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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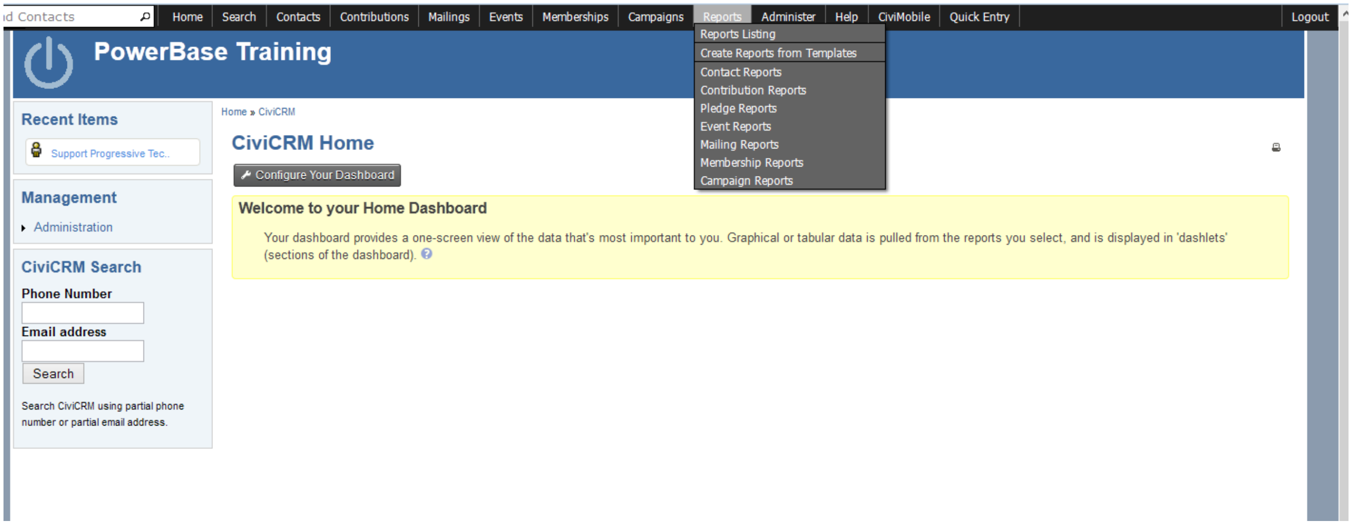
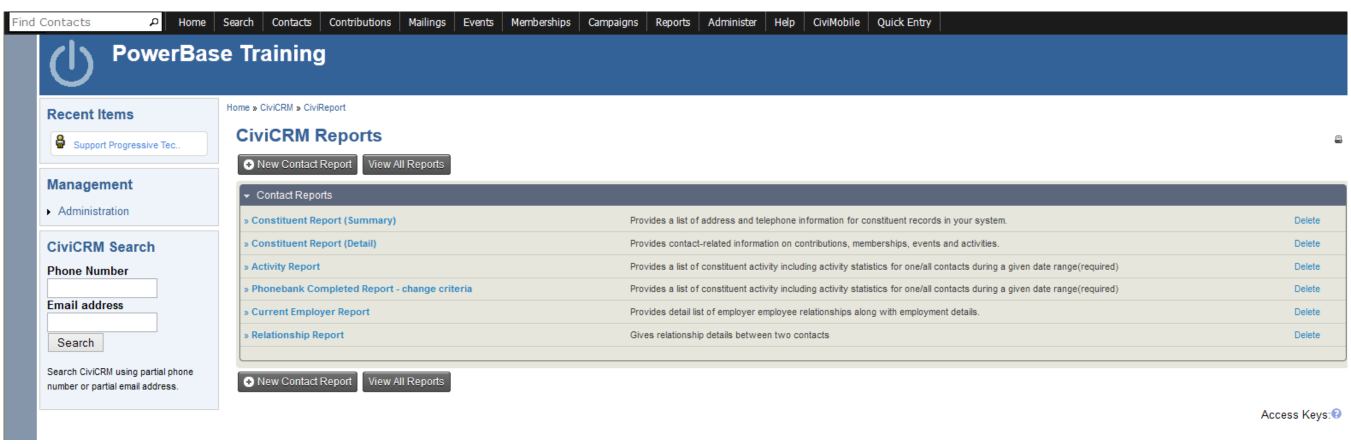


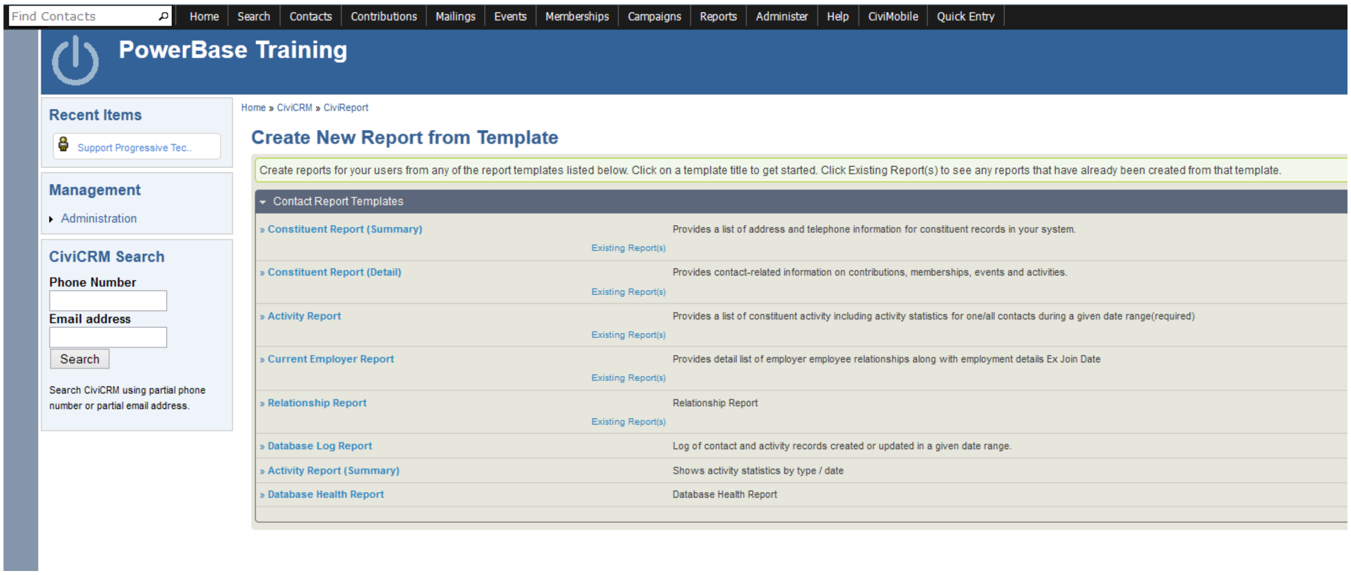
Reports are segmented by the data that they pull together. In almost all reports, you have access to some Contact information. Others will have Contribution, Membership, Event Participation, Pledge, or Mailings details.

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 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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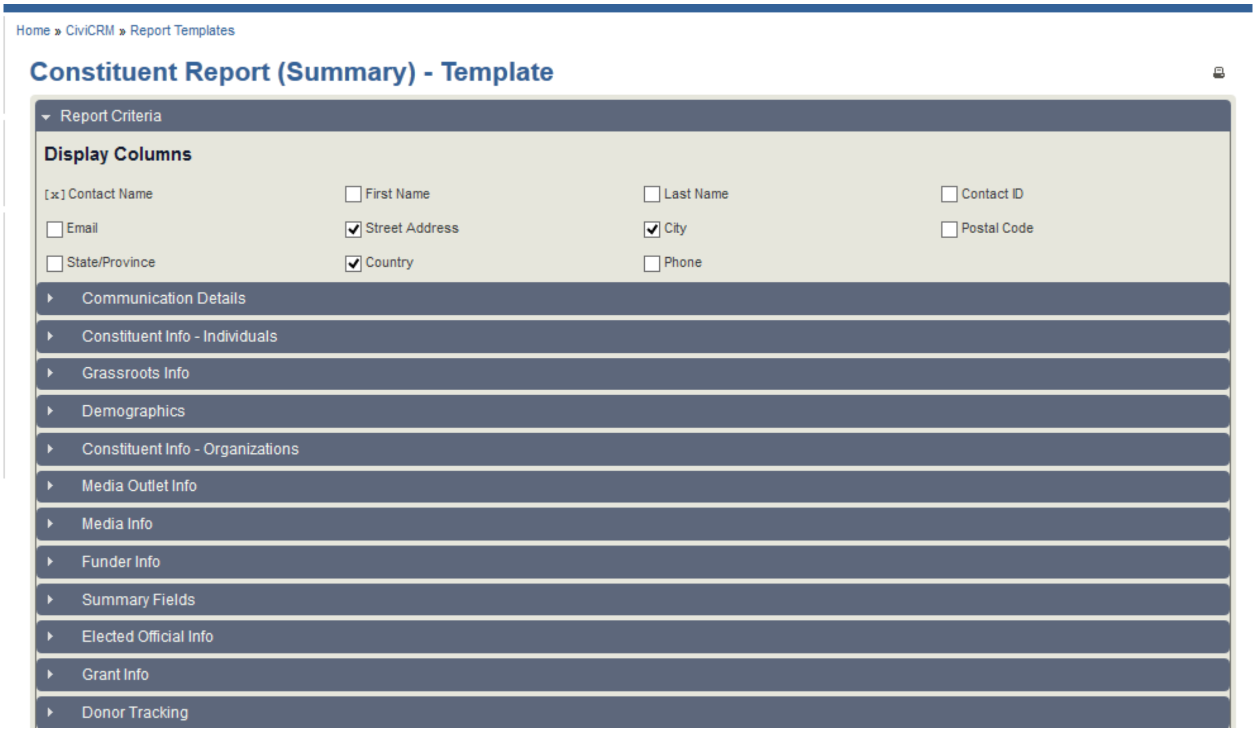
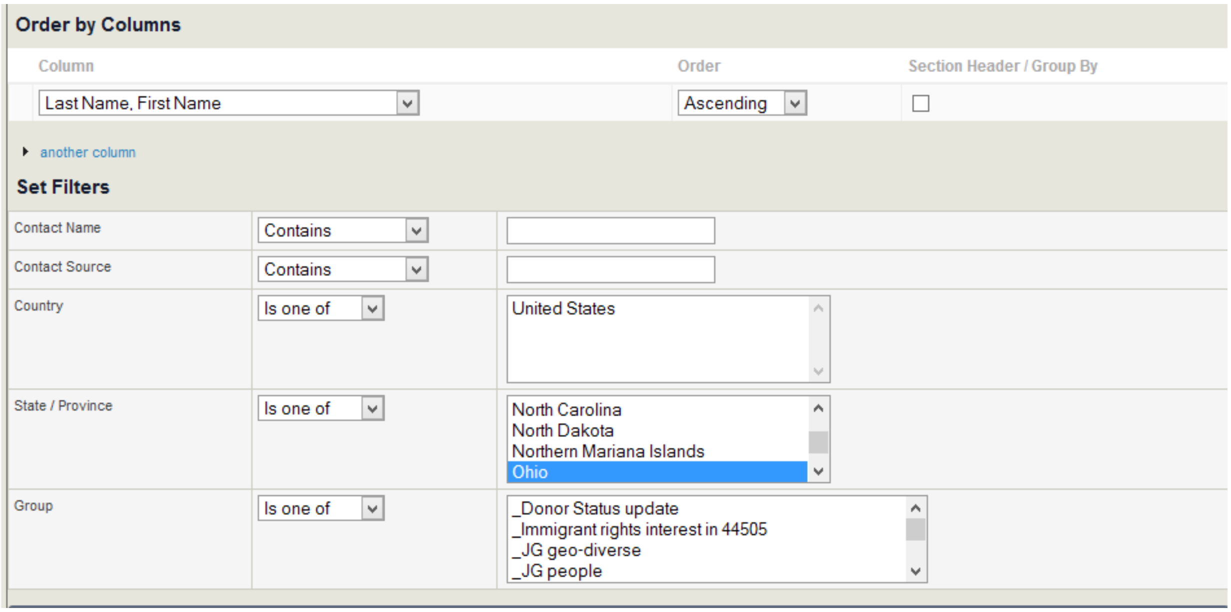


Display Columns

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.

Setting Up Order By Columns

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



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.

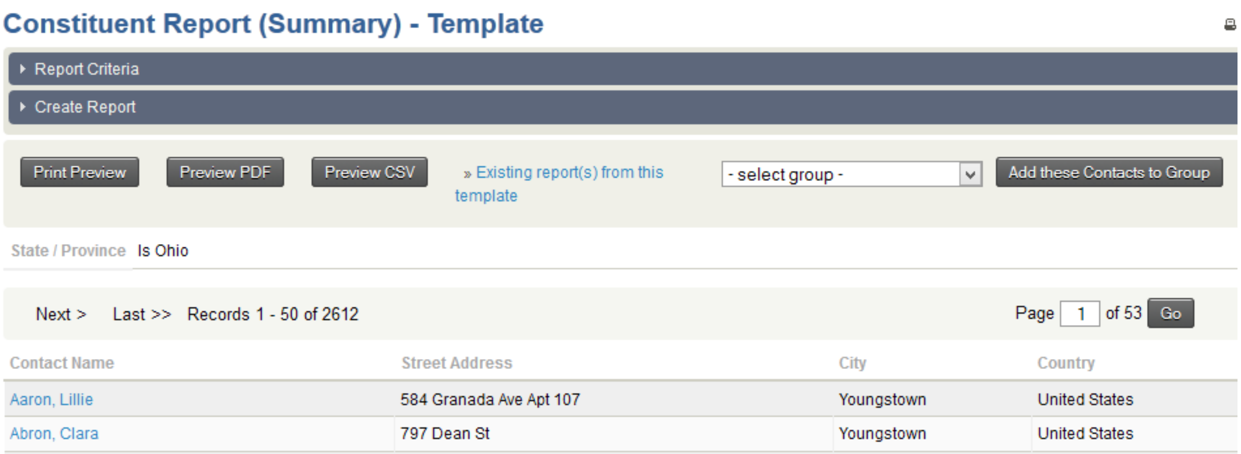
Preview Report

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:

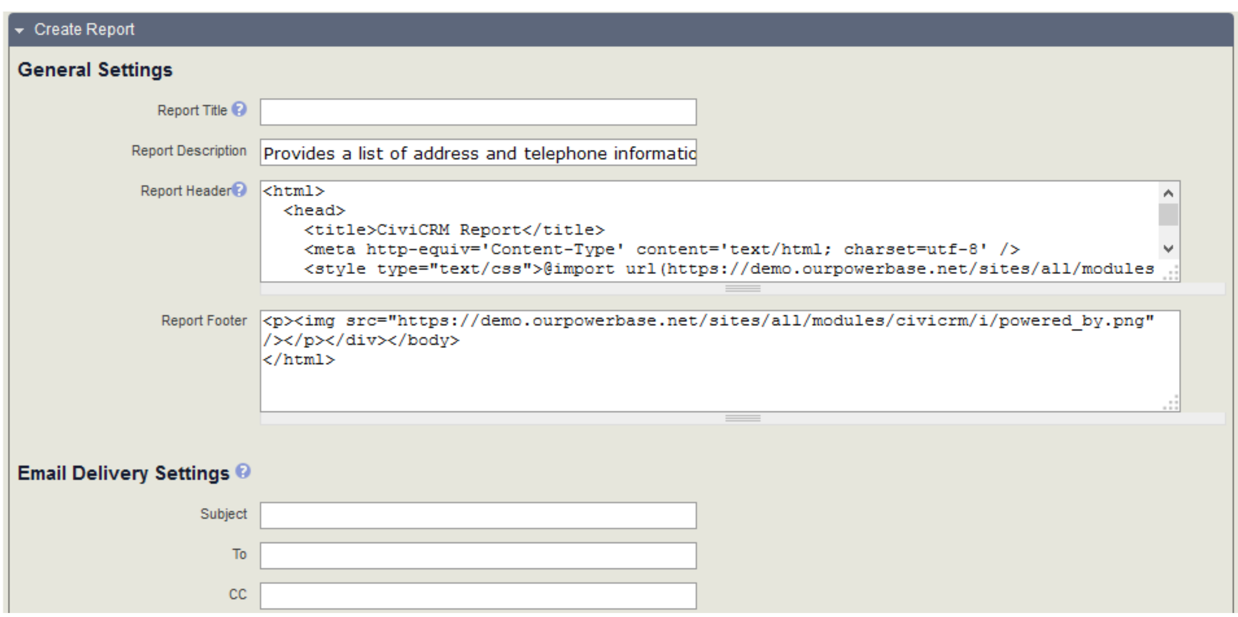
- create a version that's suitable for printing (**Print Preview)**,

- 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.



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 to run it again later, you'll need to go into the **Create Report** section.

Create Report



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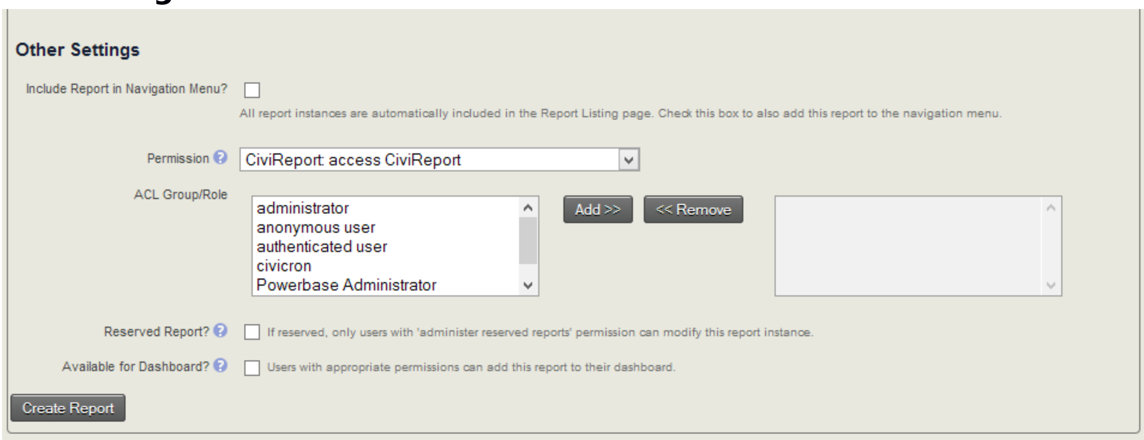
General Settings

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 R**eport 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



Include Report in Navigation Menu? Check this option if you want to add it to a different menu then 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.