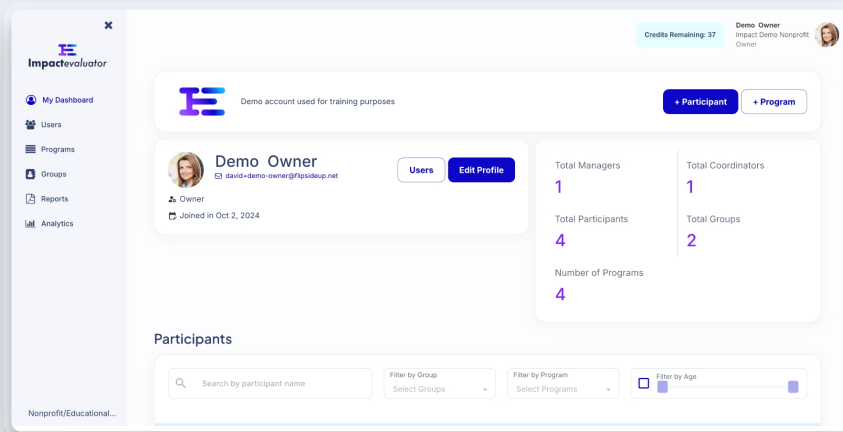


How to create a custom report

1

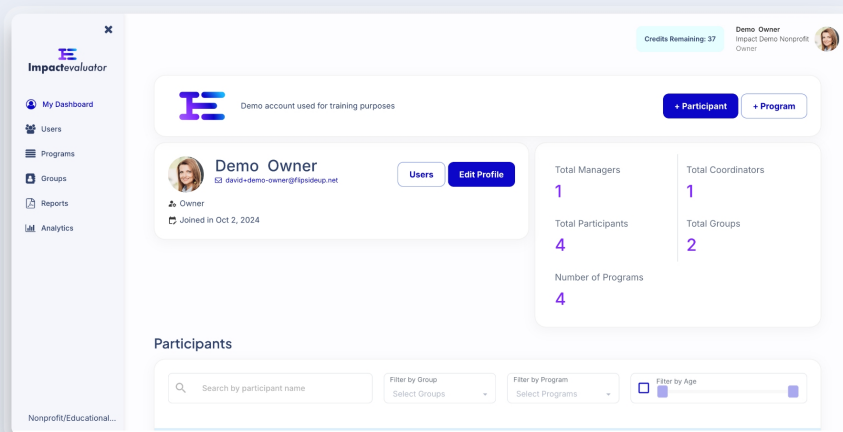
Welcome to this tutorial on Custom Reports in Impact Evaluator. Custom Reports allow you to create tailored group reports by applying specific filters to narrow down which participants you want to include.



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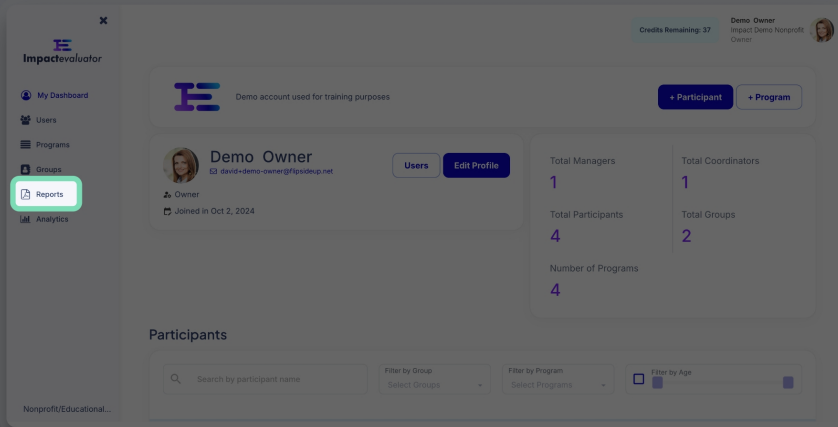
2

Unlike other reports that cover all users in a program, Custom Reports let you get more precise in your reporting.



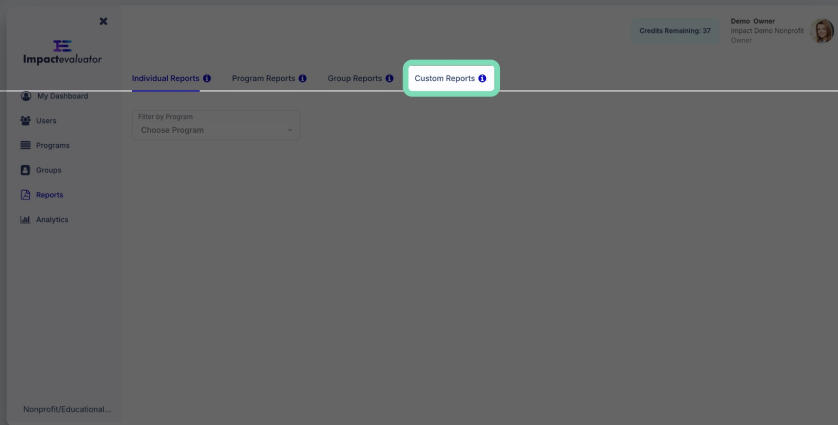
Unlike other reports that cover all users in a program, Custom Reports let you get more precise in your reporting.

3 To start, click on Reports in the left menu



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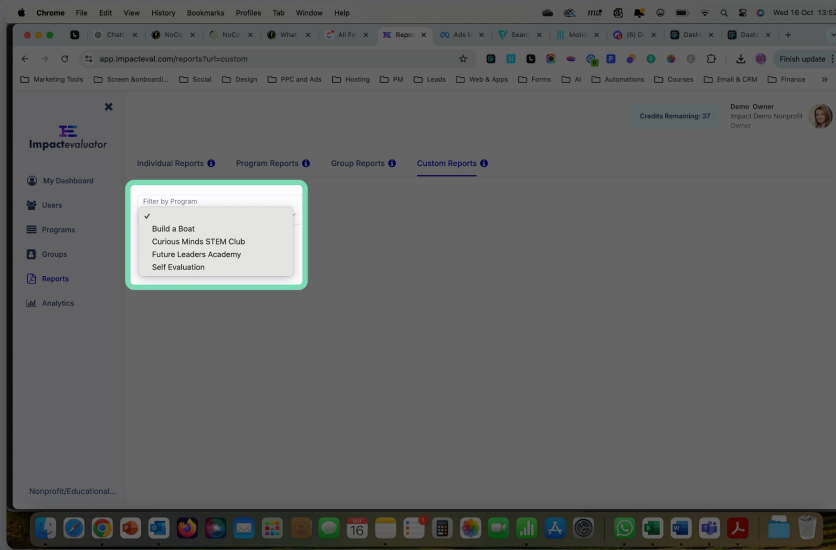
4 Then select the Custom Reports tab



Then select the Custom Reports tab

5

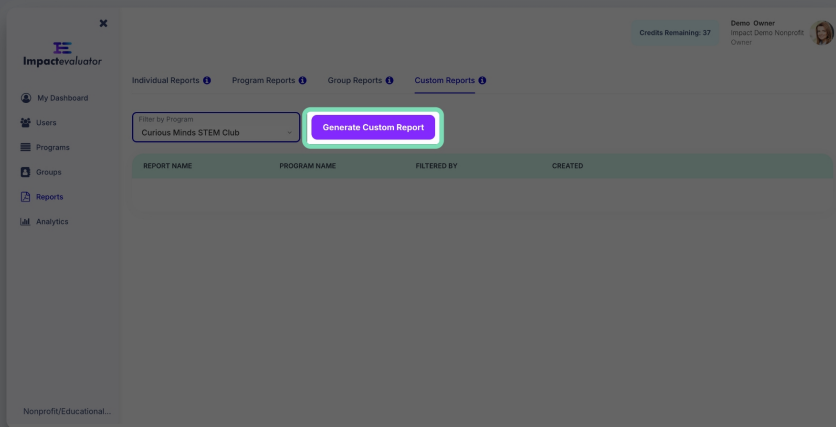
Next, choose the program you want to run the custom report for from the dropdown menu



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6

You can now generate a report for your selected program. Click the Generate Custom Report button to open the filtering popup.



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7

A popup will appear where you can customize your report. Here, you'll be able to apply filters based on your needs.

ImpactEvolverator

Individual Reports | Program

Filter by Program
Curious Minds STEM Club

REPORT NAME

My Dashboard
Users
Programs
Groups
Reports
Analytics

Nonprofit/Educational...

Create a Program Report for Curious Minds STEM Club

Give the report a name:
Name

Stage
 Baseline
 Post-Program

Create a program report based on participants that meet the following criteria:

Groups
Choose Group

Filter by Age (2 - 99)

Gender
Choose Gender

Ethnicity
Choose Ethnicity

Country
Choose Country

State
Choose State

City
Choose City

Selected users: 4

A popup will appear where you can customize your report. Here, you'll be able to apply filters based on your needs.

ImpactEvolverator

8

For example, if you're generating a report for female participants, give it a clear, descriptive name. Include the Program Name, the evaluation Stage—such as Baseline, a specific session number, or Post-Program—followed by Females and the date the report is being generated.

ImpactEvolverator

Individual Reports | Program

Filter by Program
Curious Minds STEM Club

REPORT NAME

My Dashboard
Users
Programs
Groups
Reports
Analytics

Nonprofit/Educational...

Create a Program Report for Curious Minds STEM Club

Give the report a name:
Curious Minds STEM Club | Post Program | Females | 16Oct2024

Stage
 Baseline
 Post-Program

Create a program report based on participants that meet the following criteria:

Groups
Choose Group

Filter by Age (2 - 99)

Gender
Female

Ethnicity
Choose Ethnicity

Country
Choose Country

State
Choose State

City
Choose City

Selected users: 3

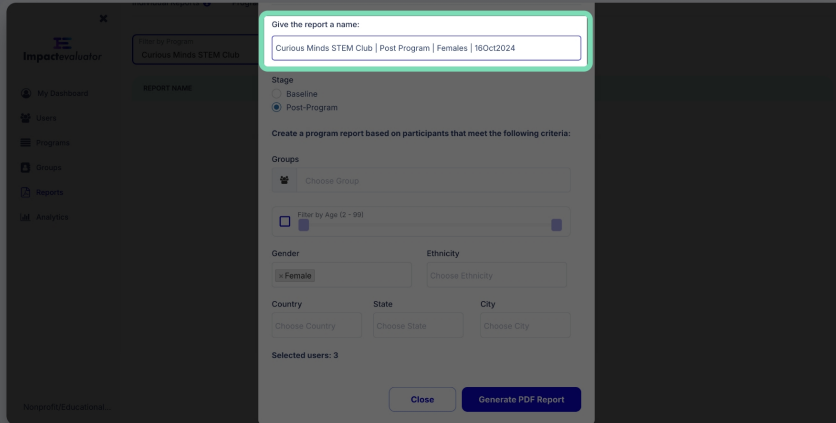
Close Generate PDF Report

For example, if you're generating a report for female participants, give it a clear, descriptive name. Include the Program Name, the evaluation Stage—such as Baseline, a specific session number, or Post-Program—followed by Females and the date the report is being generated.

ImpactEvolverator

9

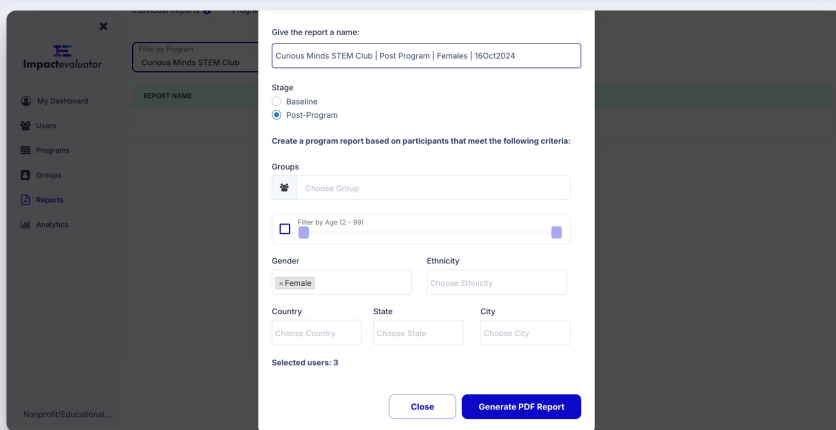
I have named mine - Curious Minds STEM Club, Post Program, Females, 16th of October 2024



I have named mine - Curious Minds STEM Club, Post Program, Females, 16th of October 2024

10

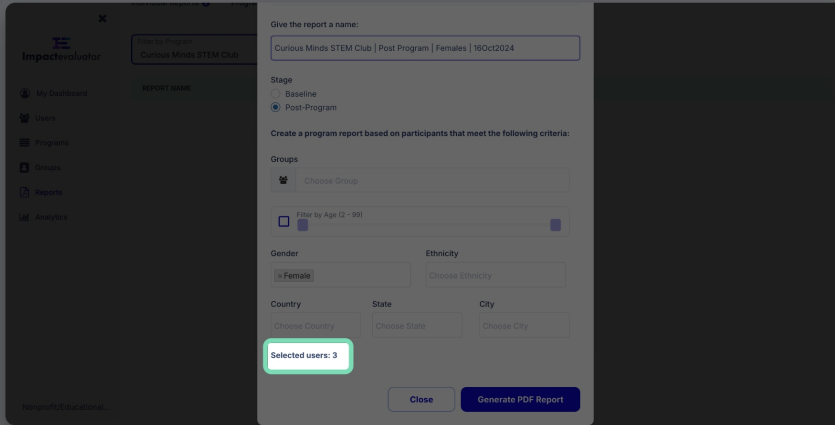
As you apply the filters, the participant count will update automatically based on how many users match your criteria.



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11

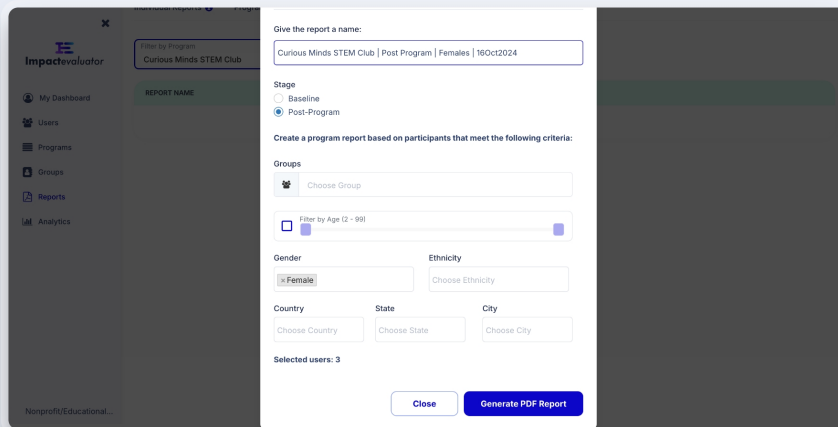
This updated count can be seen near the bottom of the popup, helping you ensure the report captures exactly the group you need.



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12

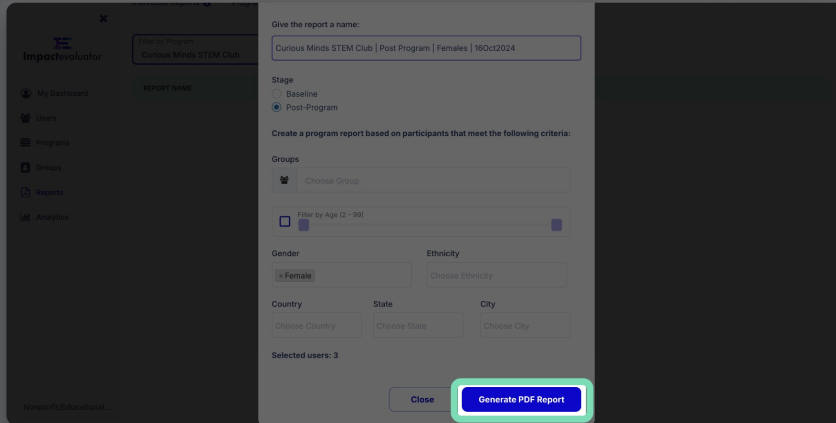
You can get creative with these custom reports by filtering participants in any way that best suits your analysis needs.



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13

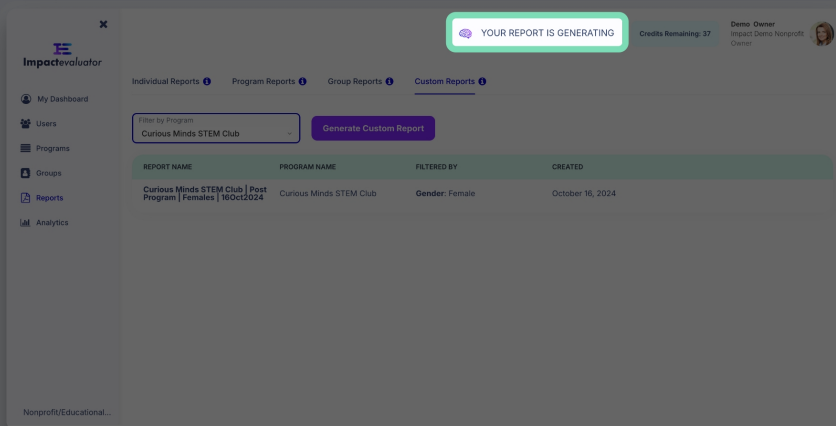
Once you've applied the filters and selected the stage, click Generate PDF Report.



Once you've applied the filters and selected the stage, click Generate PDF Report.

14

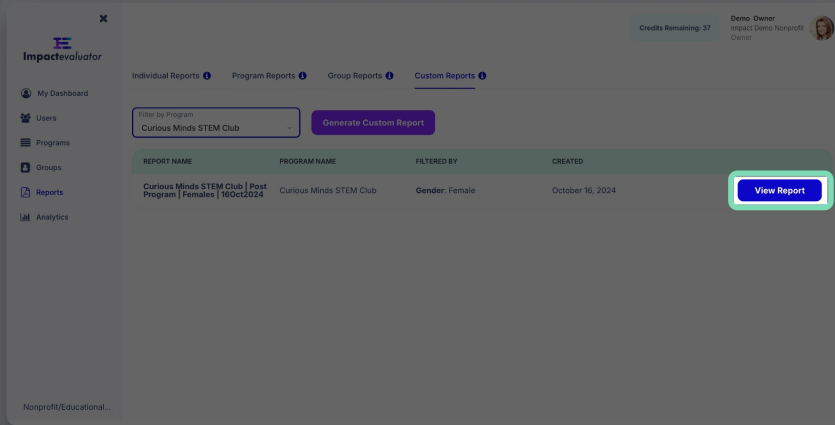
You'll see a spinner indicating that the report is being generated. You can either wait on the page or log out and return later. You'll also receive an email notification once the report is ready.



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15

When the report is complete, a View Report button will appear. Simply click this button to access your custom report.



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16

The report will be downloaded to your computer. You can then review the insights and trends specific to the participants as a group that you filtered for.



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17

And that's how you create a Custom Report in Impact Evaluator! Custom Reports let you focus on exactly the data you need, giving you flexibility to analyze specific groups. Thanks for watching.



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