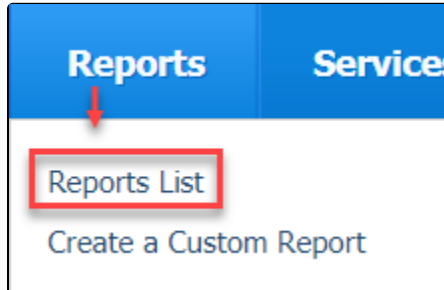


Customizing standard reports

The standard, pre-made reports provided in your account can be customized for your needs by the use of filters. Customizing the pre-made reports is easy. If you can find a report that closely matches what you want to measure, you can just change that report in the ways you need. If you read through this chapter and believe customizing a standard report won't give you the data you need, read [Creating custom reports](#).

Where do I find it?

You can begin to customize the pre-made standard reports by going to **Reports > Reports** list.



On this page:

- [Finding a base report](#)
- [Selecting the fields you need](#)
- [Using the Report Builder](#)

Finding a base report

Customizing the pre-made reports begins by selecting one of the reports that most closely resembles the information you need. This is what the list of pre-made standard reports looks like. Scroll through to select a report. You can click on any that look promising and read about that report. For the sake of this instruction, let's select Animal Journal.

Reports



Create a Custom
Report

My Custom Reports

- [Animal Journal](#) - Animal journal entries
- [Custom Animals Report](#) - Custom Animals Report

Shared Custom Reports

- [Available animals by foster](#) - List of animals available for adoption sorted by foster ([unshare](#))

Animal Reports

[Adoptions](#) - animal adoptions within a date range including animal, foster and adopter information.
[Animals \(all fields\)](#) - a report of all animal fields by animal status and species
[Animal Journal](#) - animal journal report grouped by foster and animal
[Animal Journal \(available only\)](#) - animal journal report of just available animals grouped by foster and animal
[Animal Journal with Description and Picture](#) - animal journal report with animal description and picture grouped by foster and animal
[Animal Journal with Description and Picture \(Available only\)](#) - animal journal report of just available animals with animal description and picture grouped by foster and animal
[Animal Journal Due Dates](#) - animal journal report by due date
[Animal Journal Upcoming Reminders](#) - animal journal report for upcoming journal reminders
[Kennel Card](#) - kennel card report for one animal, designed for printing
[Kennel Card w/ Journal](#) - kennel card report with basic info, journal entries
[Print Summary](#) - printable list of animals with basic information, description and picture
[Animal Details](#) - detailed information in table format
[Animals Available in the Future](#) - lists all animals that have an available date in the future
[Animals with Foster](#) - shows all animals grouped by foster, and optionally with foster comments
[Animal Intakes](#) - all animal intakes within a date range including animal, date, type and condition
[Animal Outcomes](#) - all animal intakes within a date range including animal, date, type and condition
[Animal Arrivals](#) - animal arrivals by date
[Animal Transfers](#) - animal transfers by date
[Animals with Notes](#) - animal report including the foster and notes
[Asilomar Reporting](#) - standardized advanced Asilomar reporting by date

Pet Adoption Tracker Reports

[Tracker](#) - Pet Adoption Tracker reports.

Calls Reports

[Closed Calls](#) - all closed calls
[Closed Calls with Notes](#) - all closed calls with the notes from the call log

Contact Reports

[Contacts](#) - a full report of all contacts
[Volunteers including comment](#) - a report of volunteers with the comment
[Fosters](#) - foster homes and the pets in their care (if any)
[Mailing List Export](#) - a report formatted specifically for export to be used for a mailing list
[All Contacts with Groups](#) - opens in Excel (may be slow)
[Do Not Adopt Contact List](#) - the shared Do Not Adopt list

Donation Reports

[Donations](#) - donations by date

Website Reports

Selecting the fields you need

Once you've opened your selected report, click the link titled **Fields**.



Note that sometime it may take several minutes to load the report once you have data.

Animal Journal

Animal journal entries

Fields: 4 field(s) on this report

Order by: Animals Journals: Animal, asc

Group by: Fosters: Name and then by Animals: Name

Save Report...

Export Data...



Please wait while we load your report data...

Select from the resulting display those to include on the report.

☐ **Animals Journals (11 fields)**

☐ Animal

☒ Comment

☒ Cost

☒ Date

☐ Due Date

☒ Entry Type

☐ Journal ID

☐ Reminder

☐ Reminder Date

☐ Reminder Full Name

☐ Status

Using the Report Builder

Once you've selected the fields, click either the **Order by** or **Group by** link to go to the **Report Builder**:

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 Journals: Entry Type	▲
Animals Journals: Date	
Animals Journals: Cost	▼
Animals Journals: Comment	
Animals: Description (no html)	
Animals: Thumbnail	▼

Filters

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

-  **Status** Equals "Available"
-  **Entry Type** Equals "Temperament"

 [Add a filter](#)

Sorting

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

Sort by: ▼

in ▼ order

Grouping

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

Group by: ▼

and then by ▼

[Run Report](#)

- You can change the order in which the fields display in the finished report by highlighting a field and using the up and down arrows at the right side of the selections to move that field into place.
- You can add a filter to a report, just as you can with a custom report. First, you select a field to filter, then select an operation, then enter the criteria. In this case, **Status** was selected, and the operation was **Equals**. The selected status was **Available**, which would return all animals with an available status.
- You can sort the report by any of the selected fields. In this case, we selected **Animal** as the field to sort the report, and we selected to sort it in ascending order.

- You can group the report so that all records of one selection (Group by) are in one place. In this case, we grouped first by the foster and then by the animal. This groups Foster A's animals together.

Add a Filter for View Animal Journal

Field *

Animals Journals: Animal

Operation *

Equals

Criteria

You can use "this", "that" and all records criteria will be displayed.

You can also use the following special values:
"rg:today" is today's date for comparisons
"rg:contactID" is your personal Contact ID

Cancel

Save View Filter

☐ Add Another

Add a Filter for View Animal Journal

Field *

Select a Field...

Operation *

Select a Field...

Criteria

Animals Journals: Animal

Animals Journals: Comment

Animals Journals: Cost

Animals Journals: Date

Animals Journals: Due Date

Animals Journals: Entry Type

Animals Journals: Journal ID

Animals Journals: Reminder

Animals Journals: Reminder Date

Animals Journals: Reminder Full Name

Animals Journals: Status

Animal: Activity Level

Animal: Adopted Date

Animal: Adoption Fee

Animal: Adoption Lead

Animal: Affectionate

Animal: Altered

Animal: Animal ID

Animal: Apartment appropriate

Cancel

Save View Filter

Popular Questions

Topics:

- [reports](#)

No questions found.

Have a question about this topic?