then drag the dotted line box around several items to select them as a set.
- Shift click on multiple items to select them as a set. To do this, please hold down the **Shift** key while using the mouse to click on multiple items.
- When items are selected, you can move them with the mouse or the arrow keys on the keyboard. You may also resize them using your mouse or by holding the **Shift** key down and using your arrow keys.
- When multiple items are selected, you can resize them together by holding down the **Shift** key and pressing the arrow keys.
- Double click on items to open screens that let you change their attributes.
- When you are finished changing selected items, click the Select Objects/Selection tool on the Report Controls toolbar to deselect them.
- To adjust the vertical and horizontal location of an item, click on the item and, using the left mouse button, drag it up or down. You can also click on the item once to select it, then press the keyboard arrow keys to move it.

THE REPORT EXPRESSION SCREEN

When adding a new field to the report, use the **Field** tool, as described above. This will open the **Report Expression** screen, seen in Figure 19-7. This screen can also be used to change an existing item's attributes. To open the Report Expression screen for an existing item, double click on the field.

Figure 19-7
Report
Expression
screen



For most reports, you can add any field that is contained in the database on which the report is based. For a list of available fields, please review the Field Descriptions reports from the Reports menu. The field name that you enter in the report expression is not always identical to the field label on the data entry screen. When viewing the Field Descriptions report, the field name comes after the paragraph, inside square brackets before the colon. For instance, "objname" is the field name in [OBJNAME: c(40)]. To add the Object Name field to the report, type **objname** in the **Expression** line. If a field name is added to a report that is misspelled or not contained in the underlying data file or query, the report will produce errors.

You may enter one or more field names in an **Expression** line. If you want to pull multiple data fields into one field box, you will separate the field names with a comma or semicolon with NO spaces. If you use a comma, the fields will appear with one space between them in the report. When using a semicolon, a carriage return will appear between fields.

Example: If you had a Contacts report where you wanted the first column with the contact ID#, a second column with contacts' first and last names, a third column with the last donation date, a fourth column with the last donation amount, and a

fifth column with both the home and cell phone numbers, you would insert field boxes as in Figure 19-8. You can place the fields first name and last name together, separated by a comma in one box like this: **firstname,lastname**.

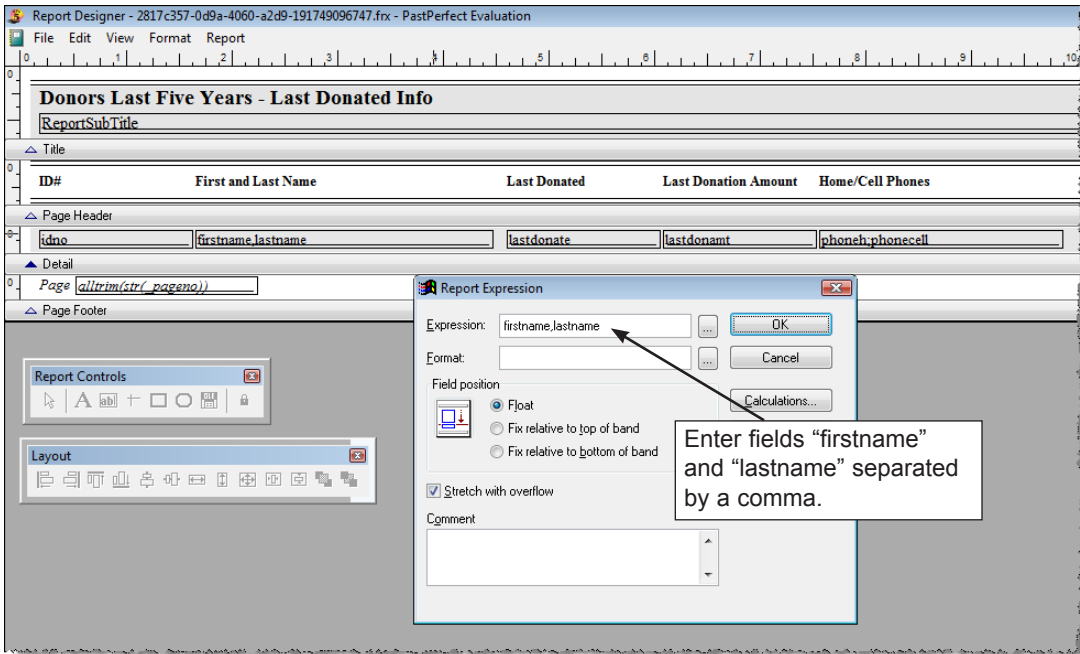


Figure 19-8 Report Expression screen

They will appear in one column as shown in Figure 19-9. You also want the telephone numbers in a single column, but want home phone to appear above the cell number. You can achieve this by entering **phoneh;phonecell** in the Expression.

ID#	First and Last Name	Last Donated	Last Donation Amount	Home/Cell Phones
25	Alfred Washington	08/17/2007	25000.00	000/555-4790 000/555-3212
9	George Kittridge		5000.00	
8	Fiona Blaine		3500.00	000/555-3211
2	Mary Parr		2500.00	000/555-1236 000/555-1112
13	Eric Jenkins		2500.00	000/555-7878
37	Harding Kramer	03/15/2007	2500.00	
26	Barbara Fitzgibbon	01/31/2009	2200.00	
24	Ian Smithson	01/23/2009	1200.00	000/555-1287 000/555-6732

Figure 19-9 Preview of report

Using the **Format** option on the Report Expression screen, you can left, right or center justify data in a field box. For instance, if you include a field like amount paid (which represents a monetary value), you may want to right justify the numbers on the report. You can do that by clicking the **Browse** button (button with three dots) to the right of **Format**, unchecking Left Justify, and selecting Right Justify. Click OK.

In the **Field Position** section of the dialog screen, you can set whether an item is fixed to a point in the report or floating relative to other items. You generally want to use **Float** when you have **Stretch with overflow** selected. If the data in one field may stretch to multiple lines, as is often the case with unlimited memo fields, you will want other fields and text to move up or down, rather than being overwritten. For instance, your object descriptions may be several paragraphs or just a sentence. You would use **Stretch with overflow** to allow one field expression box (descrip) to accommodate different description lengths. You would then also set the description field box and other field boxes and text labels around it to **Float**. This way the position of the items accommodate longer and shorter descriptions.

When you place a field on the report you should adjust its size to the minimum required, not the maximum. Using **Stretch with overflow** enables you to compensate, so that all data appears on the report, even if the field expression box does not seem large enough. Data will flow to additional lines.

TIP

Some reports are set up as labels, such as catalog cards, catalog record labels, and contacts mailing labels. Working in the Label Designer screen is just like using Report Designer; however, your fields, labels, lines, etc. must have a fixed field position due to the limited size of labels. It is also important to note that fields on labels may not be set to Stretch with overflow. They will have a fixed size.

With the **Calculations** tool, you can count the number of records or get a sum of values on reports. Many of the predefined reports show a count of the records or contain total values. However, you can add these to any report by inserting a Summary band, copying a field, and setting the Calculations.

Counting Records on a Report

To count the number of records on a report and place the total at the end of the

report, first go to the **Report** drop-down menu at the top of the Report Designer screen. Choose **Optional Bands** and check **Summary band**, seen in Figure 19-10. Click **OK**.

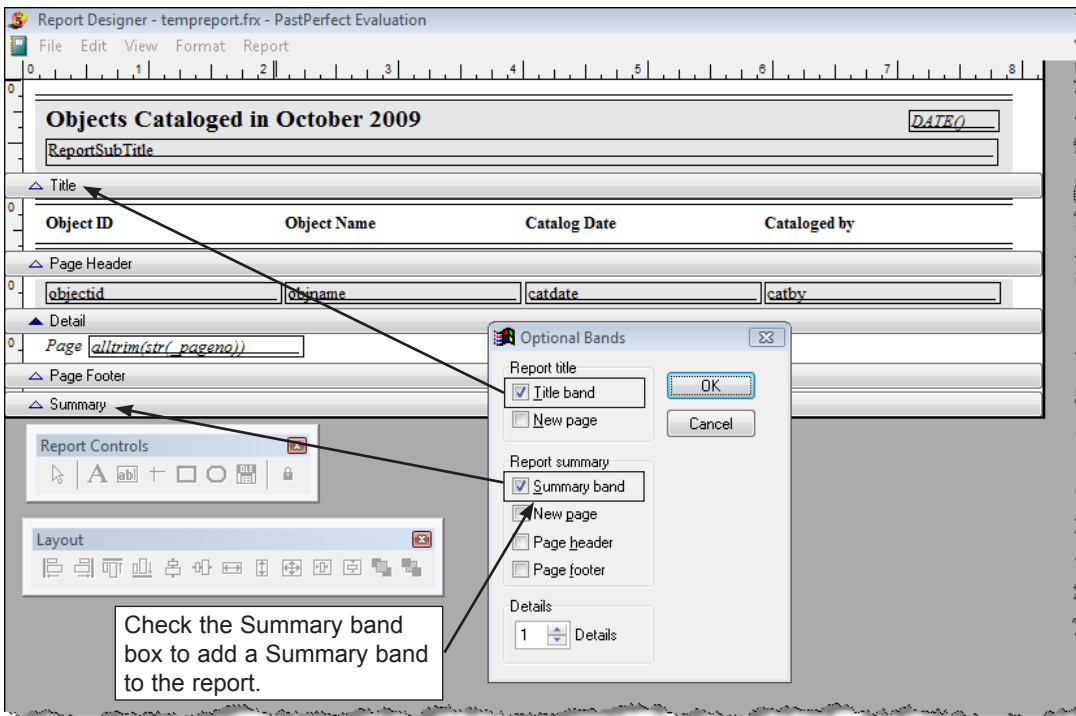


Figure 19-10 Optional Bands screen

Since there is one Object ID field for each record, you can count the number of its instances to get a total number of records. Select the **objectid** field and go to the **Edit** menu. Choose the **Copy** option. Then choose **Paste**. Using your mouse, move the second **objectid** field box down to the Summary band, as in Figure 19-11.

Double click on the **objectid** field to display the Report Expression screen then click **Calculations** as seen in Figure 19-12. Select **Count** and click **OK** twice to exit the Report Expression screen.

The total number of records will appear in this field box on the last page of the report. You may want to use the Format drop-down menu and choose Font to make this box bold. You can also use the Label tool to add text to explain this number.

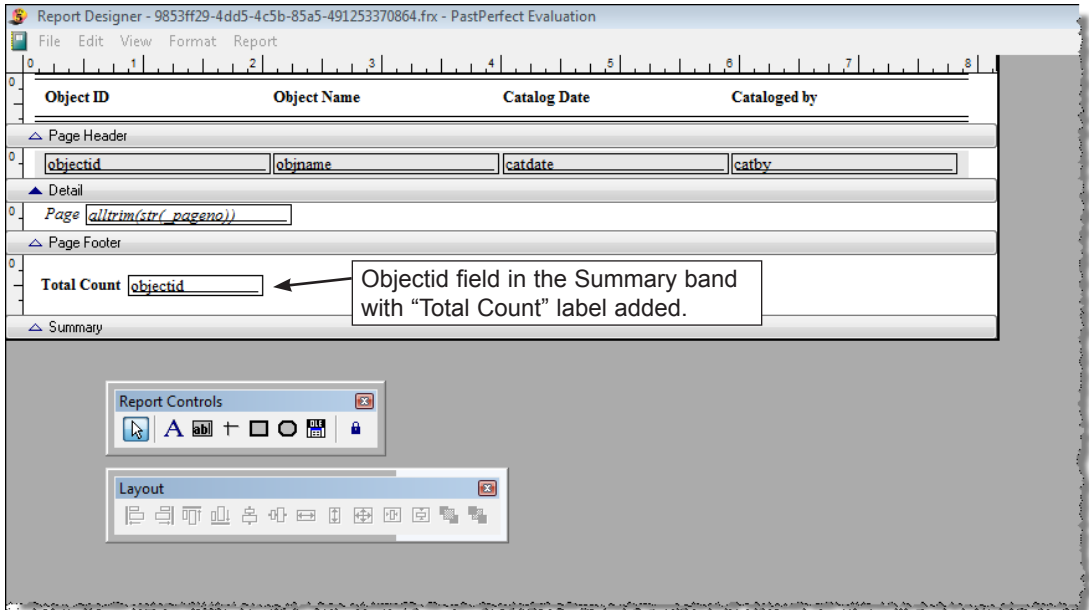
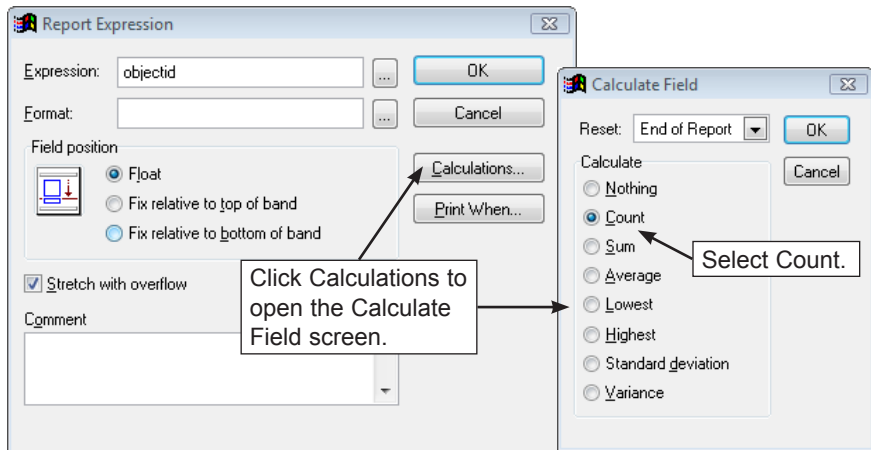


Figure 19-11 Report with objectid in Summary band

Figure 19-12
Calculations
screen

Summing Values on a Report

When choosing a field to sum, please keep in mind it needs to be a numeric field to perform the calculation. Generally numeric fields, such as objects' acquired values or insured values or contacts' donations, dues, or in-kind gift amounts, are the fields that you want to sum. To get a total value on a report, start the same way as

counting records, by creating a **Summary band**. Then, similar to counting records, select the field you want to sum, and copy the value or amount field and paste the copy into the Summary band. This is where the total value will appear at the end of your report. Double click on the field box and click **Calculations**. Choose **Sum**, as seen in Figure 19-13, and click **OK** twice.

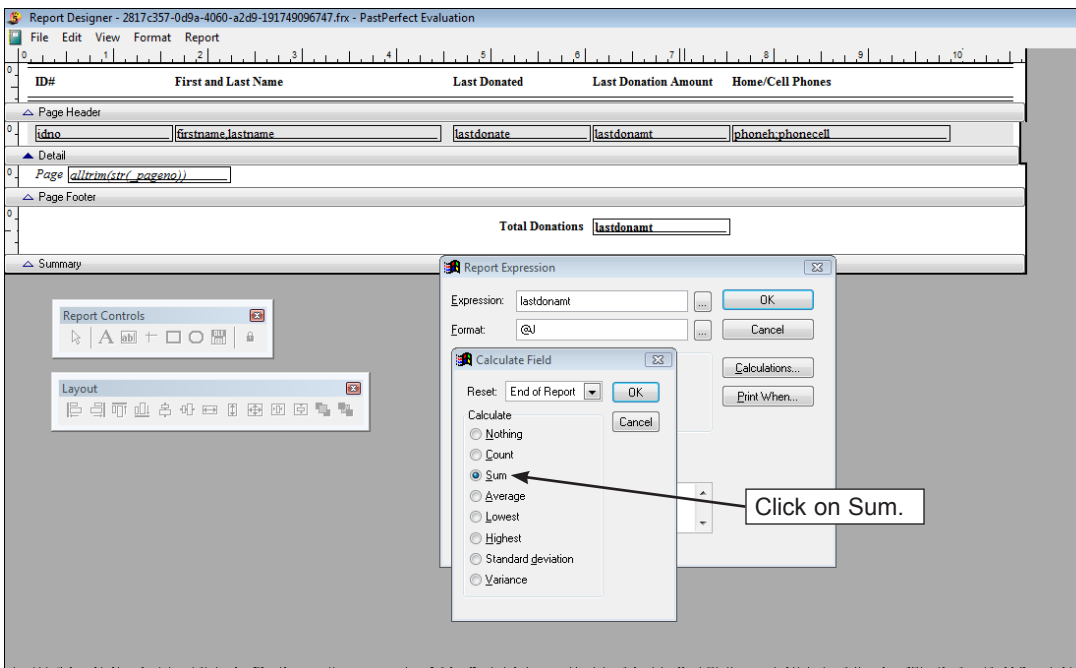


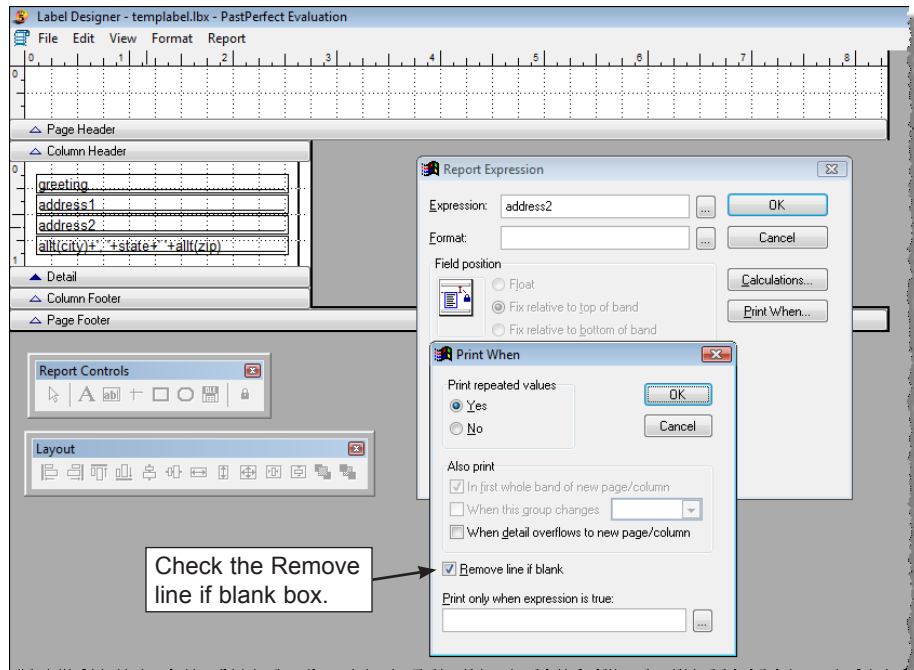
Figure 19-13 Calculate Field screen, Sum selected

Print When Statements

The **Print When** function allows you to remove a line if no data exists in that field or print data only if a condition is met. One of the most common uses is in address labels. Some contacts may have two address lines, so you want to add both the Address1 and Address2 fields. However, you do not want an empty line if no data exists in the Address2 field. To eliminate the empty line, double click on the **address2** field box. Click **Print When**, then check **Remove line if blank**, as in Figure 19-14.

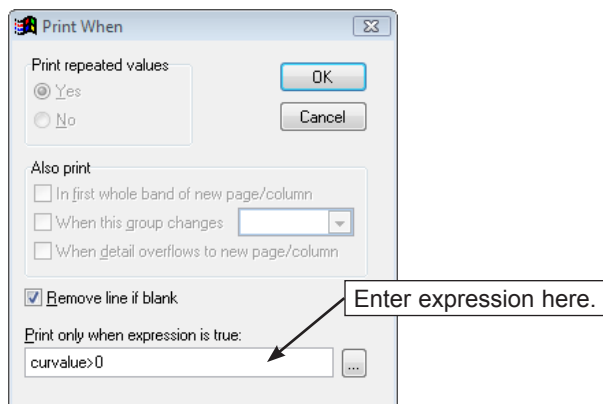
Click **OK**, then **OK** again to exit the Report Expression screen. Now when printing a list of contacts labels, the city, state and zip code line slides up beneath Address 1, when no data exists in the Address 2 field.

Figure 19-14
Print When
screen



Print When may also be useful if you use numeric fields and want the data to print only if the amount is greater than zero. Double click on the field containing the data you want to restrict, then click on **Print When**. In the **Print only when expression is true** box, enter the field name, the greater than sign and zero. For example, if you wanted to print only the current minimum values for items with values greater than zero, you would enter the following, seen in Figure 19-15.

Figure 19-15
Print When
screen with
expression



Then click **OK** twice to get back to the Report Designer screen.

THE LAYOUT TOOLBAR

The Layout toolbar can be quite helpful to ensure that items on the report are properly aligned or centered. For example, to be sure that the left edge of multiple items are aligned, select the items with the Selection tool and click the **Align Left Sides** button.

Figure 19-16
Layout Toolbar



The Layout toolbar has 12 other tools, including Align Right Sides, Align Top Edges, Align Bottom Edges, Align Vertical Centers, Align Horizontal Centers, Stretch to Same Width, Same Height, Same Size, Center Vertically, Center Horizontally, Move to Front, and Move to Back.

EXAMPLES

Now that you know the basics, here are a few examples of report modifications. The important part of these instructions is the process, which you may apply to any report.

For the first example, let's say you want to modify the Objects Summary report to include more information. The default report includes these fields: Catalog (O, P, A, L), Object ID, Object Name, Description, Condition, Status, and Home Location. If you want to remove the fields Condition and Status and add the fields Other Name and Collection to the report, follow these steps.

MODIFYING FIELDS AND TEXT

1. From the Reports menu, select **Objects** from **Report Types** and click once on the report **Objects Summary**.
2. From the Report Layout Options section, choose Custom Layout 1 or Custom Layout 2 and click on the **Modify Selected Layout** button. This will open the Report Designer screen.

- Now let's change the Condition field to Collection. To do this, double click on the field "Condition" which is in a box above the gray band labeled Detail. In the Report Expression screen, change the Expression from **Condition** to **Collection** and click **OK**.

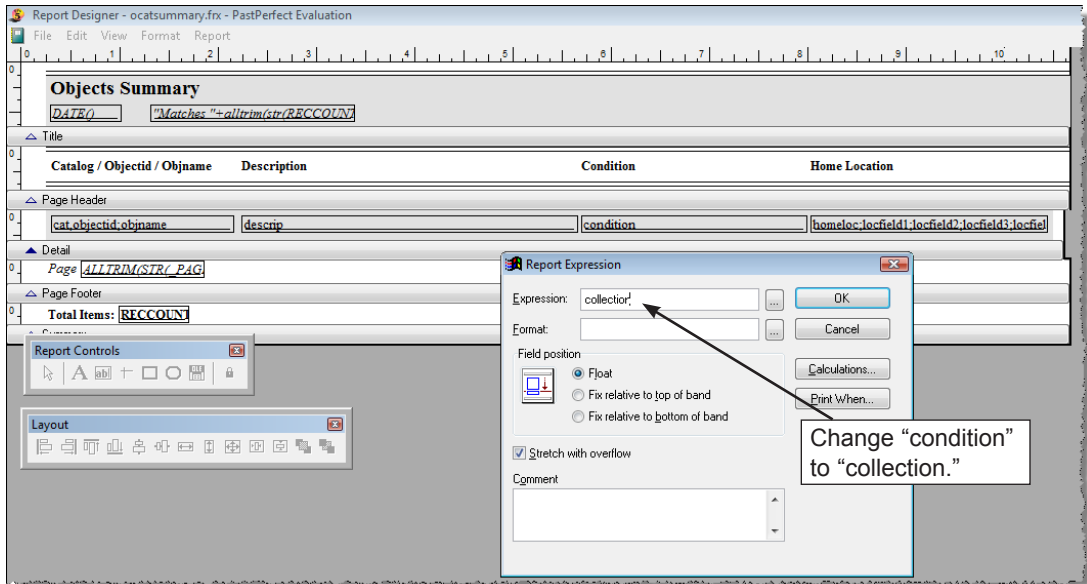


Figure 19-17 Change Expression

- Next, you need to change the label for the field as it appears in the Page Header band. To make that change, select the **Label** tool from the Report Controls toolbar, click on the word "Condition," use backspace and/or delete on your keyboard, then type the text "Collection." Then click the Select Objects tool to complete the change.
- Now, to make more room for the Collection field, let's remove the Status field. First click on the word "Status" in the Page Header band and press the **Delete** key on your keyboard. Then click on the field **status** in the box below in the Detail band and press the **Delete** key again.
- With the extra space available to the right, you can expand the width of the Collection field to accommodate longer entries. To do this, first click on the Collection field box in the Detail band. When it is selected, you will notice that the box has eight small dots, one each on the four corners and in the center of each side, as in Figure 19-18.

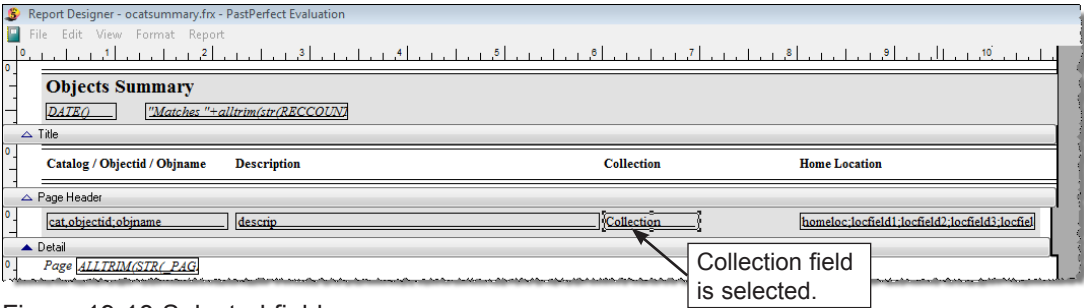


Figure 19-18 Selected field

To increase the width of the field, point the mouse to the center dot on the vertical right edge of the field. You will see your mouse cursor change to a vertical line with arrows pointing to the left and right. Press and hold the left mouse button while you drag to the right. When it reaches the desired width, release the mouse button, seen in Figure 19-19.

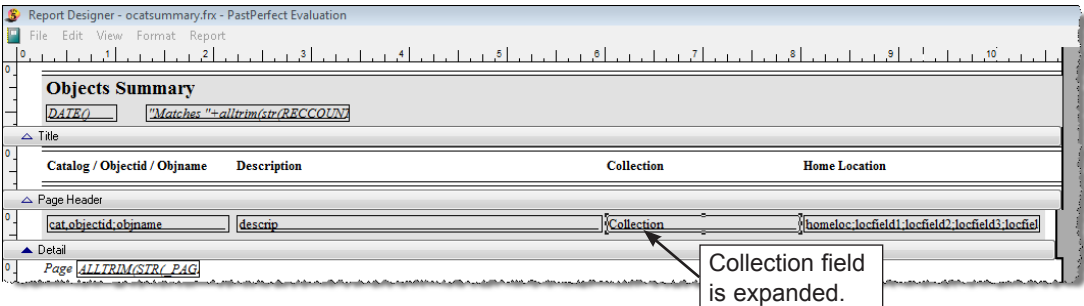
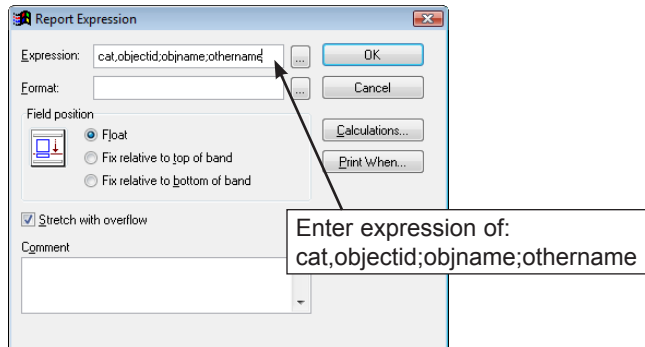


Figure 19-19 Field expanded

7. The last step is to add the Other Name field. We want to have the Other Name print in the left column of the report, below the Object Name. To do this, double click on the field **cat,objectid;objname** in the Detail band. In the

Figure 19-20
Expression
field



Expression field, after “objname,” add a semi-colon and the word **othername**. See Figure 19-20.

When you print the report, you will see the catalog, a space, the Object ID, a carriage return, the Object Name field, a carriage return, and the Other Name field.

8. Since there is not much space in the Page Header to add the words “Other Name,” select the **Label** tool, click on the text “Catalog/Objectid/Objname” just after the “e” and add an “s.” This will change the field label to “Catalog/Objectid/Objnames.”
9. Finally, save your changes by selecting **Close** from the **File** menu and answering **Yes** when asked, “Do you want to save changes to report?”

Now you can run the modified report from the Reports menu. Be sure that the report is set to the Custom Layout you selected, under Report Layout Options. You can narrow the records to include by selected fields, sort the results, and preview or print the report. Figure 19-21 is a preview of the modified Objects Summary report.

Catalog / Objectid / Objnames	Description	Collection	Home Location
O 1997.3.1 Necklace Beads	Beads recovered from grave site. Unglazed clay beads of various shapes -- 6 leaf-shaped, 2 flower-shaped, 1 bird, 25 tubular beads (34) total. These items were strung on dental floss by Harlan Grover, the man who found them in his corn field. *Because the Native American Graves Protection and Repatriation Act (NAGPRA) is designed to protect sensitive cultural material, the example used here is entirely fictitious. The artifact depicted and described is a new tourist item purchased in Mexico in 1986.	Repatriation	Museum Main Bldg
O 1997.6.2 Granite	Pink granite is the commonest of all intrusive igneous rocks. It has a total silica content greater than 65%, and a minimum quartz content of 20%. Granite is coarse-grained with crystals larger than 5 mm in diameter. It forms at considerable depth in the earth's crust.	Rocks and Minerals Collection	Museum Main Bldg
O 1997.6.3 Pyrite Fool's Gold	Pyrite forms as cubic or octahedral crystals. The pale yellow color and metallic luster give rise to its common name, "fool's gold".	Rocks and Minerals Collection	Museum Main Bldg
O 1997.6.5 Quartz Rock Crystal	Quartz crystal also called rock crystal in its colorless form. Quartz is one of the commonest minerals of the earth's crust. It crystallizes directly from igneous magma. Quartz crystals are usually hexagonal and prismatic, terminated by two (positive and negative) rhombohedra resembling hexagonal pyramids. Quartz crystals may occur either in well-formed crystals or in compact and concretionary masses.	Rocks and Minerals Collection	Museum Main Bldg

Figure 19-21 Modified Objects Summary report

ADDING IMAGES ATTACHED TO CATALOG RECORDS

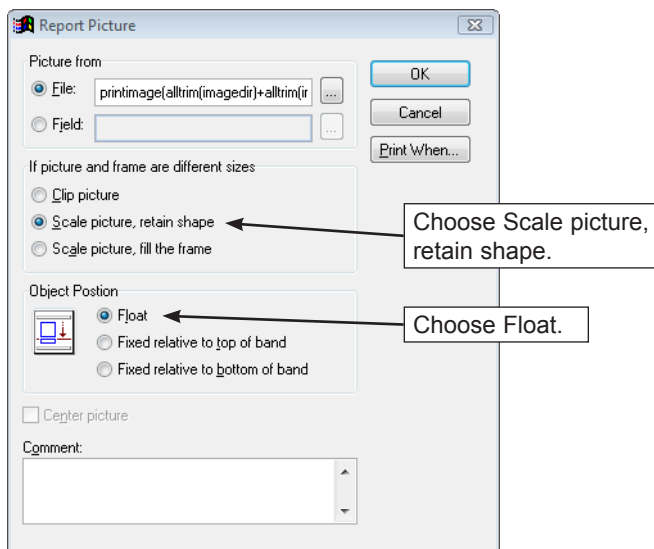
With PastPerfect it is also possible to include images on a report. In this example, we will add the image of each item to the Collection List with Descriptions report.

1. First, open the design screen by selecting Reports | All 4 Catalogs, and Collection List with Descriptions. Select a Custom Layout, then click Modify Selected Layout.
2. Let's place the image on the left of the report just below the **alltrim(descrip)** field box. You will need to increase the height of the Detail band to accommodate the image. Click on the gray Detail band and drag it down to make the space. Then select the **Picture/OLE** tool on the Report Controls toolbar and move your cursor to the blank area where you want to place the image. You will notice your cursor is a plus sign. Click and hold your mouse button down and draw a box.
3. As soon as you release your mouse, the **Report Picture** screen will open, which allows you to specify the filename of the digital image. Since we want to add images that have been attached to PastPerfect records, we will use a specific expression. In this case the entry would be as follows:

printimage(alltrim(imagedir)+alltrim(imagefile))

Be sure to select **Scale picture, retain shape** as shown below.

Figure 19-22
Report Picture
screen



4. You will also need to use the Print When function, in case there are records without images on the report. Click the **Print When** button, then in the **Print only when expression is true** line, enter the following expression.

!empty(imagefile) and file(alltrim(imagedir)+alltrim(imagefile))

5. Click on **OK** to return to the Report Picture screen. Please be sure the image is set to the Object Position **Float**. Click **OK** to return to the design screen. You should now see a gray box with an "X" on the screen where the image will be placed, as in Figure 19-23. You may need to adjust its size by clicking on the selection dots on the edges of the image and dragging one of the corners.

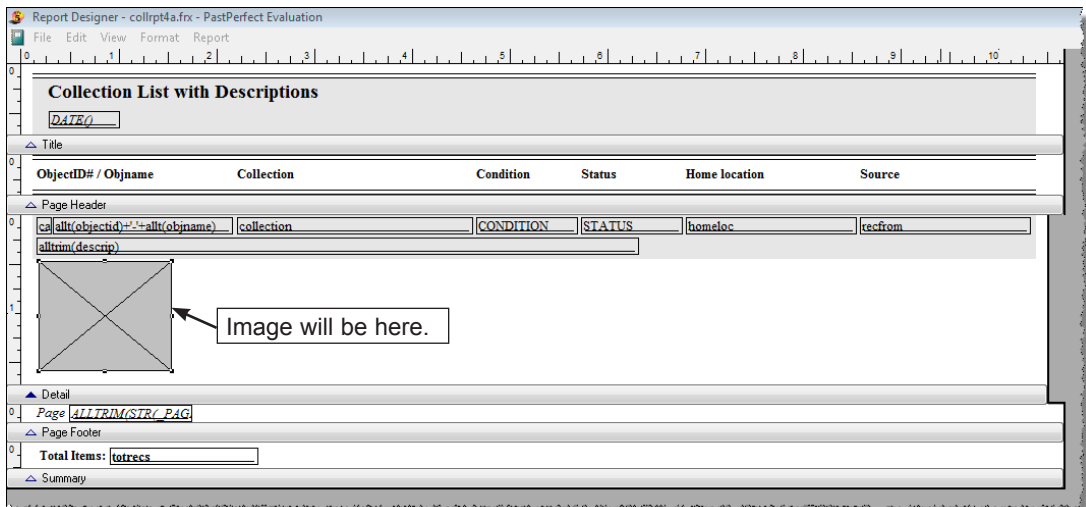


Figure 19-23 Report layout with image

6. This report has alternating gray and white backgrounds for records. You will need to expand the gray rectangle that exists behind the field boxes so that it encompasses the image box you added. Click on the gray rectangle just beneath the field boxes to select it. Then left click on the selection dot in the center of the bottom edge. When your mouse is in the right place, you will see arrows pointing up and down. Hold your left mouse button down and slide the bottom of the gray rectangle down.
7. Using your mouse, drag the Detail band up so it is just underneath the gray background rectangle. The report should look like Figure 19-24.

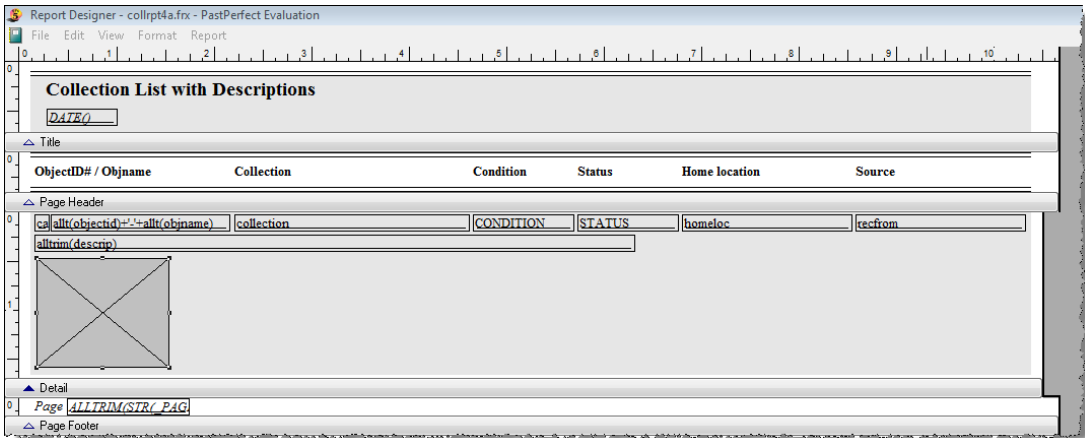


Figure 19-24 Finished modified Collection List with Descriptions report layout

- From the **File** menu, choose the **Close** option and answer **Yes** when asked, “Do you want to save changes to report?” Be sure that the report is set to the Custom Layout you selected under Report Layout Options (Step 1).

Figure 19-25 is a preview of the report with the catalog image added.

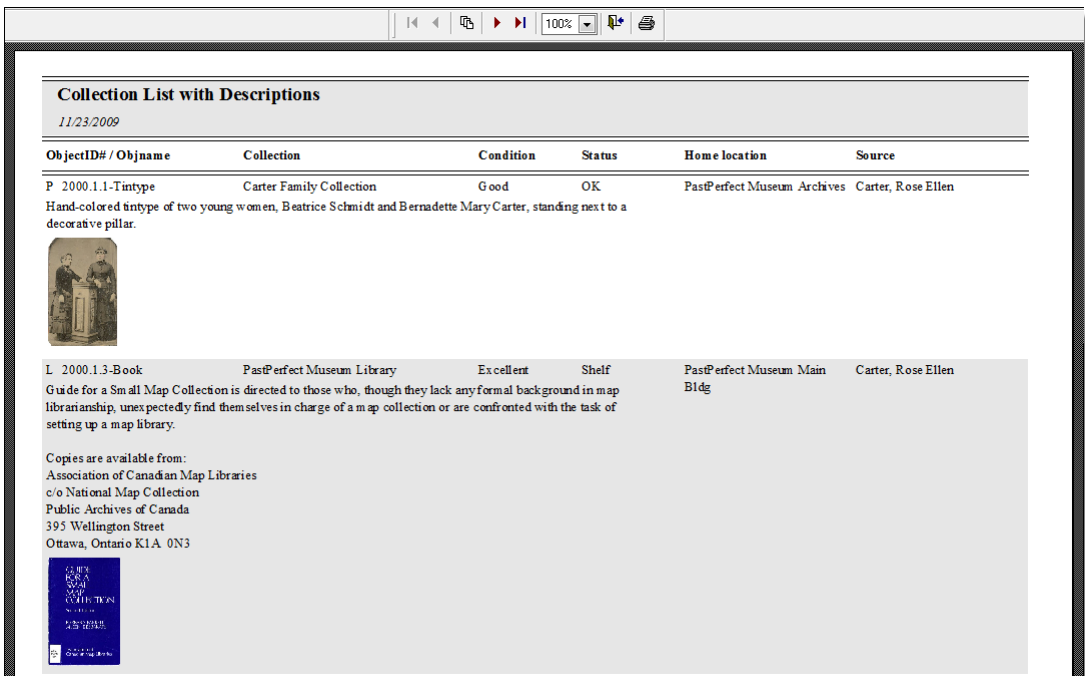


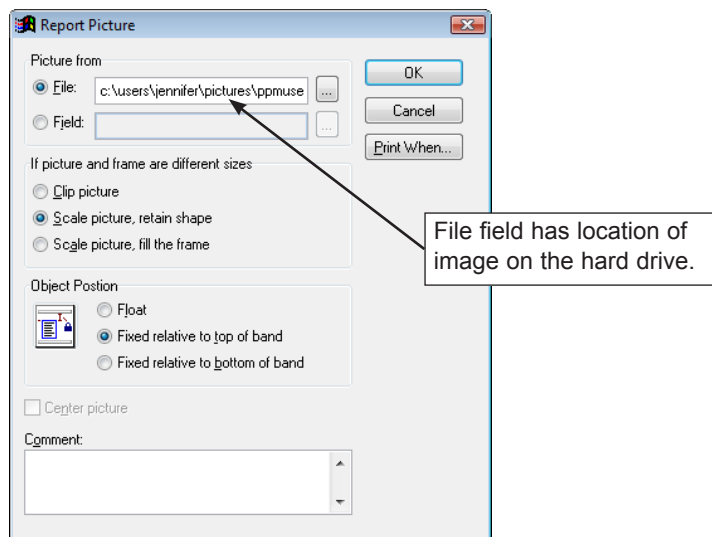
Figure 19-25 Preview of modified Collection List with Descriptions report

ADDING A LOGO IMAGE

You may want to add your organization's logo to the Title or Page Header band of reports. Here are the steps for adding a logo image located on your hard drive to the Deed of Gift report.

1. From the Reports menu, select **Accession** from **Report Types** and click once on the report **Deed of Gift**.
2. From the Report Layout Options section, choose Custom Layout 1 or Custom Layout 2 and click on the **Modify Selected Layout** button. This will open the Report Designer screen.
3. Enlarge the Report Designer screen to full size by clicking on the Windows Maximize button in the upper right corner. This is the center button between Minimize and the X for Close.
4. Left click on the **Picture/OLE Bound Control** tool in the Report Controls toolbar and move your mouse to where you want the logo. Your cursor will be a plus sign. Holding your left mouse button down, drag your mouse to start drawing a box. As soon as you release your mouse, you will see a new window, the **Report Picture** screen.
5. Use the **Browse** button (button with three dots) to the right of the **File** field to get to the **Open** screen where you can navigate to the logo image on your hard drive. Locate the image, then select it and click **OK**.

Figure 19-26
Report Picture
screen



6. Choose **Scale picture, retain shape** at the Report Picture screen (Figure 19-26) to keep your desired image size and retain the image's proper proportions.
7. Click **OK** to exit the Report Picture screen. You should see your logo image. You may enlarge or shrink the image using one of the selection dots at the corners.
8. From the **File** menu, choose the **Close** option and answer **Yes** when asked, "Do you want to save changes to report?" Be sure that the report is set to the Custom Layout you selected under Report Layout Options. Figure 19-27 is a preview of the report with the logo image added.

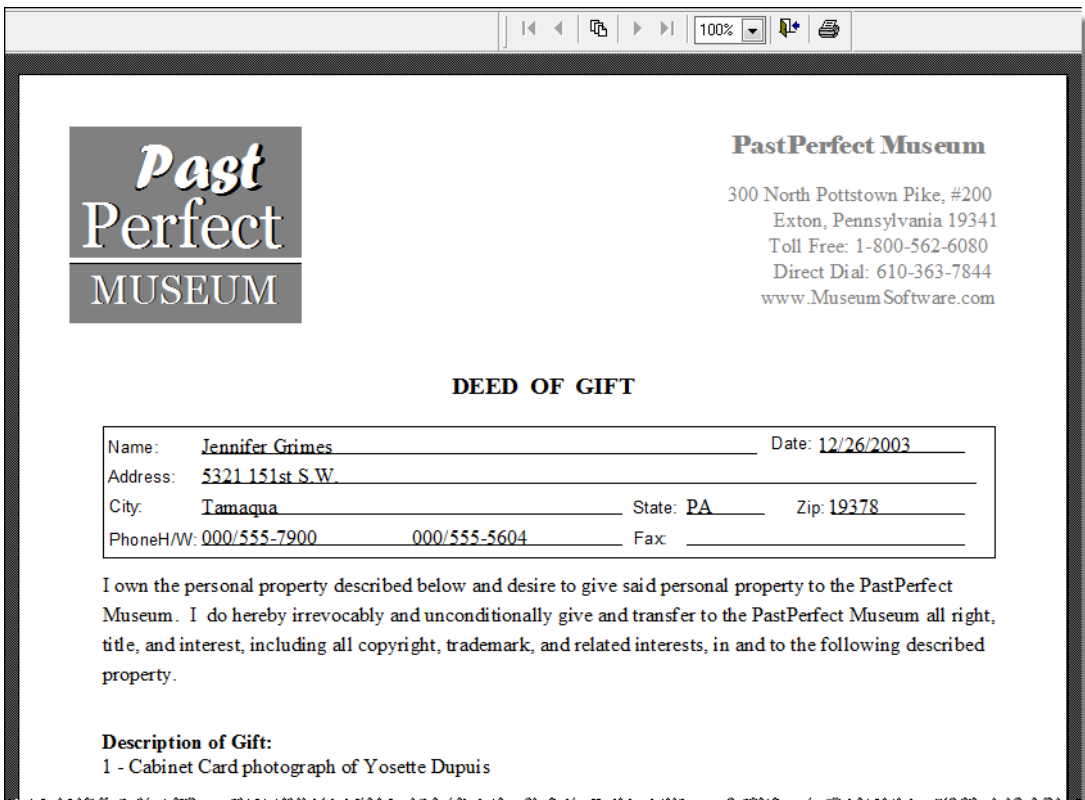


Figure 19-27 Preview of report with logo image

DATA GROUPING

By grouping records on your report, you can view certain objects or contacts together as a subgroup and perform calculations on the subgroups' fields. Let's say that you want to find the total number of photographs kept in each storage

box to estimate the number of acid free photograph boxes you need to order as you process the collection in the coming year. To do this, we will first create a simple Photos Report Maker report, then modify its layout to group by the field Home/Container, which is the sixth location field. For detailed information on creating Report Maker reports, please see *Chapter 18 - Report Maker*.

1. Choose **Report Maker** from the Main Menu.
2. Choose the **Photos** Report Type and click **Create New Report**.
3. Enter a Report Name, such as **Photos Box Count**, complete the other fields as needed and click **Next**.
4. In the Build Filter Statement screen, select the field **Object ID** from the drop-down menu.
5. From the Condition drop-down menu, select **Is not empty**, click **Add to Statement**, then click **Next**.
6. At the Fields to Include screen, double click on the **Object ID** field from the list on the left. It will be added to the **Fields to Include on Report**. Also select the **Home/Container** field. Click **Next**.
7. At the Select Sort Order Fields screen, choose to sort by the **Home/Container** field. Double click to move the field to the **Fields to Sort by** column. Click **Next**, then click **OK**.
8. **Exit** from the Report Output Options screen. When asked if you want to save this report, click **Yes**. Then **Close** out of Report Maker Reports.
9. From the Main Menu, choose **Reports**, then the **Photos** Report Type.
10. Click once on your Report Maker report ***Photos Box Count**. Select Custom Layout 1 or Custom Layout 2 and click **Modify Selected Layout**.
11. Maximize the Report Designer screen, then click the **Report** drop-down menu and choose **Data Grouping**.
12. In the first box (with opposing arrows to its left), seen in Figure 19-28, type the following and click **OK**:

locfield6

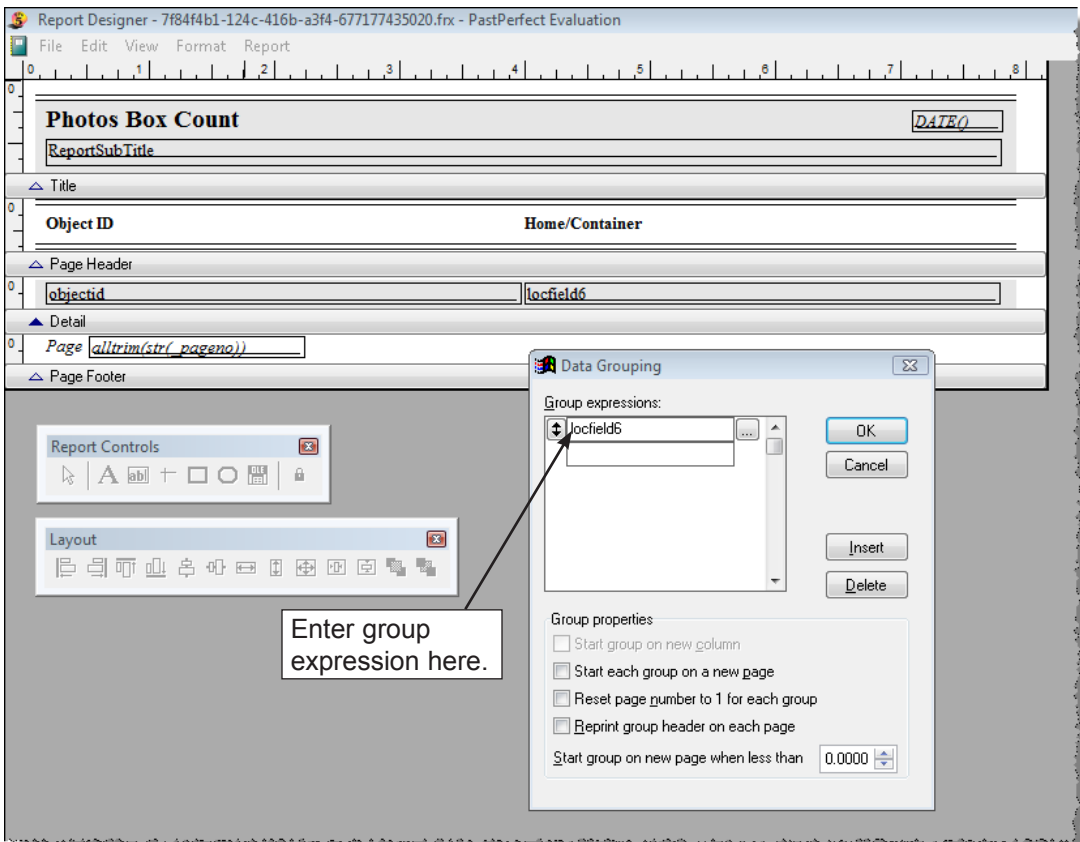


Figure 19-28 Data Grouping screen

13. You will see two new bands – **Group Header 1: locfield6** and **Group Footer 1: locfield6**. Pull the Group Header band down to accommodate a field box.
14. Using your mouse, move the **locfield6** field box into the Group Header band, along the left side. You may want to delete the **Object ID** label in the Page Header band. You can do this by selecting it with your mouse and using the **Delete** key on the keyboard. Then move the **Home/Container** label to the left, above the **locfield6** field.
15. Pull the Group Footer band down to accommodate a field. Using your mouse, move the **objectid** field box from the Detail band to the Group Footer band, along the left side, as in Figure 19-29.

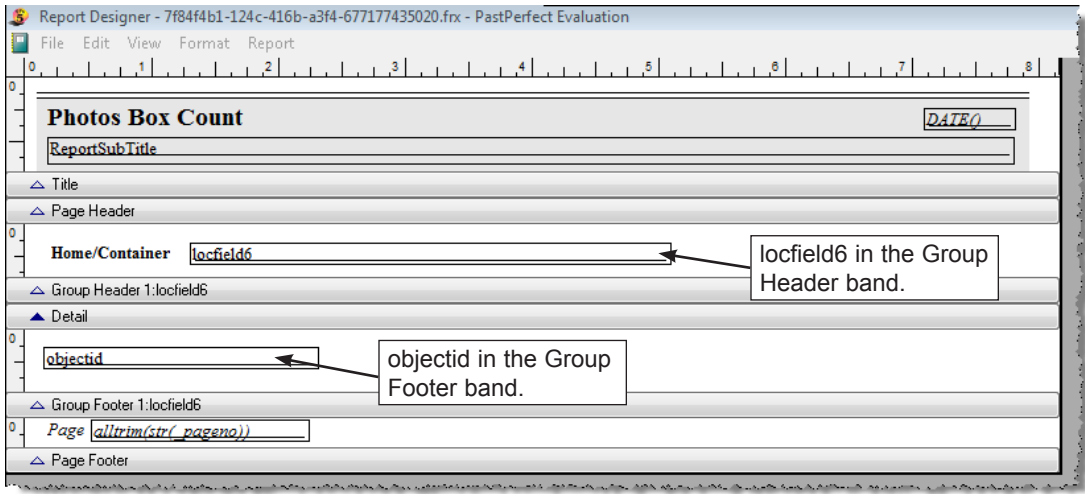


Figure 19-29 Report Designer screen

16. Double click on the **objectid** field box and click **Calculations**. Choose **Count** and click **OK** twice to get back to the Report Designer screen.
17. Delete the gray rectangle in the Detail band and pull that band up against the Group Header.
18. Click the **File** menu and choose **Close**. Be sure to save your changes. When you run and preview or print the report you will see a report with the box names and the number of items in each box. See the preview in Figure 19-30.

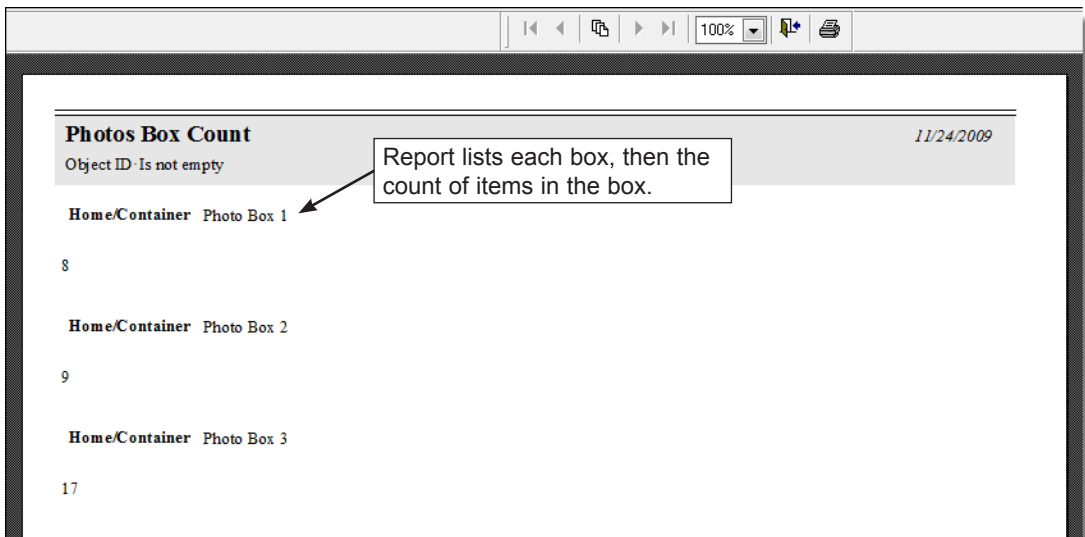


Figure 19-30 Preview of Photos Box Count report

TIP

If you modify a predefined report to include Data Grouping, when running the report, you must choose the field for your Sort Order that you used to group your data. Otherwise the data will not be grouped properly.

CREATING A NEW LABEL LAYOUT

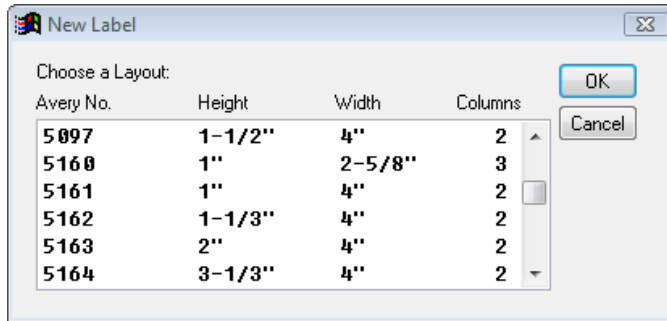
The PastPerfect Reports screen can be used to print and design labels. Some examples of labels are mailing labels, catalog cards, spine labels, and barcode labels. Modifying labels is similar to modifying reports, with a few exceptions.

When you select a label from the Reports menu and choose a Custom Layout, an extra button is available in Report Layout Options. This button is named **Create New Label Layout** and will allow you to select a label design from a list of standard Avery labels. By clicking this button, you erase any customization you previously added, and create a new blank label.

Here is an example of how to design a Contacts mailing label using a new label style. By default, Contacts Label Style #1 and Style #2 both use Avery labels #5160, which measure 1" x 2 ⁵/₈" and print in three columns on the sheet. We will modify Label Style #2 to print on Avery labels #5163, which are 2" x 4" and print in two columns.

1. First, select **Contacts** and **Contacts Labels Style #2** from the Reports menu. Then click on Custom Layout 1 or Custom Layout 2.
2. So that you will not have to re-create the fields on the new label, you can open the old design, select the fields and use the cut and paste tools to transfer the fields. To do this, click on **Modify Selected Layout** to display the Label Designer screen. Click on Edit | Select All, then Edit | Copy. This will put the fields in the Windows Clipboard. Click on File | Close to return to the previous screen. It is not necessary to save the changes.
3. Now, click the **Create New Label Layout** button. When asked if you want to erase the custom label and start a new one, click **Yes**. You will be presented with a list of label styles and their associated Avery numbers, seen in Figure 19-31. Select Avery #5163 and click **OK**.

Figure 19-31
New Label
selection
screen



- The new blank label design screen will open. Make sure that the gray Detail band is set to 2" and the label width is 4". Click on Edit | Paste to transfer the fields from the Windows Clipboard to the label. You will probably need to rearrange the fields to fit this larger label.

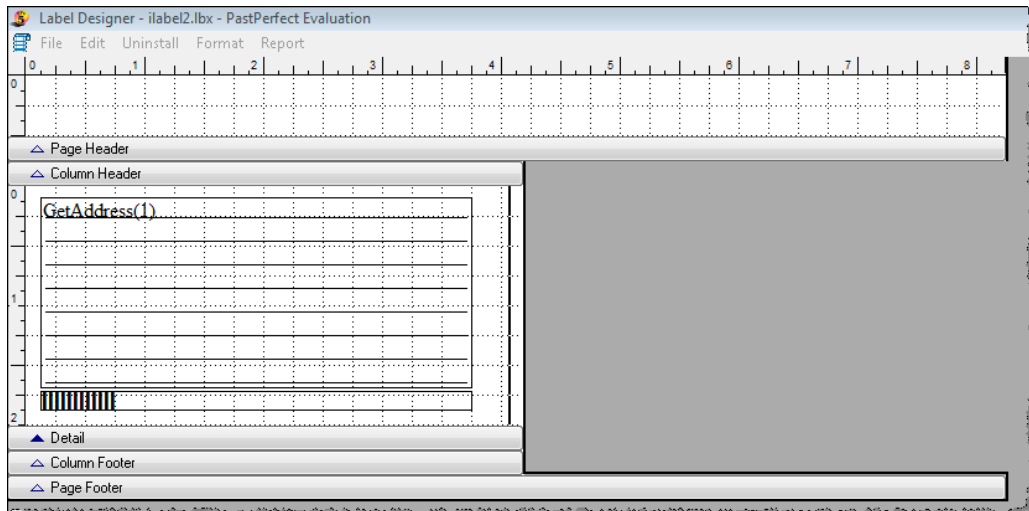


Figure 19-32 New Label screen

- Finally, select File | Close and save your changes. Now when you use the custom layout selected for Contacts Label Style #2 you will get the new layout.

