

Creating a List Style Report

28 Steps [View most recent version](#) 

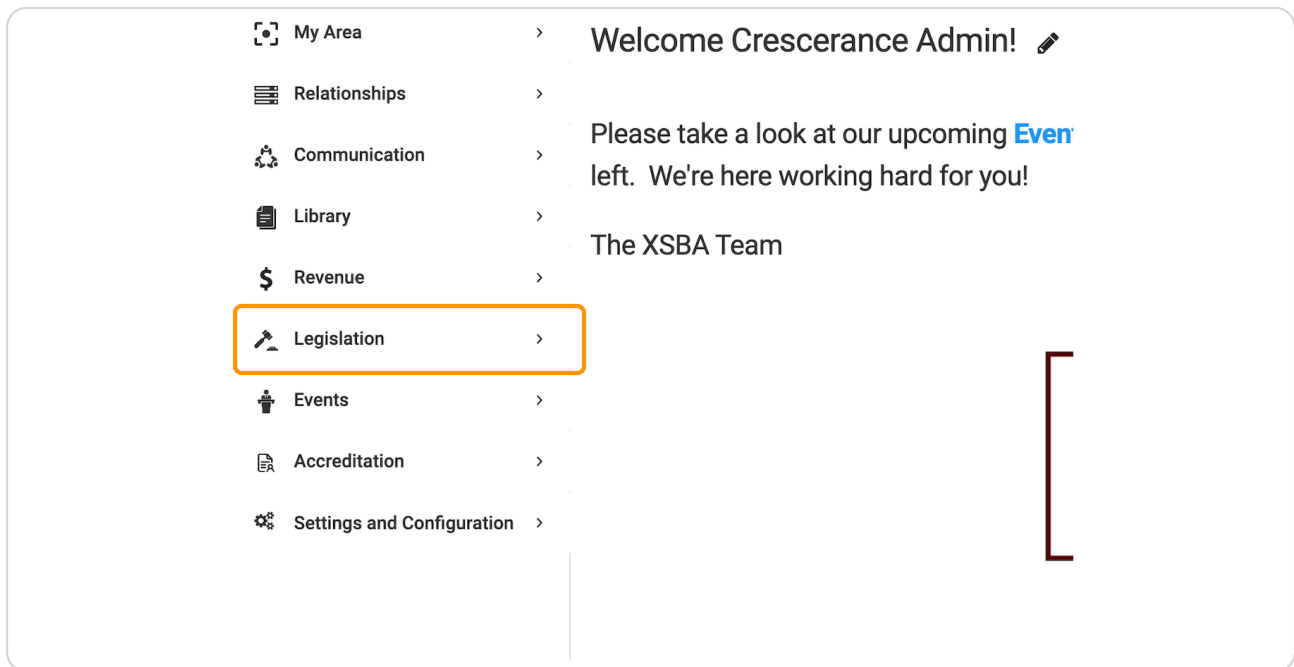
Created by
Engagifii Inc.

Creation Date
October 31, 2023

Last Updated
October 31, 2023

STEP 1

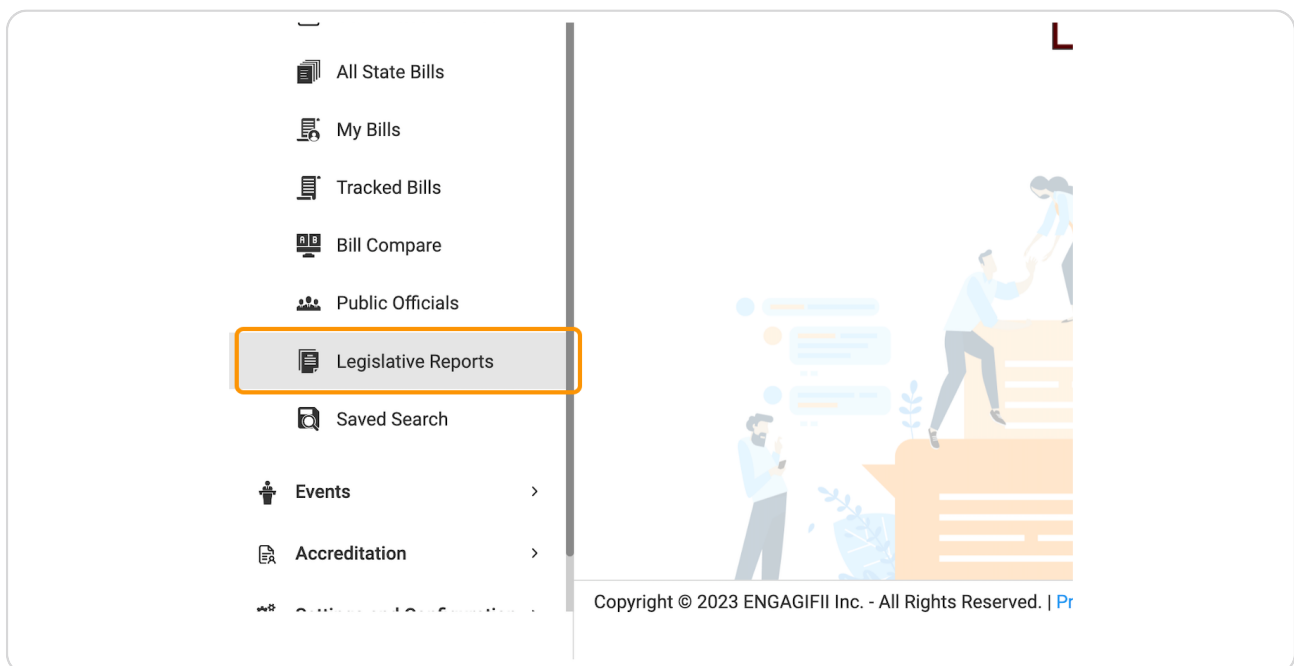
Click on Legislation



The screenshot shows a sidebar menu on the left with the following items: My Area, Relationships, Communication, Library, Revenue, Legislation (highlighted with an orange box), Events, Accreditation, and Settings and Configuration. The main content area on the right displays a welcome message: "Welcome Crescerance Admin! ✎", followed by "Please take a look at our upcoming **Even** left. We're here working hard for you!" and "The XSBA Team". A large red bracket is positioned on the right side of the main content area.

STEP 2

Click on Legislative Reports



The screenshot shows a sidebar menu on the left with the following items: All State Bills, My Bills, Tracked Bills, Bill Compare, Public Officials, Legislative Reports (highlighted with an orange box), Saved Search, Events, Accreditation, and a partially visible item at the bottom. The main content area on the right features an illustration of people working together, with a large red 'L' in the top right corner. At the bottom of the main content area, there is a copyright notice: "Copyright © 2023 ENGAGIFII Inc. - All Rights Reserved. | Pr".

STEP 3

Click on Add Report

Legislation / Legislative Reports

Reports Capitol Reports

LEGISLATIVE REPORTS Add Report

Search in Title

	Type	Last Updated
List Style Report	List/Newsletter Report	Cresceranc Oct 20, 2022
Weekly New Bills	List/Newsletter Report	Cresceranc Dec 13, 2022

STEP 4

Click on List/Newsletter Report

Legislation / Legislative Reports

Reports Capitol Reports

LEGISLATIVE REPORTS Add Report

Search in Title

- List/Newsletter Report
- Spreadsheet Report

	Type	Last Updated
List Style Report	List/Newsletter Report	Crescerance Adm Oct 20, 2023
Weekly New Bills	List/Newsletter Report	Crescerance Adm Dec 13, 2022
Augusta Hot Bills	List/Newsletter Report	Crescerance Adm Nov 11, 2022

STEP 5

Type in the name of your report

LEGISLATIVE REPORTS |

Criteria 2 Select Fields Report

Please select the criteria from below to generate a report.

Report Title * Report will include (65 matching) Tracked bills

Report Name

Include Untracked Bills

Criteria

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

Legislation

2023 Schedule

Notification Prefere...

Committee Calendar

All State Bills

My Bills

Tracked Bills

Report Title * Report will include (65 matching) Tracked bills

Report Name

Include Untracked Bills

Criteria

STEP 7

Adding your Criteria

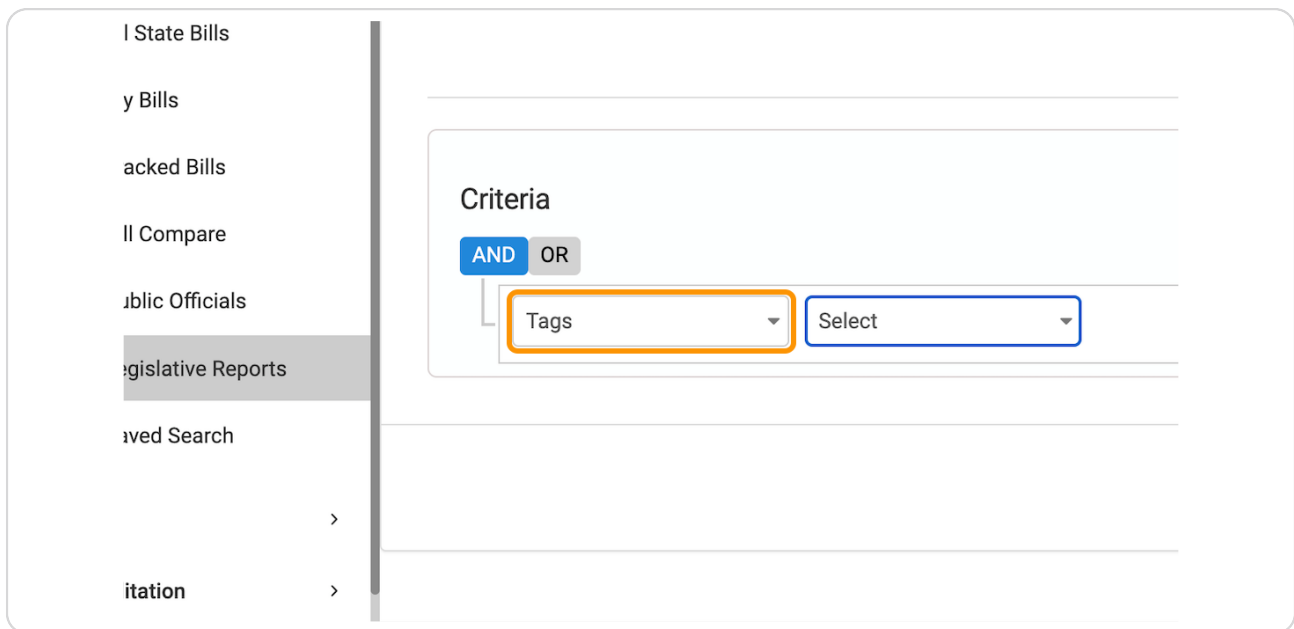
Once you've toggled Criteria to on, you'll see a criteria builder pop up below

The screenshot displays a multi-step process for creating a report. At the top, a progress bar shows five steps: 1. Criteria (active), 2. Select Fields, 3. Report Format, 4. Preview, and 5. Publish Report. Below the progress bar, a blue instruction bar reads: "Please select the criteria from below to generate a report." The main form area includes a "Report Title" field with a red asterisk and a note: "Report will include (65 matching) Tracked bills". Below this is a "Report Name" input field. There are two toggle options: "Include Untracked Bills" (disabled) and "Criteria" (enabled, indicated by a green checkmark). A "Reset" button is located on the right side. The "Criteria" section is highlighted with an orange border and contains a logic builder with "AND" and "OR" options, two "Select" dropdown menus, and "Add Rule Set" and "Add Rule" buttons. At the bottom right of the form is a "Save & Next" button. The footer contains the copyright notice "copyright © 2023 ENGAGIFII Inc. - All Rights Reserved. | Privacy Policy" and the Engagifii logo.

STEP 8

Select your Criteria

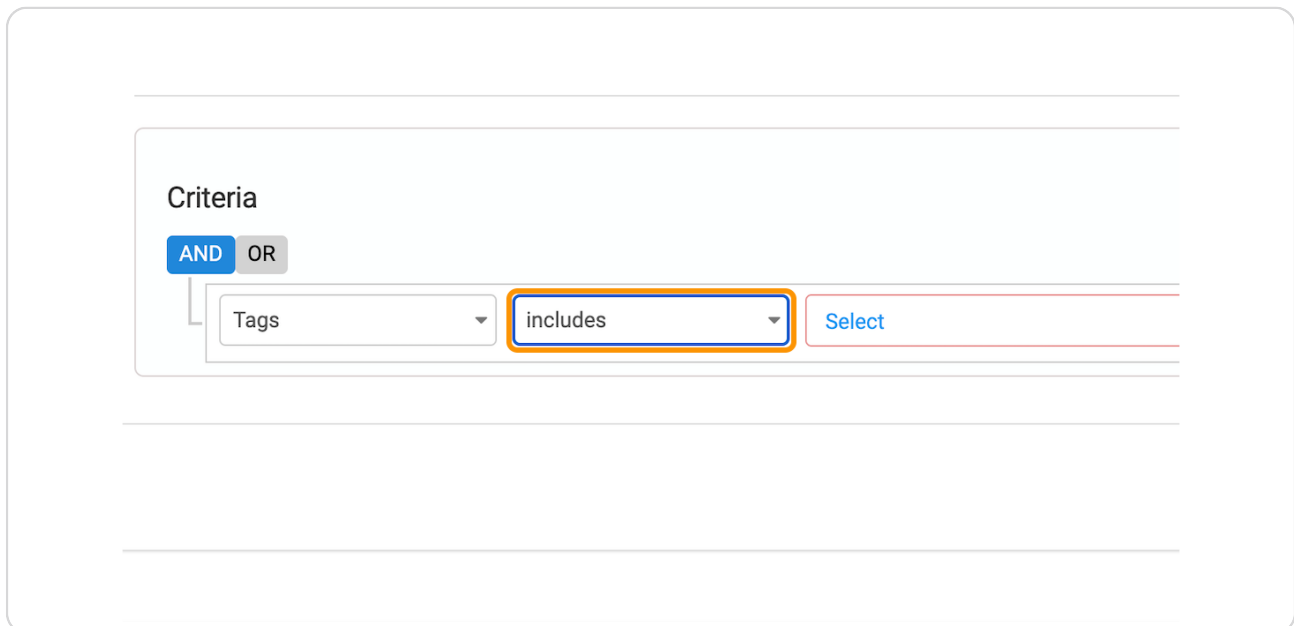
In the example below, we'll be using Tags as our criteria, but there are many options available.



The screenshot shows a search interface with a sidebar on the left and a main content area on the right. The sidebar contains a list of categories: "All State Bills", "My Bills", "Unacknowledged Bills", "All Compare", "Public Officials", "Legislative Reports" (highlighted), "Advanced Search", and "Citation". The main content area has a "Criteria" section with two buttons: "AND" (highlighted in blue) and "OR" (grey). Below these buttons is a dropdown menu with "Tags" selected and highlighted with an orange border. To the right of the dropdown is another dropdown menu with "Select" highlighted in blue.

STEP 9

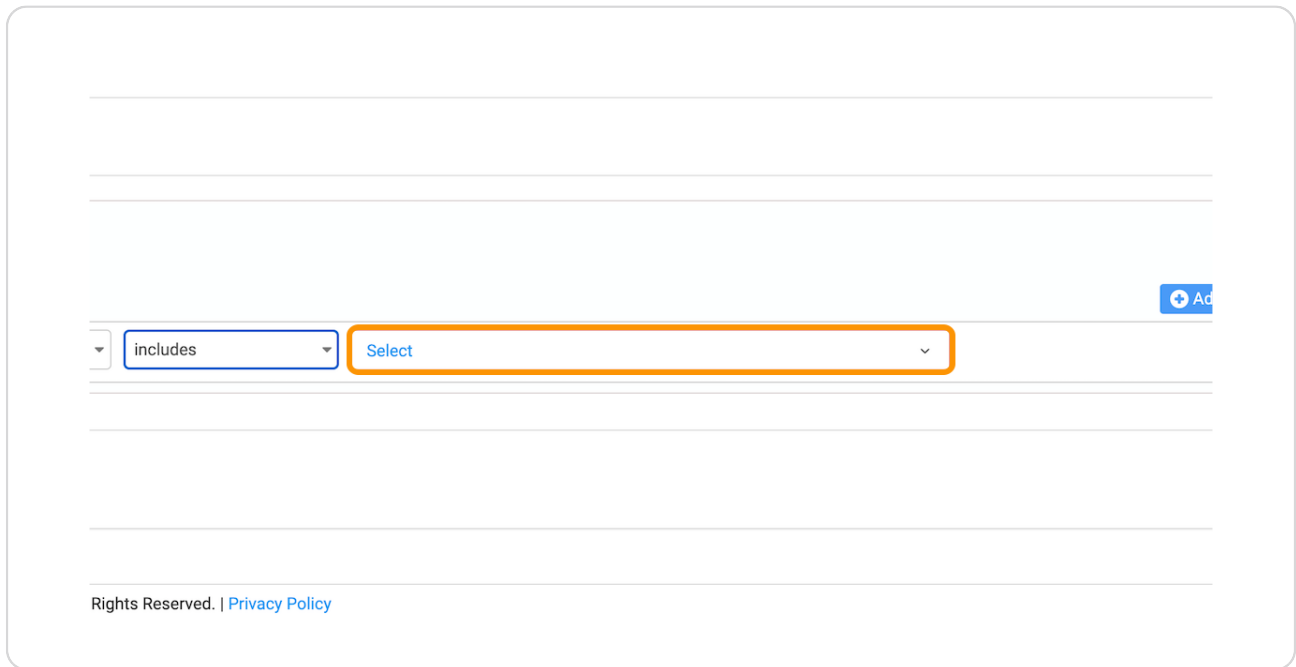
Select includes



The screenshot shows a search interface similar to the previous one. The "Criteria" section has the "AND" button highlighted in blue. The dropdown menu to the left of the "includes" dropdown is set to "Tags". The "includes" dropdown menu is highlighted with an orange border and shows the word "includes" selected. To the right of the "includes" dropdown is a "Select" button highlighted in blue.

STEP 10

Click on Select



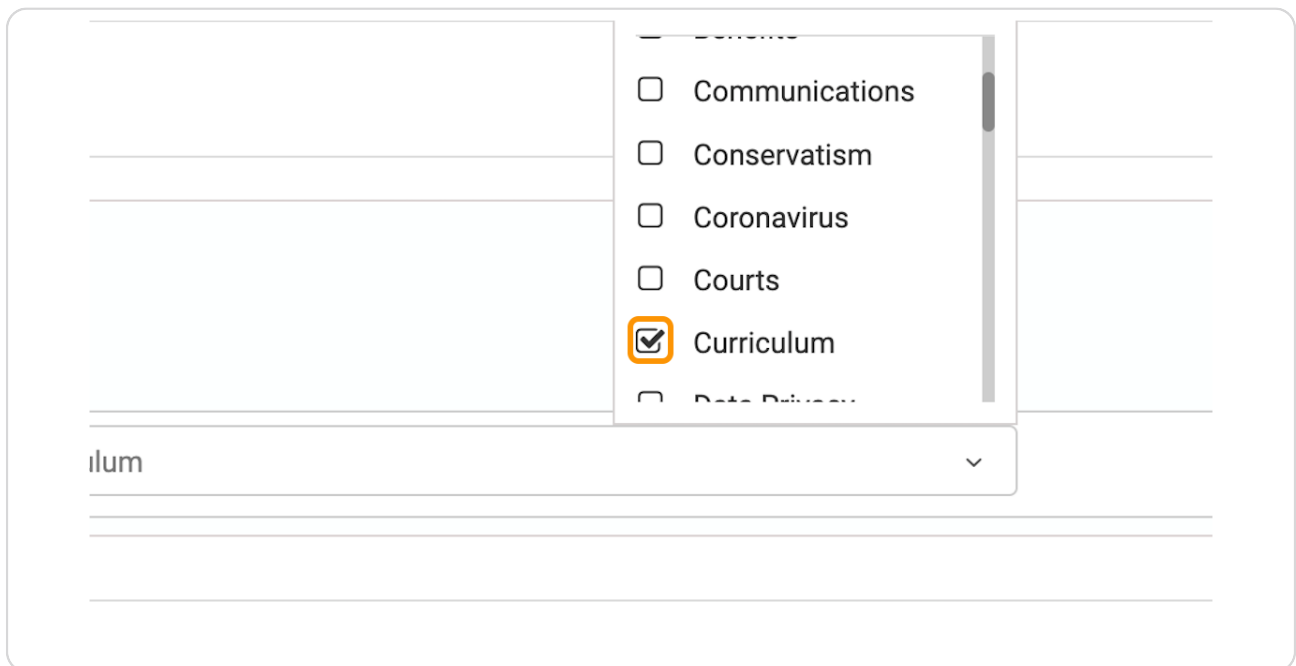
includes Select

+ Add

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STEP 11

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



- Communications
- Conservatism
- Coronavirus
- Courts
- Curriculum
- Data Privacy

Curriculum

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.

The screenshot displays the 'Criteria' step of a report creation process. At the top, a progress bar shows five steps: 1. Criteria (active), 2. Select Fields, 3. Report Format, 4. Preview, and 5. Publish. Below the progress bar, a blue banner reads 'Please select the criteria from below to generate a report.' The main area contains a 'Report Title' field with a red asterisk and a subtext 'Report will include (4 matching) Tracked bills'. Below this is a 'Report Name' input field. There are two toggle switches: 'Include Untracked Bills' (disabled) and 'Criteria' (enabled). A 'Criteria' section is highlighted with an orange border, containing a dropdown menu with 'AND' and 'OR' options, a text input field with 'includes', and another dropdown menu with 'Curriculum'. An 'Add Rule Set' button is to the right. A 'Close' button is at the bottom right. The footer includes 'Copyright © 2023 ENGAGIFII Inc. - All Rights Reserved. | Privacy Policy' and the Engagifii logo.

STEP 13

Add Additional Rule Sets or Rules

Reset

+ Add Rule Set + Add Rule

Delete

Delete

STEP 14

Click on Save & Next

Close Save & Next

Engagifii

STEP 15

Available Fields

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

Left column lists all fields available to include in the report. Drag fields from the left to the right to include them on the report. Also use the box on the right to...

Search in Available Fields (48)

- Act #
- Assigned To
- Bill Link
- Bill Number
- Bill Number (with embedded Engagifii URL)
- Bill Number (with embedded Full Text URL)
- Bill Number (with embedded State Site URL)

Selected Fields

STEP 16

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

Left column lists all fields available to include in the report. Drag fields from the left to the right to include them on the report. Also use the box on the right to change the sequence of fields in your...

Search (47)

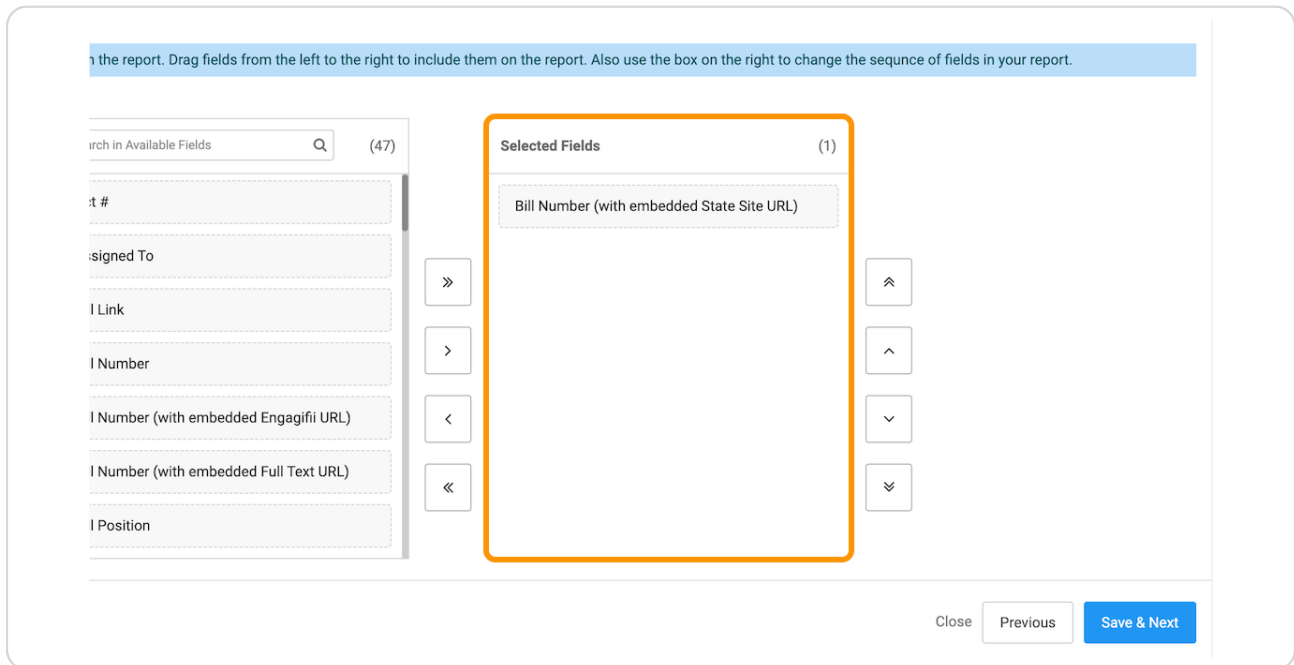
Selected Fields (1)

- Bill Number (with embedded State Site URL)

STEP 17

Click on Selected Fields...

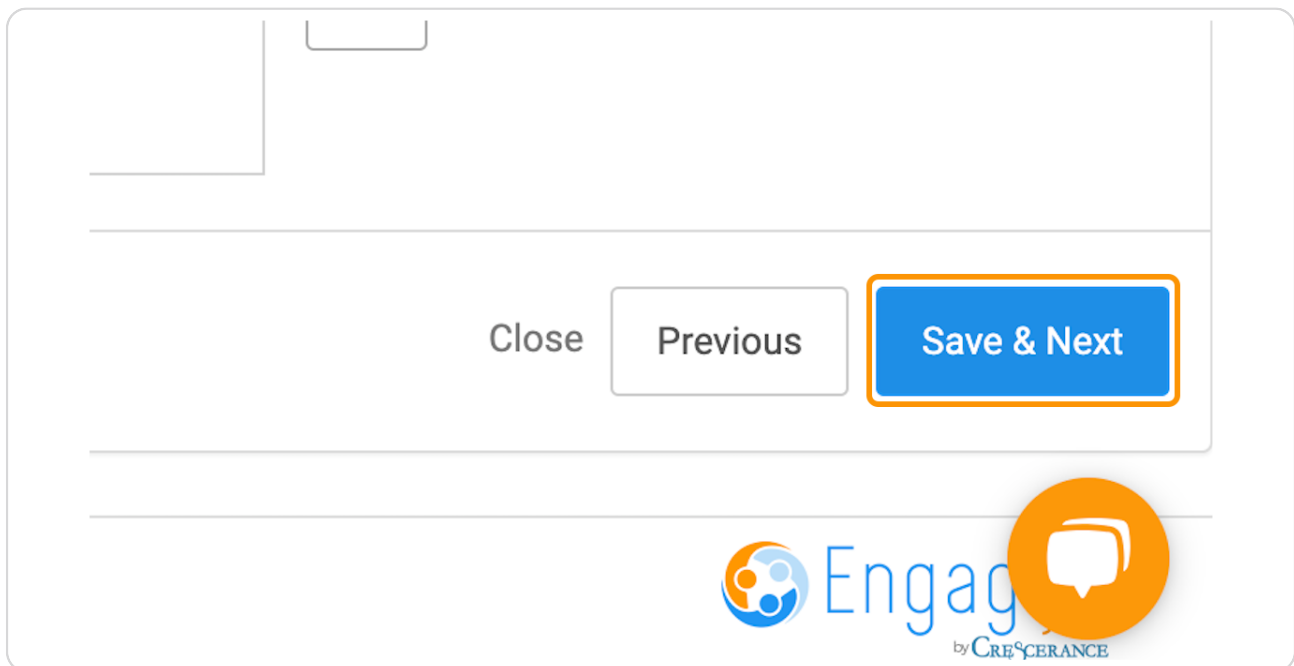
in the report. Drag fields from the left to the right to include them on the report. Also use the box on the right to change the sequence of fields in your report.



The screenshot shows a configuration interface for a report. On the left, there is a search bar labeled "Search in Available Fields" with a magnifying glass icon and a count of "(47)". Below the search bar is a list of available fields: "Bill #", "Signed To", "Bill Link", "Bill Number", "Bill Number (with embedded Engagifii URL)", "Bill Number (with embedded Full Text URL)", and "Bill Position". To the right of this list are navigation arrows: a double right arrow, a single right arrow, a single left arrow, and a double left arrow. In the center, there is a box titled "Selected Fields" with a count of "(1)". This box contains one field: "Bill Number (with embedded State Site URL)". To the right of the "Selected Fields" box are navigation arrows: a double up arrow, a single up arrow, a single down arrow, and a double down arrow. At the bottom right of the interface, there are three buttons: "Close", "Previous", and "Save & Next". The "Save & Next" button is highlighted with an orange border.

STEP 18

Click on Save & Next



The screenshot shows the same configuration interface as in Step 17, but with a focus on the bottom right. The "Close", "Previous", and "Save & Next" buttons are visible. The "Save & Next" button is highlighted with an orange border. Below the buttons, the Engagifii logo is displayed, which consists of a blue circle with three white dots and the text "Engagifii by CRESCERANCE".

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}\$).

Criteria Select Fields **Report Format** Preview Publish Report

The editor below displays the fields selected on the previous step. Use the editor to apply formatting to these fields. (*bold*, _italics_, underline) The next step will apply the formatting below to all bills that match the criteria.

Group/Sort Bills

Paragraph Paragraph

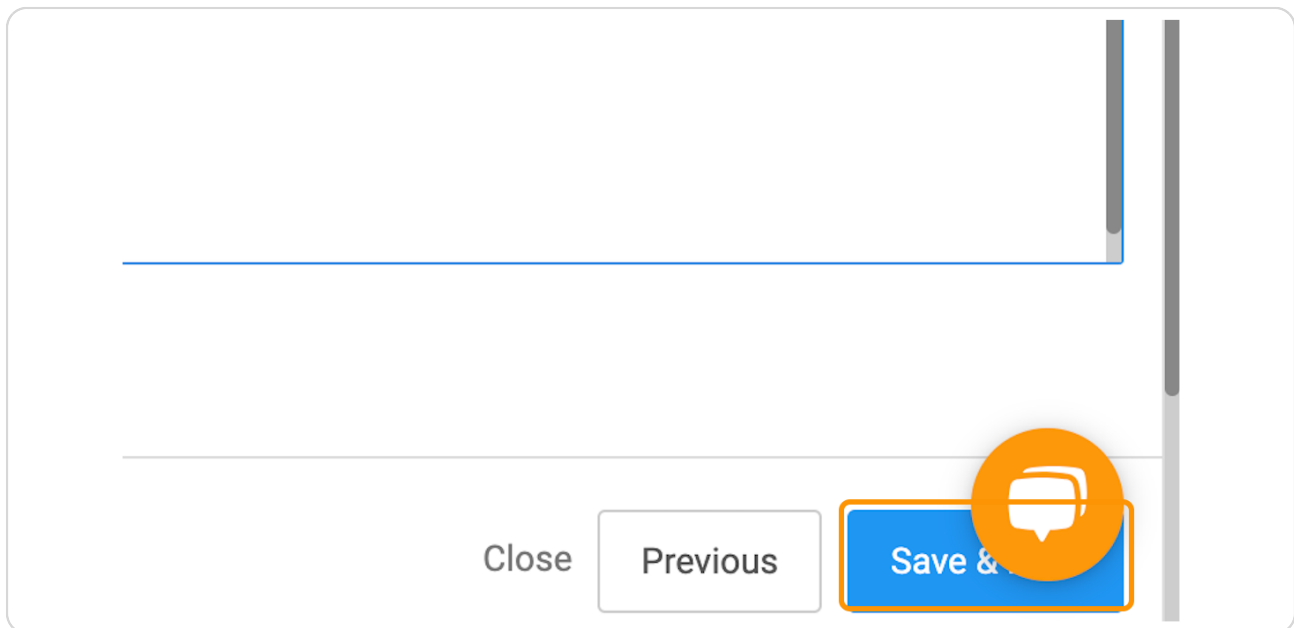
`${BillNumberWithEmbeddedStateLegislatureUri}$ | ${BillTitle}$ | ${TrackingLevels}$`

Attach Files

Close Previous Save & Next

STEP 20

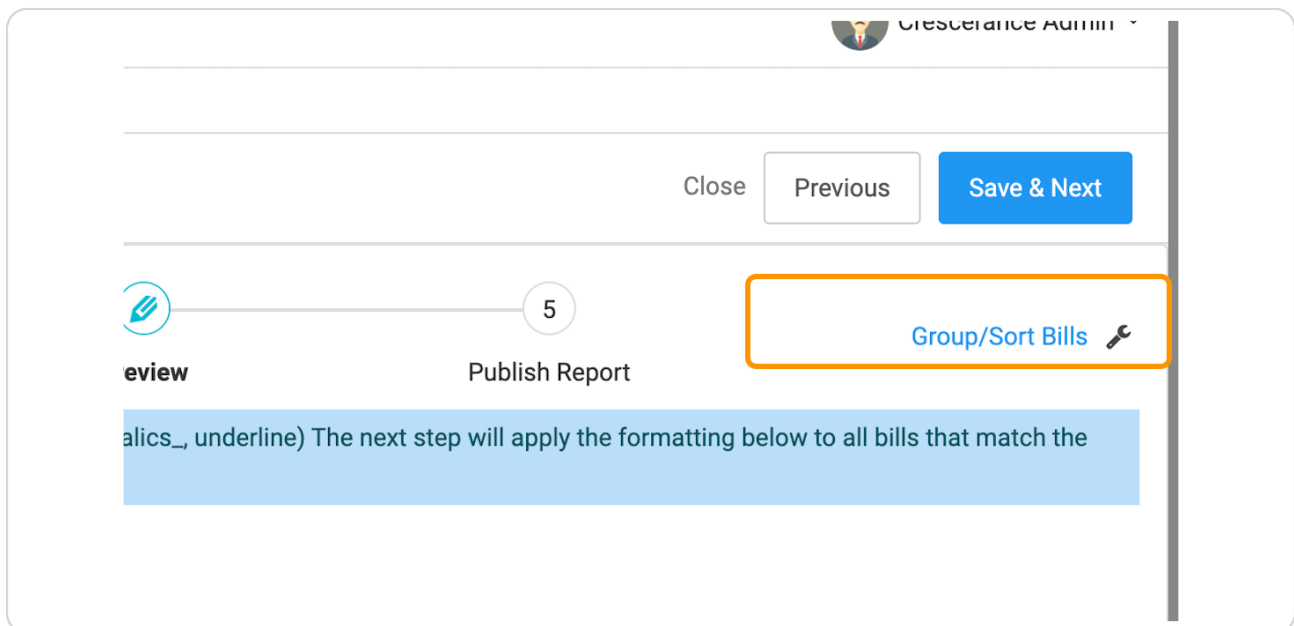
Click on Save & Next



STEP 21

Group/Sort Bills

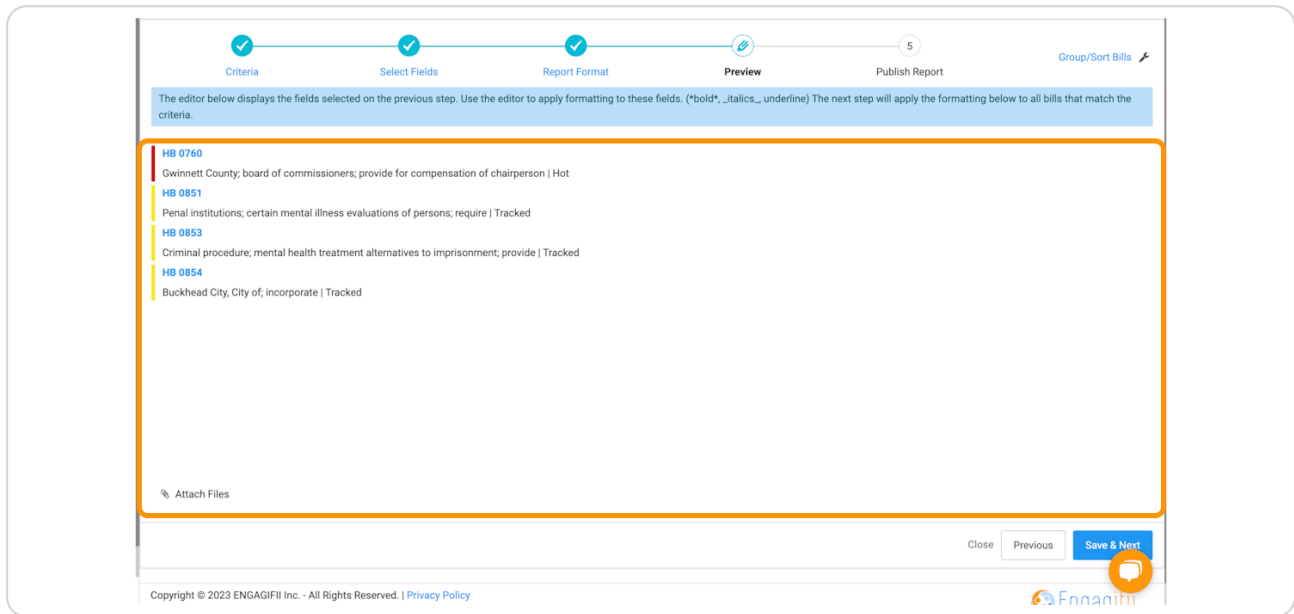
If the bills aren't in the order you'd like them to be, you have the option to group and sort them in the fashion you need



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



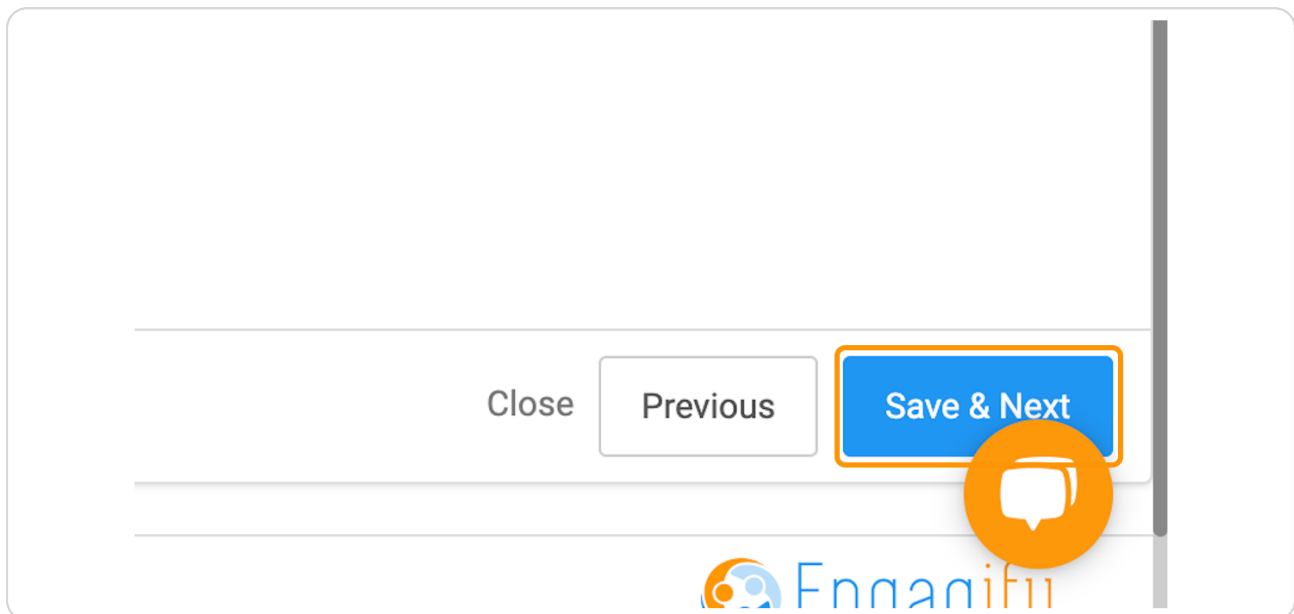
The screenshot shows a multi-step workflow interface. At the top, a progress bar indicates five steps: 'Criteria', 'Select Fields', 'Report Format', 'Preview', and 'Publish Report'. The 'Preview' step is currently active, indicated by a blue circle with a pencil icon. Below the progress bar, a blue banner contains instructions: 'The editor below displays the fields selected on the previous step. Use the editor to apply formatting to these fields. (*bold*, _italics_, underline) The next step will apply the formatting below to all bills that match the criteria.' The main content area is a large white box with an orange border, containing a list of bills with their titles and status:

- HB 0760**
Gwinnett County, board of commissioners; provide for compensation of chairperson | Hot
- HB 0851**
Penal institutions; certain mental illness evaluations of persons; require | Tracked
- HB 0853**
Criminal procedure; mental health treatment alternatives to imprisonment; provide | Tracked
- HB 0854**
Buckhead City, City of; incorporate | Tracked

At the bottom left of the content area is an 'Attach Files' button. At the bottom right, there are three buttons: 'Close', 'Previous', and 'Save & Next'. The 'Save & Next' button is highlighted with an orange circle and a white speech bubble icon. The footer of the interface includes the copyright notice 'Copyright © 2023 ENGAGIFII Inc. - All Rights Reserved. | Privacy Policy' and the Engagifii logo.

STEP 23

Click on Save & Next



This is a close-up screenshot of the bottom right corner of the interface. It shows three buttons: 'Close', 'Previous', and 'Save & Next'. The 'Save & Next' button is a blue rectangle with white text, highlighted with an orange border and an orange circle containing a white speech bubble icon. The 'Previous' button is a white rectangle with a grey border and grey text. The 'Close' button is a white rectangle with a grey border and grey text. The Engagifii logo is visible at the bottom center of the image.

STEP 24

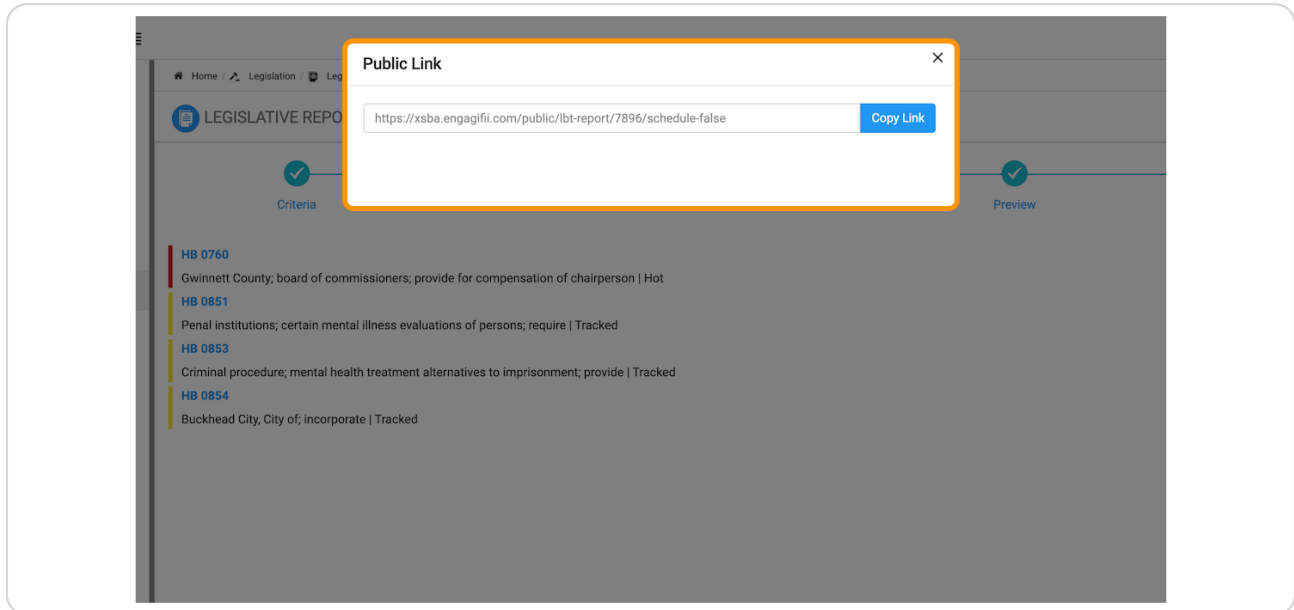
Public Link

Close Previous **Public Link** Export to PDF Export

STEP 25

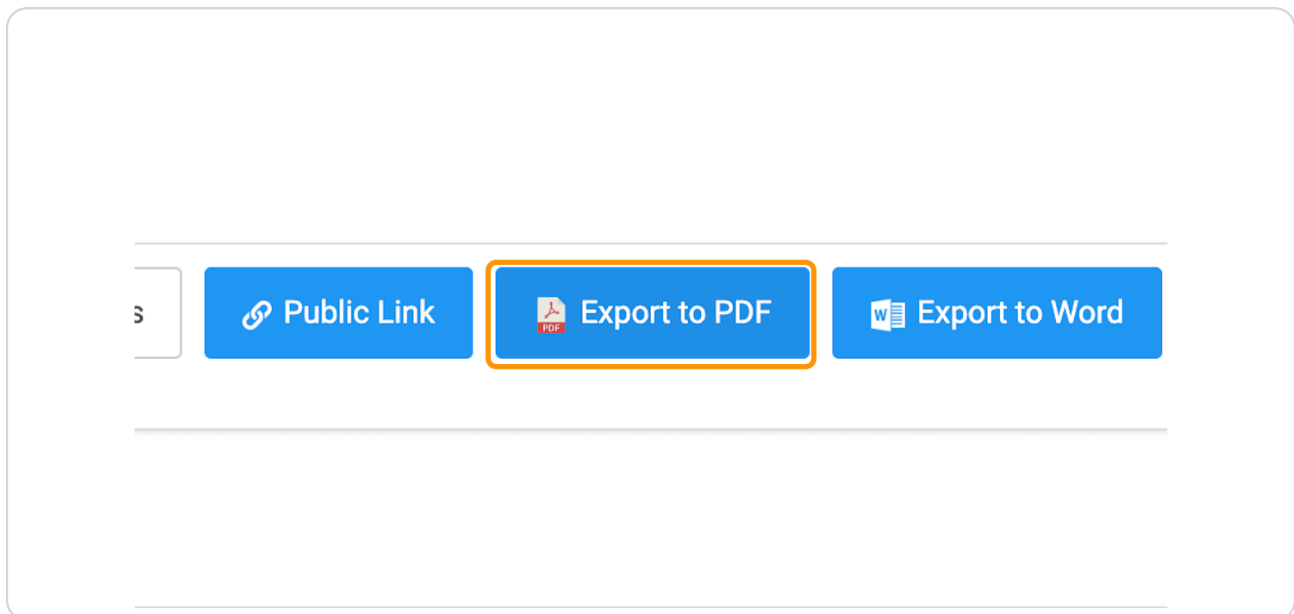
Click on Public Link...

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.



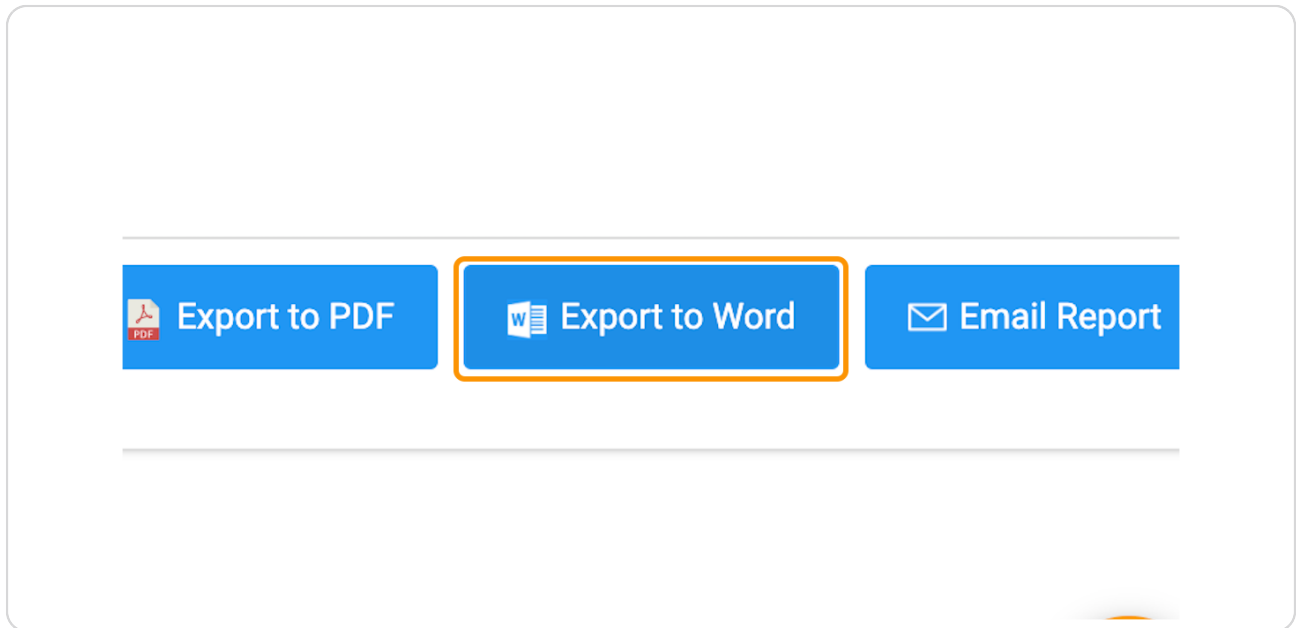
STEP 26

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

