

Custom Report Example - Church Directory (V10 and higher)

Versions 10 and higher

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 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, Family Phone 1, Profile First Name, and Birth Date**. To select these fields, simply double click on each name. Click **Done** when you are finished.
6. **Query Overview Window**, select **Pick Output Type**. Now select **Report in Form Layout**, then click **Done**.
7. 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**.
8. Back at the Query Overview Window, deselect **Browse Query Results** and click **Run Query**.
9. At the **Setup For Form Layout Report**, click on the **Edit Form** button.
10. 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 **Add**. In the **Expression Builder** dialog box, enter the following expression: **lastname + firstname_a + address**. Click **OK** then **OK** again.
11. 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 Header** is now larger.
12. 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 gray **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. (Note: You may need to resize the **Group Header** band again.)

13. In this example, we will not need the labels **Last Name:**, **First Name:**, **Mailing Name:**, **Address:**, **City + State + Zip/Postal:**, **Phone 1:**, **First Name:** and **Birth:**. To delete them, click on the label box **Last Name:** and then press the **Delete** key. Click on the field box **First Name:** and, again, press the **Delete** key. Repeat this process for the rest of the labels **Address:**, **City + State + Zip/Postal:**, and so on, as noted above in this step

14. Now, we can safely delete the fields called **firstname_a**, **lastname**, and **qm_space**. Slide the data field **firstname_b** over to the left (to line up with your desired margin) and **born** to the right of it. This is done by clicking in the field, and while holding the mouse button, slide the field over. Slide the field called **phone1** up into the **Group Header** band, to the right of the existing fields.
15. 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 Header** 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 procedure 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).
16. 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.
17. 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.
18. 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.

19. Once you have completed these steps, select **Save** from the **File** menu. To close the Report Designer, select **Close** from the **File** menu.
20. To print your report, click the **Start Report** button from the **Setup For Form 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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