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Reports in Reunion

Part 2: Report Layouts

by [Jan McClintock](#)

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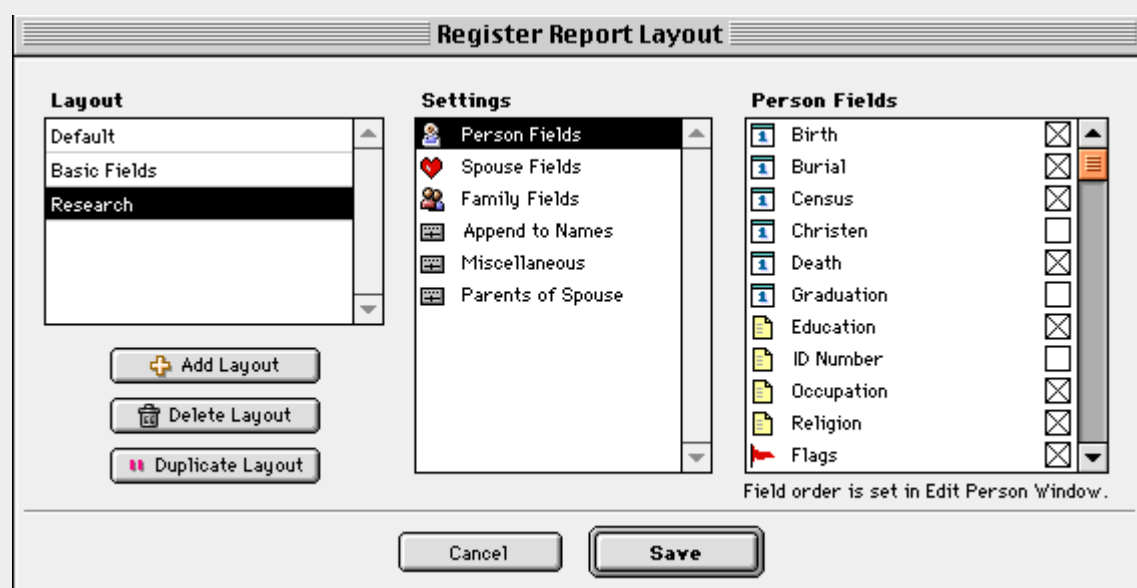
Now that you have set up some Report Options, let's talk about the next step in creating custom reports using Reunion: Report Layouts. [This applies to text reports, not to charts.] Using Layouts is an easy way to create different reports from the same family file based on the purpose of the report.

A **Report Layout** is like any kind of publishing layout--it determines what data is included in your report and how that data looks. For instance, the page layout of a glossy magazine is way different than that of a daily newspaper, and way more different than that of a church program; each one contains different data which is positioned differently on the page.

IMPORTANT: For each type of report you create in Reunion (Family Group, Register, Ahnentafel, etc.), you must define a separate layout, or set of layouts. For instance, my layouts for Family History Reports are different than those for my Person Sheets. The reason? These reports can be vastly different in their content and intended use.

It's difficult to describe Layouts without opening a Layout window and clicking on some options. Choose **Create -> [any type of report]**, then choose **Layout -> Define Layouts**. There are three panes in a Layout window:

1. Layouts - the names of the different sets of options
2. Settings - the groups of different fields or formats
3. Fields and Options - checkboxes for including, excluding, or formatting data



Layouts

Here is where you create new layouts and modify existing ones. Click on the **Default** layout to select it, and its **Settings** and applicable **Fields** will appear to the right. The fields listed are those that **you** are using in your family file, so they'll be different than mine. You may even have two family files that contain vastly different fields; for example, one family file might contain LDS sealings and ordination fields, while the other might include Hebrew dates and Bar/Bat Mitzvah events. This, of course, is all based on your particular family and the data you have gathered.

To create a new layout, click the **Add Layout** button, and type in the name for your layout. Make it something obvious, so you'll recognize it next time you choose a layout.

Here are three of my own layouts for both Family Group Sheets and Family History Reports:

- Basics Only - includes birth, marriage, and death data along with miscellaneous notes
- Research - includes all fields, plus ages, relationship, and User ID; this is for my own use during research trips
- Sharing - a combination of the first two, with fields like religion, occupation, burial, and ages; basically, the information in which other family members might be interested

Layouts can be renamed and duplicated, too. After I created my Research Layout, I duplicated it, renamed the copy "Sharing" Then I deleted some fields that I use just for research, like my "Research Notes" and "Census" fields. The end result was a pared-down version of the original Research Layout.

Of course, you can edit your report layouts anytime you want. In the Layout window, your choices to exit are **Cancel** and **Save**. If you make any changes to a layout, you will have to Save it to be able to use it. The reason I'm stating the obvious is to reinforce the use of multiple Layouts -- if you want to change one, duplicate it first and change the copy. That way, your original is still available. The number of Layouts you can create and save is unlimited, as long as you can tell them apart!

Settings

The list of Settings in the Report Layout window will be slightly different for each type of report. For instance, the settings list for a Family Group Layout is the only one that includes Children Fields. You cannot change the list of Settings themselves, but clicking on them shows you their options in the right-hand pane.

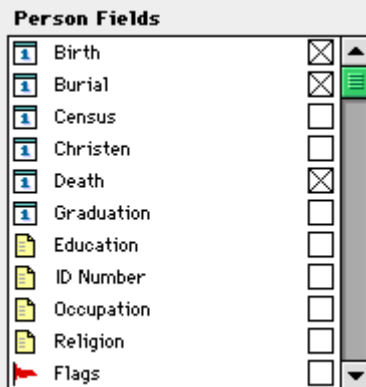
The most common settings, Person/Spouse/Children Fields, Family Fields, Append to Names, Event Format, and Sorting Fields, as described in the electronic manual [**Help -> Search for Help, "report fields"**]. Settings which are specific to only one type of report are described in that report's own chapter. For instance, the layout window for Family History reports contains a setting called Generation Prefix. The electronic manual has

the description for this setting which explains why you might want to use it. [[Help -> Search for Help, "layout generation prefix"](#)]

Fields and Options

The right-hand pane in the Layout window is where you choose the fields (depending on the Setting) to be included in the report, and where you set other layout options.

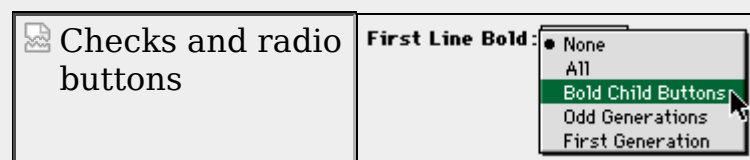
The **fields** that are listed here are the same fields (and no others) that you are currently using in your family file. In other words, if a field is not a default one, and you haven't added or defined it, then it won't be listed here. Here's an example:



These fields are the Person Fields that I am using in this family file. The list includes all the Person Event, Fact, Note, and Flag fields that I use (I scroll down to see the entire list), as well as fields from the Address feature in Reunion: Address, Phone/FAX, e-mail, and Web Page. No other fields are listed -- I don't use the Nickname Person Field (a fact field), for instance, so it is not listed here.

By checking a box, you are telling Reunion that you wish to include this field and its data in this report. By leaving the box blank, you are telling Reunion NOT to include this field.

By choosing an **Option** Setting, like **Field Format**, a series of checkboxes, pop-up menus, and/or buttons are listed.



These options are, again, based on the type of report, and may be explained in that report's own chapter in the electronic manual. [[Help -> Contents -> Creating Comprehensive Reports](#)]

Saving Layouts

After you have changed, renamed, or added a Layout and have chosen the fields and options for each setting, click the **Save** button to return to the Create Report window. Now, use the **Layout** pop-up menu to choose which layout you want to use for this particular report. When you create

reports of this same type in the future, your layout choices will be available via this pop-up menu.

Remember that each type of report has separate layouts, so a layout that you created for a Descendant Report and named "Long Form," for example, will not be available if you create a Family Group Sheet (unless, of course, you've created another Layout called "Long Form" specifically for Family Group Sheets).



Choices

Finally, be sure that the layout you create is applicable to the report you need. For instance, if you are creating a Family Group report for a distant relative, you probably do not have to include every field and piece of data in your family file. If you are creating a Register report for a family history book, there still may be fields you do not wish to include, perhaps those that you use for research or notes to yourself. The ability to create different Layouts can be a very handy way to "customize" reports based on their intended recipient and use.

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e-mail: info@LeisterPro.com

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