

How Do I...

Add A Campaign Filter To My Report?

Problem

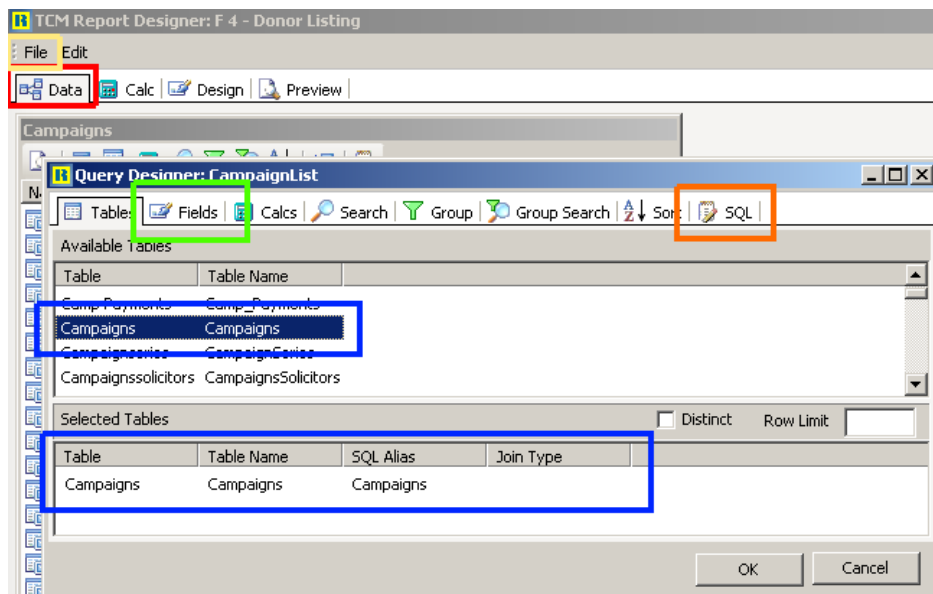
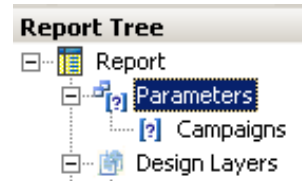
Many of the standard TCM reports have filter popups. The filters require the user to enter the desired value exactly right; improper spelling will prevent the campaign from being found.

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

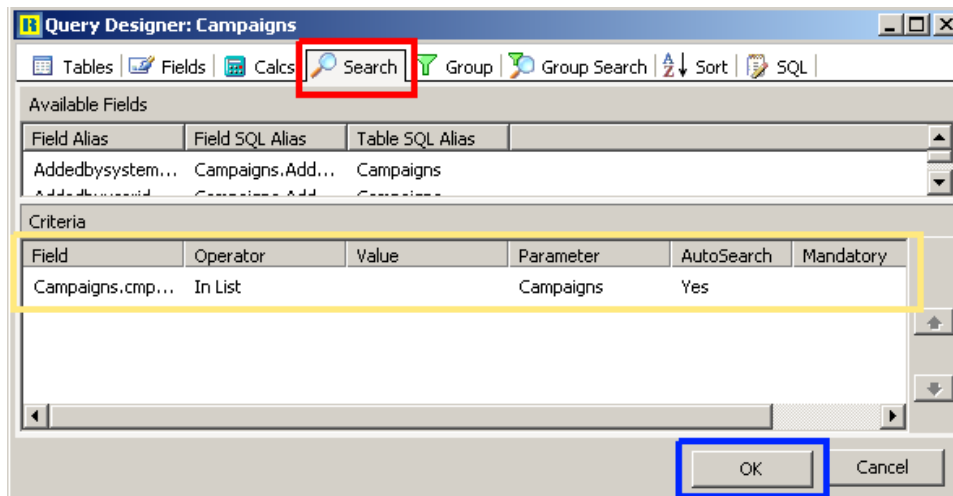
1. Open your report for editing in TCM (Right click on the report and choose **Design**)
 - a. For this example, "F 4-Donor Listing" will be used.
2. Go to **File** → **Save As** and give it a new name. This will prevent any accidental loss of the standard reports.
3. On the Report Tree, create a new 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**.



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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.

