Custom Report Example - Church Directory (V7)

version 7

One of the most requested custom reports in PowerChurch Plus is the Church Directory. Although every church will want something a little different, following is a short example that will help you with designing your own customized directory.

1. From the Personal Profile menu, select the **Custom Reports** option.
2. Begin by adding a new query entitled "**Custom Church Directory**." If this is your first Personal Profiles custom report, you will be automatically prompted for a query title. Otherwise, click **Add**. After entering the your title, click **OK**.
3. In this example, we will include everyone on our church directory. For our filter, we will pick a field (**Household Key Last Name**) and click **Next Step**. Next, choose an operator (**Is not empty**). Click **Done**.
4. At this point, you will be prompted: "**Do you want to run this query now?**" Click **Yes**.
5. After a short instructional screen, you will be prompted to select fields to show in the query output. Select the following fields: **Household Key Last Name, Household Key First Name, Mailing Name, Address Line 1, City + State + Zip/ Postal Code, Home Phone, Profile First Name,** and **Birth Date**. To select these fields, simply double click on each name. Click **Done** when you are finished.
6. From the **Query Overview Window** select **Edit Sort Order**. Since we want to sort by Family, select the following fields in this order: **Household Key Last Name, Household Key First Name, Address Line 1,** and **Directory Sequence**. Once these fields have been selected, click **Done**.
7. Back at the **Query Overview Window**, deselect "**Browse Query Results**" and click **Run Query**.
8. At the **Setup For Column Layout Report**, click on the **Edit Form** button.
9. The first thing we need to do is group each family member to his/her family. To do this, select **Data Grouping** from the **Report** menu. Click the button with three periods **(...)** located in the **Group Expressions** list. In the **Expression Builder** dialog box, enter the following expression: **lastname + firstname_a + address**. Click **OK** then **OK** again.
10. On the **Report Layout Screen**, you will notice five gray bars: **Page Header, Group Header, Detail, Group Footer,** and **Page Footer**. To receive the desired output on this report, we will need to resize these bands. Here's how: Move your mouse over the gray bar labeled **Group Header**. Your pointer will turn into a small up and down arrow. Hold down the left mouse button and drag the bar down an inch or so. Release the mouse button. You will notice that the white area just above the **Group Heade**r is now larger.
11. Next, we will move some of the output fields into the newly resized **Group Header** band. Click and hold down the mouse while on top of the rectangle that contains the field **nameline**. Drag the **nameline** field up to the **Group Header** band (just above the grey **Group Header** bar) and position it similar to the figure below. Move the **address** and **city_zip** boxes into the **Group Header** band in the

same way. (You may need to resize the **Group Header** band again.)

12. In this example, we will not need the fields **lastname** and **firstname_a**. To delete them, click on the field box **lastname** and then press the **Delete** key. Click on the field box **firstname_a** and, again, press the **Delete** key. We will also not be using the text boxes located in the **Page Header** band (just above the **Page Header** bar). To delete these text boxes, simply click on them and press **Delete**.

13. In our next step, we will be adding fields for **homephone, firstname_b** (personal profile first name), and **birth date** if they do not already exist. To do this, we create a field box by selecting the **Field Tool** from the tool bar (the **Field Tool** is a rectangle with the letters "ab" inside). Once you have clicked on this tool, move your pointer into the **Group Header** band and click again. A **Report Expression** window will be displayed. In the expression area, type **homephone** and click **OK**. Click on the newly created field box and move it to the proper location (as shown above). Repeat the same steps to create field boxes for the remaining fields. When creating a field box for **birth date**, enter this expression: **substr(dtoc(born),1,5)**. Move each field into its appropriate location as show above.

14. We will now create a **Page Header** for this report. Before we begin to add text, resize the **Page Header** band using the same procedures outlined above. Next, select the **Text Tool** from the toolbar (the **Text Tool** contains an uppercase "A"). Move your pointer into the white area above the **Page Heade**r bar and click again. Your pointer will now become a blinking cursor. Type the name of your church and then select the **Pointer** tool from the tool bar. Now, let's change the font used on the church name. Click on the text box that contains your church's name. Then, select **Font** from the **Format** menu. Select the font you wish to use and then click **OK**. (In this example, most fields are Arial 10 point). Repeat the same procedures as you create the remaining four text boxes: **"Directory of Families," "Name," "Birth Date,"** and **"Telephone"**. Move these boxes to their proper locations (as shown above).

15. Some field and text boxes may need to be resized. To do this, first click on a field box to select it. You will notice that small squares appear around the box once it is selected. Position your mouse over one of these small squares, click down, and drag that square to enlarge the box.

16. Finally, you will need to create lines that accent your report. To draw lines, select the **Line Tool** from the tool bar (the **Line Tool** looks like a large, off-center plus sign). Next, move your pointer into the **Page Header** band, just above the **Name** text box. Click down and drag the pointer toward the right margin. Release the mouse button. You can adjust the length of any line by dragging the small squares located on either side of the line.

17. If you have a scanned graphic of your church's logo available, you can add it to this report by selecting the **Picture Tool** from the tool bar and then clicking anywhere on the **Page Header** band. A **Report Picture** dialog box will then appear. Enter the file name of your graphic and select the **"Scale Picture - Retain Shape"** bullet. Click **OK**. The picture will appear wherever you initially clicked. You may need to resize or move the picture.
18. Once you have completed these steps, select **Save** from the **File** menu. To close the **Report Designer**, select **Close** from the **File** menu.
19. To print your report, click the **Start Report** button from the **Setup For Column Layout Report** window. Remember, some additional adjustments may be required depending on your printer and report layout. Please refer to the Custom Reports section of your PowerChurch Plus manual for additional information.

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