

ClubRunner


Help Articles > Club Help > Club - Administration Guide > Reports > How do I build a report without a template using the eDirectory report builder?

How do I build a report without a template using the eDirectory report builder?

Michael C. - 2021-03-23 - Reports

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

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

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

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

Report Content Designer

List of Members
This displays a list of members with information

DATE/TIME

Preview		Add Template	Add
Preview		Action	
No Sections			

Page X of Y

3. This will now let you edit the section.

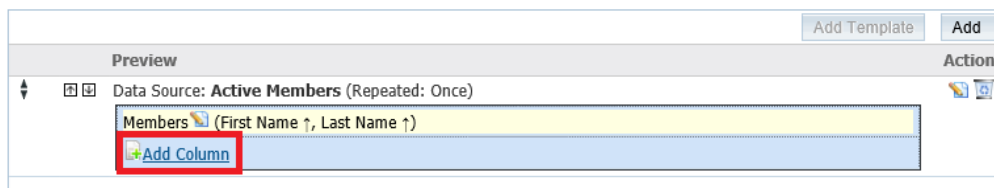
Note: You may not find all the information you are looking for from a certain data source.

- o **Section Name:** Type in title for the section you are adding.
- o **Data Source:** This option allows you to select the type of information.
- o **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.

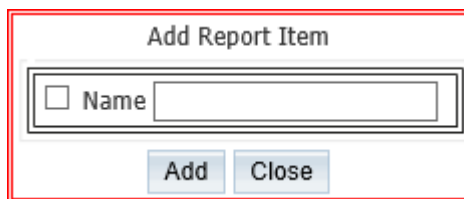
4. Once your options have been selected, click the **update** link. You can now begin to add your columns and information.

Preview		Add Template	Add
Preview		Action	
Section Name	<input type="text" value="New Section"/>	Data Source	<input type="text" value="Active Members"/>
	<input type="text" value="Single"/>	Section Repeat	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 Club City Postfix

Font 10 Black

Format **B** *I* U

Add Close

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](#) [↶ Move Left](#) Column #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 ✖

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

Section Repeat

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.





Name	Data Source	Preview	Action
No Grouping			

Name	Section Item Preview	Action																		
Default Layout	<table border="1"><thead><tr><th>Members</th><th>Column #2</th></tr></thead><tbody><tr><td colspan="2">Last Name, First Name "Nickname" [Partner First Name]</td></tr><tr><td colspan="2">Preferred Address 1</td></tr><tr><td colspan="2">Preferred Address2</td></tr><tr><td colspan="2">Preferred City, Preferred State Preferred Zip</td></tr><tr><td colspan="2">Primary Email</td></tr><tr><td colspan="2">Work: Business Phone</td></tr><tr><td colspan="2">Home: Home Phone</td></tr><tr><td colspan="2">Mobile: Mobile Phone</td></tr></tbody></table>	Members	Column #2	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		
Members	Column #2																			
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																				



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

Sorting Field	Sort	Action
Last Name	No	 
First Name	No	 

Preview

Action
 

 	Members	 
 	Column #2	 

Section Item Preview

Members	Column #2
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	

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

Horizontal Align

Vertical Align

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

Related Content

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