<table>
<thead>
<tr>
<th>Concept</th>
<th>Description</th>
</tr>
</thead>
</table>
| Break Groups | Break groups determine how to sort and total the report. Break groups do not filter the data; instead they define the rows on a report. If the report includes multiple break group parameters then you can nest the sorting and totaling within each group. For example, if you enter Campaign for Break Group 1 and Initiative for Break Group 2, then TA sorts the report by Campaign, prints totals for each Campaign, and sorts information in each Campaign by Initiative and prints totals for each Initiative. A page break group functions as a Break Group 1 and creates a new page for each new value. For example, if you set the page break group to "Activity Type", TA begins a new page for each activity type. Here is an example of the layout of sorting and totaling if you used three break groups for a report:  

<table>
<thead>
<tr>
<th>Break Group 1</th>
<th>col. 1</th>
<th>col. 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Break Group 2</td>
<td>#</td>
<td>#</td>
</tr>
<tr>
<td>Break Group 3</td>
<td>#</td>
<td>#</td>
</tr>
<tr>
<td>Break Group 2</td>
<td>#</td>
<td>#</td>
</tr>
<tr>
<td>Break Group 3</td>
<td>#</td>
<td>#</td>
</tr>
<tr>
<td>Break Group 3</td>
<td>#</td>
<td>#</td>
</tr>
<tr>
<td>Break Group 3</td>
<td>#</td>
<td>#</td>
</tr>
</tbody>
</table>

Break Group 2 values are the sum of the Break Group 3 values in a column, and Break Group 1 values are the sum of Break Group 2 values in a column. |

| Columns       | Using Break Groups and Column parameters allow you to create your own matrix report. You define columns by entering a column category, column criteria, and column headings. After you choose the category, you enter the specific column criteria, and then define the text that displays as the column heading(s). TA displays a column for each criterion that you enter, as well as "All Others" and "Totals" columns. Example: You want to see the number of accounts within each ZIP code – but you also want to see the number for each account activity status (active, lapsed, grace)  

Account Statistics report  
Break Group: Zip Code  
Column Category: Status (Account Activities)  
  Column 1: A  
  Column 1 Heading: Active  
  Column 2: G  
  Column 2 Heading: Grace  
  Column 3: L  
  Column 3 Heading: Lapsed  

Use the additional where clause to limit to a specific zip code or range of zip codes. For example: ad.zip_code like ‘317%’ |
**Orientation to Reports:**
**Quick Summary**

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Entering Dates and Using Date Type (Fiscal and Calendar Year)</td>
<td>Certain reports include a <strong>Date Type</strong> parameter to enable you to choose whether to use a calendar or fiscal date for the report. You can enter calendar and fiscal dates as either absolute or relative values. You can use an absolute date to enter a specific date (03/15/03). You can use a formula to represent a date that is relative to the current date (T-7 for today minus 7 days which is one week prior to the current date). Relative dates are useful for running regularly scheduled reports. You can mix absolute and relative values in the same report.</td>
</tr>
</tbody>
</table>

To enter a relative **calendar date**, enter it in this format:

```
Placeholder [+ or -] Number of days or number of months;
```

"Placeholder" is one of the following words or letters:

- Today (or the letter "T") for the current date
- First (or the letter "F") for the first day of the current month
- Last (or the letter "L") for the last day of the current month

Examples: "Today - 2" refers to the day before yesterday; "First - 1M" is the first day of last month.

Note: For reports that are scheduled to run nightly, and they are scheduled to run after midnight (for example 3/14/03 00:30:00), the report considers the T date parameter to be the day before the run date (equivalent to 3/13/00 in our example). Everything that runs before 6:00AM is considered part of the previous day's work.

This chart assumes that the current calendar date is March 15, 2003.

<table>
<thead>
<tr>
<th>Values Entered</th>
<th>Value TA Uses For Reporting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Today</td>
<td>3/15/03</td>
</tr>
<tr>
<td>T</td>
<td>3/15/03</td>
</tr>
<tr>
<td>T-5</td>
<td>3/10/03</td>
</tr>
<tr>
<td>First</td>
<td>3/1/03</td>
</tr>
<tr>
<td>First -1</td>
<td>2/28/03</td>
</tr>
<tr>
<td>T-1M</td>
<td>2/15/03</td>
</tr>
<tr>
<td>Last</td>
<td>3/31/03</td>
</tr>
<tr>
<td>L-6M</td>
<td>9/30/02</td>
</tr>
<tr>
<td>F-6M</td>
<td>9/1/02</td>
</tr>
</tbody>
</table>

To enter a relative **fiscal date**, use the format:

```
Current fiscal year or month [+ or -] N (number of years or months)
```

Example: "Current - 1" for the previous fiscal year. You can use the letter "C" instead of the word "current" to represent the current month or year.

If the report does not include separate parameters for fiscal year and fiscal month, enter the fiscal date in the format MM/YYYY.
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| General Options for Using the Request Parameters Window                                      | **Entering one or multiple values and using F9:** In many of the parameter fields there is a list of values from which you can select by pressing [F9]. You can enter one value or select multiple items (one at a time). If you select multiple items, TA enters each value separated by a comma in the parameter field.  

**What happens if you leave a field blank:** TA ignores the criteria if you leave a parameter blank. For example, if the report includes Start and End Date: if you leave Start Date blank TA selects dates before the End Date; if you leave End Date blank TA selects any date after the Start Date; if both dates are blank, TA selects information with no date restrictions.  

**Using ALL and other standard options:** Use ALL if you want the report to include all values available and not limit the report by that parameter. You can also enter the words “NULL,” and “NOT NULL” for a parameter.  

Some fields permit you to use the wildcard, “%,” to represent multiple values for the parameter.  

You can exclude values for a parameter by using the tilde symbol, i.e., “~,” before the value or values you want to exclude. For example, you can exclude an activity type for your organization.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Additional Where Clause                      | This is your “wildcard” parameter that permits you to limit the data to specific tables and field values. If the combination of parameters is not enough to restrict the data that you want in a report, then use this parameter.  

You must enter this parameter by writing a valid SQL statement. Check the hint text to verify which tables can be referenced.  

How you write the statement differs based on which report and for what reason you are writing it. Here is a guideline:  

\[ t\.column\_name = 'value' \]  

**Table alias (see online Help)**  

**The field name (but not exactly how you see it on screen).**  

Use the file layout for the SQL name for the field.  

Example: \[ aa\.current\_activity = 'TM' \]  

Will limit the report to only those accounts with a current activity of TV annual membership.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
### Saving Copies of a Report

You can save a copy of a report to show in your menu. To do this, go to the System Maintenance module and follow the steps below:

1. Go to the User Preferences screen
2. Select the Reports tab
3. In the Operation field, use the blue triangle to view the reports, and select the one you want
4. Set the parameters
5. Click Save As
6. Enter the Name of the report. Example: Amy's Weekly Stats Report
7. Mark whether you want the Amy's Weekly Stats Report to view on the menu and/or in your Favorites menu.

### Saving your Defaults

Set the parameters as you want to see as your default for that particular report. Click <Save Settings>. The next time you call up that report, your defaults will display.

### Reports as an Output

Many reports in Team Approach can be run with a queried set of records. This means your query can filter records using its criteria and then you can run those records through the parameters on the report as well. Reports that are often run with a Query:

- Transaction Summary
- Account Statistics
- Revenue Statistics
- Account Profile