

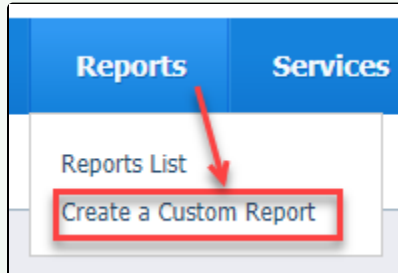
# Creating custom reports

All RescueGroups.org services include the ability to create custom reports on any data in our system. For example, you can create a report on **Animals** and include any data fields and filter by any animal-related fields.



## Where do I find it?

To create custom reports, go to **Reports > Create a Custom Report**.



You can find the list of all of your reports at **Reports > Reports List** and you can see all of your custom reports under the heading, **My Custom Reports**.

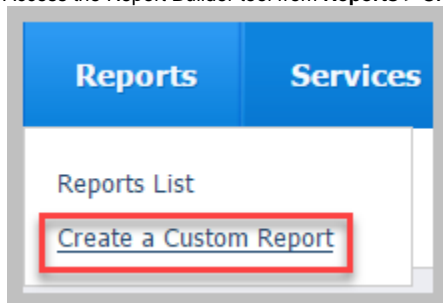
## On this page:

- [Designing your custom report](#)
- [Creating a custom report about your animals](#)
- [Saving a custom report](#)
- [Cloning or creating a copy of an existing custom report](#)
- [Exporting data from a custom report](#)

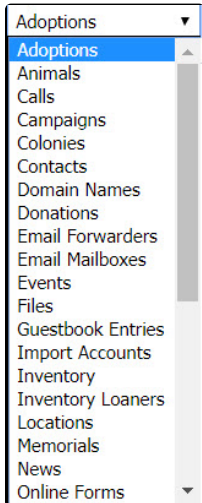
# Designing your custom report

To create a custom report, follow these steps:

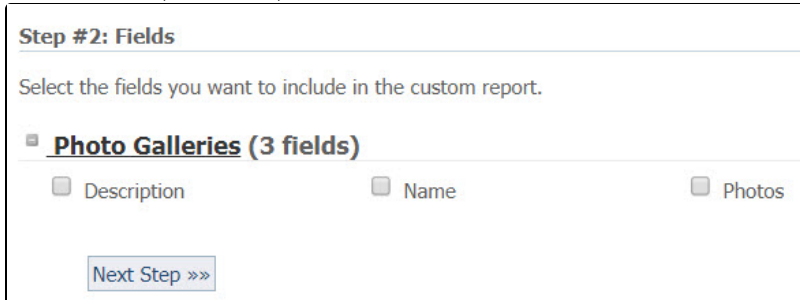
1. Access the Report Builder tool from **Reports > Create a Custom Report**.



2. Select the data on which to base the report from the drop-down list that displays. Use the scroll bar at the right side to review all the possible selections.



3. Click **Next Step**.
4. Select the fields to include by checking each one. Each selection from step 2 above contains a comprehensive list of available fields for that selection. Animals, for instance, has over a hundred. Here is the list of fields for the **Photo Galleries** selection, by contrast.



5. Click **Next Step**.

6. Select from the **Options** page the order of the fields you've chosen, any filters you want to include, how you want the fields sorted, and whether you want to group any of the fields. Please note that some of the options have drop-down menus.

### Report Builder :: Options

Step #3: Filters, Sorting and Grouping Options

Please update the report field order, the filters, sorting and data grouping options.

#### Field Order


Move the report fields into the desired order. Select a field and use the up and down arrows to change the field order.

Animals: Activity Level  
Adopters: Active  
Submitted Forms: Animal

#### Filters

Add filters to the custom report. Click the delete button to remove an existing filter from the report.

No filters.

 [Add a filter](#)

#### Sorting

Select the field by which to sort the report, and the sort order.

Sort by: 

Animals: Name

Animals: Housetrained  
Animals: Hypoallergenic  
Animals: Independent/ aloof  
Animals: Indoor/Outdoor  
Animals: Intakes  
Animals: Intelligent  
Animals: Internal ID  
Animals: Lap pet  
Animals: Last Update (timeframe)  
Animals: Last Updated  
Animals: Leash trained  
Animals: Likes to fetch  
Animals: Likes to swim  
Animals: Likes toys  
Animals: Location  
Animals: Location Public  
Animals: Microchip Number  
Animals: Microchip Vendor  
Animals: Mixed  
Animals: Name

#### Grouping

Select one or two fields by which to group the report data.

Group by: 

None

and then by 

None

[Run Report](#)

### Report Builder :: Options

Step #3: Filters, Sorting and Grouping Options

Please update the report field order, the filters, sorting and data grouping options.

#### Field Order


Move the report fields into the desired order. Select a field and use the up and down arrows to change the field order.

Animals: Activity Level  
Adopters: Active  
Submitted Forms: Animal

#### Filters

Add filters to the custom report. Click the delete button to remove an existing filter from the report.

No filters.

 [Add a filter](#)

#### Sorting

Select the field by which to sort the report, and the sort order.

Sort by: 

Animals: Name

in 

Ascending

 order

#### Grouping

Select one or two fields by which to group the report data.

Group by: 

None

and then by 

None

[Run Report](#)

Your report is complete, so click the **Run Report** button. It may take a minute or more to run the report depending on how much information is included.

## Custom Animals Report

### Custom Animals Report

Fields: 3 field(s) on this report

Order by: Animals: Name, asc

Group by: None

Save Report...

Export Data...



Please wait while we load your report data...

## Creating a custom report about your animals

We've created the steps for you to follow in order to create a custom **Animal** report about your animals. This particular report will include all animals with a status of **Available**, will show basic animal fields, and will be grouped by foster.

1. On the **Report Source** page, select **Animals** from the drop-down menu, and click **NextStep** at the bottom.

## Report Builder

### Step #1: Report Source

Select the data type to include in this new custom report.

Adoptions

Adoptions

Animals

Calls

Campaigns

Colonies

Contacts

Domain Names

Donations

Email Forwarders

Email Mailboxes

Events

Files

Guestbook Entries

Import Accounts

Inventory

Inventory Loaners

Locations

Memorials

News

Online Forms

- On the **Fields** page that opens, select the fields you would like to see in the report. In the example below, under **Animals**, we selected **Name**, **General Age**, **Size Potential (General)**, **Altered** and then click **Next Step**.

Select the fields you want to include in the custom report.

**Animals (139 fields)**

<input type="checkbox"/> Activity Level	<input type="checkbox"/> Even tempered	<input type="checkbox"/> Location	<input type="checkbox"/> Primary Breed
<input type="checkbox"/> Adopted Date	<input type="checkbox"/> Exact Birthdate	<input type="checkbox"/> Location Public	<input type="checkbox"/> Protective/ territorial
<input type="checkbox"/> Adoption Fee	<input type="checkbox"/> Exercise Needs	<input type="checkbox"/> Microchip Number	<input type="checkbox"/> Reaction to New People
<input type="checkbox"/> Adoption Lead	<input type="checkbox"/> Eye Color	<input type="checkbox"/> Microchip Vendor	<input type="checkbox"/> Reason Not Housetrained
<input type="checkbox"/> Affectionate	<input type="checkbox"/> Foster	<input type="checkbox"/> Mixed	<input type="checkbox"/> Received Date
<input checked="" type="checkbox"/> Altered	<input type="checkbox"/> Foster ID	<input checked="" type="checkbox"/> Name	<input type="checkbox"/> Requires a Home with Fence
<input type="checkbox"/> Animal ID	<input type="checkbox"/> Found	<input type="checkbox"/> Needs a Foster	<input type="checkbox"/> Requires a Yard
<input type="checkbox"/> Apartment appropriate	<input type="checkbox"/> Found Date	<input type="checkbox"/> Needs companion animal	<input type="checkbox"/> Rescue ID
<input type="checkbox"/> Applicant	<input type="checkbox"/> Found Zip/Postal Code	<input type="checkbox"/> Needs ongoing medical care	<input type="checkbox"/> Secondary Breed
<input type="checkbox"/> Available Date	<input checked="" type="checkbox"/> General Age	<input type="checkbox"/> Not good with female dogs	<input type="checkbox"/> Sex
<input type="checkbox"/> Birthdate	<input type="checkbox"/> Gentle	<input type="checkbox"/> Not good with large dogs	<input type="checkbox"/> Shared
<input type="checkbox"/> Breed	<input type="checkbox"/> Good for seniors/ elderly	<input type="checkbox"/> Not good with male dogs	<input type="checkbox"/> Shedding Amount
<input type="checkbox"/> Coat Length	<input type="checkbox"/> Good in a car	<input type="checkbox"/> Not good with small dogs	<input type="checkbox"/> Sight impaired
<input type="checkbox"/> Cold sensitive	<input type="checkbox"/> Good with Adults	<input type="checkbox"/> Notes	<input checked="" type="checkbox"/> Size Potential

- On the **Options** page that opens, under **Filters, Sorting and Grouping Options**, make these changes:

- Under **Field Order** no changes are necessary.
- Under **Filters** click **Add a Filter** and then select the following in the **Add a Filter** pop-up box:
  - Select **Animal: Status** in the **Field** drop-down menu.
  - Leave **Operation** as **Equals**.
  - Select **Available** in the **Criteria** window.
  - Click **Save View Filter**. The pop-up box will disappear.

**Add a Filter for View Custom Animals Report**

Field \*

Operation \*

Criteria

- ☐ Adopted
- ☒ Available
- ☐ Deleted
- ☐ Domestication
- ☐ Euthanized
- ☐ Free Roaming

Select one or more values above for the criteria.  
All records that match any of the criteria will be displayed, ex.: select Dog and Cat

- Under **Sorting** select **Animal: Name** for the **Sort by** field.
- Under **Grouping** select **Animal: Foster** for the **Group by**.

- Click **Run Report**.

## Saving a custom report

From the **Report** page, click **Save Report** to save the report criteria and run the same report again later. When saving the report, select **Share this report** to make the report available to other volunteers in your organization.

**i** The owner of the report (the person who created/saved the report) or a user with *Site Admin* permission can unshare a report by clicking the **unshare** link next to the report.

## Cloning or creating a copy of an existing custom report

To create a copy of a report, do the following:

- Click **Reports > Reports List**.
- Click on the name of the report you would like to clone.
- Click **Save Report as...**
- Change the name of the report.
- Click **Save Report**.

You now have a clone/copy of the original report.

## Exporting data from a custom report

From the **Report** page, you can click **Export Data** to save the report results to a CSV, XML or XLS file on your computer. You can then open the data file with a text editor, and XML viewer, or Excel.

### Available animals by foster

List of animals available for adoption sorted by foster

Fields: 4 field(s) on this report  
Order by: Animals: Name, asc  
Group by: Animals: Foster

Save Report...Save Report as...Export Data...

## Popular Questions

Topics:

- [reports](#)

No questions found.

Have a question about this topic?