ClubRunner

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How do I customize a template report?

Michael C. - 2021-03-23 - Reports

4. Building and Customizing Your Report

Once you have saved your report, it is time to begin building and customizing your report.

1. Click on the Edit Content link to the right of the report you to edit it.

Custom Reports (Optional)	Add
Name	Action
Club	
List of Members	🔊 🧕 Edit Content Preview
This displays a list of members with information	Modified: Sep 22 2016

 Once the page has loaded up, the report designer window will appear. The Report Content Designer will load up the report information onto the page, because you selected a template to work from. Please refer to the screen shot below:



3. Clicking on **Add Column** allows you to create separate columns to divide your report. This works very similar to an Excel spreadsheet.

		Add Template	Add
		Preview	Action
÷	^ ↓	Data Source: Active Members (Repeated: Twice)	1
		New Section 🔊 (Last Name ↑, First Name ↑)	
		Add Column	
		▶ Move Left [™] Members ▶ ▶ ▶ Move Right	
		The 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 🙀	

4. When you click on Add Column, you will notice 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.

Add Report Item
Name
Add Close

 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.

			Add Template	Add
		Preview		Action
÷	↑ ↓	Data Source: Active Members (Repeated: Twice)		8
		New Section 🐿 (Last Name ↑, First Name ↑)		
		₽ <mark>Add Column</mark>		
		Move Left Members 🐱 Move Right 🛛 Move Left Column #2	Move Right	
		IF# <u>Insert Information</u>		
		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 📴		

6. The **insert information** link provides the ability to select information from ClubRunner.

			Add Template	Add		
		Preview		Actio		
ŧ	↑ ↓	Data Source: Active Members (Repeated: Twice)		S 👔		
		New Section 🐿 (Last Name ↑, First Name ↑)				
		Add Column				
		Move Left Members 💀 Move Right	▶ <u>Move Left</u> <u>Column #2</u>			
		Insert Information	4 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 💷				

- 7. Within the **Add Report Item** 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.
 - $\circ~$ **Postfix**: Text you wish to appear after the information.
 - **Format:** Allows you to apply formatting to bold, underline and/or italicize the font.
- Using these options, select and enter information you want added to the report.
 Once all changes have been applied, simply click the Add button.

		Add Report Item	
Add on new line			
Prefix	Source Club	✓ City	✓ Postfix
Font 10 V Black	~		
Format B	ū		
		Add Close	

- 9. Once added, you can delete or edit the information added. To edit, click the words that appear in the box. To delete, click the red X icon.
- 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		Acti
ŧ	$\uparrow \downarrow$	Data Source: Active Members (Repeated: Twice)		1
		New Section 🐿 (Last Name ↑, First Name ↑)		
		Add Column		
		▶ <u>Move Left ऒMembers</u> 😺 ▶ <u>Move Right</u>	Move Left SColumn #2 😺 Move Right	
		Insert Information	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 🙀		

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

Select Section Data Source Active Members Club Custom Fields Label Membership	Name New Section Repeat Update	kbox below if you would like w Section Double V	the Section Name to appear above y		
			ports where you can show data rela mbers within all clubs in a district, g		within
				Ade	d Group
	Name	Data Source	Preview		Action
	No Grouping				
	Name	Section Item Preview			Action
	Default Layout	Members Last Name, First Name "Nii Preferred Address 1 Preferred Address2 Preferred City, Preferred St Primary Email Work: Business Phone Home: Home Phone Mobile: Mobile Phone	ckname" [Partner First Name] ate Preferred Zip	Column #2	

12. 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.

Report Section Designer

Section Item Designer

Contine	
Sorting	

		Reset	To Default	Add Sorting Field
Sorting Fie	Id	$Z\toA$		Action
Name	1	No		S 2
First Name	2	No		S 🖸

			Add
		Preview	Actio
÷	•	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	
ŧ	₩ ₽	Column #2	
Sectio	n Item I	Preview	
Mem	bers		Column #2
Prefe Prefe Prefe Prim Worl Hom	erred Ad erred Ad erred Cit ary Ema k: Busine k: Busine	dress2 y, Preferred State Preferred Zip il ess Phone	

13. 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 Members
Horizontal Align Default 🗸
Vertical Align Default 🗸
Update

							Add
		New Line	Prefix	Value	Postfix	Custom Format	Actio
ŧ	শ⊎	False		Last Name	,	10 Color [Black]	%]
ŧ		False		First Name		10 Color [Black]	%] []
ŧ	শ⊎	False		Nickname	п	10 Color [Black]	S
÷	শ⊎	False	[Partner First Name]	10 Color [Black]	S
ŧ	.↑ ↓	True		Preferred Address 1		10 Color [Black]	S
ŧ	শ⊎	True		Preferred Address2		10 Color [Black]	S
ŧ	^ ₽	True		Preferred City	,	10 Color [Black]	S
ŧ	∱ ₽	False		Preferred State		10 Color [Black]	S 🔽
÷	শ⊎	False		Preferred Zip		10 Color [Black]	S 🔽
•	↑ ₽	True		Primary Email		10 Color [Black]	%]
ŧ	শ⊎	True	Work:	Business Phone		10 Color [Black]	S 2
ŧ	^ ₽	True	Home:	Home Phone		10 Color [Black]	S 🔽
ŧ	↑ ₩	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

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