

# Public-Private Dialogue

## The PPD Reform Tracking Tool

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Design layouts in *Layout mode*. You can include any combination of fields, text, and graphics on a layout. You can change the font and color of fields and text and you can change the way data appears in Number or Date fields. For example, you can set a Number field to include currency notation or you can set a Date field to include the day of the week with the month, day, and year.

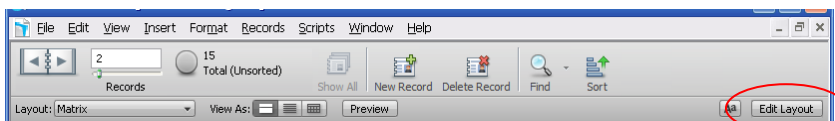
Changes you make in Layout mode affect only the way data appears. The data itself remains as it was entered.

The existing layouts were designed according to a needs assessment but you may think that they are to be customized to your local needs. This section expounds how to do it.

#### ***Resize, move, and add a field***

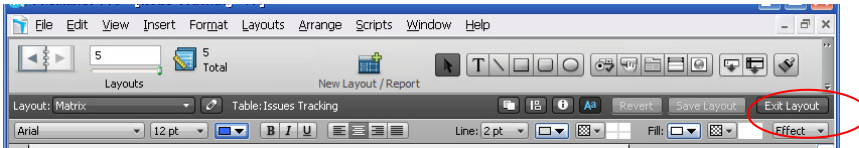
##### ***Select and resize a field***

1. Choose View menu > Layout Mode or click on the edit layout button on the right of the window:



2. In Layout mode, click the field to customize, to select it.

3. Drag the handle at the lower-right corner of the field to the left until the field is smaller, yet large enough to display the longest data you expect in your file.



4. Click Save to save changes to this layout, if prompted.

FileMaker Pro can save layout changes automatically, or prompt you to save changes before leaving Layout mode. To save layout changes automatically, select the Save layout changes automatically checkbox in the Save changes to this layout dialog box.

5. Choose View menu > Browse Mode or exit layout: In Browse mode, flip through the records.

If the field doesn't display all names completely, return to Layout mode and make the field larger.

### **Move a field**

1. Choose View menu > Layout Mode or click on the edit layout button on the right of the window:

2. Click inside a field and drag it beside another field

In the next steps, you'll align these fields.

3. Press Shift and click both fields to add it to your selection. Both fields are selected.

4. Choose Arrange menu > Align > Top Edges.

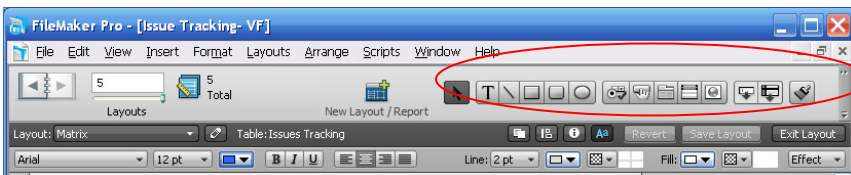
Fields move until they are aligned at the top

### **Add a field and choose its format**

If a field has been defined in a table, you can display it on any layout based on that table. Here the table is called "Issue Filing".

1. Choose View menu > Layout Mode.

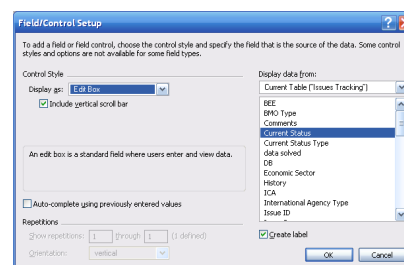
2. Using the Field tool, drag the field to layout and on the layout drag from the top left corner to the bottom right corner,



3. In the Field/Control Set-up dialog box, in the "display data from" drop down list select the needed field, then click OK.

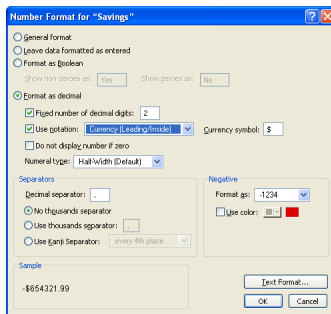
The new field appears on the layout.

4. Resize the new field by dragging a right handle so the field is the same size as the others



5. Right click on the field to arrange the format
6. Select Size, Style, and Color in the text format
7. You can also change the fill color, pattern or the pen color or pattern

## Display a number as currency



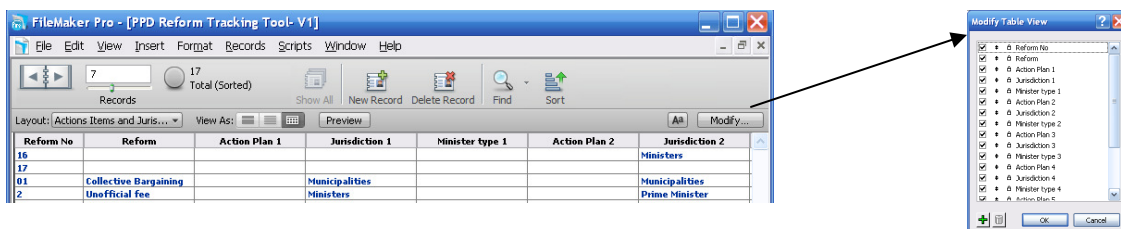
You can display a number as currency, even though only the number is typed into the field. Formatting affects only the way data is displayed. It does not change the data.

1. Choose View menu > Layout Mode.
2. Select a quantitative field.
3. Choose Format menu > Number
4. Select options in the following Number Format dialog box as shown
5. Click OK.

## Modify the order of columns in Table View.

The table view design can not be modified. It retrieves the font and colors of the fields of form view. The only option given in table view is to modify the order of column and to make fields appear or disappear.

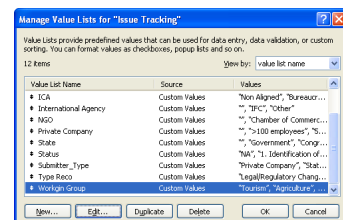
This can be done in browse mode by clicking on the “Modify button”



Click on the double arrow to modify the order of columns. Uncheck the boxes to make some fields disappear.

## Changing the Value Lists of the Pre-Defined Fields

Value lists let you choose the value you want from a scrolling list, a pop-up menu, checkboxes, or radio buttons. The lists Working Group, Reform Process Status, Type of current status contain predefined values but they are to be changed to correspond to the local context.



1. Choose Issue Filing from the Layout pop-up menu if it is not already selected.

2. Choose File menu > Manage > Value Lists.

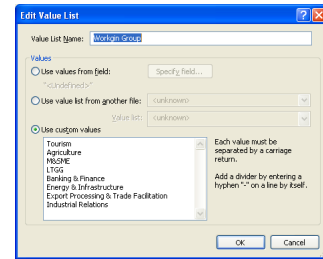
You can also click on the “Manage icon” of the layout mode on top of the exit layout button

3. Click on one of the Value List that you want to change.

4. Click Edit

5. Click in the large box and change the values for this list, by typing each value on its own line.

6. Click OK to finish



### ***Assign a value list to a field and display it as radio buttons for example***

You can also decide to assign value lists to other fields or change the type of button

1. Choose View menu > Layout Mode.

2. Select the Issue Filing Layout, if it is not already displayed.

3. Select the Economic Sector field.

4. Choose Format menu > Field/Control > Setup or Right Click and choose Field/Control > Setup

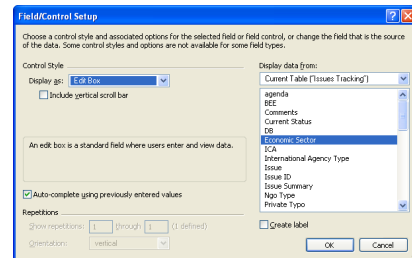
5. For Display as, choose Radio Button Set for example

6. For Display values from, choose Manage Value Lists...

7. Click New

7. Give a name and custom values

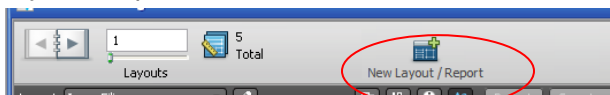
9. Click OK



### ***Creating New Reports beside the Existing ones***

You may want to create new reports that are not predefined and in particular “subsummary” reports. *Subsummary reports*, also referred to as *reports with grouped data*, categorize information by a particular field or fields, allowing you to group information hierarchically. This subsummarized information can then be subtotaled, averaged, or counted.

1. In Layout mode, choose Layouts menu > New Layout/Report or click on the icon New layout/ report on the status tool bar.

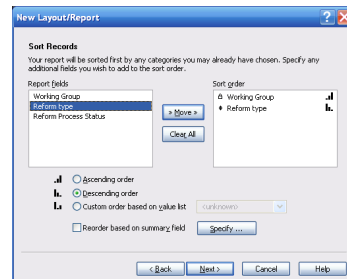


2. Type a Layout Name and select the list/report layout type
3. Select Report with grouped data, and click Next.
4. Select the fields to be used in this report and move it to the Layout fields list.

For example, working group, reform type, reform status

6. Click Next
7. Move the field according to which the Report categories list will be organized. Working group for example
8. Click Next

9. You can move a second field to order the records in the Sort Record step, but this is optional. In this same window, you define the sorting order type as well: ascending, descending, customized based on value list or summary field (see below for summary field definition)



10. Click Next
11. Select a theme and create the header and footer.
12. Create a script to run the report if desired
13. Click View the report in Preview mode if it is not already selected.
14. Click Finish.

## ***Generate a report with grouped data and totals***

Previously we saw how to create a report that grouped data in categories based on common field values. It is also possible to create a similar report that also includes subtotals for each category and a grand total for the entire report.

You may want to know for example the costs or savings for proposed recommendations by working group. A report with grouped data and totals requires the same elements as a report with grouped data: a sub-summary part in the report layout for each category, a field or fields to group records by, and a sort of the database by these fields.

1. Repeat step 1,2,3 of former paragraph
4. Select Report with grouped data and then select Include subtotals and Include grand totals.
5. Click Next
6. Select the fields to be used in this report such as for example Working Group and Savings/Costs and click Next
7. Select the field by which you want to summarize data such as Working Group and click next
8. Select the fields for the Sorting Records if any, pick up the sorting order type and Next
9. In the “Specify subtotals” step, you have to pick the quantitative field that will be the basis for the subtotals. These fields are called “summary fields”. In this example you can only pick up total costs or/and total savings.

Note: These fields are the only ones available because they have been specified as

“summary field”. They have to be specified as so to be used as subtotals and grand totals. A *summary field* is a type of field you can specify when you define fields. Summary fields allow calculations across all of the records in your found set. In general, when you need to total data across a number of records, you must use a summary field. In File>Manage>Database, a summary field that totals the costs and savings entered in the corresponding field can be created.

Here, we suggest a report based on subtotals for cost or savings or potential ones by working group and to see a grand total of both types’ economic impacts at the end of the report.

**10.** For Category to summarize by, use Working Group

**11.** For Subtotal placement, use the default value of Below record group.

**12.** Click Add Subtotal to add the Current Status Type field as the subtotal. This tells FileMaker Pro to create a subtotal of Costs or Savings that are beneath each current status step.

**13.** Click Next

**14.** In the “specify grand total step”, for Summary field, click Specify and select Total savings or/and costs from the list of available fields, then click OK.

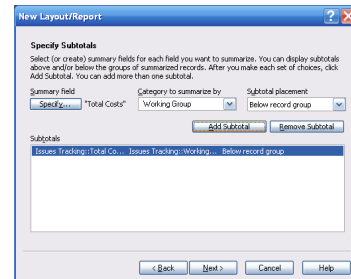
**15.** Click Add Grand Total to add the Total Costs or Savings as the grand total at the end of the report. This tells FileMaker Pro to create a grand total of costs or savings

**16.** Click Next

**17.** Select a Theme for the layout design and create headers and footers

**18.** Create a Script if desired.

**19.** Go to layout mode, to modify the design



**INote:** Reports with grouped data are interesting to see on List View and Table view  
**IMPORTANT:** In list view, the data will appear correctly only if you sorted the records according to the grouping category first ( working group).