

## REPORT MAKER

In addition to the standard reports, PastPerfect provides a powerful custom report generator for you to create your own reports from scratch. To start the Report Maker, click the **Report Maker** button in the Reports section of the Main Menu.

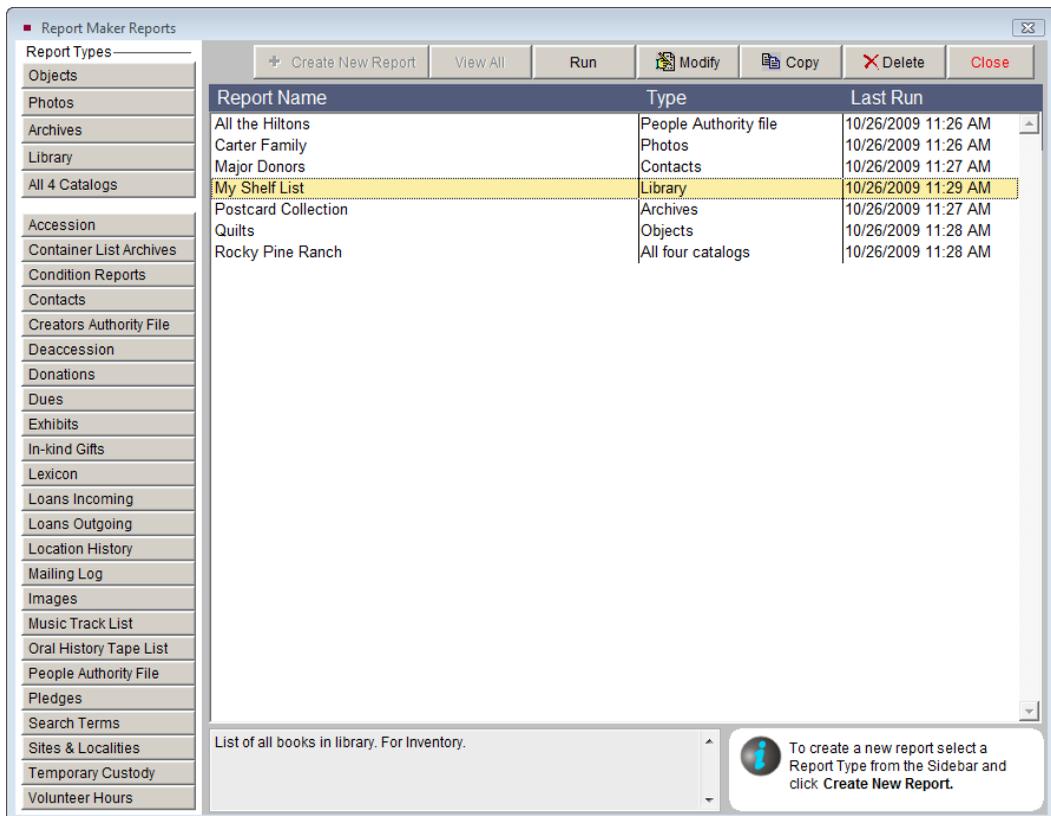


Figure 18-1 Report Maker screen

## THE REPORT MAKER SCREEN

The first screen, seen in Figure 18-1, will display the list of all reports created so far with Report Maker, including the **Report Name**, the **Report Type**, and the date the report was **Last Run**. In the Sidebar on the left are the **Report Types**, which are the 29 PastPerfect database files from which you may create reports. Clicking on one of the Report Type buttons will display the reports of that particular type in the middle of the screen. Figure 18-2 shows just the Objects reports.

You may create new reports based on any data in any of these Report Types. You may also modify or run an existing report from this screen, using the buttons at the top of the screen.

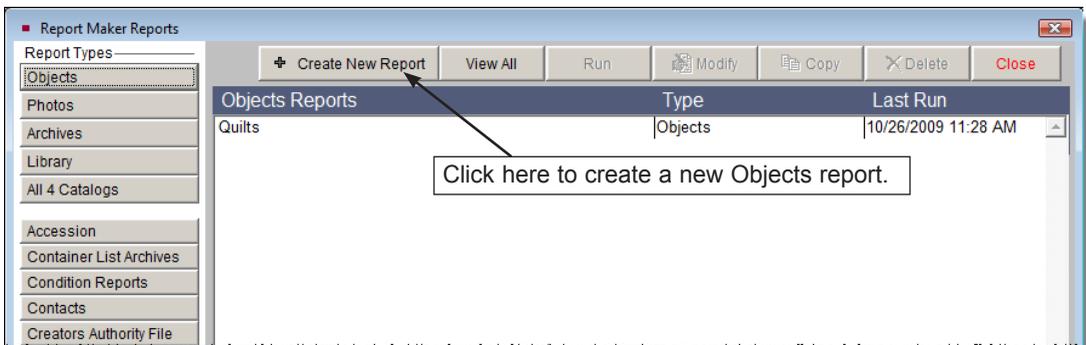


Figure 18-2 Report Maker Objects Reports

The Report Maker screen has the following buttons at the top of the screen:

**Create New Report** - Creates a new report in the selected Report Type. This command takes you to the **Create New Report** screen, which guides you through a step-by-step process of creating a new report. You must choose a Report Type for this button to be active.

**View All** - Displays reports created in all the different Report Types. You cannot create a new report in this mode.

**Run** - After selecting an existing report, this button becomes active. Click this button to run the report and choose to preview, print or export the results.

**Modify** - Allows you to change an existing report's name and description, filter statement, fields included on the report, sort order, and output options.

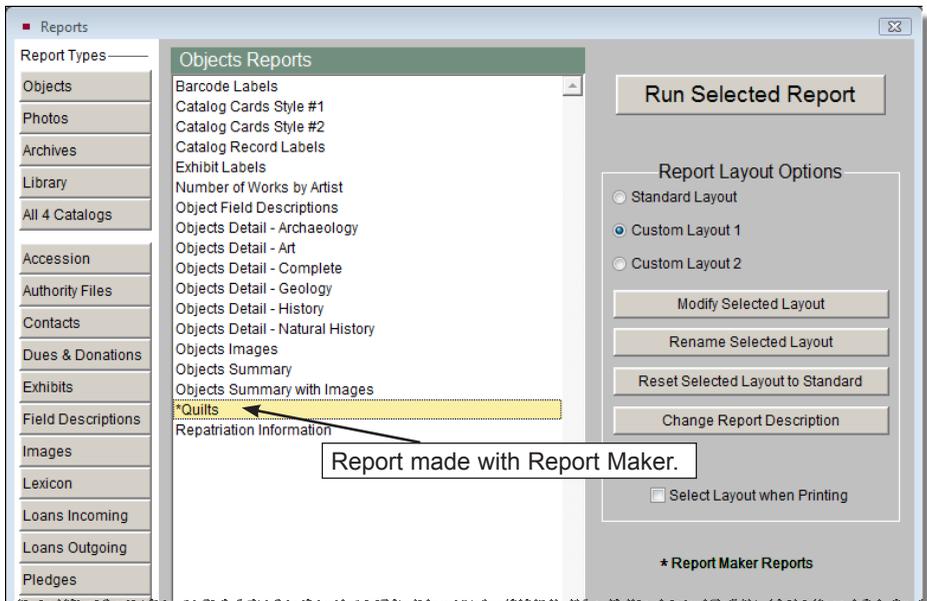
**Copy** - Makes a copy of the selected report. You may enter a new title for the report, then change the report's filter, output fields, sort order, or output options if desired.

**Delete** - Permanently removes the selected report.

**Close** - Returns you to the Main Menu.

Once a report is created, it will also be listed on the main Reports menu when you select the **Reports** button on the Main Menu. Report Maker reports appear with an asterisk before the report name.

Figure 18-3  
Reports  
screen



## CREATING A NEW REPORT

From the Report Maker screen, you can create new reports. When creating a report, you can either create it from scratch or you can copy an existing report and then modify it. The steps below are an overview of how to create a new report from scratch; following it are detailed explanations of each screen.

**To create a new report:**

1. Select the **Report Maker** button on the Main Menu.
2. On the Report Maker screen, select the **Report Type** for the report and click **Create New Report**.
3. On the **Report Description** screen, enter a report name, the title to be printed on the report, description, and creator, then click **Next**. You will be taken to the **Build Filter Statement** screen.
4. Create up to seven filter statements to select which records will appear on the report. Click **Next** to advance to the Select Fields to Include screen.
5. On the **Select Fields to Include on Report** screen, pick the fields to appear on the report. When done, click **Next** to advance to the Select Sort Order Fields screen.
6. On the **Select Sort Order Fields** screen, choose the field or fields by which the report will be sorted. Click **Next** to move to the Report Output Options screen.
7. On the **Report Output Options** screen, you may preview, print, or export your report. You may also change the report layout.
8. After printing or exporting the report, click **Exit**. You will be asked if you want to save the report. Click **Yes** if you want to save the report in the list of reports in this Report Type. Click **No** to discard the report and to return to the Report Maker menu.

Below are descriptions of each screen used when creating and modifying reports, and instructions for how to use them.

## REPORT DESCRIPTION SCREEN

The Report Description screen is where you enter the **Report Name** and **Report Description**, seen in Figure 18-4. These are for your reference, so you and other PastPerfect users at your institution can easily identify reports. The **Report Name** is a required field. This is the name that will appear on the Report Maker Menu and the Reports Menu.

The **Title as Printed on Report** field will be automatically filled in with the Report Name. If desired, you may enter a different name in this field that will print on the report. It is suggested that you fill in the **Created by** field with your name to help you and other users identify the report later on. This field is controlled by

the Users authority file. To access the authority file, right click or press **F7** on your keyboard.

**Create New Report**

Steps ———

Report Description ✓

Build Filter Statement

Select Fields to Include

Select Sort Order Fields

Report Output Options

**Report Description**

Enter a Report Name, Report Description and your name as the creator.

**Report Name**  
Acquired in 2008

**Title as Printed on Report**  
Acquired in 2008

**Report Description**  
Objects acquired in 2008

**Created by**  
[Yellow field]

**Date and Time**  
11/23/2009 11:09 AM

**Last Changed by**  
// : : AM

**Last Run by**  
// : : AM

**Data Table for this Report**  
OBJECTS

**Report Group**  
OBJECTS

Use the Users authority file to fill in the Created by field.

Delete this Report

Acquired in 2008

◀ Back    Next ▶    Exit

Figure 18-4 Report Description screen

The other fields on this screen will be filled in and updated automatically. Click **Next** to advance to the Build Filter Statement screen.

**TIP** You may jump to other steps in the report creation process by clicking the button for the desired step in the Sidebar on the left side of the screen.

## BUILD FILTER STATEMENT SCREEN

Every report is designed to extract a specific subset of information contained within your database. The Build Filter Statement screen is where you specify a set of conditions to determine the subset you are seeking. This set of conditions is your filter. The process of creating your filter statement is the same as running a query in the Research, Catalog Lists and Contacts Lists sections of the program.

The screenshot shows the 'Build Filter Statement' screen. On the left is a sidebar with the following steps: 'Report Description' (checked), 'Build Filter Statement' (selected), 'Select Fields to Include', 'Select Sort Order Fields', and 'Report Output Options'. The main content area has a title 'Build Filter Statement' and a help icon. Below the title is a message: 'A filter statement is required to select which records you want to appear on the report. Select Field, Condition, enter text in Value and click Add to Statement to build a filter statement.' The main form consists of three dropdown menus labeled 'Field', 'Condition', and 'Value'. To the left of these is a 'Clear Entries' button. To the right is a 'Match Case' checkbox and radio buttons for 'and' and 'or'. An 'Add to Statement' button is on the far right. Three callout boxes with arrows point to the dropdowns: 'Choose the field you want to search.', 'Choose the condition for your search.', and 'Enter what you are searching for.' At the bottom of the main area are buttons for 'View or Modify Filter Statement Syntax' and 'Delete Selected Filter Statement Line'. The footer contains 'Acquired in 2008', 'Back', 'Next', and 'Exit' buttons.

Figure 18-5 Build Filter Statement screen

The Build Filter Statement screen allows you to build a filter statement from field and condition drop-down menus and using “and” and “or” operators to either narrow or expand the query.

## Simple Filter Statements

To begin, choose one of the fields from the **Fields** drop-down menu. Then use the **Condition** drop-down list to pick from choices such as “Begins with,” “Contains text,” “Greater than,” “Greater than or equal to,” “Less than,” “Less than or equal to,” “Is empty,” “Is within list,” and “Does not contain text” to start the filter statement.

### TIP

You may choose the fields that are available in the Field drop-down menu by going to the Main Menu | Setup | Report Maker Fields section.

In the **Value** box to the right of Condition, enter the word or words (or dates, numbers, etc.) you want to find; capitalization is not important unless you check the **Match Case** box. Depending on the field being searched, you can access the authority file for that field. The authority file icon will appear in the upper right corner if an authority file is available. You may right click in the field or press **F7** on your keyboard to access the authority file.

Click on the **Add to Statement** button to add this filter statement to the query. It will appear in the **Filter Statement** field below. If this filter is sufficient to find the data you need, click **Next** at the bottom of the screen.

In Figure 18-6, we searched the Accession# field for records that begin with “2008.”

Figure 18-6  
Example  
Filter State-  
ment

Figure 18-6 shows the "Build Filter Statement" dialog box in a report maker application. The dialog is titled "Build Filter Statement" and includes a sidebar with the following steps: "Report Description" (checked), "Build Filter Statement" (active), "Select Fields to Include", "Select Sort Order Fields", and "Report Output Options".

The main area of the dialog is titled "Build Filter Statement" and contains the following information:

- A message: "A filter statement is required to select which records you want to appear on the report. Select Field, Condition, enter text in Value and click **Add to Statement** to build a filter statement."
- A table with the following columns: "Field", "Condition", and "Value".
 

Field	Condition	Value
Accession#	Begins with	2008
- Buttons: "Clear Entries", "Match Case" (unchecked), radio buttons for "and" (selected) and "or", and "Add to Statement".
- A "Filter Statement" field (empty).
- Buttons at the bottom: "View or Modify Filter Statement Syntax" and "Delete Selected Filter Statement Line".

## Complex Filter Statements

If additional conditions must be met to find the records you seek for this report, you may continue adding conditions. In the **Field** drop-down menu, select another field, choose a **Condition** from the drop-down list, and enter a **Value**. Next, you must select an AND or OR connector.

### AND/OR Connectors

If your filter includes more than one condition, the conditions will need to be strung together with AND or OR connectors. How you connect the various conditions makes a big difference in the results. Let's look at an example of connecting two filters, "material equals wood" and "collection equals Rocky Pine Ranch Collection," with AND and OR.

**AND** - In the example "material equals wood AND collection equals Rocky Pine Ranch Collection," every record included in the results must meet both conditions. The material must be wood and the collection name must be Rocky Pine Ranch Collection. *Rule: The conditions on both sides of the AND connector must be true.*

**OR** - In the example "material equals wood OR collection equals Rocky Pine Ranch Collection," records included in the results can meet either condition, not necessarily both conditions. The results will show all items made of wood and all items with the collection name Rocky Pine Ranch Collection. Some items may meet both conditions, but items can still be included if the material is wood and the collection is something other than Rocky Pine Ranch Collection; alternately items can be included if the material is something other than wood, as long as the collection is Rocky Pine Ranch Collection. *Rule: Only one side of the OR condition must be true.*

Once you have selected your operator, click **Add to Statement**. Continue adding statements and choosing operators as needed. If you wish to edit or remove a line of your filter statement, click on that line, then click the **Delete Selected Filter Statement Line** button, directly underneath the filter statements.

### View or Modify Filter Statement Syntax

If you have a complex filter statement with AND and OR connectors, you may need to modify your filter statement further to get the results you need. By clicking the **View or Modify Filter Statement Syntax** button, you can view the Boolean statement that PastPerfect uses in your filter. The filter in this syntax will look

different from the filter statement you built from the drop-down menus. To modify this statement, click the **Edit** button on the Filter Statement screen.

The most common modification needed for complex statements with AND and OR connectors is inserting parentheses. The placement and organization of these parentheses can make a difference in the results. If you create queries with AND and OR conditions, use parentheses to ensure you get the results you are expecting. Parentheses dictate how the query is interpreted. The query is evaluated first in the innermost parentheses. Without parentheses, the query conditions are evaluated from left to right and top to bottom.

For example, say you want to find the contacts who made monetary donations in either 2006 or 2007 and in either 2008 or 2009. You would create your report in the Contacts Report Type and your filter statement before adding parentheses would look like Figure 18-7.

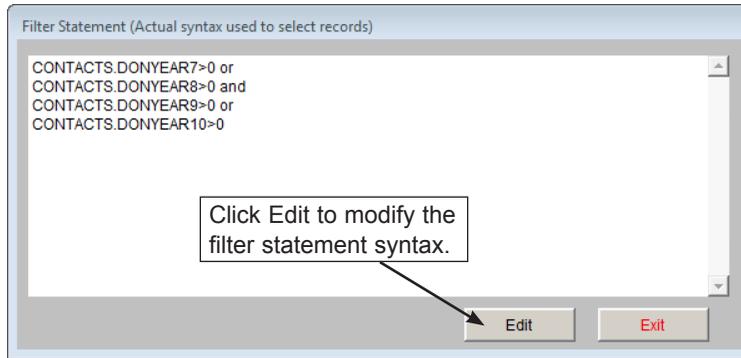
The screenshot shows the 'Build Filter Statement' screen in a report maker. On the left, a sidebar lists steps: 'Report Description', 'Build Filter Statement' (which is active and has a checkmark), 'Select Fields to Include', 'Select Sort Order Fields', and 'Report Output Options'. The main area is titled 'Build Filter Statement' and includes a help icon and text: 'A filter statement is required to select which records you want to appear on the report. Select Field, Condition, enter text in Value and click **Add to Statement** to build a filter statement.' Below this is a form with three dropdown menus: 'Field', 'Condition', and 'Value'. The 'Value' dropdown is currently set to '0.000'. There are also buttons for 'Clear Entries', a checkbox for 'Match Case', radio buttons for 'and' and 'or', and a button for 'Add to Statement'. At the bottom of the main area, there is a 'Filter Statement' box containing the text: 'Donations in 2006-Greater than-0.00-or Donations in 2007-Greater than-0.00-and Donations in 2008-Greater than-0.00-or Donations in 2009-Greater than-0.00'. At the very bottom of the interface are two buttons: 'View or Modify Filter Statement Syntax' and 'Delete Selected Filter Statement Line'.

Figure 18-7 Example Filter Statement

If you run the report with this filter, you may get people on the report who did not give in either 2008 or 2009. To get the results you want, you will need to insert parentheses. Since you want contacts who donated in either 2006 or 2007, we will need to group those together with parentheses so that PastPerfect looks at them as one condition. The same must be done for donations in 2008 or 2009. Then these

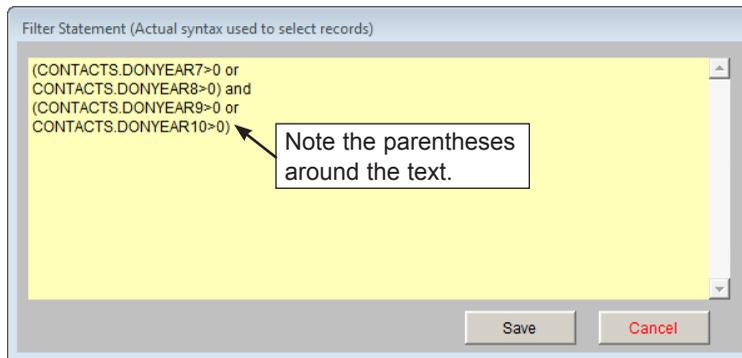
two conditions will be joined with “and.” To edit the filter, click **View or Modify Filter Statement Syntax** to view the statement. It will look like this:

Figure 18-8  
Filter Statement  
Syntax



To add the parentheses, click **Edit**. Click in the Filter Statement field, then type in the parentheses in the appropriate locations. The filter will look like this:

Figure 18-9  
Edited Filter  
Statement

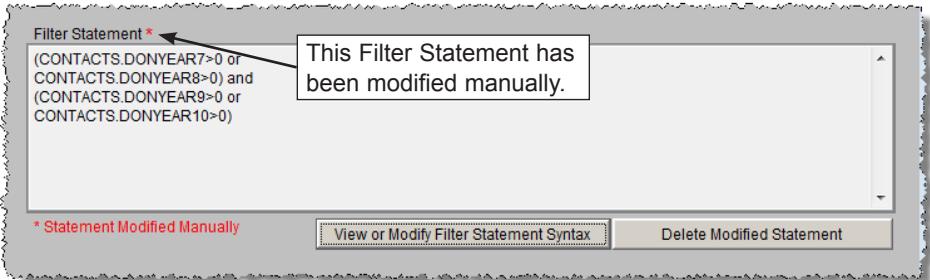


Inserting the parentheses forces PastPerfect to look at the first two conditions together so that contacts who made donations in 2006 or 2007 are considered for the report. Then it looks at the last two conditions so that contacts who made donations in 2008 or 2009 are considered. Once it finds those two groups of people, it includes only those contacts who are in both those groups because there is an AND between them. PastPerfect evaluates the conditions in parentheses first, then evaluates the conditions outside (or in this case between) the parentheses.

Click **Save** to save your modifications, then click **Exit** to close the Filter Statement screen.

A note appears below the statement indicating it has been manually modified. Once a filter has been manually modified, you can continue to modify it manually. If you want to add or delete a condition, you must do it manually. If you add another condition using the drop-down fields, your modifications will be erased and the condition will be added to the original filter statement. If you select a line of the modified filter statement and click **Delete Selected Filter Statement Line**, the entire filter will be deleted.

Figure 18-10  
Modified  
Filter  
Statement  
screen



Once your filter statement is finished, click **Next** to advance to the **Select Fields to Include** screen.

## SELECT FIELDS TO INCLUDE ON REPORT SCREEN

When you design your report, you need to think about what information you want to include in the results. In most cases, you won't need to see every field in the database. The Select Fields to Include on Report screen is where you specify the fields you want to see on the report, seen in Figure 18-11.

To choose a field, double click on it in the list of **Available Fields** on the left side of the screen. It will appear in the right column for **Fields to Include on Report**. To include images on the report, choose **Image (picture)**. As you select the fields, you establish the order in which they appear on the report. You may change the order of the fields by clicking the grey box to the left of the field name and dragging it up or down until it is in the correct order. If you want to delete a field that you have selected, double click on it and it will return to the list of Available Fields. To start over, click the **Clear List** button to the right of the Fields to Include column.

When the fields to appear on the report have been chosen, click **Next**.

**TIP**

The fields in the Available Fields list are selected by going to the Main Menu | Setup | Report Maker Fields section.

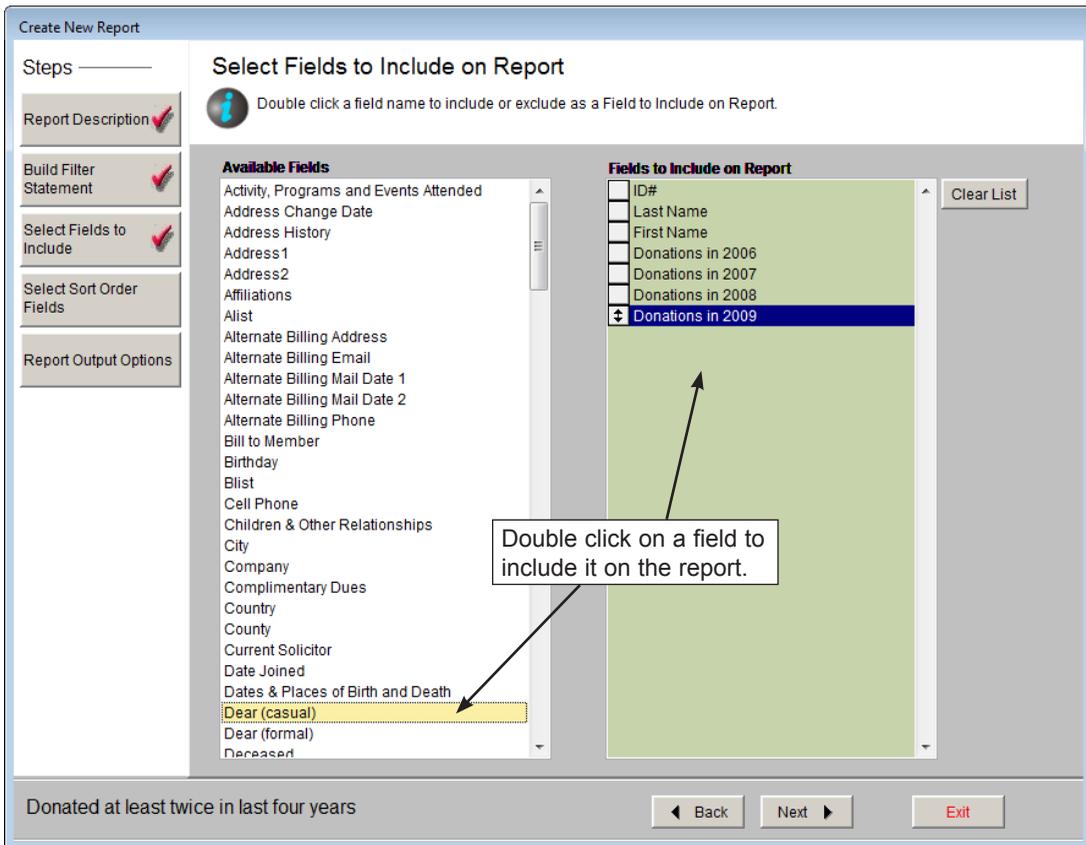


Figure 18-11 Select Fields to Include on Report screen

## SELECT SORT ORDER FIELDS SCREEN

The Select Sort Order Fields screen lets you determine how your results will be sorted. To select a sort field, double click on it in the list of **Available Fields**. It will appear on the list of **Fields to Sort by**. You may specify up to five different sort fields. To start over, click the **Clear List** button.

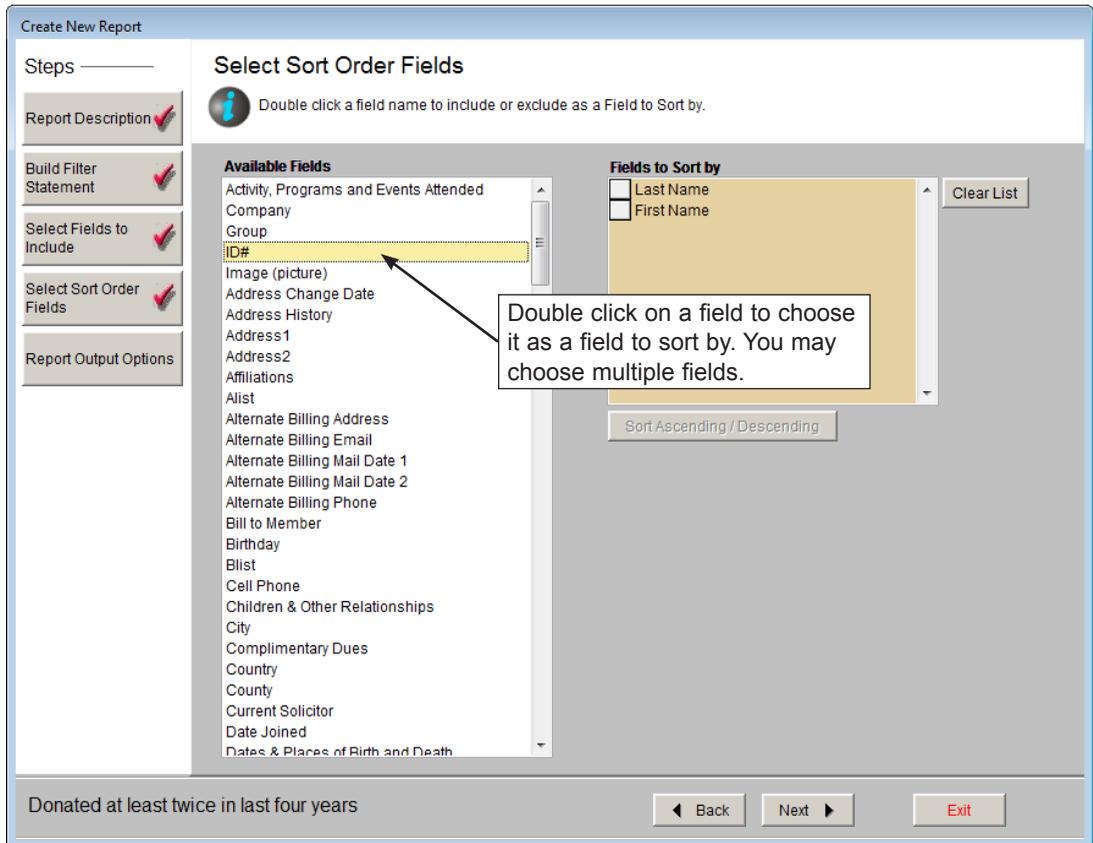


Figure 18-12 Select Sort Order Fields screen

**Sort Ascending/Descending** - You can sort by a selected field in either ascending or descending order. (The default is ascending.) To change the order, highlight a field in the list. Click **Sort Ascending/Descending** to toggle between ascending and descending order. If you have specified descending order, then the “~Descending” indicator appears next to the field. If you have specified more than one sort field, changing the status of ascending or descending does not move fields to a different position in the list. (The first field in the list is sorted before the second, and so on.)

Once your sort order fields are selected, click the **Next** button.

## REPORT OUTPUT OPTIONS SCREEN

Report Maker lets you send the results to a variety of formats, including printed reports, MS-Excel, MS-Word, PDF, HTML, database, text, and XML files. Alternately, you can view your results on screen without writing the results to another format.

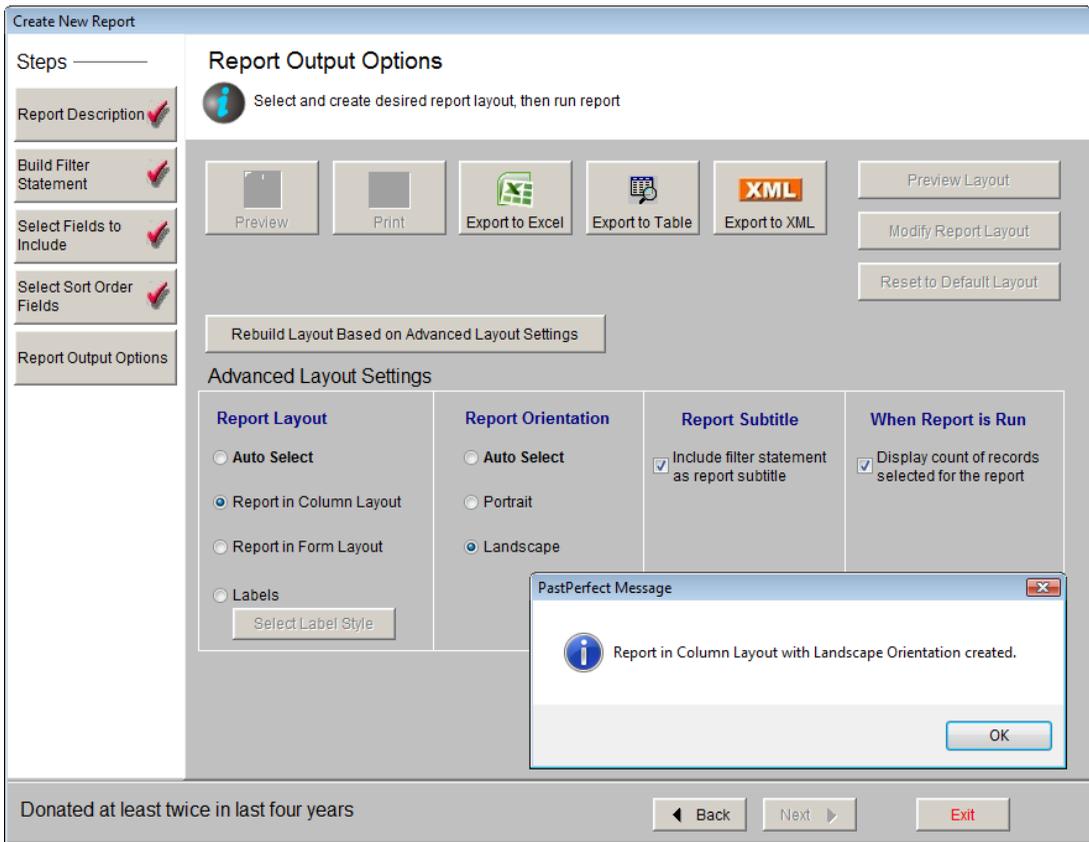


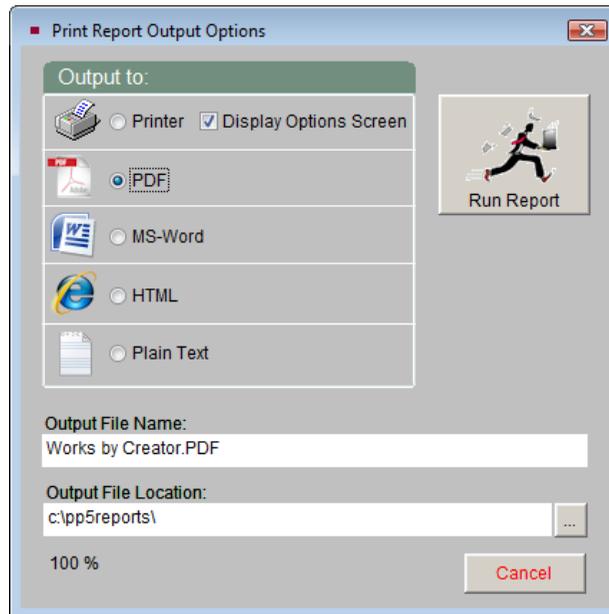
Figure 18-13 Report Maker Report Output Options screen

When you first create a report, the default report output is a column layout report in either portrait or landscape orientation (whichever best fits with your chosen output fields). Upon clicking **Next** on the Select Sort Order Fields screen, you will see the screen in Figure 18-13, with a message telling you your report was created in either portrait or landscape orientation. Click **OK** on this message. You will now have access to all the options on this screen.

**Preview** - Previews the report in the selected layout.

**Print** - Clicking the **Print** button on the Print Reports screen will display the **Print Report Output Options** screen. From this screen you may send your report to a printer, or choose other formats for your report.

Figure 18-14  
Report Output  
Options screen



You can change your printer options by selecting **Printer** and **Display Options Screen**. When you click **Run Report**, you will see your printer's dialog box where you can select other printers or change your printer options.

If you would like to create your report in PDF format, MS-Word, HTML, or Plain Text, click the radio button next to the desired report format. The **Output File Name** at the bottom of the screen will display the name of the report that will be created. You may change the name by typing in the field, but it is not suggested that you change the file extension. The **Output File Location** field will display the location on your computer or network where the report will be saved. You may change the location by clicking the button with the three dots and choosing a different location. To create the report, click **Run Report**. Then navigate to the location where the file was saved to view the report.

**Export to Excel** - Click this button to export the report results to MS-Excel. The file will open in HTML using your computer's MS-Excel. The file is saved in HTML (.htm) format and stored in the PP5Reports folder on your local hard drive (usually C:/). If you wish to save it as an XLS file, go to the Save As function in the

Excel File menu and choose “Microsoft Office Excel Workbook” as the file type. This Excel file will contain the selected output fields in the selected sort order for the resulting records.

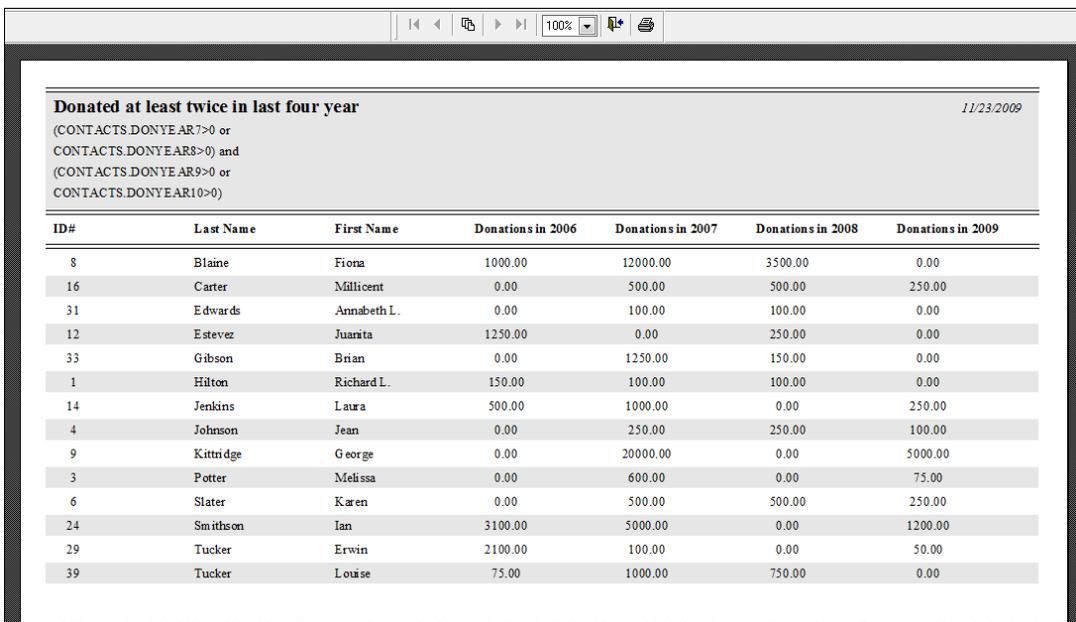
**Export to Table** - This button will create a dBase file (.dbf) containing your report results. The file stored in the PP5Reports folder on your local hard drive (usually C:/). This file will contain the selected output fields in the selected sort order for the resulting records.

## Advanced Layout Settings

If the default report layout for the previewed or printed report does not have the appearance you want, you may modify the layout. You have the option to change the Report Layout, Report Orientation, Report Subtitle, and When Report is Run options.

### Report Layout

The most common and default report type is **Report in Column Layout**. On this report, each field is listed as a column, as in Figure 18-15. This report is great if you have only a few fields. Creating a column report with more fields than will fit across the paper will result in some fields being excluded.



ID#	Last Name	First Name	Donations in 2006	Donations in 2007	Donations in 2008	Donations in 2009
8	Blaine	Fiona	1000.00	12000.00	3500.00	0.00
16	Carter	Millicent	0.00	500.00	500.00	250.00
31	Edwards	Annabeth L.	0.00	100.00	100.00	0.00
12	Estevez	Juanita	1250.00	0.00	250.00	0.00
33	Gibson	Brian	0.00	1250.00	150.00	0.00
1	Hilton	Richard L.	150.00	100.00	100.00	0.00
14	Jenkins	Laura	500.00	1000.00	0.00	250.00
4	Johnson	Jean	0.00	250.00	250.00	100.00
9	Kittidge	George	0.00	20000.00	0.00	5000.00
3	Potter	Melissa	0.00	600.00	0.00	75.00
6	Slater	Karen	0.00	500.00	500.00	250.00
24	Smithson	Ian	3100.00	5000.00	0.00	1200.00
29	Tucker	Erwin	2100.00	100.00	0.00	50.00
39	Tucker	Louise	75.00	1000.00	750.00	0.00

Figure 18-15 Example Report in column layout

For reports with more fields (where even a Landscape orientation does not accommodate them), choose **Report in Form Layout**. With this style of report, fields for each record are listed each below the other, with the field names on the left side of the report, as in Figure 18-16.

The screenshot shows a report window with a toolbar at the top. The report title is "Donated at least twice in last four year" with a date of 11/23/2009. The report contains three records, each with a list of fields and their values.

Donated at least twice in last four year		11/23/2009
(CONTACTS.DONYEAR7>0 or CONTACTS.DONYEAR8>0) and (CONTACTS.DONYEAR9>0 or CONTACTS.DONYEAR10>0)		
ID#	8	
Last Name	Blaine	
First Name	Fiona	
Donations in 2006	1000.00	
Donations in 2007	12000.00	
Donations in 2008	3500.00	
Donations in 2009	0.00	
ID#	16	
Last Name	Carter	
First Name	Millicent	
Donations in 2006	0.00	
Donations in 2007	500.00	
Donations in 2008	500.00	
Donations in 2009	250.00	
ID#	31	
Last Name	Edwards	
First Name	Annabeth L.	
Donations in 2006	0.00	
Donations in 2007	100.00	
Donations in 2008	100.00	
Donations in 2009	0.00	

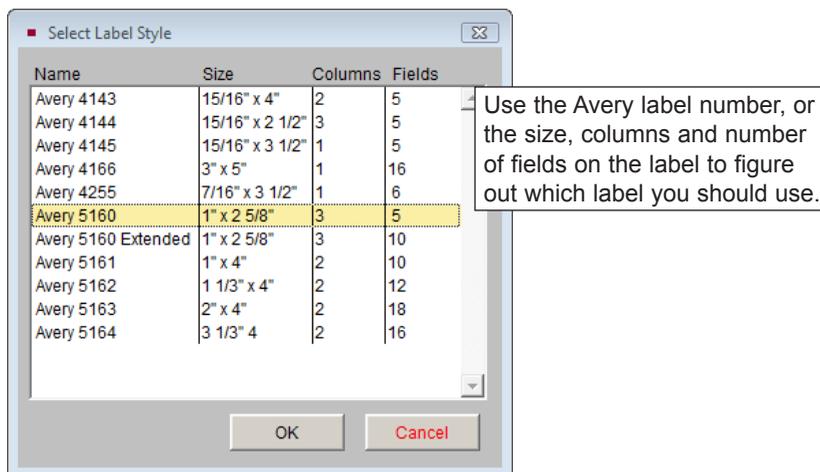
Figure 18-16 Example Report in form layout

To have PastPerfect choose the report layout for you, based on the number of output fields you have selected, choose **Auto Select**.

If you want to print address, barcode, or catalog card labels from your report results, you may use the **Labels** option. You will need to select the label style you want to use; do this by clicking the **Select Label Style** button. You will see the screen shown in Figure 18-17.

Next, click on the label you would like to use, based on the size of the label, the number of fields and columns on the label. Click **OK** to select the style.

Figure 18-17  
Select Label  
Style screen



Once you have changed your Report Layout type, you must click **Rebuild Layout Based on Advanced Layout Settings** before you can preview or print your report.

### Report Orientation

By default, PastPerfect will be set to **Auto Select**, which determines whether your report should be in Portrait or Landscape orientation based on the number of output fields you have selected.

If you would like to change your report orientation, select either **Portrait** or **Landscape**. Portrait will align the page so that its width is 8 ½" and height is 11". Landscape will align the page so that it is 11" wide and 8 ½" high.

Once you have changed your Report Orientation, you must click **Rebuild Layout Based on Advanced Layout Settings** before you can preview or print your report.

### Report Subtitle

By default, the Report Title that you entered on the Report Description screen will print on the top of your report and the filter statement used to select records will print below it as the subtitle. You can choose to remove the filter statement as the subtitle to the report by unchecking the box next to **Include filter statement as report subtitle**. Including the filter statement on the report can help others understand how the report was generated.

### When Report is Run

By default, PastPerfect will prompt you with the number of records selected for

the report before you preview or print the report. If you want to turn this message off, uncheck the box next to **Display count of records selected for the report**.

### **Preview, Modify, and Reset Layout**

These buttons allow you to make and view further modifications to your report layouts:

**Modify Report Layout** - Opens the Report Designer screen, where you may move fields and change the formatting of the report. Making these report modifications are explained in detail in *Chapter 19 - Advanced Report Modifications*.

**Preview Layout** - Displays your report with report modifications without filling in the data fields. This gives you an idea of how the report will look on the page before you preview or print the report.

**Reset to Default Layout** - Restores the report form to its original state (the form layout with either Portrait or Landscape orientation). All changes are removed. If you modified the report layout and you do not like the changes, use this to start over.

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## NOTE

When you click Exit after creating your report for the first time, you will be asked if you want to save your report. Click Yes to save the report, or click No to discard the report.

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## MODIFYING AN EXISTING REPORT

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You may find it is easier to change an existing report rather than create a new one from scratch. For example, if you created a report to list all the Object records cataloged between the beginning of the month and the end of the month, but you want to run the report at the end of every month, you can modify the report you created rather than creating a new report for each month. You would just need to change the Filter Statement on the report to use different cataloged dates.

To modify a report, first select the report from the Report Maker screen and click **Modify** to display the Change Report screen. Using the buttons on the left under Steps, you may:

- Change the Report Description
- Build Filter Statement
- Select Fields to Include
- Select Sort Order Fields
- Change Report Output Options

Change Report

Steps

- Report Description ✓
- Build Filter Statement ✓
- Select Fields to Include ✓
- Select Sort Order Fields ✓
- Report Output Options ✓

**Report Description**

Enter a Report Name, Report Description and your name as the creator.

Report Name: Objects Cataloged in October 2009

Title as Printed on Report: Objects Cataloged in October 2009

Report Description: [Empty text area]

Created by: Parr, Mary L. Date and Time: 11/02/2009 12:00 PM

Last Changed by: Unknown Date and Time: 11/02/2009 12:02 PM

Last Run by: [Empty] Date and Time: // : : AM

Data Table for this Report: OBJECTS Report Group: OBJECTS

Delete this Report

Objects Cataloged in October 2009

Back Next Exit

Figure 18-18 Change Report screen

Click the button for the step where you would like to make changes. Please refer to the descriptions of each screen above for instructions on how to make specific

changes. Once the changes have been made, go to the **Report Output Options** screen and preview, print, or export your report.

## RUNNING AN EXISTING REPORT

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You may run an existing report from the Report Maker screen or the main Reports screen. To run a report from the Report Maker screen, click the Report Type under which the report was created, or click **View All** at the top. Highlight the report then click **Run** at the top. You will have the options to Preview, Print, Export to Excel or Export to Table.

To run a report from the Reports screen, click **Reports** on the Main Menu to show the Reports screen. Select the Report Type in which the report was created. Report Maker reports will be listed with an asterisk in front of them. Highlight the report, then click **Run Selected Report**. You will have options to Preview, Print, Export to Excel or Export to Table.

