Reports Module

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# Reports List

**Functional Description**

This view displays standard and custom reports.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Report Name | Link |  |  |
| Module | Text | Options include:   1. Contacts 2. Campaigns 3. Forms 4. Automation 5. Analytics & Reports |  |
| Last Run | Text | Date last run by the User |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Run | Icon | Associated with a record |  |
| Edit | Icon | Associated with a record  Applies to custom reports |  |
| Copy | Icon | Associated with a record  Applies to custom reports |  |
| Delete | Icon | Associated with a record  Applies to custom reports | Alert: “You’re about to delete 1 report. Are you sure you want to delete 1 report?”  Buttons: “Delete Report” and “Cancel” |
| All Reports | Link | Filters grid |  |
| Smart Reports | Link | Filters grid |  |
| Custom Reports | Link | Filters grid |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Create Report | Link |  |

**Exceptions**

None

**Notes and Issues**

None

# Create/Edit Custom Report

**Functional Description**

This view allows the User to create a new custom report or edit an existing custom report.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Report Name\* | Textbox & Text | Field displays as a textbox until a value is entered and saved  Default value to “Untitled Report ([date])”  Example: Untitled Report (1/1/2014)  May be modified inline  Once saved, the value is displayed as text |  |
| **Segment** | | | |
| Search\* | Dropdown | Initial option includes:   1. Contacts |  |
| Field\* | Dropdown | Options include fields associated with the option selected |  |
| Field Qualifier\* | Dropdown | Options may include:   1. Contains 2. Does not contain 3. Is 4. Is not 5. Is empty 6. Is not empty 7. Is equal to 8. Is not equal to 9. Is greater than 10. Is greater than or equal to 11. Is less than 12. Is less than or equal to   Exact options are dependent upon the Field selected |  |
| Search Value\* | Depends upon Selection | The type of input depends upon the Field selected |  |
| Group Qualifier | Dropdown | Options include:   1. And 2. Or |  |
| **View** | | | |
| Display Columns\* | Dropdown | Options include fields associated with the option selected |  |
| Group [object] by | Dropdown | Options include fields selected in Display Columns |  |
| Summary Calculations | Dropdown | Applies to fields selected in Display Columns and those fields that can be calculated (average, median, or sum) |  |
| **Preview** | | | |
| Results | Grid | Select and display the first ten results as defined by the configured Segment and View |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Add Condition | Link | Adds another conditional line item |  |
| Delete Condition | Link | Deletes selected conditional line item |  |
| Add Conditional Group | Link | Adds a group for conditions |  |
| Delete Conditional Group | Link | Deletes selected conditional group |  |
| Add another grouping | Link | Adds another option to grouping dropdown |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Save Report | Link |  |
| Run Report | Link |  |

**Exceptions**

None

**Notes and Issues**

None

# View Custom Report

**Functional Description**

This view allows the User to view a new or existing custom report.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Report Name\* | Textbox & Text | Field displays as a textbox until a value is entered and saved  Default value to “Untitled Report ([date])”  Example: Untitled Report (1/1/2014)  May be modified inline  Once saved, the value is displayed as text |  |
| **Segment (accordion)** | | | |
| Search | Text |  |  |
| Field | Text |  |  |
| Field Qualifier | Text |  |  |
| Search Value | Text |  |  |
| Group Qualifier | Text |  |  |
| **View (accordion)** | | | |
| Display Columns | Text | Options include fields associated with the option selected |  |
| Group [object] by | Text | Options include fields selected in Display Columns |  |
| Calculations | Text | Applies to fields selected in Display Columns and those fields that can be calculated (average, median, or sum) |  |
| **Results** | | | |
| Results | Grid | Select and display the first ten results as defined by the configured Segment and View |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Edit Segment | Icon |  |  |
| Edit View | Icon |  |  |
| Cancel | Button | If in Edit mode |  |
| Save Report | Button | If in Edit mode  Refreshes results view |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Save Report | Link | If in Edit Mode |
| Save Report As | Link |  |
| Delete Report | Link |  |

**Exceptions**

None

**Notes and Issues**

None