Reporting 2: Running Custom Reports

Speech
There are two approaches to Reporting in Sumac: 1) Use Sumac's built-in reports, or 2) Run a Custom report
This video discusses Custom reports.
Before continuing with this video, ensure that you have watched all of Sumac's Searching how-to videos. You will need to know how to effectively search for your data before you begin running custom reports.
In Sumac, running a custom reports consists of: • searching for the records of data you want to include in your report • choosing the columns of data you want to include, • sorting the report in the order you want it, and finally • exporting or printing the data.
Let's begin with a simple example. Perhaps you want to run a report that lists all your board members, their addresses, and the amount and date of each board member's last donation.
The first step in running a custom report is searching to find the data you want to include in your report. Since "board member" is often tracked as a Contact Type, we'll run this search from our Contacts list.
Choose the Search Type: Contact Type, and the Contact Type: Board.
Click Search, and Sumac presents your list of board members.
The next step in running a custom report is choosing the columns of data you want to include in the report, and sorting the data in whatever way you prefer.
To choose the columns you want to see, click the Columns icon to the right of the column titles.
That opens a new window that lists all the fields available to show in the report on the left,
And lists all the fields that are *currently* showing on the right.
In this report, we want to see our board members' first and last names, addresses, and the date and amount of each board member's last donation.
We can remove all the fields on the right that we don't wish to see in this report by selecting those fields,
And dragging and dropping them on the left.
Now we can choose all the fields we *do* want to see in this report by dragging and dropping them to the right!
Once you've chosen all the fields you want to see as columns in this report, click OK
And Sumac presents the list of board members with all the fields you selected showing as a column.
We can sort this list however we'd like by clicking the column title of the column we wish to sort by. For this example, perhaps we want this report to be sorted alphabetically by the board members' last names.

Click the Last Name column title,
And Sumac sorts the list alphabetically by last name.
Now that we've prepared the report, we have two options: export or print. Choose the best option for whatever format you want this report to be in.
If you click "Export," Sumac will save this report to a tab-delimited text file (a .txt file), which you could then open in a spreadsheet or word processor if you need to do any further editing. Or perhaps attach the report to an email in case you want to share this data with one of your colleagues.
Alternatively, if you'd like a hard-copy of this report, click Print and Sumac sends everything straight to your printer!
Now that we've got the basics down, let's try a more complex example. One common situation where a custom report is needed is when the data you want to report on is stored in a custom area of your database, like a custom add-on, or the Case Management add-on. Since that area of the database is completely customized to your organization's needs, the Sumac team cannot create any pre-built reports. You must set up your own custom reports.
For this example, we'll run a custom report from the Case Management area of the database to report on the service delivery we've provided to clients over the last month. But keep in mind that the custom, *ad hoc* reporting tools of searching, sorting and exporting or printing your data work exactly the same in every single list in Sumac.
To run your report, you must do so from the appropriate list. For our example, we'll run this report from the Case Management list.
First, we must search to find the records of data we want to include in this report. We want to report on service delivery over the last month.
We could specify a date range for this report,
Or choose a time period for this report, for example "Prior 31 days,"
And Sumac will fill in the appropriate date range for us.
Click Search
And Sumac finds all the case records that were entered in the prior 31 days.
Now that we've found the data we want to include in this report, we choose the columns of data we want to include.
You will likely have your own preferences for what columns of data you want to include in this report, but for this example, we'll include the client's name, the case manager's name, the date this took place, the program or service used, and the notes field.
Click OK
And Sumac presents the list of case records with all the fields we selected showing as a column.
You may want to sort this kind of report chronologically by date, or perhaps you want to sort by the program name to group records for similar programs together.
You may even wish to do both. For example, perhaps you want this report to be sorted by the program name, but within that, have the records sorted chronologically by date. Sumac *will* allow you to sort by two columns of data.
First click to sort this list by the date.

Now that everything has been sorted by date, click to sort the list again by Program name.

Now our report has two levels of sorting: it is primarily sorted by the Program,

But within that, it is sorted by the date.

Now that we've prepared the report, we could Export or Print it.

However, another helpful feature in Sumac is the ability to *save these custom reports*. After all, you may need to run this same report again in the future. Rather than having to set up this report every time you need it, you can save the report settings. The next time you need to run this report, and you can load the settings and Sumac instantly creates the report for you.

When you save report settings in Sumac, Sumac saves:
- all the search criteria you used for this report

- The columns of data you have chosen for this report

- And the way you've sorted this report

To save your report settings, click Save.

Sumac saves report settings as an external file.

Many Sumac users prefer to set up a folder on their server for all their Sumac report settings. For this example, we'll save these settings to the Desktop,

in a folder named "Sumac reports".

You can specify an appropriate file name for this report. Many Sumac users prefer to save their report settings using a file name that describes what the report does. For this example, we'll save these report settings as "Monthly Program report."

Click Save

And Sumac saves the report settings!

The next time you need to run this report, click "Load" and select the appropriate saved report.

Once you have created the report you need, either manually or by loading a previously-defined report, you can export or print it.

If you would like to save this report to a file, click Export.

A window appears where you can confirm all the columns of data that will be exported.

Click Export,

and Sumac asks you where you would like to save this report. Many Sumac users have a folder somewhere on their server where they save reports, but for this example, I'll save this report to my desktop.

You can use the default file name that Sumac generates for this report, or specify your own.

Click Save, and Sumac saves the report to a tab-delimted text file, which you can then open in a spreadsheet or word processing program if you need to to further editing.

You'll also notice that Sumac opened an Exporting Progress window in the bottom right corner of your screen. This window tells you when Sumac has finished exporting this report.

Alternatively, if you'd like to produce a paper copy of this report, click Print.

A window appears where you can confirm all the columns of data that will be printed, and also shows you a print layout at the bottom.
Notice the thick red line. Anything to the right of this line will not be printed.
To make your information fit on one page, narrow your columns,
increase your row heights,
or change your paper size and orientation.
When you are satisfied, click print, and Sumac sends the report to your printer.
Check out more training videos to learn more about Sumac!