Reports

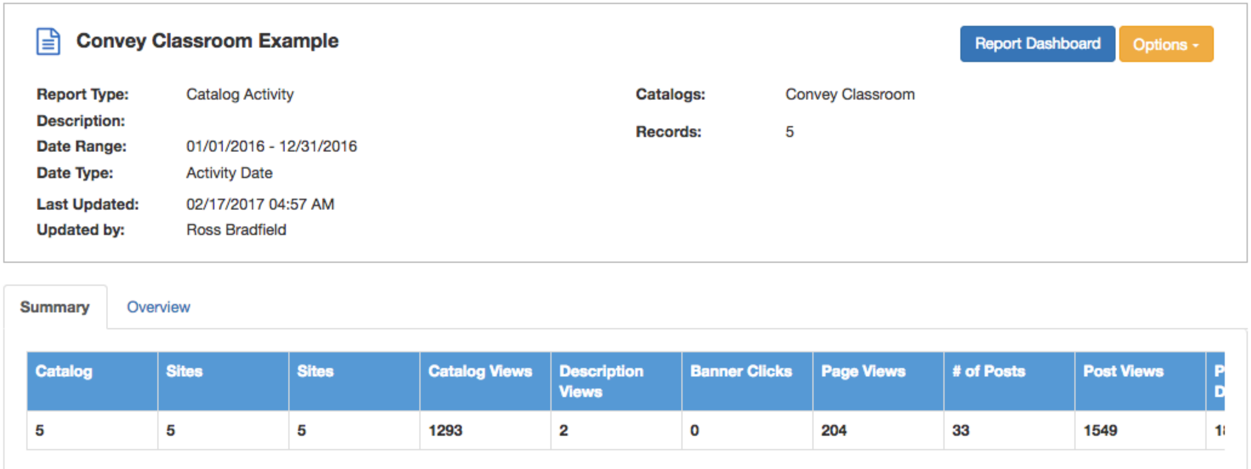
Reports allow administrators to analyze catalog, post, members or user activity, and retrieve data from administration, forms or surveys & quizzes.

Topics:

- How do I locate reports?
- How do I manage site reports?
- How do I create a new report?
- What report filters are available?
- How do I customize the fields I want in my report?
- How do I know when my report is ready to be viewed?
- What are my report options?

Reports

Reports allow a catalog administrator to analyze activity for catalogs, posts, members or users, In addition reports are used to retrieve data from administration, forms, surveys or quizzes. Each Convey site has a set of "quick reports" that can be updated or saved as a custom report. Custom reports are created inside of a wizard, saved and made available to other administrators. Reports can be viewed, downloaded or both.



QUICK TIP

Reports have a summary view, and an overview that gives more information. Many reports, such as member activity, will show more detail.

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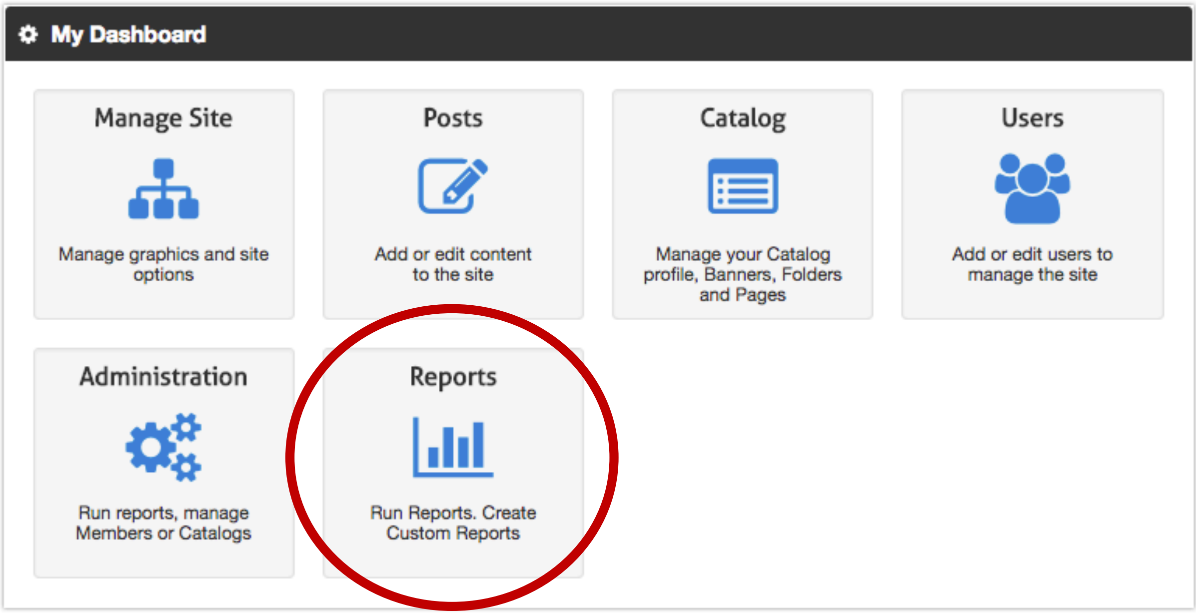
Reports

How do I locate reports?

From your Dashboard, select “Reports”. Reports are also accessible from the Administration tile.



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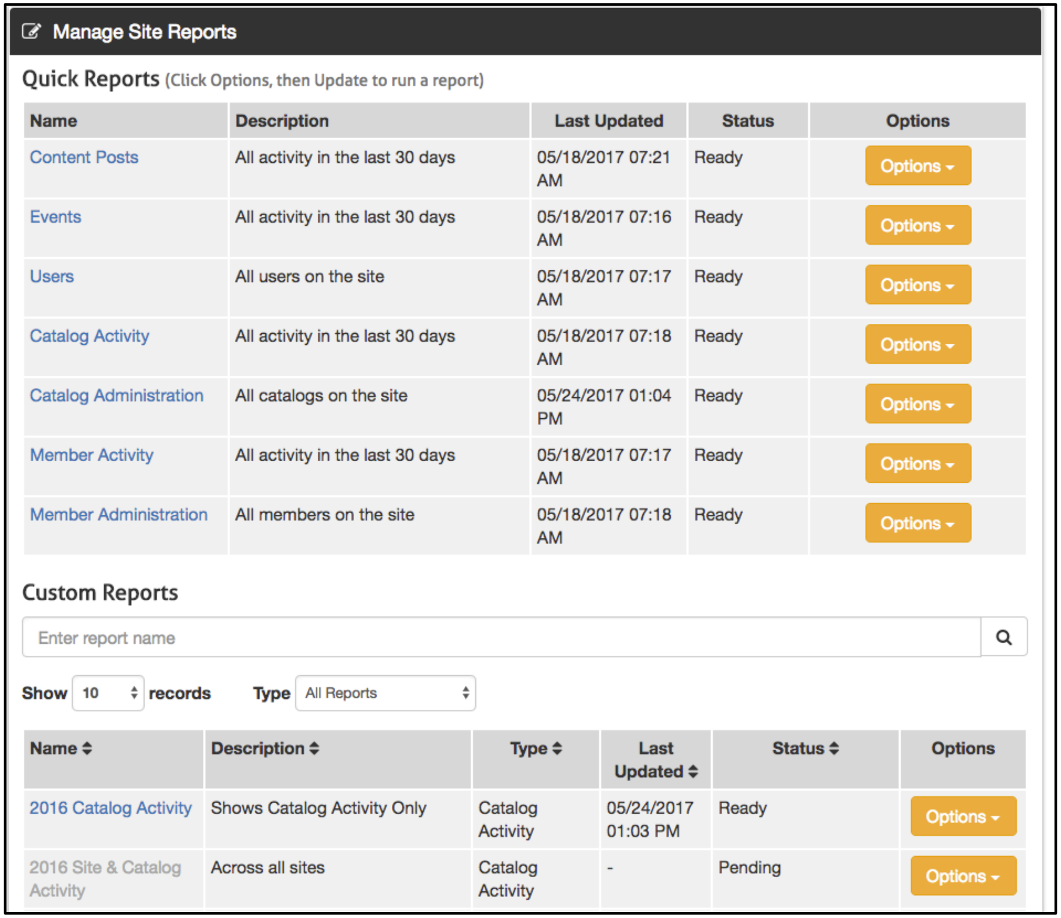
Site reports show administrative results or site activity. Site reports are divided into Quick Reports and Custom Reports. **Quick Reports** are standard reports built into the site. **Custom Reports** are ones that you create. Your options are to view the report, edit and run it again, export it, copy it or delete it. Quick Reports cannot be edited or deleted but can be updated, exported or saved as a custom report. Reports are "Ready" if they have processed or "Pending" if they are still processing. **Catalog reports** are reports created by catalog administrators and viewable by site administrators.



Manage Site Reports

Quick Reports (Click Options, then Update to run a report)

Name	Description	Last Updated	Status	Options
Content Posts	All activity in the last 30 days	05/18/2017 07:21 AM	Ready	Options
Events	All activity in the last 30 days	05/18/2017 07:16 AM	Ready	Options
Users	All users on the site	05/18/2017 07:17 AM	Ready	Options
Catalog Activity	All activity in the last 30 days	05/18/2017 07:18 AM	Ready	Options
Catalog Administration	All catalogs on the site	05/24/2017 01:04 PM	Ready	Options
Member Activity	All activity in the last 30 days	05/18/2017 07:17 AM	Ready	Options
Member Administration	All members on the site	05/18/2017 07:18 AM	Ready	Options

Custom Reports

Enter report name

Show 10 records Type All Reports

Name	Description	Type	Last Updated	Status	Options
2016 Catalog Activity	Shows Catalog Activity Only	Catalog Activity	05/24/2017 01:03 PM	Ready	Options
2016 Site & Catalog Activity	Across all sites	Catalog Activity	-	Pending	Options

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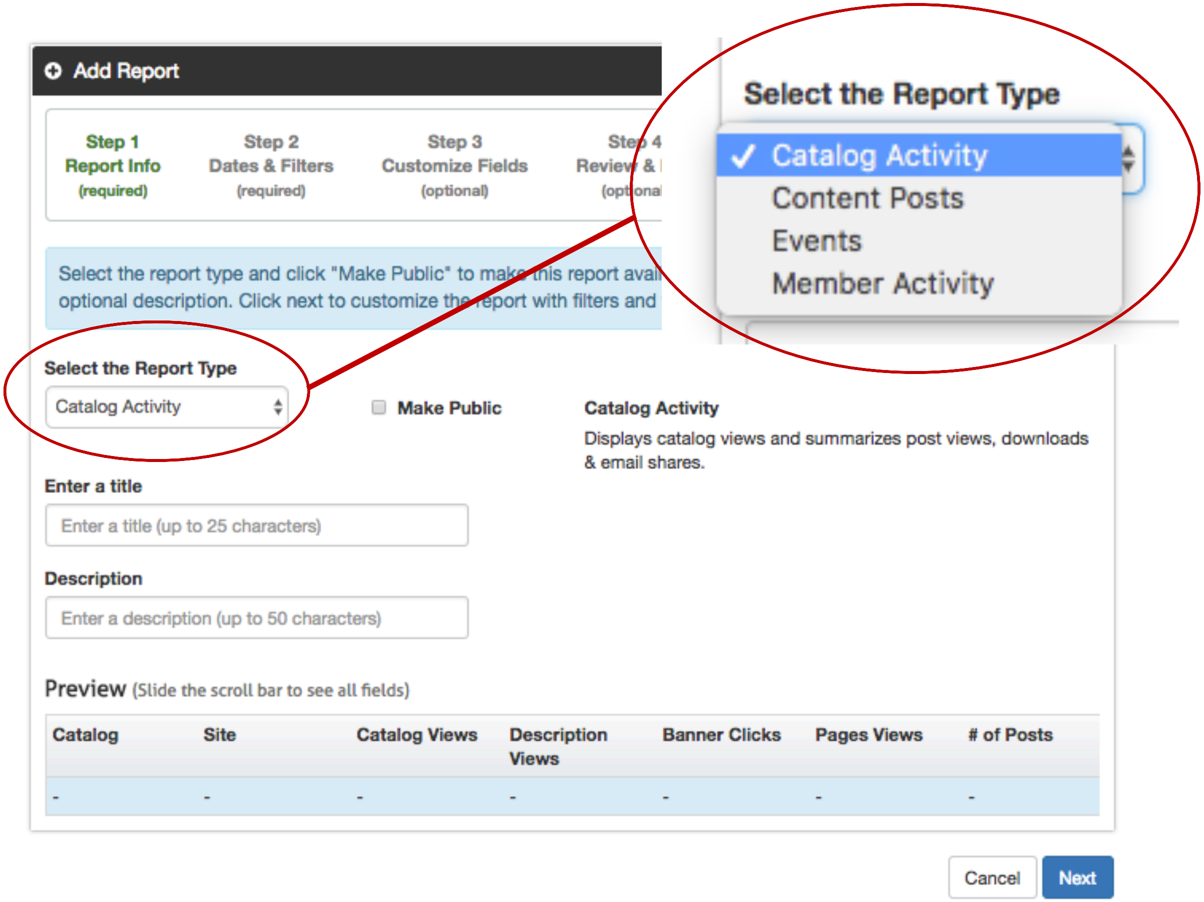
Add a New Report

To create a new report, select **"Add New Report"** from the left-side navigation. In Step 1, select the report type and mark it as public if you want others to be able to view, run or edit the report. Give the report a title and optional description. Click next to move to step 2



QUICK TIP

Select a report type to get an explanation of that type. The report wizard will allow you to add filters and customize the data.

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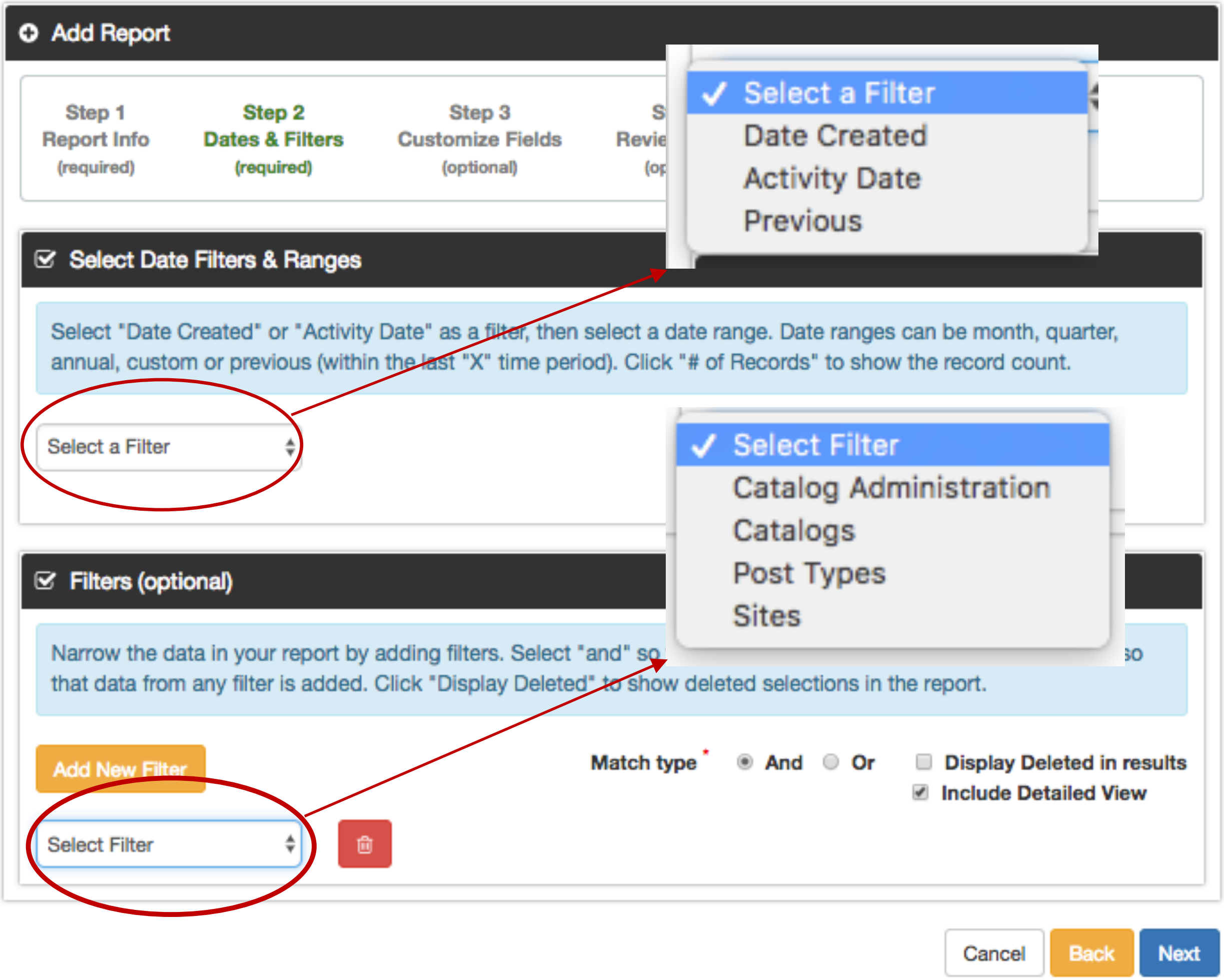
Add Report Filters

Select filters in step 2. Begin by selecting a **date filter** (required) Add additional filters by clicking the "Add New Filter" button and selecting **administrative fields** to use as filters. If you select more than one filter choose "and" or "or" to set the filter rule. If your site is connected to another Convey Site you can also filter the report by site. Catalog administrators can filter content and event reports by post type.



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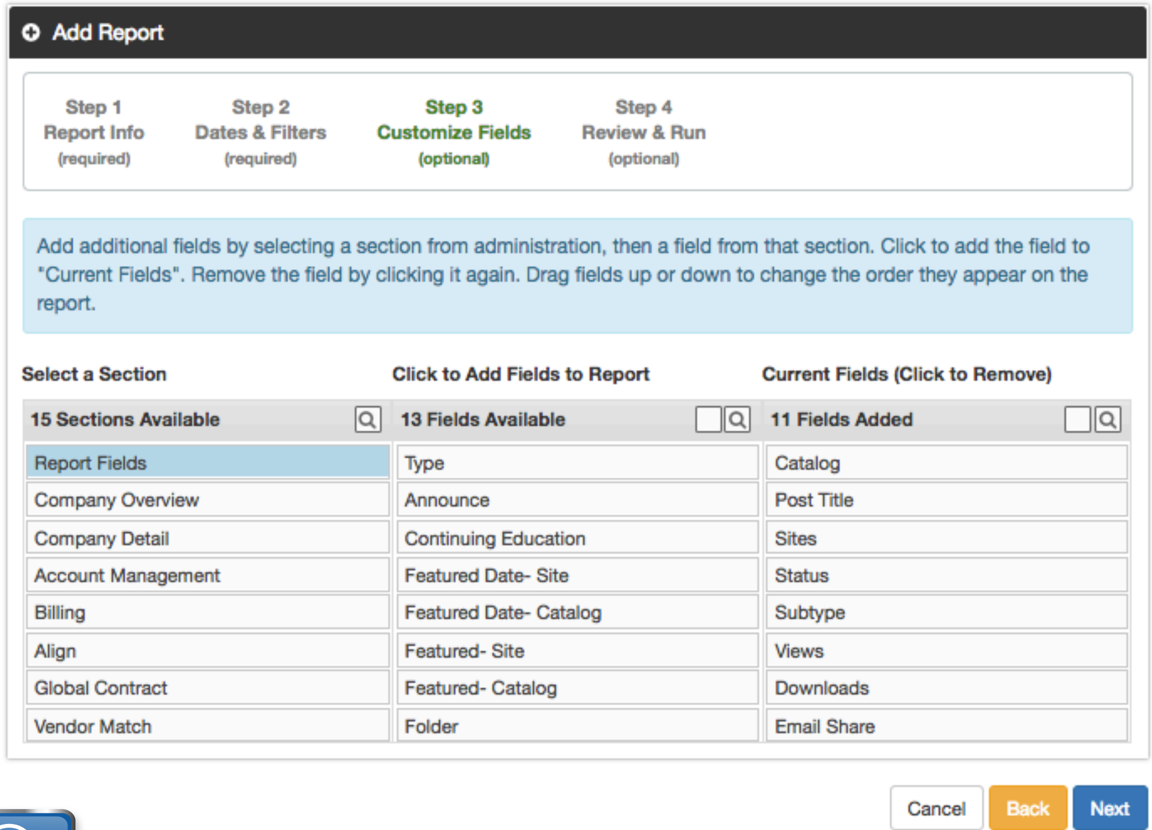
Report Fields

In Step 3, you can select the fields displayed in the report. **Select a Section** allows you to select sections from administration. The center box contains **fields** that are available from your selected sections. The **current fields** box contains fields that are currently in the report. To **add or remove fields** in the report, simply click the field in the center or right box to add or remove them from the report.



QUICK TIP

Administrative sections will change depending on the type of report you are creating.

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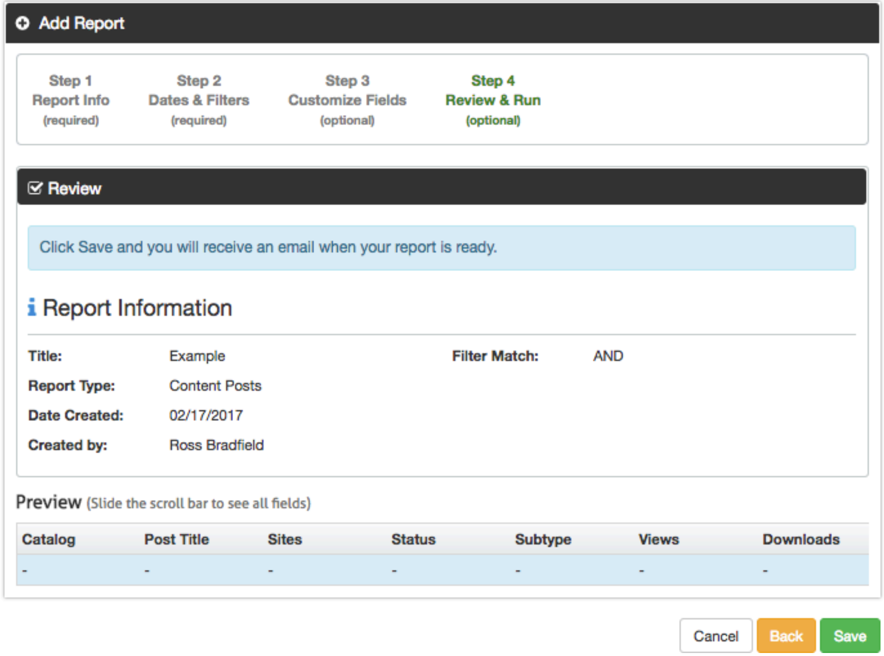
Review & Run

Review your report in Step 4 and click "Save" to finish. The system will create your report and **send you an email** when it is finished processing. Access the report from the "**Custom Reports**" table.



Report Options

Click on the name of a report and select options. You can copy the report, edit it, export it to a CSV or Excel file or print it.