

Administrator Training

Report Writer

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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.

convio
TEST SITE

Home | Content | Fundraising | Advocacy | Email | Constituent360 | Library | **Data Management** | Setup | Help

Report Writer Manager

Reports Classic | **Report Writer** | Report Results

Reports

► [Create a New Report](#) ► [Manage Report Folders](#)

This is a list of Reports that have been created for your site. Click the Edit action to change information related to the overall report configuration, such as the selected columns or the filters. Click the Run action to set any run-time options for a report and view the results. To set up a new report, click the Create a New Report link or Copy an existing report. Click the Report Results tab to view the results for all of the reports that you have run.

- Reports -

Move Selected to: Please Choose an Option ▼ Move Filter by Product Type: All Products ▼ Go

Expand All Collapse All Custom Reports

Records 1 - 2 of 2 First Previous Next Last

<input type="checkbox"/>	Name & Description	Actions	Category	Type	Last Activity
<input type="checkbox"/>	All Campaigns Did not make any changes to the columns	Run Edit Copy Copy to My Reports Archive	General	Email	2007/10/30 09:27 by khamilton

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

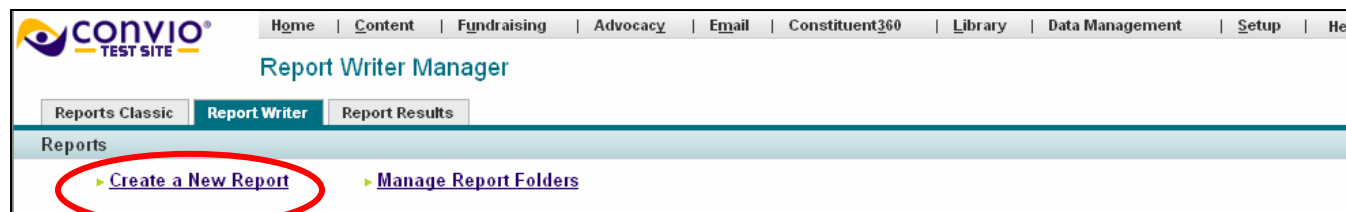
Create a New Report

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.

Process Navigator
1. Select Report Type
2. Configure Report Columns
3. Select Sort Order
4. Configure Filters
5. Identify Report
6. Report Criteria Summary

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.

The screenshot shows a web interface for editing a column. At the top, there are navigation links: 'Previous Column' (with a left arrow) and 'Next Column' (with a right arrow). The title 'Email Campaign Name' is centered. Below this is a tab labeled 'Edit Column'. The main content area is titled '1. Column Name:' and contains the instruction 'Enter the name of the column for your report.' Below the instruction is a text input field containing 'Email Campaign Name', which is circled in red. At the bottom, there are three buttons: 'Cancel', '<< Previous', and 'Next >>'.

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 >>**

The screenshot shows the 'Report Writer Manager' interface. On the left is a 'Process Navigator' with six steps: 1. Select Report Type, 2. Configure Report Columns, 3. Select Sort Order (highlighted), 4. Configure Filters, 5. Identify Report, and 6. Report Criteria Summary. The main area is titled '1. Report Results Sorting:' and contains the instruction 'Select up to three columns that you would like to use for sorting the report results. For each column that you select, also choose whether the sort should be in ascending or descending order. For example, you might sort first by Campaign Name; then, within each campaign you could sort by Message Name, and within each message you could sort by Recipient Last Name.' Below this are three sections for selecting sort columns and their order. Each section has a 'Sort Column' dropdown and a 'Sort Order' dropdown (with 'Ascending' selected). An arrow points from the 'First Level - Sort Column' dropdown to a detailed list of available columns. The list includes: 'Please Choose a Column', 'Email Campaign Name', 'Email Campaign Purpose', 'Email Campaign Type', 'Message Name', 'Targeted Number of Email Delivery Count', 'Send Ended Date', 'Send Started Date', 'Number of Emails Sent', 'Number of Emails Delivered', 'Number of Opens', 'Number of Clickthroughs', 'Number of Actions Taken', 'Total Open Count', and 'Total Click Count'.

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.

The screenshot shows the Convio Report Writer interface. The top navigation bar includes links for Home, Content, Fundraising, Advocacy, Email, Constituent360, Library, Data Management, Setup, and Help. The main header is 'Report Writer'. Below it, there are tabs for 'Reports Classic', 'Report Writer', and 'Report Results'. The 'Report Writer' tab is active, and the sub-header is 'Reports > Create a New Report'. On the left, a 'Process Navigator' lists six steps: 1. Select Report Type, 2. Configure Report Columns, 3. Select Sort Order, 4. Configure Filters (highlighted), 5. Identify Report, and 6. Report Criteria Summary. Below the navigator is a 'Related Actions' section with a link to 'Accessible Filters'. The main content area has a heading 'This is the list of filters configured for this report. Use the links and actions on this page to create more filters or work with the existing ones.' Below this is a 'Create a filter' button. A table lists the configured filters. The first filter is 'Email Campaign', which is 'REQUIRED' and has a green checkmark in the 'Edit at run-time' column. The 'Actions' column for this filter contains a red-circled 'Edit' link. At the bottom of the filter list are 'Cancel', '<< Previous', and 'Next >>' buttons.

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

This screenshot shows the same Convio Report Writer interface, but now the 'Email Campaign' filter is expanded. The 'Filter' column shows 'Email Campaign' with a dropdown arrow. The 'Edit at run-time' column shows a checked checkbox. The 'Actions' column contains a 'more...' link. Below the filter list, there is a 'Save this filter' button and a 'Cancel' link. At the bottom are 'Cancel', '<< Previous', and 'Next >>' buttons.

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](#)

<input type="checkbox"/>	Name	Description	Date Modified
<input type="checkbox"/>	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
<input type="checkbox"/>	AHS Communications	AHS monthly e-newsletter	Oct 12, 2007 8:47:09 AM
<input type="checkbox"/>	Disaster Relief Campaign	This campaign is geared towards raising funds to help with disaster relief efforts.	Apr 14, 2005 9:20:49 AM
<input type="checkbox"/>	Membership e-Renewal	Campaign to drive e-renewals online	Apr 14, 2005 9:19:45 AM
<input checked="" type="checkbox"/>	Monthly e-Newsletters	AHS monthly e-newsletter	Jun 17, 2007 8:23:06 AM
<input type="checkbox"/>	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.

[Home](#) | [Content](#) | [Fundraising](#) | [Advocacy](#) | [Email](#) | [Constituent360](#) | [Library](#) | [Data Management](#) | [Setup](#) | [Help](#)

Report Writer

All Centers

[Reports Classic](#) | **[Report Writer](#)** | [Report Results](#)

Reports > Create a New Report

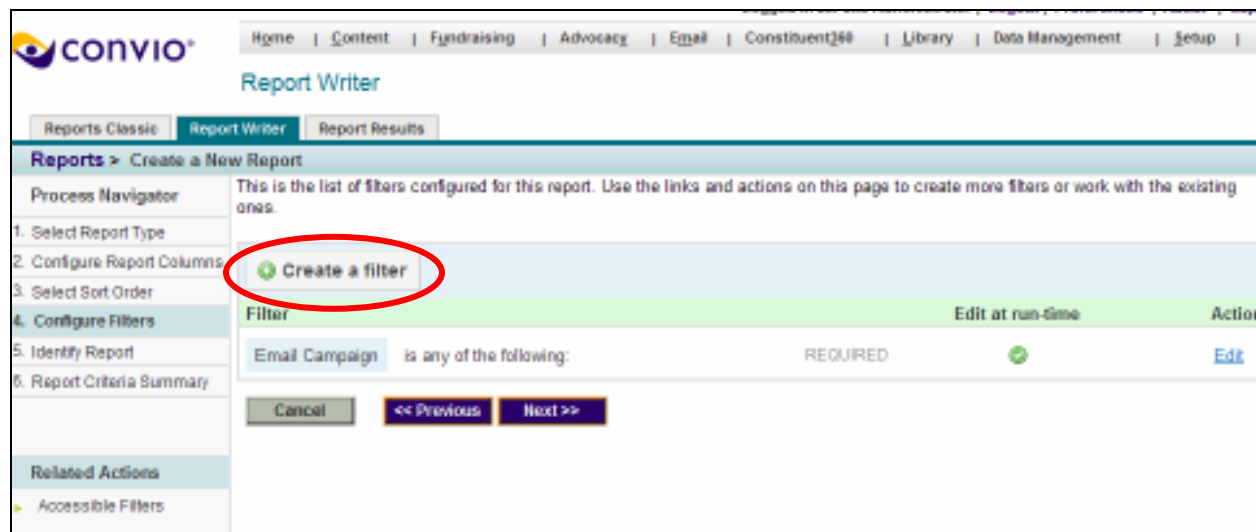
Process Navigator
1. Select Report Type
2. Configure Report Columns
3. Select Sort Order
4. Configure Filters
5. Identify Report
6. Report Criteria Summary

Related Actions
▶ Accessible Filters

This is the list of filters configured for this report. Use the links and actions on this page to create more filters or work with the existing ones.

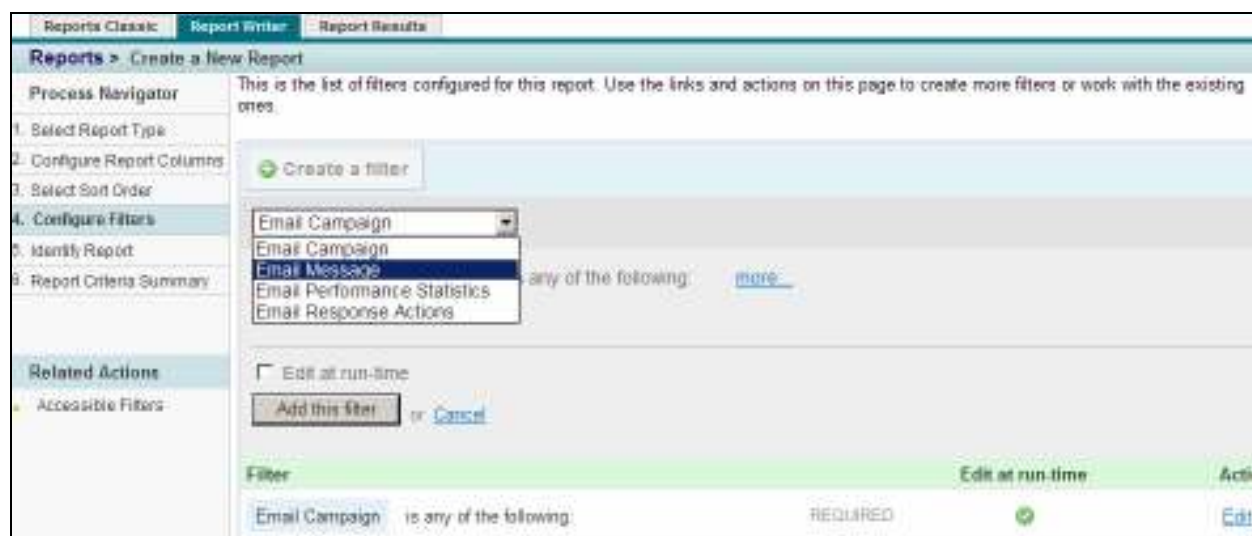
Filter	Edit at run-time	Actions
<div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Email Campaign</div> <div style="border: 1px solid #ccc; padding: 2px;">Email Campaign</div>	is any of the following: more...	<input checked="" type="checkbox"/> Monthly e-Newsletters <input checked="" type="checkbox"/> Edit at run-time <div style="margin-top: 5px;"> <input type="button" value="Save this filter"/> or Cancel </div>

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**.

The screenshot shows the 'Reports > Create a New Report' interface. On the left is a 'Process Navigator' with steps 1 through 6. Step 4, 'Configure Filters', is currently active. The main area shows a list of filters configured for the report. A 'Create a filter' button is at the top. Below it, a filter is being configured: 'Email Message' is selected from a dropdown, and a sub-dropdown is open showing options: 'Message', 'Message Name', 'Message Purpose', 'Message Type', 'Application Name', 'Date Created', and 'Date Modified'. The 'Message' option is highlighted. Below the sub-dropdown, it says 'is any of the following:' with a 'more...' link. At the bottom of the filter configuration area, there are buttons for 'Cancel', '<< Previous', and 'Next >>'. There is also an 'Edit at run-time' link and an 'Action' link.

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](#)

<input type="checkbox"/>	Name	Description	Date Modified
<input type="checkbox"/>	AHS August Updates	Updates about Q2 at AHS	Apr 14, 2005 3:10:24 PM
<input type="checkbox"/>	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
<input type="checkbox"/>	AHS eNewsletter	Monthly e-newsletter	Apr 23, 2008 9:18:50 AM
<input type="checkbox"/>	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
<input type="checkbox"/>	AHS November Updates	Updates about Q4 at AHS	Oct 25, 2006 1:41:12 PM
<input checked="" type="checkbox"/>	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.*

convio® Home | Content | Fundraising | Advocacy | Email | Constituent360 | Library | Data Management | Setup | Help

Report Writer All Centers Switch

Reports Classic Report Writer Report Results

Reports > Create a New Report

Process Navigator

1. Select Report Type
2. Configure Report Columns
3. Select Sort Order
4. Configure Filters
5. Identify Report
6. Report Criteria Summary

Related Actions

- Accessible Filters

This is the list of filters configured for this report. Use the links and actions on this page to create more filters or work with the existing ones.

Create a filter

Email Message

Message is any of the following [more...](#)

☒ AHS September 2007 Newsletter

☒ Edit at run-time

[Add this filter](#) or [Cancel](#)

Filter	Edit at run-time	Actions
Email Campaign is any of the following Monthly e-Newsletters	REQUIRED	<input checked="" type="checkbox"/> Edit

[Cancel](#) [Previous](#) [Next](#)

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

convio® Home | Content | Fundraising | Advocacy | Email | Constituent360 | Library | Data Management | Setup | Help

Report Writer All Centers Switch

Reports Classic Report Writer Report Results

Reports > Create a New Report

Process Navigator

1. Select Report Type
2. Configure Report Columns
3. Select Sort Order
4. Configure Filters
5. Identify Report
6. Report Criteria Summary

Related Actions

- Accessible Filters

This is the list of filters configured for this report. Use the links and actions on this page to create more filters or work with the existing ones.

Create a filter

Email Message

Message is any of the following [more...](#)

☒ AHS September 2007 Newsletter

☒ Edit at run-time

[Add this filter](#) or [Cancel](#)

Filter	Edit at run-time	Actions
Email Campaign is any of the following Monthly e-Newsletters	REQUIRED	<input checked="" type="checkbox"/> Edit

[Cancel](#) [Previous](#) [Next](#)

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.

The screenshot shows the 'Report Writer Manager' interface for the 'CONVIO TEST SITE'. The top navigation bar includes links for Home, Content, Fundraising, Advisory, Email, Constituent299, Library, Data Management, and Setup. Below the navigation bar, there are tabs for 'Reports Classic', 'Report Writer', and 'Report Results'. The main content area is titled 'Reports > All Campaigns' and features a 'Process Navigator' on the left with steps 1 through 6. Step 5, 'Identify Report', is currently selected. The main panel contains four sections:

- 1. Report Label:** A text input field with the value 'All Campaigns'.
- 2. Report Description:** A text input field with the value 'Did not make any changes to the columns'.
- 3. Security Category:** A dropdown menu with 'General' selected.
- 4. Report Folder:** A dropdown menu with 'Custom Reports' selected.

 At the bottom of the main panel are three buttons: 'Cancel', '<< Previous', and 'Next >>'.

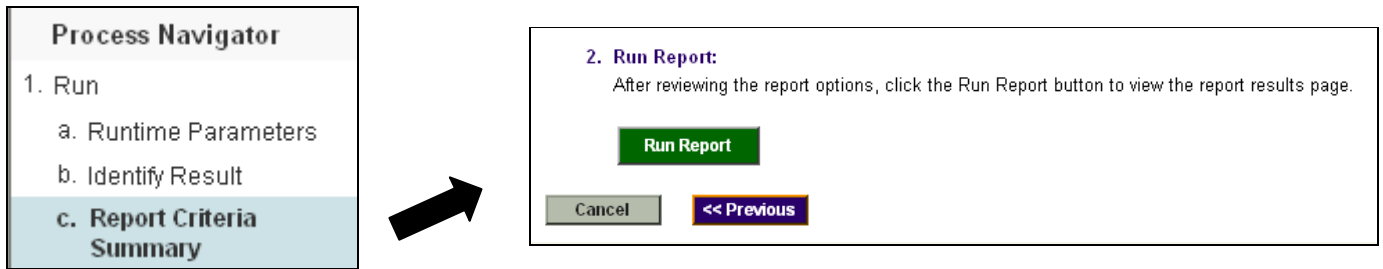
In Step 6, you'll be able to view a summary of the selections you made in the previous steps. After you've reviewed your selections you can either run the report or save the report to run at a future date.

The screenshot shows the 'Report Configuration Summary' screen in the 'CONVIO TEST SITE' 'Report Writer Manager'. The left sidebar shows the 'Process Navigator' with steps 1 through 6. Step 6, 'Report Configuration Summary', is selected. The main panel displays a summary of the configurations made in the previous steps:

- Report Label:** All Campaigns
- Report Description:** Did not make any changes to the columns
- Security Category:** General
- Report Folder:** Custom Reports


 Below these, there is a section for 'Report Details' with a table showing the report's name, description, and other metadata. At the bottom, there are two buttons: 'Run Report' and 'Save Report'.

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**.



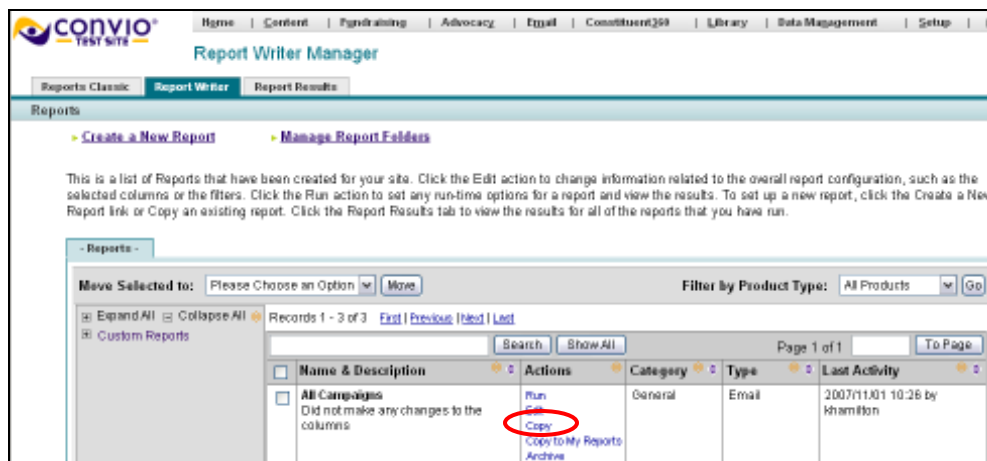
Exercise: Create a Report from a Model

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 .

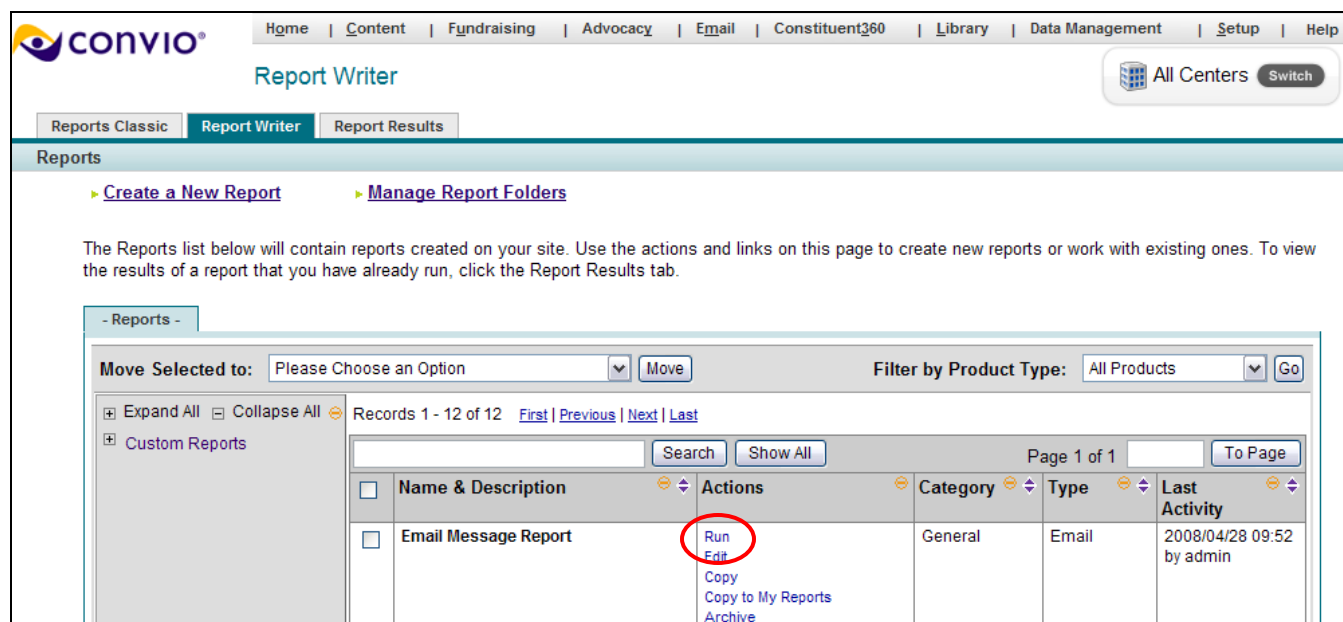
Create a Report from a Copy

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.

Report Writer Manager

Reports Classic | Report Writer | **Report Results**

Report Results > Email Messages Report - 10-30-07

[Edit Report Configuration](#) [Save Report](#)

These are the results for your report. Once your results are available, you can click the download icon to save your report results in any of the following formats: HTML, PDF, or CSV file. To send the report results to your local printer, click the print icon.

If you would like to change the options used for this report, such as the columns or filters selected, click the Edit Report Configuration link to make the necessary updates. You can then re-run the report with the new options. Click the Save Report link if you would like to re-use this report or make it available to others in your organization.

Download results as CSV, HTML, or PDF

Email Messages Report - 10-30-07

Email Campaign Name	Email Campaign Type	Message Name	Targeted Number of Email Delivery Count	Send Ended Date	Send Started Date	Number of Emails Sent	Number of Emails Delivered	Number of Opens	Number of Clickthroughs	Number of Actions Taken	Total Open Count	Total Click Count
04-20-2007 Colorado Email		Colorado Parolee Voting	1	4/20/07 9:15 PM	4/20/07 9:50 PM	4888	4846	0	71	0	0	71

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.

Report Writer Manager

Reports Classic | Report Writer | **Report Results**

Report Results

[Refresh this page](#)

This is a list of Results for reports that you have run in the last 1440 hours. Click the View action to see the results for a specific report. Click the Print action to print the results on your local printer.

Report run in Report Writer

Report run in Reports Classic

Name & Description	Actions	Status	Run Date
Donations By Transaction Nov 2, 2007 3:08:10 PM	View Download Print Delete	Completed	2007/11/02 15:08
Donations By Transaction			
All Email Campaigns	View Download Print Delete	Completed 2 Rows	2007/11/02 15:07

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 formats³: 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.

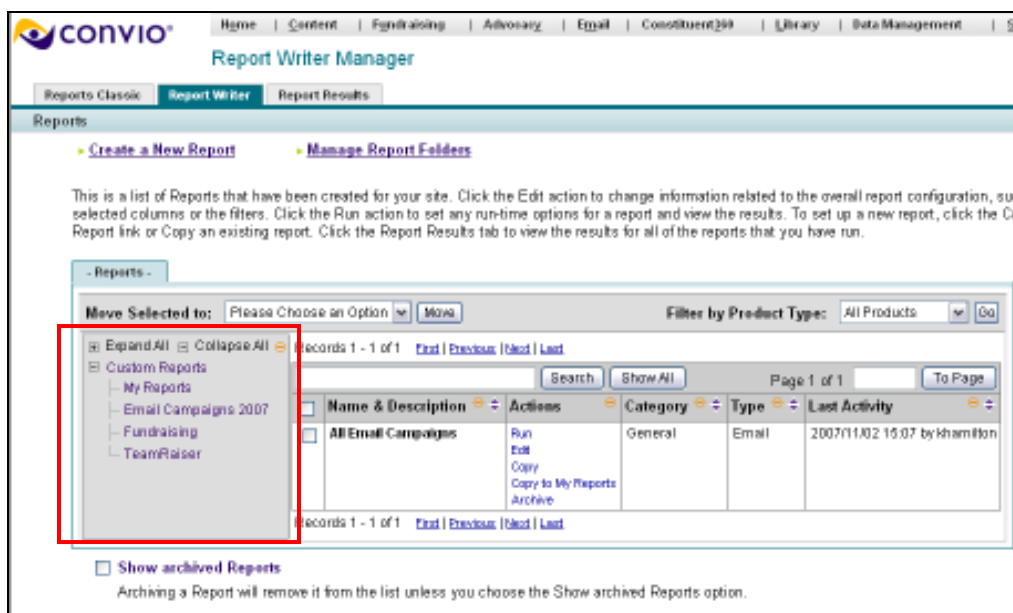
1. From the AHS administrator home page, click **Data Management > Reports**. Click the **Report Results** tab.
2. Search the list and locate the report you ran from the previous exercise.
3. Once you've located your report, click **Download** under the **Actions** column.
4. From this page, click **Download**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

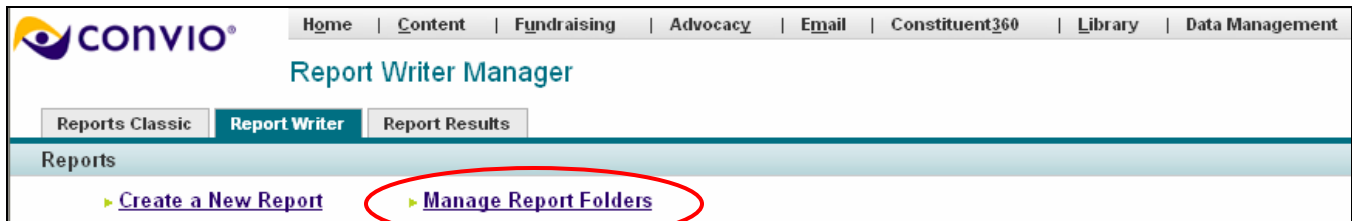
- **When you run a report that is in a folder, the results will also be placed in that folder, so you are simultaneously organizing your report configurations and your report results.**



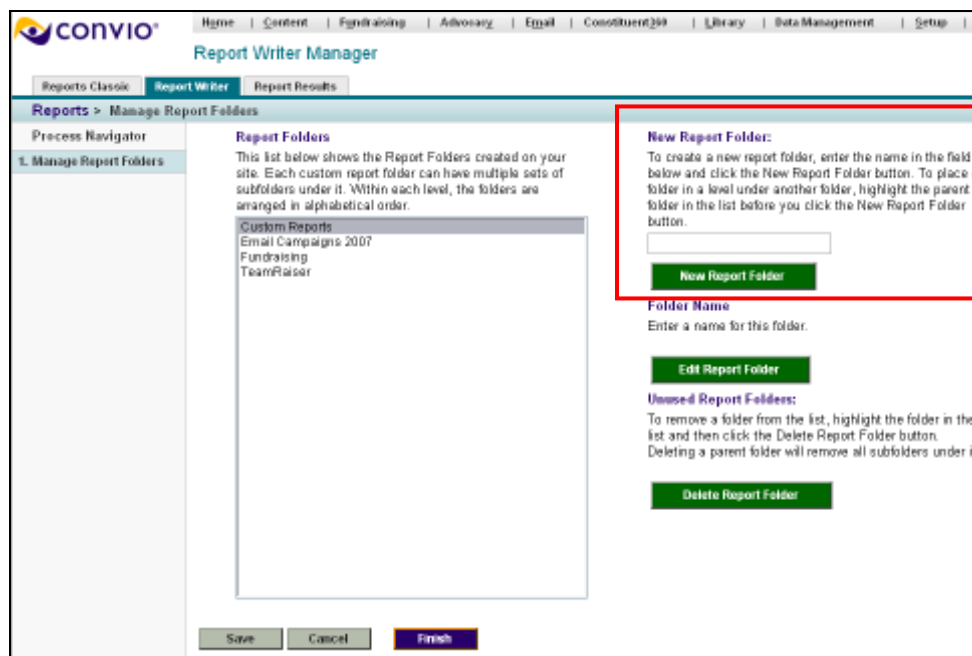
³ For reports run using Reports Classic, only CSV format is available.

Creating a Report Folder

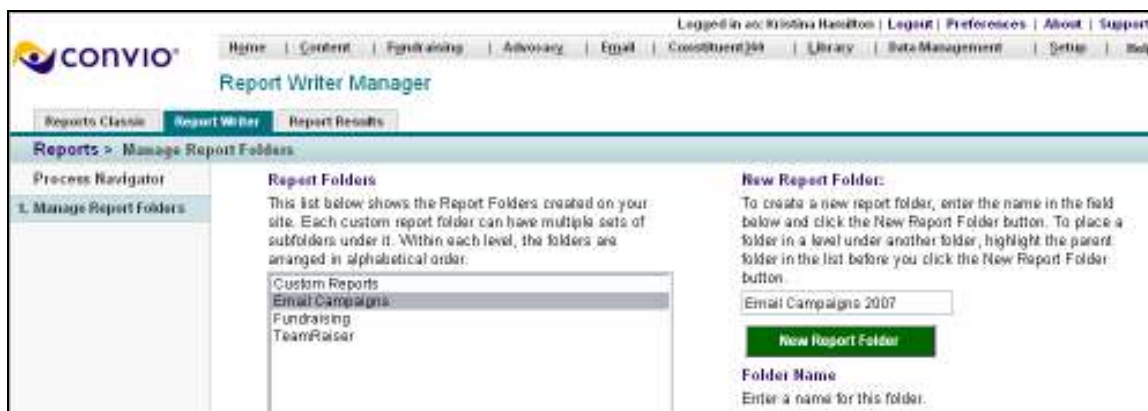
To create a new report folder, click *Manage Report Folders* at the top of the Reports List page.



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.



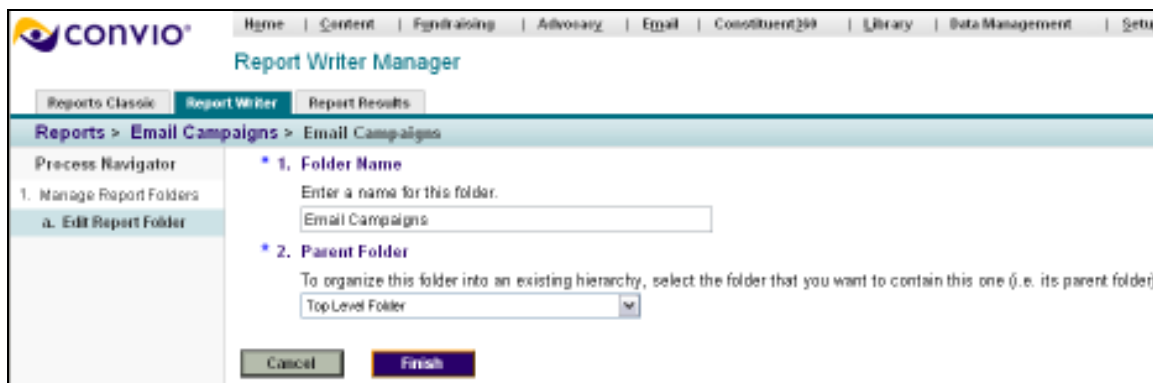
Once you create a new sub-folder it will appear underneath the top level folder.



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.

The screenshot shows the Convio Report Writer Manager interface. At the top, there's a navigation bar with links: Home, Content, Fundraising, Advocacy, Email, Constituent360, Library, Data Management, and Settings. Below this is the 'Report Writer Manager' header with tabs for Reports Classic, Report Writer, and Report Results. The 'Report Writer' tab is active. Under the 'Reports' section, there are links for 'Create a New Report' and 'Manage Report Folders'. A text block explains that this is a list of reports created for the site, with instructions on how to edit, run, or copy reports. A callout box with an arrow points to the 'Move' button in the 'Move Selected to:' dropdown menu, with the text 'Assign Reports to Folders'. Below this, there's a table with columns: Name & Description, Actions, Category, Type, and Last Activity. The table shows one report: 'All Email Campaigns' with a 'Run' action selected. The left sidebar shows a folder tree with 'Custom Reports' expanded, showing 'My Reports', 'Email Campaigns', 'Fundraising', and 'TeamRaiser'.

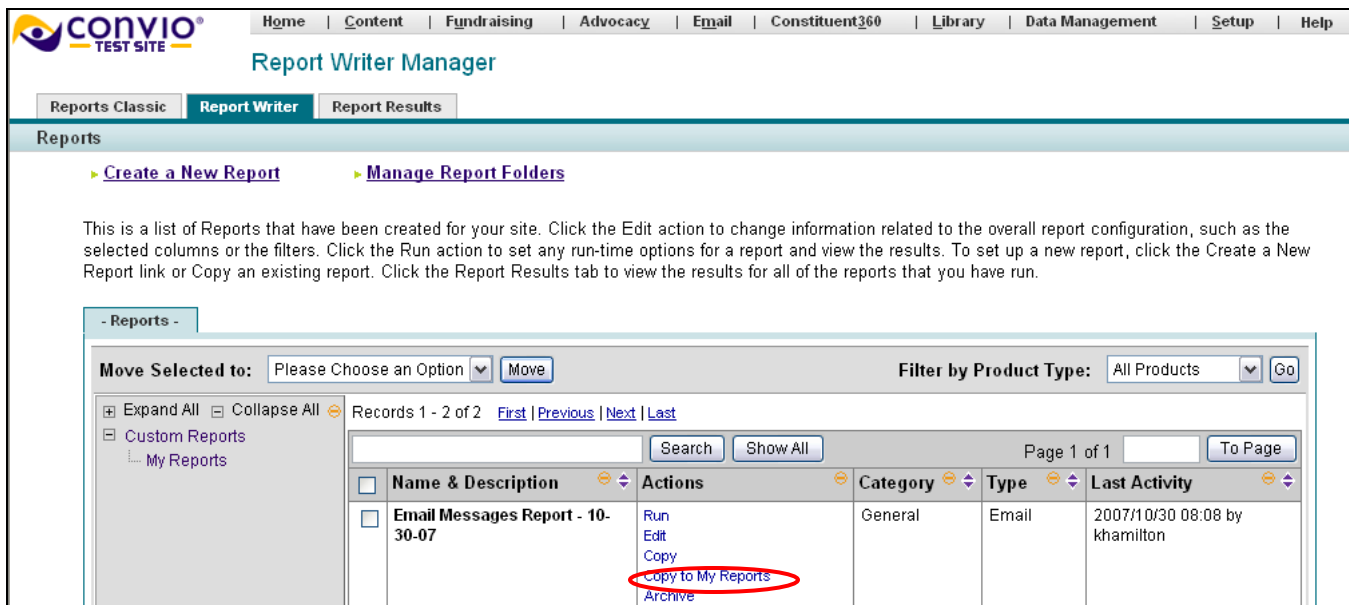
To display reports in a specific folder, highlight the folder name in the list of folders on the left. If your folder is not displaying, click “+” to expand the folder tree and search for your folder.

This screenshot shows the same Convio Report Writer Manager interface, but with the 'Email Campaigns' folder selected in the left sidebar. The 'Move Selected to:' dropdown menu is still set to 'Please Choose an Option'. The table below shows the same report: 'All Email Campaigns'. The left sidebar shows the folder tree with 'Email Campaigns' highlighted. The 'Custom Reports' folder is expanded, showing 'My Reports', 'Email Campaigns', 'Fundraising', and 'TeamRaiser'.

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:

Group List Group Information Members **Group Permissions**

Site Administrators

You are editing permissions for the Group: Site Administrators
[View all permissions for Site Administrators](#)

Choose Permission Type

What type of permissions do you want to edit? Email Management Choose

Email Management

These permissions control which administrators are allowed to compose or send email messages. This permission applies across all contact records in the site's database.

Default Permission

The default permission on **Email Management** for this group will be applied to all categories not being overridden below, as well as all new categories that are created in the future.

Changing this default permission will immediately affect all currently existing categories not explicitly overridden below.

Permissions displayed below are listed in order of increasing privilege, bottom to top. Any individual permission listed is a superset of the permission listed immediately below it.

Default Permission:

- ☐ **Updated Address, Compose and Send Email**
 Allow administrators in this group to update email addresses in an address book, compose email messages, modify email messages written by others and send email messages.
- ☐ **Compose and Send Email**
 Allow administrators in this group to compose email messages, modify email messages written by others and send email messages.
- ☐ **Send but not Edit Email**
 Allow administrators in this group to send email messages but not to compose or modify them.
- ☐ **Compose and Edit Email**
 Allow administrators in this group to compose email messages but not to send them.
- ☒ **View and View Email Reports**
 Allow administrators in this group to view and view email reports, but not compose, modify or send email messages.
- ☐ **No additional permissions (inherent from Any registered user)**

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

Group List Group Information Members **Group Permissions**

Site Administrators

You are editing permissions for the Group: Site Administrators
[View all permissions for Site Administrators](#)

Choose Permission Type

What type of permissions do you want to edit? Report Writer Choose

Report Writer

These permissions control which administrators are allowed to create, edit, and view reports in the report writer.

Default Permission

The default permission on **Report Writer** for this group will be applied to all categories not being overridden below, as well as all new categories that are created in the future.

Changing this default permission will immediately affect all currently existing categories not explicitly overridden below.

Permissions displayed below are listed in order of increasing privilege, bottom to top. Any individual permission listed is a superset of the permission listed immediately below it.

Default Permission:

- ☒ **Design Report Definitions**
 Allow administrators in this group to create, edit, and execute Report Definitions, and view Reports Results.
- ☒ **Edit Criteria For Report Definitions**
 Allow administrators in this group to edit criteria and execute Report Definitions, and view Reports Results.
- ☒ **Run Report Definition**
 Allow administrators in this group to execute Report Definitions, and view Reports Results.
- ☐ **No additional permissions (inherent from Any registered user)**

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

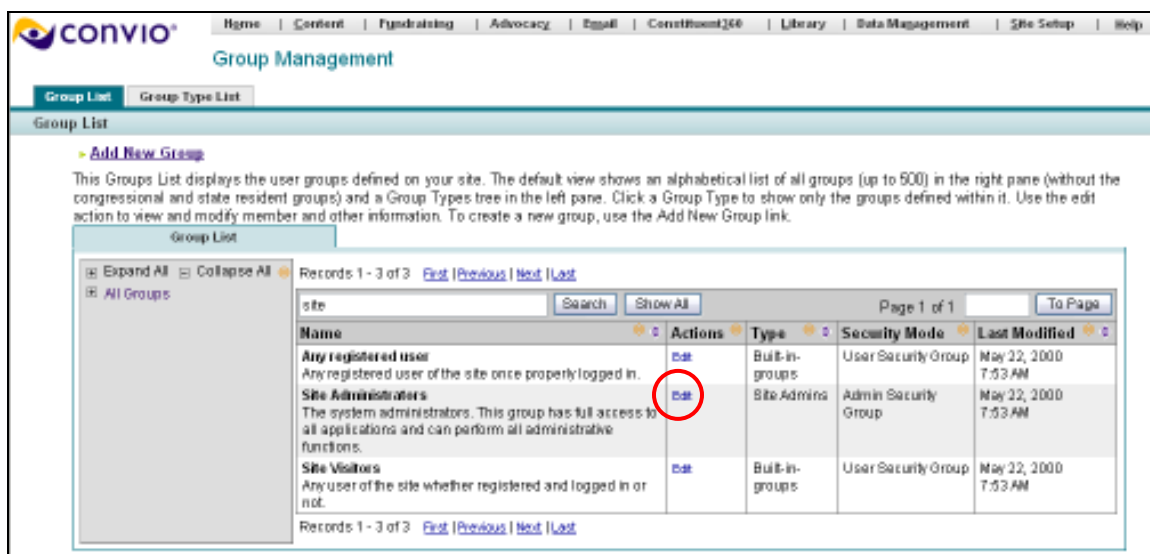
- **Design Report Definitions** -- this role includes the ability to design new reports from a model or from a copy. Those with the Designer role can fully edit their own reports and run all reports that appear in the Security Categories to which they have access.
- **Edit Criteria for Report Definitions** -- 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:

Default Permission:	<p><input checked="" type="radio"/> Design Report Definitions Allow administrators in this group to create, edit, and execute Report Definitions, and view Reports Results.</p> <p><input type="radio"/> Edit Criteria For Report Definitions Allow administrators in this group to edit criteria and execute Report Definitions, and view Reports Results.</p> <p><input type="radio"/> Run Report Definition Allow administrators in this group to execute Report Definitions, and view Reports Results.</p> <p><input type="radio"/> No additional permissions(inherit from Any registered user)</p>
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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.

CONVIO TEST SITE

Home | Content | Fundraising | Advocacy | Email | Constituent360 | Library | Data Management | Setup

Report Writer Manager

Reports Classic | Report Writer | Report Results

Reports > All Campaigns

Process Navigator

1. Select Report Type
2. Configure Report Columns
3. Select Sort Order
4. Configure Filters
- 5. Identify Report**
6. Report Criteria Summary

*** 1. Report Label:**
Enter a label that can be used to identify this report.
All Campaigns

2. Report Description:
Enter a description that can also be used to identify this report.
Did not make any changes to the columns


*** 3. Security Category:**
Select a Security Category to control who in your organization has permission to copy or run this report.
General

4. Report Folder:
Select the folder where the report will be stored. When this report is run, the results will automatically be placed in the same folder as the report.
Custom Reports

Cancel << Previous Next >>

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.