Reports module

Tractivity® Help Guides

Reports

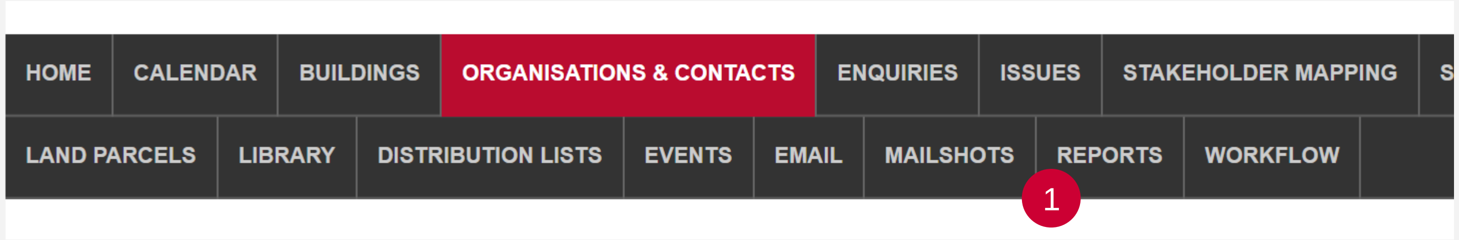
The Reports module allows to you to generation reports from any data stored in Tractivity.

If you need to gather data on your stakeholders, your interactions with your stakeholders, your events, emails, or any other stakeholder engagement you have undertaken, the Reports module is invaluable. This guide will show you how to run Reports that collect this data and present it in a clear, easy-to-interpret fashion. Additionally, you can see how to download these Reports to your device, to share with colleagues or use in projects.

The Reports module

Firstly, we need to make our way to the Reports module.

Log into Tractivity, then click on the Reports option from the black navigation bar. You will find this at the top of your page. (Fig.1)

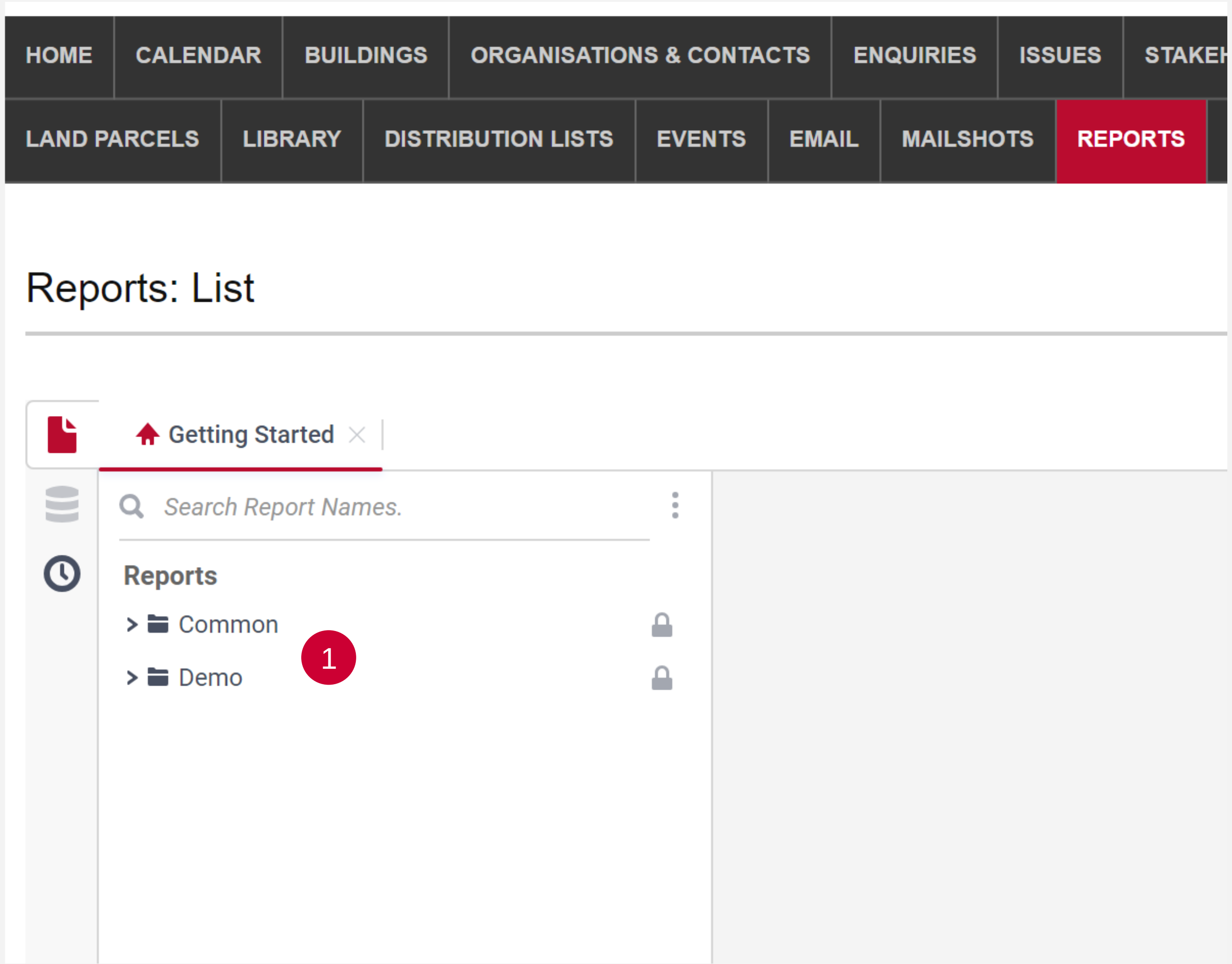


Using the Reports viewer

Now we are in the Reports module, you will see the Reports viewer on your screen.

1. You can see two folders, named Common and Demo (Fig. 1).
2. Click on the arrow next to the Common folder to display all Common Reports.

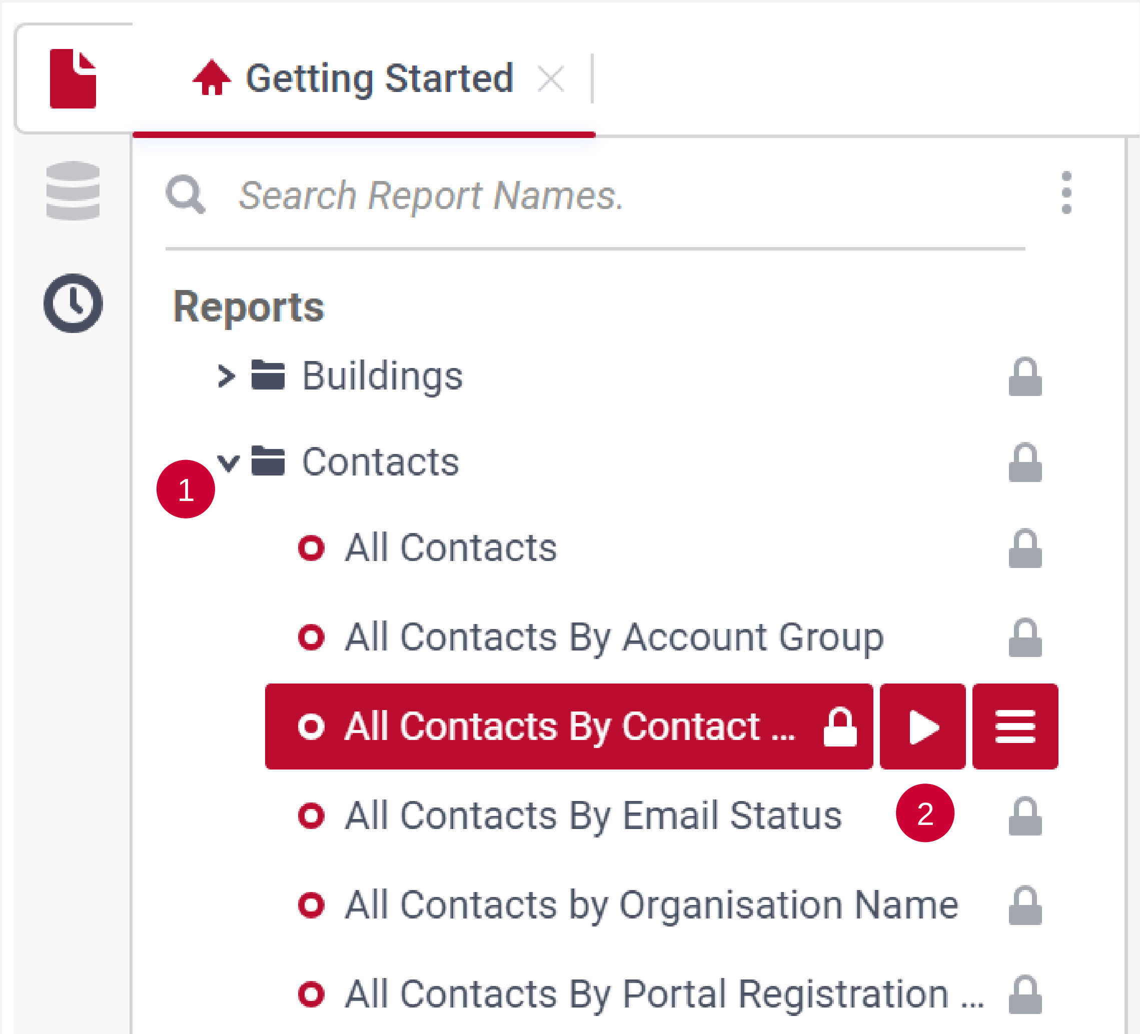
TIP: The “Demo” folder will be named after your organisation on your system. (For example, if your organisation is named ‘Joe Bloggs Ltd’, this second folder will be named ‘Joe Bloggs’ or ‘Joe Bloggs Ltd’.) You will find custom reports in this folder – ask your Customer Success Manager for more information on custom reports.



Running a Report (1/2)

Now we are in the Reports module, you will see the Reports viewer on your screen.

1. Select the folder for the record you want to run a report on. (Fig. 1 uses the Contacts folder as an example.)
2. Find the Report you want and click on it.
3. Click the “play” button by this Report to run it (Fig. 2).

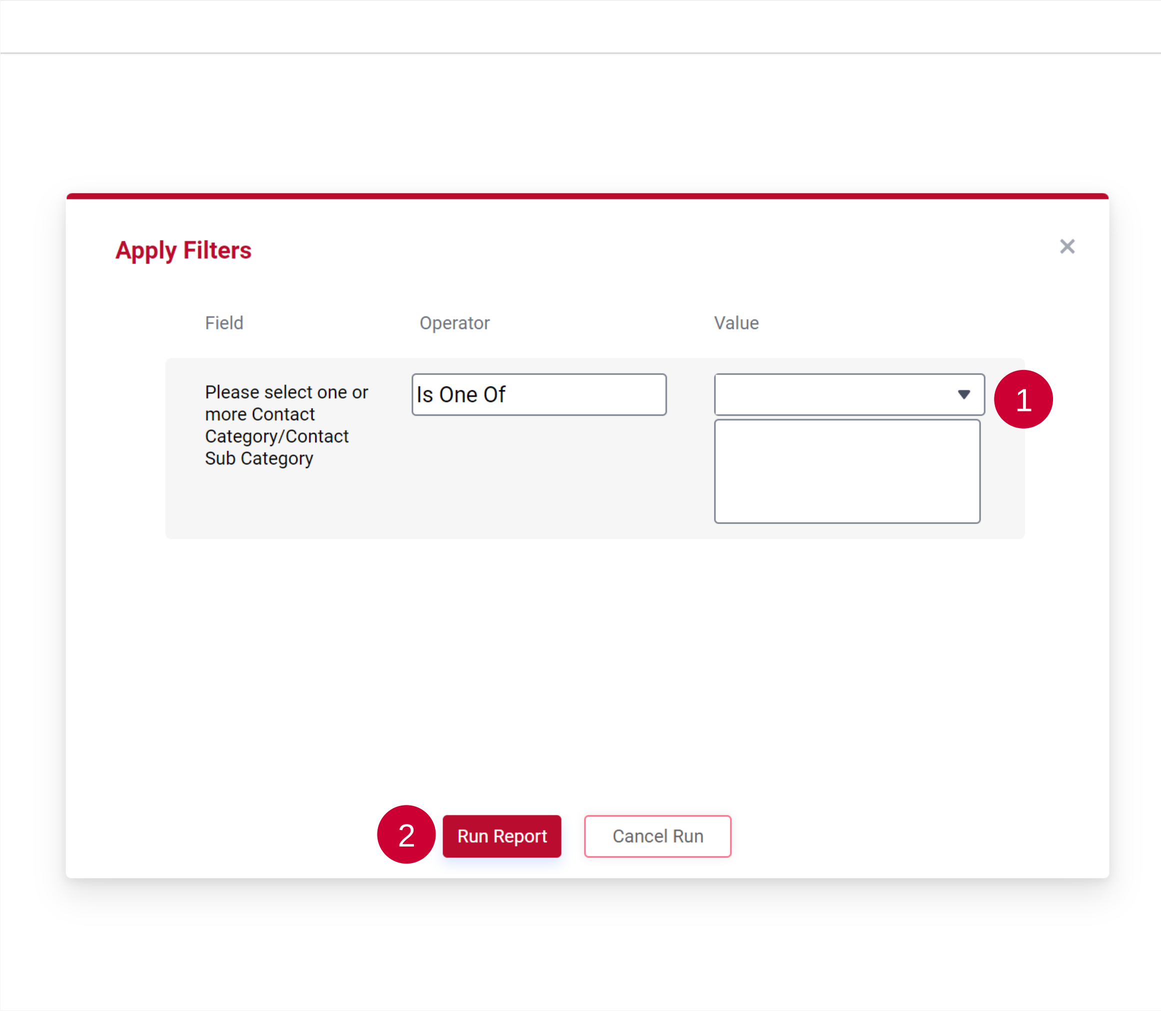


Running a Report (2/2)

The Report's filter will display on the right-hand side of the Report Viewer. This will need completing before the report can be ran.

TIP: Clicking the "View Fullscreen" button will expand the Report Viewer to fit your entire browser window, letting you see more of the report at once.

1. Select an option for each filter from the drop-down menu (Fig.1).
2. Once completed, click 'Run Report' (Fig.2). The report will then be displayed.

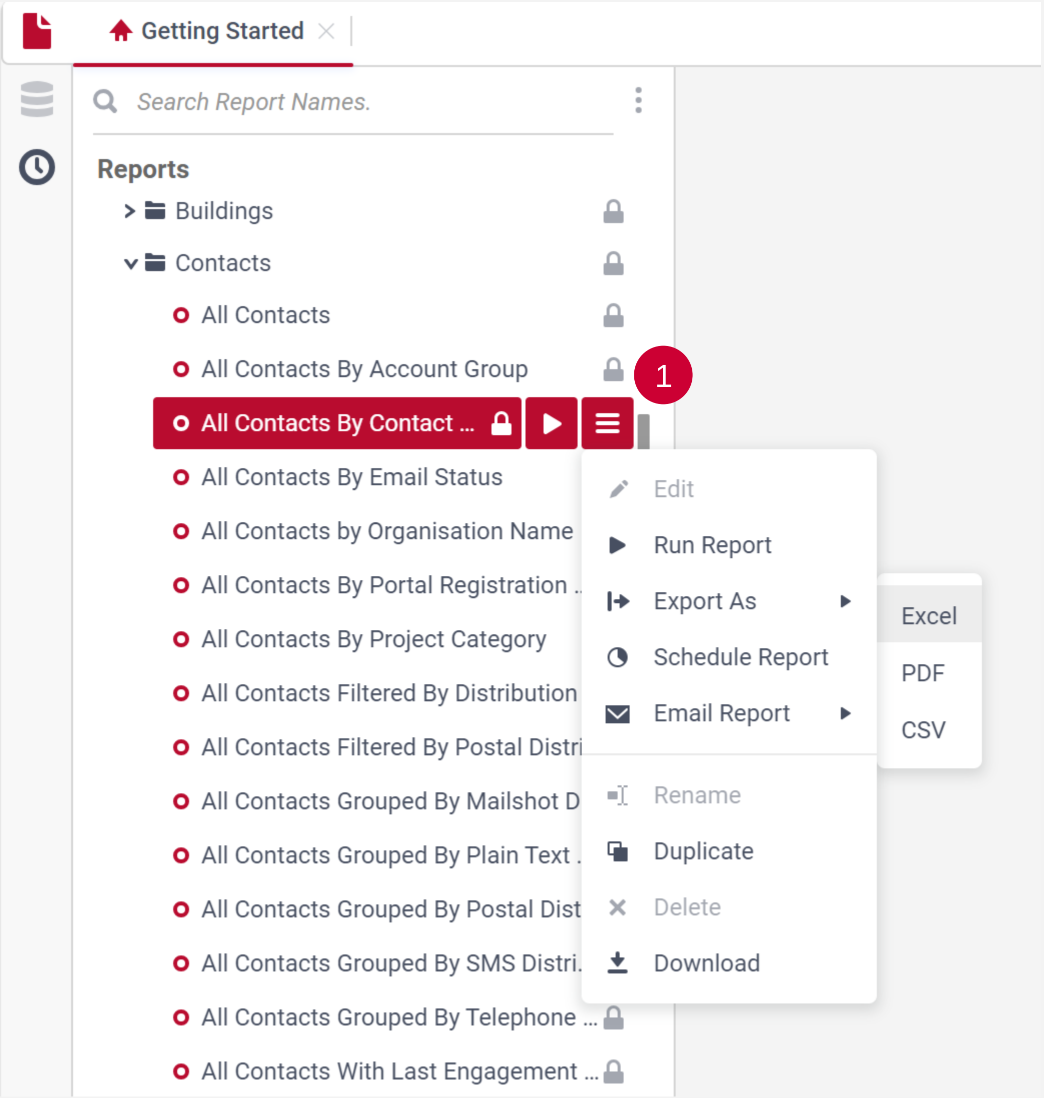


Exporting the Report

To download a Report, you will need to once again locate the report you need from the right folder under “Common Reports”.

1. Instead of clicking the play button, click the button with three lines, found next to it. (Fig.1)
2. Select “Export As” from the menu that appears.
3. Choose one of the three options that appears to download the report as either a PDF, Excel file (.xlsl), or CSV file.

If the report includes a filter, you will need to complete the filter as before, then click Run Report.

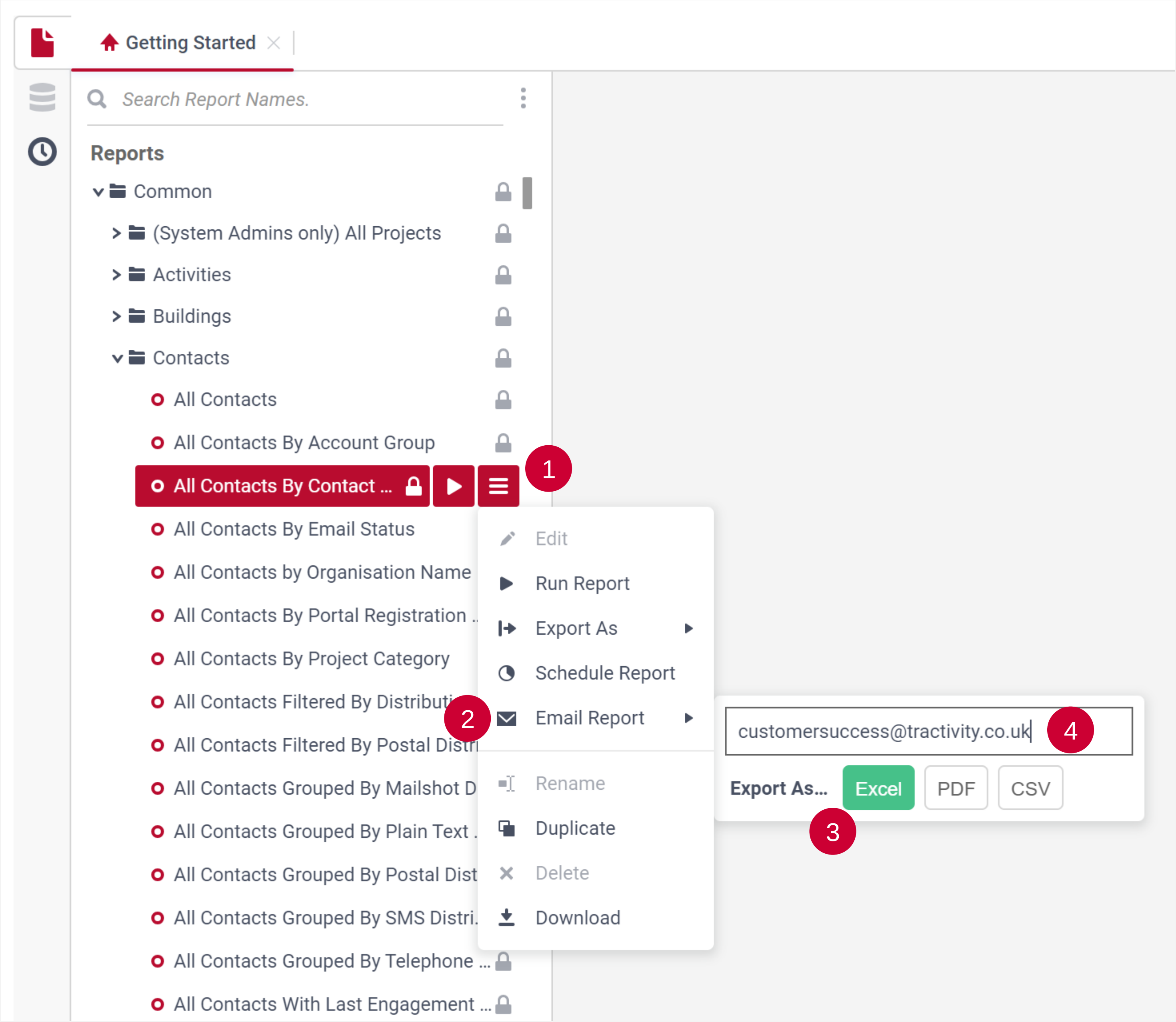


Emailing a Report

You are also able to email a report directly to an email address of your choosing. The email will include your report in the format you wish as an attachment.

1. Click the report you want to email, and then click the button with three lines that appears (Fig.1)
2. Select “Email Report” from the menu that appears. (Fig.2)
3. Choose one of the three options that appears to export the report as either a PDF, Excel file (.xlsl), or CSV file. (Fig.3)
4. Enter the email address you want to send the report to (Fig. 4)
5. Complete the report filters if there are any, then click Run Report (see slide 6).

The report will be emailed to you as soon as it has been completed.

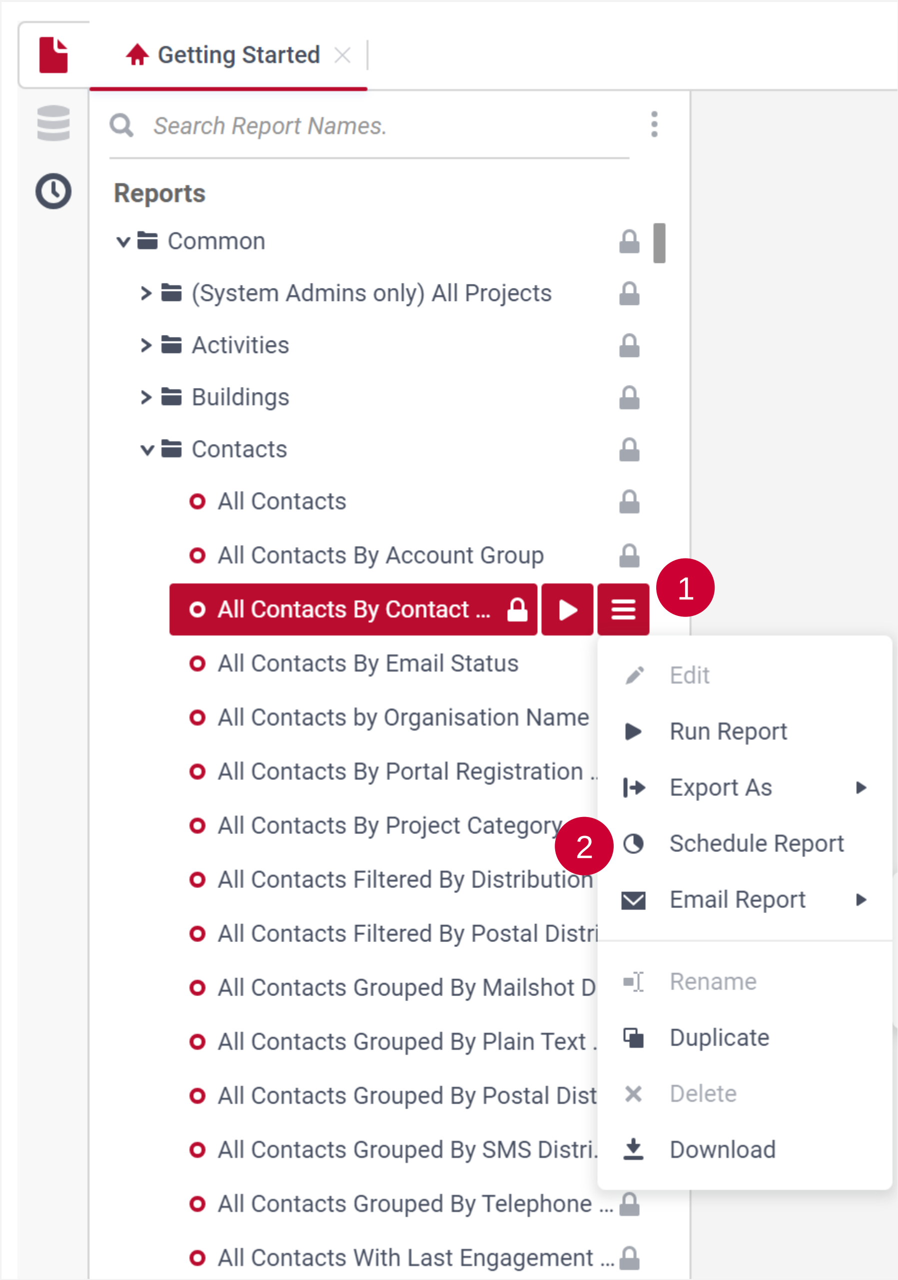


Scheduling a Report (1/3)

Reports can be scheduled to run at a time and date of your choosing. They can even be set up to repeat the report on an ongoing basis.

1. Click the report you want to schedule, and then click the button with three lines that appears (Fig.1)
2. Select “Schedule Report” from the menu that appears. (Fig.2)

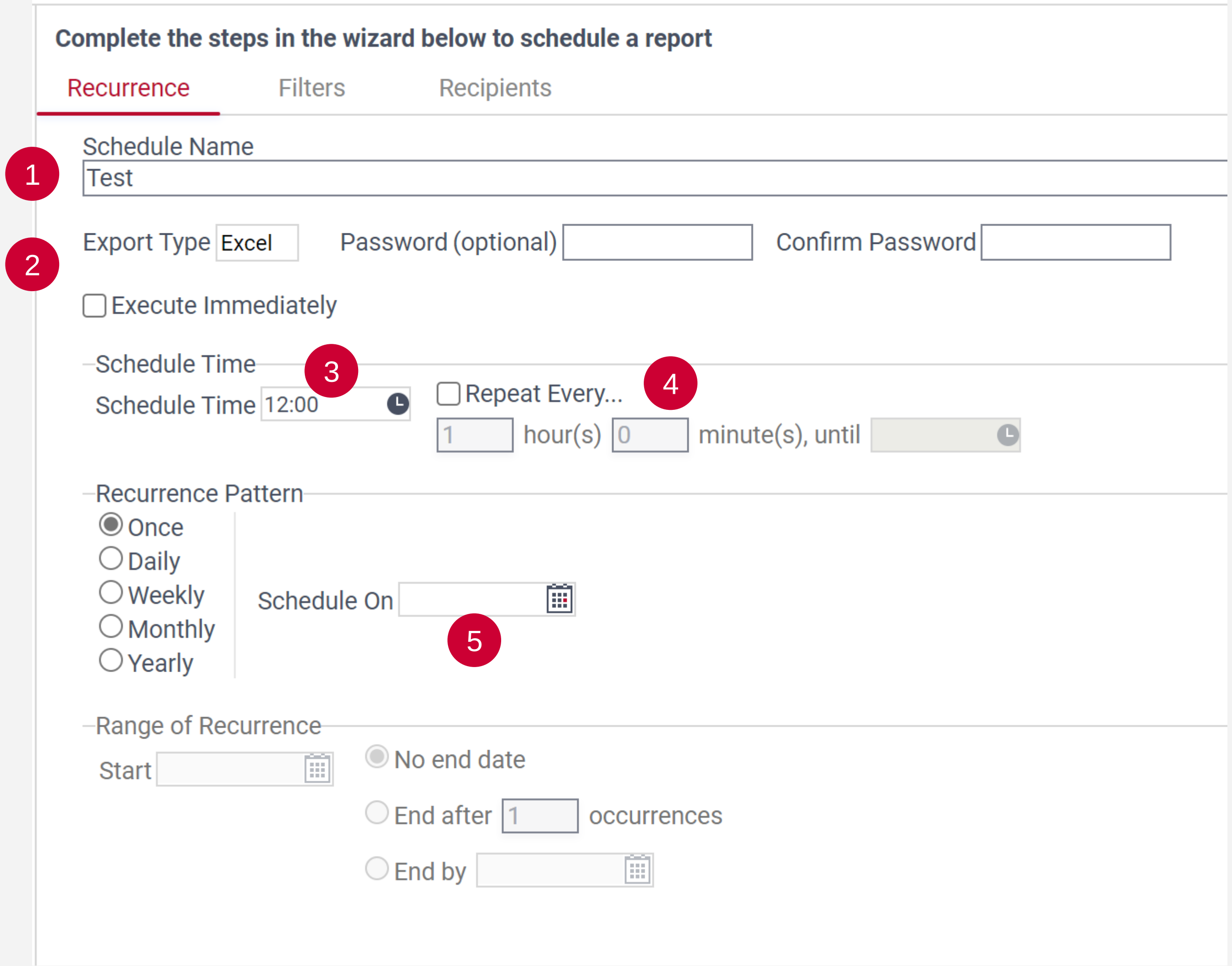
This will load the Schedule Report page in the right-hand window of the Report Viewer.



Scheduling a Report (2/3)

The Recurrence tab on the Schedule Report page will ask you to complete the following fields:

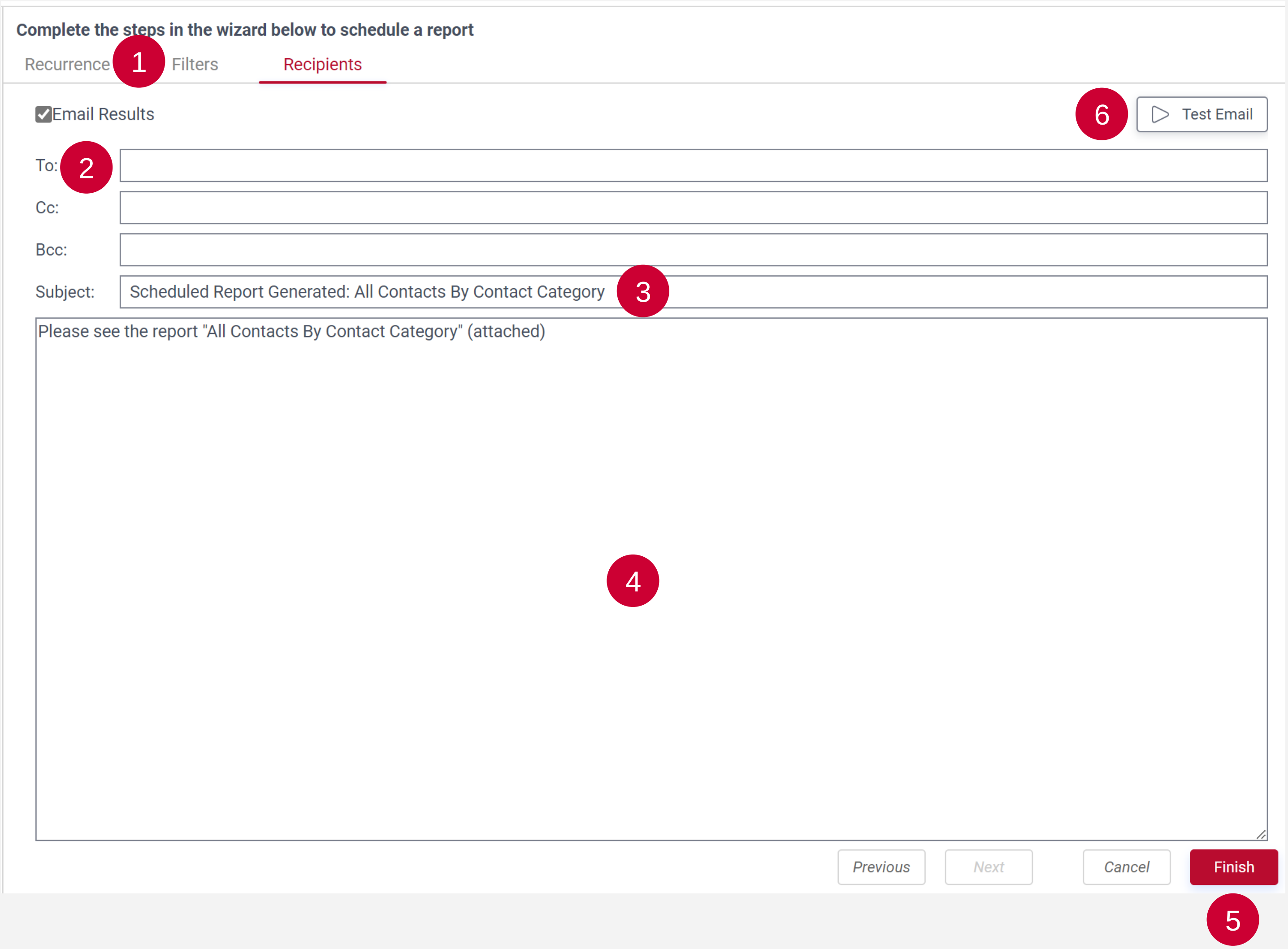
1. **Schedule Name:** Enter a title for this scheduled report.
2. **Export Type:** This is the format of the file, either Excel, CSV or PDF. You can also choose to add a password to the file.
3. **Schedule Time:** You can choose to generate the report immediately, or you can select a time for the report to be generated (Fig.3). You can also repeat the report on an hourly basis (Fig.4).
4. **Recurrence Pattern:** Use this option to repeat the report every day, week, month of year. Select the date you want to generate the report on (Fig.5).
5. **Range of Recurrence:** You can use this option to manage how long the report will repeat for, if at all.



Scheduling a Report (3/3)

1. Complete the Filters tab (Fig.1) to add any filters to your report (see Slide 6).
2. On the Recipients tab, enter the email address(es) you want to send the report to (Fig.2). You can also Cc and Bcc any other addresses you want to receive your emailed report.
3. Complete the Subject line (Fig.3) and the body of your email (Fig.4).
4. Once you have written your email, click Finish to schedule your email (Fig.5)

TIP: Do you want to review the content and format of your emailed report before sending it to its recipients? Use the 'Test Email' button (Fig.6) to send a preview of the email to an email address of your choice. You can use this to send yourself the email, make sure you're happy with it, then return and press Finish.



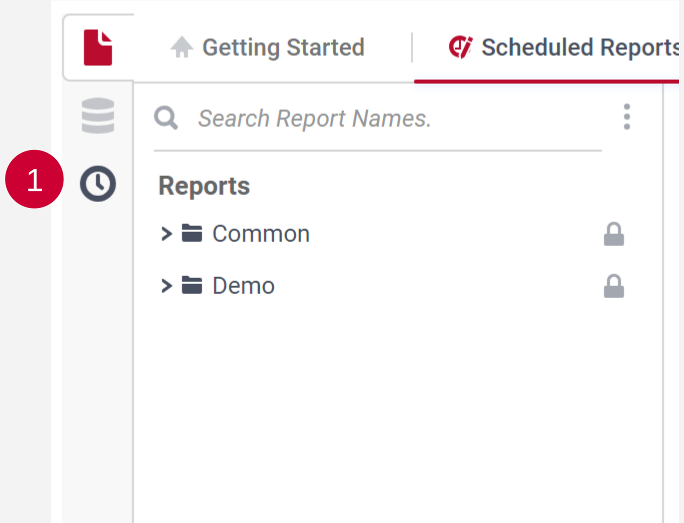
Scheduled Reports

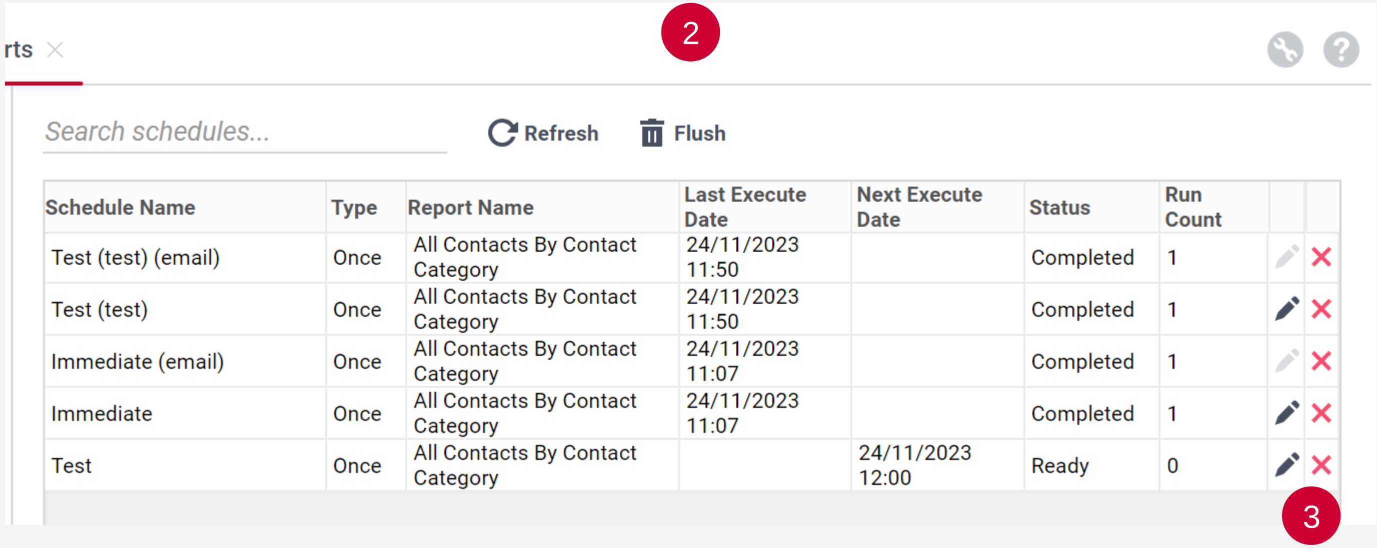
You can view Scheduled Reports by clicking the Clock icon (fig.1) in the Report Viewer.

The Scheduled Reports will display in a table (Fig.2). For each report, you can see:

- **Schedule Name**
- **Type:** How often the report will be generated
- **Report Name:** The report you chose to schedule
- **Last Execute Date**: The last time that the report was generated
- **Next Execute Date:** The next time the report is due to be generated
- **Status:** Completed if the report is no longer planned to be generated, or Ready if the report is due to be generated in the future.
- **Run Count:** How many times the report has been generated so far.

You can click the pencil icon (Fig.3) to edit this Scheduled Report or click the red X to cancel the report.





If you need any further help, please contact your dedicated Customer Success Manager or email customersuccess@tractivity.co.uk