

How do I setup a custom report with the eDirectory builder?

Michael C. - 2021-03-23 - [Reports](#)

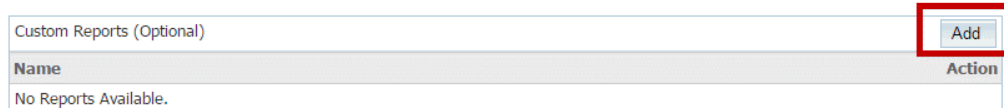
Setting Up Your Custom Report

This Article will explain how to create custom reports.

1. To create a new report, first click on the **Add** button on the right.

eDirectory Builder

Welcome to the Dynamic eDirectory Report Generator! This module allows you to create multiple reports and design everything from the layout, sections, data sources, and fields. To create a new report, click on the Add button. Once you have named your report, begin your design by clicking on the 'Edit Content' link on the right. This will allow you to begin adding multiple sections, each of which can have a designated data source. For more help and guidance, please visit the [ClubRunner Support Centre](#).

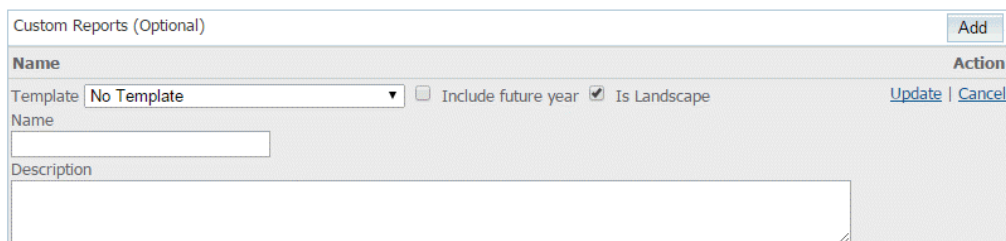


Custom Reports (Optional)

Name	Action
No Reports Available.	

The 'Add' button is highlighted with a red box.

2. The page will open up a box with several options to help build your report.



Custom Reports (Optional)

Add

Name **Action**

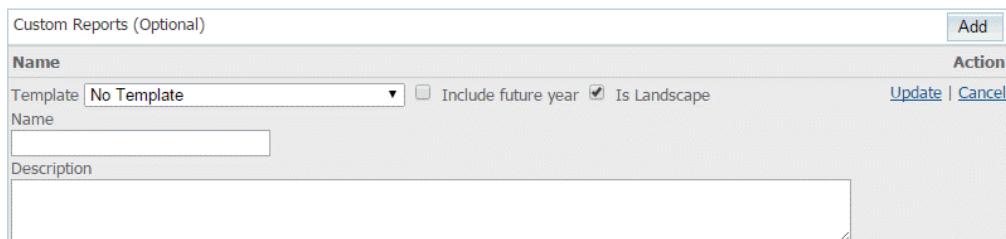
Template: ☐ Include future year ☒ Is Landscape [Update](#) [Cancel](#)

Name:

Description:

3. **Template** provides you with the ability to customize a report that was created by ClubRunner. All templates can be modified with additional information, with the added ability to change the existing information as well.

Note: All report templates can be previewed by clicking the **Reports** tab on the grey menu bar near the top and then selecting on eDirectory Reports 2.0



Custom Reports (Optional)

Add

Name **Action**

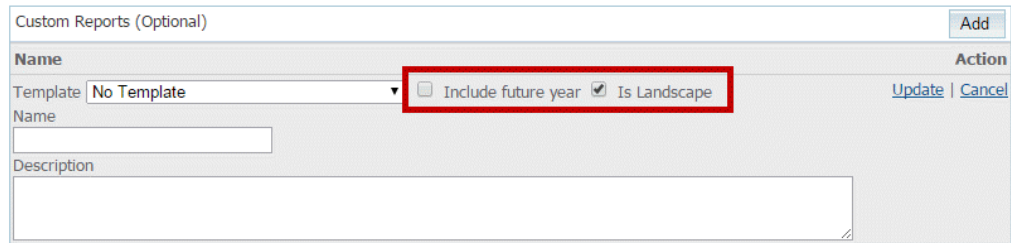
Template: ☐ Include future year ☒ Is Landscape [Update](#) [Cancel](#)

Name:

Description:

4. The **Include Future Year** option is used to create a separate report for the future year. The **Is**

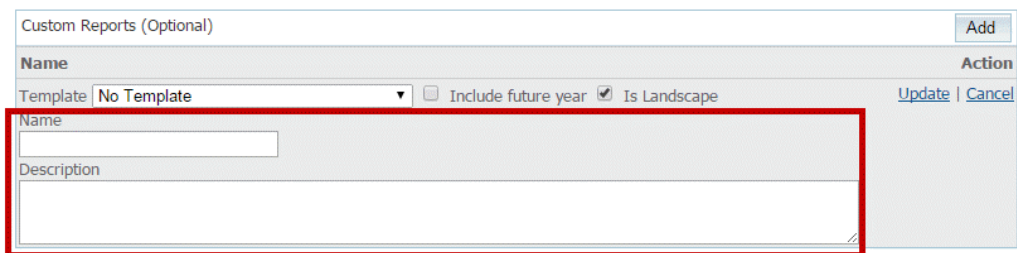
Landscape option sets your page layout option to landscape.



Custom Reports (Optional) Add

Name	Action
Template: No Template Name: <input type="text"/> Description: <input type="text"/>	<input type="checkbox"/> Include future year <input checked="" type="checkbox"/> Is Landscape Update Cancel

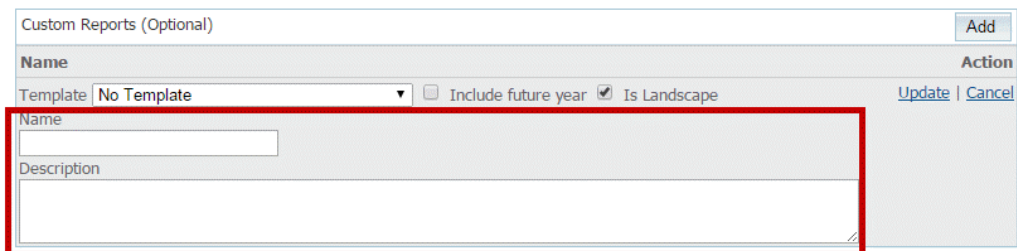
5. The **Name** field provides a title to your report, while you can use the Description field to write a brief summary of the information it contains. Report descriptions will appear in the eDirectory Reports 2.0 list.



Custom Reports (Optional) Add

Name	Action
Template: No Template Name: <input type="text"/> Description: <input type="text"/>	<input type="checkbox"/> Include future year <input checked="" type="checkbox"/> Is Landscape Update Cancel

6. Once you have filled in these options, click the **Update** link to save your changes.



Custom Reports (Optional) Add

Name	Action
Template: No Template Name: <input type="text"/> Description: <input type="text"/>	<input type="checkbox"/> Include future year <input checked="" type="checkbox"/> Is Landscape Update Cancel

[Next: How to customize a template report >](#)

OR

[Next: How to build a report without a template >](#)

Related Content

- [How do I generate an eDirectory report?](#)
- [How do I customize a template report?](#)
- [How do I build a report without a template using the eDirectory report builder?](#)
- [How do I access the eDirectory builder?](#)
- [How do I download Word & PDF reports using eDirectory Reports?](#)