# Report Module

## Basics

See the SAR-Hub Basics document for help on logging in, navigating to the Agency and Member detail pages, as well the common editing wizards found on many pages.  This and other documents are available on the https://www.sar-hub.com/about page.

## Report Module

SAR-Hub's report module lets you configure a customized report and then download it as a spreadsheet (Comma Separated Value, .CSV file).  You can choose which fields to include, whether to count, sum or average those included fields, how to sort the rows and which rows should be included.

The reports can be run against the following sources:

- Member data, including:
  - Name
  - Email Address (all in one field)
  - Standard member fields (status, category, Id)
  - Custom fields
  - Qualification history (all of one member's entries in one field)
  - Telephone numbers (all in one field) or separate  by mobile, work, home, other
  - Addresses (all address data in one field
  - Emergency Contact info (all in one field)

- Qualification History (one entry per row)
  - Name
  - Email Address (all in one field)
  - Standard member fields (status, category, Id)
  - Qualification History entry

- Addresses (one address per row)
  - Name
  - Email Address (all in one field)
  - Standard member fields (status, category, Id)
  - Address, City, State, Zip

- Event Attendance
  - Name
  - Email Address (all in one field)
  - Standard member fields (status, category, Id)
  - Event detail (name, type, date, attendee hours, points, miles)]

- Attendance Summary
  - Name
  - Email Address (all in one field)
  - Standard member fields (status, category, Id)
  - Attendance summary for each member by Event Type (and all types), attendance year, attendee hours, points, miles
  - Attendance summary for the Agency by Event Type (and all types), for hours, points
  - Percentage for the member hours, points within the Agency

- Date Alerts
  - Name
  - Email Address (all in one field)
  - Standard member fields (status, category, Id)
  - Date alert detail including the date field, date of the alert, the date value, days set for the alert, and whether to email the admin or the member

- Personal Activity Report
  - Type (Event or Activity)
  - Agency
  - Event Type, Name Date, Location, Note
  - Member Points, Hours, Miles

## Report Security

Report specifications can be created and modified by a member of the agency that is in the "Report Admin" Admin Group.  See SAR-Hub Security

Reports can generally be run by any member of the agency whose security level meets the criteria of the most secure print, sort or select field in a report.  For example, if the admin chooses to include Birth Date in the custom fields, and sets the security level to "Member and Admin" and includes the Birth Date in a report, only admins will be able to run that report.

A special case is the "Activity Report" that appears on the My Profile page.  That report can only be edited and run by the member on their own data.  Another is the ID Card Lookup report which has public access.

## Running a Report

Open the report specification. This can be done from a variety of links throughout SAR-Hub.

- Activity Report on the My Profile page
- Various types of reports from the "Reports" dropdown menu on the Agency Detail page
- The Event Attendance and Attendance Summary Reports are also available from the "Events/Attendance" page



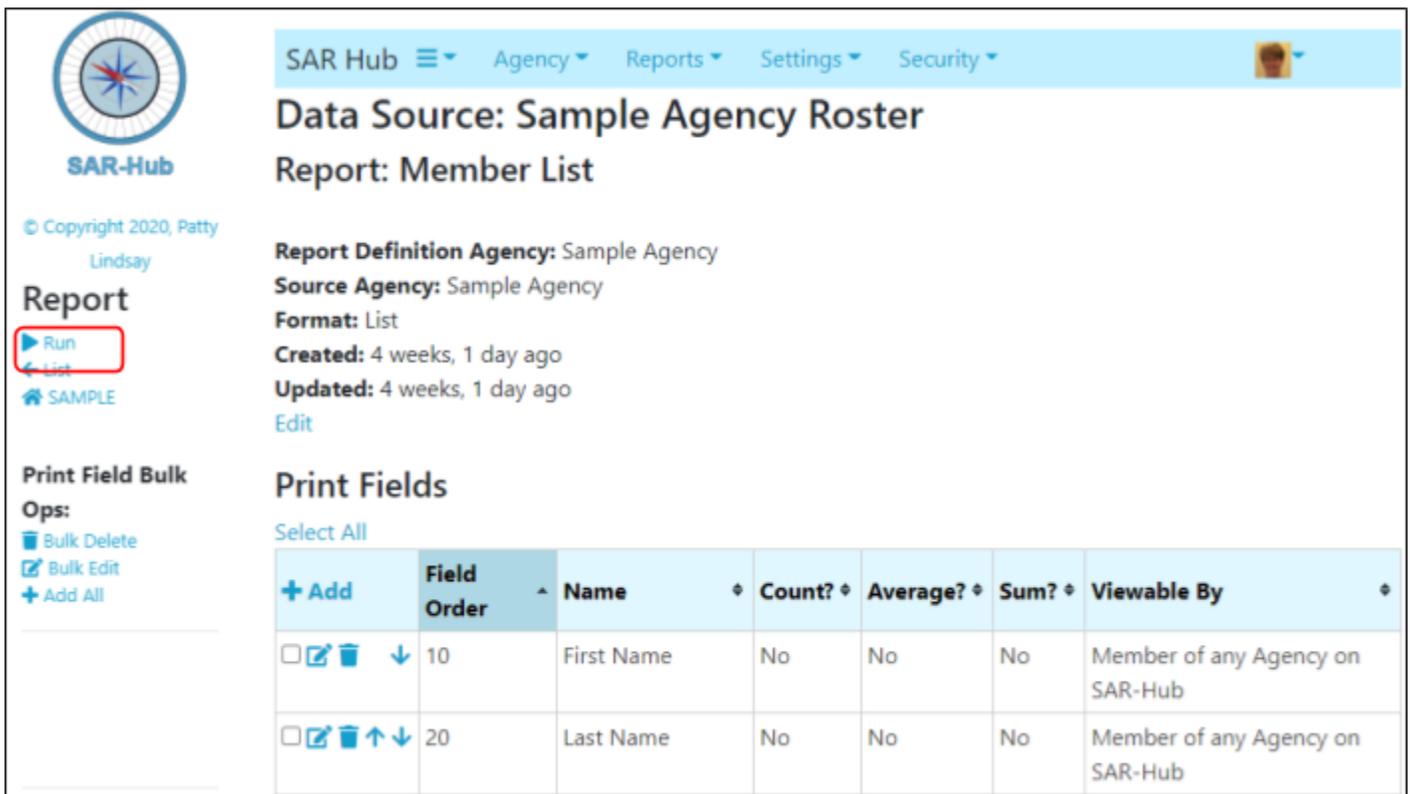Each of the above links will open a list of reports specifications. The example below is the Member Reports:

Click on the name of the report to open the Report Definition.



Click the run button to run the report.

You may be prompted for some run parameters such as a date range. The report may take a few seconds to run.

## Source: Sample Agency Roster
## Report: Member List

C Please Wait..   Cancel
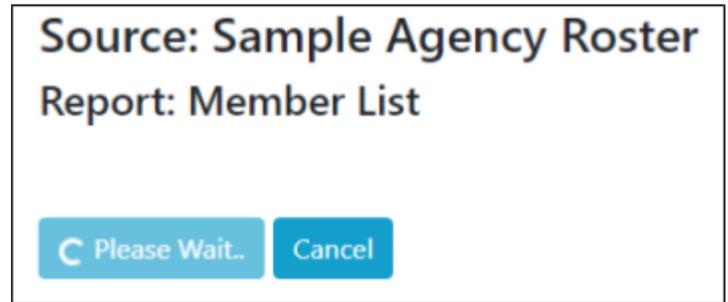
The report file should appear in the left corner of the bottom bar of the browser (depending on your browser).

Member_List.csv   ∧
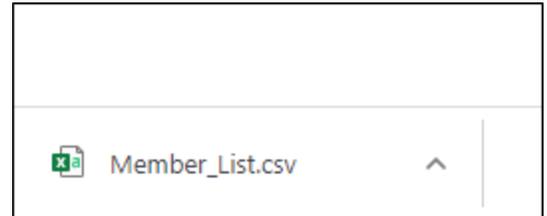
Click on the filename to open it.  Typically the file will open in Excel, this could vary depending on your computer's configuration.

| | A | B | C | D | E | F | G |
|---|---|---|---|---|---|---|---|
| 1 | First Name | Last Name | Email Address | Member Status | Member Category | Member Id | Telephone Numbers |
| 2 | Minnie | Admin | minnie.admin@wvmarg.org | Active | Ground | 101 | 555-123-4689(m), 555-123-4567(w) |
| 3 | Jane | Doe | jane.doe@wvmarg.org | Active | Canine Handler | 102 | 555-323-4689(m) |
| 4 | Bob | Johnson | bob.johnson@wvmarg.org | Prospective | Trainee | | 555-555-4689(m) |
| 5 | John | Smith | john.smith@wvmarg.org | Inactive | Canine Handler | 103 | 555-444-4689(m), 555-666-2345(h) |
| 6 | | | | | | | |

Adjust the spreadsheet by formatting the text, changing the column widths and wrapping text as needed.

## Building a Report Specification

Report specifications that have just the copy button beside it indicate a report that you can run but not change. If you would like to make changes to, click the clone button and make your own copy which you can then edit.



Click the "Add" button to create a new report specification.
Click the edit button (pencil)  to change the name or format ("List" vs "Page") of the report.
Click the name of the report to change the specification.

The Format option indicates whether the report should be formatted as a list (most common) or if each row should be on a Page by itself.  The List option generates a CSV (comma separated variable) spreadsheet that can be opened in a spreadsheet program like Microsoft Excel.  The Page option generates a RTF (rich text format) document that can be opened in a word processor like Microsoft Word. The Page option is useful when wanting to print all of the details for a member, and each member should be on a separate page. See Appendix A for an example of a report formatted as a page.

## Changing the Report Specification

The Print Fields section configures which fields are to be included in the output, and whether to count, average or sum them.  The average and sum are only available for Integer and Decimal fields.

You can use the checkboxes and the Bulk Delete or Bulk Edit buttons to apply the same action to multiple print fields at once.

Use the "Add All" button to add all of the available fields to the Print Fields. This action won't duplicate fields.

**Print Field Bulk Ops:**
- Bulk Delete
- Bulk Edit
- Add All

**Print Fields**

Select All

| Add | Field Order | Name |
|---|---|---|
| ☑ ✎ 🗑 ↓ | 10 | Event Type |
| ☑ ✎ 🗑 ↑ ↓ | 20 | Event Name |

The Sort Fields section configures which fields the output should be sorted on. The Sort Order specifies the precedence of the sort field. In the example, the output is sorted by First Name within Last Name, both in Ascending order.

**Sort Fields**

| Add | Sort Order | Name | Ascending? |
|---|---|---|---|
| ✎ 🗑 ↓ | 10 | Last Name | True |
| ✎ 🗑 ↑ | 20 | First Name | True |

The Select Fields determine which rows are to be included in the output. A row has to meet the criteria of all of the select fields to be included.

**Select Fields**

| Add | Field | Condition | Operator | Value | Run Time |
|---|---|---|---|---|---|
| ✎ 🗑 | Event Date | is | between | '2000-01-01', '2099-12-31' | Yes |
| ✎ 🗑 | Member Category | is | one of | 'Canine Handler', 'Ground' | No |

The "Condition" option indicates whether the criteria should be true or not to be included.

"Operator" can be one of:
- One of - the field must contain a value in the specified list
- Between - the field must be between (inclusive) of two specified values
- Greater than or equal to, greater than, less than or equal to, less than, or equal - the field is compared to one value

"Run Time" indicates whether the user should be prompted for the value when the report is run. This option is particularly useful for selections based on dates. Some users may be able to run a report, but not edit it the specification, so this option gives them the ability to specify a date range when they run the report.

If you need to change the operator of a Select Field that's been created, and the edit screen doesn't give you the option to select a new operator, you will need to delete the Select Field and add it again.

## Appendix A - Sample of Member Report Formatted as "Page"

```
        First Name: Minnie
         Last Name: Admin
     Email Address: minnie@sample.org
     Member Status: Active
   Member Category: Ground
         Member Id: 101
 Telephone Numbers: 555-123-4689(m),
                    555-123-4567(w)

           Address:
 Emergency Contact:
     Qualification  Work Telephone: 555-123-4567
           History: Mobile Telephone: 555-123-4689
                    IS-100
                    IS-200
                    SARTECH Level: SARTECH-I
                    2012-06-01: SARTECH-II Date
                    2015-07-01: SARTECH-II Recert
                    Date
                    2017-11-01: SARTECH-I Date
                    2020-06-01: Basket-weaving
                    class at Somewhere College
                    2020-11-01: SARTECH
                    Expiration Date
                    2020-12-03: Dispatch class
  Mobile Telephone: 555-123-4689
    Home Telephone:
    Work Telephone: 555-123-4567
   Other Telephone:
       Date Joined: 2000-09-01
   Membership Valid  2020-12-31
        Thru Date:
  Background Check   2010-08-01
             Date:
  Position(s) Held:
 CPR AED Expiration  2022-06-01
             Date:
        First Aid    2022-06-01
   Expiration Date:
   Wilderness First
 Aid Expiration Date:
            IS-100: True
            IS-200: True
            IS-700: True
            IS-800: True
            ICS-300: True
            ICS-400: True
     SARTECH Level: SARTECH-I
 SARTECH Expiration  2020-11-01
             Date:
```