

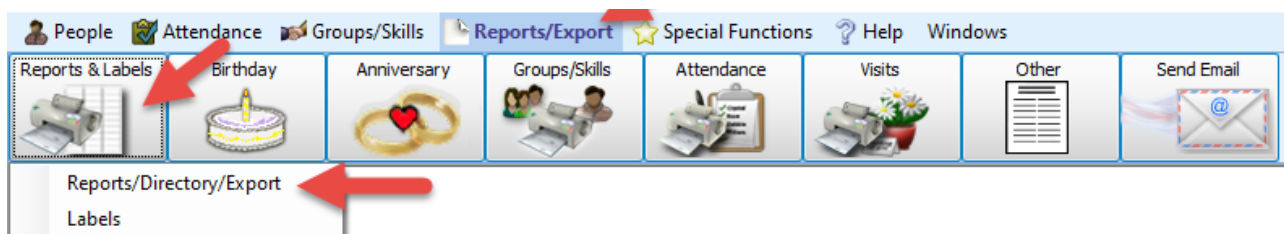
The Basic Report allows you to choose the information and the format you wish to see. The criteria is set on Step 1 and the format is set on Step 2; both are specific to the report you are creating. The *Basic* report can be used for most reporting..

To begin, go to *Membership>Reports* (using the Portal at the center of the screen).



OR

Go to *Reports/Export>Reports & Labels>Reports/Directory/Export*

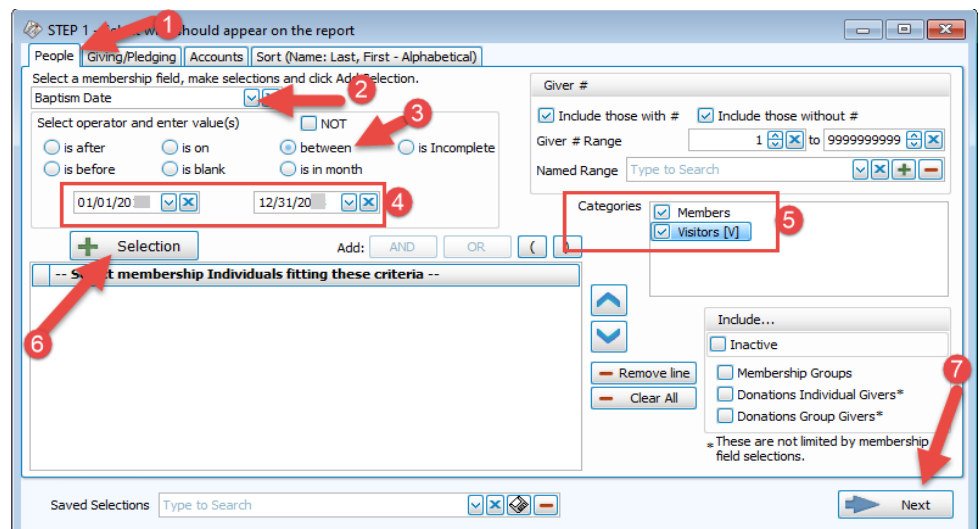


Step 1 - Select *WHO* should appear on the report

- Use the *People, Giving/Pledging, and Accounts* tabs to enter the criteria for the report.
- The *Sort* tab allows you to set the order the people appear on the report.

The example is a Basic report of people that were Baptized between 1/1/20XX and 12/31/20XX. Our criteria...

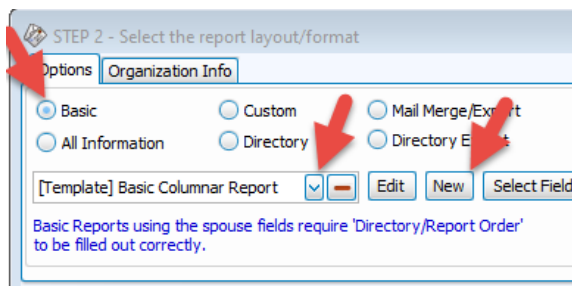
1. At the *People* tab
2. Choose *Baptism Date*
3. Select operator and enter value, choose between
4. Fill in the date range, 01/01/20XX to 12/31/20XX
5. Categories selected are *Members* and *Visitors*
6. Click + *Selection* to confirm the selection
7. Click *Next*.



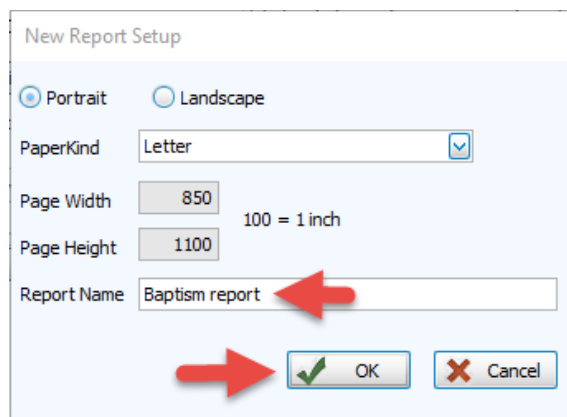
Before you click *Next* on Step 1, you may wish to save your criteria for your report. At the bottom left of the Step 1 screen at *Saved Selections*, click on the floppy disk to 'Save Selections as' and enter a name for your report. Next time you need to run a report with the same criteria, click on the drop arrow at *Saved Selection*.

**Step 2 - Select the report layout/format**

Under *Options*>choose *Basic* and click the drop arrow to choose a template. The default (*Template*) *Basic Columnar Report*, shows *Name*, *Address* and *Primary Phone*. To add a new template for your report, click *New*.

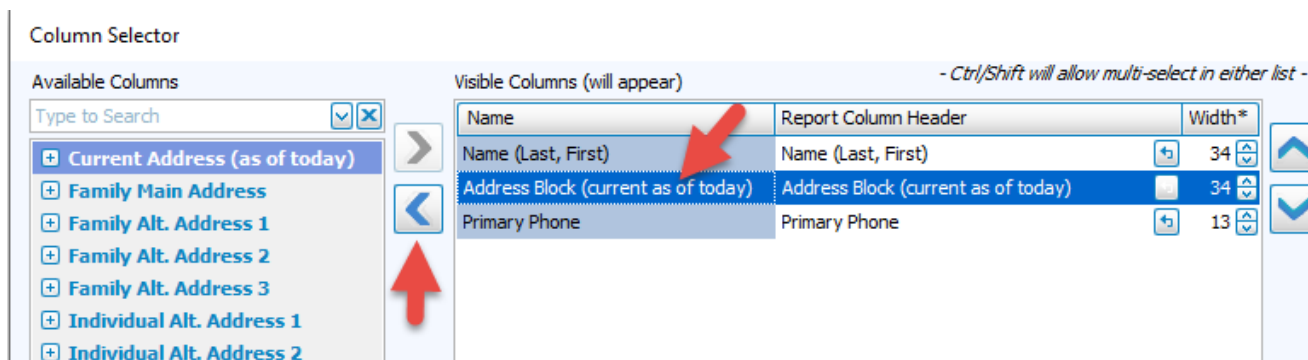


At *New Report Setup*, enter the *Report Name* and click *OK*.



Use the *Column Selector* to choose the columns to appear on the report. *Available Columns* on the left are possible fields available to appear on the report. *Visible Columns* on the right are the fields that have been selected to appear on the report. *Available Columns* will default to *Name (Last, First)*, *Address Block (current as of Today)* and *Primary Phone*. Columns may be added or removed from the report format by clicking the left and right facing arrows. Under *Available Columns* use the *Type to Search* option to find the Columns you would like to appear

For the example report we want to see *Name* and *Baptism date* only. Under *Visible column*, highlight *Address Block* and click on the left facing arrow to move the column to the *Available Columns*, then highlight *Primary Phone* and repeat. At *Available Columns*, *Type to Search* enter the name of the field to be added, highlight it and click on the light facing arrow to move the column to *Visible Columns*.



Column Selector

Available Columns

Baptism Date

Birth Date

Church School Membership

Comments (family)

Comments (individual)

Confirmation Date

Visible Columns (will appear) - Ctrl/Shift will allow multi-select in either list -

Name	Report Column Header	Width*
Name (Last, First)	Name (Last, First)	34

Available Columns

Baptism Date

Birth Date

Church School Membership

Comments (family)

Comments (individual)

Confirmation Date

Visible Columns (will appear) - Ctrl/Shift will allow multi-select in either list -

Name	Report Column Header	Width*
Name (Last, First)	Name (Last, First)	34
Baptism Date	Baptism Date	11

Click **OK** and **Print**.

Please Note: Once a Basic report format is created it is saved and may be reused, no matter what criteria you select on Step 1.