



ACTIVENet Insights user guide
(v5.67)

Version	Date
5.67	Jan 12, 2022



ACTIVE Network, LLC

© 2022 Active Network, LLC, and/or its affiliates and licensors. All rights reserved. No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any computer language, in any form or by any means, electronic, mechanical, magnetic, optical, chemical, manual, or otherwise, without prior written permission. You have limited permission to make hard copy or other reproductions of any machine-readable documentation for your own use, provided that each such reproduction shall carry this copyright notice. No other rights under copyright are granted without prior written permission. The document is not intended for production and is furnished "as is" without warranty of any kind. All warranties on this document are hereby disclaimed including the warranties of merchantability and fitness for a particular purpose.

ACTIVE Network, LLC
Dallas Corporate Office
5800 Granite Parkway - 12th Floor
Plano, Texas 75201

About ACTIVE Network, LLC

ACTIVE Network, LLC is a technology and media company that helps millions of people find and register for things to do and helps organizations increase participation in their activities and events.

For more information about ACTIVE Network, LLC products and services, please visit ACTIVEnetwork.com.

If you have any questions about this document, please contact the ACTIVE Net Support team using the information below.

Phone: 1-800-663-4991

Email: activenetsupport@activenetwork.com

Website: <http://support.activenetwork.com/activenet>

Table of contents

Overview	4
Signing in and out of ACTIVENet Insights	5
Access control requirement	6
Folders structure.....	7
ACTIVENet Insights pages	9
Overall layout.....	9
Top menu bar	9
Homepage	10
Interactive reporting	11
Overall layout.....	11
Running a report	13
Using input controls/parameters.....	14
Using interactive reports.....	17
Saving or exporting a report	29
Scheduling a report.....	31
Ad Hoc reporting.....	38
Overall layout.....	38
Creating an ad hoc view.....	41
Opening an existing ad hoc view	43
Saving an ad hoc view.....	44
Saving an ad hoc view and creating a report	44
Exporting an ad hoc view.....	45
Creating an ad hoc report from an existing ad hoc view.....	46
Scheduling an ad hoc view.....	47
Saving or exporting a report	48
Frequently Asked Questions.....	50

Overview

ACTIVENet now includes a new interactive reporting portal called ACTIVENet Insights, where you can run standard reports and modify them to match your own preferences. You can customize these reports by formatting, filtering, and sorting data in individual report columns. You can then save your customizations so that you can easily view them again in the future.

In addition to customizing how report data displays, you can use ACTIVE Net Insights to easily view the customers and transactions that make up the totals in your reports. Reports in this environment load more quickly and they easily export in raw format for a spreadsheet.

Note: Please use the Chrome browser to view ACTIVENet Insights. Microsoft Internet Explorer and Microsoft Edge Browsers are not supported.

Signing in and out of ACTIVENet Insights

To sign in to ACTIVENet Insights:



- In ACTIVE Net, go to **Reports > ACTIVE Net Insights**. You will be automatically signed in to ACTIVE Net Insights.

To sign out of ACTIVE Net Insights:

- In the top right of the ACTIVE Net Insights page, click **Log Out**.

Access control requirement

The new access security system for ACTIVENet Insights consists of Global Permission and Category Level Permission.



Global Permission

Before you can sign in to ACTIVE Net Insights, your ACTIVE Net user account must have the new **Reports: ACTIVE Net Insights** system user profile function option.

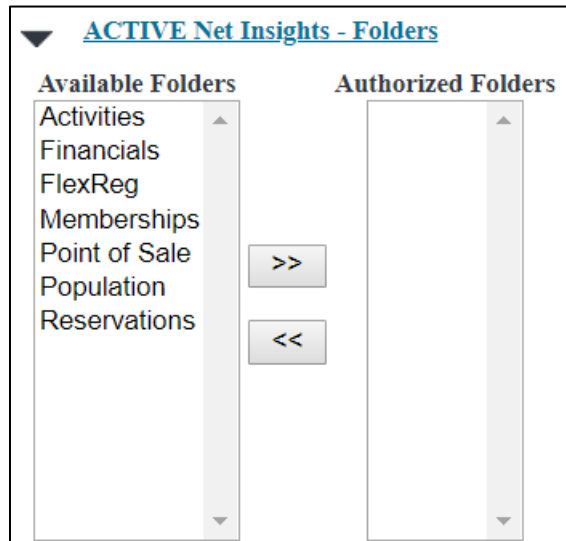
Note: The **Reports: ACTIVE Net Insights** permission allows access to reporting for *all* sites in ACTIVE Net Insights. Do not assign this permission to any site-specific users who are not already permitted to run multi-site reports in ACTIVENet.

1. Go to **Administration > System Settings > System User Profiles**.
2. Select the system user profile that you want to modify.
3. Choose one of **the** following:
 - If you want users to be able to save changes and customizations that they make to reports in ACTIVENet Insights and to create report schedules:
 - a. In the **Function Options** section, highlight the **Reports: ACTIVE Net Insights** option.
 - b. Move this option to the **Full Access** list.
 - If you want user to be able to sign in to ACTIVENet Insights and run reports there but you do not want them to be able to save new reports:
 - a. In the **Function Options** section, highlight the **Reports: ACTIVE Net Insights** option.
 - b. Move this option to the **Read Only Access** list.
4. Click **Save**.

Category Level Permission

System users with Category Level Permission can view corresponding public folders in ACTIVENet Insights.

Location: **Administration Home > System Settings > System User Profiles**

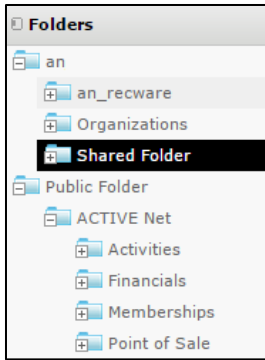


To create or modify a system user profile and assign the folders, execute the following steps.

1. Go to **Administration > System Settings > System User Profiles**.
2. Create a new profile or select the system user profile that you want to modify. Make sure the **Reports: ACTIVE Net Insights** permission is **Full Access** or **Read Only Access**.
3. Under the **ACTIVE Net Insights - Folders** section, multi-select the required folder(s) from the **Available Folders** box and click the **>>** button to add public folders to the **Authorized Folders** box.
4. Click **Save**.

Folders structure

ACTIVENet Insights consists of Public folder and Saved Content folder.



Public Folder

System users with Category Level Permission can view corresponding public folders in ACTIVENet Insights.

Saved content Folder

Saved content Folders consists of Personal folder and Shared folder.

Note:

- **Organization folder** – it is a public folder that contains temporary system files.
- **Personal folder** – Personal folder is automatically created when a user with **Reports: ACTIVE Net Insights** permission as full access logs into ACTIVENet Insights for the first time and the user can edit, save and delete content to the personal folder.

Note: Users with Read Only permission do not have a personal folder.

- **Shared folder** – Shared folder is a public folder for all the users in the organization.

Users with **Reports: ACTIVE Net Insights** permission as full access can save the reports to the Shared folder and save reports from the Shared folder to their Personal folder.

ACTIVENet Administrator users who have access to ACTIVENet Insights can delete the content in the Shared folder and save content to other user's personal folder.

ACTIVENet Insights pages

Overall layout

ACTIVENet Insights reporting platform contains the following areas:

- **Top menu bar** – It includes navigation options, help and login.
- **Report area**
 - For interactive reporting layout, see [Overall layout](#).
 - For ad hoc reporting layout, see [Overall layout](#).

Top menu bar

The menu bar at the top of ACTIVENet Insights includes the following elements:

- **Home** – Go to the **Home** page.
- **View**
 - Go to **View > Repository** to browse for reports by category.
 - Go to **View > Messages** to view the messages from the ACTIVENet insights.
- **Create**
 - Go to **Create > Ad hoc view** to create an ad hoc view using domains.
 - Go to **Create > Report** to create a report using templates.

Homepage

The homepage includes the following elements:

- **Announcements** – what's new in Insights
- **Learning Resources** – how-to documents
- **Recently Viewed Items** – recently viewed reports and views

Home

ACTIVE Net | Insights

Announcements
February 2, 2016

ACTIVE Net Insights New and Updated Reports In 2015 we launched ACTIVE Net Insights, our new business intelligence portal for operational reporting. In 2016 we will continue to add new reports and make improvements to make it even easier to gain the data insights you need to make key business decisions.

Learning Resources

ANET Insights Help

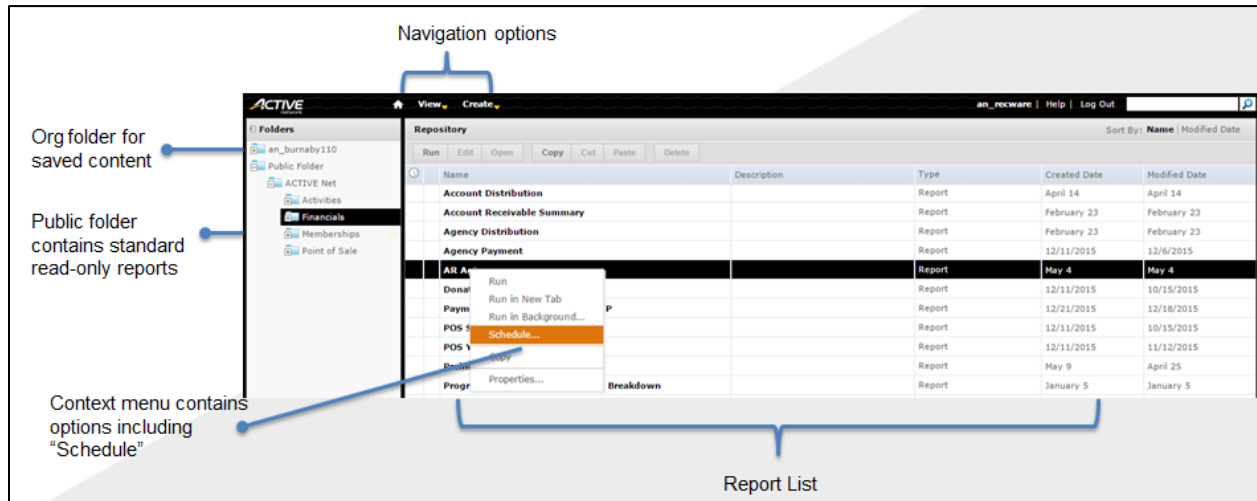
Recently Viewed Items

You have no recently viewed items

Interactive reporting

Overall layout

Repository page

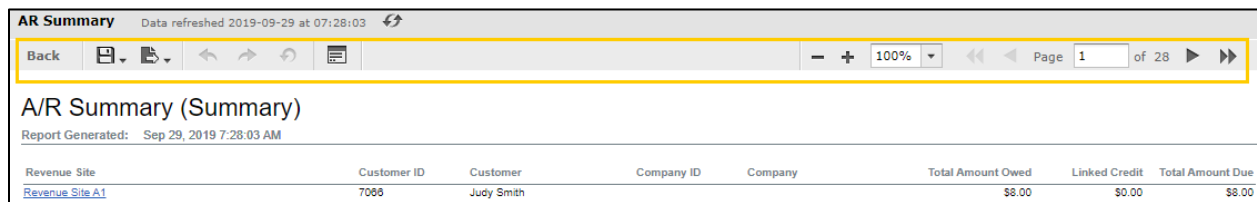


To see the **Repository** page, go to **View** > **Repository** on the top menu bar.

The **Repository** page displays your organization’s reports within the folders that are used to organize them. You can use the folder tree on the left side of the page to browse your reports by category. Use the **Repository** page to browse your reports when you know the type or category of report that you want to run.

Once you have selected a category on the left site of the page, click the name of a report in the main part of the page to run that report.








Report page



To see the report page, run any report in ACTIVE Net Insights.

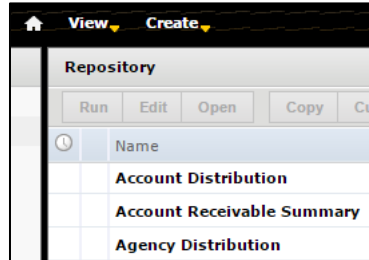
The report page includes the following elements:

- **Refresh** – Refresh the report with the latest data.

- **Back**  – Click **Back** to go back to whatever page you ran this report from.
- **Save**  – Save the customizations you have made to a new report so that you can easily access them again in the future.
Note: If your ACTIVENet user account does not have **Full Access** to the **Reports: ACTIVE Net Insights** system user profile function option, then you cannot save report customizations.
- **Export**  – Export the data in this report to a file that you can open in an external application.
- **Undo/redo controls**  – Undo your most recent report action, or redo an action you have just undone.
- **Options**  – Modify this report's input controls so that you can change the filters being used to narrow down report data.
- **Page controls**  – Enter a page number or use the navigation buttons to go to a specific page in the report.
Note: Page controls only display if your report spans multiple pages.
- **Zoom controls**  – Use the +/- buttons or the dropdown list to specify how large you want the report to display on the page.

Running a report

To run a report:



1. On the **Repository** page, click the name of the report that you want to run.
2. In the **Input Controls** window, enter any dates or other filters that you want to use to narrow down the data in the report.
3. Click **OK**.
4. The report output appears.


Using input controls/parameters

To run a report, click the report name. An **Input Controls** window appears where you can filter the data to appear in the report.

Each interactive report enables users to explore maximum 13 months of data across all applicable sites through a simple and intuitive web browser interface.

To run reports without time limitation, use Ad hoc report to build robust reports and export to various formats for deeper data exploration and mining.

To enter input controls:

1. In the **Input Controls** window, if a date range is required, in the **Start Range** and **End Range** fields either click the  icon to select a date or enter a date offset expression.

The date offset expression is applied to the current date and consists of a period +/- count:

Assume today is Aug 4, 2015 then:

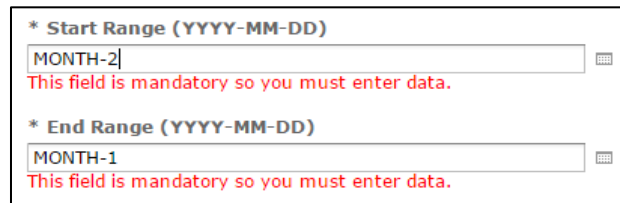
Day+1 = Aug 5, 2015

Week-1 = July 26 (Week starts on Sunday.)

Month-2 = June 1, 2015 (First day of June)

Quarter-1 = April 1, 2015 (First day of the second quarter)

Year-3 = Jan 1, 2012 (First day of 2015)



The screenshot shows two input fields. The first is labeled '* Start Range (YYYY-MM-DD)' and contains the text 'MONTH-2'. Below it is a red error message: 'This field is mandatory so you must enter data.' The second field is labeled '* End Range (YYYY-MM-DD)' and contains the text 'MONTH-1'. Below it is also a red error message: 'This field is mandatory so you must enter data.'

If you enter **Start Range** and **End Range** like the screenshot above, the time range is June.

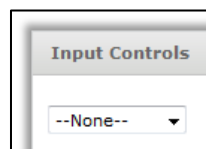
2. In the **Input Controls** window, specify any other necessary filters that you want to use in your report.

Note: If you do not want to narrow down a particular filter, then click **All** for that filter. For example, if the **Input Controls** window includes a **Site** filter and you do not want to filter the report to only show a specific site, then click **All**.

Choose one of the following:

- To run the report using the filters you have selected and leave the **Input Controls** window open so that you can make further modifications once the data displays, click **Apply**.
- To run the report using the filters you have selected and close the **Input Controls** window for now, click **OK**.
- To remove any filters that you have entered and return the **Input Controls** window to its default state, click **Reset**.
- To close the **Input Controls** window without running the report, click **Cancel**.


The dropdown list at the top left of the **Input Controls** window only displays if you have saved a set of input controls in the past. To use input controls that have been previously saved:



1. In the **Input Controls** window, select a saved set of filters from the list at the top left of the window.

2. Make any necessary modifications to the saved filters.
3. Click **OK**.

To change the input controls for a report after you have already run it:

- Click the  **Input Controls** button at the top right of the page.

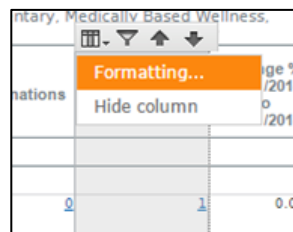
Using interactive reports

Formatting columns

To format a column:

ations	Total Members on 10/01/2014	CH 09
0	1	
0	2	
0	67	
0	70	

1. Click any column to highlight it.



2. At the top of the column, hover over the first button.
3. Click **Formatting**.

Format column: Account Name Basic Formatting Conditional Formatting

Apply to:

Heading text:

Font: Size:

Style: Color:

Extension fonts:

Alignment:

< Previous Column Next Column > OK Cancel

The **Format column** window appears.

Apply to:

- Headings
- Headings**
- Detail Rows
- Totals

- In the **Format** column window, select the part of the column that you want to modify in the **Apply to** list.

Font: SansSerif

Size: 10

Style: **B** *I* U

Color:  

Extension fonts

- DejaVu Sans
- DejaVu Sans Mono
- DejaVu Serif
- Monospaced
- SansSerif**

5

6

7

8

9

10

Alignment:   

- Specify any formatting information that you want to apply to this part of the column.

Format pattern: #,##0,###;(#,##0,###)

Number format: % , ←.0 .00 →.0

Currency: \$ € ¥ £

- 1234
- 1234-
- (1234)
- (-1234)

- If the part of the column that you want to format includes numbers, select a **Format pattern** to use as a template when formatting these numbers.
- Click **OK**.

Conditional formatting

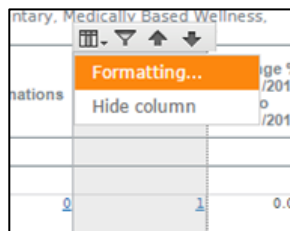
You can format the numbers in a column in different ways depending on the value of those numbers. Use conditional formatting if you want to call attention to specific values in your columns.

For example: If you want to call attention to memberships that have more than 50 members, then you can highlight numbers greater than 50 in red.

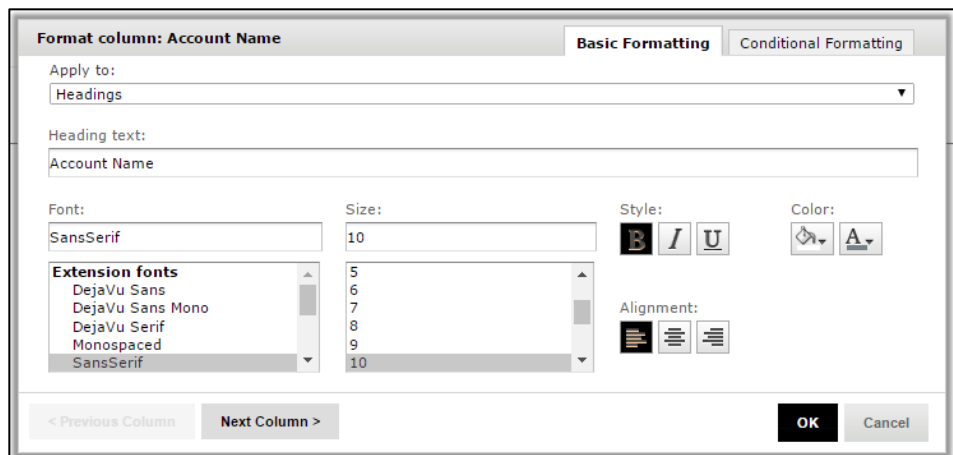
To format a column conditionally:

	Total Members on 10/01/2014	Ch
	1	09
	2	
	57	
	70	

1. Click any column to highlight it.

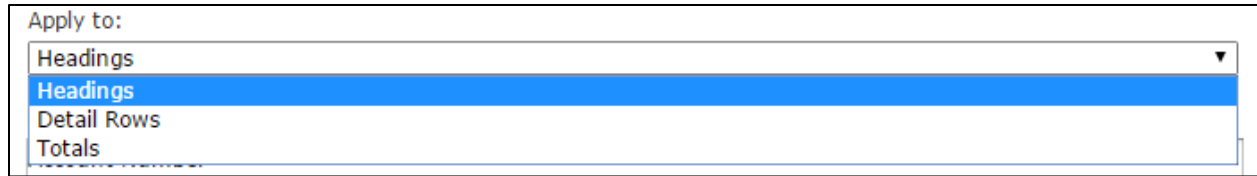


2. At the top of the column, hover over the first button.
3. Click **Formatting**.

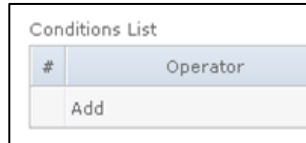


The **Format column** window appears.

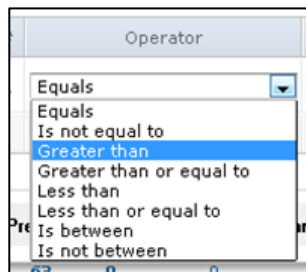
4. Click **Conditional Formatting**.



- In the **Apply** to list, select the part of this column that you want to format conditionally.

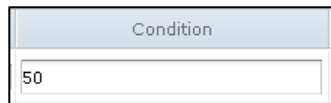


- In the **Conditions List** section, click **Add**.



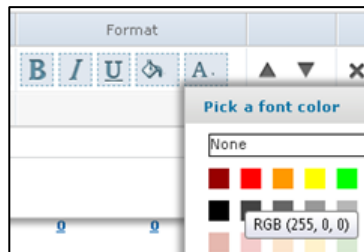
- In the **Operator** column, select a comparison that you want to apply to the values in this column.

For example: If you want to highlight any numbers greater than 50 in red, select **Greater than**.



- In the **Condition** column, enter a value that you want to compare the values in this column against.

For example: If you want to highlight any numbers greater than 50 in red, enter 50.



- In the **Format** column, specify any formatting that you want to apply to the values in this column if the condition to the left is true.

For example: If you want to highlight any numbers greater than 50 in red, specify red as the font color.

10. If you want to add any further conditional formatting to this column, repeat steps 6-9.

11. Click **OK**.

Total Members on 10/01/2014		Ci
		09
		10
0		1
0		2
0		67

Your conditional formatting is applied to this column. In this example, all numbers in detail rows greater than 50 are now red.

Hiding and showing columns

To hide a column:

ations	Total Members on 10/01/2014	Ch 09
0	1	
0	2	
0	67	
0	70	

1. Click any column to highlight it.

ations	Total Members on 10/01/2014	Ch 09
0	1	0.00%

2. At the top of the column, hover over the first button.
3. Click **Hide column**.
4. The column disappears.

If you have hidden a column and want to show it again:

ations	Total Members on 10/01/2014	Ch 09
0	1	
0	2	
0	67	
0	70	

1. Click any column to highlight it. This can be any column in the report that is still visible.

ations	Total Members on 10/01/2014	Ch 09
0	1	0.00%

2. At the top of the column, hover over the first button.
3. Hover over **Show columns**.
4. Select the hidden column that you want to show.

The column reappears.

Filtering columns

To filter the report based on a specific column:

Total Members on 10/01/2014		Change
0	1	
0	2	
0	67	
0	70	

1. Click any column to highlight it.

Total Members on 10/01/2014		Change
0	1	

2. At the top of the column, click the second button.

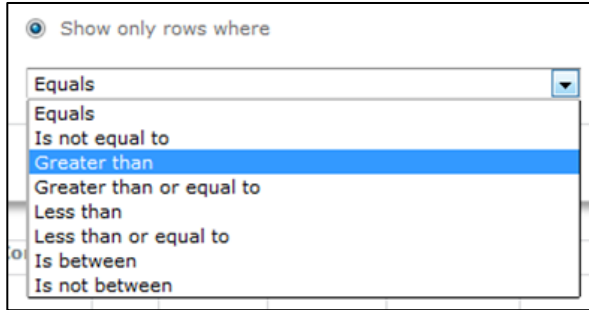
Filter column: Account Name

Show all rows
 Show only rows where

The **Filter column** window appears.

Show only rows where
 Show all rows

3. In the **Filter column** window, click **Show only rows where**.



4. Choose a comparison that you want to make in your column filter.



5. Enter text or a number that you will use to compare this column to in your column filter.

For example: If you only want to show rows where the value in this column is greater than 5, select **Greater than** from the dropdown list and enter 5.

6. Click **OK**.

A screenshot of a report table. The table has a header row with the following text: "ns", "Total Members on", "10/01/2014", and "C". Below the header is a row with the value "10". At the bottom of the table, there are two small boxes containing the numbers "0" and "57". A small downward-pointing triangle icon is located next to the "Total Members on" header, indicating that a filter is applied to this column.

The report data is filtered. The filter icon appears next to the column header to indicate that this column has a filter applied to it.

Sorting columns

To sort report data based on a specific column:

	Total Members on 10/01/2014	Change % on 10/01/2014
0	1	
0	2	
0	67	
0	70	

1. Click the column that you want to sort by to highlight it.

	Total Members on 10/01/2014	Change % on 10/01/2014
0	1	0.00%
0	2	100.00%

2. At the top of the column, click either the up arrow or the down arrow to sort the column in either ascending or descending order.

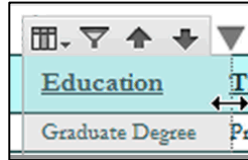
	Total Members on 10/01/2014 ▲	Change % on 10/01/2014
1	0	
1	0	
1	0	

The report data is sorted. The sort icon appears next to the column header to indicate that this column has a filter applied to it.

Resizing and moving columns

To resize a column:

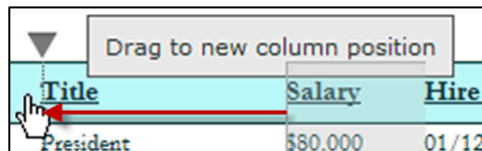
1. Click to highlight the column that you want to resize.



2. Hover over the dotted border to the right of the column.
3. The mouse pointer changes to a double arrow.
4. Drag the dotted border to the left or right to resize the column.

To move a column:

1. Click to highlight the column that you want to move.



2. Click in the column and drag it to a new location.
3. When the dotted border is in the position that you want, release the mouse.
4. The column moves to the position that you indicated.

Undoing and redoing report actions

Use the three undo/redo buttons to undo and redo actions that you have performed on your report.



To undo an action that you have just performed on a report:

- Click the  **Undo** button.

To redo an action that you have just undone with the **Undo** button:

- Click the  **Redo** button.

To undo all actions that you have performed and return to the initial report state:

- Click the  **Undo All** button.

Rerunning the report

If you want to change the filters and rerun the report, click the icon.



The input controls window appears. You can enter the filters and run the report again.

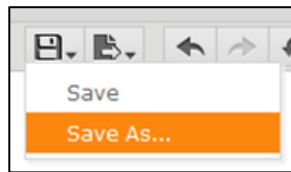
Saving or exporting a report


Saving a report

Once you have made modifications to an existing report, you can save it so that you can quickly run it again in the future with all the same formatting, sorting, and filtering.

Note: If your ACTIVENet user account does not have Full Access to the **Reports: ACTIVE Net Insights** system user profile function option, then you cannot save report modifications.

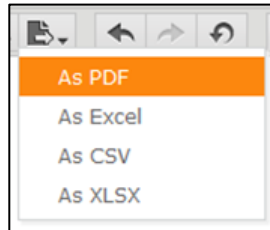
To save a report:




1. Hover your mouse over the  **Save** menu at the top of the report page.
2. Click **Save As**.
3. Enter a unique **Name** for your custom report.
4. Enter an optional **Description**.
5. Select a location to save your custom report.
6. Click **Save**.

Exporting a report

You can export the data in your report to several different file types. To export a report:



1. Hover your mouse over the  **Export** menu at the top of the report page.
2. Click the type of file that you want to export the report to:
 - To export to a PDF file, click **As PDF**. You will not be able to manipulate data when it is displayed in PDF form.
 - To export to an XLS spreadsheet file, click **As Excel**. You will be able to manipulate your data in Excel the same way you can with other spreadsheets.
 - To export to a CSV (comma-separated values) file, click **As CSV**. You can import this file into spreadsheet or other compatible software.
 - To export to an XLSX spreadsheet file, click **As XLSX**. This file type corresponds to newer versions of Excel.

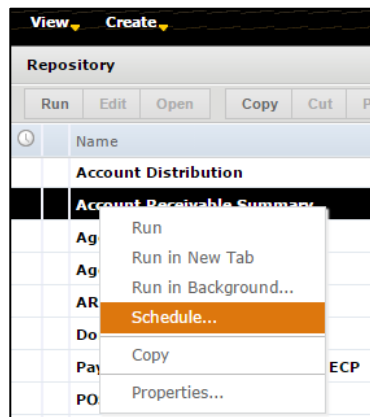
Scheduling a report

Creating a schedule for a report

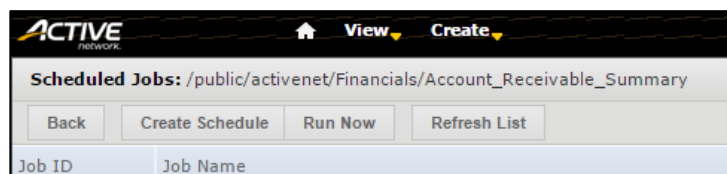
Note: If your ACTIVE Net user account does not have Full Access to the **Reports: ACTIVE Net Insights** system user profile function option, then you cannot create and save report schedules.

To schedule a report to run automatically at a future time:

1. On the **Repository** page, navigate to the folder where your report is located, so that its title displays on the page.
2. Right-click the report's title and click **Schedule**.



3. On the **Scheduled Jobs** page, click **Create Schedule**.



4. In the **Schedule** tab, specify when the scheduled report will start along with how often it will recur, if applicable.

Schedule For: /public/activenet/Financials/AgencyPayment

Schedule Start

Start Date:

Immediately

On Specific Date:

2016-03-01 03:00

Time Zone:

America/Los_Angeles - Pacific Standard Time

Recurrence:

Recurrence Type:

Calendar

Months:

Every Month

Selected Months:

Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec

Days:

Every Day

Selected Days:

Sun
Mon
Tue
Wed
Thu
Fri
Sat

Dates in Month:

1

Enter dates (9, 12, 15) or date ranges (9-12, 1-17)

Times:

Hours (required):

6

Enter 24-hour times like 9, 12, 15 or ranges like 9-12, 1-17

Minutes (required):

0

Enter 0, 15, 30, 45 to run every 1/4 hour

Schedule End

End Date:

2017-03-01 00:00

Holidays

Calendar of dates to exclude:

None

For example, to schedule a report that runs on the 1st of every month:

- Select **Recurrence Type** as **Calendar**.
- Select the **Every Month** and **Dates in Month** radio buttons.
- Enter 1 in the **Dates in Month** field.
- Enter preferred time to the **Hours** and **Minutes** fields.

Input Controls

PLEASE NOTE
 Max 31 days or 1 month of Data Returned Based on Start Date

* **Start Date (YYYY-MM-DD)**

 This field is mandatory so you must enter data.

* **End Date (YYYY-MM-DD)**

 This field is mandatory so you must enter data.

* **Transaction Site**

Workstation
 Internet
 Internet
 Internet
 All None Inverse

Refund Payment Type
 ACCOUNT
 CASH
 CHECK
 All None Inverse

* **Grouping**

Apply OK Reset Cancel

5. In the **Parameters** tab, specify any **Input Controls** that you want to use for the scheduled report. For more information about input controls, see [Using input controls/parameters](#).
 For example, to schedule a report that provides results for the previous month, enter **MONTH-1** in the **Start Date** field and **MONTH** in the **End Date** field.

Output File Options

File name (required):

Description:

Time Zone:

Output Locale:

Formats:

CSV XLSX Excel

PDF

File Handling:

Overwrite Files

Sequential File Names by Timestamp

Timestamp Pattern:

- In the **Output Options** tab, select an output file format and enter a name for the report file that will be created during the schedule.

Output Destination

Output To Repository

Output To Host File System

Output To FTP Server

Server Address:

Port: Transfer Protocol:

Directory:

Username: Password:

SSH Key Authentication

Path to SSH Private Key:

Hint: /sshKeys/myOpenSSHKey

SSH Key Passphrase (optional):

- Enter an **Output Destination** to specify where you want the file to be exported to.

Note: If you select **Output To Repository**, then click **Browse** and save your scheduled report to your personal folder.

To schedule outputting a report to an FTP server, enter the FTP server as the output destination.

- **Server Address:** The IP address of the organization’s FTP server.

- **Port:** The port number of the FTP server (defaults to port 21). Ensure that port 21 is open on the FTP server.
- **Transfer Protocol:** The FTP server transfer protocol.
- **Directory:** The directory to store the output report.
- **Username/password:** The FTP server login username and password.
- **SSH Key Authentication:** If the organization's FTP server requires SSH, the SSH Key must be stored on the Insights portal. **To use this function, submit a request to the ACTIVE Net support team.**
- **Path to SSH Private Key:** the path to locate the SSH private key file.
- **SSH Key Passphrase (optional):** enter a passphrase to use to the SSH Private Key.

Schedule For: /public/activenet/Financials/AgencyPayment

Email Notification

Send report when scheduler runs

To:

Use commas to separate addresses

CC:

BCC:

Subject:

Message:




Include report files as attachments
 Include report files as ZIP attachment
 Include HTML report in email body
 Do not send emails for empty reports

8. In the **Notifications** tab, specify email addresses where you want the scheduled report to be sent.
9. Click **Save**.
10. In the **Save As** window, enter a name for this scheduled job.
11. Click **Save**.

Editing or deleting an existing schedule for a report

Note: If your ACTIVE Net user account does not have Full Access to the **Reports: ACTIVE Net Insights** system user profile function option, then you cannot edit or delete report schedules.

To edit or delete the schedule for a report:

1. Choose one of the following:
 - a. On the **Repository** page, navigate to the folder where your report is located, so that its title displays on the page. Click the  **Schedule Report** icon to the left of a report's name.
 - b. Go to **View > Schedules** and search for the report schedule.
2. On the **Scheduled Jobs** page, choose one of the following:
3. To edit an existing schedule, click the  pencil icon at the right of a scheduled job.
4. To delete an existing scheduled job, click the  (X button) to the right of a scheduled job.

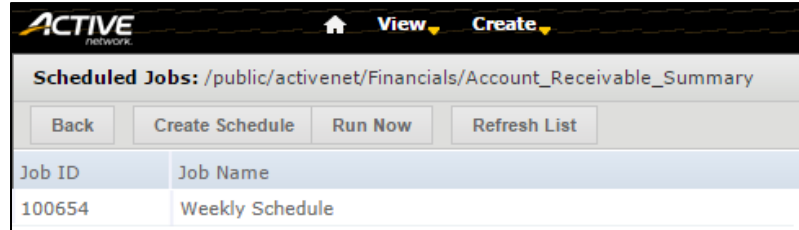
Enabled



5. To temporarily disable a scheduled job without deleting its information, clear the **Enabled** box at the right of a scheduled job.

Running scheduled jobs now

Note: If your ACTIVE Net user account does not have **Full Access** to the **Reports: ACTIVE Net Insights** system user profile function option, then you cannot edit or delete report schedules.



To run the scheduled jobs for a report right now instead of waiting for the scheduled time, click **Run Now** on the **Scheduled Jobs** page. You can use the **Run Now** button to test out your scheduled report and make sure it works as planned prior to the actual scheduled time.

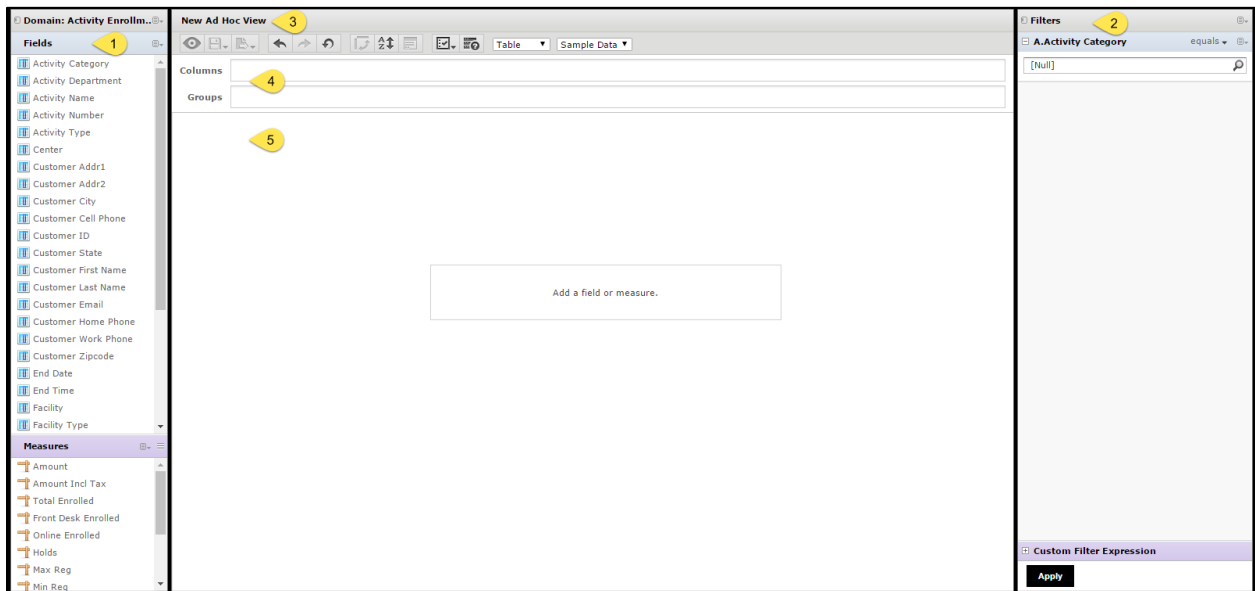
Ad Hoc reporting

Ad hoc reporting is recommended to be used by Advanced / Power users.

Overall layout


The Ad Hoc Editor page

The Ad Hoc Editor is the page in ACTIVE Net Insights where you can view, edit, and save ad hoc views as tables, charts, and crosstabs.




The Ad Hoc editor contains the following areas:











1. **Data Selection** panel: Lists the fields that you have chosen to be available in your ad hoc view. The **Fields** section includes non-numerical data, while the **Measures** section includes numerical data.

Click the  button to the left of the heading in the Data Selection area to hide or display the Data Selection area.

2. **Filters** panel: Lists the filters that are currently being applied to the information in your ad hoc view.

Click the  button to the left of the heading in the Filters area to hide or display the Filters area.

3. **Toolbar**: Includes buttons and lists to manage your ad hoc view and specify how it displays.

- a.  **Display:** Toggle between design and display modes.
 - b.  **Save:** Save your ad hoc view as a view and/or as a report.
 - c.  **Export:** Export your ad hoc view as a report to one of several available formats.
 - d.  **Undo:** Undo your most recent action.
 - e.  **Redo:** Redo an action that you have just undone using the **Undo** button.
 - f.  **Undo All:** Undo all of your actions for this ad hoc view and go back to the last state that was saved.
 - g.  **Switch Group:** Switch columns and rows. The data in the ad hoc view will remain the same, but it will be reoriented so that columns become rows and rows become columns.
 - h.  **Sort:** Sort one or more columns in the ad hoc view.
 - i.  **Input Controls:** Open the **Input Controls** window for this ad hoc view.
 - j.  **Page Properties:** Choose whether to display the title bar and/or layout band.
4. **Layout band:** Displays the fields that are currently being used to display information in your ad hoc view.
 5. **Canvas area:** Displays your ad hoc view itself.

Report page

Activities Fill Rate Report Data refreshed Sep 23, 2013 at 3:24:39 AM

Site	Measures	Fall 2014	Spring 2014	Summer 2014	Totals
		Totals	Totals	Totals	Totals
Community Services	Total Enrolled	69	9	135	213
	Amount	5,492.23	225.00	21,592.47	27,309.70
	Fill Rate	0.19	0.09	0.46	0.28
Online Community	Total Enrolled	130		368	498
	Amount	3,465.50		75,080.50	78,486.00
	Fill Rate	0.65		0.53	0.56
Totals	Total Enrolled	199	9	503	711
	Amount	8,897.73	225.00	96,672.97	105,795.70
	Fill Rate	0.35	0.09	0.51	0.43

To see the report page, run any ad hoc report in ACTIVE Net Insights.

The report page includes the following elements:

- **Refresh** – Refresh the report with the latest data.
- **Page controls** – Enter a page number or use the navigation buttons to go to a specific page in the report.

Note: Page controls only display if your report spans multiple pages.
- **Zoom controls** – Use the +/- buttons or the dropdown list to specify how large you want the report to display on the page.
- **Back** – Click **Back** to go back to whatever page you ran this report from.
- **Save** – Save the customizations you have made to a new report so that you can easily access them again in the future.

Note: If your ACTIVE Net user account does not have **Full Access** to the **Reports: ACTIVE Net Insights** system user profile function option, then you cannot save report customizations.
- **Export** – Export the data in this report to a file that you can open in an external application.
- **Undo/redo controls** – Undo your most recent report action, or redo an action you have just undone.
- **Options** – Modify this report's input controls so that you can change the filters being used to narrow down report data.

Creating an ad hoc view

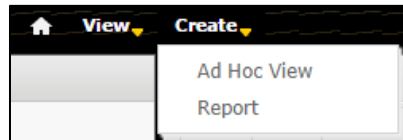
An ad hoc view is different from a regular report. Instead, it is a kind of template that specifies which data and layout to use for reports that are based on this view.

You can use an ad hoc view to create your own reports from scratch, but you can also use it on its own to preview your data dynamically. Use ad hoc views to create tables, charts, and crosstabs based on the data that you choose to include in the view.

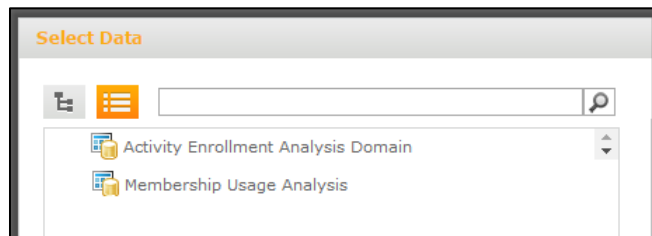
A domain contains a group of related fields that you can choose to include in your ad hoc view. It is not possible to include information in your ad hoc view unless that information is a part of the domain that you have selected for the view.

For the details for the domains, see the ACTIVE Net Insights ad hoc reports user guide.

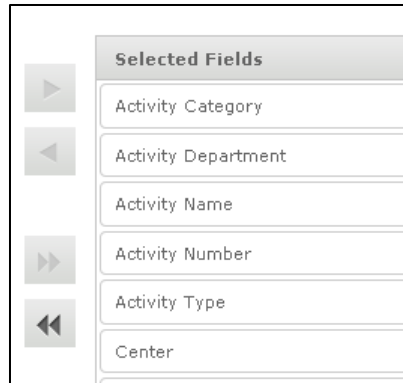
To create an ad hoc view:



1. Go to **Create > Ad Hoc View**.



2. In the **Select Data** window, select a domain to use.
3. Click **Choose Data...**



4. On the **Data Chooser** page, select the fields in this domain that you want to be available for your ad hoc view to use, and move them from the **Source** list to the **Selected Fields** list. Use the Ctrl and Shift keys to select multiple fields.

Note: To select all available fields for your ad hoc view, click the



(double arrow) button.

5. Click **OK**.
6. The **Ad Hoc Editor** appears, with the fields that you selected listed in the panel on the left.

For how to create a table, chart and crosstab in ad hoc views, see the ACTIVE Net Insights ad hoc reports user guide.

Opening an existing ad hoc view

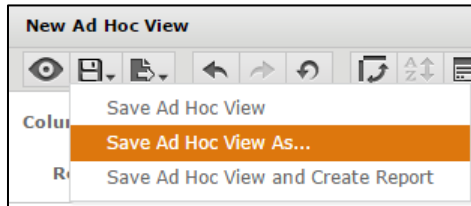
To open an ad hoc view that you have already saved:

1. Go to **View > Repository**.
2. Click the folder for your organization.
3. A list of your organization's saved reports and ad hoc views appears.
4. Click the name of the ad hoc view that you want to open.

Note: If you edit an ad hoc view that already has reports associated with it, then those reports will pick up any changes that you make to the ad hoc view that they are based on.

Saving an ad hoc view

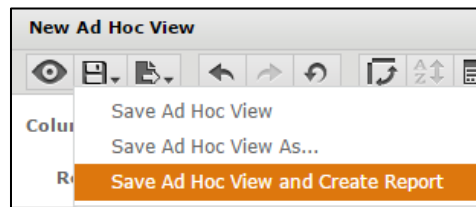
To save your ad hoc view so that you can return to it in the future:



1. Hover over the **Save** button.
2. Click **Save Ad Hoc View As**.
3. Enter a name for your ad hoc view in the **Data View Name** box.
4. Enter an optional description for your ad hoc view in the **Data view Description** box.
5. Specify a location to save your ad hoc view.
6. Click **Save**.

Saving an ad hoc view and creating a report

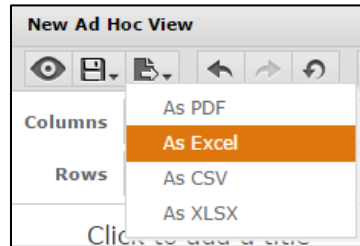
To create a report from your saved ad hoc view:



1. Hover over the **Save** button.
2. Click **Save Ad Hoc View and Create Report**.
3. In the **Save Ad Hoc View and Create Report** window:
 - a. Enter the **Report Name**.
 - b. Enter an optional **Report Description**.
 - c. Specify the location where you want to save this report.
 - d. Click **Save**.

Exporting an ad hoc view

To export your ad hoc view to external systems:



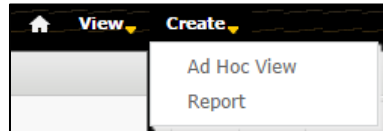
1. Hover over the **Export** button.
2. Select the format to export your ad hoc view

Creating an ad hoc report from an existing ad hoc view

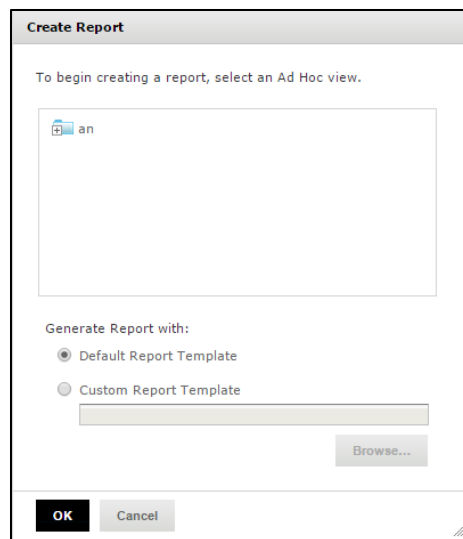
Ad hoc Report based on an ad hoc view is similar to interactive reports. They are interactive and personalized versions can be saved.

Before you run an ad hoc report, make sure you have created an ad hoc view.

To create an ad hoc report:



1. Go to **Create > Report**.



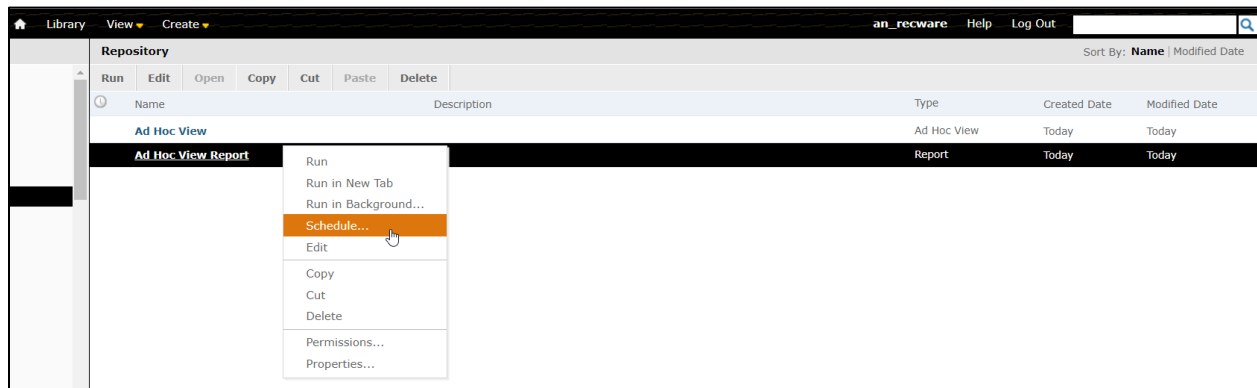
2. Select an ad hoc view from the customized folder.
3. Select the Report Template.
4. Click OK.

Scheduling an ad hoc view

Ad hoc views can only be scheduled from a saved report and cannot be directly scheduled on the ad hoc view. To schedule an ad hoc view, refer to [Saving an ad hoc view and creating a report](#) or [Creating an ad hoc report from an existing ad hoc view](#) to create a report for the required ad hoc view and schedule the report.

To schedule the report:

1. Open the folder where you saved the report.
2. Right-click the report.



3. Click **Schedule**.

For more information on scheduling a report, refer to [Scheduling a report](#).

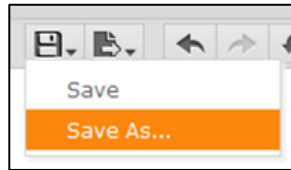
Saving or exporting a report


Saving a report

You can save the report so that you can quickly run it again in the future with all the same formatting, sorting, and filtering.

Note: If your ACTIVE Net user account does not have Full Access to the **Reports: ACTIVE Net Insights** system user profile function option, then you cannot save report modifications.

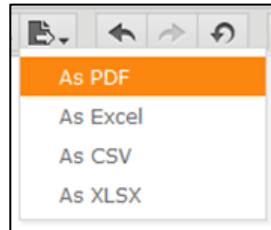
To save a report:




1. Hover your mouse over the  **Save** menu at the top of the report page.
2. Click **Save As**. The Save As window appears.
3. Enter a unique **Name** for your custom report.
4. Enter an optional **Description**.
5. Select a location to save your custom report.
6. Click **Save**.

Exporting a report

You can export the data in your report to several different file types. To export a report:



1. Hover your mouse over the  **Export** menu at the top of the report page.
2. Click the type of file that you want to export the report to:
 - To export to a PDF file, click **As PDF**. You will not be able to manipulate data when it is displayed in PDF form.
 - To export to an XLS spreadsheet file, click **As Excel**. You will be able to manipulate your data in Excel the same way you can with other spreadsheets.
 - To export to a CSV (comma-separated values) file, click **As CSV**. You can import this file into spreadsheet or other compatible software.
 - To export to an XLSX spreadsheet file, click **As XLSX**. This file type corresponds to newer versions of Excel.

Frequently Asked Questions

- Q:** How much data does the interactive report display?

A: Each interactive report enables users to explore up to 13 months of data through a simple and intuitive web browser interface.
- Q:** How much data can the report scheduler generate?

A: The report scheduling can return up to 13 months of data across all selected sites. Please refer to the [Scheduling a report](#) section on how to use the scheduler.
- Q:** Why does my selection filters reset when I attempt to drilldown into the interactive report?

A: They may occur if the number of filters you have selected requires a URL that exceeds Internet Explorer's maximum URL length of 2083 characters.
- Q:** Why are the data refreshed time and report generated time different?

A: The **Data refreshed time** and the **Report Generated time** are based on different time zones when generated on the output page for a report. In some cases, the **Next Run time** on the **Scheduled Jobs** page may display in a different time zone from the time it was originally entered on the **New Schedule** page.
- Q:** Why do I get an error message when I schedule a report using .xls output?

A: You may encounter errors if scheduled .xls reports contain more than 65,000 rows, because .xls files can only display a maximum of 65,000 rows of data. We recommend you output scheduled reports using .xlsx file format to avoid this error message.
- Q:** Why cannot I schedule a report and save to the shared folder?

A: You cannot schedule a report or run in background and save it to the Shared Folder if the overwrite files check box is not selected.