

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

Michael C. - 2021-03-23 - Reports

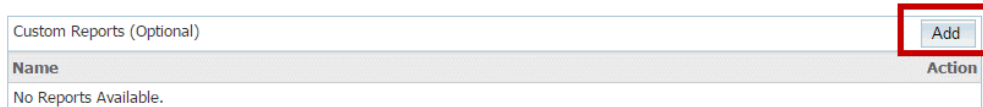
Setting Up Your Custom Report

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

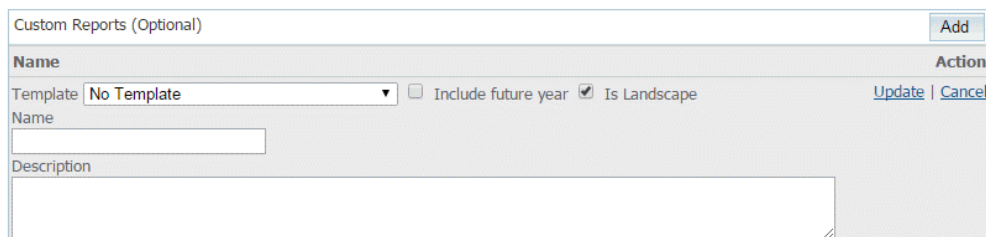
Welcome to the Dynamic eDirectory Report Generator! This module allows you to create multiple reports and design everything from the layout, sections, data sources, and fields. To create a new report, click on the Add button. Once you have named your report, begin your design by clicking on the 'Edit 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.	Add

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

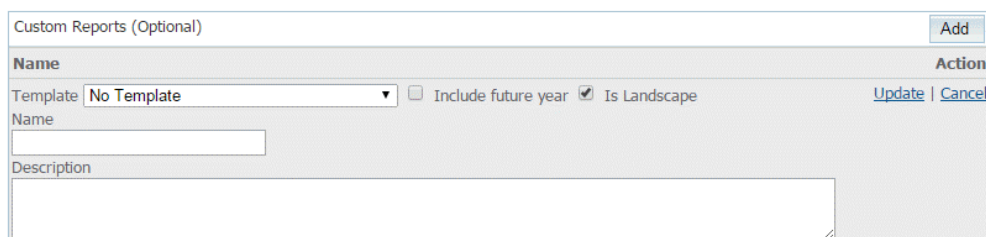


Custom Reports (Optional)

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

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)

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

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 ☐ Include future year ☒ Is Landscape Update | Cancel

Name

Description

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 ☐ Include future year ☒ Is Landscape Update | Cancel

Name

Description

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 ☐ Include future year ☒ Is Landscape Update | Cancel

Name

Description

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

or

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

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- [How do I customize a template report?](#)
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- [How do I access the eDirectory builder?](#)
- [How do I download Word & PDF reports using eDirectory Reports?](#)