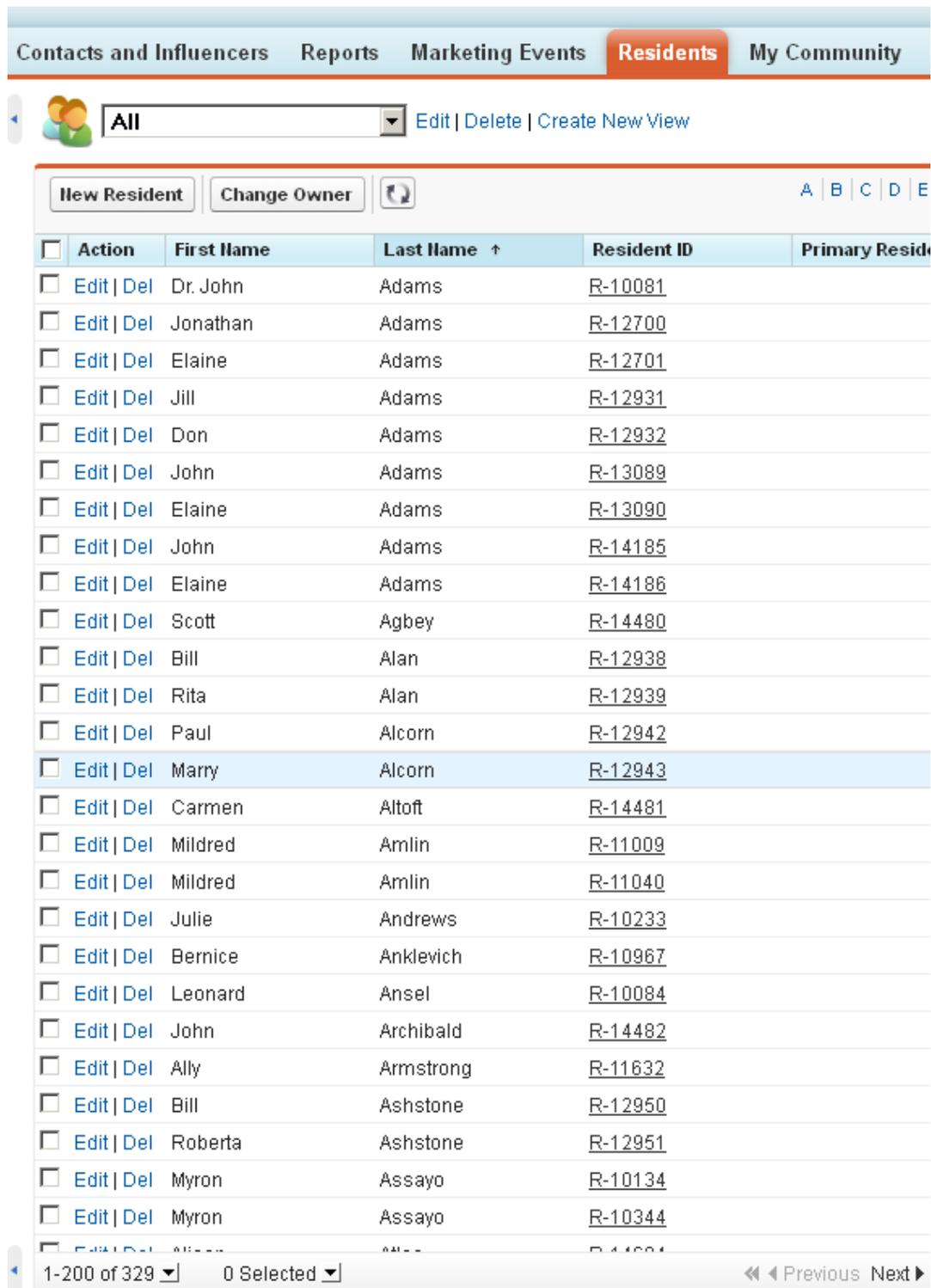


## How to do Basic Reporting

If you are interested in knowing how many prospects, suites, residents, or anything else you have in your community, there is no need to print a full report. A simple change to your tab's "view" can show you this. In this example I would like to know how many Residents are present in the building.



The screenshot shows the software interface with the following elements:

- Navigation Tabs:** Contacts and Influencers, Reports, Marketing Events, **Residents** (selected), My Community.
- View Selector:** A dropdown menu set to "All" with options for "Edit | Delete | Create New View".
- Table Controls:** "New Resident" button, "Change Owner" button, and a refresh icon.
- Table:** A table with columns: Action, First Name, Last Name ↑, Resident ID, and Primary Reside. The table contains 329 rows of resident data.
- Table Data (Sample):**

Action	First Name	Last Name ↑	Resident ID	Primary Reside
<input type="checkbox"/> Edit   Del	Dr. John	Adams	<a href="#">R-10081</a>	
<input type="checkbox"/> Edit   Del	Jonathan	Adams	<a href="#">R-12700</a>	
<input type="checkbox"/> Edit   Del	Elaine	Adams	<a href="#">R-12701</a>	
<input type="checkbox"/> Edit   Del	Jill	Adams	<a href="#">R-12931</a>	
<input type="checkbox"/> Edit   Del	Don	Adams	<a href="#">R-12932</a>	
<input type="checkbox"/> Edit   Del	John	Adams	<a href="#">R-13089</a>	
<input type="checkbox"/> Edit   Del	Elaine	Adams	<a href="#">R-13090</a>	
<input type="checkbox"/> Edit   Del	John	Adams	<a href="#">R-14185</a>	
<input type="checkbox"/> Edit   Del	Elaine	Adams	<a href="#">R-14186</a>	
<input type="checkbox"/> Edit   Del	Scott	Agbey	<a href="#">R-14480</a>	
<input type="checkbox"/> Edit   Del	Bill	Alan	<a href="#">R-12938</a>	
<input type="checkbox"/> Edit   Del	Rita	Alan	<a href="#">R-12939</a>	
<input type="checkbox"/> Edit   Del	Paul	Alcorn	<a href="#">R-12942</a>	
<input type="checkbox"/> Edit   Del	Marry	Alcorn	<a href="#">R-12943</a>	
<input type="checkbox"/> Edit   Del	Carmen	Altoft	<a href="#">R-14481</a>	
<input type="checkbox"/> Edit   Del	Mildred	Amlin	<a href="#">R-11009</a>	
<input type="checkbox"/> Edit   Del	Mildred	Amlin	<a href="#">R-11040</a>	
<input type="checkbox"/> Edit   Del	Julie	Andrews	<a href="#">R-10233</a>	
<input type="checkbox"/> Edit   Del	Bernice	Anklevich	<a href="#">R-10967</a>	
<input type="checkbox"/> Edit   Del	Leonard	Ansel	<a href="#">R-10084</a>	
<input type="checkbox"/> Edit   Del	John	Archibald	<a href="#">R-14482</a>	
<input type="checkbox"/> Edit   Del	Ally	Armstrong	<a href="#">R-11632</a>	
<input type="checkbox"/> Edit   Del	Bill	Ashstone	<a href="#">R-12950</a>	
<input type="checkbox"/> Edit   Del	Roberta	Ashstone	<a href="#">R-12951</a>	
<input type="checkbox"/> Edit   Del	Myron	Assayo	<a href="#">R-10134</a>	
<input type="checkbox"/> Edit   Del	Myron	Assayo	<a href="#">R-10344</a>	
- Footer:** "1-200 of 329" (with a dropdown), "0 Selected" (with a dropdown), and "Previous Next" navigation arrows.

Now I know that I don't have 329 Residents in the building, so this will require more filtering to be done.

Click Create New View at the top of the page.

**Step 1. Enter View Name**

**View Name:**  

**View Unique Name:**

**Namespace Prefix:** iar

**Created By:** [Larry Wieskopf](#), 9/28/2012 1:26 PM **Modified By:** [Larry Wieskopf](#), 9/28/2012 1:27 PM

**Step 2. Specify Filter Criteria**

**Filter By Owner:**

All Residents

My Residents

**Filter By Additional Fields (Optional):**

Field	Operator	Value	
<input type="text" value="Community"/>	<input type="text" value="contains"/>	<input type="text" value="GTA"/>	AND
<input type="text" value="Status"/>	<input type="text" value="equals"/>	<input type="text" value="Present"/>	AND
<input type="text" value="-None-"/>	<input type="text" value="-None-"/>	<input type="text"/>	AND
<input type="text" value="-None-"/>	<input type="text" value="-None-"/>	<input type="text"/>	AND
<input type="text" value="-None-"/>	<input type="text" value="-None-"/>	<input type="text"/>	

[Add Filter Logic...](#)

**Step 3. Select Fields to Display**

Available Fields	Selected Fields
<div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;">           Discharge Resident            Effective Date            Email            Evacuation Status            Expected Admission Date            Ext.            Furniture Arrives            Gender            -         </div>	<div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;">           Resident ID  <b>First Name</b>            Last Name            Suite            Move in Date         </div> <div style="margin-top: 5px;"> <input type="button" value="Top"/>  <input type="button" value="Up"/>  <input type="button" value="Down"/>  <input type="button" value="Bottom"/> </div>

Your View Name should describe the type of filters you want. In this case, this view will only show me residents present in the building so I named it "GTA Current".

The filter criteria should be as follows. The Owner should be All Residents. In the Field section, use the drop down list to add a filter for any specific field on the Resident tab. In this example the Community I want to see the Residents for will contain the letters GTA.

**Step 1. Enter View Name**

View Name:

View Unique Name:  i

Namespace Prefix:

Created By: [Larry Wieskopf](#), 9/28/2012 1:26 PM Modified By: [Larry Wieskopf](#), 9/28/2012 1:27 PM

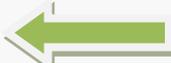
**Step 2. Specify Filter Criteria**

**Filter By Owner:**

All Residents 

My Residents

**Filter By Additional Fields (Optional):**

Field	Operator	Value
<input type="text" value="Community"/>	<input type="text" value="contains"/>	<input type="text" value="GTA"/> 
<input type="text" value="Status"/>	<input type="text" value="equals"/>	<input type="text" value="Present"/>  AND
<input type="text" value="-None-"/>	<input type="text" value="-None-"/>	<input type="text" value=""/> AND
<input type="text" value="-None-"/>	<input type="text" value="-None-"/>	<input type="text" value=""/> AND
<input type="text" value="-None-"/>	<input type="text" value="-None-"/>	<input type="text" value=""/>

[Add Filter Logic...](#) 

**Step 3. Select Fields to Display**

Available Fields	Selected Fields
<ul style="list-style-type: none"> <li>Discharge Resident</li> <li>Effective Date</li> <li>Email</li> <li>Evacuation Status</li> <li>Expected Admission Date</li> <li>Ext.</li> <li>Furniture Arrives</li> <li>Gender</li> </ul>	<ul style="list-style-type: none"> <li>Resident ID</li> <li style="background-color: #e0e0e0;">First Name</li> <li>Last Name</li> <li>Suite</li> <li>Move in Date</li> </ul> <div style="text-align: right; margin-top: 5px;">             Top   <input type="button" value="Up"/>   <input type="button" value="Down"/> </div>

The Status should be the next one filled out for this example. Certain fields bring up the magnifying glass which is necessary in order for the filter to work. Click it and make Status equal Present, because all persons in the building are automatically listed with a Status of Present.

The next section deals with which fields should be columns on your view. Select available fields and click Add. The Resident ID should be first as this is the clickable link to the Resident's profile. Ideal would be the first and last name as well as the suite. If this is a private view that you would not like to share with other users, check  Visible only to **me**. Click Save.

The view is now loaded with the proper filters and I can glance to see that I have 24 Residents currently in this community.

 GTA Current
[Edit](#) | [Delete](#) | [Create New View](#)

[New Resident](#)
[Change Owner](#)


[A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [Q](#) | [R](#) | [S](#) | [T](#) | [U](#) | [V](#)

<input type="checkbox"/>	Action	Resident ID ↑	First Name	Last Name	Suite	Move in Date	Community
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-10069</a>	Vicky	Smith	<a href="#">782</a>		iaRetirement - GTA
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-10081</a>	Dr. John	Adams	<a href="#">706</a>		iaRetirement - GTA
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-10353</a>	Joe	Smith	<a href="#">777</a>	5/30/2011	iaRetirement - GTA
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-11306</a>	Walt	Whithorne		1/4/2012	iaRetirement - GTA
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-11638</a>	Adam	Silva		2/18/2012	iaRetirement - GTA
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-12768</a>	Bill	Fobe	<a href="#">303</a>	5/9/2012	iaRetirement - GTA
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-12834</a>	Wilma	Fitzgerald	<a href="#">779</a>	5/23/2012	iaRetirement - GTA
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-12838</a>	Suzanne	Sommers	<a href="#">723</a>	5/26/2012	iaRetirement - GTA
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-12945</a>	Irene	Cosway	<a href="#">782</a>	9/14/2011	iaRetirement - GTA
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-12947</a>	Victor	So		5/28/2012	iaRetirement - GTA
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-13042</a>	Rob	Lang	<a href="#">609</a>	5/30/2012	iaRetirement - GTA
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-13089</a>	John	Adams	<a href="#">798</a>	5/30/2011	iaRetirement - GTA
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-13090</a>	Elaine	Adams	<a href="#">798</a>	5/30/2011	iaRetirement - GTA
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-14185</a>	John	Adams	<a href="#">705</a>	5/30/2011	iaRetirement - GTA
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-14186</a>	Elaine	Adams	<a href="#">705</a>	5/30/2011	iaRetirement - GTA
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-14187</a>	Karen	Lo	<a href="#">706</a>	7/24/2012	iaRetirement - GTA
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-14249</a>	Matt	Se	<a href="#">706</a>	8/7/2012	iaRetirement - GTA
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-14250</a>	Marry	Se	<a href="#">706</a>	8/7/2012	iaRetirement - GTA
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-14251</a>	Newton	Trial	<a href="#">1201</a>	8/7/2012	iaRetirement - GTA
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-14252</a>	Dorothy	Newton	<a href="#">1201</a>	8/7/2012	iaRetirement - GTA
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-14256</a>	Newton	Trial	<a href="#">1202</a>	8/7/2012	iaRetirement - GTA
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-14257</a>	Sarah	Trial	<a href="#">1202</a>	8/7/2012	iaRetirement - GTA
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-14650</a>	Vivian	Morgan	<a href="#">303</a>	9/6/2012	iaRetirement - GTA
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">R-15267</a>	Robert	Tse	<a href="#">3031</a>	9/27/2012	iaRetirement - GTA

1-24 of 24 ▾
0 Selected ▾
◀ Previous Next ▶
 Chat

To see more advanced reporting with two dependent variables, refer to the **Advanced Reporting Guide**.