

## **How do I Create a Report Maker Report?**

### **PastPerfect 4.0**

In PastPerfect, the Report Maker tool is incredibly handy in generating specific reports from your data.

1. Click Reports on the Main Menu of PastPerfect.
2. Select the Report Maker button (icon of quill and parchment)
3. Select the database from which you want to create a report by clicking on it and clicking Next.
4. Once chosen, click the "Add" button to add a new report.
5. Type in a title of your choice and press "OK". Make sure the title is specific enough that you will know what the report is, for future reference.
6. Next, choose a field for your filter statement. This filter decides which records should appear on the report. For example, if you wanted all the records with a description, you would use "Description is not empty" as the filter statement. For this step, you would choose "description" from the list, then click Next.
7. Then you would select "is not empty" as your operator. Because "is not empty" was chosen as the operator, you will not need to perform "STEP 3: Enter a Value".
8. Please choose "Done" and then indicate "Yes" when asked if you want to run the report.
9. On the next screen, choose what fields of information you want to see on the report, such as objectid, collection, etc. You will select a field by double clicking on it to transfer it to the right side of the screen. You may place them in order by using the associated grey squares to move them up or down.
10. When finished selecting and ordering your fields, click "Done".
11. You should now see the "Report Overview" screen, which shows you the selected fields, the filter statement, a sort order, and what type of report it will be (form or column).
12. You can set your sort order by clicking the "Edit Sort Order" button. Then double-click on the field(s) by which you would like your report sorted.
13. Click on "Run Report" and then "preview." This should give you the information you want, however it might need to be formatted.
14. If some of your fields do not appear on the report because there is not enough room, please close out of the preview and the "Setup for Column Layout" screen. Then click "Pick Output Type" at the top of the screen, select "Report in Form Layout", and then choose Done. Run the report again and Preview.
15. If you need to reformat the report, close out of the preview and click on the "edit form" button. This will allow you to further adjust the fonts, sizes, and spacing.

If you have any questions, please contact our Support Office at (800)562-6080. Thank you for using PastPerfect!