

# How Do I... Add A Campaign Filter To My Report?

## Problem

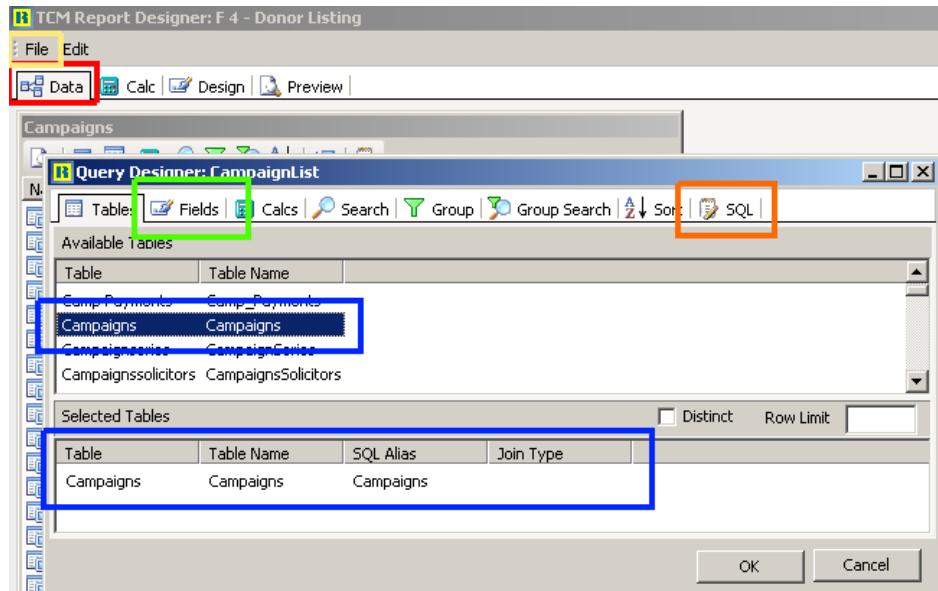
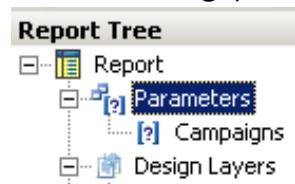
Many of the standard TCM reports have filter popups. The filters require the user to enter the desired value exactly right; improper spelling will prevent the campaign from being found.

## Solution

With advanced options in ReportBuilder, the designer allows the user to select one or more values required for the report without having to type in the value manually.

## Process

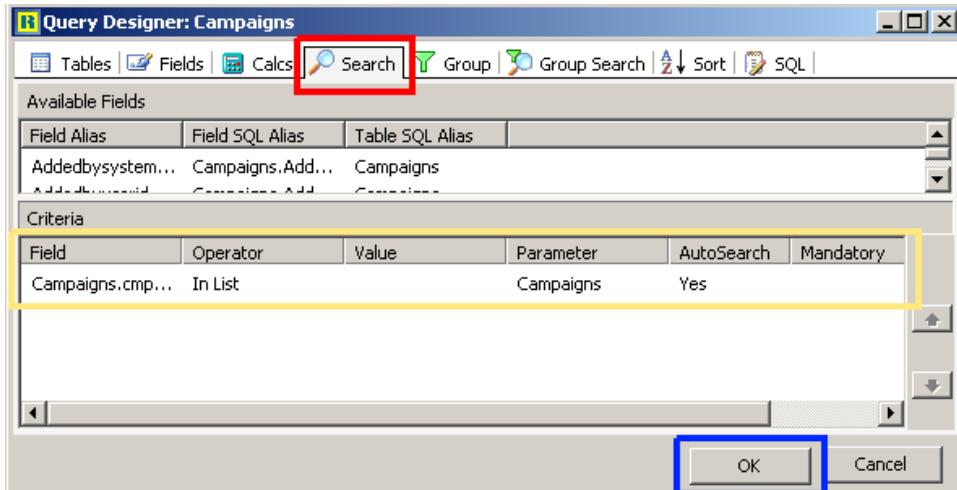
1. Open your report for editing in TCM (Right click on the report and choose **Design**)
  - a. For this example, “F 4-Donor Listing” will be used.
2. Go to **File → Save As** and give it a new name. This will prevent any accidental loss of the standard reports.
3. On the Report Tree, create a new parameter by right clicking and choosing **New**. Name the parameter *Campaigns*.
4. Click on the Data tab [RED] and then **File → New...** [YELLOW]. Finally, choose **Query Designer** and click **OK**.



5. Select (double click to the bottom list) *Campaigns* as a Table. [BLUE]
6. On the Fields tab [GREEN], select *Cmp Name*.
7. On the SQL tab [ORANGE], enter *CampaignList* as the new name for the query and click **OK**.



# How Do I...



8. On the original Query called *Campaigns*, click on the “magnifying glass.” [RED]
9. Configure the *Campaign Name* filter that already shows on the Search tab. This is the current popup that asks the user to enter a Campaign Name. The new configuration should follow the settings below. [YELLOW]
  - a. Change *Operator* to *In List*.
  - b. Set *Parameter* to the new *Campaigns* parameter created in Step #3.
  - c. *AutoSearch* should remain checked.
  - d. *Mandatory* and *Show All* are “opposites,” only one can be selected at a time.
    - i. When *Mandatory* is checked, the user will be required to select at least one Campaign.
    - ii. When *Show All* is checked, the user can select Campaigns but is also able to leave it set to select all Campaigns.

In this report, the Search Criteria was already present, in other cases, a new entry can be added by selecting the field from the top.

10. Click **OK** to finish. [BLUE] Click on the Design tab at the top of the screen to return to the report design.
11. On the report tree, select the parameter created in Step #3.
12. Configure the settings as shown in the *Report Tree*.
  - a. The entries in the *LookupSettings* [RED] will configure the drop down to pull from the *CampaignList* query.
  - b. The entries in the [YELLOW] and [BLUE] need to be adjusted as well.
13. Save your report and now when the report is run a popup shows similar to below.

