Reporting guide

Version 2.0

Copyright information

Trademarks

Table of contents

Reporting

The Reporting feature allows a LeagueOne administrator to run standard reports, create customized reports, run reconciliation reports, and export staff and player data.

Report filters

Filters can be powerful tools for your reports. They allow you to decide what information should be retrieved from the system. You can use a filter to retrieve a specific value in a report field. Or you can use the wildcard character—%— in a report field to retrieve partial values. For example, to bring back all registrants with last names that start with J or Sm, you would use the following filters: J%, Sm%.

Opening the Report Center workspace

The LeagueOne **Report Center** workspace is where you find all the reports that you can run for your organization.

There are two methods of reporting in LeagueOne: standard reports or custom report templates. Standard reports are part of the LeagueOne system and cannot be edited. Custom report templates are reports that you or other users have created and shared. You can edit custom reports as needed.

Once you run a report, the results show on the **Recent Reports** tab. This allows you to continue to work on other items while larger reports run in the background. You can have the system email you when your report results are ready.

To open the report center:

1. Click **Reporting**.
2. Click **Report Center**. The **Report Center** workspace appears.

Getting your report results

You can get the results of the reports you run on the **Recent Reports** tab of the **Report Center** workspace. The **Recent Reports** tab shows the results of standard and custom reports that have been run in the last 7 days, with the most recent results at the top of the list.

There are three different statuses that a recently run report can have:

- **Processing**: The report results are being generated
- **Generated**: The report results are complete and can be viewed or downloaded
- **Error**: An error occurred while the report was processing

You can view or download the results of your report once the report's status is **Generated**. The option to view or download depends on the **Report Result** format you selected.

To get your report results:

- From the list of recently run reports, do one of the following:
    - Click **View**. The report results open in a new tab in your browser window.
    - Click **Download**, and then choose to open or save the file.

Removing your report results

You can remove your report results from the **Recent Reports** tab in the **Report Center** workspace.

To remove your report results:

1. From the list of recently run reports, click **Remove** for the report results that you want to remove.
2. Click **OK**.

Running a standard report

You can run a standard report on the **Standard Reports** tab in the **Report Center** workspace. Standard reports are part of the LeagueOne system and cannot be edited.

To run a standard report:

1. From the list of standard reports, select the report you want to run.
2. If applicable, select any specific criteria required for the report.
3. From the **Output Format** list, select the report results format for your report.
4. Click **Process**.

The report shows as **Processing** on the **Recent Reports** tab. Once the report has completed, you will have the option to view or download the report results.

Running a custom report

You can run a custom report on the **Custom Reports** tab in the **Report Center** workspace.

To run a custom report:

1. From the list of custom reports, select the one you want to run.
2. Click Run Report.

The report shows as **Processing** on the **Recent Reports** tab. Once the report has completed, you will have the option to view or download the report results.

Creating a custom report

You can create a custom report on the **Custom Reports** tab in the **Report Center** workspace. The custom reports feature allows administrators to build their own reports by choosing the information they want to include.

The **Custom Reports** tab lists custom reports previously created by your organization. If applicable, the **Custom Reports** tab also shows any custom reports that have been shared by other organizations within the National Governing Body (NGB), if applicable. Shared reports are identified by the **Shared Document** image ( ). You cannot edit or remove shared reports that were created by other users.

There are three pages in the **Create New Report** wizard:

- Report information (see *Entering custom report information on page 3*)
- Report fields (see *Managing custom report fields on page 4*)
- Report field names and filters (see *Customizing custom report field names and filters on page 4*)

To create a customer report:

1. Click **New**. The **Create New Report** wizard appears.
2. Fill out the required fields on each page of the **Create New Report** wizard.
3. Do one of the following:
    - To save your changes and run the report, click **Save & Run Report**.
    - To run the report with your changes without saving, click **Run Report**.

Entering custom report information

You can enter custom report information on the first page of the **Create New Report** wizard.

To enter custom report information:

1. Enter a name and description for the report.
2. Select the report type.

    Note: If you do not see the report type you want, contact your administrator to make sure you have access rights to create reports of that type (applicable to NGB organizations only).

3. Enter a date range for your report.
4. If applicable, select the program details.
5. Select the format for the report results.
6. If applicable, enter an email address for notification when the report is ready.
7. Click **Next** to continue.

Managing custom report fields

You can manage custom report fields on the second page of the **Create New Report** wizard. Fields that can be added to your report appear in the **Available Fields** list. Fields that have already been added to your report show in the **Selected Fields** list.

To manage custom report fields:

1. From the Available Fields list, select the field you want to add.
2. Click **Add** to add the field to the **Selected Fields** list.
3. Click **Remove** buttons to remove the field from the **Selected Fields** list.
4. In the **Selected Fields** list, use the **Up** and **Down** buttons to manage the order of the fields on your custom report.
5. Click **Next** to continue.

Customizing custom report field names and filters

You can customize report fields names and filters on the third page of the **Create New Report** wizard.

To customize report field names and filters:

1. If applicable, change any display names for your report fields.
2. If applicable, enter any filters you want for this report (see *Report filters on page 1*).
3. Share this report with other administrators by selecting the checkbox next to each applicable organization.

Copying a custom report

You can copy a custom report on the **Custom Reports** tab in the **Report Center** workspace. Copying a report is helpful if you want to edit a report, but you aren't the report creator. By copying the report, you become the creator of the new report that is created.

Note: You can only copy a report if you have access rights to create that type of report.

To copy a custom report:

1. From the list of custom reports, select the report you want to copy.
2. Click **Copy**. The **Copy Report** dialog box appears.
3. Enter a new report name and description.
4. Click **Save**.

Editing a custom report

You can edit a custom report on the **Custom Reports** tab in the **Report Center** workspace.

Note: You can only edit a custom report that you have created.

To edit a custom report:

1. In the list of custom reports, click **Edit** for the report that you want to edit.
2. Use the **Next** and **Back** buttons to navigate through the **Edit Report** wizard.
3. Make any required changes.
4. Do one of the following:
   - To save your changes and run the report, click **Save & Run Report**.
   - To run the report with your changes without saving, click **Run Report**.

Removing a custom report

You can remove a custom report on the **Custom Reports** tab in the **Report Center** workspace.

Note: You can only remove a custom report that you have created.

To remove a custom report:

1. From the list of custom reports, click **Remove** for the report you want to remove.
2. Click **OK**.

LeagueOne Reconciliation

Running a LeagueOne Billing report

You can run the **LeagueOne Billing** report from the **LeagueOne Reconciliation** workspace.

To run a **LeagueOne Billing** report:

1. Click **Reporting**.
2. Click **LeagueOne Reconciliation**.
3. In the **Billing Period** list, select the billing period you want.
4. Click **Show**.

LeagueOne only displays billing periods that have been completed since the club was created in the LeagueOne system.

Reporting options for clubs within an NGB

The following topics are for reporting functionality that is available for clubs within some National Governing Body (NGB).

Opening the Staff Report And Export workspace

The **Staff Report And Export** workspace allows you to find and export staff data for various reasons, the most common of which is to generate photo membership cards and badges.

To open the **Staff Report And Export Workspace**:

1. Click **Reporting**.
2. Click **Export Staff Data**. The **Staff Report And Export** workspace appears.

Finding staff data for export

You can find staff data for export on the **Staff Report And Export** workspace.

To find staff data for export:

1. Select the type of export.
2. Enter your search parameters (see *Entering your staff report search parameters on page 1*).
3. If applicable, exclude previously exported staff (see *Excluding previously exported staff on page 2*).
4. Do one of the following:
    - To bring back staff members and any photos that exist on file, select **Include Photo with Report and Export**.
    - To bring back only the records of staff members that do not have photos, select **Exception Report – Select only Staff with no Photo**.
5. Click Find.

The **Staff Report** appears in the bottom of the workspace. At this point, you can choose to export selected staff member records, export just the staff member's images, or send a photo request email to staff members that don't have images on file.

Entering your staff report search parameters

You can enter your staff report search parameters in the **Staff Report And Export** workspace. The search parameters you enter determine which staff member's records are returned for export.

To enter your staff report search parameters:

1. If applicable, enter any filters for last or first name (see *Report filters on page 1* for more information).

2. If applicable, select a specific **Season**, **Organization**, **Division**, **Job**, or **Job Status**.

Excluding previously exported staff members

You can exclude previously exported staff members from your report in the **Staff Report And Export** workspace.

To exclude previously exported staff members:

1. Select **Exclude Staff previously exported between**.
2. Enter in the dates for excluding staff.
3. If applicable, select or deselect the appropriate sessions.

Exporting staff member's data

You can export staff data member's after finding the staff members you want in the **Staff Report And Export** workspace (see *Finding staff data for export on page 1*).

To export staff member's data:

1. To avoid duplicate staff records in the export, select **Download only one Record per Person**.
2. Select the staff records you want to include in the export. To include all the records, select the checkbox next to the column headings.
3. Click **Download Staff Data**. A dialog box appears.
4. Click **OK** to update the export date for the records you are exporting. Click **Cancel** to continue exporting without updating the export date. A new browser window opens.
5. Click **download**.

Exporting staff member's images

You can export staff member's images after finding the staff members you want in the **Staff Report And Export** workspace (see *Finding staff data for export on page 1*).

To export staff member's images:

1. To avoid duplicate staff images in the export, select **Download only one Record per Person**.
2. Select the staff records you want to include in the export. To include all the records, select the checkbox next to the column headings.
3. Click **Download Images**. A new browser window opens.
4. Click **download**.

Sending a photo request email to your staff

You can send a photo request email after finding the staff members you want in the **Staff Report And Export** workspace (see *Finding staff data on page 1*).

To send a photo request email to your staff:

1. Select the staff records you want to send a photo request email to.

   Note: If you select a record that has a photo on file, the system still sends the photo request email.

2. Click **Send Email.**
3. Click OK.

An automated email request is sent to each selected record that has a valid email address on file. The email includes upload instructions for the related staff member's record.

Opening the Player Report And Export workspace

The **Player Report And Export** workspace allows you to find and export player data for various reasons, the most common of which is to generate photo membership cards and badges.

To open the **Player Report And Export** workspace:

1. Click **Reporting**.
2. Click **Export Player Data**. The **Player Report And Export** workspace appears.

Finding player data for export

You can find player data for export on the **Player Report And Export** workspace.

To find player data for export:

1. Enter your search parameters (see *Entering your player report search parameters on page 4*).
2. If applicable, exclude previously exported players (see *Excluding previously exported players on page 4*).
3. Do one of the following:
   - To bring back staff members and any photos that exist on file, select **Include Photo with Report and Export**.
   - To bring back only the records of staff members that do not have photos, select **Exception Report – Select only Staff with no Photo**.
4. Click Find.

The **Player Report** appears in the bottom of the workspace. At this point, you can choose to export selected player records, export just the player's images, or send a photo request email to players that don't have images on file.

Entering your player report search parameters

You can enter your player report search parameters in the **Player Report And Export workspace**. The search parameters you enter determine which players are returned for your export.

To enter you player report search parameters:

1. If applicable, enter any filters for last or first name.
2. If applicable, select a specific **Season**, **Organization**, **Division**, **Age Group**, or **Team**.

Excluding previously exported players

You can exclude previously exported players from your report in the **Player Report And Export** workspace.

To exclude previously exported players:

1. Select **Exclude player previously exported between**.
2. Enter in the dates for excluding players.
3. If applicable, select or deselect the appropriate sessions.

Exporting your player data

You can export player data after finding the players you want in the **Player Report And Export** workspace (see *Finding player data on page 3*).

To export player data:

1. To avoid duplicate player entries in the export, select **Download only one Record per Person**.
2. Select the player records you want to include in the export. To include all the records, select the checkbox next to the column headings.
3. Click **Download Player Data**. A dialog box appears.
4. Click **OK** to update the export date for the records you are exporting. Click **Cancel** to continue exporting without updating the export date. A new browser window opens.
5. Click **download**.

Exporting your player's images

You can export your player's images after finding the players you want in the **Player Report And Export** workspace (see *Finding player data on page 3*).

To export your player's images:

1. To avoid duplicate staff entries in the export, select **Download only one Record per Person**.

2. Select the player records you want to include in the export. To include all the records, select the checkbox next to the column headings.
3. Click **Download Images**. A new browser window opens.
4. Click **download**.

Sending a photo request email to your players

You can send a photo request email after finding the players you want in the **Player Report And Export** workspace (see *Finding player data on page 3*).

To send a photo request email to your players:

1. Select the player records you want to send a photo request email to.

   Note: If you select a record that has a photo on file, the system still sends the photo request email.

2. Click **Send Email.**
3. Click OK.

An automated email request is sent to each selected record that has a valid email address on file. The email includes upload instructions for the related player record.