800 - HOW TO… REPORTS – *Spreadsheet Style*

How to Create a Report – Spreadsheet Style – Chose the Reports Application (from the left panel) to create a Report and follow this 3 step process:

- Step 1 – Click the Action Button ADD NEW REPORT

You will be on the Query Tab

- Step 2 – SELECTING A REPORT TYPE
  A. Selecting a Report Type is the first and trickiest step in setting up a Query. The Report Type decides which fields you can access for your report.
  B. Determine what level of information you want from the database, and choose a Report Type that reflects that level.
  C. There are 4 main categories of Report Types. The current Report Types are listed under each category.

     1. HOUSEHOLDS (will provide Household contact information including Head of Household and Co-Head information):
        a. Households
        b. Households – Members (similar to the Members Report Type below)
        c. Household Tags

     2. MEMBERS (will provide Household Member information including Sacraments and also their Household level information):
        a. Members
        b. Members – Ministries and Talents

     3. COMMUNITY MEMBERS (will provide contact information for organizations or groups stored as Community Members):
        a. Community Members
        b. Community Tags

     4. CONTRIBUTIONS (will provide Contribution information along with that Household's contact, Head and Co-Head information). There are many Contribution Report Types. The ones listed here are the general Report Types of Contributions:

a. Contributions by Household (can report on contributions by Households)
b. Contributions – All Donors (can report on contributions by Community Members alone or Households alone or Community Members and Households)
c. Contributions – Fund Totals by Quarter
d. Contributions – Household Annual By Fund
e. Contributions – Household Annual By Fund and Activity
f. Contributions – Household Summary All Funds
g. Contributions – Pledge Summary (Non-Recurring Funds)
h. Contributions – Pledge Summary (Recurring Funds)

➢ Step 3 - SELECTING FIELDS TO APPEAR IN THE REPORT

A. Once you pick a Report Type, a list of field names will appear on the screen beneath the Report Type.
B. Click on the fields you want in your spreadsheet report (you can rearrange the order later).
C. Once you have selected the fields you want to appear in your spreadsheet report, Click on **SELECTED FIELDS**. This option is in the middle of the screen and will display all the fields you selected.
D. You can re-arrange the order of how the fields will appear on the report spreadsheet by dragging the fields up or down the list. To collapse the list down again, Click on **SELECTED FIELDS.**

➢ Step 4 – UNDERSTANDING THE REPORT CRITERIA

A. The **CRITERIA** section is listed next. This is where you indicate which records you want included in the report. A new report will default to 2 specific criteria, but those can be changed, deleted, or additional criteria can be added (you must have at least one criteria to run the report).

The default criteria supplied is:

Field	Parameter	Value
Active	equal to	Yes
Parish Household	equal to	Yes

This is usually the most common criteria parishes use. That is why it shows up as the default criteria. But it can be changed.

B. Right above the criteria are the words AND and OR. The AND will be checked indicating that this query will use AND logic to determine which records to pull.
   For the default criteria of Active = Yes AND Parish Household = Yes, the query will give you only Households that have a status of Active and are checked as Parish Households. It will not include Inactive, Archived or Deceased Households. It will not include Active Formation or School Households unless they are also Parish Households.

C. Most commonly, AND logic is used, but you can change this to OR logic. You can also have nested levels of logic which use a combination of ANDs and ORs. That type of logic will be addressed in a later section.

- Step 5 – SETTING UP THE REPORT CRITERIA

A. To Change Criteria:
   1. Click on the field name and select the field you want to use instead of the shown field.
   2. Click on the selection parameter and choose the selection parameter you want to use.
   3. Click on the value and either enter the value or choose from a list of values supplied.

B. What do the selection parameters mean?
   1. “equal to”, “not equal to”, “less than”, or “greater than” are self-explanatory.
   2. “contains” means the field must contain the string you specify in the value field.
   3. “in” means the field must include one of the checked possible values.
   4. “not in” means the field cannot include have one of the checked possible values.
   5. “in” and “not in” are used for fields which have a defined menu list choose from when populating the field in the system (as opposed to free text).

C. To Add Criteria:
   1. Click the plus sign - + - which is on the right side of the screen next to the Criteria section.
   2. Follow the steps above to change criteria.

D. To Delete Criteria:
   1. Click the minus sign – which is on the right side of the criterial you want to delete.

- Step 6 - ORDER BY
  - A. All of the fields which will be listed in your report will be in the list to choose from. Click on the field that you want your report sorted by.
  - B. Select whether you want the report to sort in Ascending or Descending order.
  - C. Click [Add Field to Order By] to specify further sort fields (Ascending or Descending).

- Step 7 - OTHER FIELDS ON THE REPOR QUERY SCREEN

There are 3 other query fields to populate on this screen before you can save the report query.

1. QUERY NAME – Name your query report so you can find it in the Reports Listing screen. You may want to come up with a naming scheme for your office so you group reports together based on department and you can more easily search for a group of reports. The Report listing will always be in alphabetical order.

A. DESCRIPTION – Describe what the report does or when you have used it. You may want to put your initial or user name in either the Query Name or Description so other users at your parish know who created the report.

B. SELECT ACCESS LEVEL – Decide who should have access to your report query, whether it is only for you to see or if others can see it too (to either run it OR copy and modify it). For the time being, it is best to choose “Everyone” or “Everyone – Read Only.” The options are:

Private

Role

Everyone

Everyone – Read Only

- Step 8 - Click on SAVE to save this report query. Don’t forget this step!!!

HOW TO RUN A QUERY

- Step 1 - Click on the PREVIEW Tab to run this query. The results will show up on the screen.
  - A. The number of records in the report will show up at the bottom right of your screen.
  - B. You can go through the report on the screen by clicking the Next arrow at the bottom right of the screen or you can save it to an excel file.

- Step 2 – Save the report as a file

  A. Enter a file name (no spaces or special characters) and Click EXPORT to save this spreadsheet report to your Downloads. You can than access the file (it will be an excel spreadsheet), save it elsewhere, change it, print it, or email it.
  B. If you are using Chrome, the downloaded file will drop down to the bottom left of your screen. You can click on the file to open it. Otherwise, check your downloads for the file.

HOW TO MODIFY A QUERY

- Step 1 - Click Query to get back to your query screen.

  At this point you can change any part of your query including:

  A. Selecting more fields to include in your report (by clicking on the field to check the box next to them).
  B. Un-selecting fields to no longer include them in your report (by clicking in the field to un-check the box next to them).
  C. Re-arranging the order the fields appear on the report by dragging the fields up or down.
  D. Add/delete/Change criteria (explained above).
  E. Change the Sort Order.

- Step 2 - Remember to Click Save to save those changes before you exit out of the query.