Section 7

Custom Reports

7.1 Introduction

The Custom Reporting Tool utilities allow the advanced user to sort, group and output the information contained in TheGreatMultitude in a format specifically designed by the user.

7.2 Objective

The objective of this section is acquaint the user with the Custom Reporting Tool utilities available with TheGreatMultitude and show how the different modules interact with the Custom Reporting Tool utilities to produce outputs that meet the user's specific and general reporting needs.

7.3 Accessing Custom Reporting Tool Utilities

The Custom Reporting Tool utilities are accessed from the Main Partner Screen by clicking on Reports Reports (Alt+R) on the main menu bar. The module currently active will determine the screen displayed.

7.4 Custom Reporting Tool (Partner Reports)

Clicking on the Partner Reports Module icon  on the Vertical Toolbar accesses the Partner Reports Module. Once the Partner Reports Module is activated, The Custom Reporting Tool can be selected form the available reports list.

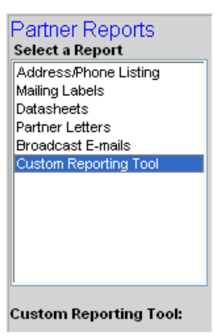


Figure 7-1 Selection – Custom Reporting Tool

Selecting Custom Reporting Tool will open the Custom Reporting Tool page.

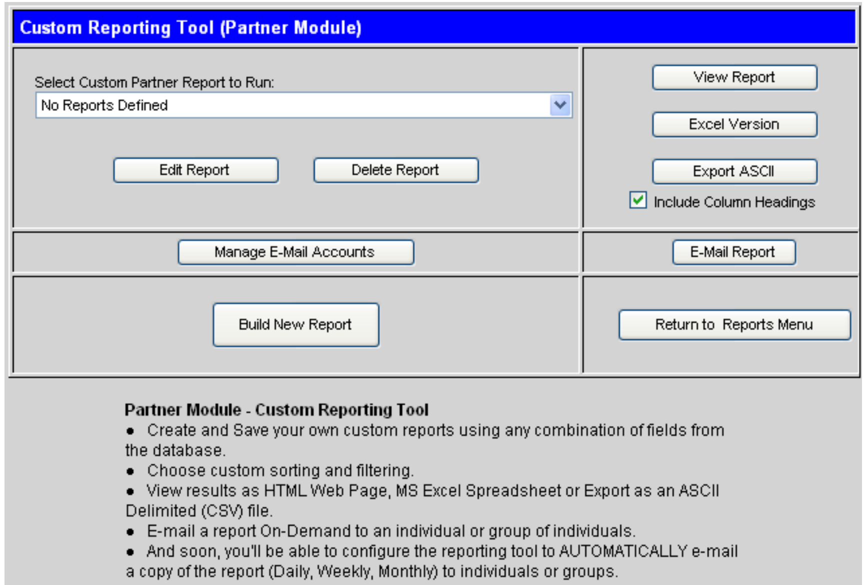


Figure 7-2 Custom Reporting Tool (Partner Module)

7.5 Building A New Report

To build a custom report, the user must first click on the Build New Report button 

. This will open the Partner Module Report Builder.

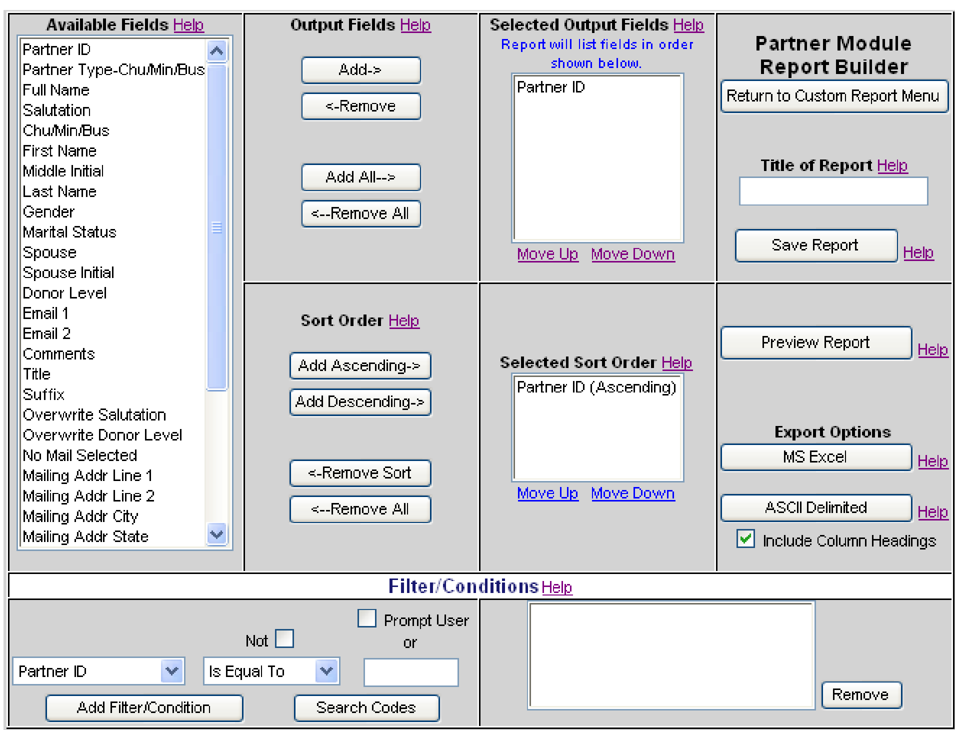


Figure 7-3 Partner Module Report Builder

Available Fields: This table shows all of the data fields in TheGreatMultitude that are available for output , sorting or as a filter/condition.

To add a data field to the output, the user must highlight the desired field by clicking on it in the available fields table (CTRL+Click to select multiple fields) and then, click on the Add button Add-> or Add All button Add All--> if all fields are desired. Fields selected for output can be removed by highlighting the desired fields and then clicking on the Remove <-Remove or the Remove All button <--Remove All. Note that the Partner ID field is required for all outputs and cannot be removed.

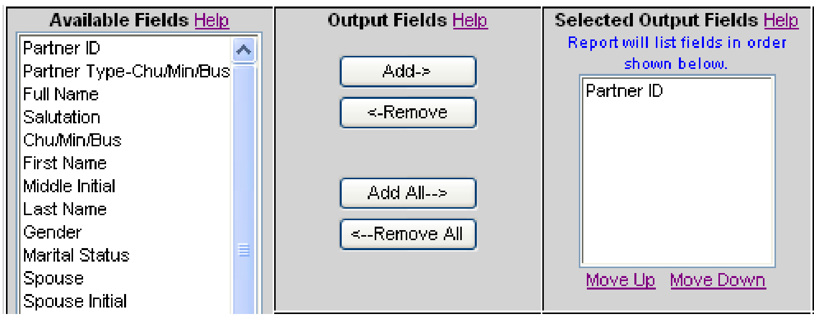


Figure 7-4 Selected Output Fileds

Selected Output Fields: This table shows a list of the data fields selected as output in the order they are to be shown. The order can be changed by highlighting the desired field to be moved and then clicking on either the Move Up Move Up or Move Down Move Down link. The selected field will then be moved one position up or down as selected.

Selected Sort Order: This table shows a list of the fields that will be used to sort the output. Fields that are added from the Available Fields list must be designated as an Ascending (increases in value i.e. 1,2,3, . . .) or Descending (decreases in value i.e. Debbie, Betty, Babs, Ann, . . .) sorted field. The user can sort on a field that is not included in the output.

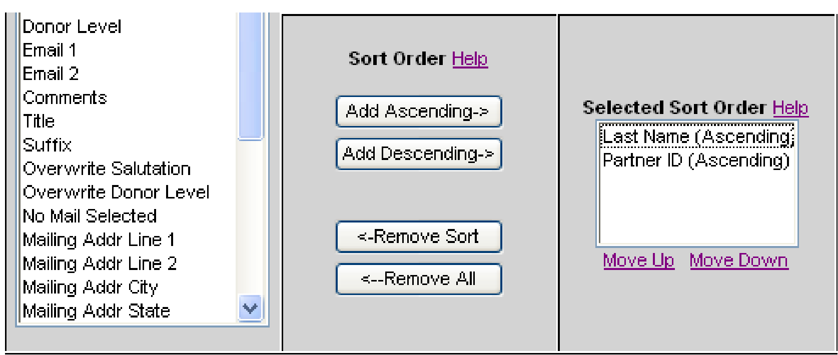


Figure 7-5 Selected Sort Order

When multiple sort fields are selected, the field at the top of the listing is the primary sort filed. This means that regardless of the search results for the other fields, the primary field will have precedence. If Last Name (Ascending) and Partner ID (Ascending) are chosen with Last Name Ascending as the primary sort field, as shown in the figure above, the results will show the names in correct alphabetical order regardless of their Partner ID. The benefit comes when two or more partners have the same Last Name. They will be listed alphabetically in the list of Last Names and then listed by Partner ID within the list of same Last Names.

Partner ID	Last Name
48	Quiton
47	Roark
10	Rowland
4	Rubble
5	Rubble
90	Sanders
50	Sasser
34	Sather
106	Schaefer
11	Schroeder

Figure 7-6 Sort Result Example One

If the order is reversed, the results will show the Partner ID in correct numerical order regardless of their names.

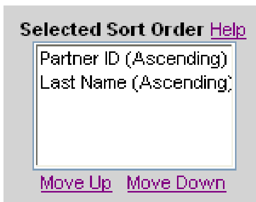


Figure 7-7 Sort Example Two

Partner ID	Last Name
3	Copley
4	Rubble
5	Rubble
6	Darlington
7	Austin
8	McGinnis
9	Mitchell
10	Rowland
11	Schroeder

Figure 7-8 Sort Result Example Two

The Selected Sort Order can be changed by highlighting the desired field to be moved and then clicking on either the Move Up Move Up or Move Down Move Down link. The selected field will be moved one position up or down as selected.

To change a selected field from Ascending to Descending or vice-versa, the field must first be removed by highlighting the desired field and the clicking on the Remove Sort <-Remove Sort or Remove All <--Remove All button. The re-adding the desired field as either ascending or descending.

Even though partner ID is the default, it can be removed form the sort list.

Filters/Conditions: This is the most powerful feature of the Custom Reporting tool. By allowing the user to set their own parameters for defining which records are included in the final report, TheGreatMultitude has given the user a means for designing unique and meaningful report to meet his exact requirements.

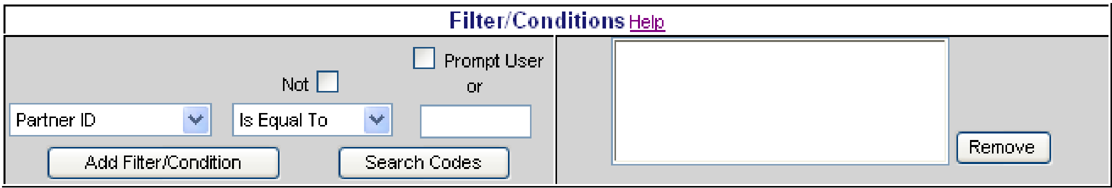


Figure 7-9 Filter/Conditions

To select a field to use as the parameter for the filter, the user must click on the dropdown arrow.

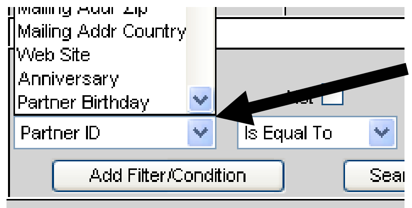


Figure 7-10 Select a field

This will open a dropdown box showing all of the available fields. These are the same fields that were available for sorting. The user then selects the field he wants to use by clicking on it within the dropdown box.

To select a logical operator to use, the user must click on the dropdown arrow.

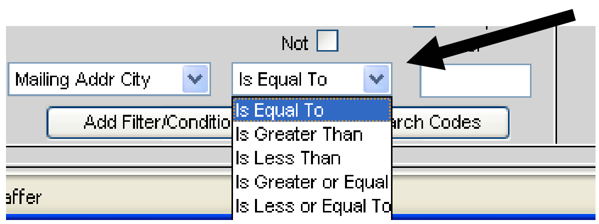


Figure 7-11 Select a Logical Operator

This will open a dropdown box showing all of the available logical operators. The user then selects the logical operator he wants to use by clicking on it within the dropdown box. To change the operator to a negative value, i.e. Is Not Equal To, the user must click on the Not checkbox.

To select the value for the field to be compared against, the user types in the value desired.

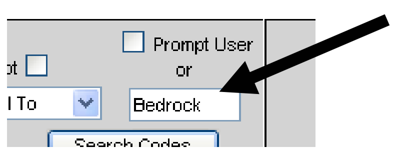


Figure 7-12 Target Value

If the value for the field to be compared against is a blank field, then the user should place a single space (press the spacebar on the keyboard) as the target value. An example would be a report to list the web sites of all Partners. The Filter/Condition would look like that shown below with a space as the target value so that only those Partners <u>with</u> a web site would be listed, Web Site Is NOT Equal to .

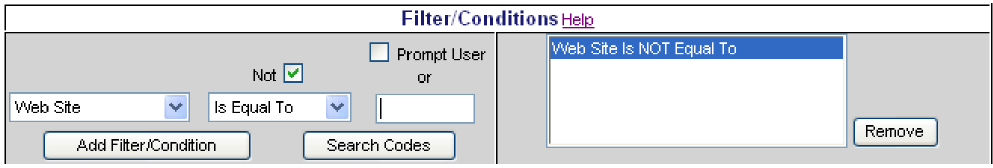


Figure 7-13 Web Site Is Not Equal To

If the user wants to be prompted for this value each time the report is run, he must click on the Prompt User checkbox. When the report is run the Enter User Defined Values for Custom Report window will open prompting the user to type in the appropriate value for this filter.

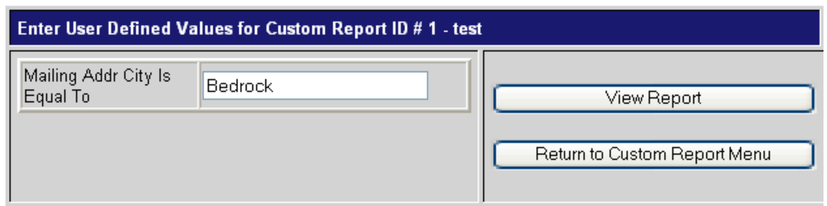


Figure 7-14 Enter User Defined Values Window

This option allows the user to create one report format and change the filtering without creating a new report for every possible filter.

After entering the filter value, the user must click on the View Report button 

to view the report, or the Return to Custom Report Menu button 

to return.

Once the filter has been created, it is necessary for the user to click on the Add Filter/Condition button 

. This will add the filter to the Filter/Condition list.

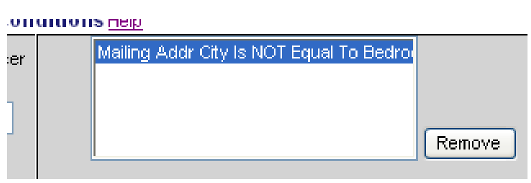
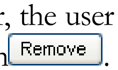


Figure 7-15 Filter/Condition List

To remove a Filter, the user must highlight the desired filter by clicking on it with the mouse and then click on the Remove button 

.

Search Codes can also be used as a criteria for the search by the user clicking on the Search Codes button 

. This will open the Select Report Criteria Window.

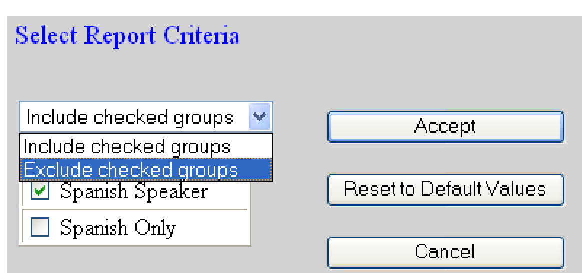


Figure 7-16 Select Report Criteria Window

This will list all of the Search Codes currently in use in TheGreatMultitude. Clicking on the appropriate checkbox will make that Search Code a criterion for the report. By clicking on the dropdown arrow, the user can then select whether records with the selected Search Code are to be included or excluded from the report.

Clicking on the Cancel button Cancel closes the window without accepting the selection(s).

Clicking on the Reset to Default Values button Reset to Default Values deselects all of the Search Codes but does not close the window.

Clicking on the Accept button Accept will move the selected search code into the Filter/Condition list.

Figure 7-17 Adding A Search Code

To remove a Search Code, the user must highlight the Search Code annotation in the Filter/Condition list by clicking on it with the mouse and then click on the Remove button Remove.

While sorts, searches and filters can be powerful tools in generating specific reports, the use of too many sorts, searches and filters can generate more confusion than useful information.

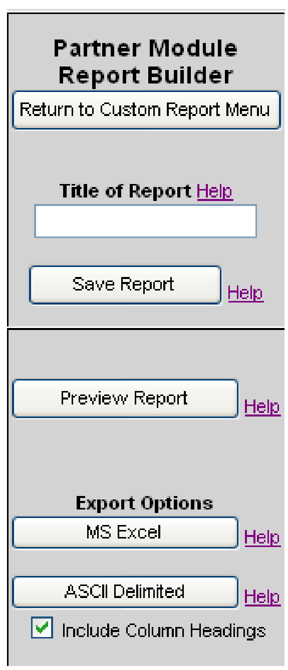


Figure 7-18 Report Control Panel

Report Control Panel:

Once all of the parameters have been set for this report, it is important for the user to preview it to ensure that it produces the desired result. To preview the report, the user must first give it a title in the Title of Report textbox. He will be able to change this title before it is saved.

Figure 7-19 Title of Report Textbox

Once the title has been entered, the user then clicks on the Preview Report button 

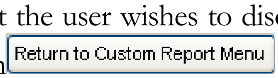
. If the user has included a Filter/Condition that requires a user prompt, the user should save the report as below and then run the report from the Custom Reports Menu. If he does not run it from the Custom Reports Menu, an error message will appear stating "Must Run Reports From Custom Report Menu for Reports with User Defined Values".

Figure 7-20 Error Message

The preview of the report gives the user the opportunity to confirm its accuracy, completeness, and usefulness. If there are any aspects of it which are not correct, this would be the time to change it.

The report may also be previewed as an Excel file or exported as an ASCII Delimited file for export to another database or spread sheet file depending on the user's desires.

Column headings can be included in the report preview by selecting the Include Column Headings box.

Anytime that the user wishes to discontinue designing a report, he may click on the Return to Custom Report Menu button 

to return to the Custom Report menu window.

Once the report is completed and functioning as desired, the user should change the title to something that makes sense and will remind them of the purpose or output of this report. Then the user must click on the Save Report button 

to save the report. A window will open confirming that the report has been saved. The user needs to click on the Return to Custom Report Menu button 

to return to the Custom Report Menu window.

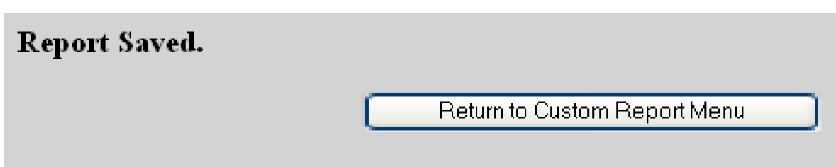


Figure 7-21 Report Saved

7.6 Custom Reports

Once a custom report has been created and saved, the user can perform several functions with it from the Custom Report Menu window.

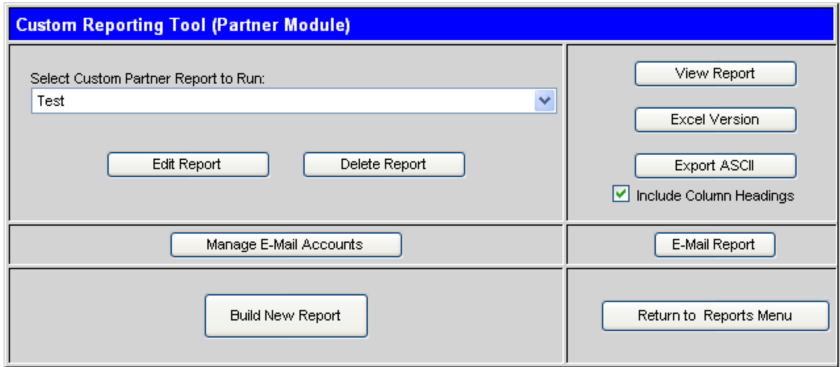


Figure 7-22 Custom Reporting Tool Menu

Select Report: The user must first select the desired report from the drop down menu. Once the report has been selected, the user may delete the repot by clicking on the Delete Report button 

. The user will be prompted to confirm the deletion.

Or the user may edit the report by clicking on the Edit Report button. This will reopen the Partner Module Report Builder.

E-mailing Reports: The reports generated by TheGreatMultitude can be e-mailed to other users. To do so, the user must first click on the Manage E-Mail Accounts button 

. This will open the User Emailer Manager window.

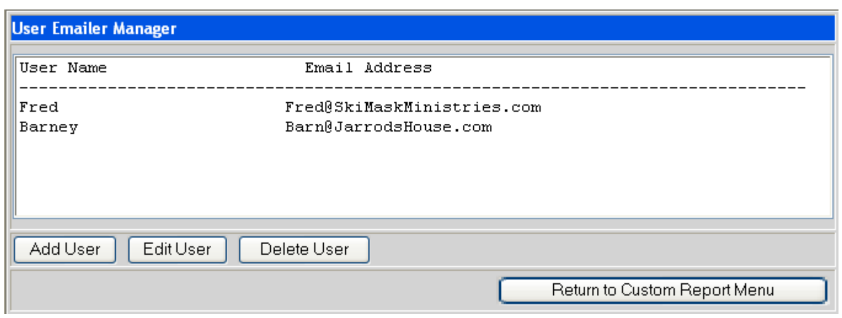


Figure 7-23 User Emailer Manager

The user can edit this list of e-mail recipients by clicking on the appropriate button

To add a users, the user must click on the Add User button 

. This will open the Add New User window.

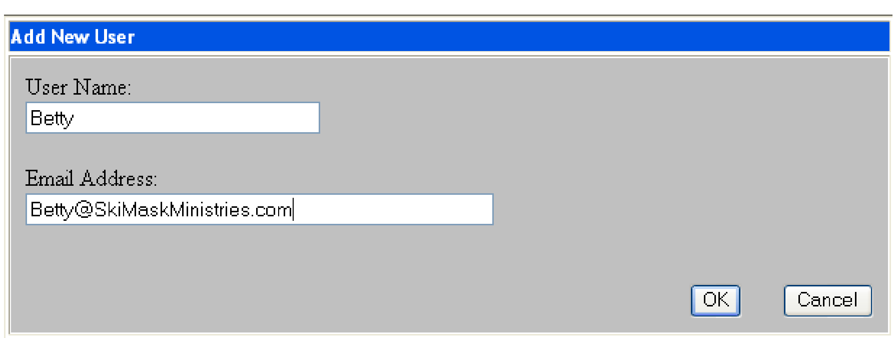


Figure 7-24 Add New User

The user must type in the new user's name and e-mail address and then click on the OK button or the Cancel button as appropriate.

To edit a user, the user must first select the user from the list on the User Emailer Manager window and then click on the Edit User Button. This will open the Add New User window.

To delete a user, the user must first select the user from the list on the User Emailer Manager window and then click on the Delete User button. The user will be prompted to confirm the deletion and then be returned to the User Emailer Manager window.

Once the user has a list of desired recipients for the generated repot in the emailer manager, he should then click on the E-Mail Report button. This will open the User Selection Form Window.

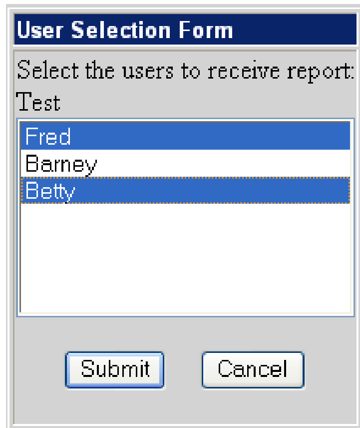


Figure 7-25 User Selection Form

The user may click on the Cancel button to cancel this operation and return to the Custom Reporting Tool Menu. The user must now select which users are to receive a copy of the report. The control key and the shift key may be used to select multiple recipients.

Once all of the recipients have been selected, the user must now click on the Submit button to generate the report and send it the designated recipients. This will cause a message to appear confirming that the report has been sent.

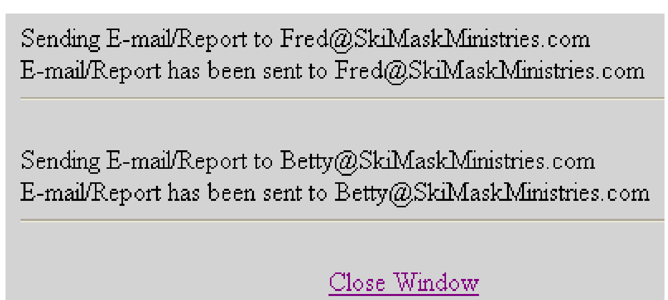


Figure 7-26 Emailer Confirmation Message

Other Buttons: The View Report, Excel Version, Export ASCII buttons and the Include Column Headings Checkbox all function as described above.

The Return to Reports Menu button 

will return the user to the Reports Menu.

7.7 Custom Reporting Tool (Contribution Reports)

Clicking on the Contribution Reports Module icon  on the Vertical Toolbar accesses the Contribution Reports Module. Once the Contribution Reports Module is activated, The Custom Reporting Tool can be selected form the available reports list.

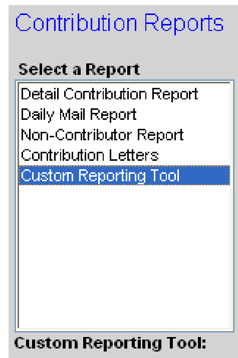


Figure 7-27 Selection – Custom Reporting Tool

Selecting Custom Reporting Tool will open the Custom Reporting Tool page.

The Custom Reporting Tool for the Contribution Reports module is identical to the Custome Reporting Tool for the Partner Reports except for the available fields in the report builder.