Administrator Training
Report Writer



Overview: Report Writer

The Report Writer allows you to configure and run reports that meet your own specific needs. When creating a new report, you can begin with a pre-defined model that is based on the type of information you would like to retrieve. You can also copy an existing report to use as a starting point for a new report. Using either of these approaches, you can then:

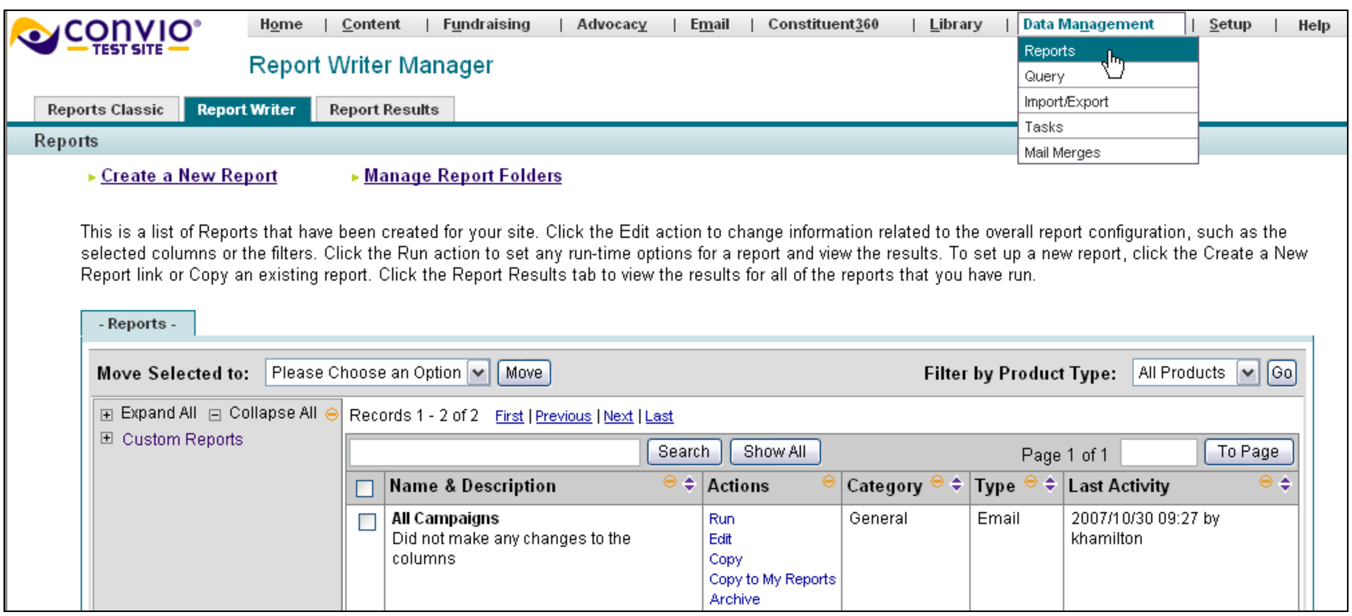
- add/remove/rearrange columns
- rename columns
- designate columns for sorting
- use filters to refine your report results
- organize your reports in folders
- use permission levels and security categories to control access to reports

The permissions associated with the Report Writer allow you to designate that only certain individuals can create report configurations, while others can be restricted to editing of existing reports, and still others to simply running the reports. These roles allow you to maintain maximum control over your reporting environment.

Currently, the Report Writer is available for reporting on Email, Personal Events, TeamRaiser, Constituent360 Interactions, and Receipts (if enabled).

Accessing and Viewing the Reports List

To access Report Writer, select ***Reports*** from the *Data Management* menu. Then click the ***Report Writer*** tab. To access any reports created previously in Reports Classic, click the ***Reports Classic*** tab.



Each report has a list of available *Actions*[1]. Click:

- ***Run*** to run a report
- ***Edit*** to edit the configuration options of the report (filters, sort order, columns, etc.)
- ***Copy*** to copy a report
- ***Copy to My Reports*** to copy a report to your own personal reports folder
- ***Archive*** to remove a report from the main view
- ***Publish to Company Coordinator***[2] to make a report available to company coordinators when they are editing their company page

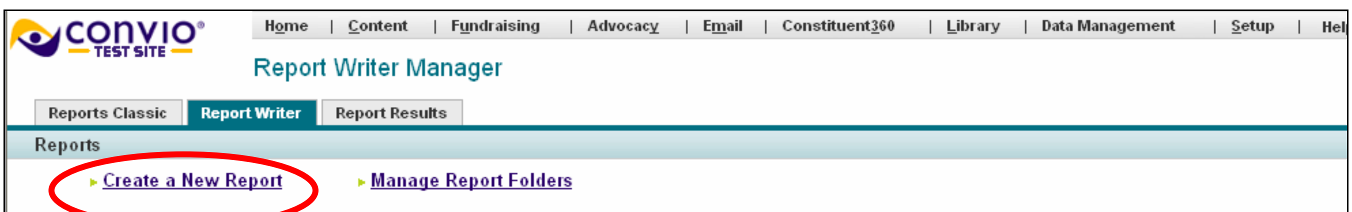
Create a New Report

When creating a new report you have two options:

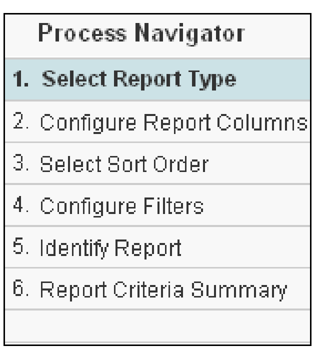
- **Create the Report from a Model** -- This approach allows you to start with a report model that contains the *types* of data you would like to retrieve. You can then design your report using the fields that are available in the model.
- **Create the Report from a Copy** -- This approach allows you to start with a report that is approximately what you want and modify it to meet your specific needs. You can copy one of your own reports or a report that was created by someone else. (Note that this is the only way to edit someone else's report configuration.)

Create a Report from a Model

To create a new report from a model, start by clicking ***Create a New Report*** in the upper left-hand corner of the main page.



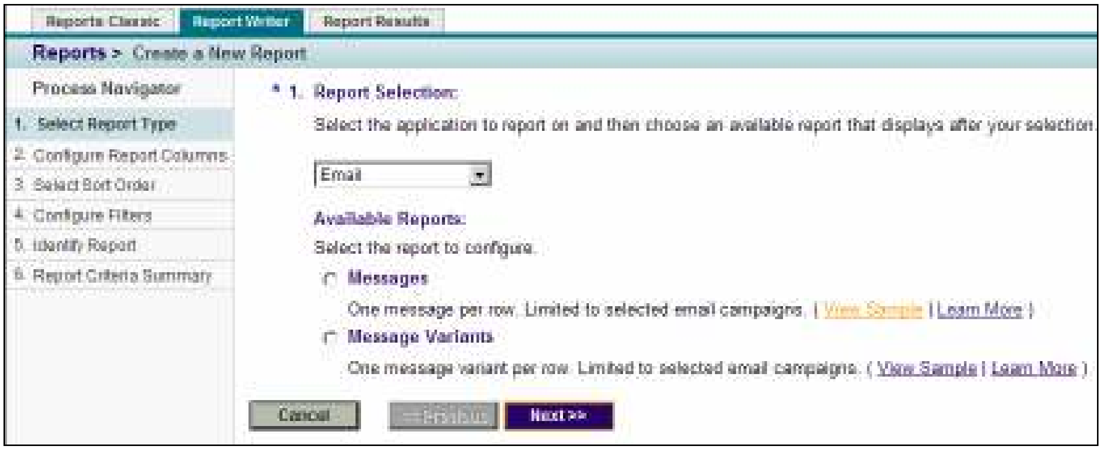
You will see a Process Navigator on the left side of the page to guide you through the process of creating a new report.



[1] Please note that some of the actions listed may not be available; it depends on your level of access to a particular report.

[2] TeamRaiser only

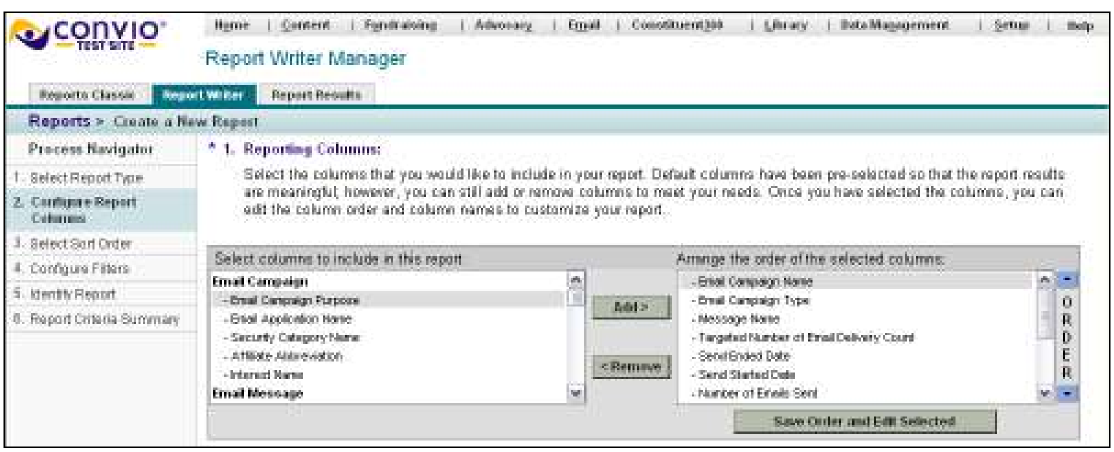
In Step 1, **Report Type**, select the product from which you would like to generate a report. Once you select the product, you will see a list of the available models from which to choose. A **model** is a starting point for a report, based on the **type** of information that you would like to retrieve. For example, below is a list of the models available for Email Campaigns. You can choose whether you wish to report on email messages or email message variants. Once you've made your selection, click Next >>



Configure Report Columns

In Step 2, you can modify the columns on your report. You can add columns, remove columns, change the order of the columns, and rename the columns.

To add columns to your report, begin by selecting the column(s) you wish to add from the list of columns on the left side of the page. You can select a group of columns by clicking on the bolded category above the group of related columns (ex. Email Campaign). On the right side of the page, select the field AFTER which the column selected on the left will display. Click Add > to add the column to the report. Click ***Save Order and Edit Selected*** to save your changes.



To remove columns from the report, highlight the column you wish to remove from the list on the RIGHT. Click < Remove.

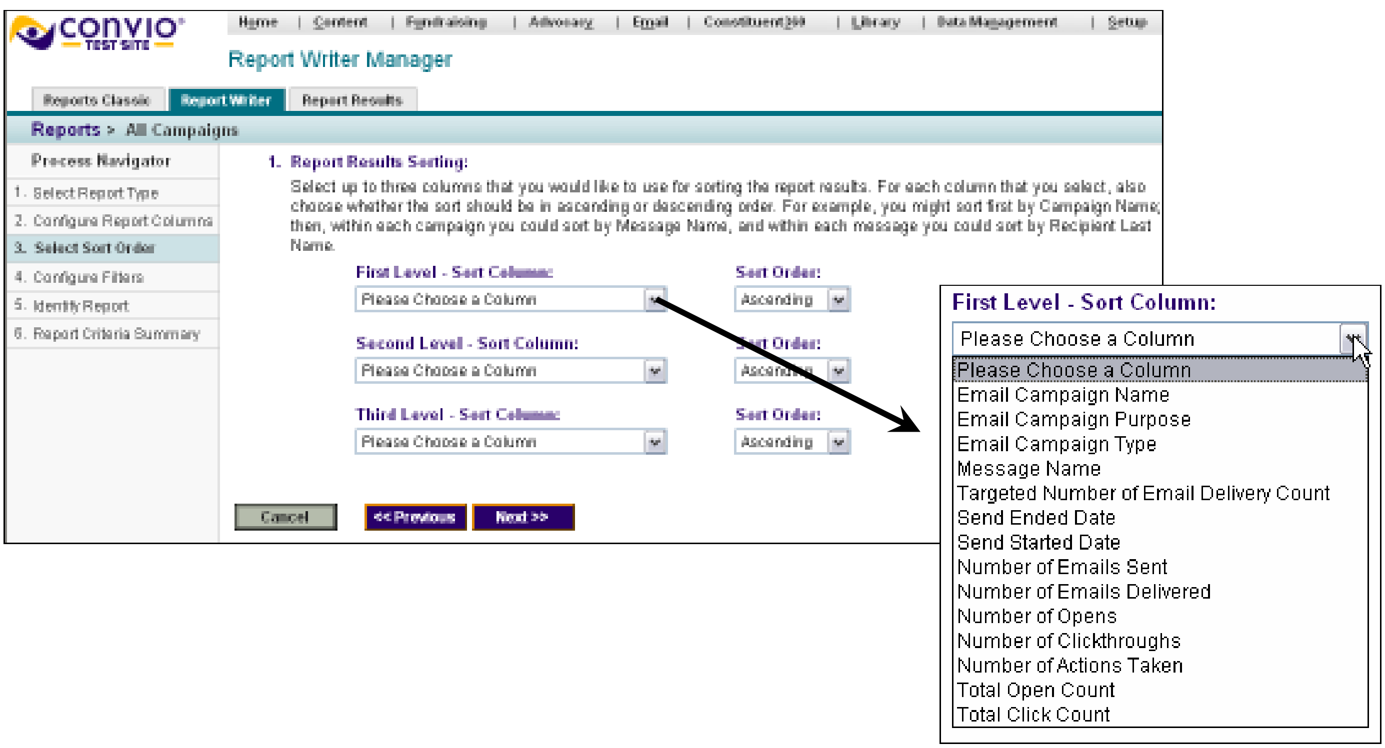
To change the order of the columns on the report, highlight the column you wish to move in the list on the RIGHT. Use the “up” or “down” arrows to the right of the list of columns to move the column.

To rename a column, highlight the column you wish to rename in the list on the RIGHT. Click Save Order and Edit Selected. Below the two lists of columns, for **Column Name**, enter the new name for the column.

Click Next >> once you’ve completed making changes to the columns on the report.

Select Sort Order

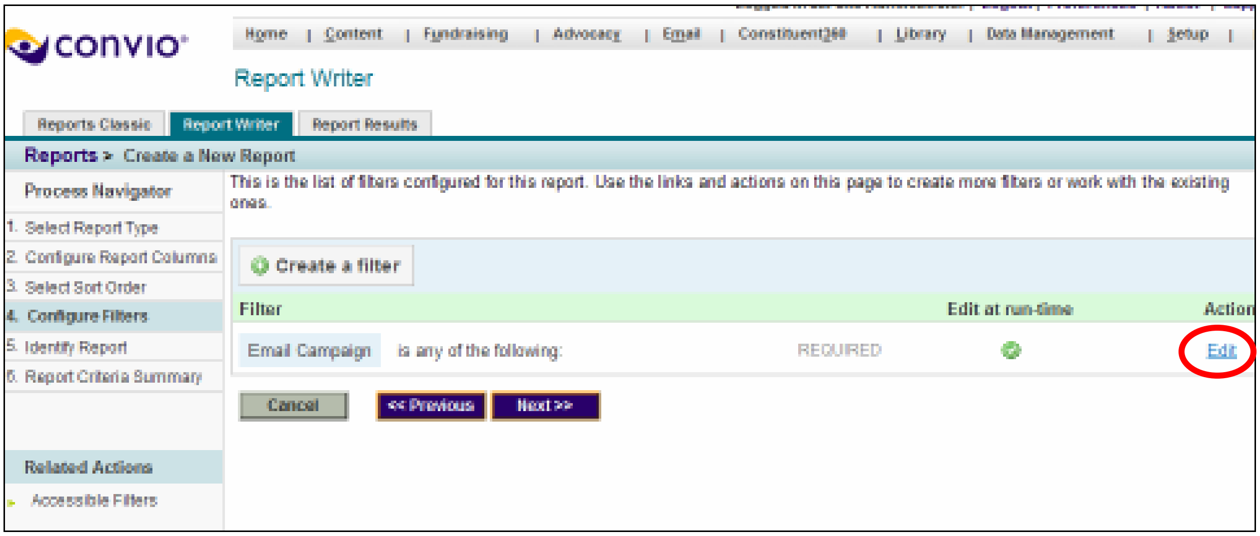
In Step 3, you can sort your search results using up to three columns. The columns available for sorting are the same columns you selected in the previous step that will be part of the report results. Once you select a sort column, select whether it will be in ascending or descending order. Click Next >>



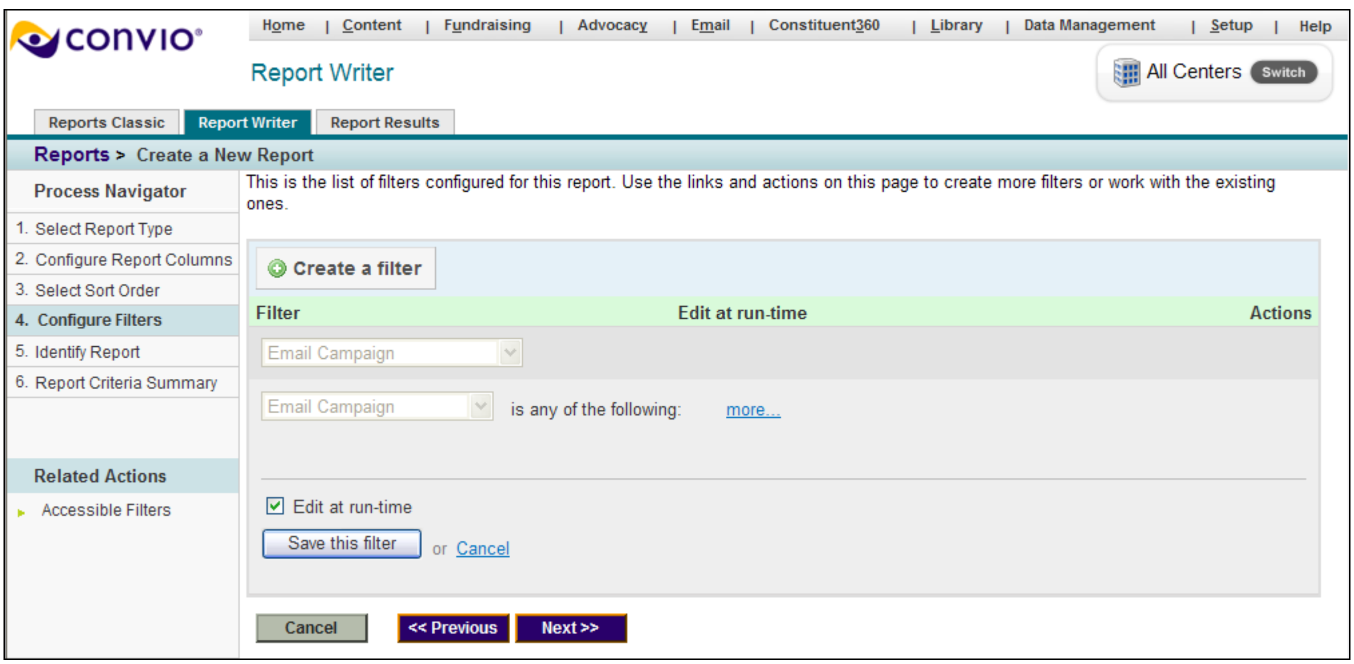
Configure Filters

In Step 4, you can use **filters** to further refine your search results. There will be at least one filter by default but you can use as many filters as you wish when creating report definitions.

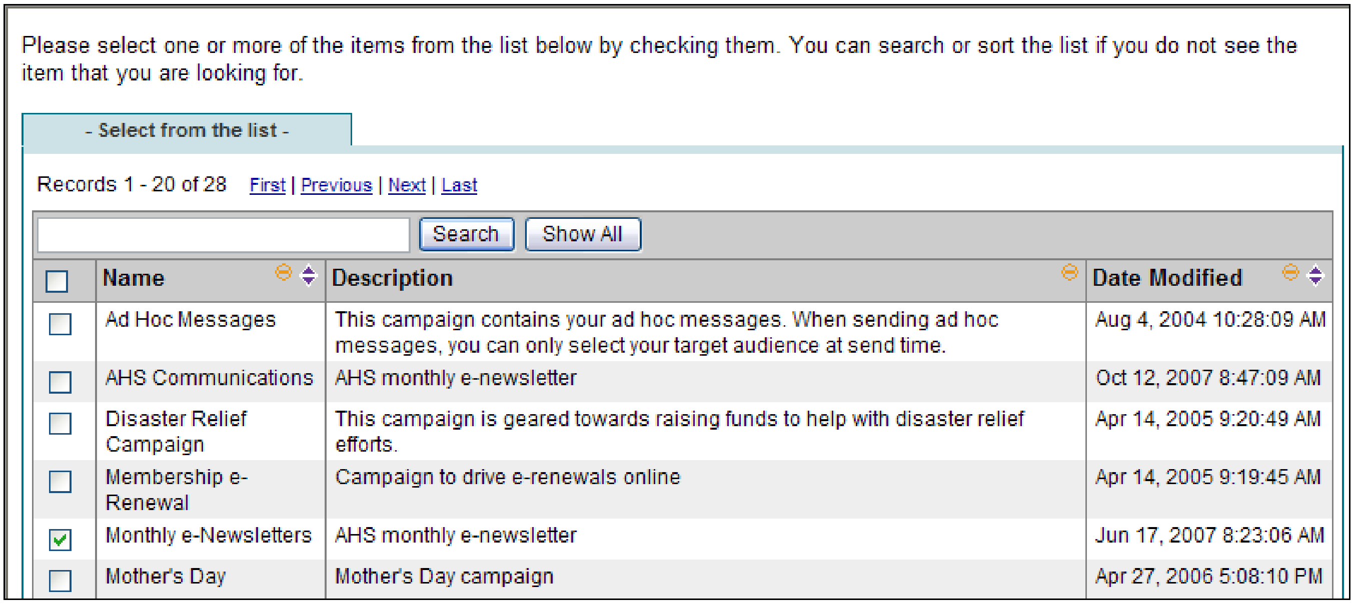
To edit the default filter, click ***Edit*** under the *Actions* column next to the filter.



To select a value for the filter, click ***More***…



Once you click ***More…,*** a browser window will open with the available selections. For some filters, you can only select one option; for others, you can select all that apply. Once you've made your selections, click ***Apply*** at the bottom of the window.


Please select one or more of the items from the list below by checking them. You can search or sort the list if you do not see the item that you are looking for.

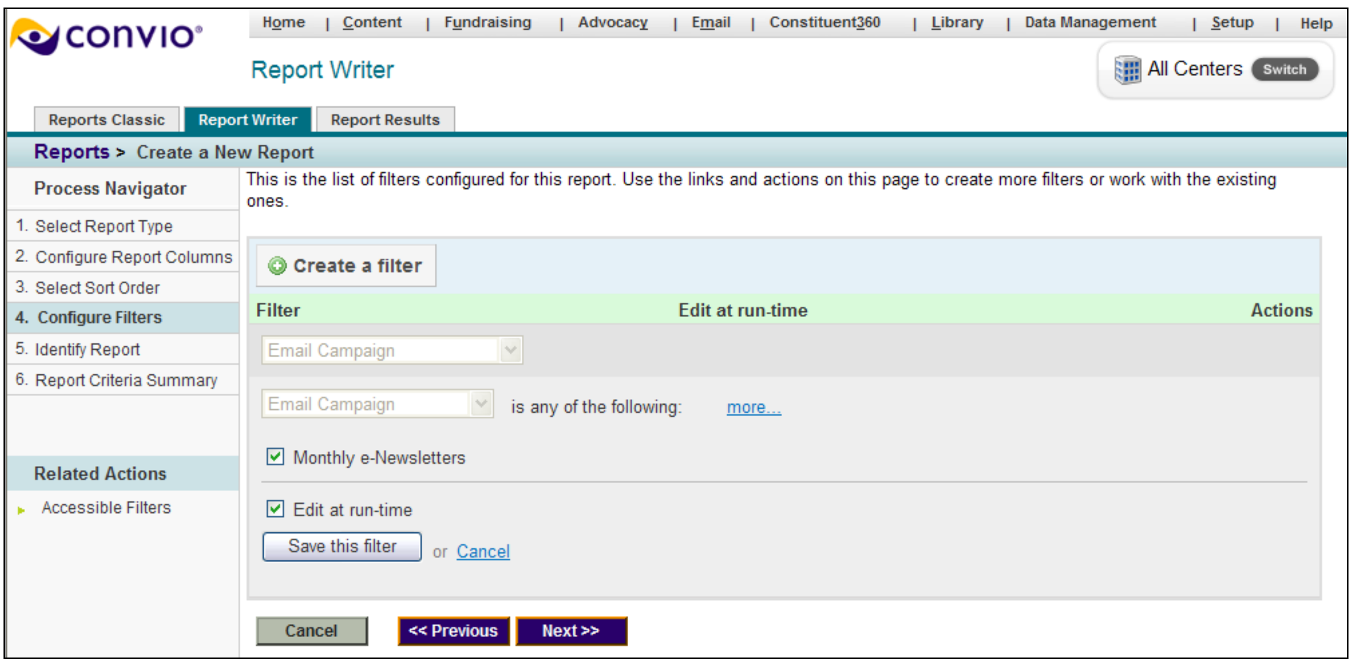
- Select from the list -

Records 1 - 20 of 28 First | Previous | Next | Last

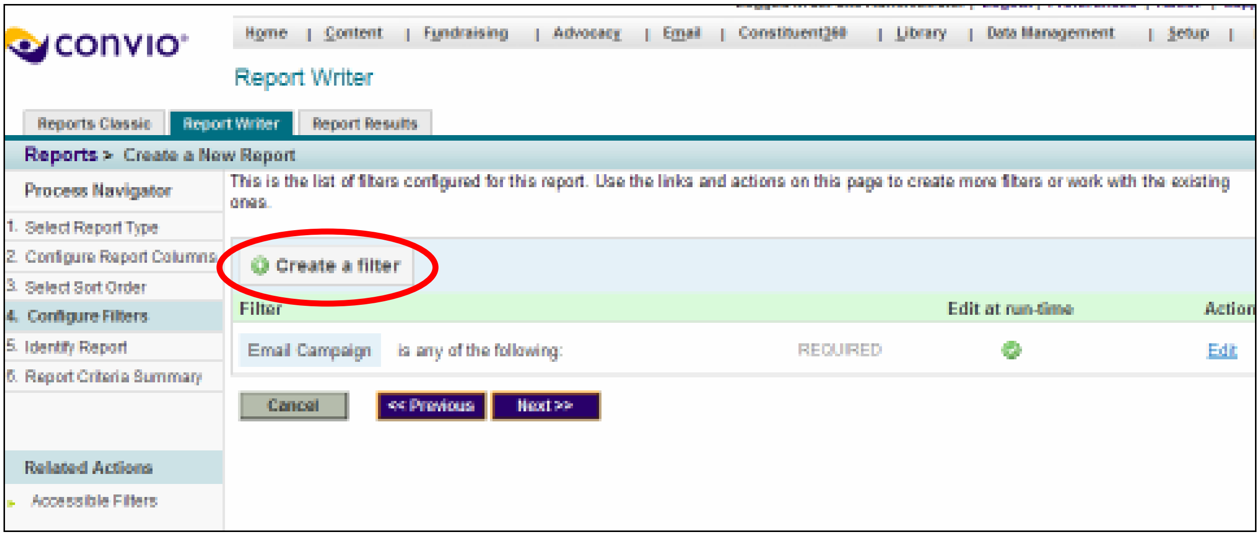
Search Show All

☐	Name	Description	Date Modified
☐	Ad Hoc Messages	This campaign contains your ad hoc messages. When sending ad hoc messages, you can only select your target audience at send time.	Aug 4, 2004 10:28:09 AM
☐	AHS Communications	AHS monthly e-newsletter	Oct 12, 2007 8:47:09 AM
☐	Disaster Relief Campaign	This campaign is geared towards raising funds to help with disaster relief efforts.	Apr 14, 2005 9:20:49 AM
☐	Membership e-Renewal	Campaign to drive e-renewals online	Apr 14, 2005 9:19:45 AM
☑	Monthly e-Newsletters	AHS monthly e-newsletter	Jun 17, 2007 8:23:06 AM
☐	Mother's Day	Mother's Day campaign	Apr 27, 2006 5:08:10 PM

Lastly, check the box next to *Yes, the filter values can be modified by others when running this report* if you want to allow anyone to have the ability to modify the filters when running the report. Click ***Save this Filter*** to return to the *Configure Filters* page.

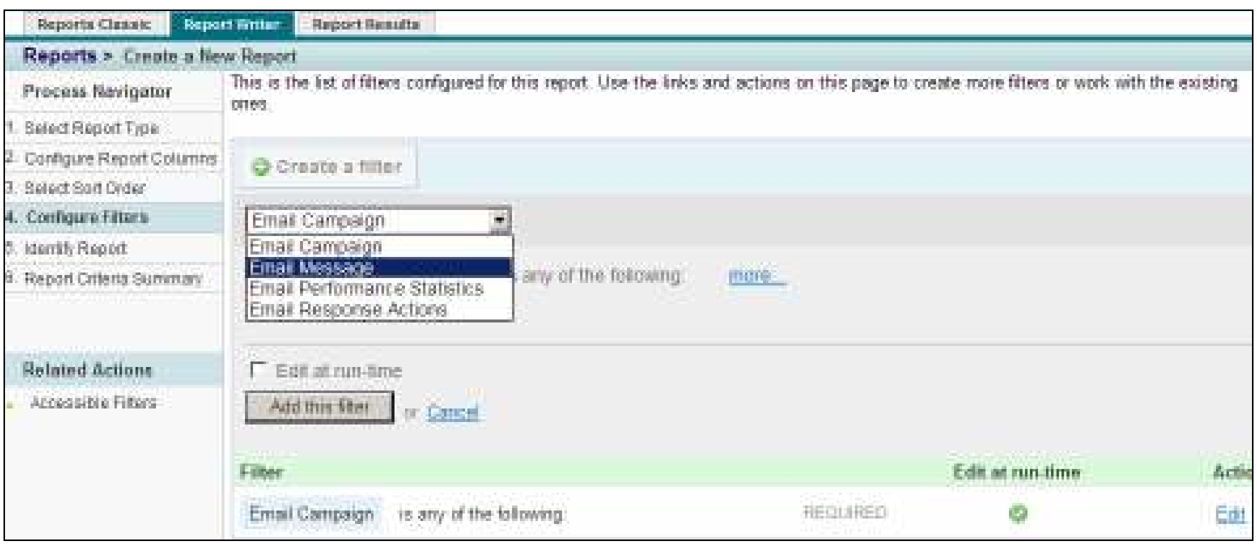


To add a new filter, click ***Create a filter*** in the upper-left corner.

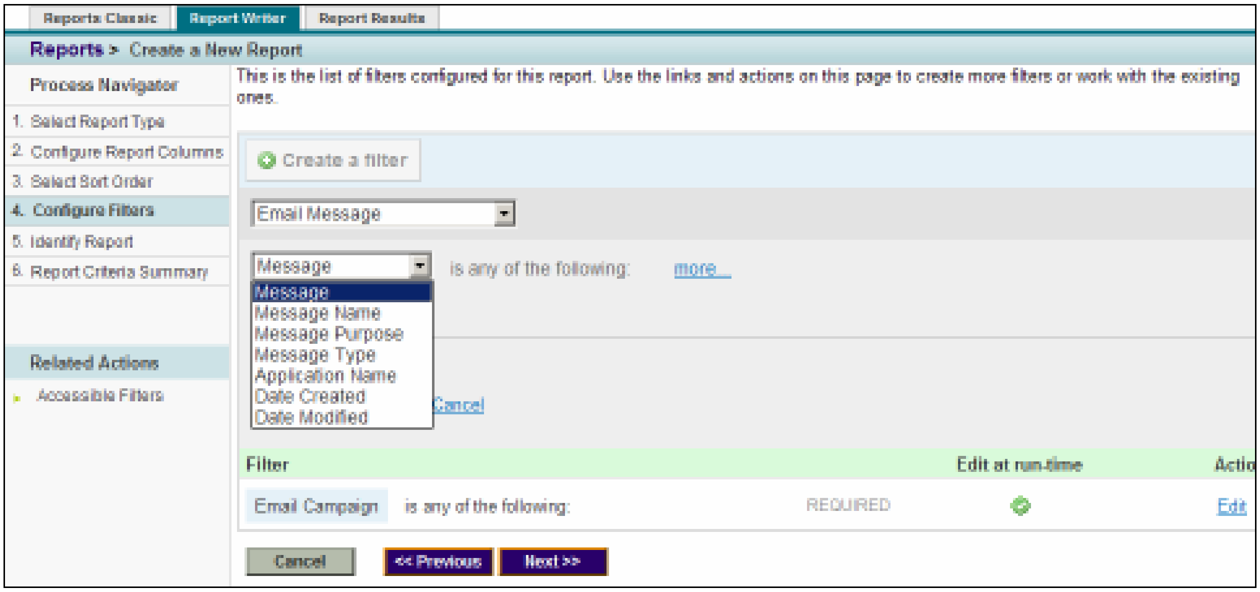


As an example, let's filter our report to only show results from a particular message in a particular campaign. NOTE: As you make a selection in one pull-down menu, a new pull-down menu will appear for you to make additional selections.

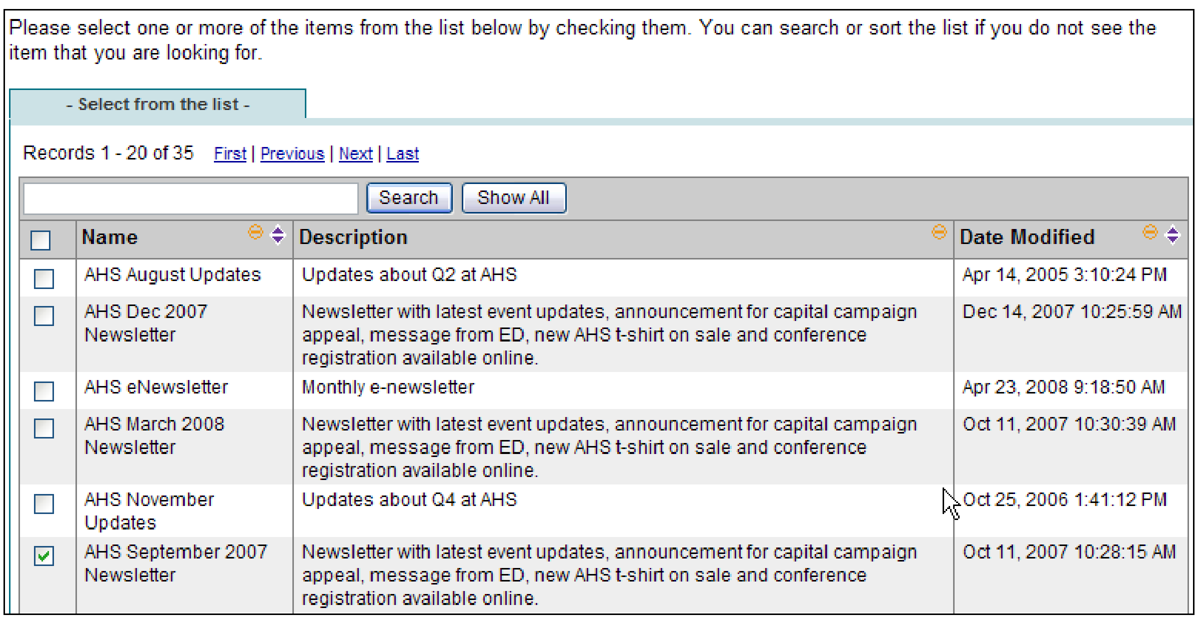
1. *Select the field group*. In this example, it would be ***Email Message***. Please note that there is already a default filter set up to limit our results to a particular campaign.



2. *Select the Field*. In this example, select ***Message***.



3. *Select a value or multiple values*. Click ***More…*** to select the message (or messages) on which you wish to report. Once you've made your selection(s), click ***Apply*** at the bottom of the window to save.


Please select one or more of the items from the list below by checking them. You can search or sort the list if you do not see the item that you are looking for.

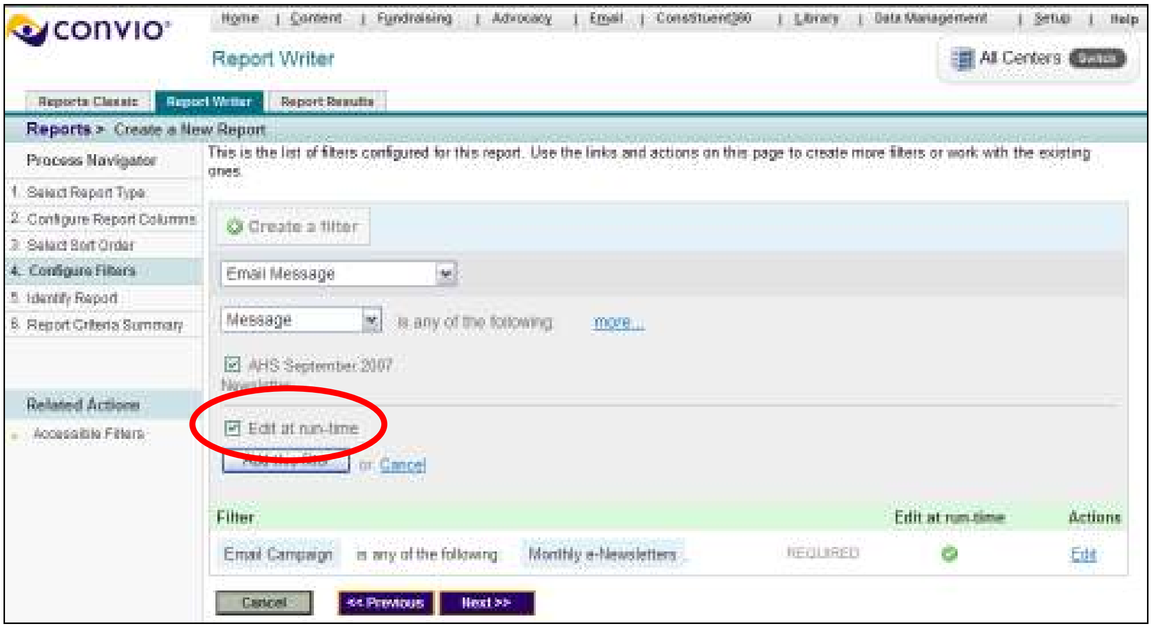
- Select from the list -

Records 1 - 20 of 35 First | Previous | Next | Last

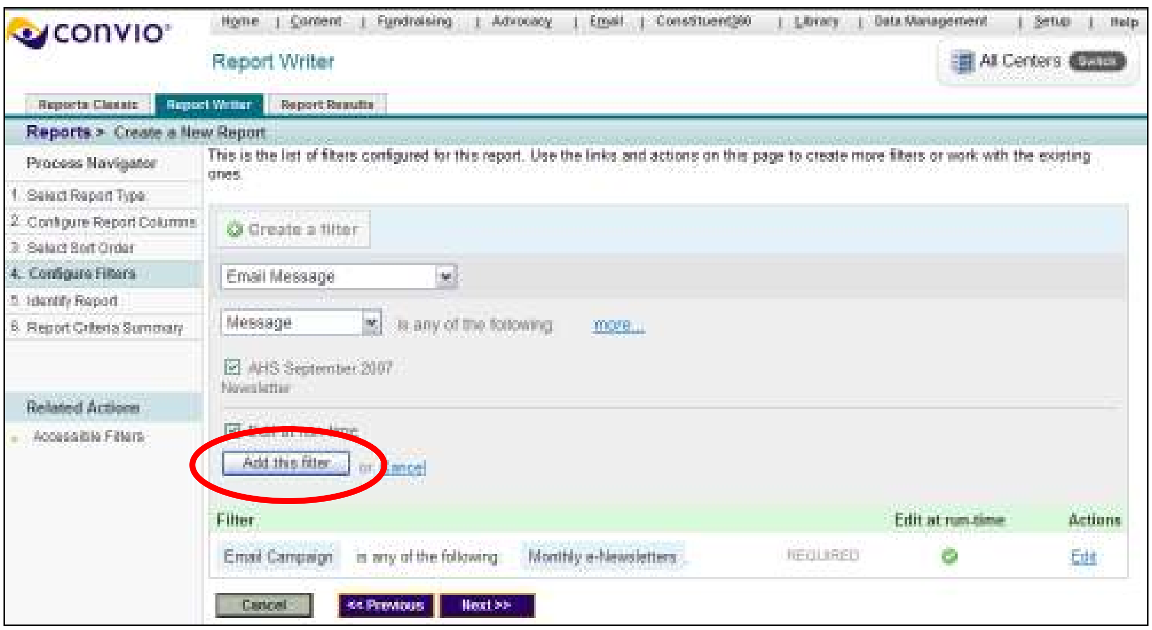
Search | Show All

	Name	Description	Date Modified
☐	AHS August Updates	Updates about Q2 at AHS	Apr 14, 2005 3:10:24 PM
☐	AHS Dec 2007 Newsletter	Newsletter with latest event updates, announcement for capital campaign appeal, message from ED, new AHS t-shirt on sale and conference registration available online.	Dec 14, 2007 10:25:59 AM
☐	AHS eNewsletter	Monthly e-newsletter	Apr 23, 2008 9:18:50 AM
☐	AHS March 2008 Newsletter	Newsletter with latest event updates, announcement for capital campaign appeal, message from ED, new AHS t-shirt on sale and conference registration available online.	Oct 11, 2007 10:30:39 AM
☐	AHS November Updates	Updates about Q4 at AHS	Oct 25, 2006 1:41:12 PM
☑	AHS September 2007 Newsletter	Newsletter with latest event updates, announcement for capital campaign appeal, message from ED, new AHS t-shirt on sale and conference registration available online.	Oct 11, 2007 10:28:15 AM

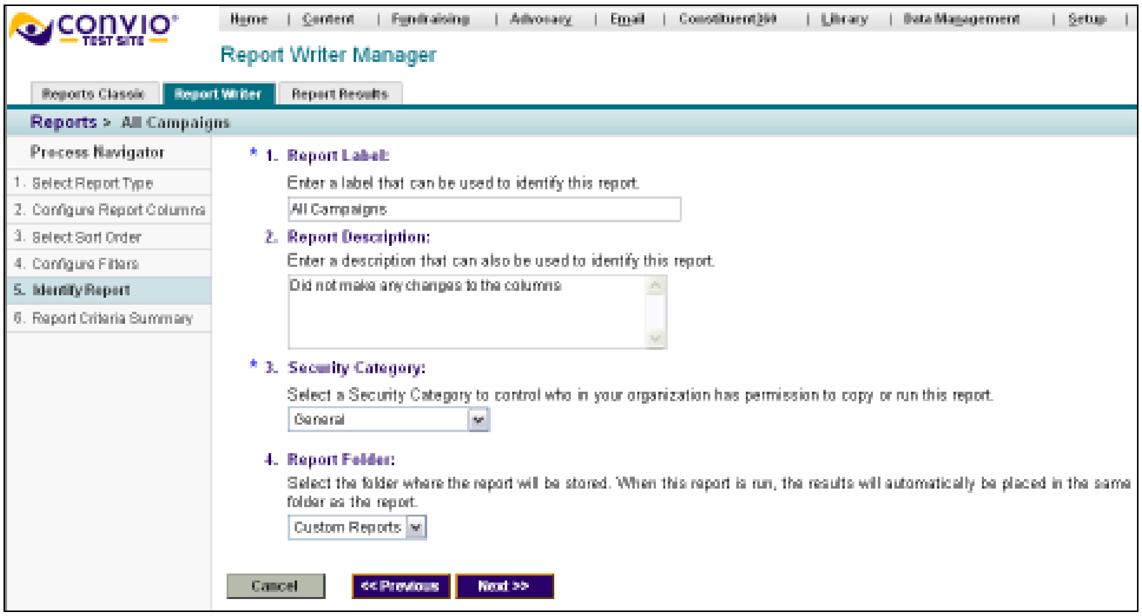
4. *Select whether or not the filter values can be modified by others when running this report.*



5. *Click **Add this filter** once you've made your selection.*



In Step 5, you will provide information to identify your report in the list of reports as well as determine who has access to your report. You can identify your report using both the **Report Label** and **Report Description**. When creating your **Report Label**, provide enough description to make it identifiable but at the same time, keep the label brief. Both the label and the description are searchable so any additional information should be entered in the description. The **Security Category** you assign to the report will determine who has access to the report. The **Report Folder** you select is where this report will be stored.

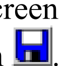


In Step 6, you'll be able to view a summary of the selections you made in the previous steps. After you've reviewed your selections you can either run the report or save the report to run at a future date.

If you decide to run the report, you will be walked back through the steps of editing filters and identifying the report. If you've just created the report and are arriving at this step, click Next >> to proceed to Step 1.c. and click Run Report.

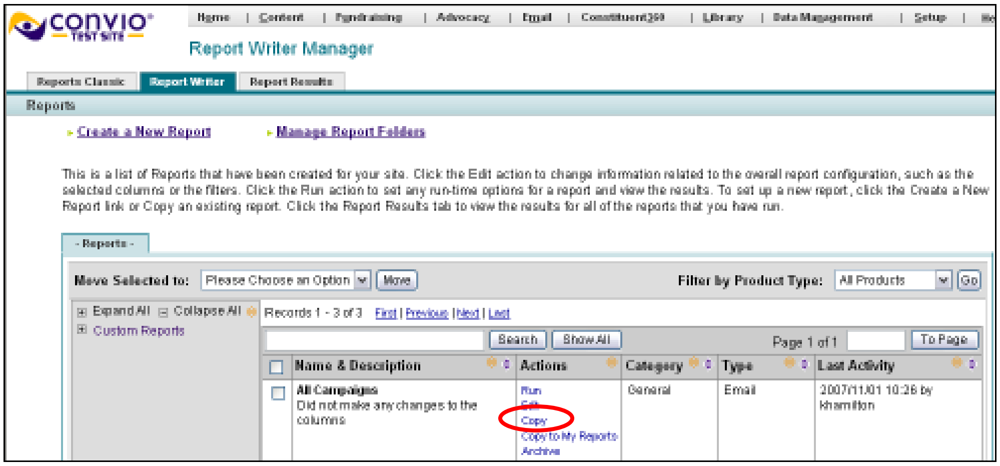
Exercise: Create a Report from a Model

Create a report that will generate the total number of hard bounces from the Email Campaign entitled "Monthly e-Newsletters" on the American Health Society training site.

1. From the AHS administrator home page, click ***Data Management > Reports***. Click the ***Report Writer*** tab.
2. Click ***Create a New Report***.
3. For Report Type, select ***Email***. Click ***Next***
4. For Available Reports, select ***Email Messages***. Click Next >>
5. For Step 2, do the following:
    a. Remove the ***Email Campaign Type*** column from the report.
    b. Rearrange the columns so the first column is ***Message Name***.
    c. Add the ***Number of Hard Bounces*** column as the last column of the report and rename it to ***Hard Bounces***
6. Click Next >>
7. For Step 3, sort by ***Message Name*** in ascending order. Click Next >>
8. For Step 4, click ***Edit*** next to the default filter. Click More to view a list of available campaigns. Check the box next to ***Monthly e-Newsletters*** and click Apply. Click Finish. Click Next >>
9. For Step 5, enter a label and a description for your report. For Security Category, select ***General*** and for Report Folder, select ***Custom Reports***. Click ***Next*** >>
10. For Step 6, review your selections and click Run Report.
11. For Runtime Parameters, click Next >>
12. For Identify Result, click Next >>
13. For Report Type Summary, click Run Report.
14. Your report results will display. You can view them on the screen or download them into various formats (CSV, HTML, PDF) by clicking the disk icon .

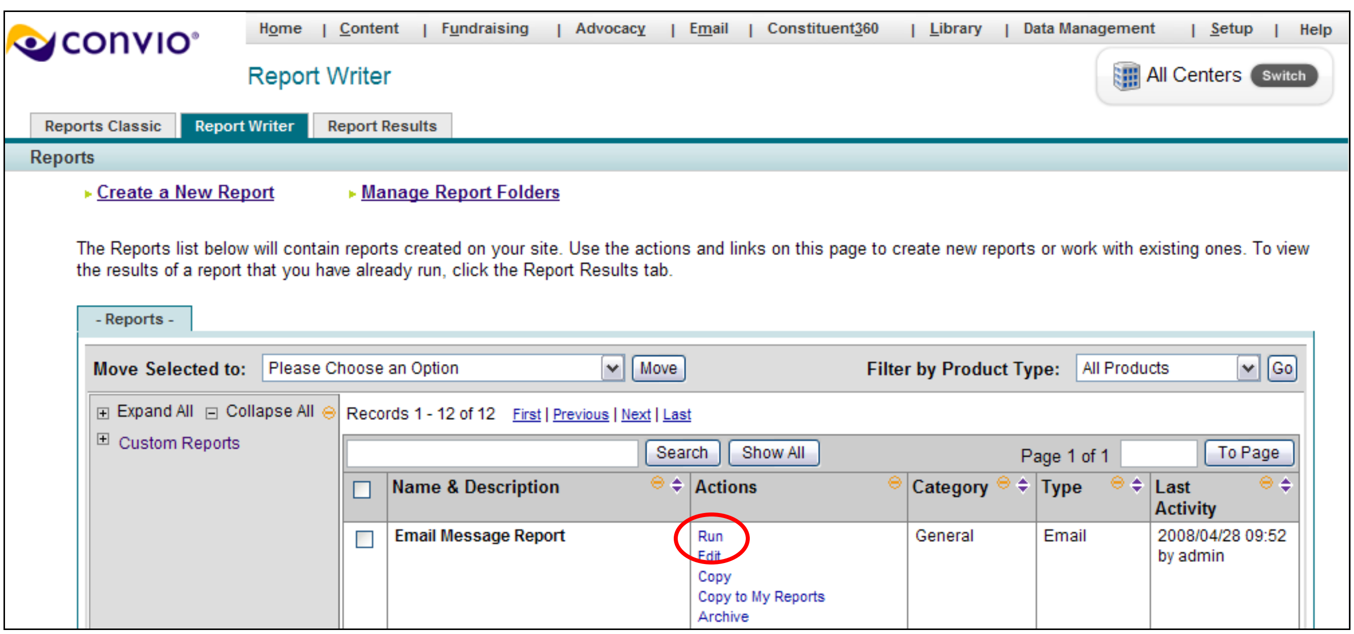
Create a Report from a Copy

You can also create a report from a copy. In order to do this, go to the ***Reports List*** page and find the report you wish to copy. Click ***Copy*** and you will be walked through the same steps as if you were creating the report from a model.



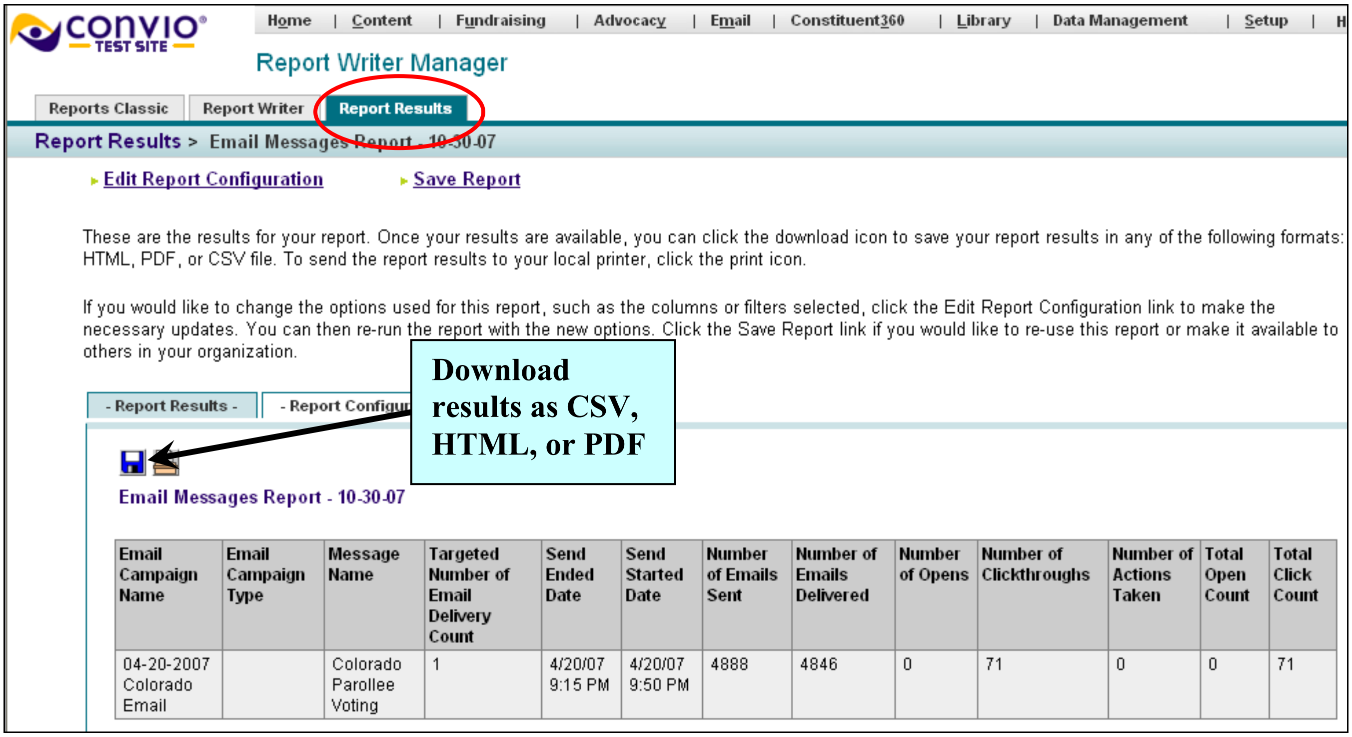
Running Reports and Accessing Results

To run a report, go to the ***Reports List*** page and find the report you wish to run. Once you click ***Run***, you will be given the opportunity to modify any filters that can be modified. Just a reminder – it is up to the author of the report to determine whether filters can be modified when running a report.



After modifying any filters, you can then change the name of the report and proceed to Step 1.c where you can run the report.

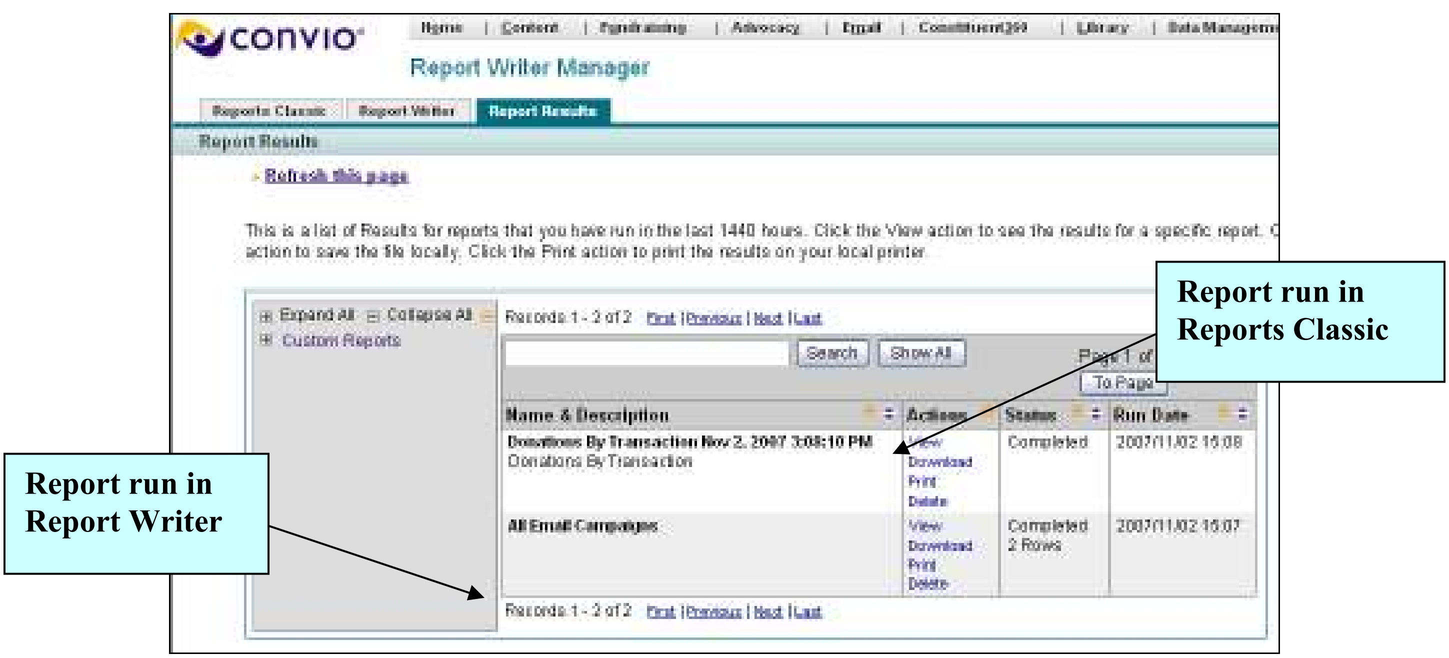
Once you run the report, the results will appear under the *Report Results* tab.



At this point, you can download your results in any of the following formats: CSV, HTML, or PDF. **NOTE**: If you would like to re-run this report, don't forget to save your report by clicking ***Save Report*** at the top of the page!

Accessing Report Results

Whether you've run your report using Reports Classic or Report Writer, you will access your results from the *Report Results* page. To access this page, go to ***Data Management > Reports***. Click the ***Report Results*** tab.



There are several available actions for each report from this page. Click:

- ***View*** to view your report results on the screen.
- ***Download*** to download your results in any of the following formats[3]: CSV, HTML, or PDF
- ***Print*** to print a printer-friendly version of your on-screen results
- ***Delete*** to delete the report results

Exercise: Download Report Results

Find the report you created in the previous exercise and download the results as a PDF.

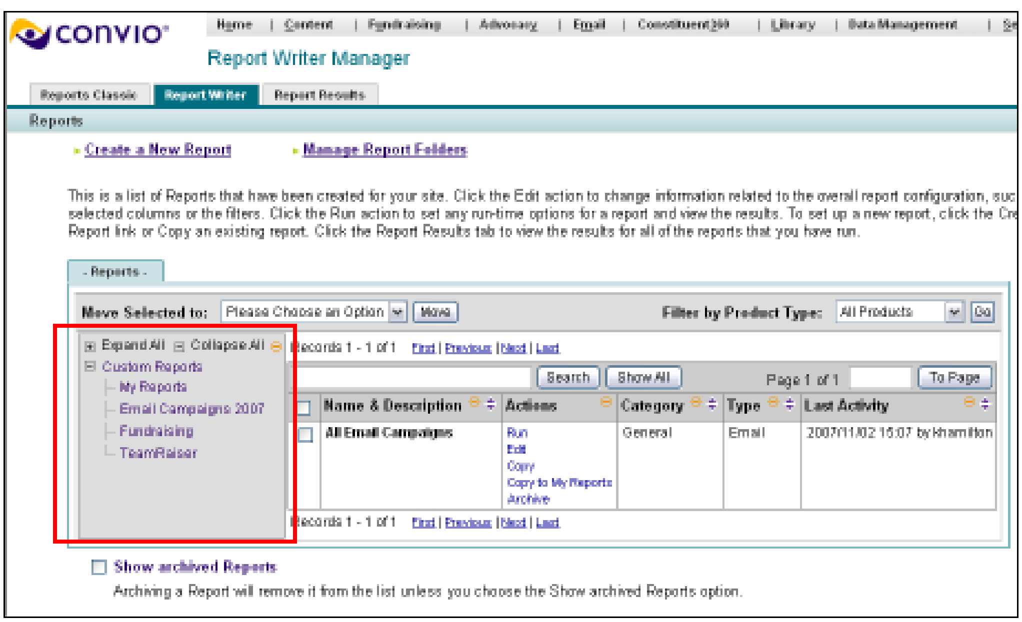
1. From the AHS administrator home page, click ***Data Management > Reports***. Click the ***Report Results*** tab.
2. Search the list and locate the report you ran from the previous exercise.
3. Once you've located your report, click ***Download*** under the *Actions* column.
4. From this page, click ***Download*** under "PDF - Adobe Acrobat Portable Document Format" and download your report results.

Report Folders

To help organize the reports for your site, you can create a structure of top-level and sub-level folders. You can then assign your reports to those folders when creating new reports or directly from the Report List itself.

Once your structure is in place, you can select a folder in the folder directory tree at the left of the Report List to display only the reports in that folder. This is especially helpful if you run many reports.

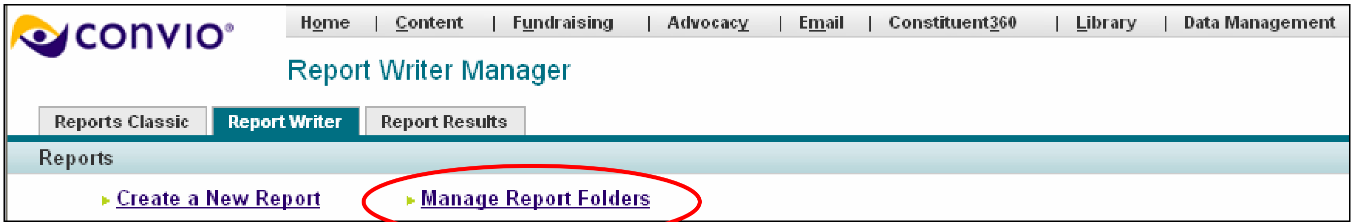
- **When you run a report that is in a folder, the results will also be placed in that folder, so you are simultaneously organizing your report configurations and your report results.**



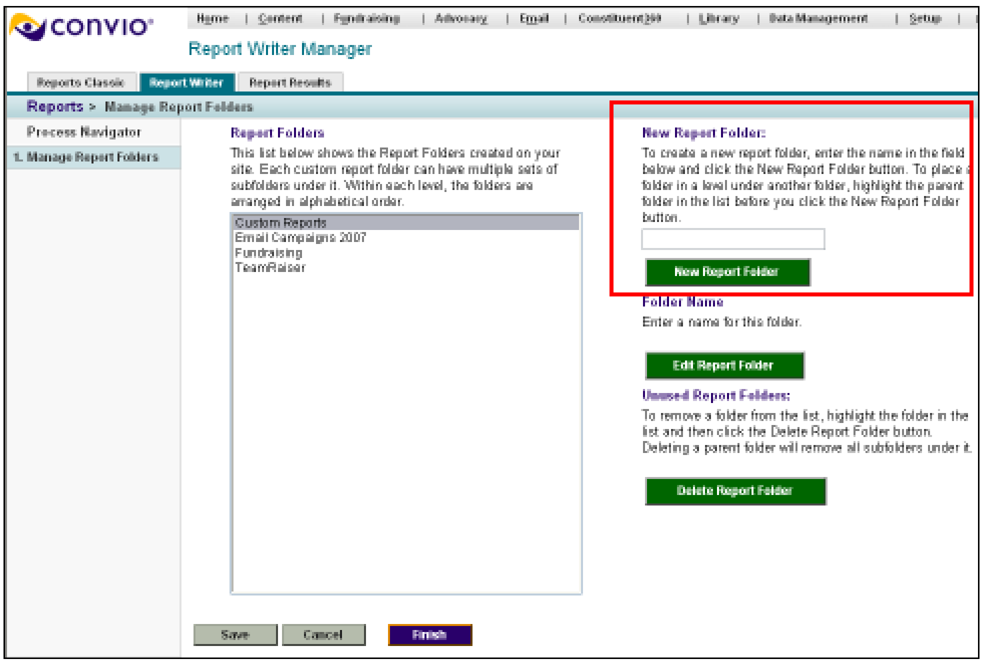
[3] For reports run using Reports Classic, only CSV format is available.

Creating a Report Folder

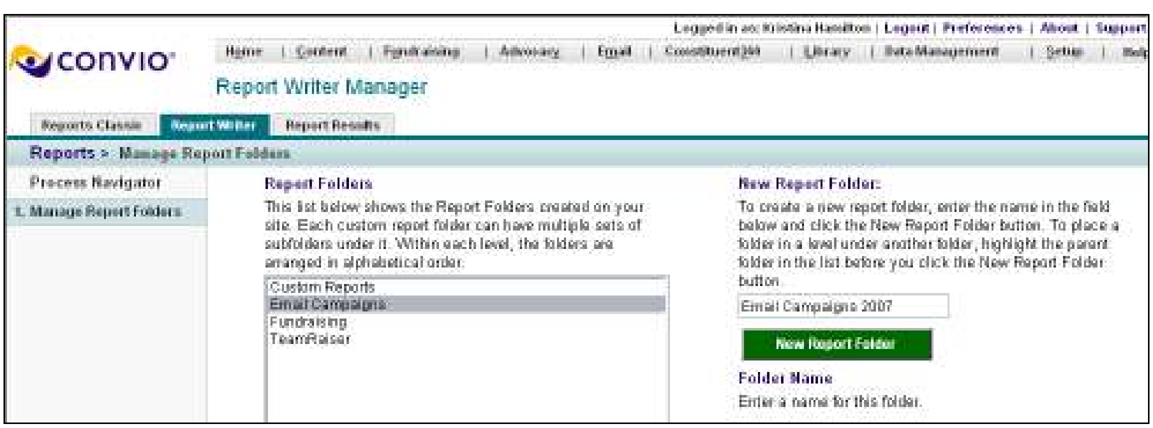
To create a new report folder, click ***Manage Report Folders*** at the top of the Reports List page.



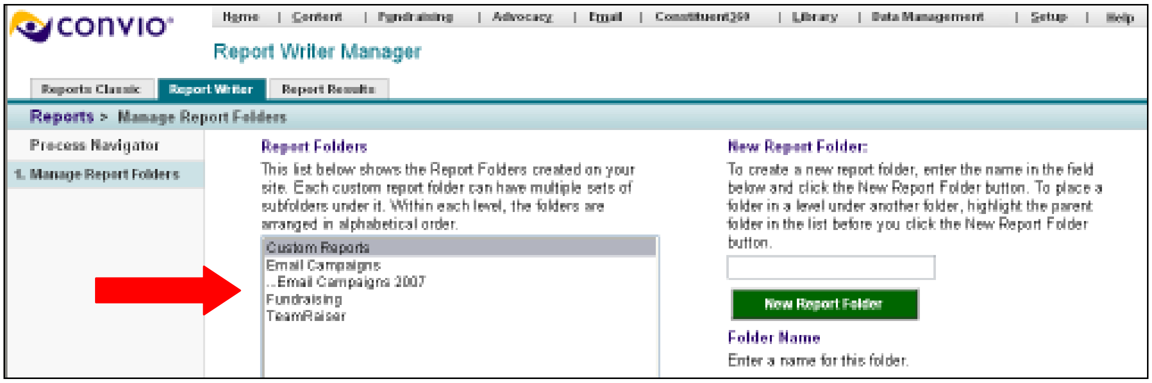
Once you're on this page, you'll see a list of report folders that have already been created. To create a new folder, enter the label for your new folder in the text field on right side of the page. Then click New Report Folder.



To create a sub-folder, make sure the top level folder is selected in the list of folders before you enter the sub-folder name and click New Report Folder.



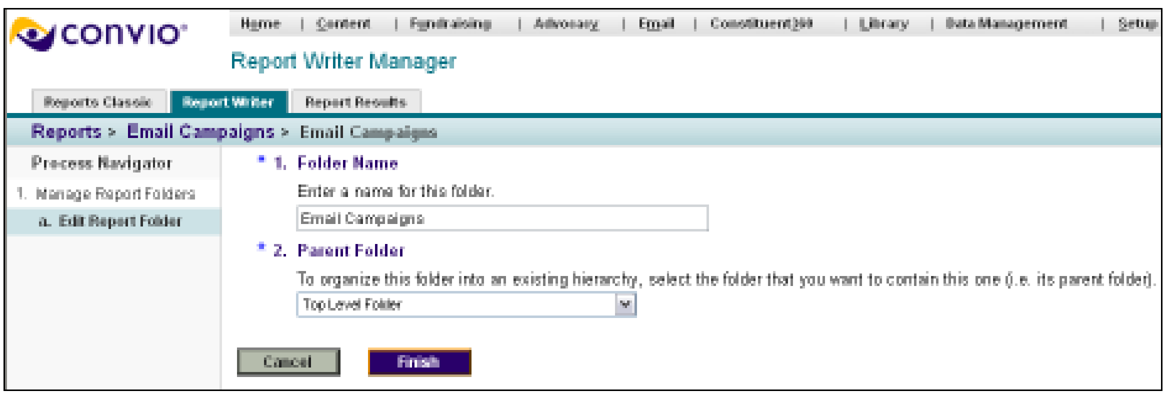
Once you create a new sub-folder it will appear underneath the top level folder.



Once you've created your folders, click Finish to return to the Reports List page.

Editing or Deleting Folders

You can also edit folders and delete folders from this page. *To edit a folder*, highlight the folder name in the list and click Edit Report Folder. Once you click this button, you can rename the folder or change the hierarchy of the folder. Click Finish to save your changes.



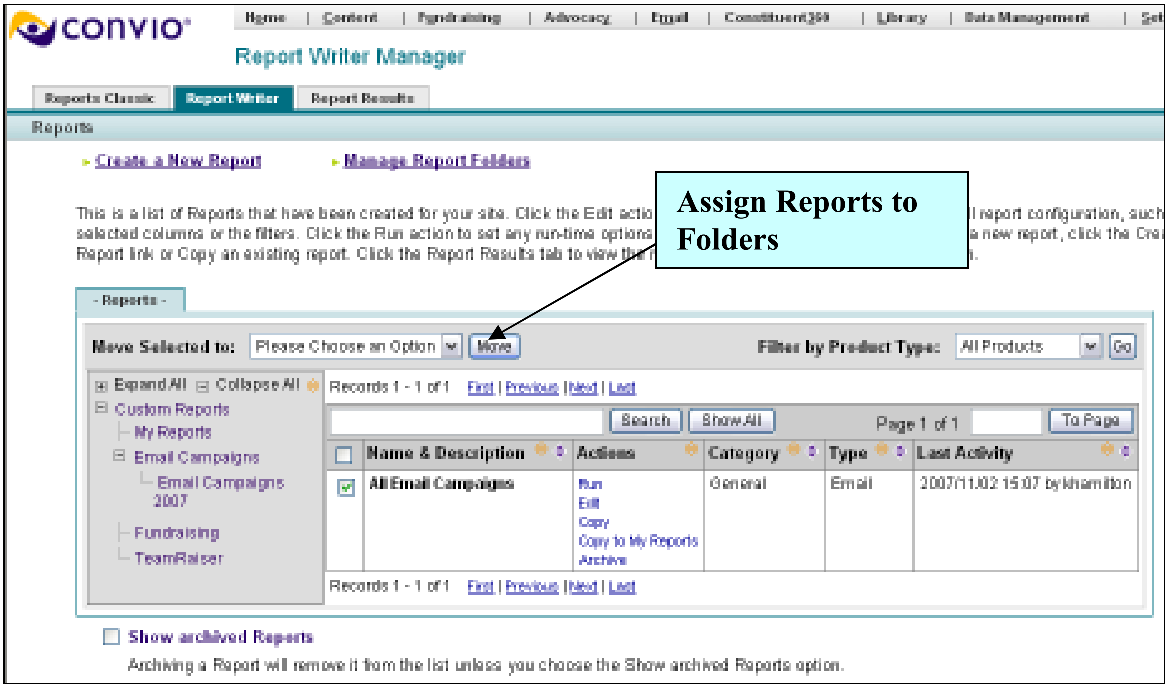
To delete a folder, highlight the folder name in the list and click Delete Report Folder. Deleting a parent folder will remove all subfolders under it.

- **Deleting a folder will not delete the reports in the folder. The reports in a deleted folder will move up to the parent folder, and, if there is no parent folder, they will still display when you click Top Level Folder.**

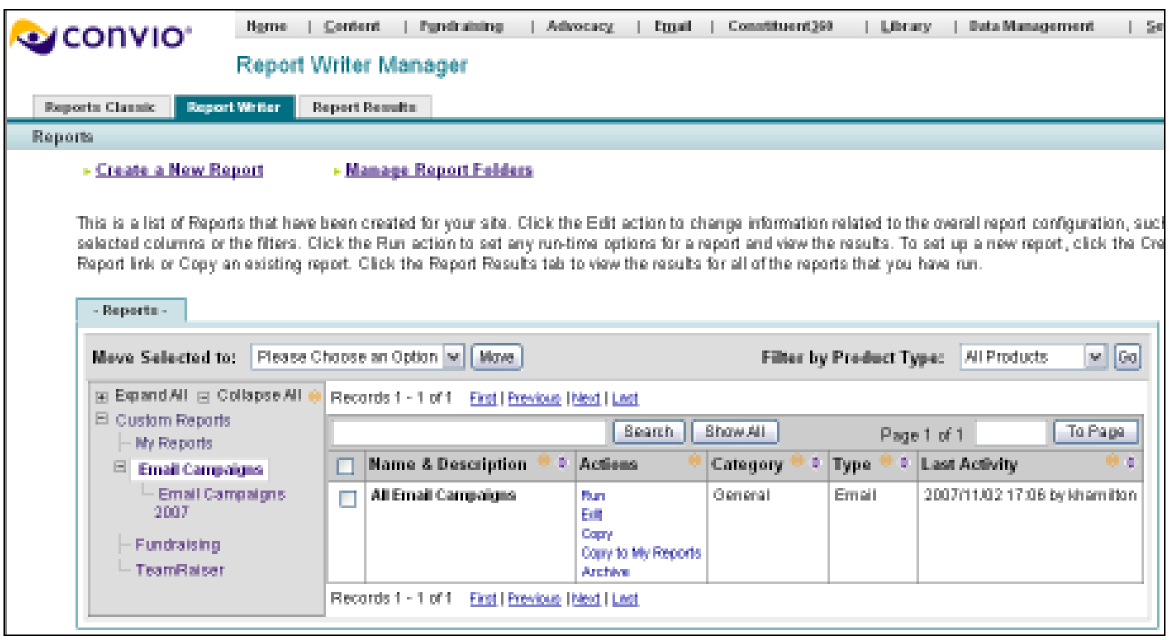
Managing Report Folders from the Reports List Page

From the Reports List page, you can assign your reports to a folder and also display reports in a specific folder.

To assign a report to a folder, check the box to the left of the report name. Next, from the *Move Selected To* pull-down menu, select the folder under which you would like to store your report.



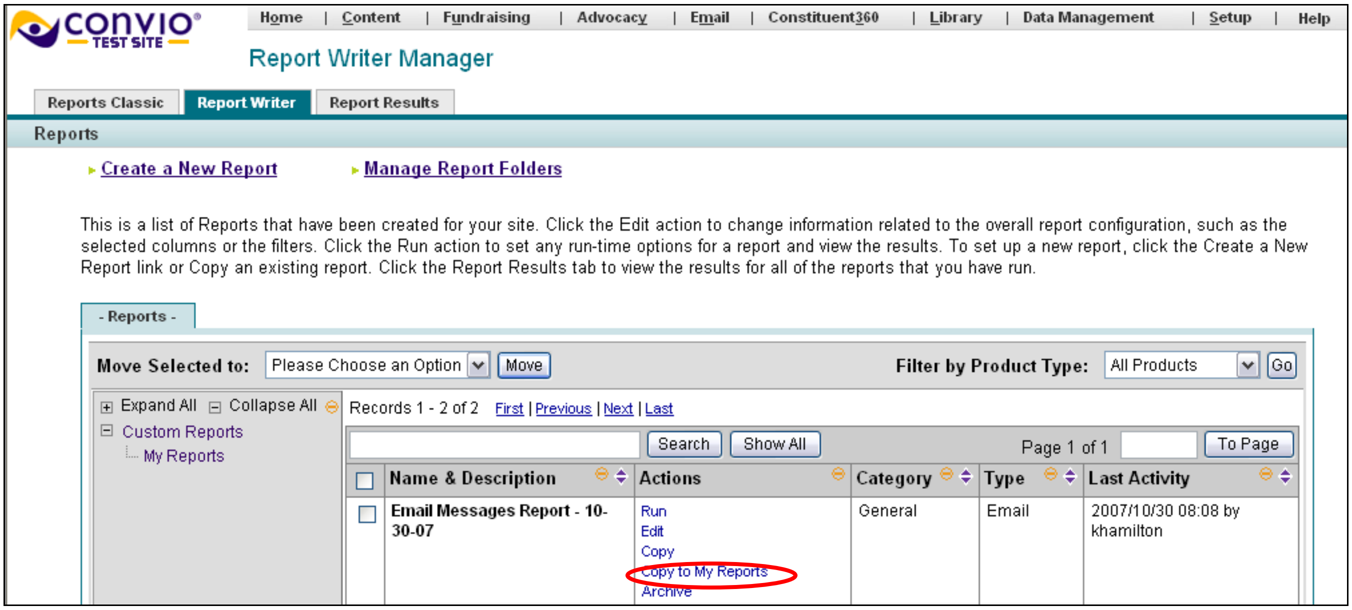
To display reports in a specific folder, highlight the folder name in the list of folders on the left. If your folder is not displaying, click "+" to expand the folder tree and search for your folder.



Copying a Folder to the My Reports Folder

If you have permission to copy reports, you will be able to copy reports to your *My Reports* folder. Keeping the reports that are of interest to you in your own folder will serve as a convenience -- especially if there are many reports on your site. NOTE: When you run the reports in your *My Reports* folder, the results will also be placed in that folder.

To copy a folder to your My Reports folder, find your report in the list and click ***Copy to My Reports*** in the *Actions* column. To verify that the report has been copied to your *My Reports* folder, expand the *Custom Reports* folder, then click the ***My Reports*** folder to display the contents of that folder. Verify that the report you just added is in the list.



Exercise: Create a New Report Folder

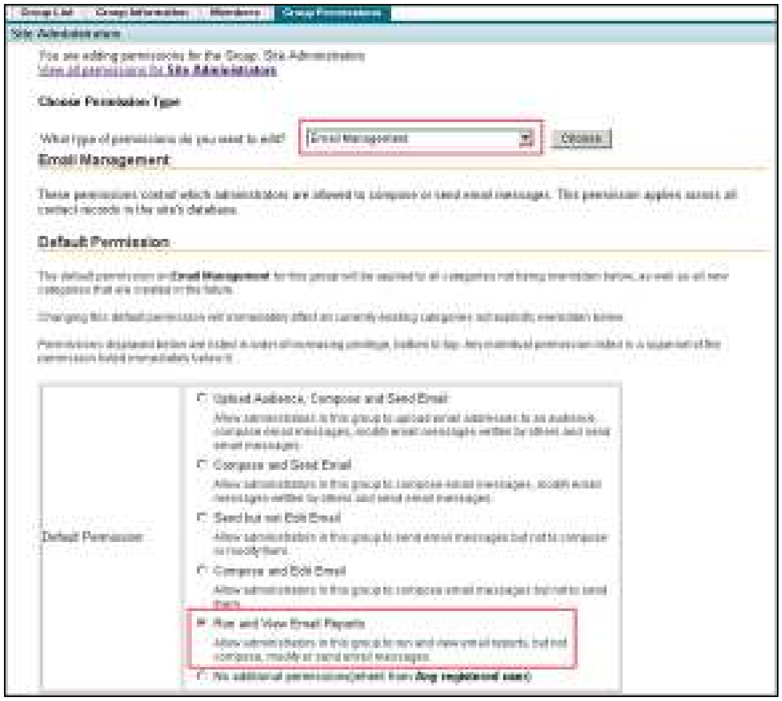
Create a new report folder and assign the report you saved earlier to that folder.

1. Go to ***Data Management > Reports***. Click the ***Report Writer*** tab.
2. Click ***Manage Report Folders***.
3. Make sure *Custom Reports* is highlighted in the list of folders. Enter your folder name in the text field provided and click New Report Folder. Click Finish.
4. Once you're back on the Reports List page, find the report you created earlier. Once you have found the report, check the box next to the report.
5. In the *Move Selected to*: pull-down menu, select your report folder and click ***Move***.
6. To make sure your report is stored in your folder, ***expand Custom Reports*** and you will see your folder in the list. ***Click your folder name*** and your report will display.

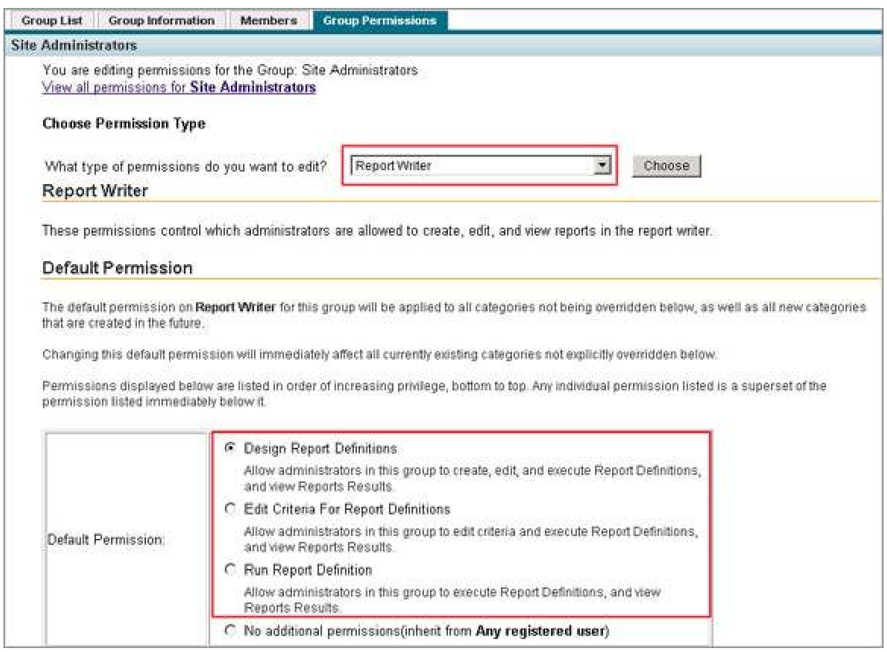
Permissions

The Report Writer has three tiers of permissions to help you control the amount of access administrators have to certain reports. The top level allows the administrator to design, edit, and run reports. The second level allows the administrator to edit and run reports. The third level allows the administrator to run reports.

Before setting up the Report Writer permissions, the administrator must have permission to run reports for the application for which they will use the Report Writer. For example, if to use the Report Writer to run Email Campaign Reports, an administrator must have permission (within Email Management) to run Email Campaign Reports, as shown below:



You must also have one of the three levels of Report Writer permissions:



The three possible permission sets for the Report Writer are described in more detail below:

- **Design Report Definitions** -- this role includes the ability to design new reports from a model or from a copy. Those with the Designer role can fully edit their own reports and run all reports that appear in the Security Categories to which they have access.
- **Edit Criteria for Report Definitions** -- this role includes the ability to copy Classic Reports and reports created by others and then perform a more limited editing of the "new" versions. Those with this role can add, edit, and delete filters for their new reports, determine the sort order of

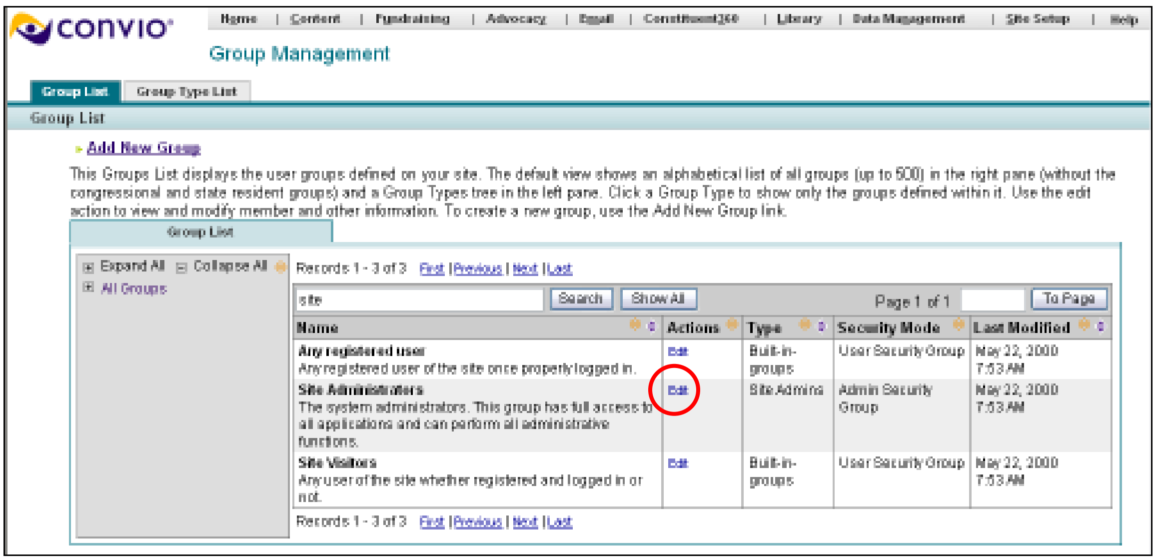
results, and save (and/or run) the new report configurations. They cannot, however, change the model on which a report is based, nor can they change the columns that appear in a report.

- **Run Report Definition** -- this role includes the ability to modify certain filters at runtime and view report results.

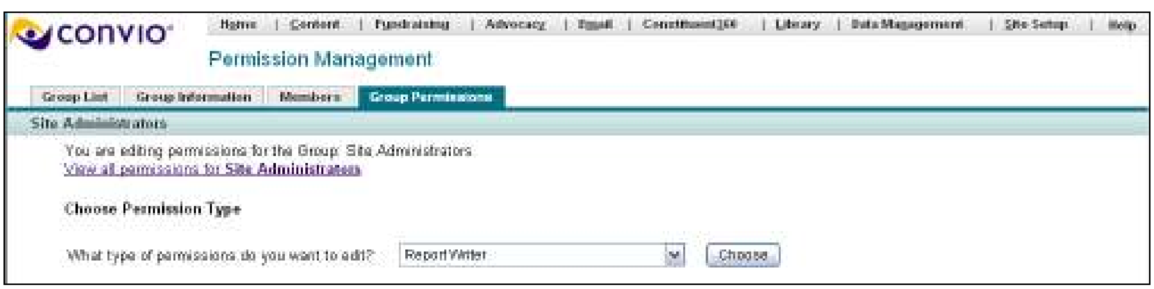
- **Site Administrators, by default, have full permissions for the applications that are operational on their site, including the Report Writer. They can assign other permissions to groups of Junior Administrators, as needed. Like everyone else, however, site administrators can *only view results* for reports that they themselves have run.**

Setting Up Permissions

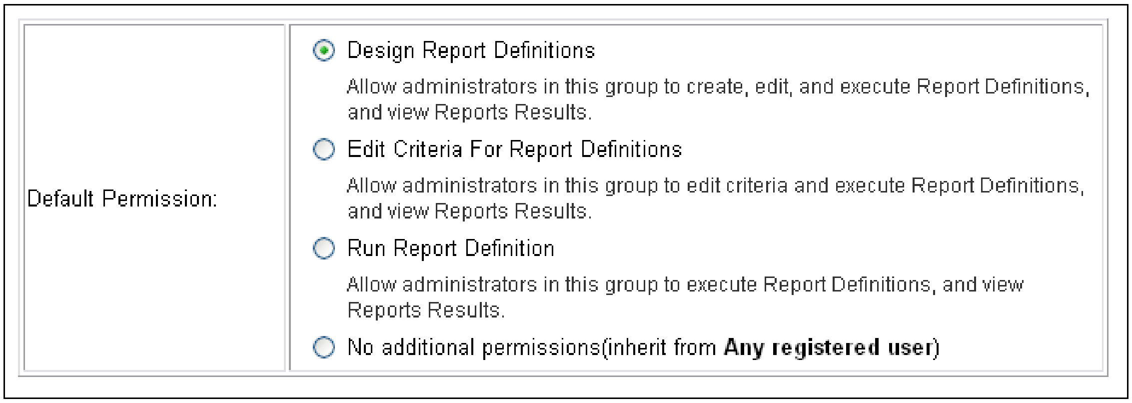
To set up Report Writer permissions, go to ***Constituent360 > Groups***. From here, search for the administrator group to which you are assigning the permissions. Once you find the group, click ***Edit***.



Click the ***Group Permissions*** tab. From the pull-down menu, select ***Report Writer***. Click Choose.

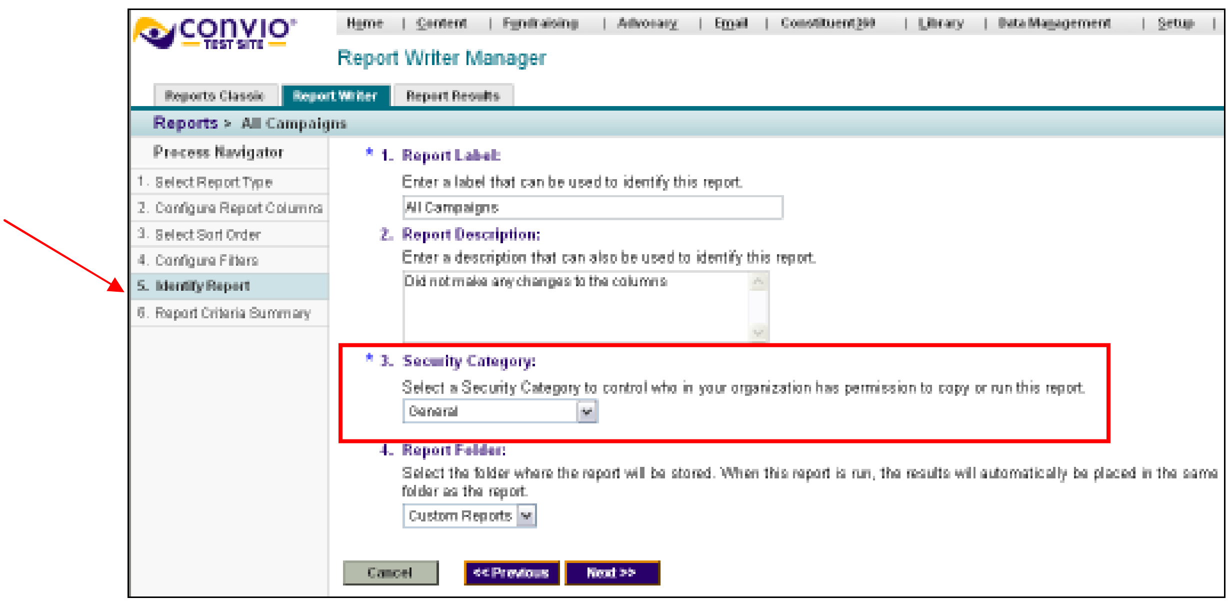


On this page, select which of the three levels of access to assign to the group:



Security Categories

An additional way to control access to certain reports is through the use of Security Categories. When creating a report, you can assign it to a particular Security Category and then only those administrators in that Security Category will have access to that report. To access the Security Category of a particular report, go to Step 5 in the Process Navigator for creating a report.



Additional Resources

The HELP section contains two very useful resources when working with Report Writer:

1. **Samples of Reports** – To access samples of reports, click HELP in the navigation menu from the Report Writer main page. Then click the link that correlates to the module from which you are generating the report (ex. *Using the Email Report Models*). On the next page, click the preview icon next to the report you wish to view.
2. **Metric Glossary** – The metric glossary defines the different columns of data that are available when creating reports. To access the glossary,
    a. Click HELP in the navigation menu from the Report Writer main page.
    b. Click the link that correlates to the module from which you are generating the report (ex. *Using the Email Report Models*).
    c. Click the link of the report you wish to run. Scroll down the instructions for creating a report until you see the list of available columns.
    d. Click on any of the column names to access the metric glossary for that particular report.