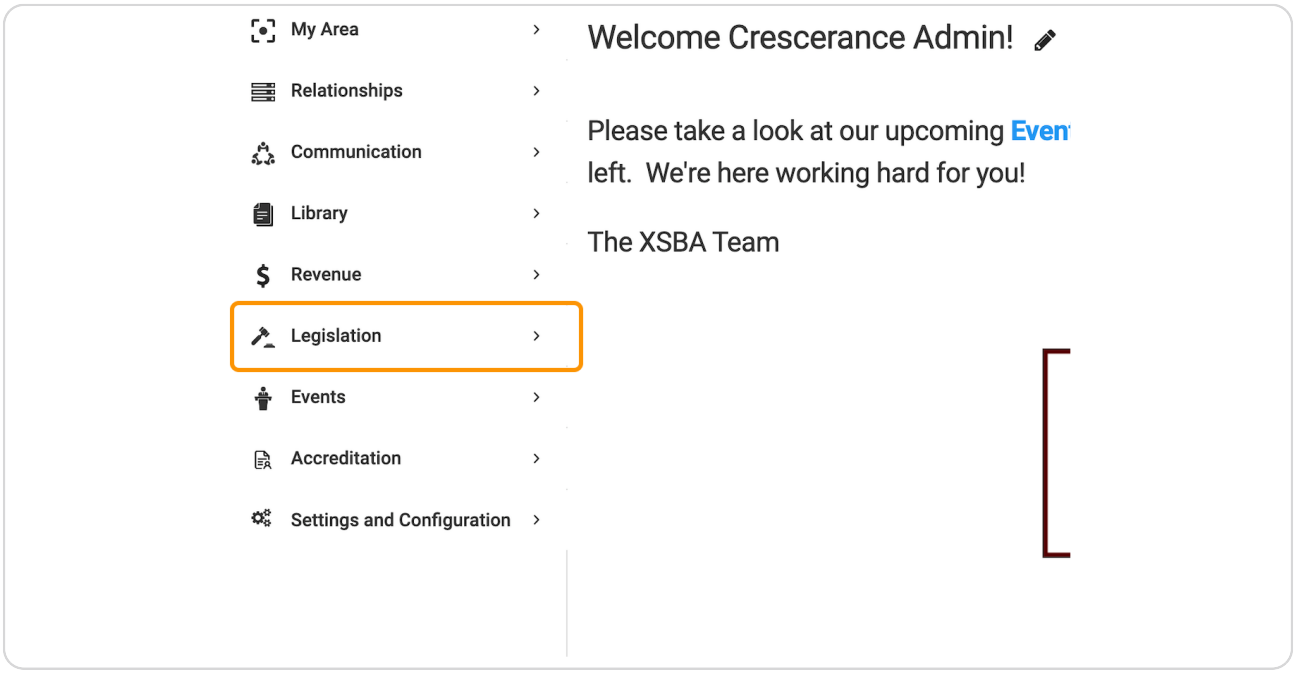
Creating a List Style Report

28 Steps View most recent version

Created by	Creation Date	Last Updated
Engagifii Inc.	October 31, 2023	October 31, 2023

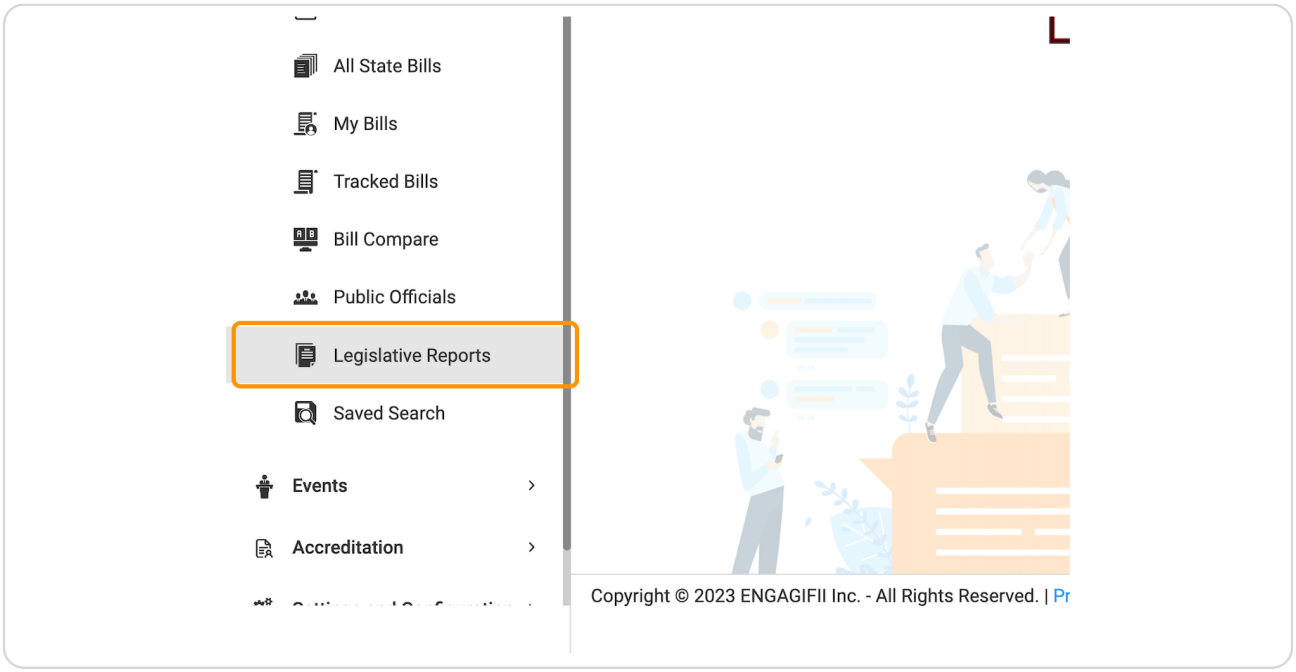
STEP 1

Click on Legislation



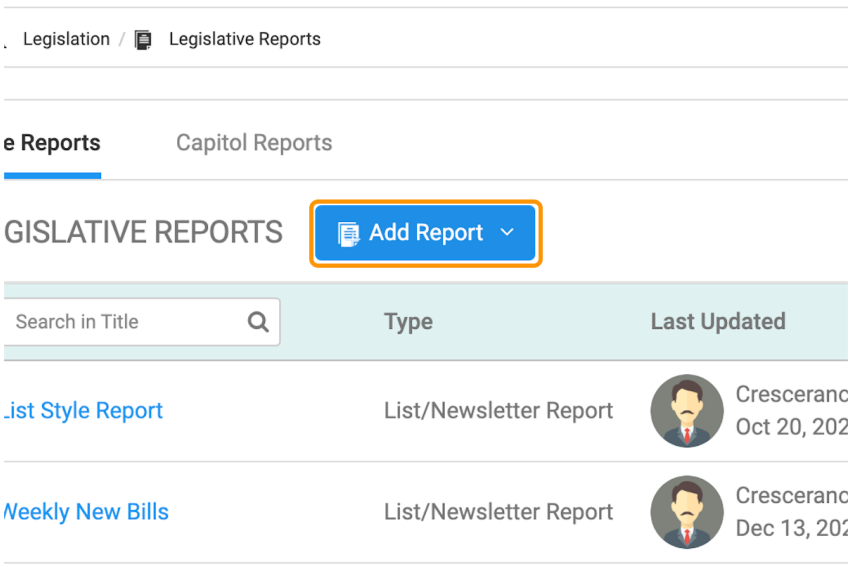
STEP 2

Click on Legislative Reports



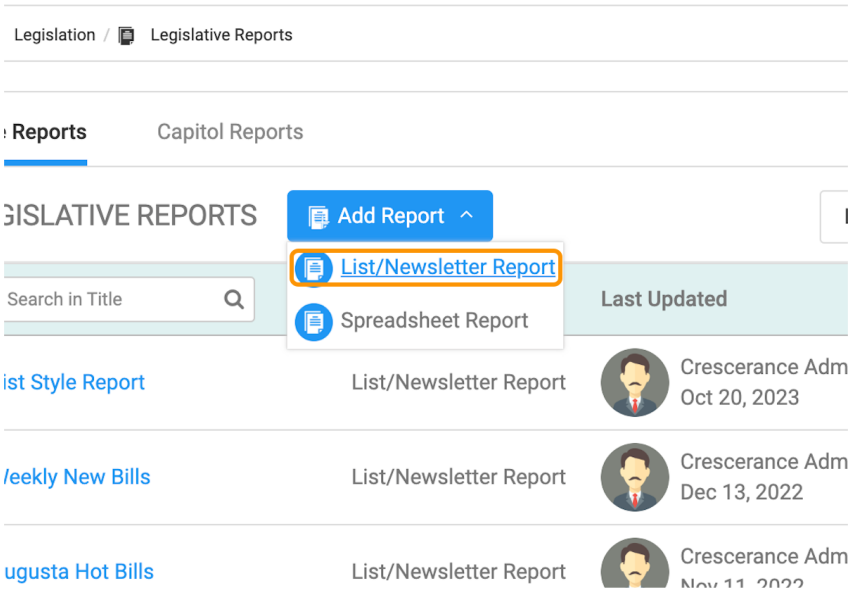
STEP 3

Click on Add Report



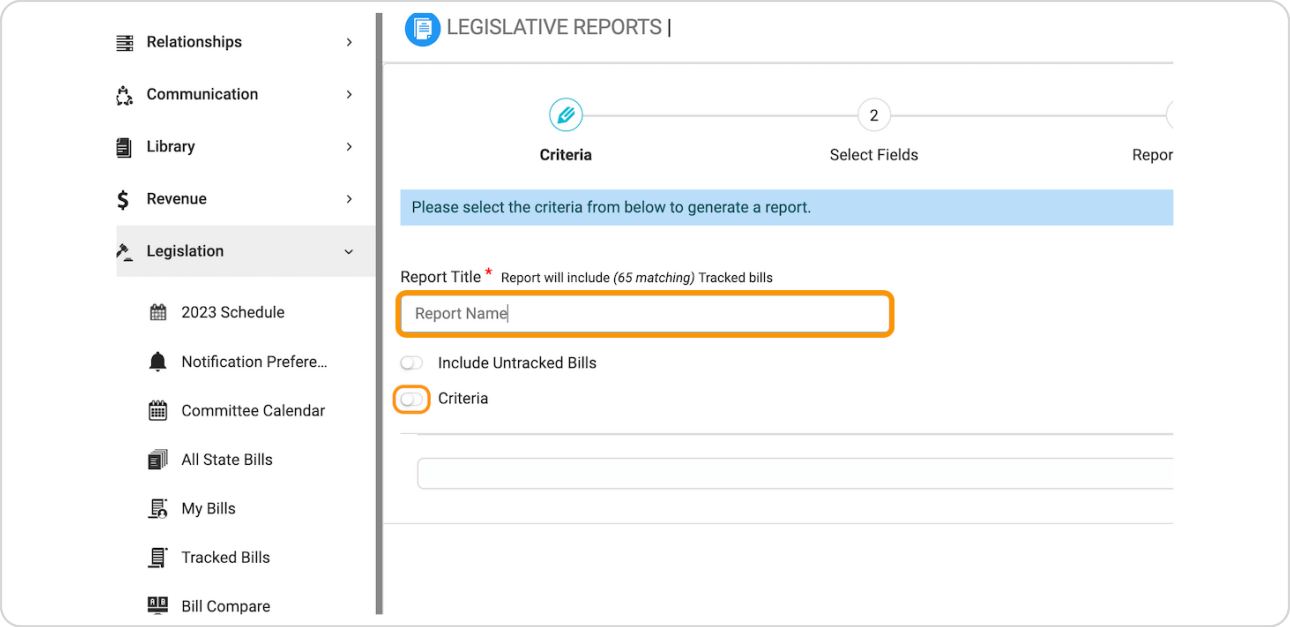
STEP 4

Click on List/Newsletter Report



STEP 5

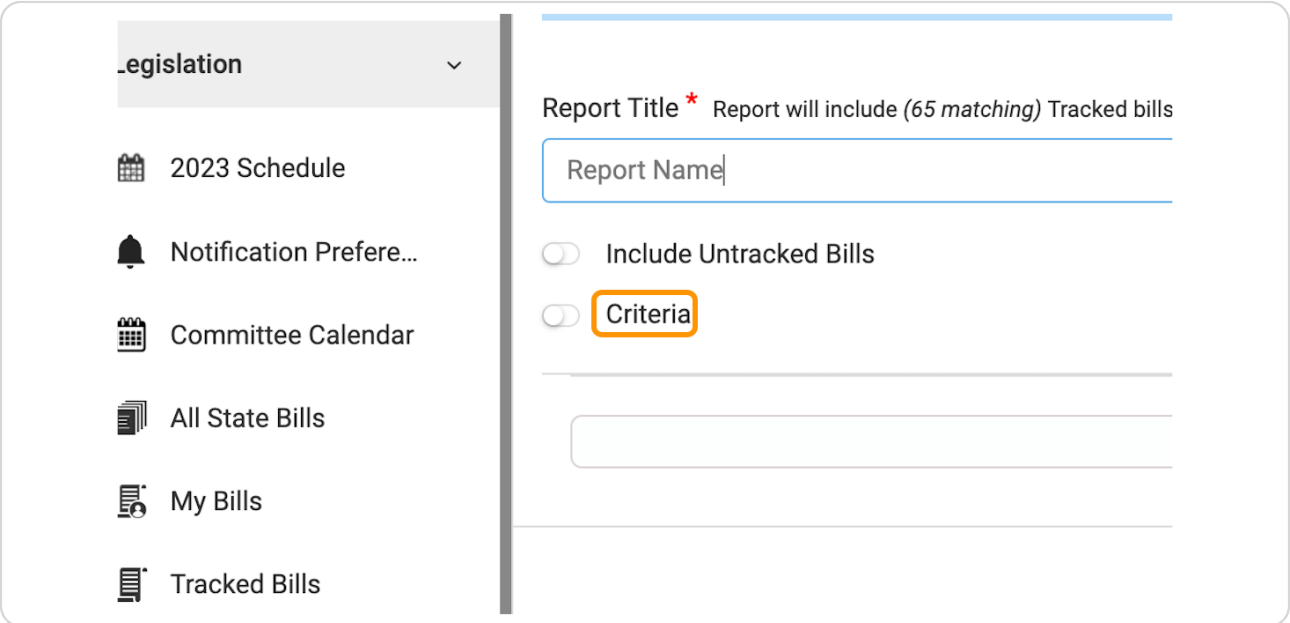
Type in the name of your report



STEP 6

Criteria

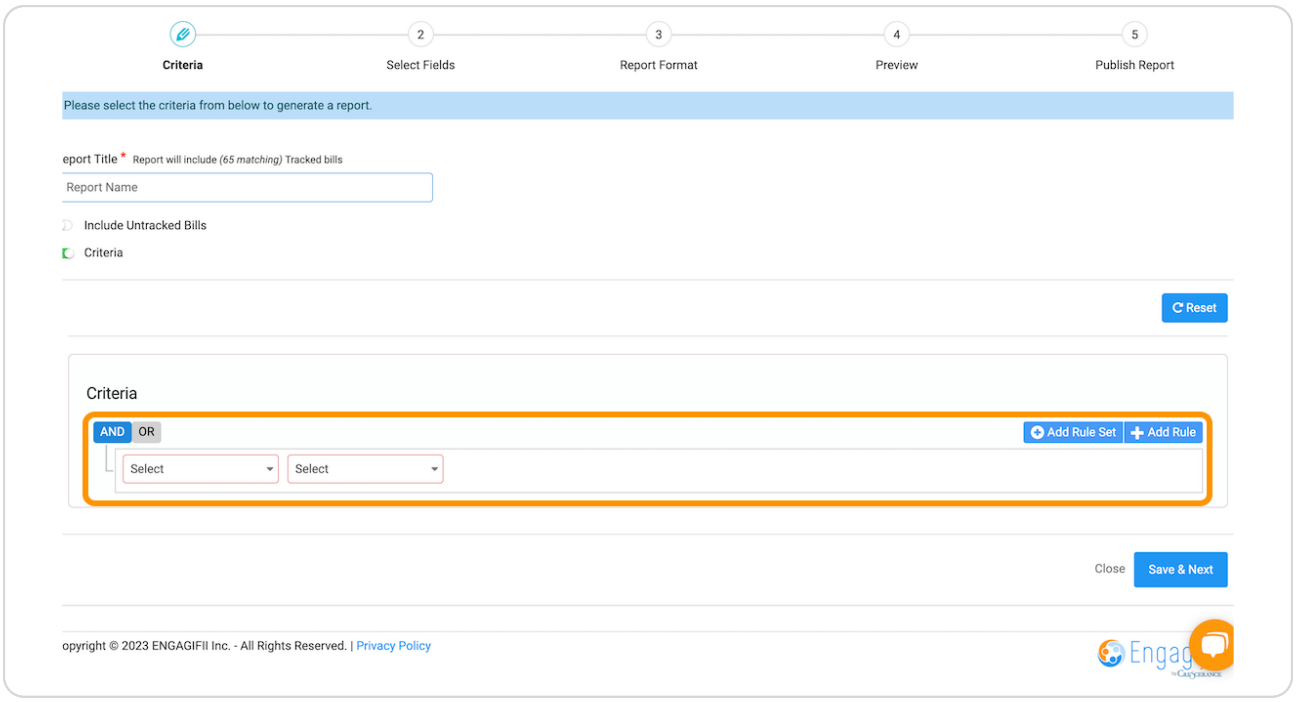
Criteria allows you to create a dynamic report based on pieces of information (such as Introduced Date, or Tags). Think of them like a filter



STEP 7

Adding your Criteria

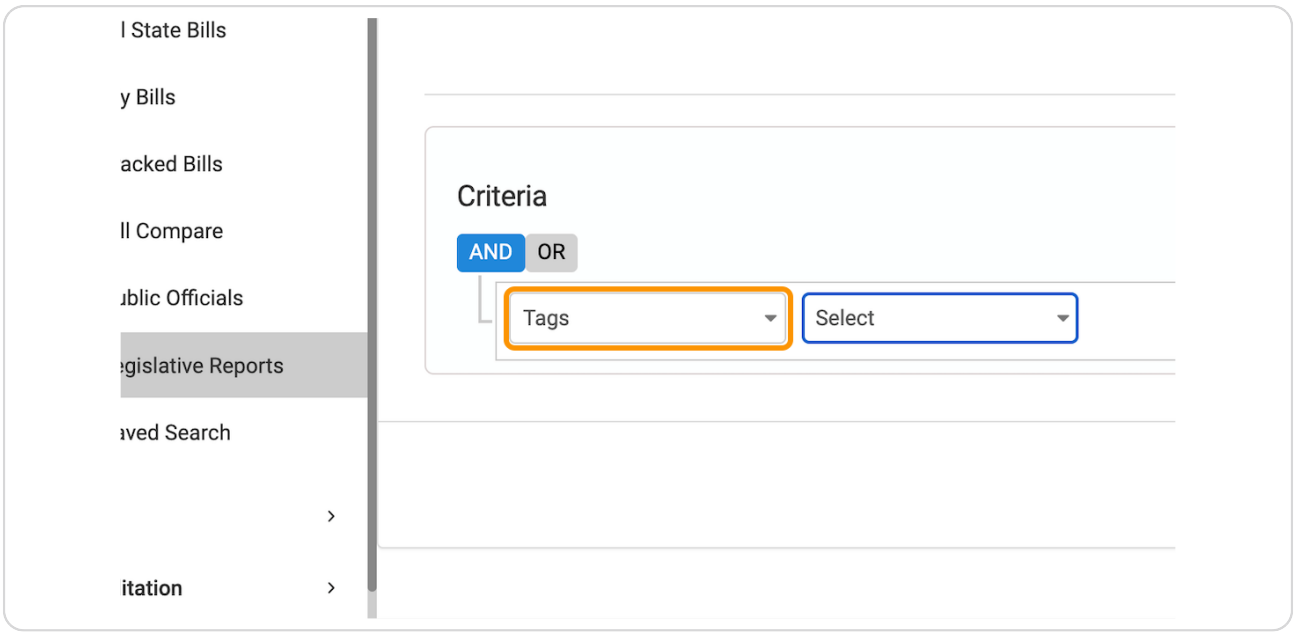
Once you've toggled Criteria to on, you'll see a criteria builder pop up below



STEP 8

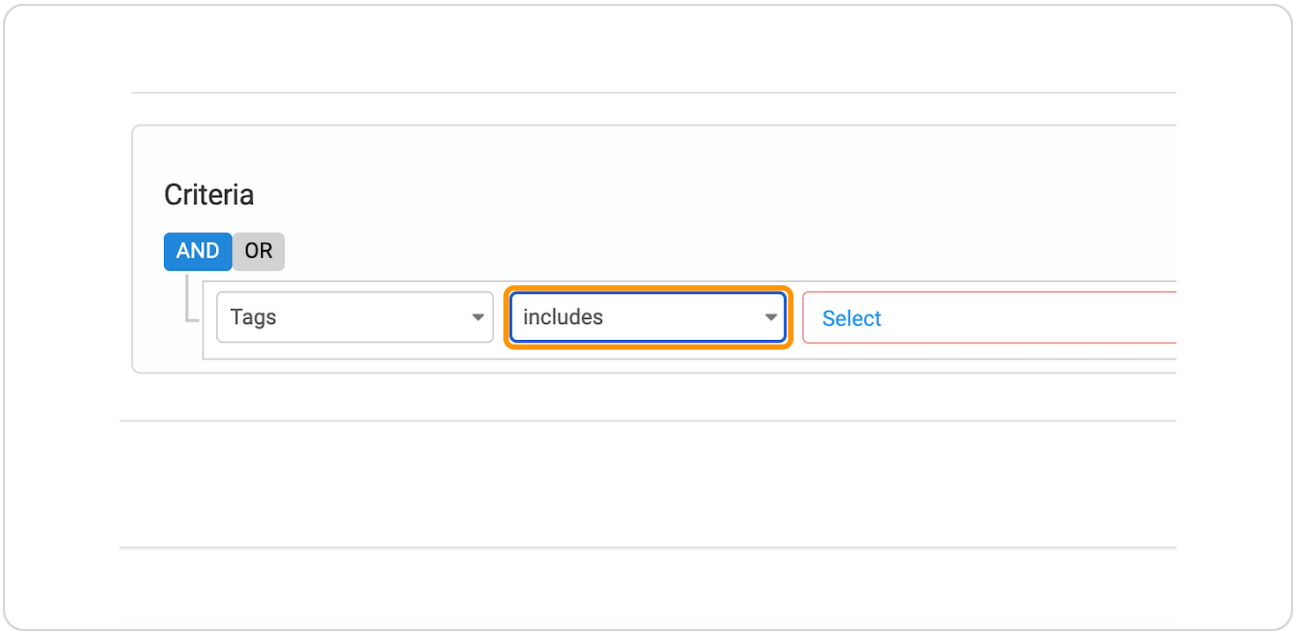
Select your Criteria

In the example below, we'll be using Tags as our criteria, but there are many options available.



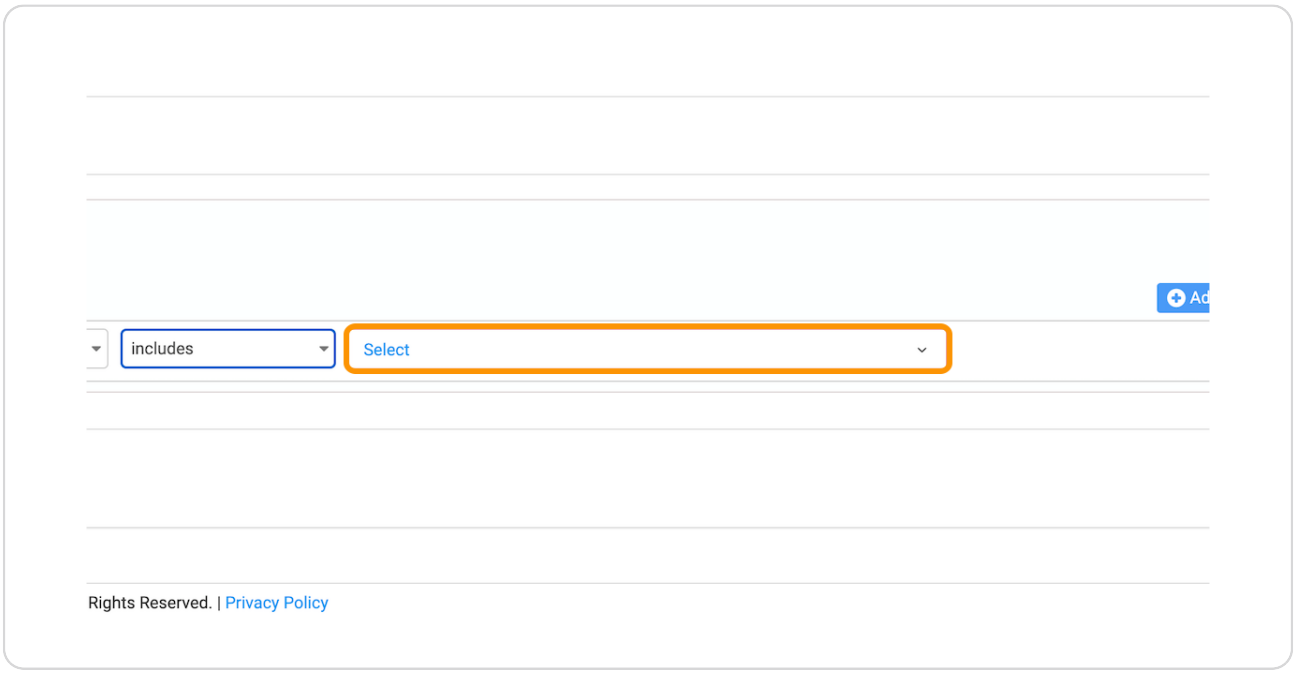
STEP 9

Select includes



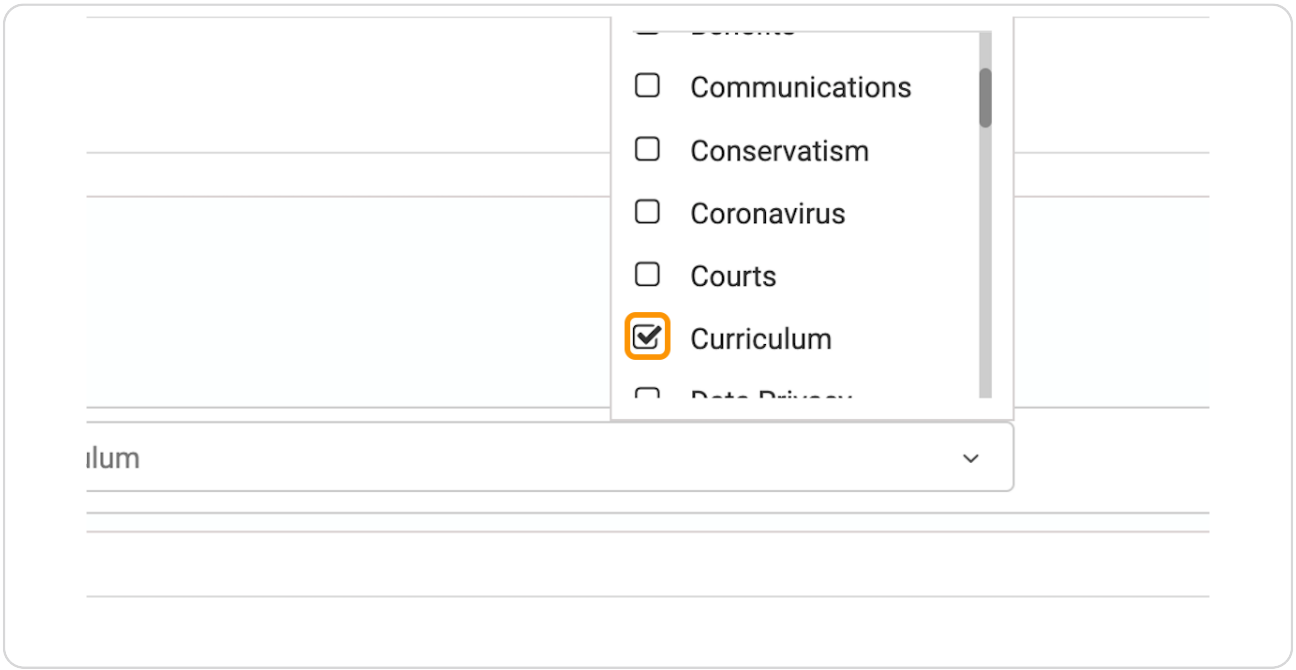
STEP 10

Click on Select



STEP 11

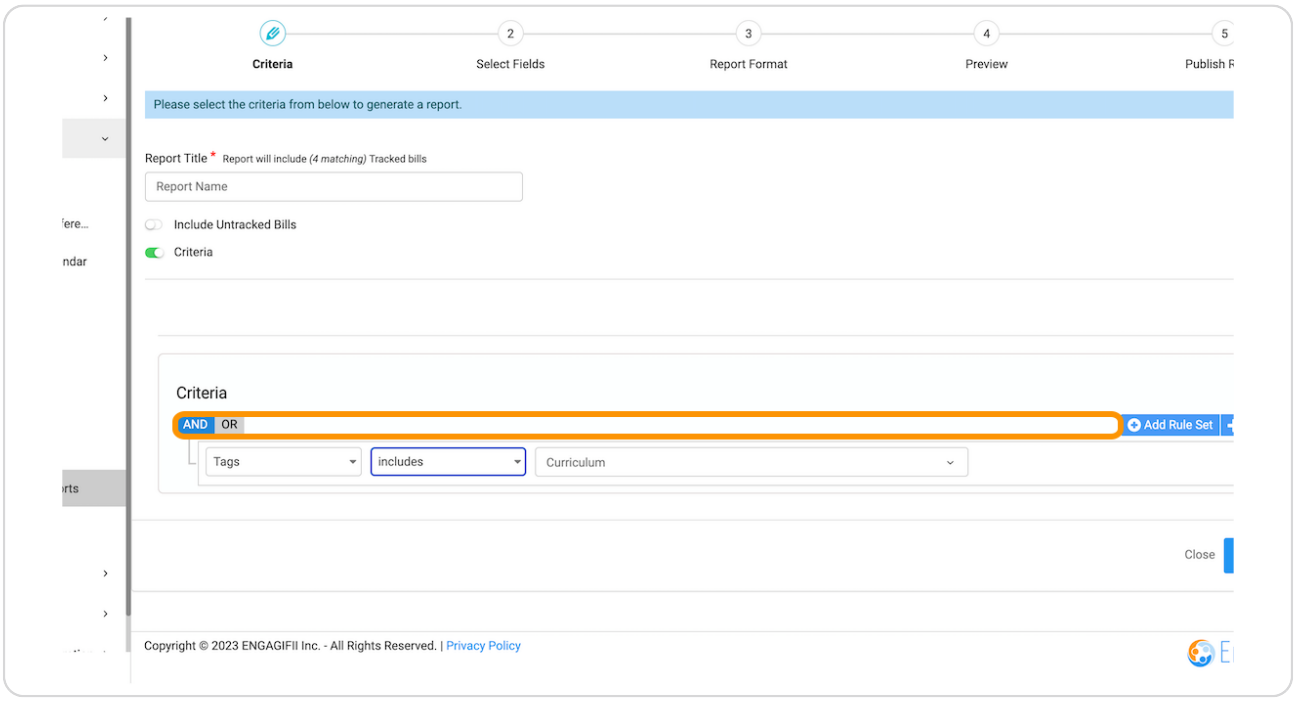
Select the Tag(s) you'd like to include



STEP 12

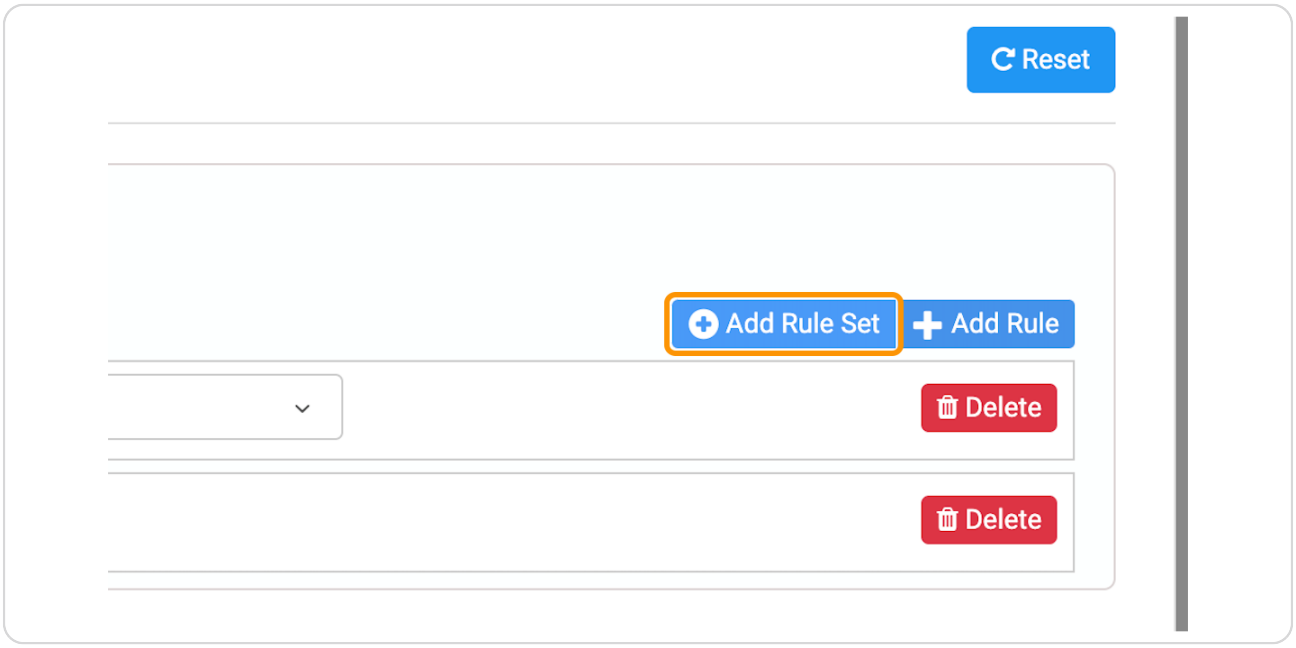
And/Or

The And/Or option allows you to utilize additional rules and hyper-focus your results. For example, you may be looking for Tags AND Introduced Date, another example is look for either/or.



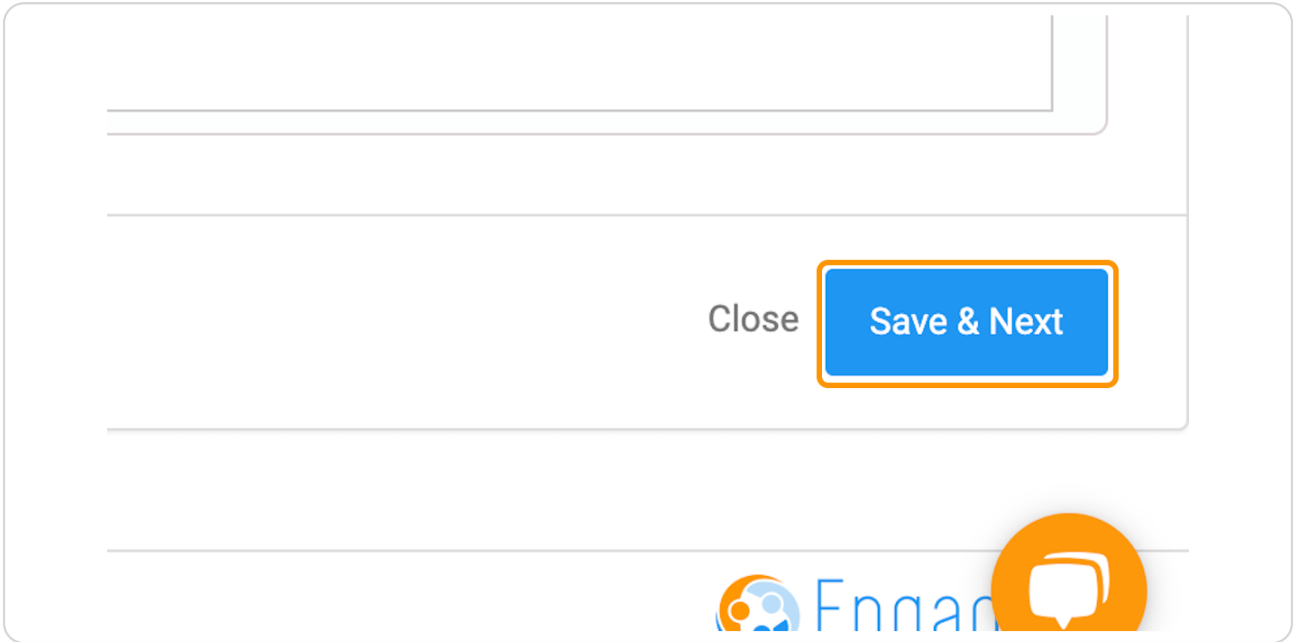
STEP 13

Add Additional Rule Sets or Rules



STEP 14

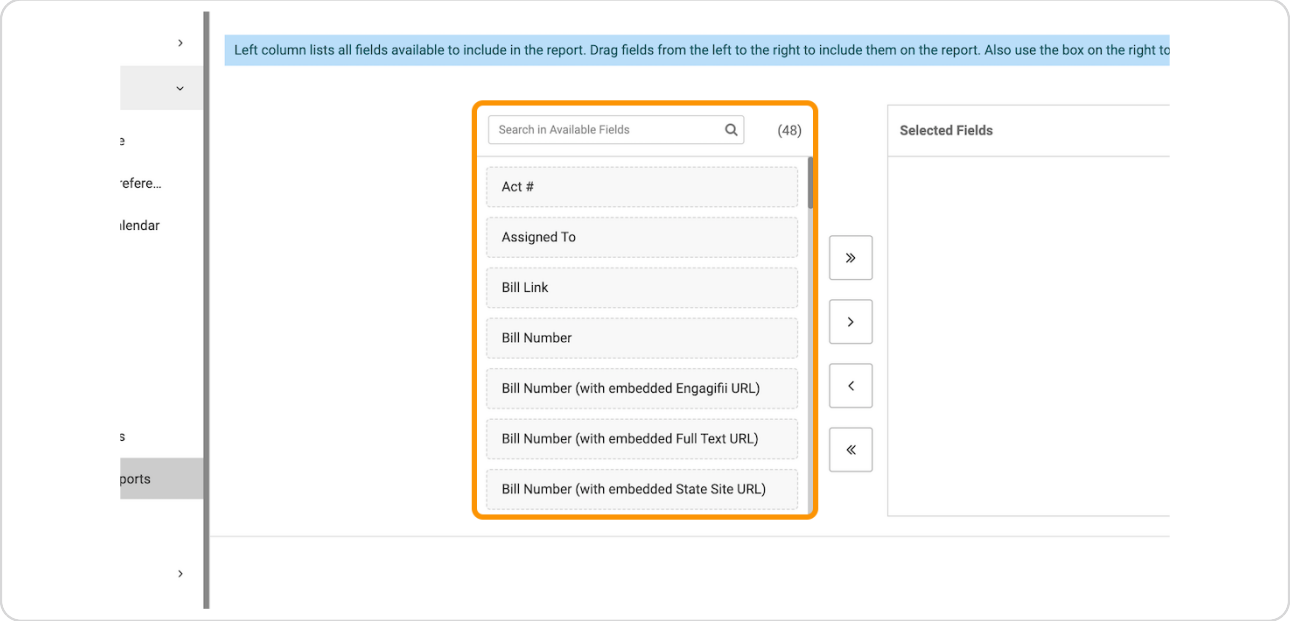
Click on Save & Next



STEP 15

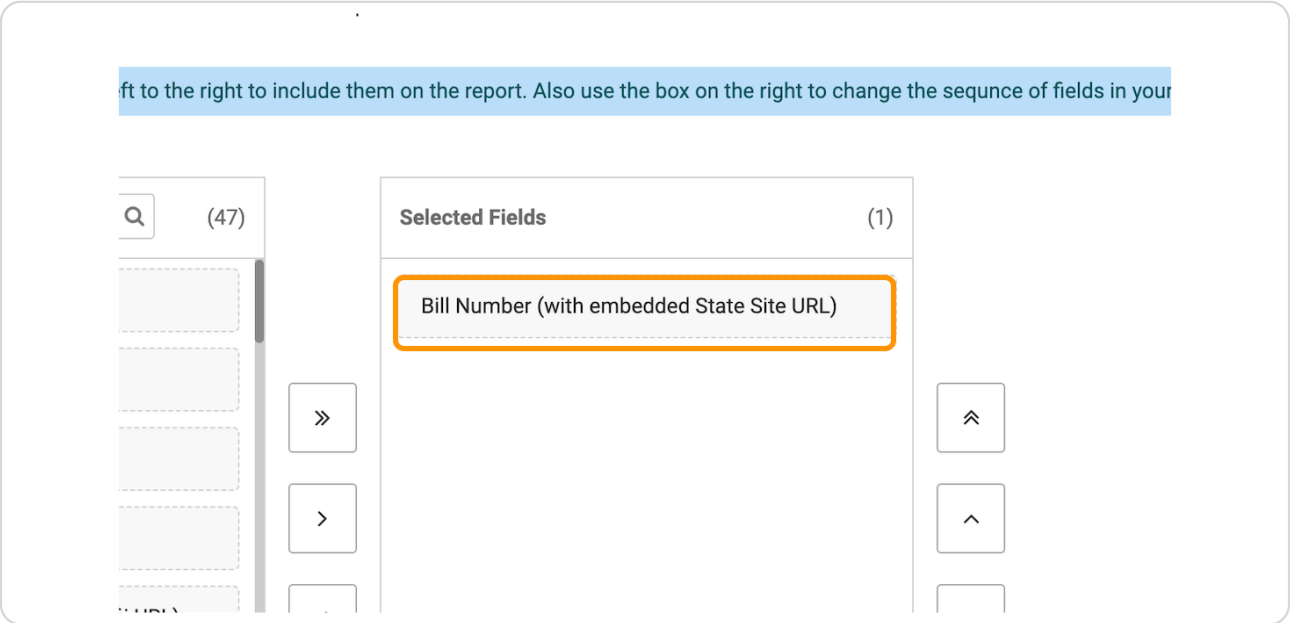
Available Fields

In the left hand box you'll find all available fields for your report



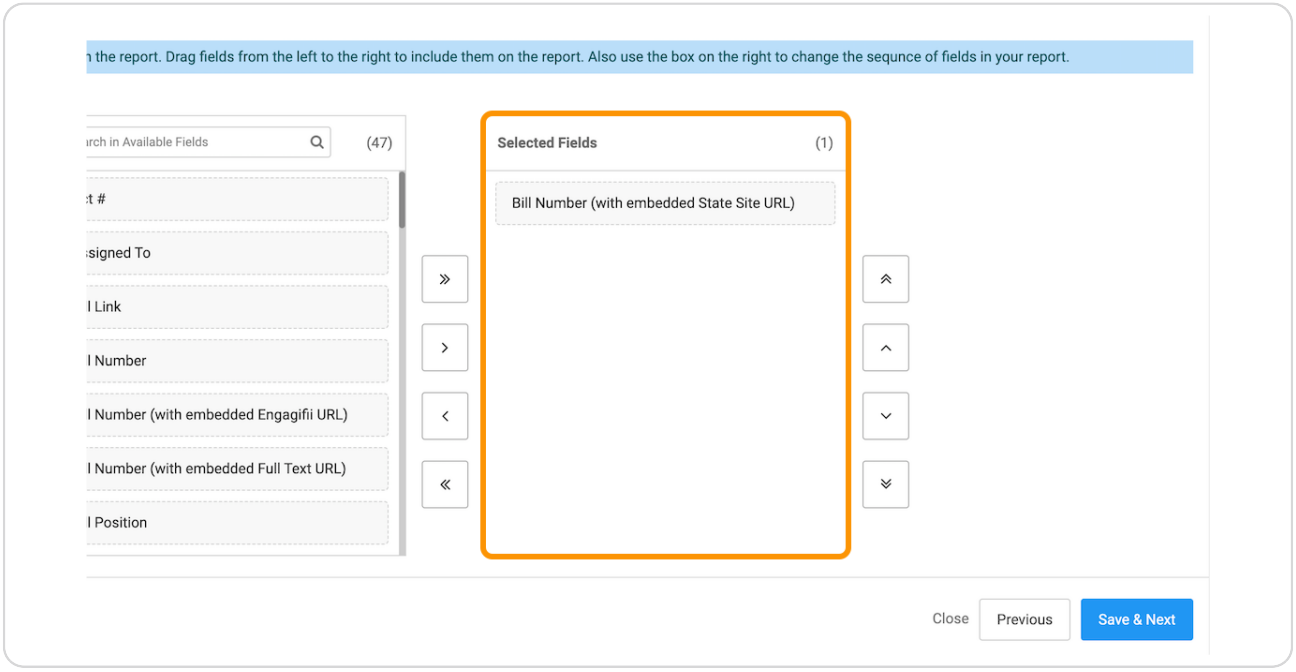
STEP 16

Click and Drag the fields you want into the right hand box labeled Selected Fields



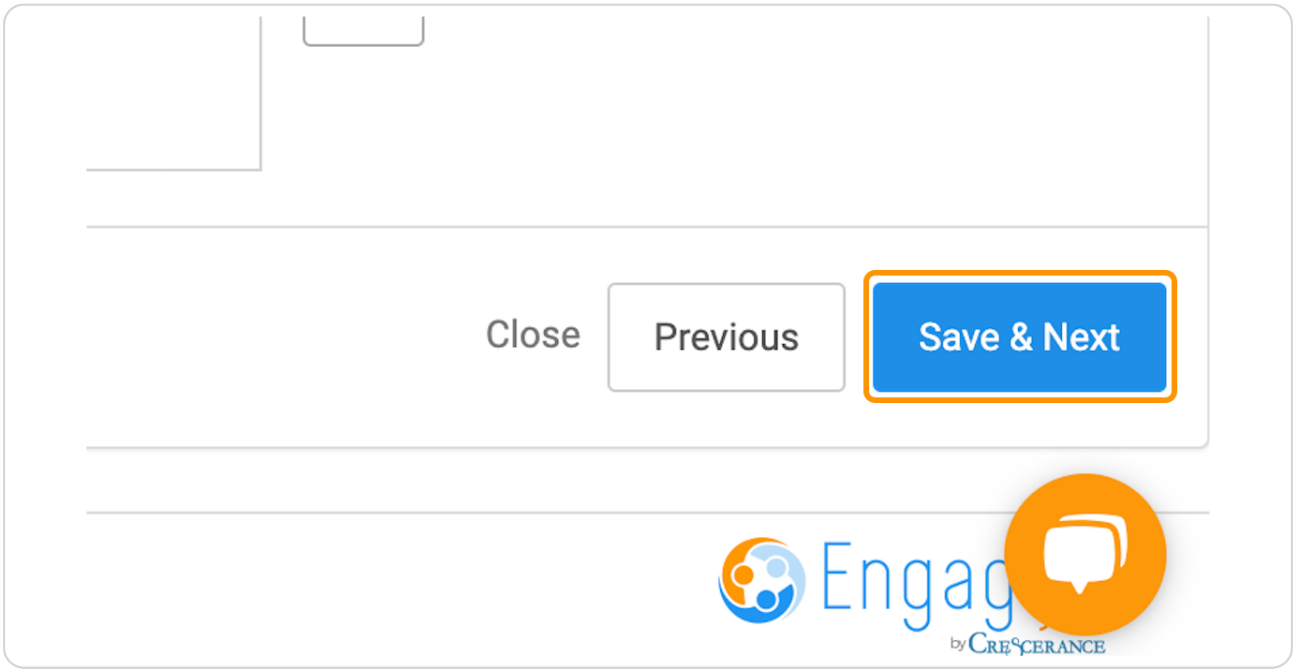
STEP 17

Click on Selected Fields...



STEP 18

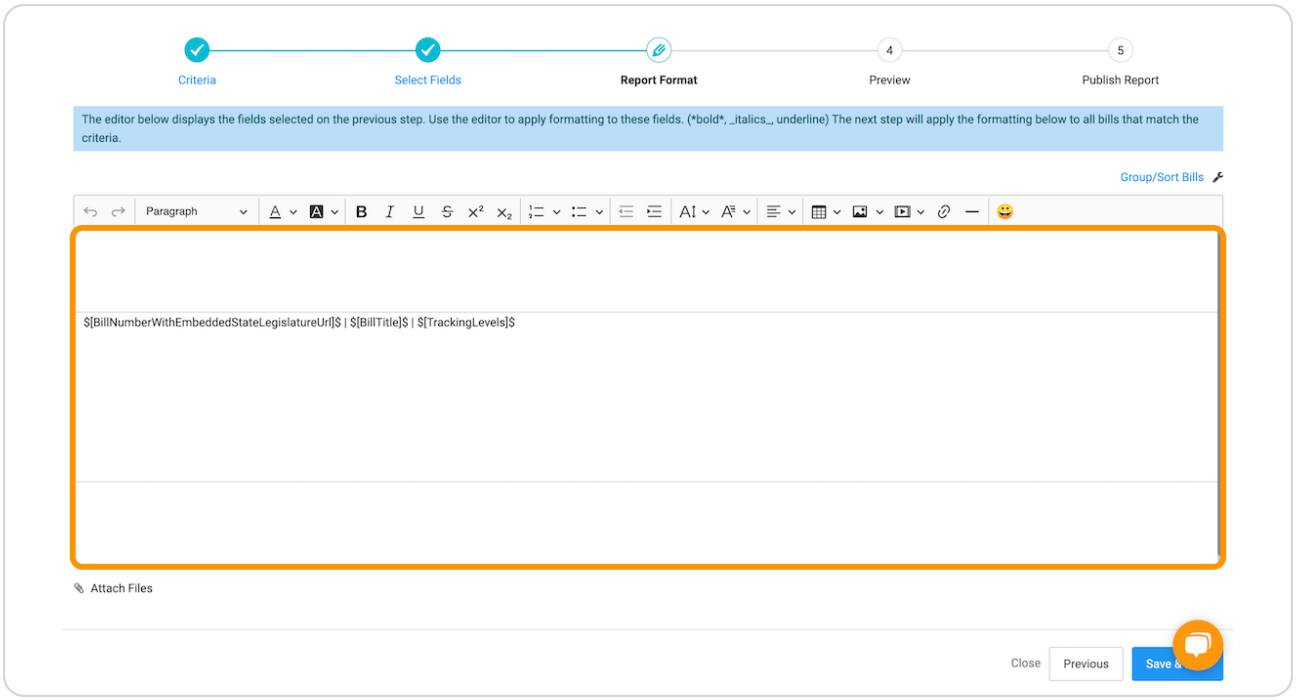
Click on Save & Next



STEP 19

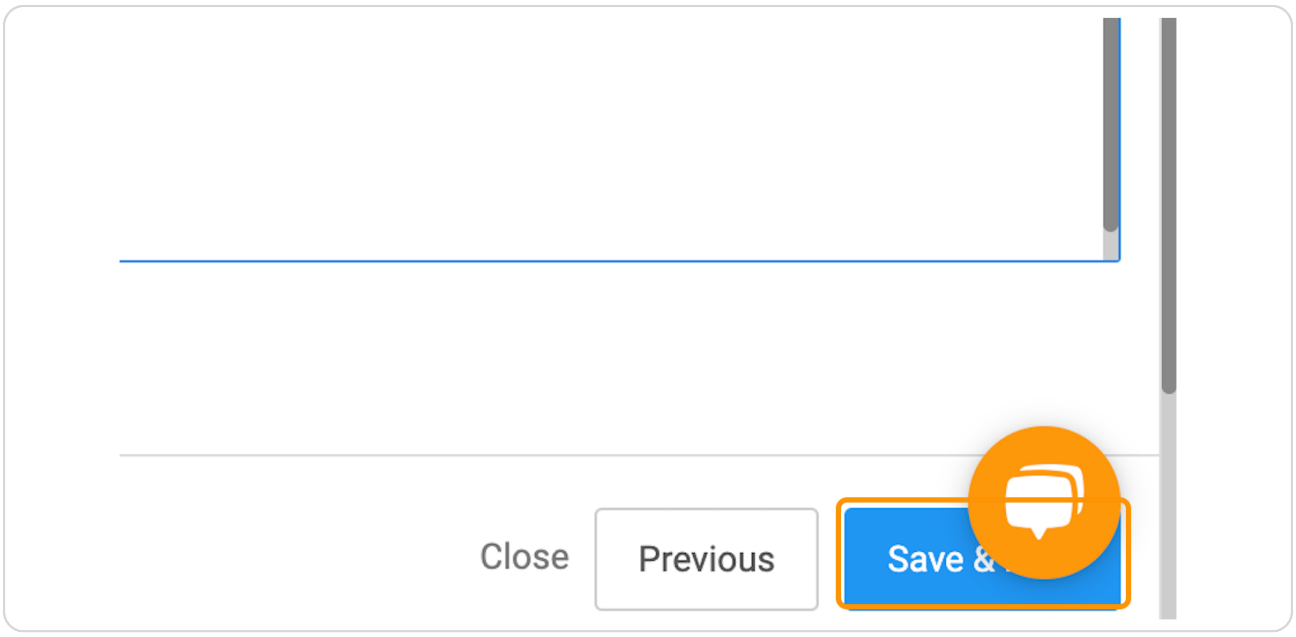
Report Format

In this screen, you'll have three different sections available for editing/formatting. The top and bottom boxes are your header and footer (think intro text or dates, and organization info). The middle section is the meat, this is where your report will be dynamically created. To format the bills, make sure you're capturing the whole short code (for example, Bill Title's short code is $[BillTitle]$).



STEP 20

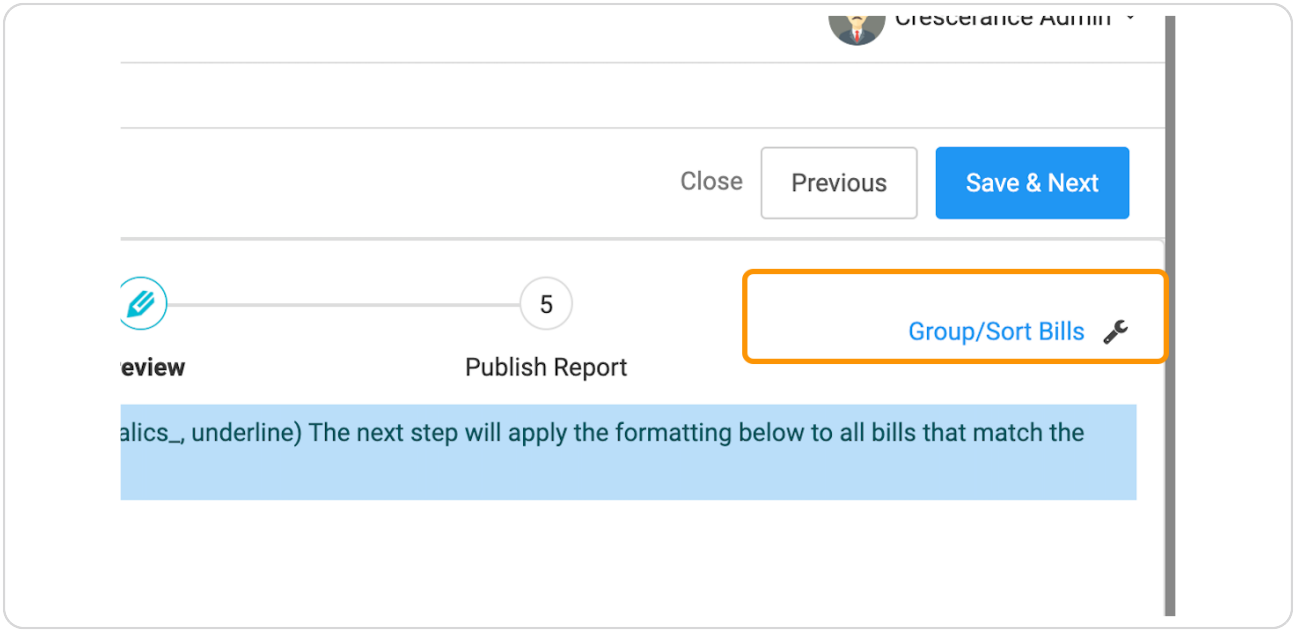
Click on Save & Next



STEP 21

Group/Sort Bills

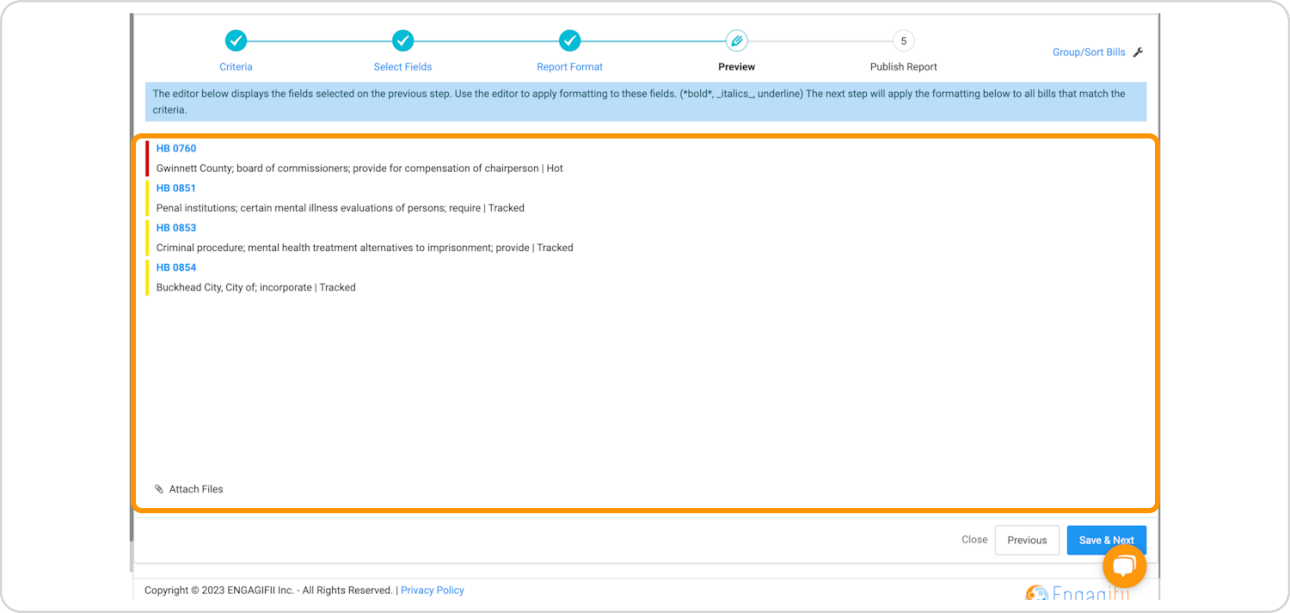
If the bills aren't in the order you'd like them to be, you have the option to group and sort them in the fashion you need



STEP 22

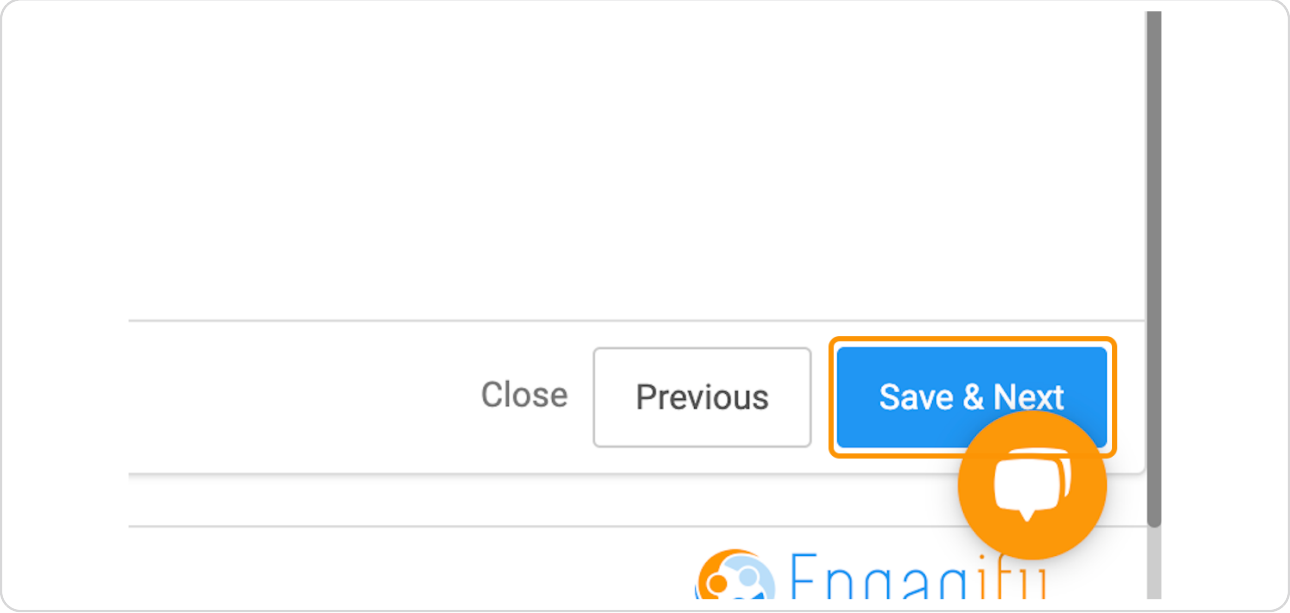
Preview Step

This is the step that you'll be able to see what your report will look like, take a look at the formatting and move back to the previous step as needed until you're happy with how it looks



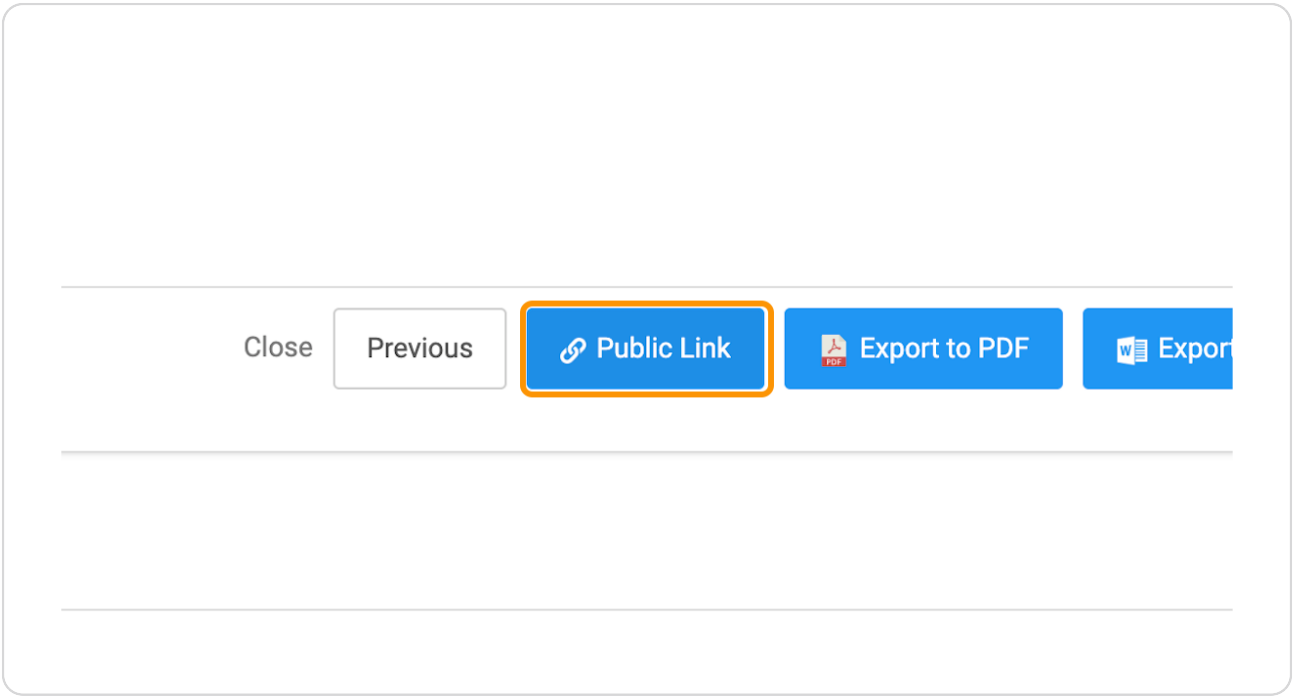
STEP 23

Click on Save & Next



STEP 24

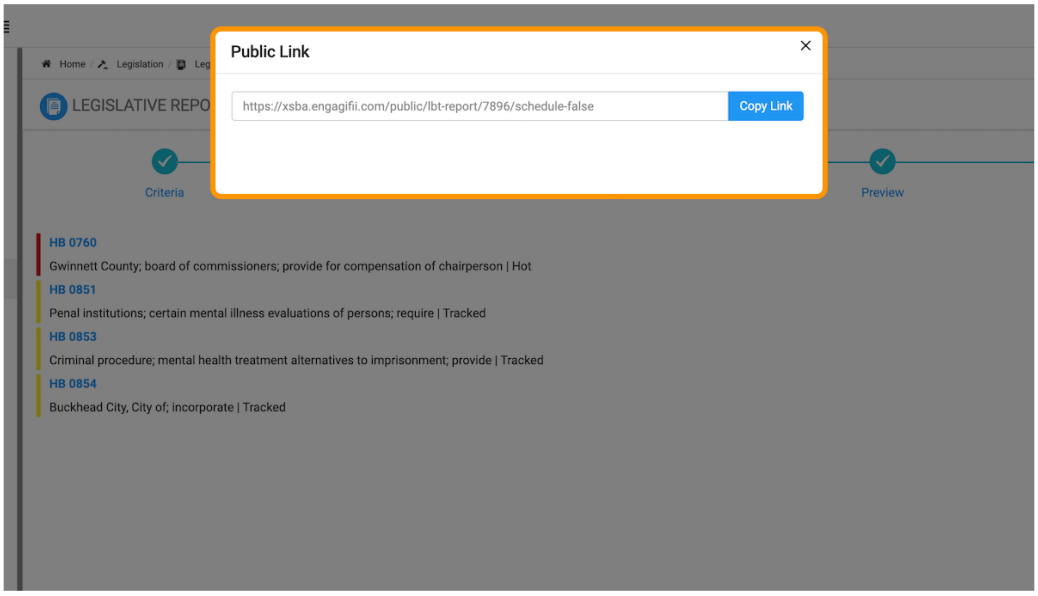
Public Link



STEP 25

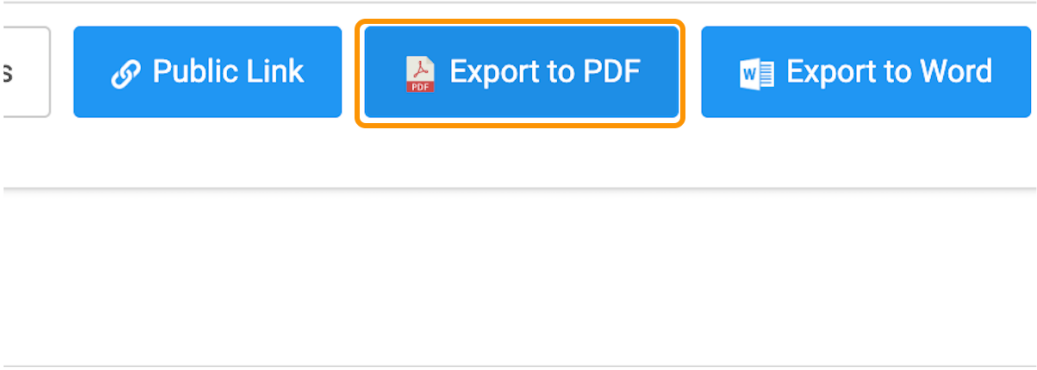
Click on Public Link...

You can share this link to anyone in or outside of the system for a public view of this report. As long as your report is dynamic, anytime this link is accessed, it will be updated with the most recent information.



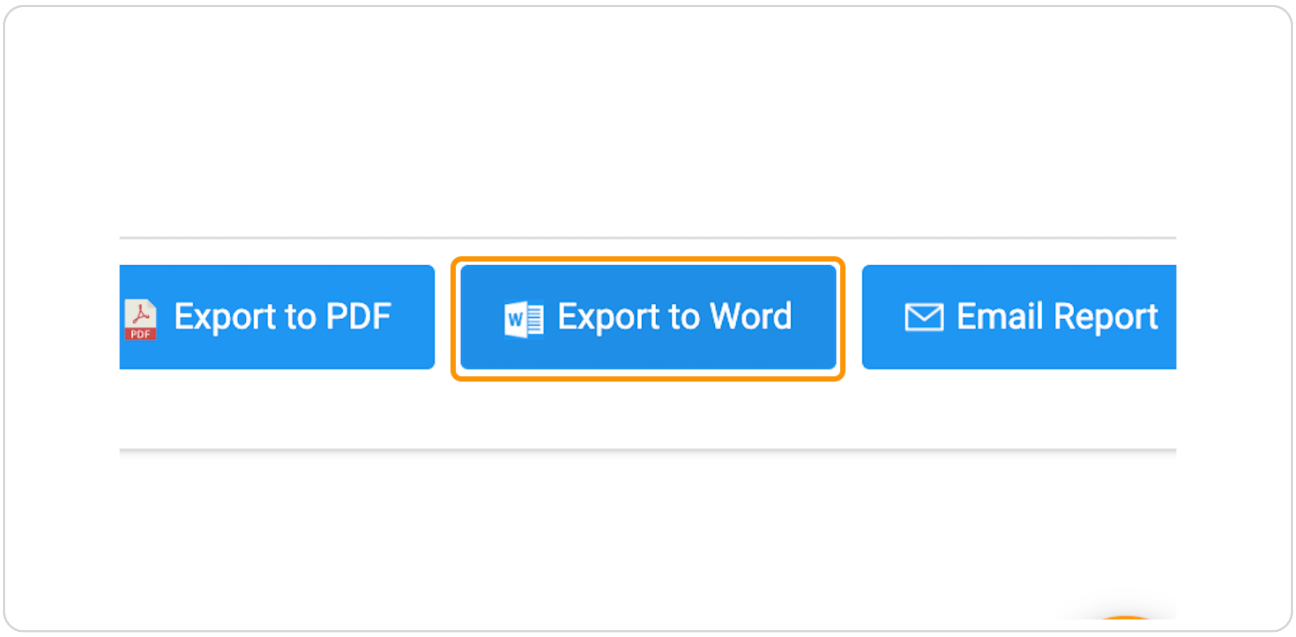
STEP 26

Export to PDF



STEP 27

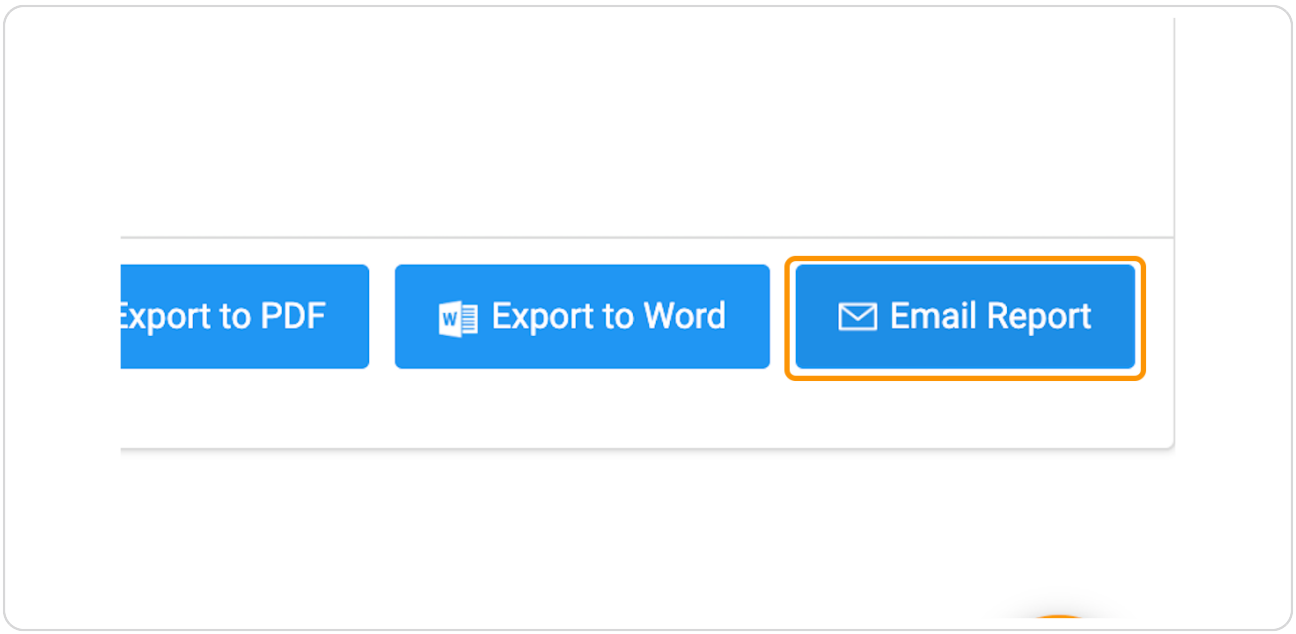
Export to Word



STEP 28

Email Report

Should you like to email the report out, ensure all intended recipients are added to the Engagifii Relationships database



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