



## Save/Edit/Delete a Report

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Saving a report enables you to easily generate a report again in the future without having to re-select and set up all the fields and options.

### Save a Report

To save a report:

Firstly, login to your [Online Membership Database](#) - If you don't have your login details please contact your State Governing Body or Association.

1. After setting up a report (click here for instructions), scroll to 'Saved Reports' at the bottom of screen.
2. Click on Save.



3. A lightbox will open asking you to enter a name for the report. Type in a name for the report and click on **Save**.

A dialog box titled "Enter Report Name" with a close button (X) in the top right corner. Below the title bar is a single-line text input field. At the bottom of the dialog are two buttons: "Cancel" and "Save".

4. A confirmation message will appear informing you that the report has been saved.

## Run a Saved Report

To run a saved report:

1. From the main 'Reports Manager' screen, click on the category of report that the saved report belongs to.

The "Reports Manager" interface. At the top right, there is a search bar with the text "Search, find and store the teams you play for or follow" and a "Find out more" button. The main content area contains the following text:

Reports are grouped into different areas depending on the data they report on. Choose the type of report you would like to use from the buttons on the left.

There are two types of reports present in the system.

1. **Quick Reports** - Indicated by the 'Run' button, they are predefined and allow you a quick look at your data.
2. **Advanced Reports** - Indicated by the 'Configure' button, they allow you to define which fields you want to display and add custom filters to your report.

The sidebar on the left contains the following report categories: Clearances, Clubs, Competition, Contacts, Finance, Match Officials, Members, Teams, and Tribunal. These categories are highlighted with a red border.

2. The names of the various reports will appear. Click on Configure for the report that the saved report belongs to.

## Reports

Accreditation

Admin Reports

Competition

Contacts

Finance

**Members**

Teams

Transfers

Tribunal

Members

**Pending Registrations** Configure

Pending Member Registration status

**Advanced Member** Configure

Set your own parameters etc for reporting on Members.

Saved Reports  EDIT RUN

**Retention Report** Configure

Set your own parameters etc for reporting on Member Retention

**Member Demographic** Configure

Member Demographic Report

3. Scroll to 'Saved Reports' at the bottom of screen. Click on Select an Option and select your saved report from the drop-down list.

**Saved Reports**

Select ... RUN EDIT SAVE DELETE

asd

fgc fixtures

test report

4. Click on **Run**.

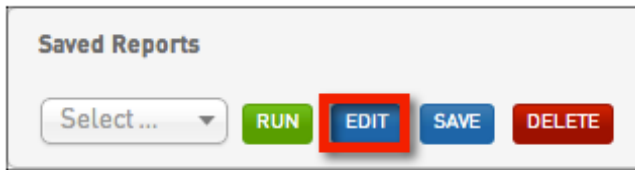
5. The saved report will open or be sent via email (depending on the 'Report Output option' selected).

### Edit a Saved Report

To duplicate a Saved Report and change its parameters (fields, filters or options):

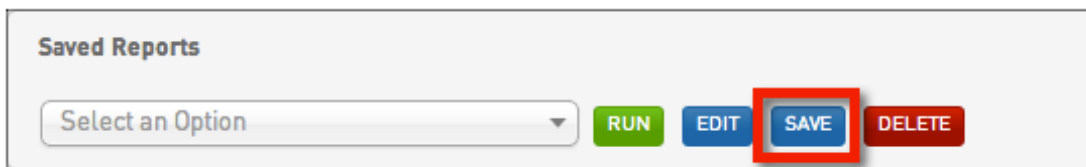
1. Follow steps 1 - 3 for 'Run a Saved Report' above.

2. Click on **Edit**.



3. The report's parameters will appear. Change the fields, filters and options as needed.

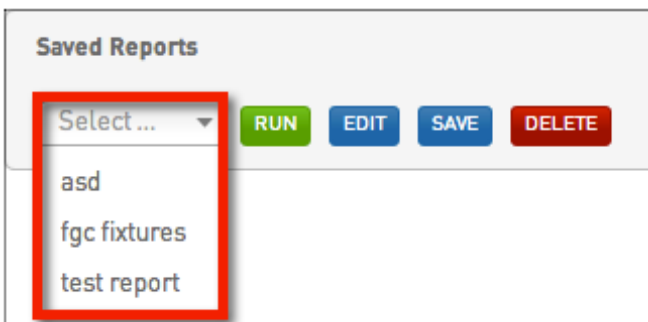
4. When you have finished making the changes to the report, click on **Save**.



5. A lightbox will appear showing the report name. If you leave the name the same, it will append 'Copy 1' to the end of the report name. Alternately, you can give the report a different name. Rename the report, or leave as is (will add 'Copy 1'), and click on Save.

6. A confirmation message will appear informing you that the report has been saved.

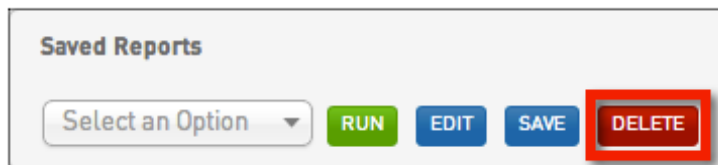
7. When you return to the saved report list, you will notice the new report in your list of Saved Reports. The old report still exists under its original name. If you wish to delete the old report, follow the instructions below under 'Delete a Saved Report'.



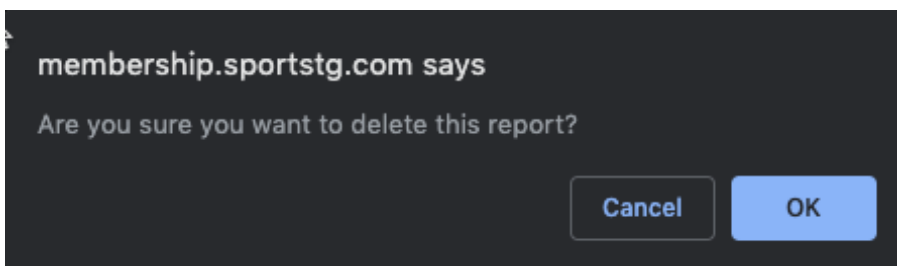
## Delete a Saved Report

1. Follow steps 1 - 3 for 'Run a Saved Report' at the top of this page.

2. Click on **Delete**.



3. A lightbox will appear with the message: 'Are you sure you want to delete this report?' Click on **OK** to delete the report.



4. A confirmation message will appear - 'Saved Report has been deleted'.

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