Creating a Custom Report for a Program

This guide will help you create a simple custom report in flatbridge. If you do not know the data field name you are looking for, you will need to reference the flatbridge tables and data dictionary. You can use this to tweak your reports until we have a reporting tool connected to the flatbridge database.

Step-by-step guide

This guide assumes you have permissions to create a custom report. For the purposes of this tutorial, we want to create a list of participants, their titles, and email addresses for a specific program.

1. From the Flatbridge home screen on the far right select Reports. You will have the option to select an existing report or to create a new custom report:

2. Select Participants Reports by clicking on Custom Reports/Advanced Search - Participants. You will be presented with a screen of available fields for your report which will be centered on participants. A little lower you will see Custom Participant fields, Program Fields, and Company Fields which are related to the participant, check those fields you would like to see on the report, in this case we checked off: Participant Fields: First Name, Last Name, Title, Email Program Fields: Name, Start Date Company Fields: Name

3. At the bottom of the screen you can filter which data you are going to get in a report. In this case I filtered by specifying I only wanted to see records of the participants of programs that contained the letters Wom (for the Womens Leadership Program) and I only wanted to see programs that started after September 1, 2018.
4. I also ordered (sorted) the report by Participants- Last Name, then First Name. When you have the settings right, click Submit.

5. Then the report will show on the screen: *(Names redacted for privacy reasons)*

6. If you like the way it looks and you want to keep the report to run again, you can click the back button on your browser, and at the bottom of the screen you can fill in a name for it:

   - **Format**: Excel
   - **Submit**
   - **Report Description**: Adriene's Test Report

7. Click Save Report and the report will now be available when you select My Custom Reports.
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