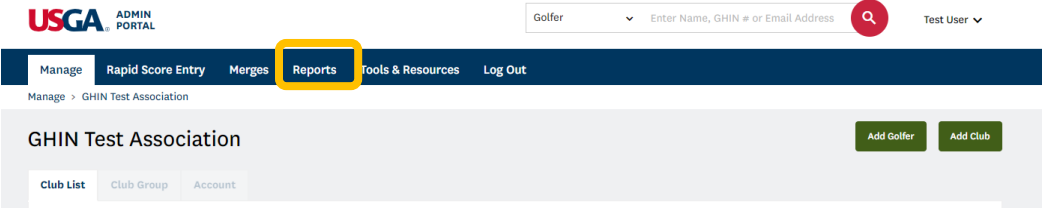


View a Template Report

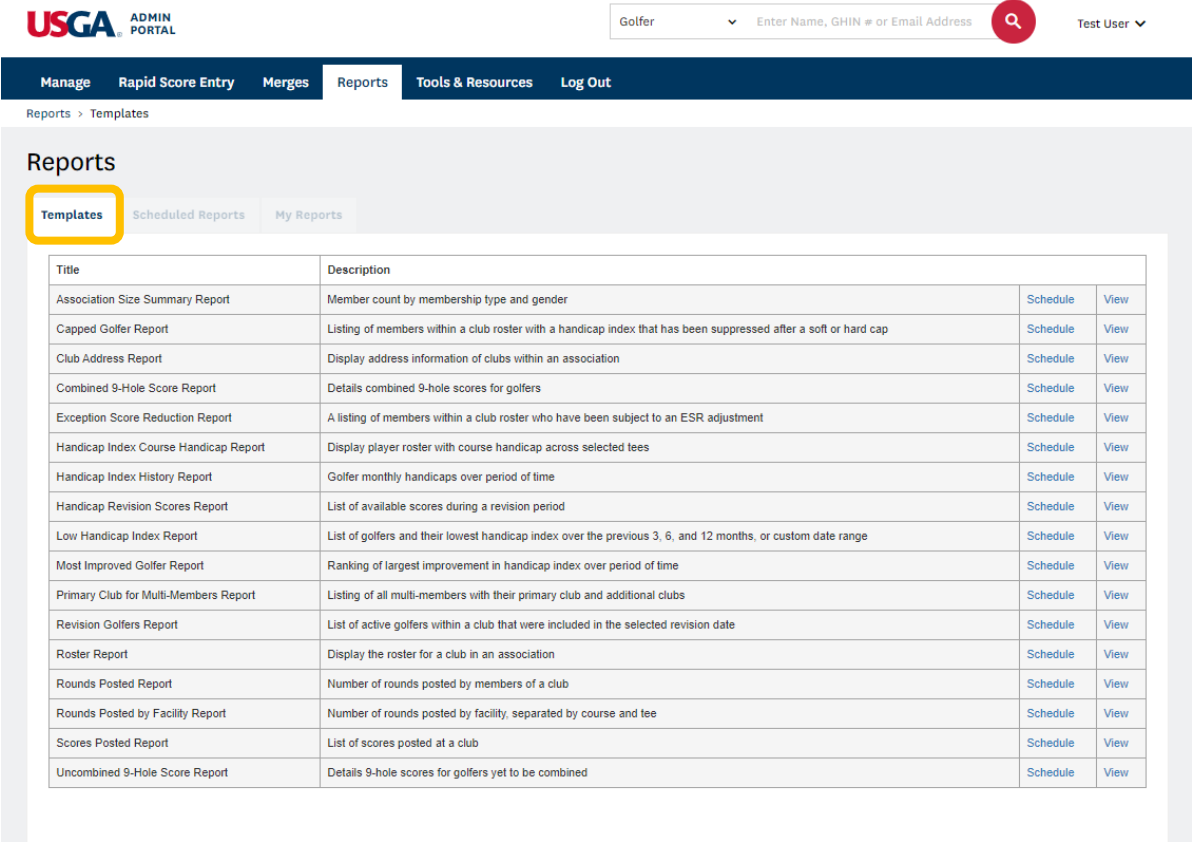
This section provides an overview of a User’s ability to view a template reports.

NOTE: All template reports provide the end user with real-time data.

1. From the homepage, click “Reports” on the top navigation bar



2. Click the “Template Reports” tab



3. Find the desired report from the available list and click “View”.

USGA ADMIN PORTAL

Golfer Enter Name, GHIN # or Email Address Test User

Manage Rapid Score Entry Merges Reports Tools & Resources Log Out

Reports > Templates

Reports

Templates Scheduled Reports My Reports

Title	Description	Schedule	View
Association Size Summary Report	Member count by membership type and gender	Schedule	View
Capped Golfer Report	Listing of members within a club roster with a handicap index that has been suppressed after a soft or hard cap	Schedule	View
Club Address Report	Display address information of clubs within an association	Schedule	View
Combined 9-Hole Score Report	Details combined 9-hole scores for golfers	Schedule	View
Exception Score Reduction Report	A listing of members within a club roster who have been subject to an ESR adjustment	Schedule	View

4. Update filters as desired and click “Submit” to run the report.

USGA ADMIN PORTAL

Golfer Enter Name, GHIN # or Email Address Test User

Manage Rapid Score Entry Merges Reports Tools & Resources Log Out

Reports > Templates

Reports

Templates Scheduled Reports My Reports

Title	Description	Schedule	View
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Capped Golfer Report	Listing of members within a club roster with a handicap index that has been suppressed after a soft or hard cap	Schedule	View
Club Address Report	Display address information of clubs within an association	Schedule	View
Combined 9-Hole Score Report	Details combined 9-hole scores for golfers	Schedule	Hide

Columns to Display: <All> Club Name: <All> Sort Column: Last Name Sort Order: Ascending

Gender: All Golfer Groups: <All> Golfer Status: Active GHIN Number (Separated by):

Posted Date Start: January 1, 2019 Date Posted To: November 22, 2019 Played Date Start: January 1, 2019 Played Date End: November 22, 2019

Submit

5. The Report Viewer window will then open in a new tab for the User to interact with

1 **2** **3** **4**

Page 1 of + Full Data

USGA in association with **GHIN** **USGA**

Combined 9-Hole Score Report
GHIN Test Association
All Clubs within Association

GHIN Number	Local Number	Prefix	First Name	Middle Name	Last Name	Suffix	Golfer Name	Date Posted	Date Played	Score Type	ESC Score	Course Rating	Slope Rating	Differential	Tee
8444712	13		Andre		Aksetrod		Andre Aksetrod								
8444712			Andre		Aksetrod		Andre Aksetrod								
8444712	50		Andre		Aksetrod		Andre Aksetrod								
8416406	95		Mozart		Amadeus		Mozart Amadeus								
4880205	777779		Doug	D.	Baxter	Jr.	Doug D. Baxter Jr.								
4880205	33		Doug	D.	Baxter	Jr.	Doug D. Baxter Jr.								
4880205	75		Doug	D.	Baxter	Jr.	Doug D. Baxter Jr.								
4880205	3333		Doug	D.	Baxter	Jr.	Doug D. Baxter Jr.								
4880205	37		Doug	D.	Baxter	Jr.	Doug D. Baxter Jr.								
4299915	36	Mr.	Harry		Beem		Mr. Harry Beem								
4299915	117	Mr.	Harry		Beem		Mr. Harry Beem								
4299915	28	Mr.	Harry		Beem		Mr. Harry Beem								
4299915	37	Mr.	Harry		Beem		Mr. Harry Beem								
6893807			Charlie		Capasso		Charlie Capasso								
6893807			Charlie		Capasso		Charlie Capasso								
6893807			Charlie		Capasso		Charlie Capasso								
6893807			Charlie		Capasso		Charlie Capasso	11/13/2019	11/13/2019	H	39	37.9	137	.9	BLUE
6893807			Charlie		Capasso		Charlie Capasso	11/14/2019	11/14/2019	A	38	39.3	146	-1.0	Taupe
6893807			Charlie		Capasso		Charlie Capasso	11/14/2019	11/14/2019	H	41	38.9	141	1.7	Taupe
3708664	287		White		Carl		White Carl	1/30/2019	1/30/2019	H	41	37.6	146	2.6	4 Poppy

Page 1
Report Execution Date/Time: 11/22/2019 3:07:42 PM

5

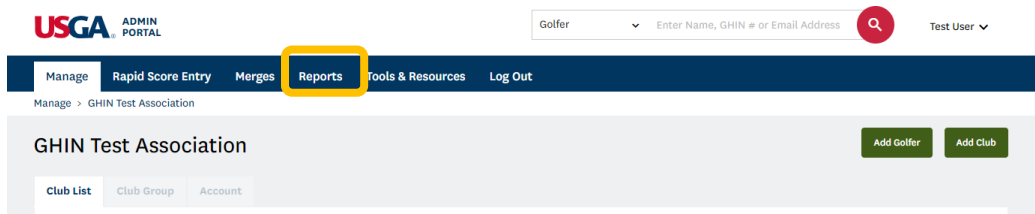
Report Viewer Interactions (refer to screenshot above)

1. Exporting report
2. Show Filter panel to do further report interaction
3. Search the document for a key word
4. Page through report (when >1 page)
5. Confirm Footer
 - a. Report execution date/time

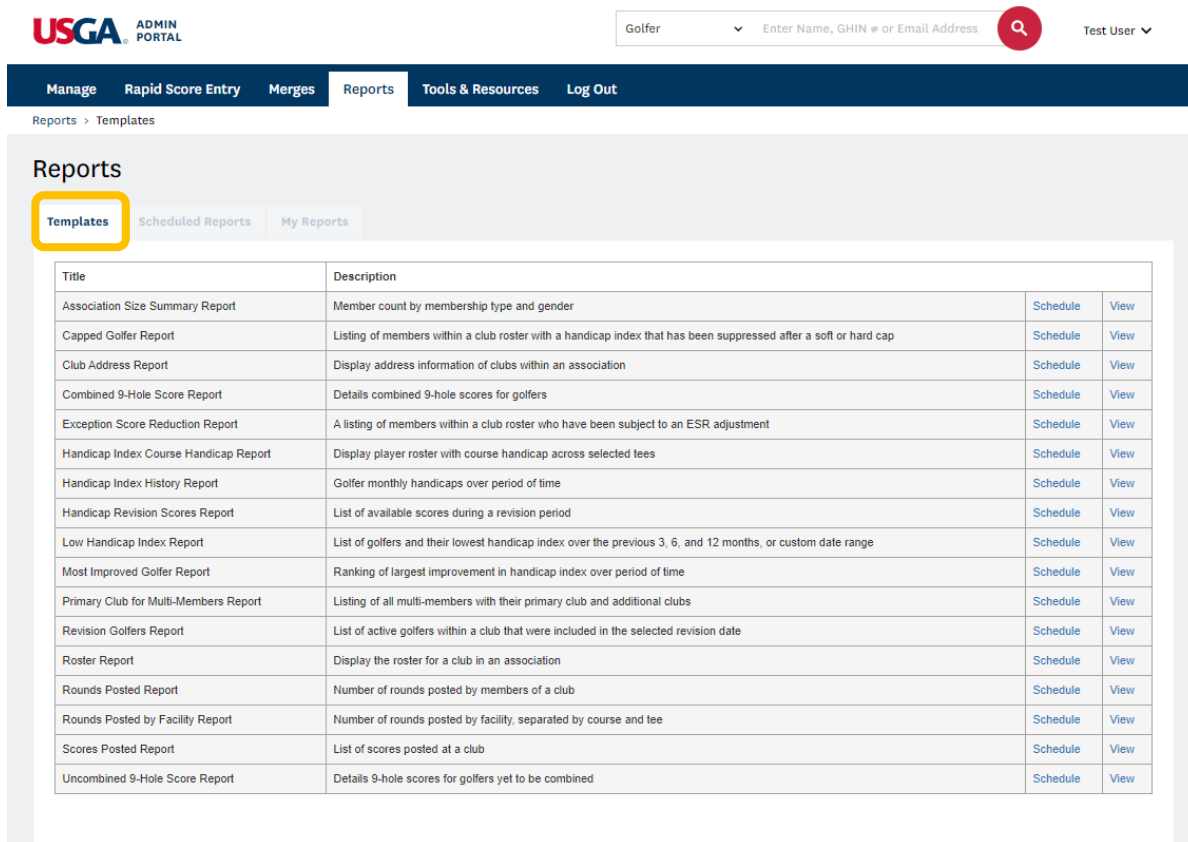
Schedule a Template Report

This section provides an overview of a User’s ability to schedule a template report.

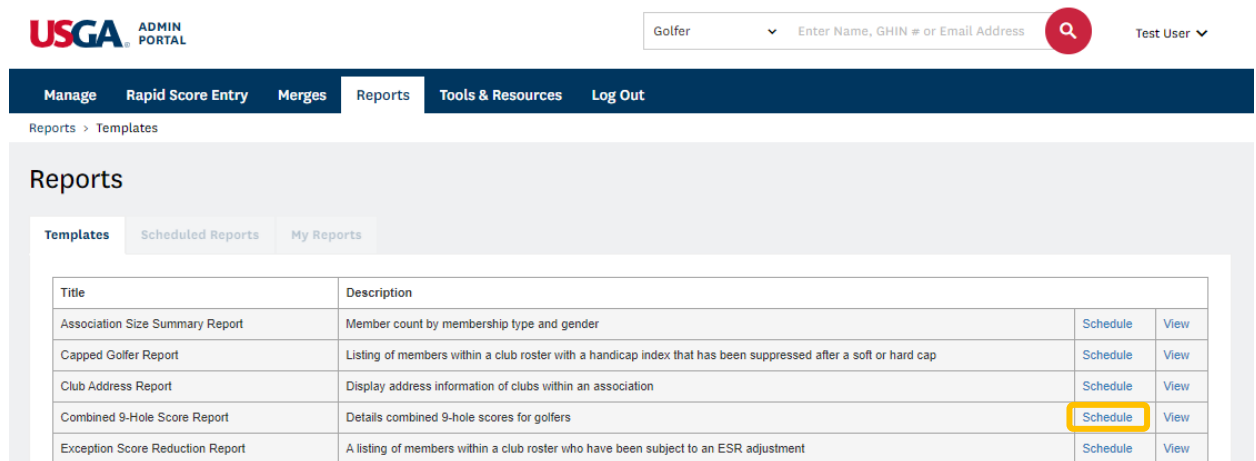
1. From the homepage, click “Reports” on the top navigation bar



2. Click the “Template Reports” tab.



3. Find the desired report from the available list and click "Schedule".

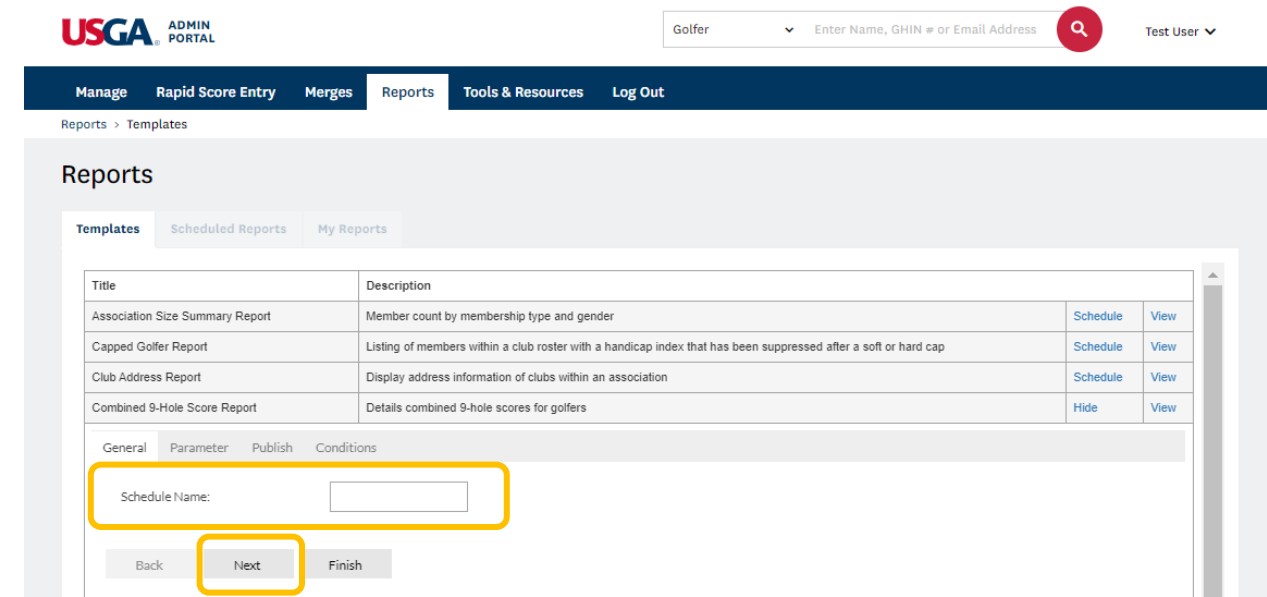


The screenshot shows the USGA Admin Portal interface. At the top, there is a search bar with a dropdown menu set to 'Golfer' and a search icon. Below the search bar is a navigation menu with options: Manage, Rapid Score Entry, Merges, Reports, Tools & Resources, and Log Out. The 'Reports' section is active, and the breadcrumb trail shows 'Reports > Templates'. The main heading is 'Reports', and there are three tabs: 'Templates', 'Scheduled Reports', and 'My Reports'. A table lists several reports with columns for Title, Description, Schedule, and View. The 'Schedule' button for the 'Combined 9-Hole Score Report' is highlighted with a yellow box.

Title	Description	Schedule	View
Association Size Summary Report	Member count by membership type and gender	Schedule	View
Capped Golfer Report	Listing of members within a club roster with a handicap index that has been suppressed after a soft or hard cap	Schedule	View
Club Address Report	Display address information of clubs within an association	Schedule	View
Combined 9-Hole Score Report	Details combined 9-hole scores for golfers	Schedule	View
Exception Score Reduction Report	A listing of members within a club roster who have been subject to an ESR adjustment	Schedule	View

4. Complete the Schedule Settings:

Provide a Schedule Name and click "Next"



The screenshot shows the USGA Admin Portal interface, similar to the previous one. The 'Reports' section is active, and the breadcrumb trail shows 'Reports > Templates'. The main heading is 'Reports', and there are three tabs: 'Templates', 'Scheduled Reports', and 'My Reports'. A table lists several reports with columns for Title, Description, Schedule, and View. The 'Schedule' button for the 'Combined 9-Hole Score Report' is highlighted with a yellow box. Below the table, there are four tabs: 'General', 'Parameter', 'Publish', and 'Conditions'. The 'General' tab is active, and it contains a form with a 'Schedule Name:' label and an input field. Below the input field are three buttons: 'Back', 'Next', and 'Finish'. The 'Next' button is highlighted with a yellow box.

Title	Description	Schedule	View
Association Size Summary Report	Member count by membership type and gender	Schedule	View
Capped Golfer Report	Listing of members within a club roster with a handicap index that has been suppressed after a soft or hard cap	Schedule	View
Club Address Report	Display address information of clubs within an association	Schedule	View
Combined 9-Hole Score Report	Details combined 9-hole scores for golfers	Hide	View

General Parameter Publish Conditions

Schedule Name:

Back Next Finish

Update filters as desired and click “Next”

USGA ADMIN PORTAL

Golfer Test User

Manage Rapid Score Entry Merges **Reports** Tools & Resources Log Out

Reports > Templates

Reports

Templates Scheduled Reports My Reports

Title	Description		
Association Size Summary Report	Member count by membership type and gender	Schedule	View
Capped Golfer Report	Listing of members within a club roster with a handicap index that has been suppressed after a soft or hard cap	Schedule	View
Club Address Report	Display address information of clubs within an association	Schedule	View
Combined 9-Hole Score Report	Details combined 9-hole scores for golfers	Hide	View

General Parameter Publish Conditions

Columns to Display: Golf Association: Club Name: Sort Column:

<All> GHIN Test Association <All> Last Name

Sort Order: Gender: Golfer Groups: Golfer Status:

Ascending All <All> Active

GHIN Number (Separated by ;): Posted Date Start: Date Posted To: Played Date Start:

January 1, 2019 January 1, 2019 January 1, 2019

Played Date End:



Tip: Delivery Options for Clubs are as follows:

- Clubs – Email, Portal, or Email & Portal

To email the schedule report, select ‘New’

The screenshot shows the USGA Admin Portal interface. At the top, there is a search bar with the text "Golfer" and "Enter Name, GHIN # or Email Address" and a "Test User" dropdown. Below the search bar is a navigation menu with "Manage", "Rapid Score Entry", "Merges", "Reports", "Tools & Resources", and "Log Out". The "Reports" section is active, showing a breadcrumb "Reports > Templates".

The main content area is titled "Reports" and has three tabs: "Templates", "Scheduled Reports", and "My Reports". The "Templates" tab is selected, displaying a table of report templates:

Title	Description		
Association Size Summary Report	Member count by membership type and gender	Schedule	View
Capped Golfer Report	Listing of members within a club roster with a handicap index that has been suppressed after a soft or hard cap	Schedule	View
Club Address Report	Display address information of clubs within an association	Schedule	View
Combined 9-Hole Score Report	Details combined 9-hole scores for golfers	Hide	View

Below the table, there are tabs for "General", "Parameter", "Publish", and "Conditions". The "Conditions" tab is selected, showing a "Mail To" form. The form has a "To Version" dropdown and a "To E-mail" dropdown. Below the "To E-mail" dropdown is a "Mail To:" label and a text input field. Below the input field are three buttons: "New", "Edit", and "Delete". The "New" button is highlighted with a yellow border.

Add the desired email address(es), email subject, and file delivery type(s) and click “Ok”

Reports > Templates

Reports

Templates Scheduled Reports My Reports

Title	Description		
Association Size Summary Report	Member count by membership type and gender	Schedule	View
Capped Golfer Report	Listing of members within a club roster with a handicap index that has been suppressed after a soft or hard cap	Schedule	View
Club Address Report	Display address information of clubs within an association	Schedule	View
Combined 9-Hole Score Report	Details combined 9-hole scores for golfers	Hide	View

Mail To:

To:

Cc:

Bcc:

Subject: Combined 9-Hole Score Report

Attachment in PDF Format
 Attachment in Excel Format

Once the desired delivery format and recipients are added, click "Next"

Reports > Templates

Reports

Templates Scheduled Reports My Reports

Title	Description		
Association Size Summary Report	Member count by membership type and gender	Schedule	View
Capped Golfer Report	Listing of members within a club roster with a handicap index that has been suppressed after a soft or hard cap	Schedule	View
Club Address Report	Display address information of clubs within an association	Schedule	View
Combined 9-Hole Score Report	Details combined 9-hole scores for golfers	Hide	View

To:

Cc:

Bcc:

Subject: Combined 9-Hole Score Report

Attachment in PDF Format
 Attachment in Excel Format

Excel Version:

Select the desired delivery time zone and frequency

The screenshot shows the USGA Admin Portal interface. At the top, there is a search bar with the text 'Golfer' and a dropdown arrow, followed by 'Enter Name, GHIN # or Email Address' and a search icon. To the right, it says 'Test User' with a dropdown arrow. Below this is a navigation bar with tabs: 'Manage', 'Rapid Score Entry', 'Merges', 'Reports', 'Tools & Resources', and 'Log Out'. Underneath the navigation bar, it says 'Reports > Templates'. The main content area is titled 'Reports' and has three tabs: 'Templates', 'Scheduled Reports', and 'My Reports'. The 'Templates' tab is active. Below the tabs is a table with the following data:

Title	Description		
Association Size Summary Report	Member count by membership type and gender	Schedule	View
Capped Golfer Report	Listing of members within a club roster with a handicap index that has been suppressed after a soft or hard cap	Schedule	View
Club Address Report	Display address information of clubs within an association	Schedule	View
Combined 9-Hole Score Report	Details combined 9-hole scores for golfers	Hide	View

Below the table, there are four tabs: 'General', 'Parameter', 'Publish', and 'Conditions'. The 'General' tab is active. In the 'General' tab, there are two dropdown menus: 'Time Zone:' with the value 'Eastern Time (US & Canad)' and 'Time Type:' with the value 'Run this task immediately'. These two dropdown menus are highlighted with a yellow box. At the bottom of the 'General' tab, there are three buttons: 'Back', 'Next', and 'Finish'.

Time Type (Frequency) options include the following:

1. Run Immediately (see image above)
2. Run at a specific date & time

The screenshot shows the USGA Admin Portal interface, specifically the 'General' tab of the 'Combined 9-Hole Score Report' template. The 'Time Type' dropdown menu is set to 'Run this task at'. Below this, there is a date field with the value 'Nov 22, 2019' and a time field with the value '8:54 AM'. At the bottom of the 'General' tab, there are three buttons: 'Back', 'Next', and 'Finish'.

3. Run task periodically
 - a. Daily

Combined 9-Hole Score Report Details combined 9-hole scores for golfers Hide View

Time Type: Run this task periodically

Duration:
 Run after
 Run until

Date: Daily

Every 1 days
 Every weekday

Time: At

Time: 9:00 AM

Back Next Finish

b. Weekly

Combined 9-Hole Score Report Details combined 9-hole scores for golfers Hide View

Time Type: Run this task periodically

Duration:
 Run after
 Run until

Date: Weekly

Every 1 weeks

On: Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Time: At

Time: 9:00 AM

Back Next Finish

c. Monthly

Combined 9-Hole Score Report Details combined 9-hole scores for golfers Hide View

Time Type: Run this task periodically

Duration:
 Run after
 Run until

Date: Monthly

The 1st day of every 1 months
 The first Saturday of every 1 months

Time: At

Time: 9:00 AM

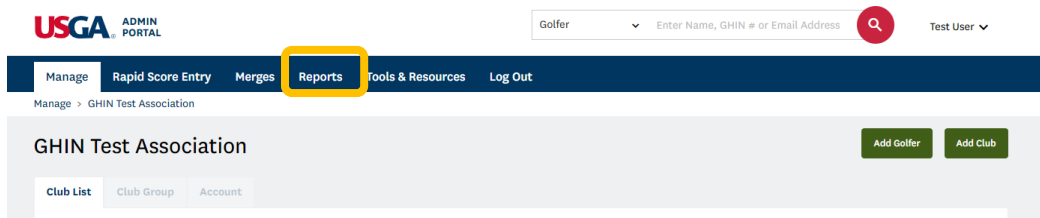
Back Next Finish

After selecting desired report delivery time, click “Finish”

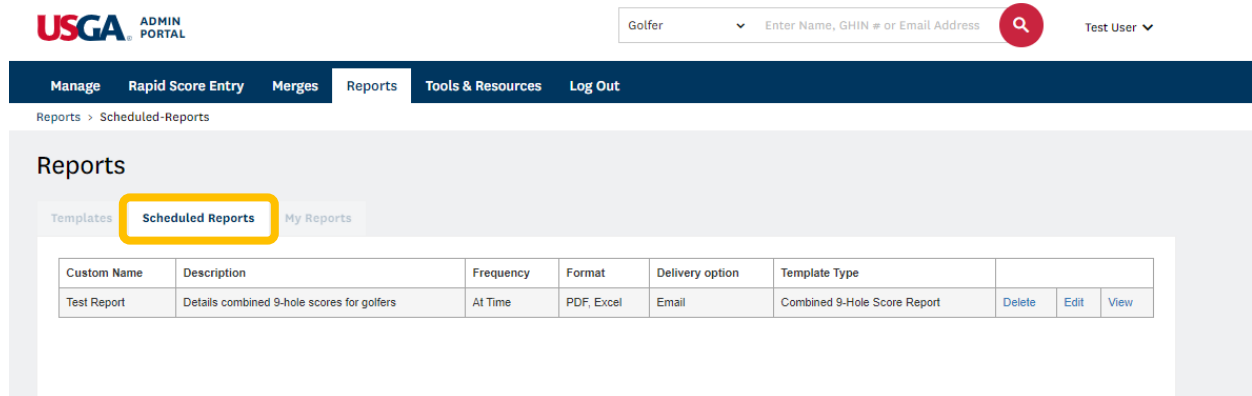
Interact with a Previously Scheduled Report

This section provides an overview of a User’s ability to edit a previously schedule report.

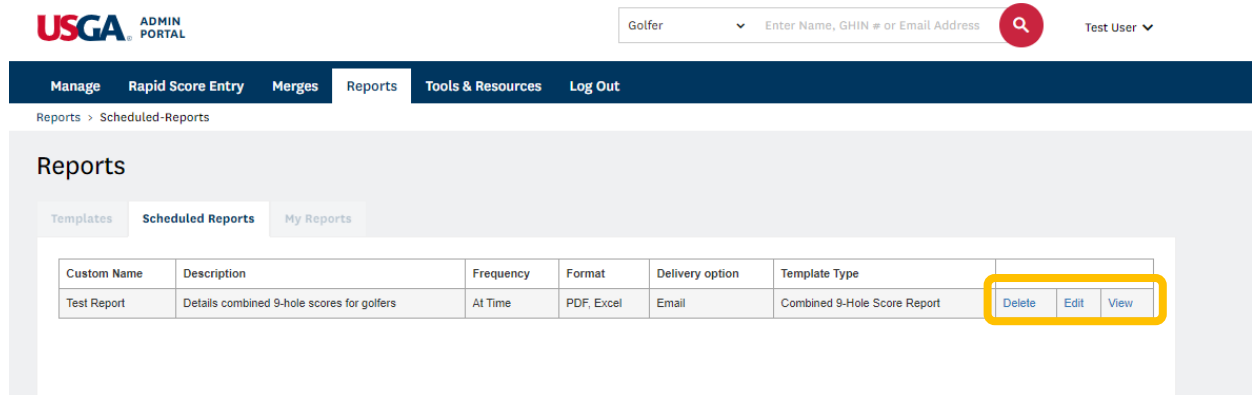
1. From the homepage, click “Reports” on the top navigation bar



2. Click the “Scheduled Reports” tab



3. Once you find the Scheduled Report that you wish to interact with, you can Delete, Edit or View the existing scheduled report.



Delete

- This feature will delete the report from being generated in the future. It will not delete reports previously delivered to 'My Reports'.

Edit

- Allows users to edit or update any of the previously scheduled report settings.

View

- The functionality allows you to run an existing scheduled report outside of the defined scheduled time.