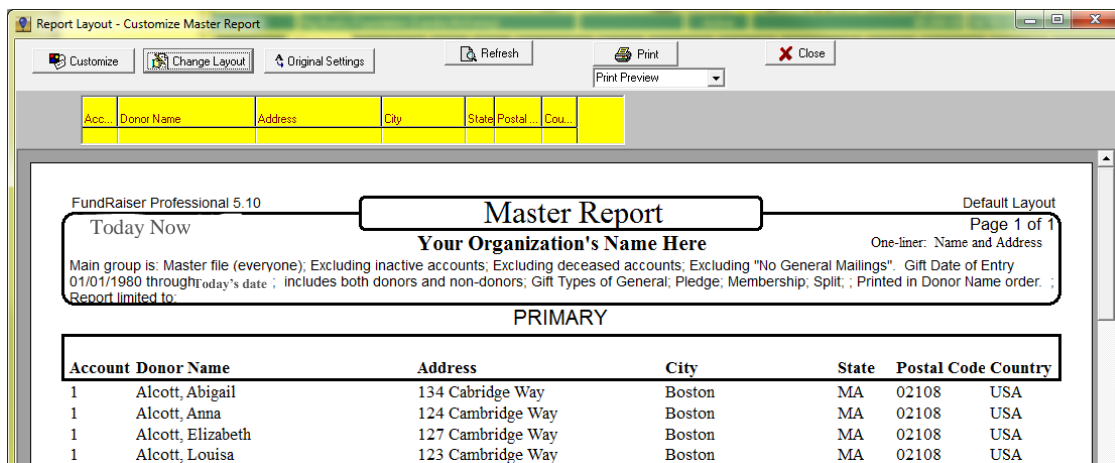# What is the Report Layout Window?

Report Layout is a new window used by the Master, Donor, and Donation reports to give you a great deal of additional control over the layout of these reports.

How to access the Report Layout Window:

To access the new Report Layout window, click on the [Report Layout] button located on the Specifics tab. This will open the Report Layout window with all options available below.
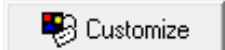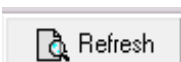
Let's take a look at what is new:

Report Layout - When you open any of the three above-mentioned reports, the Report Layout is the initial window that you will see. It contains the controls for modifying the report in many different ways, including removing and adding columns, changing the colors, and much more.

Note the bright yellow Column Layout Bar above the report. This Column Layout Bar is similar to the one in Simple User Defined Reports. You can move the report columns around and resize columns by dragging them on this bar. You can also add and remove columns (see below).
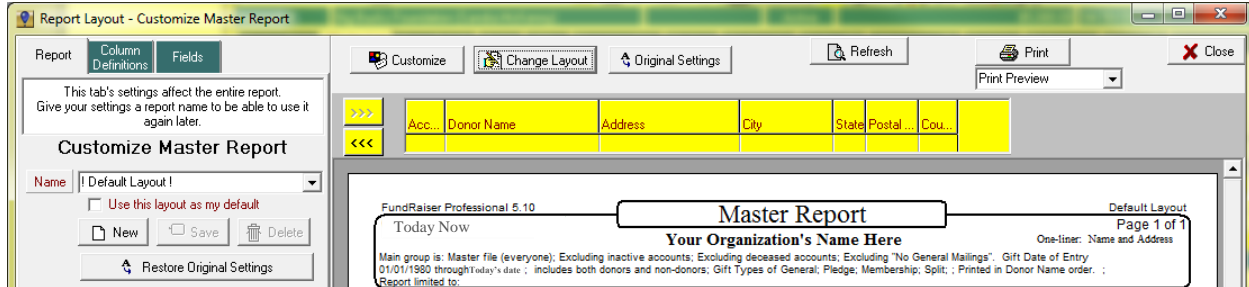
To access the original report window with the familiar Specifics, Who, and Advanced tabs, click the [Customize] button. Here you can do just about everything you could do previously. [Please note that only one of the available Report Variations on the Specifics tab is linked to the Report Layout window. Choosing other variations will cause the Report Layout window to be removed.]
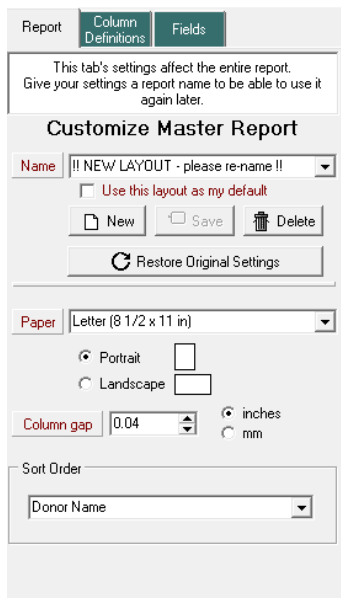
The [Refresh] button refreshes the report preview shown in the bottom of this window. It is needed whenever a change is made that will affect the report.

The [Print] button prints the report (or exports it, depending on the options chosen in the dropdown box beneath it). These are the same options that you are used to, such as exporting in Excel and PDF formats.

The button exposes two new buttons ( ) and three tabs on the left (clicking it again hides them):

The <u>Report</u> tab is where you will name and save customizations, change paper size and orientation, sort order, and other report-level settings.
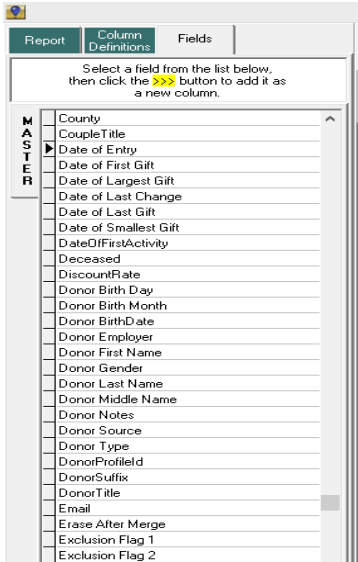

The <u>Column Definitions</u> tab enables you to edit the details for each of the report columns, including fonts, colors, and renaming of column headings. To change to a different column, click the desired column in the heading row of the Column Layout Bar.

On this tab, you can also add additional rows to the column by clicking the green + (plus sign) button. You will be directed to double-click a field on the Fields tab to add it as a new field to the column. There is no limit to the number of additional field-rows you can add per column. You can also move fields up and down and delete them. The rows you add will appear as additional lines for each person or donation displayed, with the number of columns remaining the same.

If you find that the additional columns make the report difficult to read, the option to adjust the font color and size is on the <u>Column Definitions tab</u>, or you may use the green "+" on that tab to create the field as an additional row within an existing column. You can also change the orientation from portrait to landscape, or change the paper size on the <u>Report</u> tab.

The <u>Fields </u>tab is where you can choose additional columns to add to the report. It operates similar to the merge field window in the Word Processor, where you choose a tab (aligned on the left in this case) and then add the field you would like. To add a field to the Column Layout Bar, click the >>> button, and then drag the column on the Column Layout Bar to the desired position. You may need to adjust the size of the column depending on the chosen field.

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