



2015 Training Module 07

## Reports

Version: August 15

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## Introduction

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Milo holds a vast amount of different types of information e.g.:

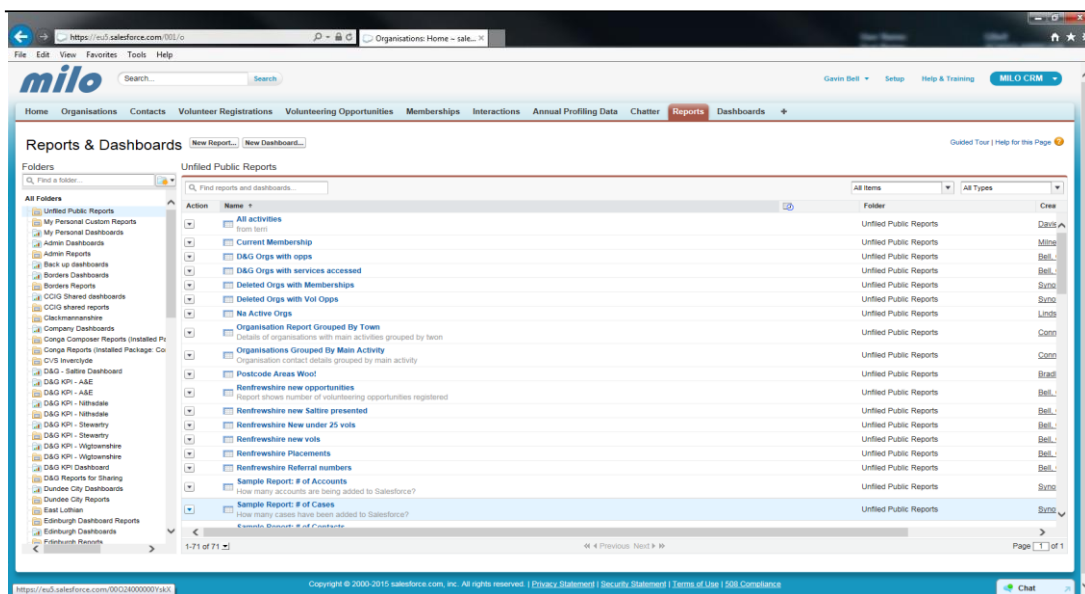
- Organisations
- Contacts
- Volunteer Opportunities
- Volunteer Registrations
- Interactions

Reporting helps you to extract the specific information that you require from the data held on Milo e.g. how many organisations are active within your TSI. This Reporting training module has been designed to provide you with the basic knowledge and understanding needed to search, view, edit and create reports, and of the basic features of reporting.

## Managing Reports in Milo

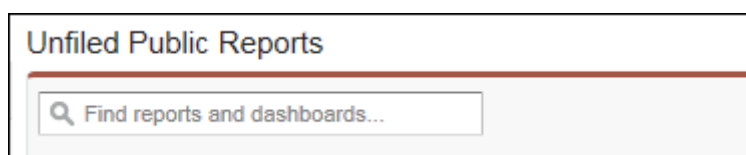
### Navigate to Reports - Home

Click on the Reports tab at the top of the screen to go to the Reports home page. By default, you will see a list of recent Reports you have accessed. By clicking on the View dropdown above the list of recent Reports, you can select 'All Reports', which will provide an alphabetised list of every Report on the system. To the left of the screen you will see your list of available Folders.



### Search for a Report

You can search for any report on the database using the Report Search box at the top of every screen.



To search for a Report, simply type the name or part of the name into the search box. Try typing 'Postcode'. You will now see any Reports with 'Postcode' in the title.

## View and edit a Report

When you click into a report, you will see the Report results view screen. Scroll down to see the data retrieved from the Report:

**Bucket Test Video**

Report Generation Status: Note: 2,000 of 7,074 records are displayed below. Select Export Details for a complete view of your data.

Report Options:

Summarize information by: Age Groups Show: All volunteer registrations Time Frame: Ambassador Certificate Presented Date Range: Custom

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

Filtered By: Edit  
Age greater than 0 Clear

Grouped By: Age Groups  
Sorted By: Age Groups

Volunteer Registration: Ref	Age
Age Groups: Younger than 16 (829 records)	
V-155097	7
V-157746	16
V-157842	15
V-157843	16
V-157876	16
V-158302	15
V-158331	15
V-158332	16
V-158966	15
V-158973	16
V-158975	15
V-159024	15
V-193678	16
V-197549	14
V-197660	15
V-198371	15
V-199016	14

Report Options are displayed at the top of the screen. This is where you can choose to **summarize information, what data is shown, Date Field, Run the Report, Hide report Details, Customize report, Save, Delete, Print, Export or Subscribe.**

Report Options:

Summarize information by: Age Groups Show: All volunteer registrations Time Frame: Ambassador Certificate Presented Date Range: Custom

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

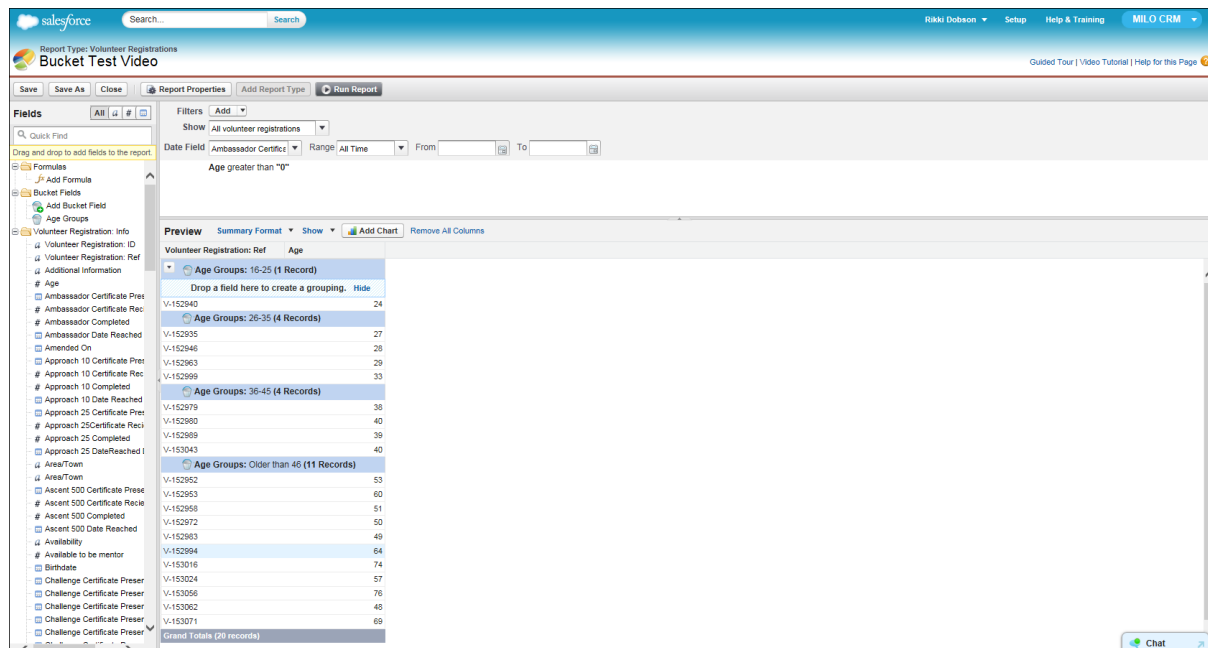
To make changes to a report, click on the **Customize** button.

Summarize information by: Age Groups Show: All volunteer registrations

Run Report Hide Details Customize Save Save As Delete

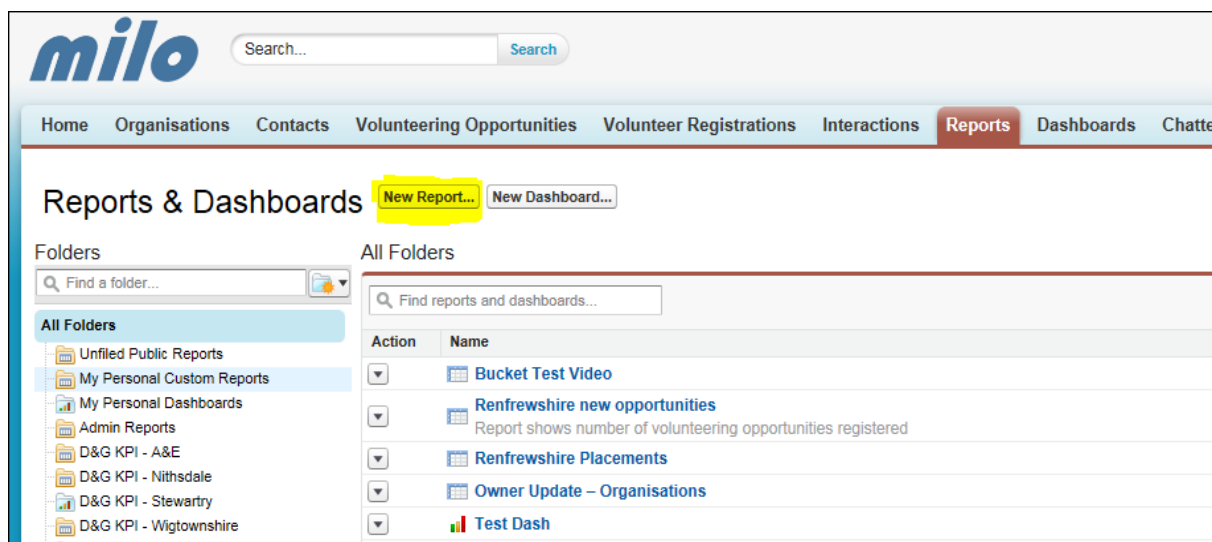
Filtered By: Edit  
Age greater than 0 Clear

The page will open in the customize view, allowing you to update and change any fields letting you extract different data sets with the altered report.

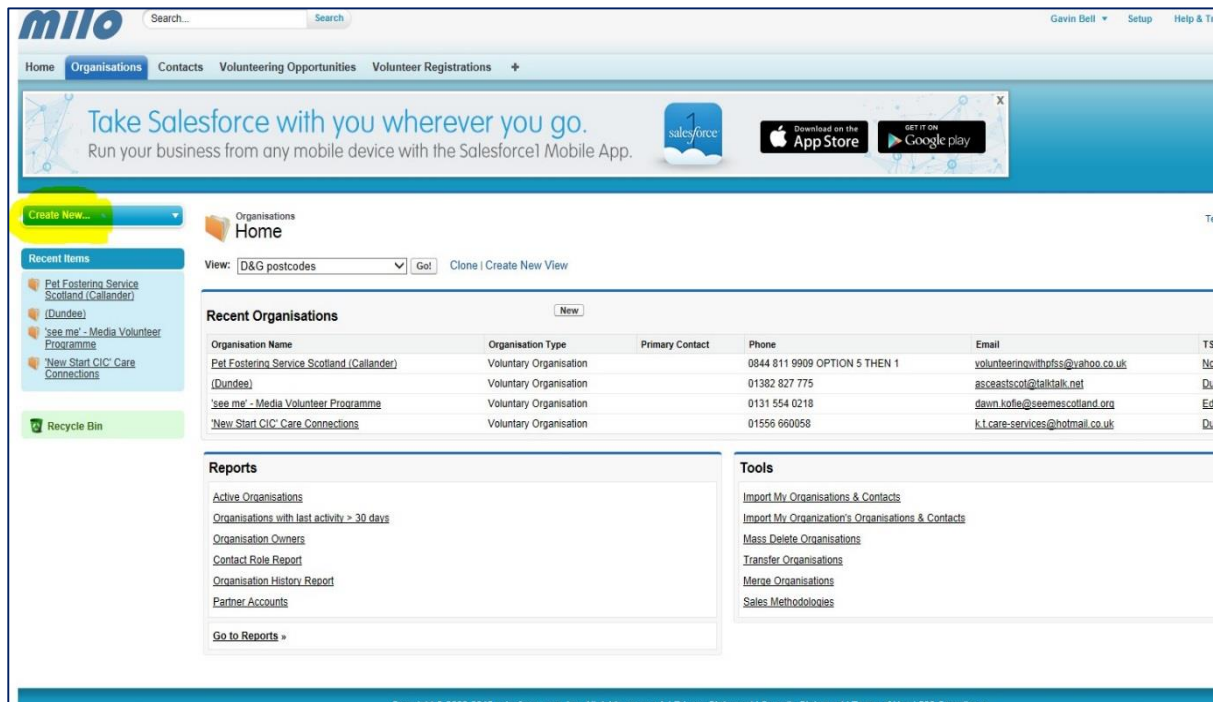


## Create a new report

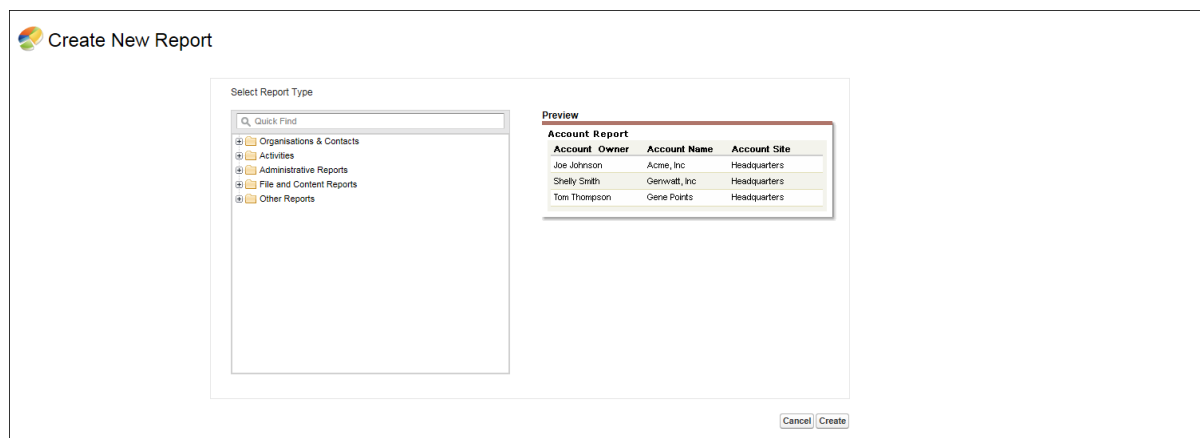
There are two ways to create a new record, you can click the **New Report** button at the top of the **Reports** page:



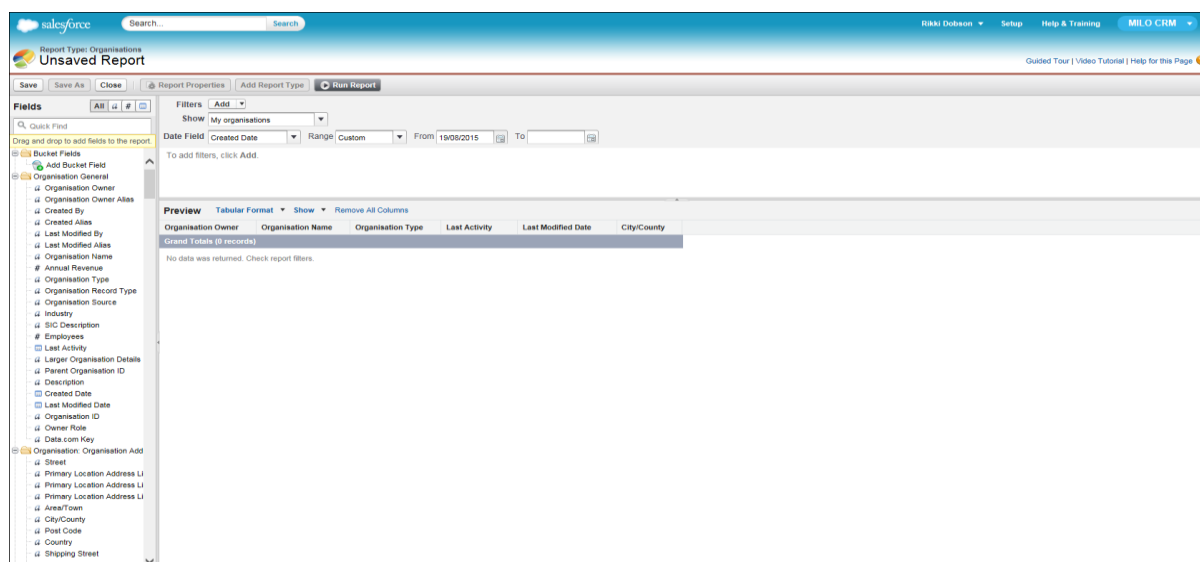
Alternatively, you can click the **Create New...** at the left hand side of the page. Then click on **Report**.



You will now see the Create new report page which allows you select a report type. Click **Create** at the bottom of the screen.

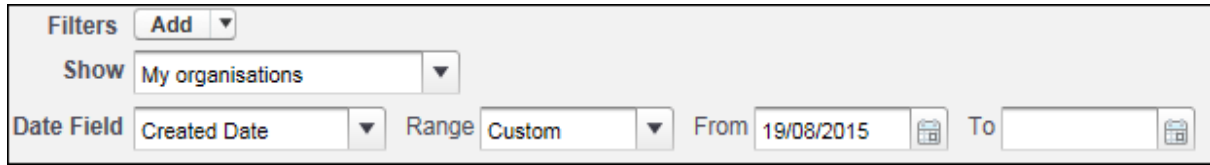


You will now be presented with the **Unsaved Report** screen.



### Basic features of Reports.

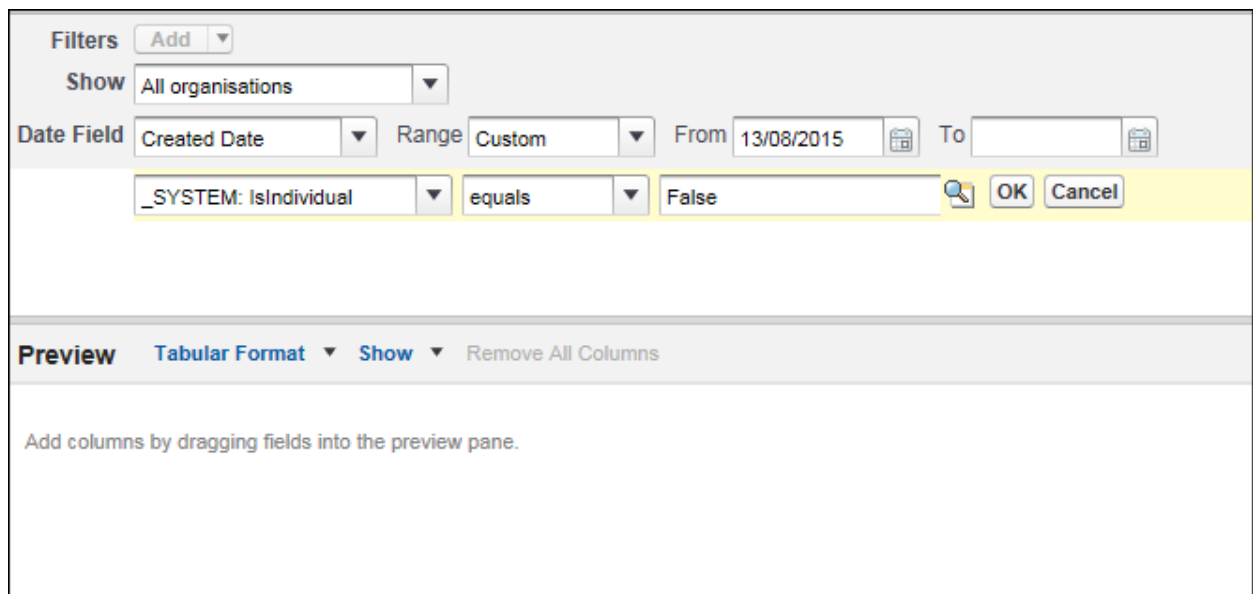
You can now begin adding fields to reports, but there is a couple of important things to make note of beforehand. The first thing is the **Show** and **Date Field** field at the top of the screen.



This screenshot shows the top configuration area of a Salesforce report. It includes a 'Filters' section with an 'Add' button. Below it is a 'Show' dropdown menu currently set to 'My organisations'. Further down is a 'Date Field' section with a dropdown set to 'Created Date', a 'Range' dropdown set to 'Custom', and date pickers for 'From' (19/08/2015) and 'To'.

By default these are set to '**My Organisations**' and a **Custom** date. This can cause some confusion when creating new reports. Leaving the **Show** field as '**My Organisations**' will only show the organisations that you own, setting it to '**All**' will show all organisations on Milo (depending on your user privileges). Just make sure you set these fields accordingly, depending on the reports specific needs.

The second thing is when creating a report with Organisation Data, you will need the '**\_System: Individual**' filter.

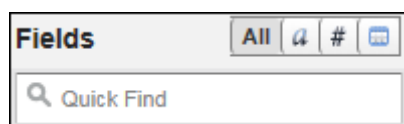
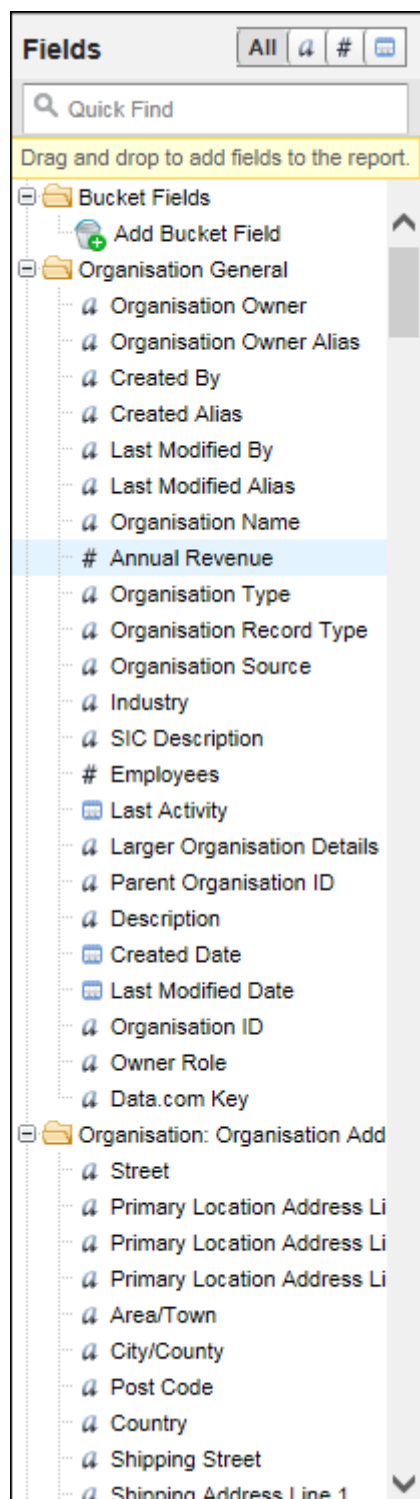


This screenshot shows the full report builder interface. The top section is identical to the previous one, but the 'Show' dropdown is now set to 'All organisations'. Below the date fields, a new filter row is added and highlighted in yellow: '\_SYSTEM: IsIndividual' equals 'False'. At the bottom, there is a 'Preview' section with a 'Tabular Format' dropdown, a 'Show' button, and a 'Remove All Columns' link. Below this is a large empty area with the text 'Add columns by dragging fields into the preview pane.'

With the way Salesforce works, when creating a Contact it also creates an organisation page for the contact. The filter '**\_System: Individual**' filters out those people organisations.



Thirdly, the Left hand side of the screen has the list of available fields that can be used for the report. This list will change depending on the type of report you choose at the start, in the Create new report page.



You can filter down the available fields by **All**, **Text** field, **Numerical** field or **Date** field. You can also use the **Quick Find** feature to find a specific field. To add fields, you can either double click them and they will appear in the report or you can click and drag them.

Once you have added everything you require for your report, simply click **Run Report** at the top of the page.

The screenshot shows the Salesforce 'Unsaved Report' interface. At the top, there's a search bar and a 'Run Report' button highlighted in yellow. Below the header, there are tabs for 'Save', 'Save As', 'Close', 'Report Properties', 'Add Report Type', and 'Run Report'. The main area is divided into 'Fields' on the left and 'Filters' on the right. The 'Fields' list includes various organizational fields like 'Organisation Owner', 'Created By', 'Last Modified By', 'Organisation Name', 'Annual Revenue', 'Organisation Type', 'Organisation Record Type', 'Organisation Source', 'Industry', 'SIC Description', 'Employees', 'Last Activity', 'Larger Organisation Details', 'Parent Organisation ID', 'Description', 'Created Date', 'Last Modified Date', 'Organisation ID', 'Owner Role', 'Data.com Key', 'Organisation: Organisation Add', 'Street', and 'Primary Location Address'. The 'Filters' section shows a 'Date Field' set to 'Created Date' with a 'Range' of 'Custom' and a date range from '13/08/2015' to an empty 'To' field. A filter expression is shown: '\_SYSTEM: IsIndividual equals "False"'. Below the filters, there's a 'Preview' section with a table showing 'Owner TSI' and 'Created Date' for various organizations.

Owner TSI	Created Date
East Lothian	13/08/2015
East Lothian	13/08/2015
South Ayrshire	13/08/2015
Dumfries and Galloway	13/08/2015
North Lanarkshire	13/08/2015
South Ayrshire	13/08/2015
Aberdeenshire	13/08/2015
West Lothian	13/08/2015
Moray	13/08/2015
West Lothian	13/08/2015
Clackmannanshire	13/08/2015
Moray	13/08/2015
Moray	13/08/2015
Highland	13/08/2015
Highland	13/08/2015
East Ayrshire	13/08/2015
Highland	13/08/2015

Once you have run the report, you will be presented with the report data. Here you can save the report, go back in and customize the report or export it e.g. to Excel.

The screenshot shows the 'Organisation List Report' results page. At the top, there's a header 'Organisation List Report' and a 'Report Generation Status: Complete' message. Below this, there are 'Report Options' including 'Summarize information by:' (set to '--None--') and 'Show' (set to 'All organisations'). There's also a 'Time Frame' section with 'Date Field' set to 'Created Date', 'Range' set to 'Custom', and a date range from '13/08/2015' to an empty 'To' field. Below the options, there are buttons for 'Run Report', 'Hide Details', 'Customize', 'Save As', 'Printable View', and 'Export Details'. A filter expression is shown: '\_SYSTEM: IsIndividual equals False'. Below the filter, there's a table showing 'Owner TSI' and 'Created Date' for various organizations.

Owner TSI	Created Date
Aberdeenshire	15/08/2015
Aberdeenshire	14/08/2015
Aberdeenshire	18/08/2015
Aberdeenshire	17/08/2015
Aberdeenshire	13/08/2015
Aberdeen City	18/08/2015
Aberdeen City	14/08/2015
Aberdeen City	14/08/2015
Edinburgh City	17/08/2015
Edinburgh City	20/08/2015
Edinburgh City	17/08/2015

## Summary

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In this **Reports** module, we have covered:

- Navigating to Reports
- Searching for a Report
- Viewing and editing Reports
- Creating a new Report
- Various Basic features of Reports

These skills will help you to extract the specific information that you require from the data held on Milo. You can advance these skills by experimenting with this great feature that Milo offers.

Remember – for more step by step advice, see the individual training modules. If you have any problems or get stuck, you can contact the Milo team at [milosupport@scvo.org.uk](mailto:milosupport@scvo.org.uk)