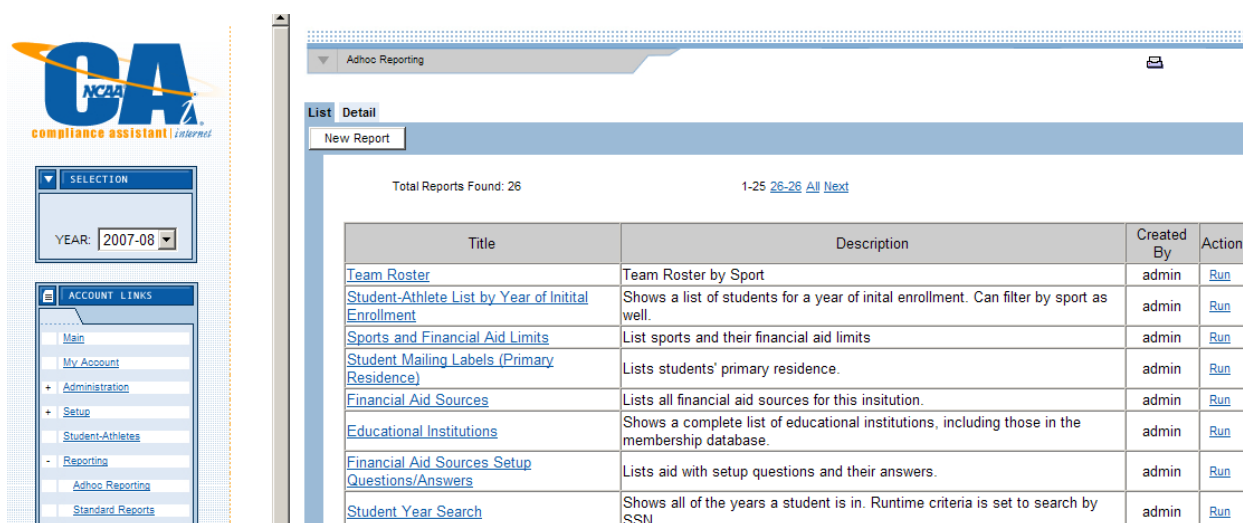


Appendix

Ad Hoc Reporting Samples

This section includes directions on how to create two sample ad hoc reports created at previous NCAA Regional Rule CA training sessions. These directions include step-by-step instructions for a Recruiting Telephone Log and a Credit Hour by Semester Report.

1. Select "Account Links" and click "Reporting" link.
2. Click the "Ad Hoc Reporting" link.



The screenshot shows the 'Ad Hoc Reporting' interface. On the left, the 'ACCOUNT LINKS' menu is expanded to 'Reporting', with 'Adhoc Reporting' selected. The main content area shows a 'New Report' button and a table of reports. The table has the following data:

Title	Description	Created By	Action
Team Roster	Team Roster by Sport	admin	Run
Student-Athlete List by Year of Initial Enrollment	Shows a list of students for a year of initial enrollment. Can filter by sport as well.	admin	Run
Sports and Financial Aid Limits	List sports and their financial aid limits	admin	Run
Student Mailing Labels (Primary Residence)	Lists students' primary residence.	admin	Run
Financial Aid Sources	Lists all financial aid sources for this institution.	admin	Run
Educational Institutions	Shows a complete list of educational institutions, including those in the membership database.	admin	Run
Financial Aid Sources Setup Questions/Answers	Lists aid with setup questions and their answers.	admin	Run
Student Year Search	Shows all of the years a student is in. Runtime criteria is set to search by SSN.	admin	Run

3. Click the "New Report" button.

How to Create a Recruiting Telephone Log

This example ad hoc report will provide the user a list of all telephone calls made to prospective student-athletes. The report in this example will provide the user the following information: the academic year, the prospects sport code, the prospects first and last name, the date and time the call was made, who placed the call, what type of call it was, whether the call was completed, any notes that were recorded, and if the system provided an error code. This specific example can be sorted by sport and filtered by academic year.

4. For the Title: Enter "Your Initials" and "Recruiting Telephone Log".
 - Example of how title should appear: AA - Recruiting Telephone Log.
5. For the Description: Enter "Telephone logs that can be printed by sport and academic year separately".

6. Click the **"Next"** button.
7. Select "Recruiting" from the "Report Category":
 - **PSA Years**
 - **PSA Calls**

8. Click the **"Next"** button.
9. Select the following Report Fields:

Note: Field labels may be chosen in the order that you want the report to print or fields may be arranged using the up and down keys.

- **PSA Year - Academic Year**
- **PSA Calls - Sport Code**
- **PSA General - First Name**
- **PSA General - Last Name**
- **PSA Calls - Telephone Date Time**
- **PSA Calls - Caller**
- **PSA Calls - Call Type**
- **PSA Calls - Complete Flag**
- **PSA Calls - Notes**
- **PSA Calls - Error Code**

10. Click the **"Next"** button.
11. Review the Report Fields – Detail screen.
 - This is where you can edit the labels to identify how you want them to appear on the report.
12. Click the **"Next"** button.
13. Skip the Report Filter screen for now.
14. Click the **"Next"** button. Select the following from the "Report Sort" screen:
 - **PSA Year - Academic Year**
 - **PSA General - Last Name**
15. Click the **"Next"** button.
16. Review the Report Heading screen.
17. Click the **"Next"** button.

18. Click the "**Save**" button.
19. Select the following from the "Report Run" screen:
 - Format: **PDF**
 - Style: **Table**
 - Page Size: **Legal**
 - Page Orientation: **Landscape**

20. Click the "**Run**" button.
21. Close the report.
22. Click the "Criteria" link.
23. Click the "**Add Criteria**" button.

Select the following:

- **PSA Year – Academic Year – Equals – 2008** (Insert the correct academic year for which the user wants the report run.)
- Ask at Runtime: **No**

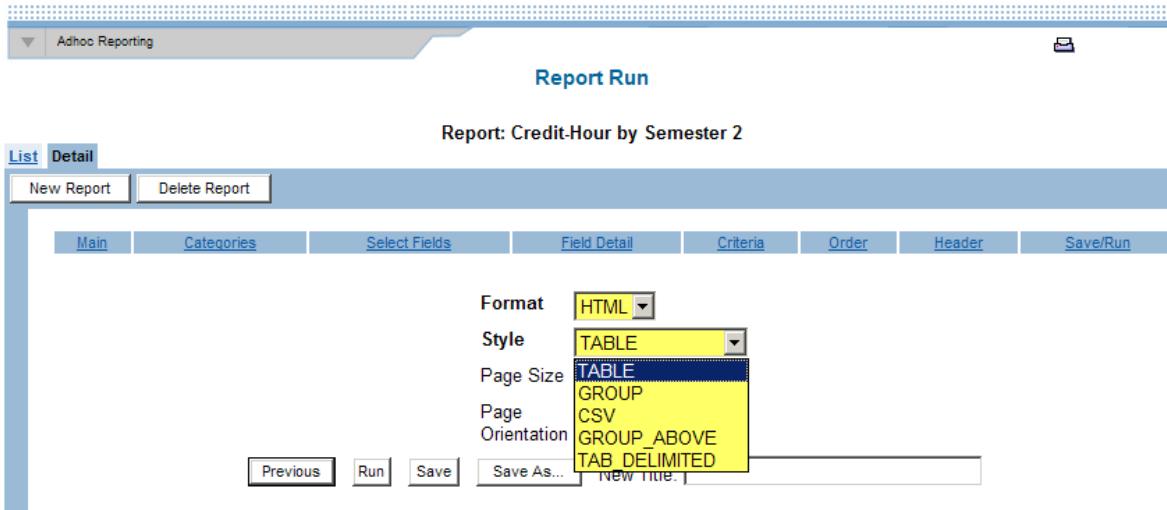
24. Click the "**Next**" button to save the added criteria.
25. Click the "**Save/Run**" link.
26. Click the "**Run**" button.
27. Close the report.
28. Click the "**Add Criteria**" button.

Select the following:

- **PSA Year – Class Year – Equals – SENIOR**
- Ask at Runtime: **No**

29. Click the "**Next**" button to save the added criteria.
30. Click the "Save/Run" link.
31. Click the "**Run**" button.
32. Close the report.

33. For an example of a different output, conduct the following steps:
 - a. Click the "Field Detail" link.
 - b. Check "Break Field" to the right of "PSA Calls – Sport Code".
 - c. Click the "**Next**" button.
 - d. Click the "Save/Run" link.



- e. Change the "Style" to "Group (or Group Above)".
- f. Click the "**Run**" button.
- g. Close the report.

04/23/2008

MV - Recruiting Telephone Log

mvaughn

Sport Code : MFB

Academic Year	First Name	Last Name	Telephone Date Time	Caller	Call Type	Complete Flag	Notes	Error Code
2007-08	Scrappy	Doo	05/15/2007	Tammy Smith	Prospect	Y		An invalid call was made.
2007-08	Scrappy	Doo	12/20/2007		Prospect	Y		Period is dead.
2007-08	Relay	Runner	03/10/2008	Michelle Vaughn	Prospect	Y		

Sport Code : MTI

Academic Year	First Name	Last Name	Telephone Date Time	Caller	Call Type	Complete Flag	Notes	Error Code
2007-08	Relay	Runner	02/15/2008	Michelle Vaughn	Prospect	Y		
2007-08	Relay	Runner	09/10/2007	Michelle Vaughn	Prospect	Y		
2007-08	EZ	Sprint	08/10/2007	Michelle Vaughn	Prospect	Y		
2007-08	EZ	Sprint	10/10/2007	Michelle Vaughn	Prospect	Y		

Sport Code : MTO

Academic Year	First Name	Last Name	Telephone Date Time	Caller	Call Type	Complete Flag	Notes	Error Code
2007-08	EZ	Sprint	11/15/2007	Michelle Vaughn	Prospect	Y		
2007-08	EZ	Sprint	07/25/2008	Michelle Vaughn	Prospect	Y		Class year is not known for this call.

How to Create a Credit Hour by Semester Report

This example ad hoc report will list student-athletes who are not completing six hours in a semester. By changing the criteria selected, a user could adapt this report to list student-athletes meeting or not meeting a variety of specified credit hour requirements.

1. For the title: Enter "Your Initials" and "Credit Hour by Semester".
 - Example of how title should appear: AA - Credit Hour by Semester.
2. For the description: Enter "Student-athletes not meeting six-hour rule".
3. Click the "**Next**" button.
4. Select the following "Report Category":
 - a. Student Information.
 - b. SA by Term.
5. Click the "**Next**" button.
6. Select the following "Report Fields":
 - **SA General - First Name**
 - **SA General - Last Name**
 - **SA General - School Sid Number**
 - **SA Terms - Hours Attempted**
 - **SA Terms - Hours Earned**
7. Click the "**Next**" button.
8. Review "Report Fields – Detail" screen.
 - This is where you can edit the labels to identify how you want them to appear on the report.
9. Click the "**Next**" button.
10. Click the "**Add Criteria**" button.

Select the following:

- **SA Terms – Academic Year – Equals 2008** (Insert appropriate academic year.)
- Ask at Runtime: **Yes**
- **SA Terms – Term Code – Equals - S1** (Insert appropriate term.)

- Ask at Runtime: **Yes**
 - **SA Terms – Hours Earned – Less than or Equals – 5** (Insert appropriate hour earned.)
 - Ask at Runtime: **Yes**
11. Click the "**Next**" button.
 12. Select the following from the Report Sort Order screen:
 - SA General – Last Name
 13. Click the "**Next**" button.
 14. Review the Report Heading screen.
 15. Click the "**Next**" button.
 16. Click the "Save/Run" link.
 17. Select the following from the Report Run screen:
 - Format: **PDF**
 - Style: **Table**
 - Page Size: **Letter**
 - Page Orientation: **Portrait**
 18. Click the "**Save**" button.
 19. Click the "**Run**" button.
 - The criteria questions will appear because Yes was selected at Ask at Runtime. This feature gives the user the opportunity to change the criteria when running the report.
 20. Click the "**Run**" button.
 21. Close the report.

Page: 1

02/08/2008	MV - Credit Hour by Semester			mvaughn	
First Name	Last Name	School Sid Number	Hours Attempted	Hours Earned	
Missa	Class	45678912	12	5	
Lazzee	Dude	49784578	14	5	
Sally	Slacker	78945871	12	4	