

Staff Report Menu

Open the Report Menu in Data Services

The screenshot shows the Data Services interface with a blue header. Below the header, there are several buttons: 'Select Page' (dropdown), 'Lay Servant Report', 'Church Account Mgmt', 'Tables (EOY) Mgmt', 'Tables (EOY) Review', 'Financial Support List', and 'Report Menu'. The 'Report Menu' button is highlighted with a red box.

For the Reports and Grids on the left, which include –

Church Data
Clergy Appointments
Clergy Data
Mail Chimp (Clergy Cleaned)
Mail Chimp (Clergy Subscribed)
Mail Chimp (Clergy Unsubscribed)
Stats Data
Surviving Spouse

The screenshot shows the Data Services interface with a blue header. Below the header, there are two main sections: 'Report Dates' and 'Reports and Grids'. The 'Reports and Grids' section is highlighted with a red box. It contains a list of reports: Church Data, Clergy Appointments, Clergy Data, Mail Chimp (Clergy Cleaned), Mail Chimp (Clergy Subscribed), Mail Chimp (Clergy Unsubscribed), Stats Data, and Surviving Spouse. To the right is a 'Report Catalog' section with a 'View' button and a list of reports: Apportionments Notice, Chrono AM, Church Labels - Avery 5160, Churches - New Districts, Clergy Address and Status, Clergy Birthdays, Clergy Directory, Clergy Labels - Avery 5160, and Clergy Retired.

Sort the data by clicking the column headers in the column you want to sort by, click again to reverse the sort.

Search and filter using the empty cells in the top row. Click the pin to change your search operators.

The screenshot shows a 'Church Data' grid for 07/22/2021. The grid has columns: #, Account: Dst, Account: Num, Account: Name, Account: Charg, Mail: Address, Mail: Address2, Mail: City, Mail: State, and Mail: Zip. A 'Column Chooser' dropdown is open over the 'Account: Dst' column, showing operators: Begins with, Contains, Doesn't contain, Ends with, Equals, and Doesn't equal. The dropdown is highlighted with a red box.

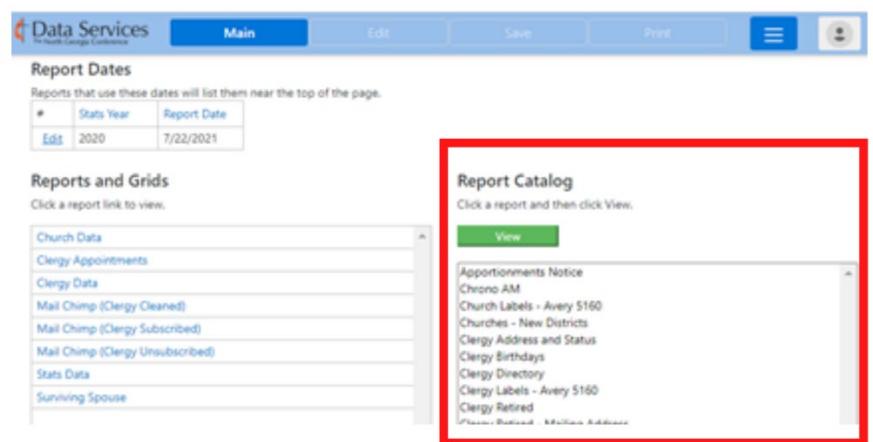
The Church Data, Clergy Data, and Stats Data reports include a column chooser option. To use, click “**Column Chooser**” in the top left. drag desired columns from the pop-up box into the header row, drag columns out of the header row to remove.

The screenshot shows a 'Statistical Data' grid for the current quad 2017 - 2020. The grid has columns: #, YEAR, CHKEY, DST, Current, Dist, and CHNAME. A 'Column Chooser' dropdown is open over the 'DST' column, showing operators: Begins with, Contains, Doesn't contain, Ends with, Equals, and Doesn't equal. The dropdown is highlighted with a red box. To the right, a 'Column Chooser' sidebar is open, showing columns: 02a, 02b, 02c, and 02d. The sidebar is also highlighted with a red box.

Staff Report Menu

For the Report Catalog on the right, which includes -

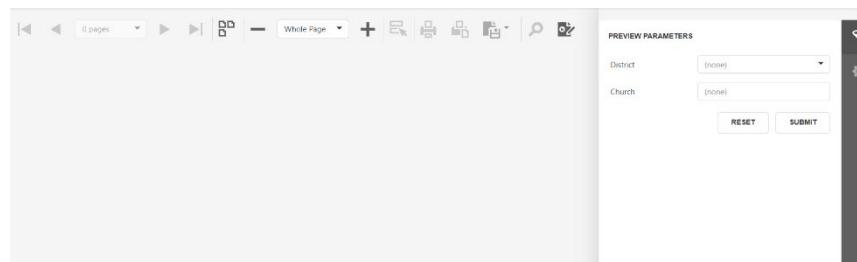
Apportionments Notice
 Chrono AM
 Church Labels - Avery 5160
 Churches - New Districts
 Clergy Address and Status
 Clergy Birthdays
 Clergy Directory
 Clergy Labels - Avery 5160
 Clergy Retired
 Clergy Retired - Mailing Address
 Journal Ext Min Comp
 Journal Lay Leaders
 Journal Surviving Spouse
 Journal Lay Members
 Journal Leadership
 Lay Delegates
 Leadership Lists



The screenshot shows the Data Services interface with a 'Report Catalog' section highlighted by a red box. The catalog lists various reports including 'Apportionments Notice', 'Chrono AM', 'Church Labels - Avery 5160', 'Churches - New Districts', 'Clergy Address and Status', 'Clergy Birthdays', 'Clergy Directory', 'Clergy Labels - Avery 5160', and 'Clergy Retired'. A green 'View' button is visible above the list.

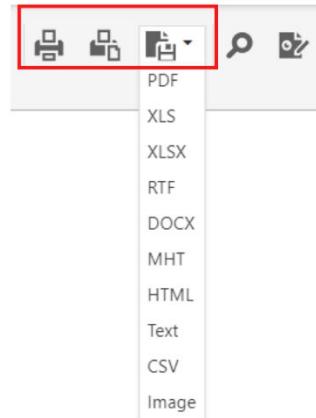
Select the report and click the green View button.

Some reports will appear immediately. Some reports require you to provide parameters and click "Submit" to view your report.



The screenshot shows a report preview interface with a toolbar at the top and 'PREVIEW PARAMETERS' settings on the right. The parameters are set to 'District: (none)' and 'Church: (none)'. Buttons for 'RESET' and 'SUBMIT' are at the bottom right.

Save in any format or print using the menu options in the top menu bar.



The screenshot shows the top menu bar with icons for print, save, and other file operations. A red box highlights the save and print icons. A dropdown menu is open below the icons, listing file formats: PDF, XLS, XLSX, RTF, DOCX, MHT, HTML, Text, CSV, and Image.