

A person's hands are shown typing on a laptop keyboard. The laptop screen displays the Tractivity software interface, which includes a sidebar with navigation options and a main area with a table of data. The entire image is covered with a semi-transparent red overlay.

All Projects Reporting

Tractivity v24.1

Tractivity[®] Help Guides

All Projects Reporting

Tractivity's All Project Reporting gives System Admin users the ability to report on data across a multi-project platform. This removes the need to report on each project and amalgamate the information together outside of Tractivity, saving you valuable time and resource.

With this area of the Reports module, you can:

- Select yes(1) or no(0) when running a report, giving you the choice to see project specific data or multi-project data.
- Have complete system-wide analysis across the majority of Tractivity's 140 available reports.
- Have complete control over who has access to this information via System Admin access.

All Projects Reporting - Overview

Tractivity allows you to have multiple projects within one system to manage your ongoing stakeholder work.

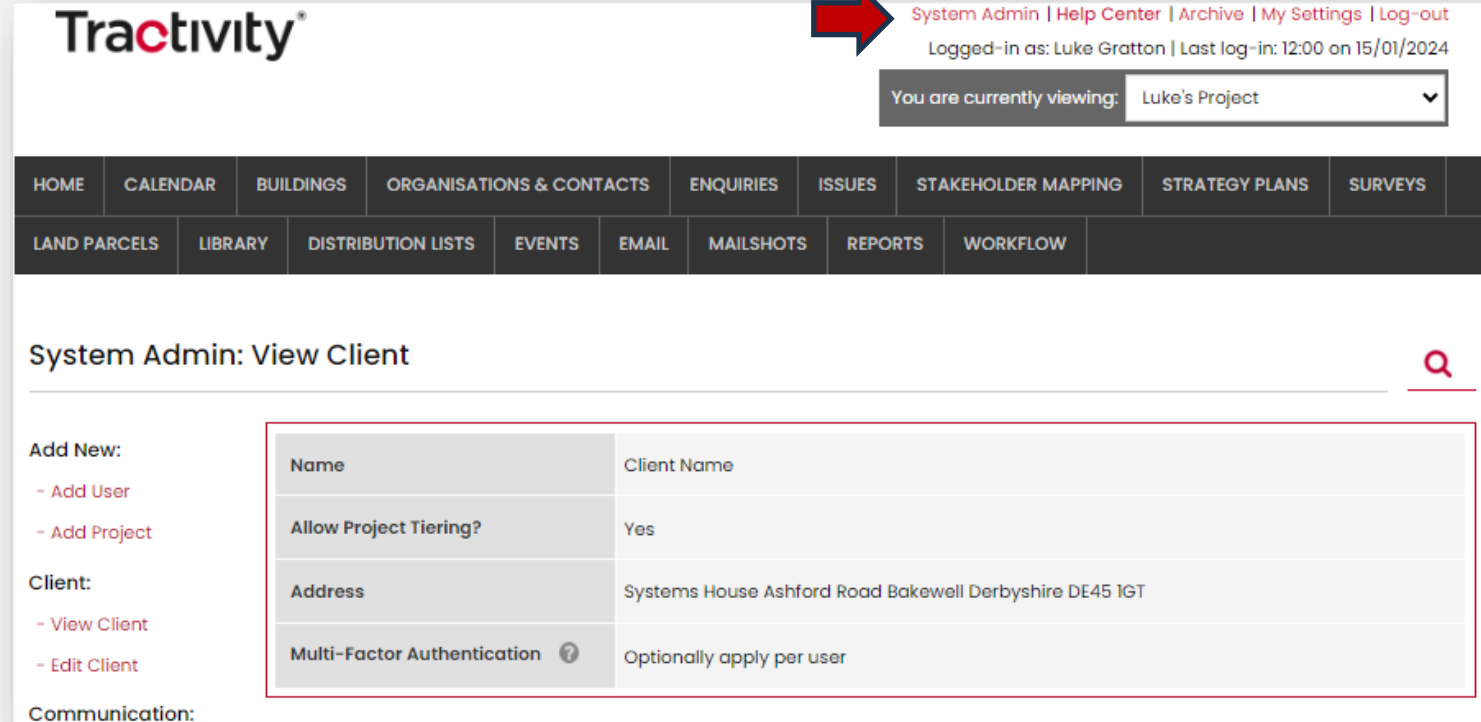
In the instance that you do have multiple projects, you can run reports to include all projects.

To ensure you can run 'All Project' reports you will require System Admin access.

You will have the flexibility to choose who does and does not have System Admin access, but please do note this function enables more than just 'All Projects' reporting.

If you'd like to learn more about System Admin and its functions, please contact your dedicated Customer Success Manager.

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The screenshot displays the Tractivity System Admin interface. At the top, the Tractivity logo is on the left, and the top navigation bar on the right contains links for System Admin, Help Center, Archive, My Settings, and Log-out. Below these links, it shows the user is logged in as Luke Gratton, with a last log-in time of 12:00 on 15/01/2024. A dropdown menu indicates the user is currently viewing 'Luke's Project'. The main navigation bar includes tabs for HOME, CALENDAR, BUILDINGS, ORGANISATIONS & CONTACTS, ENQUIRIES, ISSUES, STAKEHOLDER MAPPING, STRATEGY PLANS, SURVEYS, LAND PARCELS, LIBRARY, DISTRIBUTION LISTS, EVENTS, EMAIL, MAILSHOTS, REPORTS, and WORKFLOW. The page title is 'System Admin: View Client'. On the left, there are sections for 'Add New' (with links for Add User and Add Project), 'Client' (with links for View Client and Edit Client), and 'Communication'. The main content area shows a table with client details:

Name	Client Name
Allow Project Tiering?	Yes
Address	Systems House Ashford Road Bakewell Derbyshire DE45 1GT
Multi-Factor Authentication ?	Optionally apply per user

2

Reports Module

Tractivity's Reports module provides access to 140 reports, allowing you the ability to pull a multitude of data around your ongoing projects including:

- All Contacts/Organisations added to Tractivity over a period using date/time parameters
- Your interactions (enquiries/activities) by date and time
- All attendees to past events
- Your mailshot statistics

And many more!

It's now possible to pull this information across all your projects. This is a massive benefit if you have **more than 1 project database in your system.**

The screenshot shows the Tractivity System Admin interface. At the top, the Tractivity logo is on the left, and user information (System Admin, Help Center, Archive, My Settings, Log-out) and login details (Logged-in as: Luke Gratton, Last log-in: 12:00 on 15/01/2024) are on the right. A dropdown menu indicates 'You are currently viewing: Luke's Project'. Below this is a navigation bar with various modules: HOME, CALENDAR, BUILDINGS, ORGANISATIONS & CONTACTS, ENQUIRIES, ISSUES, STAKEHOLDER MAPPING, STRATEGY PLANS, SURVEYS, LAND PARCELS, LIBRARY, DISTRIBUTION LISTS, EVENTS, EMAIL, MAIL, REPORTS, and WORKFLOW. A red arrow points to the 'REPORTS' module. Below the navigation bar, the page title is 'System Admin: View Client'. On the left, there are links to 'Add New' (Add User, Add Project), 'Client' (View Client, Edit Client), and 'Communication'. On the right, a table displays client information:

Name	Client Name
Allow Project Tiering?	Yes
Address	Systems House Ashford Road Bakewell Derbyshire DE45 1GT
Multi-Factor Authentication ?	Optionally apply per user

How to Run 'All Projects' Reports (1/2)

Head over to the Reports module (we recommend once you're here, clicking **View Fullscreen**)

1. Select the report you wish to run, e.g. 'All Contacts'. Using the 3-line icon, click 'Run Report'.

Please note: depending on the report you wish to run, the choices of parameters will differ. If you'd like to learn more about Reports in general, please contact your dedicated Customer Success Manager.

2. You will see a 'parameter' appear, which asks if you'd like to view data across all projects. To see all projects, simply change the value from 0 to 1 and click 'Continue'

Please note: general users (without System Admin access) will be able to see this parameter, but if they do select 1=yes, **they will not be able to see all projects data.**

The screenshot displays the Tractivity application interface. At the top, a navigation bar includes links for HOME, CALENDAR, BUILDINGS, ORGANISATIONS & CONTACTS, ENQUIRIES, ISSUES, STAKEHOLDER MAPPING, STRATEGY PLANS, and SURVEYS. Below this, a secondary bar contains LAND PARCELS, LIBRARY, DISTRIBUTION LISTS, EVENTS, EMAIL, MAILSHOTS, **REPORTS**, and WORKFLOW. The 'REPORTS' tab is active, showing a 'Reports: List' section with a 'VIEW FULLSCREEN' button and a search icon. A red arrow points to this button.

Below the navigation bar, a 'Getting Started' sidebar is visible. It contains a search bar and a list of reports under the 'Reports' section. The 'All Contacts' report is selected, and a context menu is open, showing options like 'Run Report', 'Export As', 'Schedule Report', 'Email Report', 'Rename', 'Duplicate', 'Delete', and 'Download'. A red circle with the number '1' highlights the 'Run Report' option.

The main content area shows the 'Apply Parameters' dialog for the 'All Contacts' report. It has a table with two columns: 'Name' and 'Value'. The first row has the name 'View data across all projects (1 = yes, 0 = no). This will only apply if you are a Tractivity admin user.' and a value of '1'. A red circle with the number '2' highlights the value input field. At the bottom of the dialog are 'Continue' and 'Cancel Run' buttons.

How to Run 'All Projects' Reports (2/2)

3. You can select the relevant parameters for the report, e.g. date/time filters and any other filters based on your stakeholders, for example: Stakeholder Category.

4. Once you're happy with the report, click 'Okay'.

5. As you have selected yes(1) to report across all projects, you'll notice the very first column is called **Project** which indicates the project the contact/information has been taken from.

Report Filters

Select filter fields to include on report

Account Handler

Account Handler

Account Handler ID

OrganisationID

3

Filter By

Contact.Created Date

Title

Please enter a date range

fx ^ v x

Less Than

07/04/2024

AND With Next Filter

☐ Group With Next Filter

+ Add

+ Add Formula

SUMMARY

Please enter a date range < '07/04/2024'

4

Okay

Cancel

All Contacts

5	Project	Contact ID	Title	Contact Name	Known As	Job Title
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For any questions around this or other User Guides, please contact your dedicated CSM or the wider team at: customersuccess@tractivity.co.uk

www.tractivity.co.uk