Creating Custom Reports

Before You Start

Custom reports are designed to be exported to Excel. Once they're in Excel, you have all the functionality to customize the look, order, etc. any way that you wish. Reports are dynamic, meaning they return the most current data whenever they are run/exported.
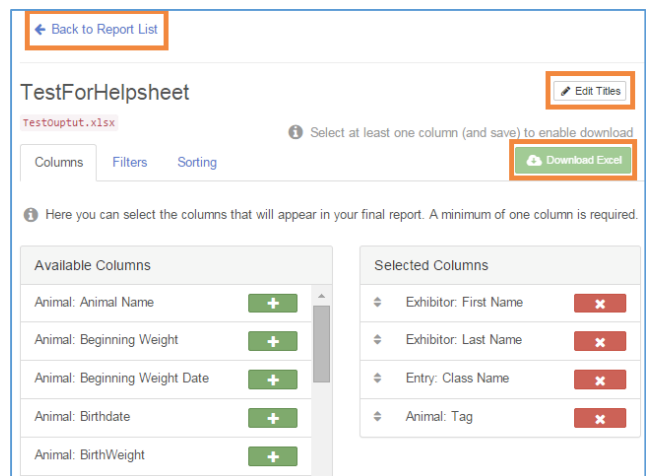
Steps

1. On the top black menu bar, click Reports, and then click the "Create a Report" button.
2. The first step is to name the report and to name the Excel file that will result from the report. These can be the same, or not.
   - *The Report Title is what will help you identify the report on the list when you need to run it again. Keep in mind that they will alphabetize by this field, so have a naming scheme ready.*
3. The rest of the report creation process is basically a 3-step wizard: Columns, Filters, Sorting—what information (fields) do you need, which records are included, how are the results sorted.


Columns:

1. Click on the green "plus sign" beside each field to select it for the report. If you select one in error, use the red "x" to remove it.
2. Order the columns by using the up/down arrows in the selected columns list.
3. When you are finished, click "Save Columns". After Saving:
   - *"Back to Report List" allows you to stop at this point and come back later to finish or edit.*
   - *"Edit Titles" to change the report name or Excel file name.*
   - *"Download Excel" if you are done—don't need to filter or sort.*

Custom Fields:

If you have set up custom fields for your fair, you can add them to a report, but you must click on the button to select the portion of the hierarchy that contains those questions. Click on the Custom tab at the top of the list of columns to switch to those from Standard.

1. All "Exhibitor" custom fields (the ones that were added at the Fair level of the hierarchy) are available to print regardless of what portion of the hierarchy that you select.
2. "Entry" questions are those that were added at the department, division, or class level of the hierarchy. They are only available when you have selected a portion of the hierarchy that would contain them.
3. Hierarchy selection automatically filters the report to only entries within that portion of the hierarchy. If you select the Beef department, you will not see entries in the Swine department on the report.
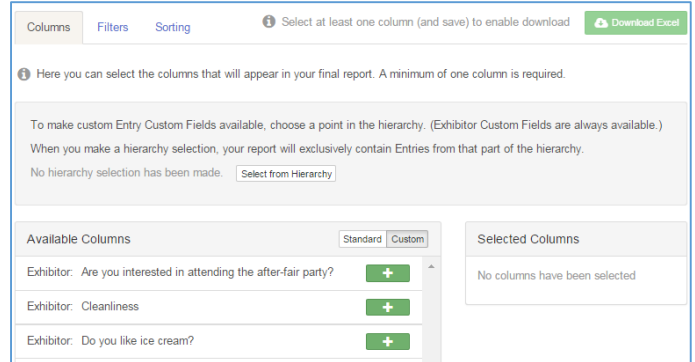
Filters:

1. Click on the "Filters" link at the top.
2. You have a choice of "Any" or "All", which correspond to "or" and "and" in logic.
   - *All: if you list 3 conditions, the only records that will be listed are the ones that meet all 3 of them.*
   - *Any: same 3 conditions, but the records listed will be those that meet any one (or more) of the conditions.*
3. "Add a Group" allows you to customize your filters even further.
   - Example: Group 1 is "Any"—Grade = 7, Grade = 8. Group 2 is "All"—Gender = female, Department = Beef. The resulting list would be 7-8 grade girls who are showing beef.
4. Save Filters when finished.
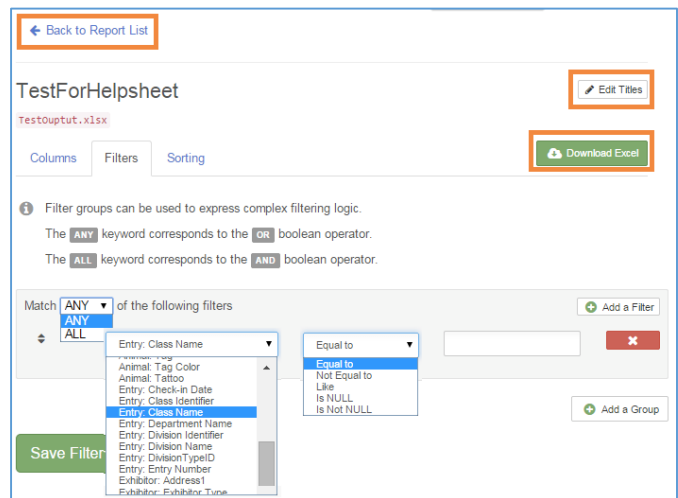
Sorting:
1. Click on the "Sorting" link at the top.
2. This is pretty straight-forward. Select any field(s) to use for sorting, ascending or descending, in the order you want.
   - *If you select a field that has not been included on your report (on the Columns screen), it will be added to your report, at the end of the other columns.*
3. Example: Sort order is County, Club, Last Name. Results =

1Kid	1Club	1County
2Kid	1Club	1County…
1Kid	2Club	1County
2Kid	2Club	1County…
1Kid	1Club	2County

4. Save Sorting, then Download Excel.
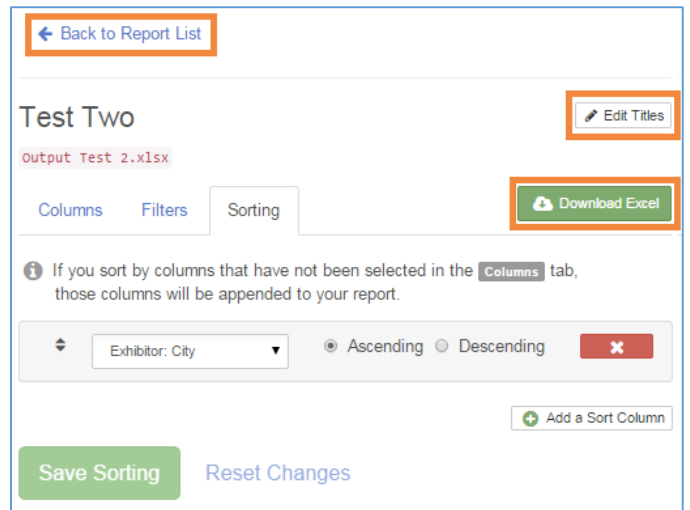
Tips

The Excel format allows you to customize your report with text formatting, new sort order, blank lines between rows, deleting individual rows/columns/cells, etc. If you have very specific needs for data output, this is your best option.