

The Basics of Creating Reports

This document gives a general description of the process for creating reports. It describes the features that are common to most reports. The idea is that by reading this you'll have enough information on how reports work to create any report in PowerBase. Of course the details of what you can display, sort by, filter by will depend on the report in question

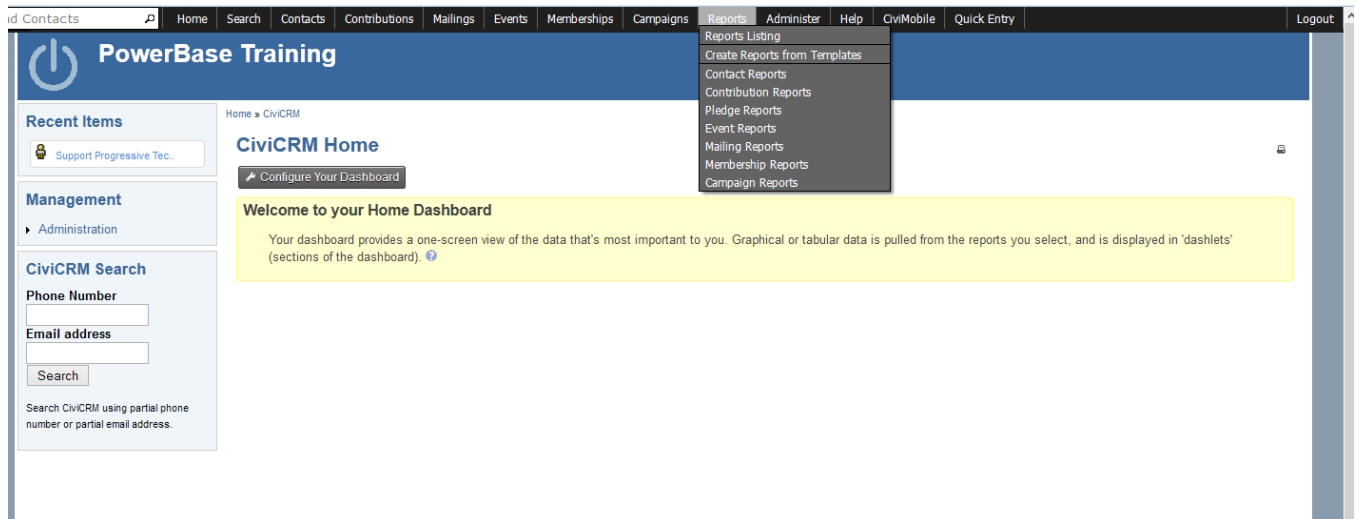
Reports are created from Report Templates and then they are saved as a Report that can be retrieved from the Reports list (or elsewhere - more details on that to follow) and run. Alternatively, you can create a new report by selecting an existing report, modifying its criteria and save it as a new report.

Once a Report is created, it will automatically be available for others to run from the appropriate category on the Reports menu. As you create it, you can make it available for the Home page Dashboard, allowing anyone with the appropriate permissions to customize their dashboard by dragging it from the gallery of "dashlets". You can also put it directly on a PowerBase Menu when it's created. For example, a contribution report might be more visible on the Contributions Menu than it would be in the Reports>Contributions Reports menu.

Reports Menu

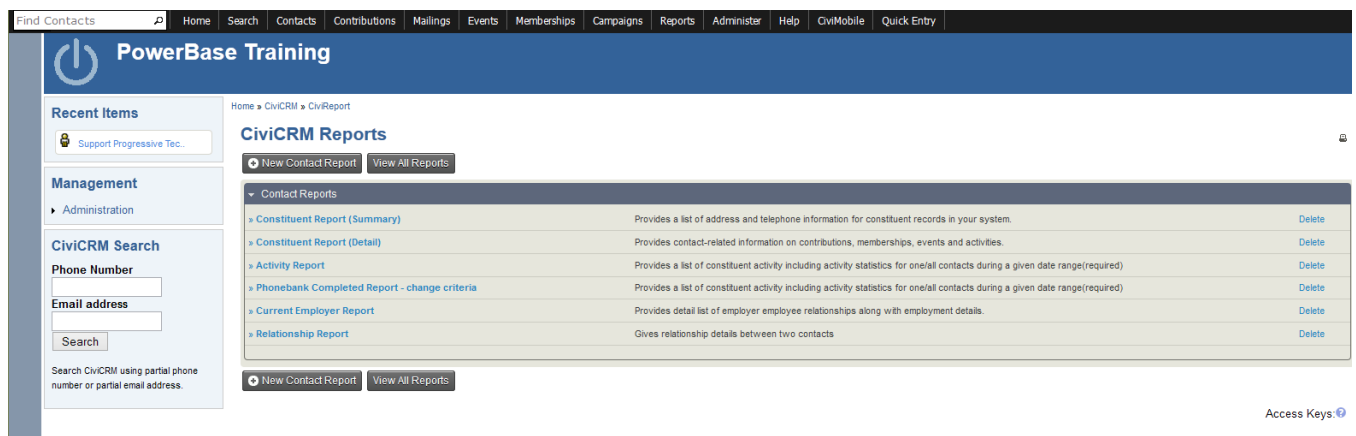
Report creating and using are accessed from the Reports Menu. On the menu, you have the choices of seeing all the Reports that have been created (Reports Listing) and then picking one to run or you can create a new Report (Create Reports from Templates). If you prefer, you can zero in on a category of Reports and do the same operations of using an existing Report or creating a new one from a template.

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Reports are segmented by the data that they pull together. In almost all reports, you have access to some Contact information. Others will have Contribution, Membership, Event Participation, Pledge, or Mailings details.

Once you select a category, you'll get to a screen like the one below. It lists all the Reports that have already been created in that category. You can run them by clicking on the name. You can delete the report by selecting the delete option. To create a new Report, click on the button "New Contact Report". Each category will have a different type of New Report. In the screenshot, we are in the Contact reports, so the New button goes to Contact Report templates.

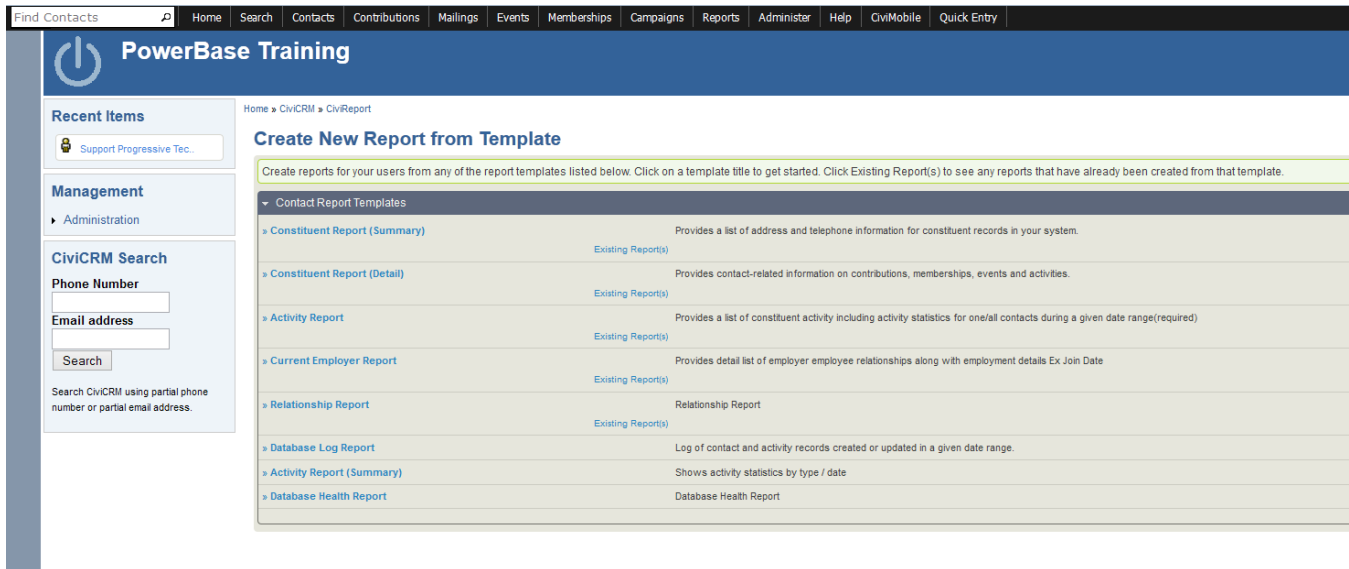


Working from a Report Template

Selecting the New Contact Report button brings you to this screen. From here, clicking on the name starts a **new** Report with default options. Clicking

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on “Existing Reports” will pull up a list of all the reports created from the template.



There are two major sections in each Report:

1. **Report Criteria** and
2. **Create Report**

Initially, however, all you see is **Report Criteria** and its multiple sections, each with multiple options. Report Criteria always has these two sections in it:

1. **Display Columns** which controls which fields appear on the Report
2. **Set Filters** which limits the data that will be selected to include in the Report.

In addition, there are some others that often appear in Report Criteria:

1. **Order by Columns** which controls what the sequence of the Report is.
2. **Group by Columns** which allows you to summarize data, such as contributions by person.

Setting up Report Criteria

We will create a Constituent Report (Summary) as an example of creating a report from a template. If you click on Constituent Report (Summary), you'll come to the next screen.

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Home » CiviCRM » Report Templates

Constituent Report (Summary) - Template

Report Criteria

Display Columns

<input checked="" type="checkbox"/> Contact Name	<input type="checkbox"/> First Name	<input type="checkbox"/> Last Name	<input type="checkbox"/> Contact ID
<input type="checkbox"/> Email	<input checked="" type="checkbox"/> Street Address	<input checked="" type="checkbox"/> City	<input type="checkbox"/> Postal Code
<input type="checkbox"/> State/Province	<input checked="" type="checkbox"/> Country	<input type="checkbox"/> Phone	

- ▶ Communication Details
- ▶ Constituent Info - Individuals
- ▶ Grassroots Info
- ▶ Demographics
- ▶ Constituent Info - Organizations
- ▶ Media Outlet Info
- ▶ Media Info
- ▶ Funder Info
- ▶ Summary Fields
- ▶ Elected Official Info
- ▶ Grant Info
- ▶ Donor Tracking

Display Columns

In this section you select or unselect the fields for the Report. Each of the dark grey rows with a triangle at the left are sets of fields that can be added to the report. Click on the triangle exposes the fields. Select from them as desired.

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Setting Up Order By Columns

If this section is there, you can modify the sequencing of the report. Select your preferred sequence. The **Section Header / Group By** options will group your results by the criteria in the **Column** field.

The screenshot shows a web-based report configuration interface. At the top, there is a section titled "Order by Columns" with a table-like structure. The first row has three columns: "Column" with a dropdown menu showing "Last Name, First Name", "Order" with a dropdown menu showing "Ascending", and "Section Header / Group By" with a checkbox. Below this is a link "▶ another column".

Below the "Order by Columns" section is a section titled "Set Filters". It contains five rows, each representing a filter criterion:

- Contact Name:** "Contains" dropdown, followed by an empty text input field.
- Contact Source:** "Contains" dropdown, followed by an empty text input field.
- Country:** "Is one of" dropdown, followed by a list box containing "United States".
- State / Province:** "Is one of" dropdown, followed by a list box containing "North Carolina", "North Dakota", "Northern Mariana Islands", and "Ohio" (which is highlighted in blue).
- Group:** "Is one of" dropdown, followed by a list box containing "_Donor Status update", "_Immigrant rights interest in 44505", "_JG geo-diverse", and "_JG people".

Set Filters

This is a very important section. It controls which data will appear in your report. If nothing is selected, then all data will be included. PowerBase usually defaults to preloading your State as a criteria. Unless you are absolutely sure all records have a complete address, you should deselect it by holding down the Ctrl or Apple key and pressing Enter. If you don't do this, people without a complete address will be filtered out of the group.

There can be many types of data included on the filters section, so it's important to think through how the different criteria interact with each other. If you find that you are not getting records that you know should be included in the report, remove criteria and preview the report again.

Preview Report

Once you've configured the Report, you are ready to **Preview the Report**, which simply means, "Run the Report and show me the results on the screen".

Along with viewing the report on the screen, the Preview mode gives you these options:

- create a version that's suitable for printing (**Print Preview**),

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- create a PDF version (**Preview PDF**),
- create a file for downloading (**Preview CSV**),
- add the contacts listed to a group for further work (**Add these Contacts to Group**). The group must be created before adding them to it.

Constituent Report (Summary) - Template

Report Criteria

Create Report

Print Preview Preview PDF Preview CSV » Existing report(s) from this template - select group - Add these Contacts to Group

State / Province Is Ohio

Next > Last >> Records 1 - 50 of 2612 Page 1 of 53 Go

Contact Name	Street Address	City	Country
Aaron, Lillie	584 Granada Ave Apt 107	Youngstown	United States
Abron, Clara	797 Dean St	Youngstown	United States

If the report isn't to your liking, it's a simple matter to change it. Click on the **Report Criteria** row to reopen the settings and change them as needed. You can rerun this as many times as you need until you have it the way you want it. If all you're interested in doing is finding results one time only, then you are done. If you want to save the report(s) to run it again later, you'll need to go into the **Create Report** section.

Create Report

Create Report

General Settings

Report Title

Report Description Provides a list of address and telephone informatic

Report Header

```
<html>
<head>
<title>CiviCRM Report</title>
<meta http-equiv='Content-Type' content='text/html; charset=utf-8' />
<style type="text/css">@import url(https://demo.ourpowerbase.net/sites/all/modules
```

Report Footer

```
<p></p></div></body>
</html>
```

Email Delivery Settings

Subject

To

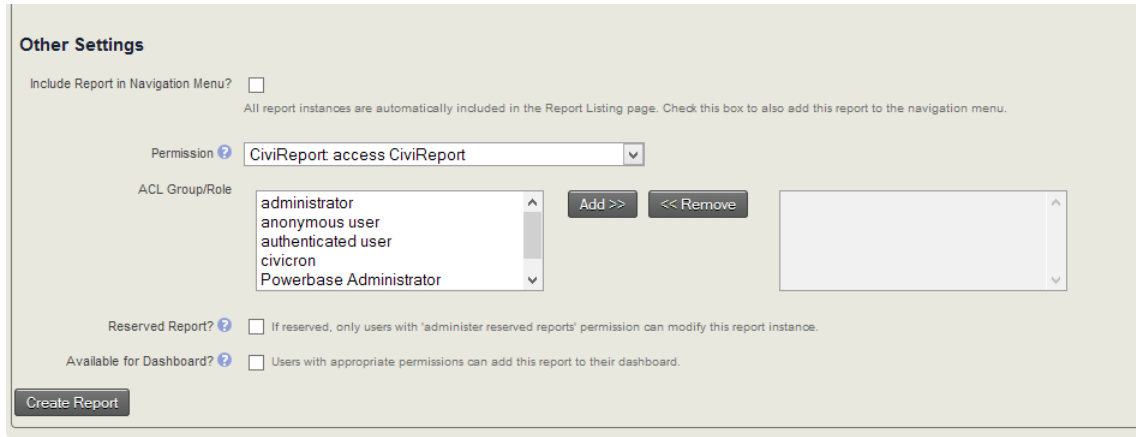
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General Settings

Selecting the **Create Report** option exposes more options for you to configure. To save a Report for re-use, you'll need to fill in the **Report Title**. You can edit the **Report Description** to inform others of what you intended the report for. If it's destined for a printer someday, you should edit the **Report Header** and replace the "CiviCRM Report" phrase with the Report Title.

Other Settings



The screenshot shows the 'Other Settings' form for creating a report. It includes the following elements:

- Include Report in Navigation Menu?** A checkbox that is currently unchecked. Below it is a note: "All report instances are automatically included in the Report Listing page. Check this box to also add this report to the navigation menu."
- Permission** A dropdown menu currently set to "CiviReport access CiviReport".
- ACL Group/Role** A list of roles: administrator, anonymous user, authenticated user, civicron, and Powerbase Administrator. There are "Add >>" and "<< Remove" buttons between the list and an empty destination box.
- Reserved Report?** A checkbox that is unchecked. Below it is a note: "If reserved, only users with 'administer reserved reports' permission can modify this report instance."
- Available for Dashboard?** A checkbox that is unchecked. Below it is a note: "Users with appropriate permissions can add this report to their dashboard."
- A **Create Report** button at the bottom left.

Include Report in Navigation Menu? Check this option if you want to add it to a different menu than the Reports menu where it will automatically appear. You'll get a list of all the Navigation menu items. Pick the heading that corresponds to the menu that you want it to appear on.

Permission You can set up a report so that it is only available for some users.

Reserved Report? Keeps folks without the authority from changing your report into something else.

Available for Dashboard? Check this option so that people can add it to their Home page Dashboard. Doing so will show it among the available dashlets that people can drag to their Home page Dashboard.