

Custom Report and Document Generation in Boards and Commissions

This powerful new tool uses templates made to your specifications by our Design Team featuring appointment, board, people, or system-wide data. This new feature can be used to generate reports specific to your jurisdiction's needs as well as personalized documents (welcome letter, oath of office statement, thank you for applying, etc.) to applicants or new appointments. The new **Documents** tab in the top menu takes you to the Documents Library, where you can access previously generated documents as well as create new ones. The **Generate a Document** button opens a form that enables you to generate custom reports and documents. You'll be able to select the type of data to be used in the report or document, then select a template from among those uploaded to your site by our Design Team. The Documents Library will display a table of generated reports with the template name, the data from which the report was generated, the format, the status, and the date created.

Note: This feature requires custom templates created and uploaded by Granicus. Please contact your client executive if you are interested in purchasing custom templates. Everyone can use the existing system-wide reports.

Creating Documents from the Generate a Document Page

From the Documents Library, you'll click the **Generate Document** button. On the Generate a Document page, select the appropriate tab to create a Boards, People, Appointments, or System-wide report. If you do not have any templates uploaded for a tab, you'll see a system message informing you of this.

Use the drop-down menu to select the data you want to include in the report. This example shows selection of boards for a custom board report:

Document Library

[Return to Library >...](#)

Generate A Document

Select the type of document you want to generate

BOARDS

PEOPLE

APPOINTMENTS

SYSTEM-WIDE

Quick Reports

[Vacancy Report](#)

[Boards Report](#)

[Master Roster Report](#)

[All Vacancies Report](#)

[Demographics Report](#)



The selected boards display below the menu. Use the **x** icon to remove any from the report. Next, you'll choose the template from the **Select Template** drop-down menu, which will display all of the templates uploaded for this type (Boards, People, and Appointments will contain only custom templates, while the System-wide tab's menu will have the generic system-wide reports as well as any custom templates).

Generate A Document

Select the type of document you want to generate

Select Boards ▼

Human Services Board ✕

Animal Abuse Prevention Committee ✕

Parks and Recreation Committee ✕

Select Template:

Custom Board Template Docun ▾

Select File Type:


DOC


PDF

Custom Board Template Document last generated at 04:14AM on 11/30/2016

Cancel

Generate A Document

After selecting the desired data and a template, you can choose between available file types using the icons to the right of the template menu. When you're satisfied with your choices, click the **Generate A Document** button.

You'll be redirected to the Documents Library. The report will display in the library table with the template name, the data for which the report was generated, the format, and the date created. Click the **download cloud** icon to download the document, or click the **trash can** icon to delete the report from the document library.

Generating Custom Documents from the Boards, Appointments, and People Pages

You can also generate a custom documents from the **Actions** menu on the Appointment, People, and Boards pages. This gives you a quick way to generate custom documents for individual people, appointments, or boards.

Boards Page

To generate a custom Board document, go to the Boards page, open a board from the list on the left, and click the **Board Actions** menu. Within this drop-down menu, there is an option to generate a **Custom Report**. Selecting this option will redirect you to the Generate A Document page. The Generate A Document page will have the document board tab opened with the board selected in the Board drop-down menu. You can then select the template type and file format (PDF or DOC) and generate the document.

The generated report will also be linked at the bottom of the Board Details page.

Boards

+ Add Board

Search Boards

Sort: **Name** ▼

- Appointment Swapping
- Criminal Justice Advisory Board EDIT SET
- EmailTEST
- Environmental Preservation Committee
- Financial Advisory Board**
- Fire Commission
- Historic Preservation Committee
- Housing Authority
- Human Services Board
- Import
- Jury Commission
- Library Commission
- Member Test

Financial Advisory Board

ROSTER DETAILS

Search Members

View: All ▼

| Name | Status | Term | Start | End | | | |
|--------------------|--------|------|--------------|--------------|---------|----------|----------|
| George Lopez | Active | 1 | Feb 14, 2016 | N/A | | | |
| Tasha Andreeva | Active | 1 | Feb 09, 2016 | N/A | | | |
| Jennifer Aniston | Active | 1 | Feb 11, 2016 | N/A | | | |
| Drew Carey | Active | 1 | Feb 13, 2016 | N/A | | | |
| Neil Armstrong | Active | 1 | Feb 12, 2016 | N/A | | | |
| William Shakespear | Active | 1 | Feb 11, 2016 | N/A | Clerk | Software | Action ▼ |
| Charles Dickens | Active | 1 | Feb 10, 2016 | N/A | Clerk | Software | Action ▼ |
| Charles Downing | Active | 1 | Feb 09, 2016 | N/A | Clerk | Software | Action ▼ |
| Currently Vacant | | | May 01, 2016 | Dec 30, 2016 | Officer | Judge | Action ▼ |

Board Actions ▼

- Download Board Information
 - Download Board Details as PDF
 - Download Board Roster as PDF
 - Download Redacted Board Roster as PDF
 - Download Board as Spreadsheet
 - Download Board Roster as Spreadsheet
- Custom Reports**
- Create a Board Packet
- Archive Board
- Disable Applications
- Delete Board

Appointments and People Pages

To create custom Appointment or People reports, click an individual name from either page. The application opens in the pane on the right. Click the **Actions** drop-down menu and select **Generate Custom Report**. Selecting this option will redirect you to the Generate A Document page. The Generate A Document page will have the document type tab (People or Appointment) opened with the name selected in the corresponding drop-down menu. You can then select the template type and file format (PDF or DOC) and generate a document.

The generated report will be linked in internal tracking section of the application.

You can also generate a report with more than one name by selecting the checkboxes to the left of one or more individual names from either page. Selecting the checkboxes will display the **Group Actions** menu on the right. Select the **Generate a Custom Report** option, which will redirect you to the Generate A Document page with the names selected in the corresponding drop-down menu.

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People

[Edit Application](#) [Edit Tracking](#) [+ Add Applicant](#)

LastName, FirstName

Boards ▾ Date ▾ Application Status ▾ Gender ▾ Ethnicity ▾ More ▾

[Reset Search](#)

Showing 36 of 36 results: eligible ✕ submitted ✕

| <input type="checkbox"/> | Date | Name | Email | Boards | Status | District | |
|-------------------------------------|--------------|-----------------------------------|----------------------|--|-----------|----------|---|
| <input checked="" type="checkbox"/> | Aug 18, 2016 | Cat Williams | tasha.tester0808+... | Financial Advisory Board | Submitted | | GROUP ACTIONS Change Status ▾ Edit Tracking ▾ Email Download as Spreadsheet Create Packet Appoint to a Board Generate a Report |
| <input checked="" type="checkbox"/> | Apr 12, 2016 | Jimmy White | tasha.tester0808+... | Jury Commission | Submitted | | |
| <input type="checkbox"/> | Oct 18, 2016 | Tasha TesterQA3 | testertestingthis... | Environmental Preservation Committee | Submitted | | |
| <input type="checkbox"/> | Nov 30, 2016 | Granicus Tester2 new | tashatestser0808+... | Appointment Swapping, ... | Submitted | | |
| <input type="checkbox"/> | Oct 18, 2016 | QA Tester | testingtest@gmail... | Criminal Justice Advisory Board EDIT SET | Submitted | | |
| <input type="checkbox"/> | Nov 02, 2016 | Tasha Tester | tashatester0808+3... | Appointment Swapping Board | Submitted | | |
| <input type="checkbox"/> | Nov 02, 2016 | tasha tester | natashaandreeva57... | Environmental Preservation Committee | Submitted | | |