# 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

- Open your report for editing in TCM (Right click on the report and choose **Design**)

   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.
- Report Tree Report Parameters (?) Campaigns Campaigns Design Layers
- 3. On the Report Tree, create a new parameter by right clicking and choosing **New**. Name the parameter *Campaigns*.
- Click on the Data tab [RED] and then File → New... [YELLOW]. Finally, choose Query Designer and click OK.

R TCM Report Designer: F 4 - Donor Listing											
i File Edit											
🖙 Data 🖬 Calc   🖅 Design   🔔 Preview											
R Query Designer: CampaignList											
4	Table	Table Name				<u> </u>					
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	Table	Table Name	SQL Alias	Join Type							
	Campaigns	Campaigns	Campaigns								
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- 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...

R Query Designer: Campaigns									
🔲 Tables 🖾 Fields 🔚 Calcs 🔎 Search 🍸 Group 🦻 Group Search 🗍 Sort 🕼 SQL									
Available Fields									
Field Alias	Field SQL Alias	Table SQL Alias			▲				
Addedbysystem	Campaigns.Add	Campaigns			<b>•</b>				
Criteria									
Field	Operator	Value	Parameter	AutoSearch	Mandatory				
Campaigns.cmp	In List		Campaigns	Yes					
					+				
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				ок	Cancel				

- 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.

Directed Gifts     Directed Gifts     Directed Gifts     Head Discovery Center     Misc Gifts     Rubin Program Fund     Smith Memorial Fund	Annual Appeal 2011 Annual Appeal 2012	_ □ ×
		Cancel



