

Michael C. - 2021-03-23 - Reports

- Note:** No template should have been selected and the **Preview** link should be empty (no reports created).

2. Click the **Add** button to setup your report. Consider this step as starting from scratch.

List of Members
This displays a list of members with information

3. This will now let you edit the section.

- **Section Name:** Type in title for the section you are adding.
- **Data Source:** This option allows you to select the type of information.
- **Section Repeat:** Uses the space on the page by having additional information repeat to the right of the current list. The following Diagram shows the Double and Triple Section Repeat layout.

- Add Template

Add

Preview

Action

Section Name

New Section

Data Source

Active Members

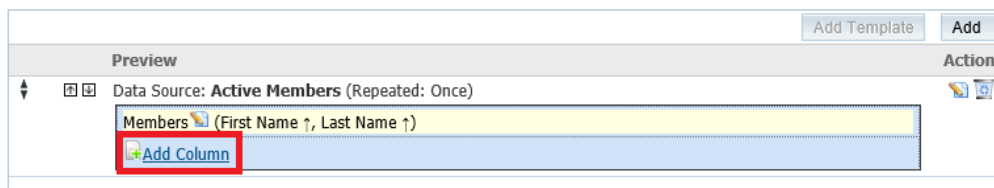
Section Repeat

Single

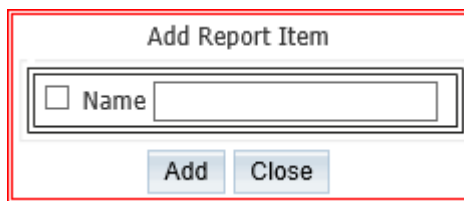
Update

Cancel

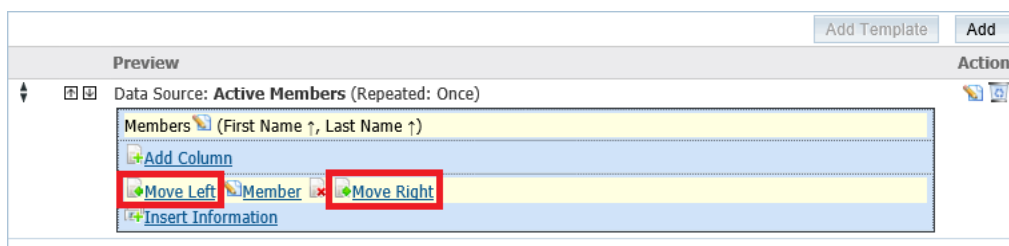
5. **Add Column:** This tool allows you to create separate columns to divide your report into separate sections. This works very similar to an Excel spreadsheet.



6. When you click **Add Column**, the **Add Report Item** window opens. Click on the check box next to **Name** to have a title shown at the top of the column (Title of your list) and then type out the name of the column. Finally, click the **Add** button when you're ready to add the column.



7. When adding a column to the report, the item will always appear in separate box split by a line to right. To adjust column order from left to right use the **Move Left** and **Move Right** links.



8. Click **Insert Information** - The insert information link provides the ability to select information from ClubRunner. Within the Insert Information window, the following options are available:
- **Add on new line:** Gives you the ability to move the information to the next line (Below the last added info).
 - **Prefix:** Text you wish to appear before the information (Example: "First Name")
 - **Source:** This is the information from the database; this function can grab information from many places in ClubRunner. The chart on the next page shows the source and the fields available.
 - **Postfix:** Text you wish to appear after the information
 - **Format:** Allows you to apply formatting to bold, underline and/or italicize the font.
9. Using these options, select and enter information you want added to the report. Once all changes have been applied, click the **Add** button.

Add Report Item

☐ Add on new line

Prefix Source City Postfix

Font

Format **B** *I* U

Add

10. Once added, you are more than welcome to delete or edit the information added. To edit, click the words that appear in the box. To delete, click the button.

Add Template **Add**

Preview **Action**

⬆ ⬇ Data Source: **Active Members** (Repeated: Once)

Members (First Name ↑, Last Name ↑)
Add Column
Move Left Member Move Right
Insert Information
First Name First Name ✕

11. To move the data/field to a different location on the report click on the **edit icon** on the right beside the trashcan.

Add Template **Add**

Preview **Action**

⬆ ⬇ Data Source: **Active Members** (Repeated: Twice)

New Section (Last Name ↑, First Name ↑)
Add Column
Move Left Members Move Right
Insert Information
Last Name, ✕ First Name ✕ "Nickname" ✕ [Partner First Name] ✕
Preferred Address 1 ✕
Preferred Address2 ✕
Preferred City, ✕ Preferred State ✕ Preferred Zip ✕
Primary Email ✕
Work: Business Phone ✕
Home: Home Phone ✕
Mobile: Mobile Phone ✕

12. This takes you to the **Report Section Designer**. Click on the **edit icon** on the right.

Report Section Designer

Select Section Data Source

Active Members

Club

Custom Fields

Label

Membership

Section Settings

Select the checkbox below if you would like the Section Name to appear above your data.
☐ Name New Section

Section Repeat Double

Update

Groupings allow you to create multi-tiered reports where you can show data related to one source within data from another source. e.g. Display all members within all clubs in a district, grouped by club.

Add Group

Name	Data Source	Preview	Action
No Grouping			

Name	Section Item Preview	Action
Default Layout	<div>Members</div> <div>Last Name, First Name "Nickname" [Partner First Name]</div> <div>Preferred Address 1</div> <div>Preferred Address2</div> <div>Preferred City, Preferred State Preferred Zip</div> <div>Primary Email</div> <div>Work: Business Phone</div> <div>Home: Home Phone</div> <div>Mobile: Mobile Phone</div>	

Column #2

 |



13. This will take you into the **Section Item Designer**. From here you can sort, delete, or edit a column. Click on the **edit icon** on the right beside the trashcan for the column you want to change.

Section Item Designer

Sorting

Reset To Default

Add Sorting Field

Sorting Field	Z → A	Action
Last Name	No	
First Name	No	

Preview

Members

Last Name, First Name "Nickname" [Partner First Name]

Preferred Address 1

Preferred Address2

Preferred City, Preferred State Preferred Zip

Primary Email

Work: Business Phone

Home: Home Phone

Mobile: Mobile Phone

Column #2

Section Item Preview

Members

Last Name, First Name "Nickname" [Partner First Name]

Preferred Address 1

Preferred Address2

Preferred City, Preferred State Preferred Zip

Primary Email

Work: Business Phone

Home: Home Phone

Mobile: Mobile Phone

Column #2

14. This will take you to the **Column Designer** page. Click on the up or down arrows to move the data/field up or down. Once done, you can click on the **Go Back** button near the bottom of the page.

Column Designer



























Column Settings

Select the checkbox below if you would like the Column Name to appear above your data.

☐ Name x

Horizontal Align

Vertical Align

						<input type="button" value="Add"/>
		New Line Prefix	Value	Postfix	Custom Format	Action
↑↓	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	False	Last Name	,	10 Color [Black]	 
↑↓	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	False	First Name		10 Color [Black]	 
↑↓	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	False	" Nickname "		10 Color [Black]	 
↑↓	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	False	[Partner First Name]		10 Color [Black]	 
↑↓	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	True	Preferred Address 1		10 Color [Black]	 
↑↓	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	True	Preferred Address2		10 Color [Black]	 
↑↓	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	True	Preferred City	,	10 Color [Black]	 
↑↓	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	False	Preferred State		10 Color [Black]	 
↑↓	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	False	Preferred Zip		10 Color [Black]	 
↑↓	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	True	Primary Email		10 Color [Black]	 
↑↓	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	True	Work: Business Phone		10 Color [Black]	 
↑↓	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	True	Home: Home Phone		10 Color [Black]	 
↑↓	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	True	Mobile: Mobile Phone		10 Color [Black]	 

Column Preview

Members

Last Name, First Name "Nickname" [Partner First Name]

Preferred Address 1

Preferred Address2

Preferred City, Preferred State Preferred Zip

Primary Email

Work: Business Phone

Home: Home Phone

Mobile: Mobile Phone

Next: How to Generate a Custom/Template eDirectory 2.0 Report using the eDirectory Builder >

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