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

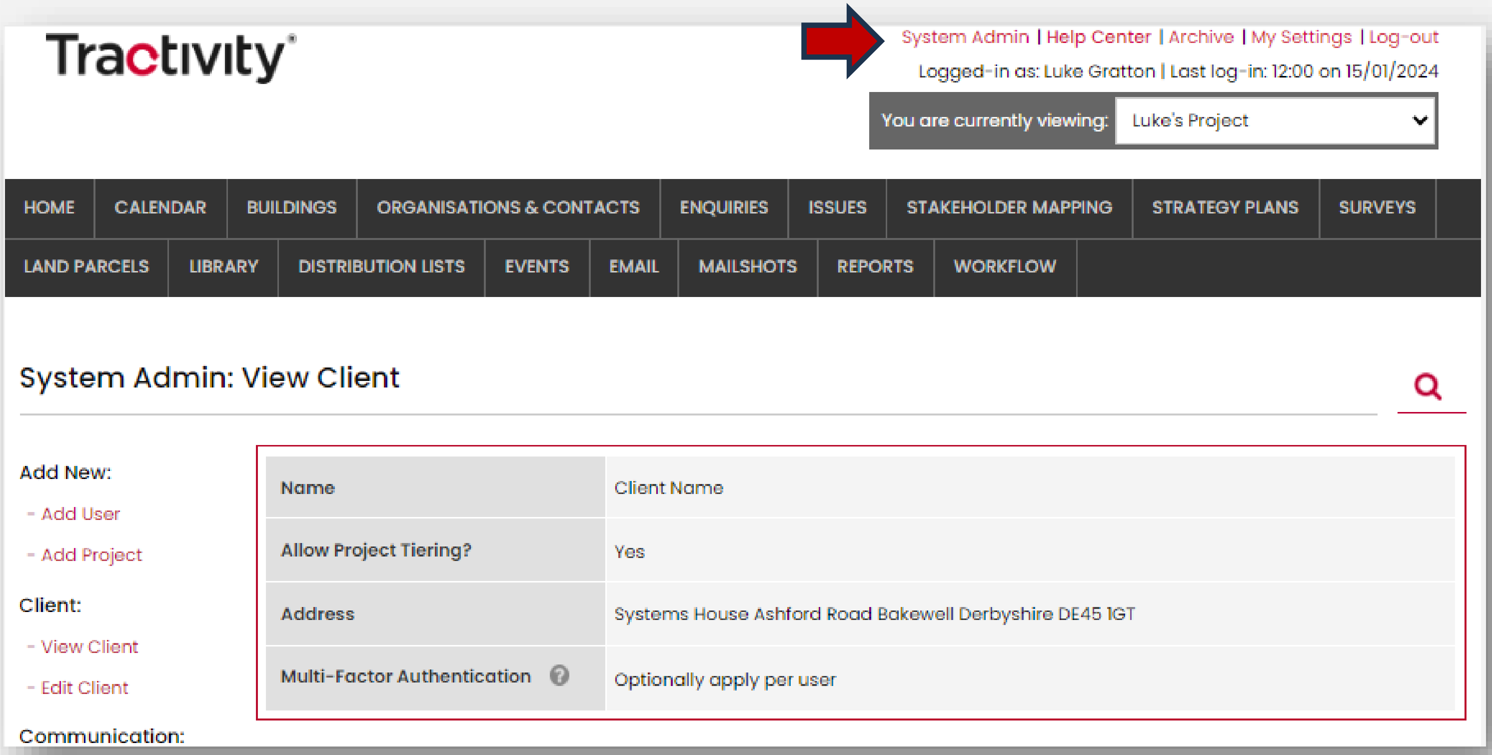
Tractivity allows you to have multiple projects within one system to manage your ongoing stakeholder work.

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.



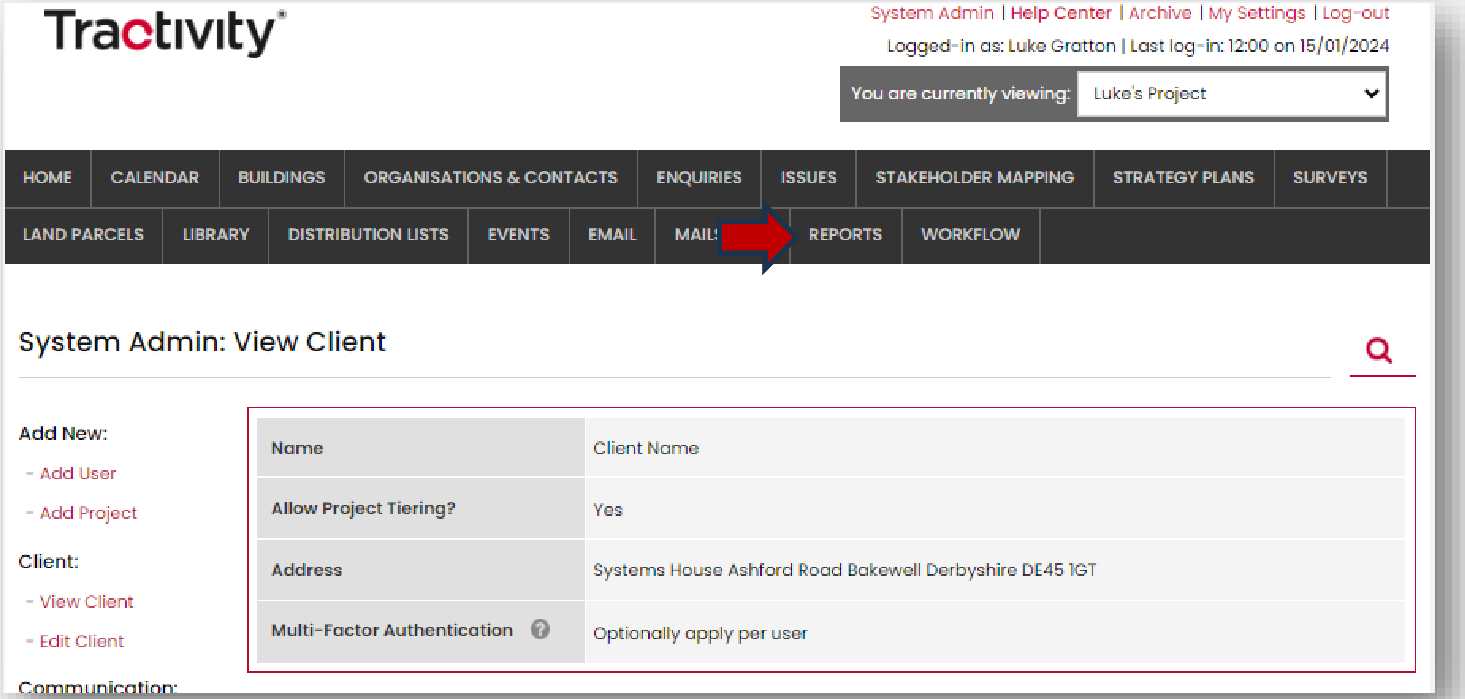
Reports Module

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.**



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

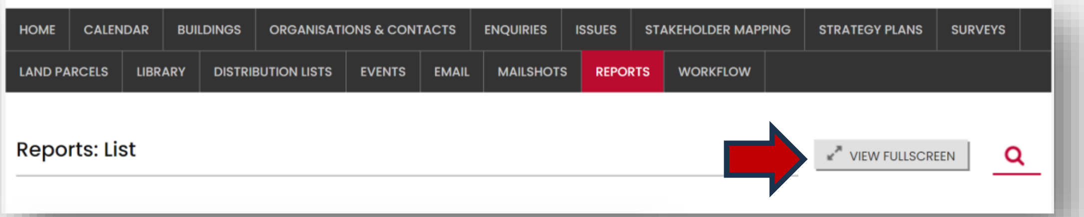
Head over to the Reports module (we recommend once you're here, clicking *View Fullscreen*)

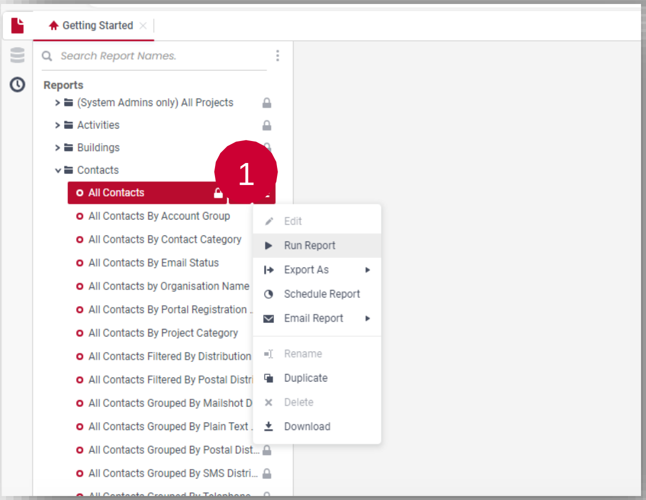
1. Select the report you wish to run, e.g. 'All Contacts'. Using the 3-line icon, click 'Run Report'.

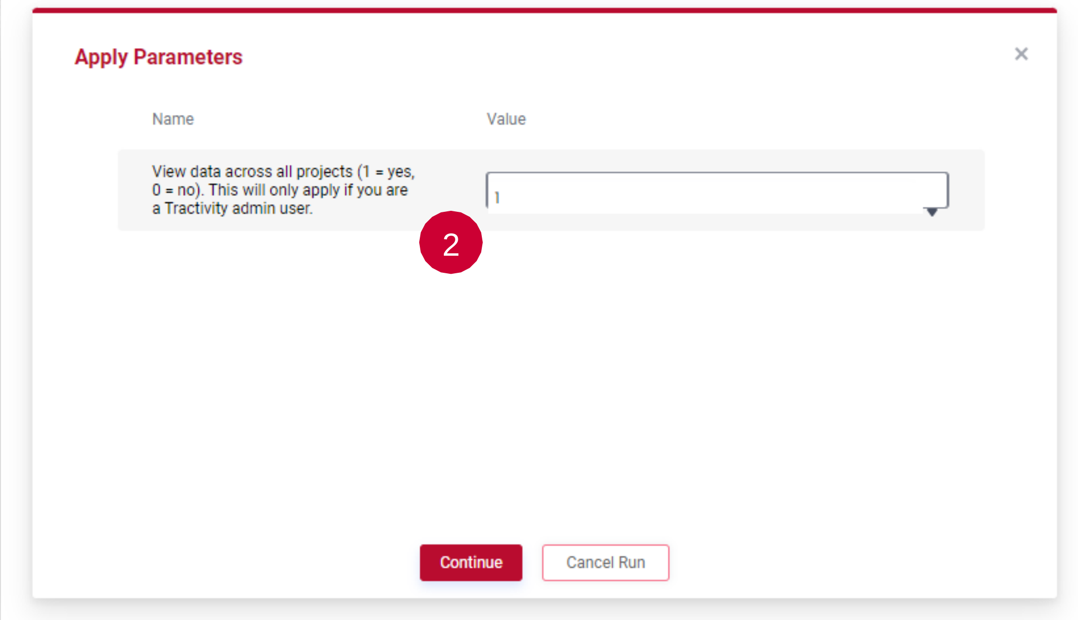
Please note: *depending on the report you wish to run, the choices of parameters will differ. If you'd like to learn more about Reports in general, please contact your dedicated Customer Success Manager.*

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.***





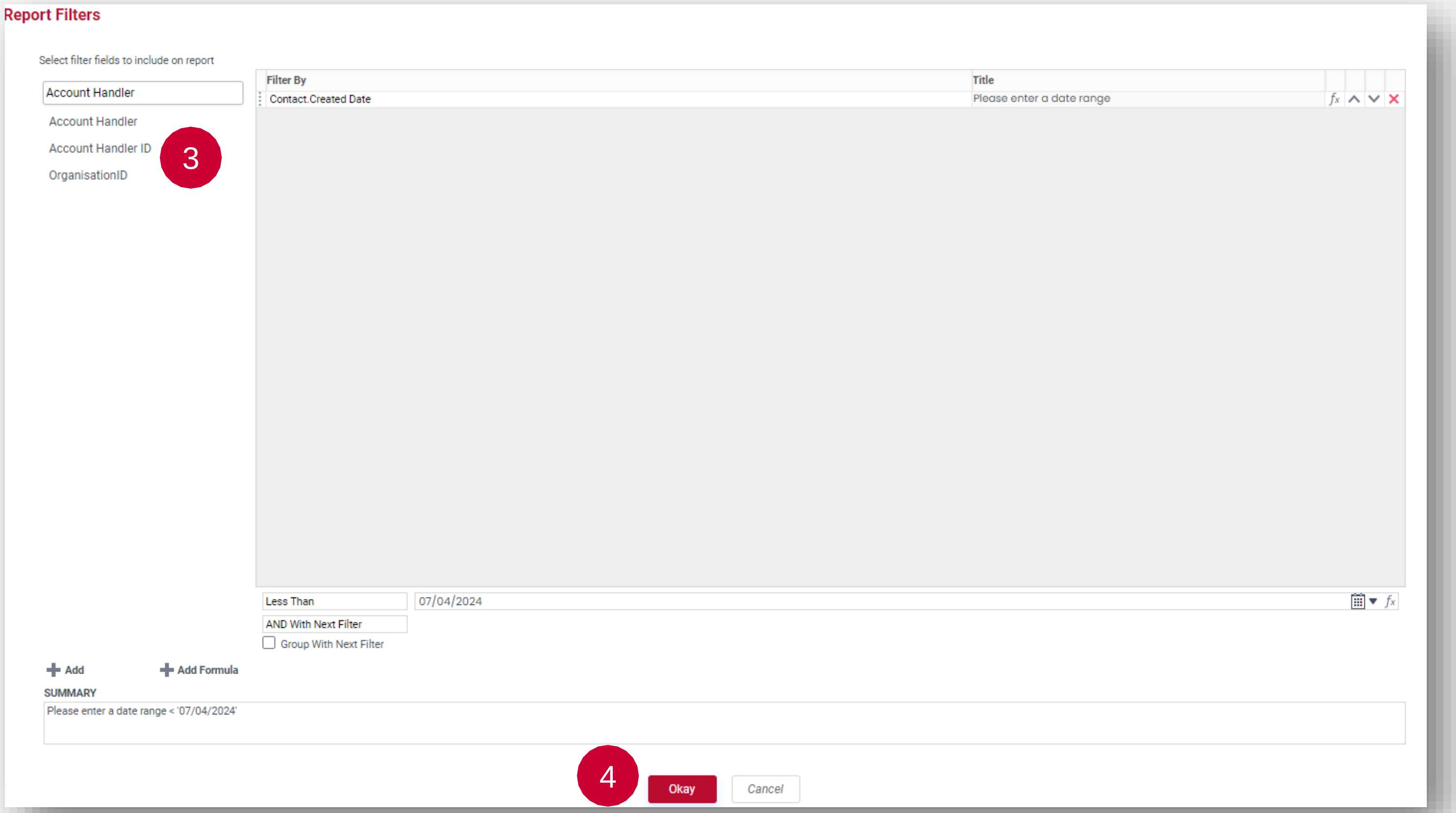


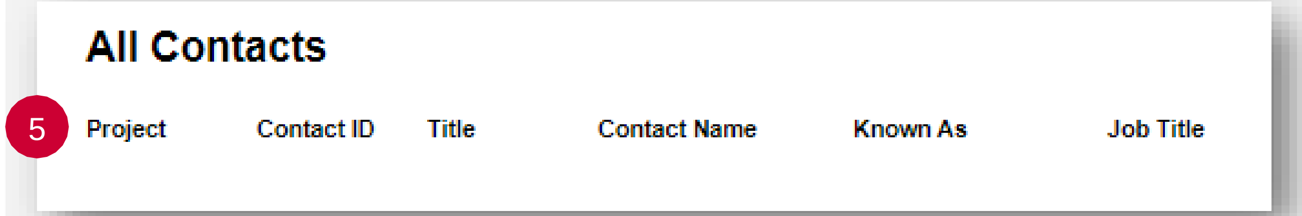
How to Run 'All Projects' Reports (2/2)

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.





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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

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