

REPORTS

PastPerfect includes more than 300 predefined reports and a powerful new custom Report Maker. All reports may be viewed, printed, or output as PDF, MS-Word, HTML, or Plain Text file. Many reports can also be exported to Excel. By selecting Reports | System | Reports in PastPerfect from the Main Menu, you can print a list of all the predefined reports, including a description of each report.

This chapter will examine the predefined reports in PastPerfect and show you how to run these reports. It will also highlight some of the most useful reports. *Chapter 18 - Report Maker* will cover the Report Maker function, where you create your own reports. Modifying reports and labels will be covered in *Chapter 19 - Advanced Report Modifications*.

Here are three definitions that will help when reading the report chapters:

Database - A collection of similar information stored in a file. PastPerfect data is contained in numerous databases. The Objects, Photos, Archives, and Library catalogs are each separate databases. Some of the other databases are Accession, Contacts, Dues, Donations, Pledges, Incoming Loans, Outgoing Loans and Exhibits.

Record - Each database contains any number of records. For example, if your Objects catalog has 4350 items, the Objects database contains 4350 records. While in Browse mode, each record is represented as one row.

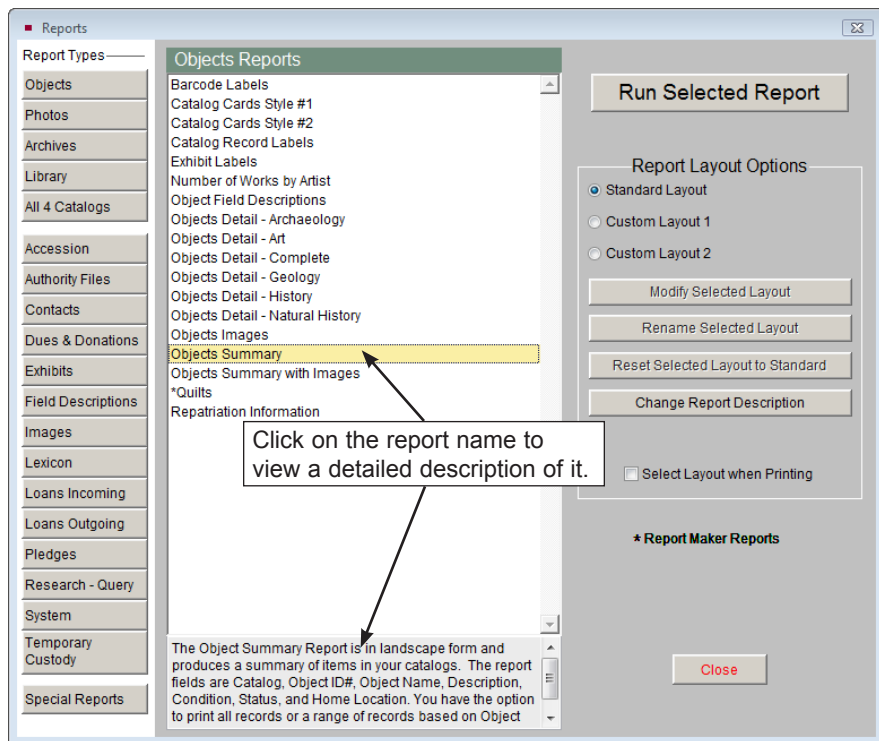
Field - Within each record of a database are numerous fields. This is where each piece of data is stored. While in Browse mode, each field is represented by a column. For example, each record in the Objects database contains over 250 fields, such as Object ID, Object Name, and Home Location.

THE REPORTS SCREEN

To view a list of all reports, both predefined and reports created with Report Maker, click the **Reports** button on the Main Menu to open the screen seen in Figure 17-1.

The reports are separated into 19 report types, by database: Objects, Photos, Archives, Library, All 4 catalogs (Objects, Photos, Archives and Library), Accession, Authority Files, Contacts, Dues & Donations, Exhibits, Field Descriptions, Images, Lexicon, Loans Incoming, Loans Outgoing, Pledges, Research - Query, System, and Temporary Custody.

Figure 17-1
Reports Menu



To view a list of reports in a database, click on the desired database button under **Report Types** on the left side of the screen. For example, if you click on the **Objects** button, a list of Objects reports will be displayed in the middle of the screen. To view a detailed description of a report, click on the report name. The

description will appear at the bottom of the screen. Report names that begin with an asterisk are reports that have been created with Report Maker; they are not pre-defined reports.

RUNNING CATALOG DETAIL AND SUMMARY REPORTS

Catalog Detail and Summary reports may be printed for Objects, Photos, Archives, and Library records. The Detail reports print a one or multiple page report for each record. The Objects Detail reports are geared to different artifact categories: Archaeology, Art, Geology, History, and Natural History. The Archives Detail reports are also separated by categories: Maps, Music, and Oral History. These reports include fields specific to each category. The Objects Detail - Complete report includes all Objects fields, while the Archives Detail report includes the standard archival fields.

The Summary reports for Objects, Photos and Archives print the Catalog, Object ID, Object Name, Description, Condition, Status, and Home Location for each record, with multiple records per page. The Shelf List is the Summary report for the Library catalog and includes the Call#, Title, Author, Subjects and Home Location.

To run a report, click on the report name and click the **Run Selected Report** button. Before printing a report you will be provided with options to produce just the results you need. You can select the records included on the report by entering ranges of records. You can also select the sort order for the report. For example, if you select the Objects Summary with Images report from the Objects Reports list, the **Print Object Reports** selection screen will display, as in Figure 17-2.

In the section **Narrow List of Records to Include by Ranges Entered Below**, you can change ranges of Object IDs, Object Names, Status, Collections, and Home Locations to include only selected Object Catalog records on the report. By default, all records will be included. The **From** and **To** boxes for each field are pre-filled with the first and last entries in a field when the catalog is sorted on that field, either alphabetically or numerically. For example, the first Object Name alphabetically is "Abacus" and the last Object Name is "Weight, Net."

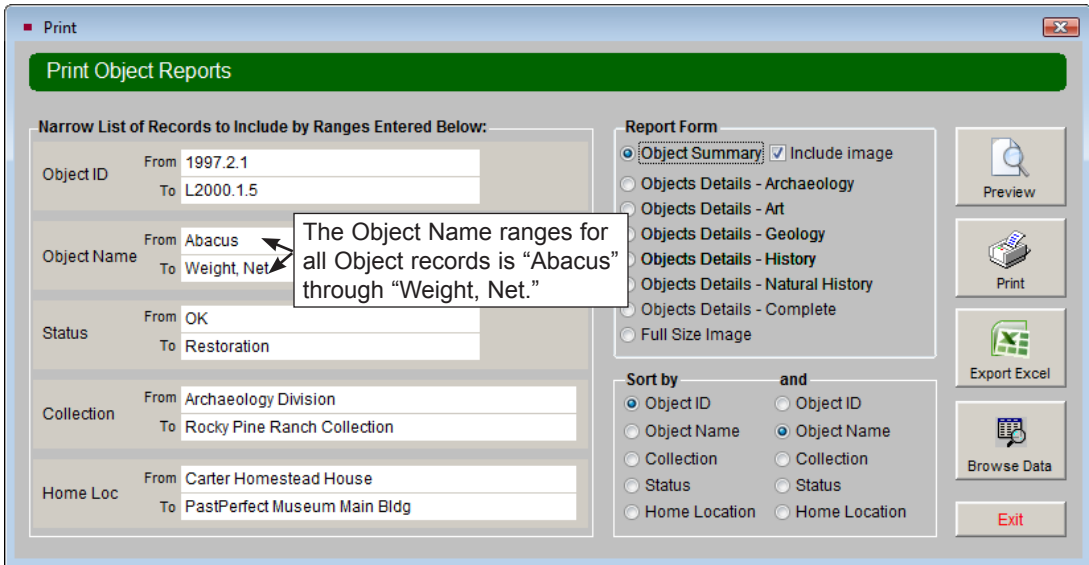
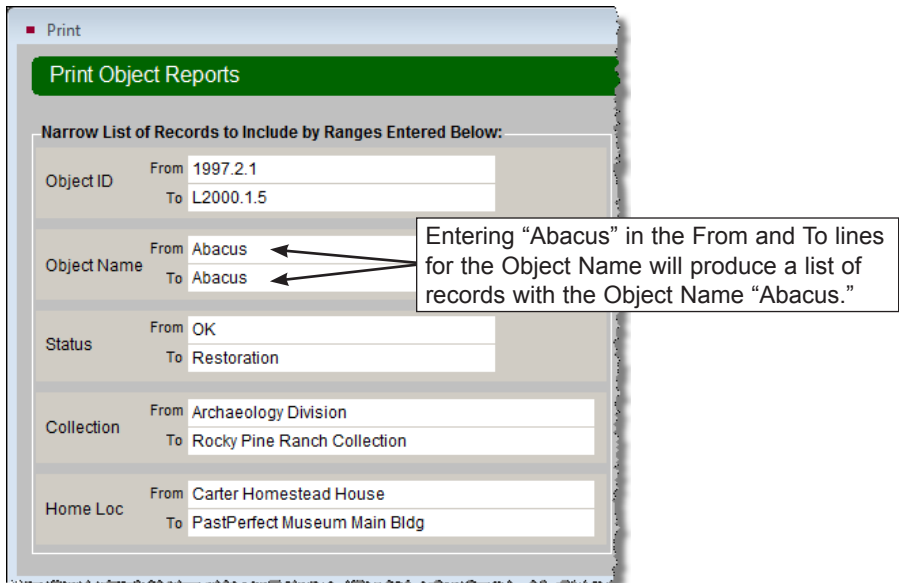


Figure 17-2 Print Reports screen

If you want to print a report of items with the Object Name “Abacus,” leave the **From** box with “Abacus” and change the **To** box to “Abacus,” shown in Figure 17-3.

Figure 17-3
Print Object
Report for
Object Name
Abacus



In most cases, you should change the entries for only *one* field. Narrowing the list based on two or more fields may produce no results at all. For example, selecting a range of Object IDs from 2008.1.1 to 2008.999.9999 and a range of Object Names from “Abacus” to “Abacus” would produce a list of abaci with Object IDs beginning with 2008. If there were no abaci with Object IDs beginning with 2008, then no records would be selected.

TIP

If you are narrowing your list of records by one field, you should change the entries for just that one field, and leave the other fields as they are by default. Do NOT remove the data from the other fields. If you do, PastPerfect will look for records with those fields blank. You may find no results.

When choosing your entries for the **From** and **To** fields, remember that you will be selecting records as they appear in the catalog sorted by that field. For example, if you enter the collection names **From** “Krantz Collection” and **To** “W,” the list would not include the Waiahukini Archaeology Collection because the records with the Waiahukini Archaeology Collection name would be listed alphabetically after records with just “W” for a collection name. A more effective entry might be **From** “K” and **To** “WZZZ.” Entries are not case sensitive.

To make entering your ranges easier, you may use the authority file if one is available. If an authority file is available, you will see the authority file flag appear. Right click or press **F7** to access the authority file.

TIP

Catalog Detail reports may be run for one record at a time by going to the desired catalog record and clicking Print in the Navigation Bar at the top of the screen.

The Detail and Summary reports allow you to choose the sort order of the results. For the Objects, Photos, Archives, and Library Catalog reports, the results can be based on two sorts. The results will be sorted by the first chosen field, then in the case that there are two results with the same data in the first chosen field, the results will be sorted by the second field. For example, if you sort first by Home Location, the results will be sorted alphabetically by locations. For records that are in the same location, the results will be sorted by your second sort choice.

Figure 17-4
Report Sort
Order

Sort by and

Object ID Object ID
 Object Name Object Name
 Collection Collection
 Status Status
 Home Location Home Location

Choose a primary and secondary sort order.

For these reports, like the Objects Summary with Images, you may change your report form on the Print Object Reports screen. To use a different report form, select the radio button next to the desired report form. You may find you want to preview different report forms for the same range of records before you select one to print.

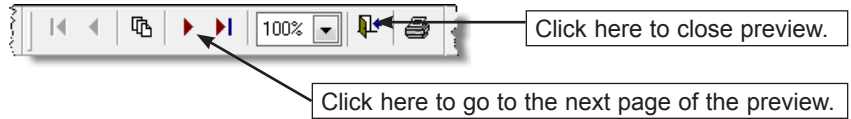
Before you print a report, use the **Preview** button to display the results on your screen.

Catalog / Objctid / Objname	Description	Condition	Status	Home Location
O 2003.2.1 Chair	Painted wooden side chair. Chair splat is decorated with gold stencil design of acorns, oak leaves, and berries. In addition there are gold-stencilled downward facing arrows on stiles. The legs are turned and decorated with gold bands. Hand-woven rush seat made from the female leaf of the common cattail plant, Typhon latifolia. The leaves are woven directly to the frame. The chair, is a revival, made after the Hitchcock Chair Company was revived in 1948.	Good	OK	Carter Homestead House
O 1998.1.3 Print	This woodblock watercolor monoprint depicts a sailboat leaving port between two turrets or towers. Buildings appear in the background. The print is signed twice. The original signature is center bottom. The second signature is lower right. "A/P 1 c 1974 J. Oliver". The first signature falls outside the matted area.	Good	OK	Museum Archives
O 1998.2.1 Chupea harengus	Fossilized herring in sandstone matrix. Typewritten paper tag on back reads, "HERRING LOWER EOCENE 50,000,000 YEARS OLD".	Excellent	On Loan	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.		OK	Museum Main Bldg

Figure 17-5 Report Preview screen

The **Print Preview** toolbar on the report preview screen has buttons that allow you to view different pages, jump to the first or last page, zoom in or out, print the report, and close the preview.

Figure 17-6
Report Preview
buttons



When you click on the **printer** icon on the report preview screen, the entire report will be sent to your printer. If you want more print options, close the preview and click the **Print** button to see the Print Report Output Options.

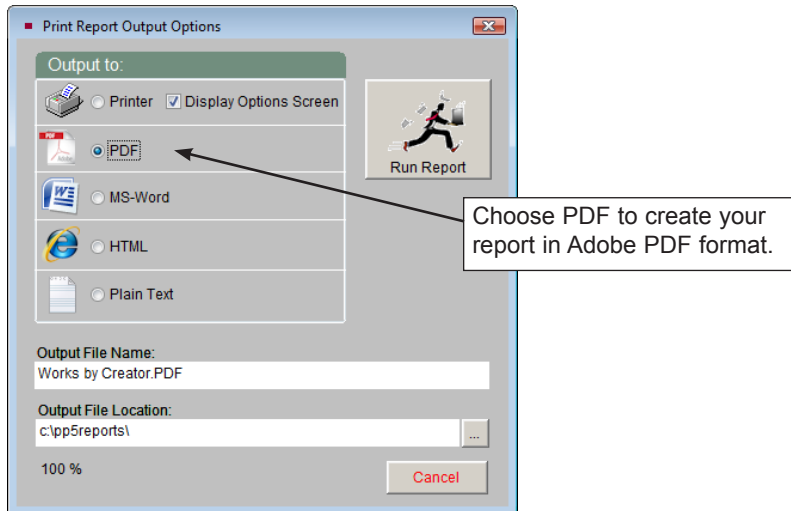
NOTE

If you have checked the Select Layout when Printing box when choosing the report to run, you will see a Select Layout screen after clicking Preview or Print. This enables you to pick the standard layout or one of the custom layouts you created for this report.

Report Output Options

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 17-7
Print Report
Output
Options



NOTE

You can enable or disable the Print Report Output Options screen by going to the Main Menu | Setup | Workstation Settings and checking or unchecking the Output Reports to PDF, Word, HTML, etc. box at the bottom of the 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.

To export the report results to MS-Excel, on the **Print Report** screen click the **Export Excel** button. 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 almost all of the data fields for the resulting records.

The Print Reports screen also gives you the option to **Browse Data**. By clicking this button, you can view the resulting records in a Browse screen format. The Browse screen includes all data fields for the resulting records.

RUNNING CATALOG CARD AND LABEL REPORTS

These reports may be printed for Objects, Photos, Archives, and Library records. They include Catalog Card Styles 1 and 2, Catalog Record Labels, Exhibit Labels, Barcode Labels (with the optional Barcode Printing Upgrade), and Spine Labels for Library records.

To print one of these reports, select the database, then highlight the desired report and click **Run Selected Report**. For this example, we will select Library Spine Labels. The Print Library Catalog Cards screen will appear.

Figure 17-8
Print Library
Catalog Cards
screen

Print Library Catalog Cards

Narrow List of Records to Include by Ranges Entered Below:

Object ID	From	1997.1.1	To	L2000.1.4
Object Name	From	Book	To	Booklet
Call#	From	91-23914	To	Z710.G27 1979
Catalog Date	From	06/03/1997	To	07/29/2009
Home Loc	From	PastPerfect Museum Library	To	PastPerfect Museum Main Bldg
Updated	From	03/01/2004 10:49 AM	To	12/26/2009 02:15 PM

Card Type

- Catalog Card Style #1
- Catalog Card Style #2
- Catalog Record Labels
- Exhibit Labels
- Barcode Labels
- Spine Labels

Print Order

- Call#
- Title
- Author
- Object ID
- Catalog Date

#Copies of Each Card

Start Position

Print Catalog Cards for

- Author
- Title
- Subjects

Buttons: Preview, Print, Export Excel, Browse Data, Exit

To print your cards and labels, you will have the same options to narrow the ranges of records as you do when running Catalog Detail and Summary reports. Please see the section earlier in this chapter explaining how to narrow the range of records.

On the right, you may select your **Card Type** by clicking the radio button next to your choice. The **Print Order** determines the order in which the cards will be printed. You may print more than one copy of each card or label by changing the number in the **#Copies of Each Card** field. The **Start Position** number determines the card or label on which printing will begin. For example, if you are printing spine labels and you have used the first 3 labels on the page (horizontally), you can set the Start Position to "4" so it will begin printing on the 4th label.

Library cards also have the option to be printed for each Author, Title, and Subject per record. For example, if you have three Subjects on a record, you can print three Subject cards, one for each Subject. This allows you to print catalog cards similar to those used in a card catalog. Please note that if you have more than one

of these boxes checked, you will have more than one card printed for each record. You must select at least one box to have cards printed.

The Catalog Card and Label reports have the same Report Output Options as the Catalog Detail and Summary reports, as described earlier in this chapter.

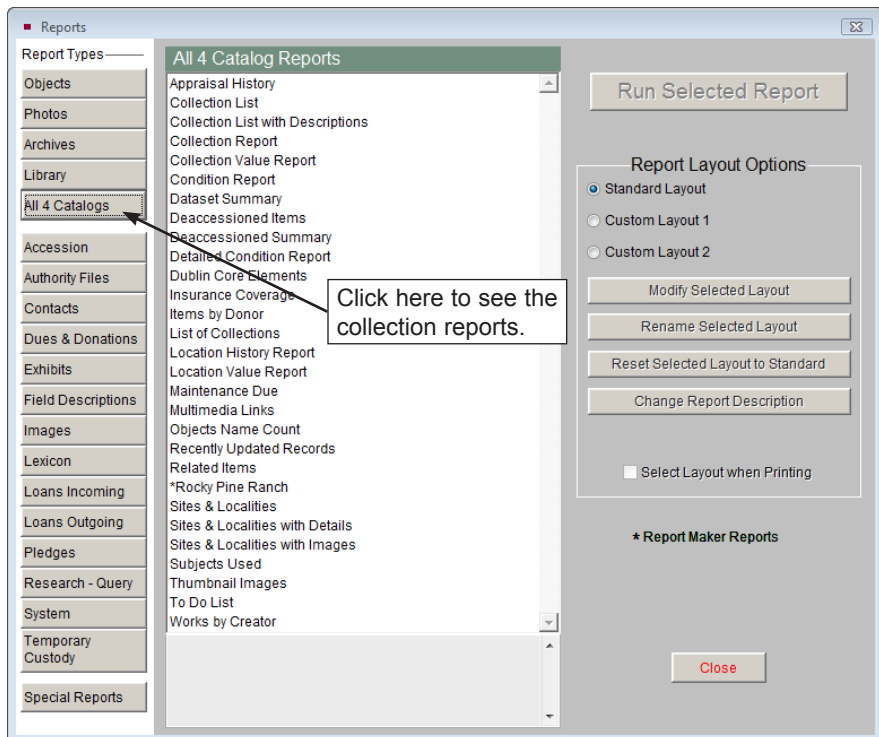
TIP

Catalog Card and Label reports may be run for one record at a time by going to the desired catalog record and clicking Print in the Navigation Bar at the top of the screen.

RUNNING COLLECTION REPORTS

If you need reports that include records from the Objects, Photos, Archives, and Library catalogs on one report, PastPerfect has predefined reports to help you. These reports are found by clicking the **All 4 Catalogs** button under Report Types.

Figure 17-9
All 4 Catalog
Reports



These reports may have ranges where you can select the records included on the report, similar to the Catalog Detail and Summary reports. For example, the Collection List report will print Objects, Photos, Archives, and Library records, and you can use the Object ID, Object Name, Collection, Status, and Home Location fields to narrow the records from those catalogs included on the report. If you would like all of the Object, Photo, Archive, and Library items in the Main Building to appear on the report, enter “Main Building” in the Home Location **To** and **From** fields, as in Figure 17-10.

Figure 17-10
Collection List
Report

The screenshot shows the 'Collection List Report' dialog box. It features a 'Select Ranges to Narrow List' section with fields for Object ID, Object Name, Collection, Status, and Home Location. The 'Home Location' field has 'Main Building' entered in both the 'From' and 'To' sub-fields. A callout box with an arrow points to these fields, containing the text: 'Enter "Main Building" in both the From and To lines to get just items in the Main Building.' To the right is a 'Sort by:' section with radio buttons for Object ID (selected), Object Name, Condition, Status, Home Location, Collection, and Source. Below this is an 'Include:' section with checkboxes for Archives, Library, Objects, Photos, Include Descriptions, Include Incoming Loaned Items, and Include Items with Status Deaccessioned. At the bottom are buttons for Preview, Print, Export Excel, Browse Data, and Exit.

On the **Collection List Report** screen, you can also include or not include catalogs and items by checking the appropriate boxes. You may include the description of each item by clicking the **Include Descriptions** box. You may select the sort order of the records on the report by choosing a **Sort by** field.

The Report Output Options are the same as they are in the Catalog Detail and Summary reports, as described earlier in this chapter.

RUNNING CONTACTS, DUES & DONATIONS, AND PLEDGE REPORTS

In addition to catalog and collection reports, PastPerfect has numerous reports

for your contacts. These cover membership lists, donations, dues and in-kind gift payments, campaign, prospect and pledge reports, as well as volunteer hour and project reports. Basic contact lists and volunteer reports are found by clicking the **Contacts** button under Report Types. The **Dues & Donations** report type is where you will find the campaign, prospect, donation, dues, in-kind gift and batch processing reports. Pledge reports are found by clicking the **Pledges** button.

Some reports, such as **Donations by Fund or Date Range**, take you to the Pledges & Receipts screen after you click the **Run Selected Report** button. To run the report from the Pledges & Receipts screen, click the **Print Receipts** button under **Donations**.

The screenshot illustrates the process of generating a 'Donations by Fund or Date Range' report. It shows the 'Reports' menu with 'Dues & Donations Reports' selected, the 'Run Selected Report' button, and the 'Pledges & Receipts' screen displaying a table of financial data for FY2008-2009. A dialog box for configuring the report is also shown, with instructions on how to run the report from the Pledges & Receipts screen.

Donations by Fund or Date Range

Select Fund: All

Sort by: Date, ID#, Name, Amount

Date Range: 07/01/2008 thru 06/30/2009

Include Only Donations:

Subtotal by Fund

Buttons: Preview, Print, Export Excel, Browse Data, Exit

Pledges & Receipts

Money Pledged and/or Received in Fiscal Year FY2008-2009

Pledges			Donations			Membership Dues		
Date	From	Amount	Date	From	Amount	Date	From	Amount
01/04/2009	Edwards, Annabeth L.	100.00	02/03/2009	Carter, Rose	1000.00	06/26/2009	Baker, Kate	50.00
01/02/2009	Kittridge, George	10000.00	01/31/2009	Fitzgibbon, Barbara	2200.00	02/21/2009	Carter, Millicent	200.00
11/30/2008	Washington, Alfred	1500.00	01/23/2009	Smithson, Ian	1200.00	02/15/2009	First Interstate Savings and Loan	150.00
			01/15/2009	Tucker, Erwin	50.00	01/20/2009	Kittridge, George	200.00
			01/14/2009	Kittridge, George	5000.00	01/15/2009	Tuck and LouLou Erwin	40.00
			01/14/2009	Jenkins, Laura	250.00	01/15/2009	Capitol Antiques & Appraisal Services	125.00
						01/14/2009	PastPerfect Software Company	200.00
						01/14/2009	Underwood, Theresa	40.00
						09/12/2008	Arte de San Juan	75.00
						08/15/2008	Textile Technology Inc.	150.00

Total Pledges: 11600.00 Total Donations: 12225.00 Total Dues: 1230.00

Figure 17-11 Donations by Fund or Date Range Report

Many reports allow you to specify the ranges of records you want, then run the report immediately. For example, the **Donations, Dues and In-kind Gifts** report gives you options to choose the gift type (donation, dues, or in-kind gift) to include on the report, date range, gifts greater than a specified amount, campaign and campaign activity.

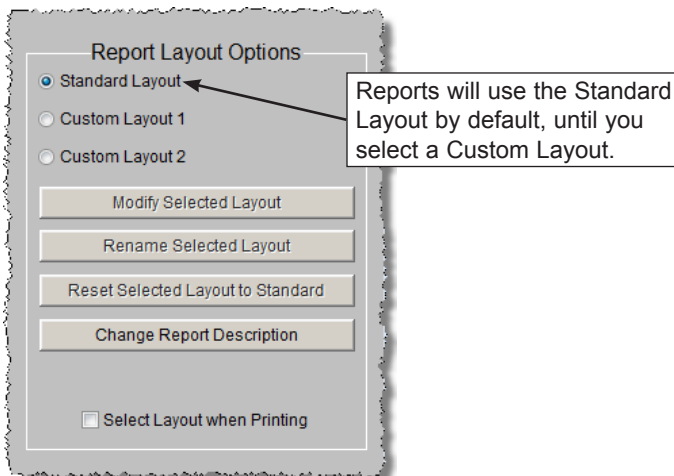
Figure 17-12
Donations, Dues
& In-kind Gifts
Report

After making these selections, you may choose your **Sort by** field to set the order of the records on the report. To see your report, click **Preview**. Clicking the **Print** button will give you the Report Output Options described earlier in this chapter. The **Export Excel** button will export the report information to MS-Excel. You may browse the resulting records in table format by clicking the **Browse Data** button.

REPORT LAYOUT OPTIONS

On the right side of the Reports screen are the **Report Layout Options**, seen in Figure 17-13. Every report, both predefined and Report Maker reports, has three layouts. The Standard Layout is the original layout for the report. There are also two custom layouts that you may modify and rename. By default they are named Custom Layout 1 and Custom Layout 2. Once a custom layout has been modified, you may set the report to use that layout by selecting the radio button next to the custom layout. Please see *Chapter 19 - Advanced Report Modifications*, for instructions on modifying reports.

Figure 17-13
Report Layout
Options



To change the name of a custom layout, click the radio button next to the layout, then click **Rename Selected Layout**. Enter the new name of the report layout, such as “With Subtotals” if you have added subtotals to a report. Press **Enter** on your keyboard to save the new name.

If a custom report layout has been modified and you would like to remove all modifications, select the custom layout and click the **Reset Selected Layout to Standard** button.

The check box at the bottom of this section, **Select Layout when Printing**, gives you the option to choose the Standard Layout, Custom Layout 1 or Custom Layout 2 when previewing or printing a report. This can be useful if you need to switch between using multiple layouts for the same report.

SPECIAL REPORTS

If you need customized special reports, but don't have time to create them with the Report Maker function, you can purchase custom reports designed to your specifications. Please contact the PastPerfect support office for more information. Once created, these custom reports can be accessed by clicking the **Special Reports** button on the Reports screen.