

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

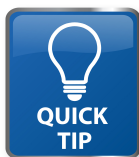
Reports allow a catalog administrator to analyze activity for catalogs, posts, members or users. In addition reports are used to retrieve data from administration, forms, surveys or quizzes. Each Convey site has a set of “quick reports” that can be updated or saved as a custom report. Custom reports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

 **Convey Classroom Example** Report Dashboard Options -

Report Type: Catalog Activity **Catalogs:** Convey Classroom
Description: **Records:** 5
Date Range: 01/01/2016 - 12/31/2016
Date Type: Activity Date
Last Updated: 02/17/2017 04:57 AM
Updated by: Ross Bradfield

Summary Overview

Catalog	Sites	Sites	Catalog Views	Description Views	Banner Clicks	Page Views	# of Posts	Post Views	P D
5	5	5	1293	2	0	204	33	1549	1i



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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Location

Manage

Report Info
Step 1

Dates &
Filters
Step 2

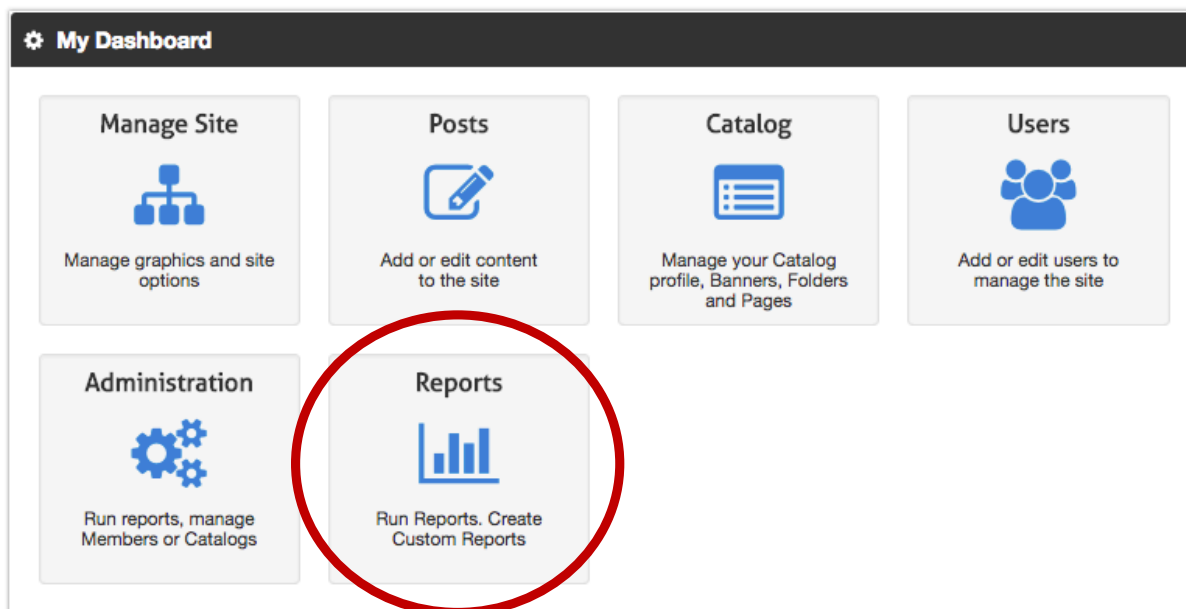
Customize
Fields
Step 3

Review &
Run
Step 4

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 records Type

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

Select the Report Type

- ✓ Catalog Activity
- Content Posts
- Events
- Member Activity

Make Public

Catalog Activity
Displays catalog views and summarizes post views, downloads & email shares.

Enter a title
Enter a title (up to 25 characters)

Description
Enter a description (up to 50 characters)

Preview (Slide the scroll bar to see all fields)

Catalog	Site	Catalog Views	Description Views	Banner Clicks	Pages Views	# of Posts
-	-	-	-	-	-	-

Cancel Next



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.

Add Report

Step 1 Report Info (required) | **Step 2 Dates & Filters (required)** | Step 3 Customize Fields (optional) | Step 4 Review & Run (optional)

Select Date Filters & Ranges

Select "Date Created" or "Activity Date" as a filter, then select a date range. Date ranges can be month, quarter, annual, custom or previous (within the last "X" time period). Click "# of Records" to show the record count.

Select a Filter

- Select a Filter
- Date Created
- Activity Date
- Previous

Filters (optional)

Narrow the data in your report by adding filters. Select "and" so that data from any filter is added. Click "Display Deleted" to show deleted selections in the report.

Add New Filter

Select Filter

Match type And Or Display Deleted in results Include Detailed View

Cancel Back Next

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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.

+ Add Report

Step 1 Report Info (required) | Step 2 Dates & Filters (required) | **Step 3 Customize Fields (optional)** | Step 4 Review & Run (optional)

Add additional fields by selecting a section from administration, then a field from that section. Click to add the field to "Current Fields". Remove the field by clicking it again. Drag fields up or down to change the order they appear on the report.

Select a Section	Click to Add Fields to Report	Current Fields (Click to Remove)
15 Sections Available <input type="text"/>	13 Fields Available <input type="text"/>	11 Fields Added <input type="text"/>
Report Fields	Type	Catalog
Company Overview	Announce	Post Title
Company Detail	Continuing Education	Sites
Account Management	Featured Date- Site	Status
Billing	Featured Date- Catalog	Subtype
Align	Featured- Site	Views
Global Contract	Featured- Catalog	Downloads
Vendor Match	Folder	Email Share

Cancel Back Next



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.

The screenshot shows the 'Add Report' interface with four steps: Step 1 Report Info (required), Step 2 Dates & Filters (required), Step 3 Customize Fields (optional), and Step 4 Review & Run (optional). The 'Review & Run' step is active. Below the steps is a 'Review' section with a message: 'Click Save and you will receive an email when your report is ready.' Underneath is 'Report Information' with fields: Title: Example, Filter Match: AND, Report Type: Content Posts, Date Created: 02/17/2017, Created by: Ross Bradfield. A 'Preview' section shows a table with columns: Catalog, Post Title, Sites, Status, Subtype, Views, Downloads. At the bottom are buttons for Cancel, Back, and Save.

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.

The screenshot shows a report card for 'Convey Classroom Example'. It includes fields for Report Type (Catalog Activity), Description, Date Range (01/01/2016 - 12/31/2016), Date Type (Activity Date), Last Updated (02/17/2017 04:57 AM), and Updated by (Ross Bradfield). It also shows Catalogs (Convey Classroom) and Records (5). An 'Options' menu is open, showing Copy, Edit, Export, and Print. Below is a 'Summary' table with columns: Catalog, Sites, Sites, Catalog Views, Description Views, Banner Clicks, Page Views, # of Posts, Post Views, and P D.

Catalog	Sites	Sites	Catalog Views	Description Views	Banner Clicks	Page Views	# of Posts	Post Views	P D
5	5	5	1293	2	0	204	33	1549	1