DESIGNING REPORTS
# Table of Contents

## Add a Report
- Designing a Pivot Table ................................................................. 4
- Adding a Measure ........................................................................... 10
- Adding Fields as Dimensions (Rows & Columns) ....................... 12
- Adding a Calculated Measure ....................................................... 16
- How to combine Pivot Tables to avoid double-counting beneficiaries 21

## View a Report
- Viewing a Pivot Table .................................................................... 34
- Filtering a Pivot Table ................................................................... 37

## Edit a Report
- Editing a Pivot Table ...................................................................... 43

## Delete a Report
- Deleting a Pivot Table ................................................................... 54

## Export a Report
- Exporting a Pivot Table .................................................................. 57

## Share a Report
- Sharing a report ............................................................................ 60
- Publishing a report ......................................................................... 65
Add a Report
Designing a Pivot Table

The following section describes how to create a Pivot Table based on the data you have collected in ActivityInfo. You can select fields from your Forms and Subforms or use other Reports, add Measures and Dimensions and use Statistics to analyse them.

💡 The Pivot Tables you design are visible only to you.

How to create a Pivot Table

Navigate to the Report List page

- Click on "Reports" to navigate to the Report List page.
- Click on the "Add pivot table" button to navigate to the Pivot Report page.
Select the source(s) of the data for your Report

- During the first phase of the Pivot table design, you must select the source(s) of the data for the Pivot Table. These can be one or more Databases, one or more Folders, one or more Forms or other Reports. Depending on what you want to use as your source you can drill down the list to reach a specific Form or select all the contents available instead.
- To reach a specific Form, click on "Databases" to reveal the list of the available Databases and select the Database(s) that contains the Folder(s) or the Form(s) you want.
- If the Form belongs to a Folder, select the Folder from the list of Folders to reveal the list of Forms in it.
- Alternatively, to use the data of all the Databases, click on the Databases box to select all Databases.
- When you have selected all the sources you need click on the "Done" button.
In this example, the source of data is one specific Form that belongs to a Database.

In this example, the source of data is one specific Form that belongs to a Folder of a Database.
Add a Measure to the Pivot Table

To design a Pivot Table you first need to add a Measure to the Report. This is the actual Data Source for the Pivot Table and it must be a Quantity Field.

To do so you need to define a Data Source and a Statistic for the Measure.

The Data Source is the actual Quantity Field you want to use and the Statistic is the type (e.g. Count Distinct, Sum, Average etc.) of summary you want to show for the specific Quantity Field.

Follow the steps for adding a Measure to a Pivot Table.
Add a Field as a Row or as a Column

To make the results more detailed and easy to read you can add Dimension to the Pivot Table, by dragging and dropping fields to the Row and Column Panel.

Follow the steps for [adding a Field as a Row or Column to a Pivot Table](#).
Save and Name the Report

- Click on the "Save" button on the Reports toolbar and provide a Name for your Pivot Table.

- Your Pivot Table has been saved. You can view it in the Report List page.
Adding a Measure

The following section describes how to add a Measure to a Pivot Table and select which Statistic to show for it in order to start analyzing the data you have collected.

To design a Pivot Table you first need to add a Measure to it. This is the actual data source for the Pivot Table and it must be a Quantity field. You also need to define a Statistic for the Measure.

The Data Source is the actual Quantity field you want to use and the Statistic is the type (e.g. Count Distinct, Sum, Average etc.) of summary you want to show for the specific Quantity field.

How to Add a Measure

• After selecting the source of data you will use for the Pivot Table, select the field(s) you want to use as a Measure from the list of the fields on the Report Design side panel.
• Drag and drop the field to Measures.

• The Measure has been added and you can view it on the Pivot Table.
To select the Statistics to view for this Measure, click on the Measure to reveal the Statistic options and select the Statistics you want by ticking the boxes next to their names.

View the Statistics of the Measure on the Pivot Table.

In the Measures panel, you can also edit the name of the Measure or delete it.
Adding Fields as Dimensions (Rows & Columns)

The following section describes how to add a field as a Row and a field as a Column for the creation of a Pivot Table. These are the Dimensions of your Pivot Table and they make it more readable and detailed.

There are several options as to what to display for a Dimension, which can be added to add more detail to your Pivot table:

• Totals
• Missing Values
• Percentages

💡 You can add a vertical Dimension or a horizontal Dimension or both.

How to add a field as Row

• After selecting the source of data for the Pivot Table and adding a Measure to it, select the field you want to add as a horizontal Dimension to the Pivot Table from the list of fields in the Report Design side panel.
• Drag and drop the field to Rows.
The horizontal Dimension has been added and you can view it on the Pivot Table.

To select more options as to what to display, click on the Dimension you added to reveal the Display options and select the options you want by ticking the boxes next to their names.

View the new Display options on the Pivot Table.
In the Rows card, you can also edit the Label or delete the Dimension entirely.

How to add a field as Column

- Select the field you want to add as a vertical Dimension to the Pivot Table from the list of fields in the Report Design side panel.
- Drag and drop the field to Columns.

- The vertical Dimension has been added and you can view it on the Pivot Table.
To select more options as to what to display, click on the Dimension you added to reveal the Display options and select the options you want by ticking the boxes next to their names.

View the new Display options on the Pivot Table.

In the Columns card, you can also edit the Label or delete the Dimension entirely.
Adding a Calculated Measure

The following section describes how to add a Calculated Measure to a Pivot Table. Calculated Measures allow you to write advanced Formulas, using the Formula editor in order to produce more advanced results from your data analysis.

How to Add a Calculated Measure

- After selecting the source of data you will use for the Pivot Table, select the field(s) you want to use as a Measure from the list of the fields.
- Drag and drop the field to Measures.

💡 To create a Calculated Measure you need to have collected data. Calculated Measures can only be created with Quantity fields, Single Selection fields or Multiple Selection fields.

- The Measure has been added and you can view it on the Pivot Table.
• Click on " + Add calculated field".

• The Formula editor will appear.
Under Functions (left-hand side) you can view the Functions available.
Under Fields (right-hand side) you can view the Fields available.

- If the Formula is valid then the done button will be enabled.
- If the Formula is not valid then the done button will remain disabled.
- View the available functions in "Formulas".
• Click on "Done" when the Formula is valid.

<table>
<thead>
<tr>
<th>Required assistance</th>
<th>Measures</th>
<th>Female</th>
<th>Male</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social</td>
<td>Count of all records</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Social</td>
<td>IF((Required assistance).Social 9,0)</td>
<td>0</td>
<td>9</td>
</tr>
</tbody>
</table>

• To select the Statistics to view for this Measure, click on the Measure to reveal the Statistic options and select the Statistics you want by ticking the boxes next to their names.
• View the Statistics of the Measure on the Pivot Table.
In the Measures card, you can also edit the name of the Measure or delete it.
How to combine Pivot Tables to avoid double-counting beneficiaries

The following section describes how to use two Pivot Tables in ActivityInfo when you analyze the collected data to avoid double counting an indicator for an activity. It shows how to create a Pivot Table based on the data of another Pivot Table.

Double counting means counting the same person (e.g. beneficiary) reached by an organization more than once for example in the same reporting period or by more than one activity. Double counting inflates the count of people reached.

If for example you did a distribution of Food relief items to 200,000 beneficiaries and Non-food relief items to 300,000 beneficiaries in a population of 400,000 people, then adding up the beneficiaries of the two activities wouldn't be correct. Some beneficiaries got both types of items so they shouldn't be counted twice.

To avoid double counting a beneficiary when you are doing data analysis in ActivityInfo, you can use two Pivot Tables. One Pivot Table will show the MAX numbers for the indicators (i.e. beneficiaries) you have selected and the other Pivot Table will summarize these numbers.

You could for example first find the maximum number of beneficiaries reached by projects, by district, and then sum those districts together in a second pivot table to find the total by province.

The following example contains dummy data but is based on the real structure of Forms used for WASH activities by the Yemen WASH Cluster.

How to create a Pivot table using the MAX values of indicators

Before you start designing the Pivot Table, add Codes to the fields you want to use. This will make it easier to use them in the Formula editor.

Select the Resources

• Click on Reports to navigate to the Report List page and click on "Add pivot table".
Click on the arrows to reveal the contents of the Databases and Folders and tick the boxes next to the Resources you want to use to select them. When you are ready click on "Done".

In this example, we want to use the Records of a Monthly Subform which is used to collect information for Beneficiaries getting assistance under various Activities. The Activities are included in the Parent Form.

Add the Measures

Next, we can add our Measures and Dimensions. You can directly drag and drop your Quantity fields in Measures. But if you want to use a more advanced structure, you can use the Formula editor and add a Calculated field.

In this example, we want to add as Measures the Quantity fields of Beneficiaries reached (as reported in the Subform) for each Activity in our Form. To do this we will use a Calculated field.
Because the Records of the Beneficiaries belong to a Subform, we will navigate to the section where the fields of our Subform appear and we will click on "Add calculated field."

### Using a Formula for a calculated field

- In the Formula editor we will add the Formula which will allow us to bring in the **Total Number of Beneficiaries** for each **Activity**. The **Total Number of Beneficiaries** is a Quantity field and the **Activities** field is a Single Selection field.
- To make the Formula easier to create we have added Codes to every field in our Form. The Code for the Total Number of Beneficiaries in our Form is "BENE_TOTAL".
- The Code for the Activities is "Activity" plus the ID of each option in the Single Selection field.

The Formula in this example will be:

```
IF(Parent.Activity.ck2u7tw63a, BENE_TOTAL, 0).
```

This is an IF Formula that will bring as a result the Quantity that appears in the field with the Code "BENE_TOTAL" when the ID of the Activity is equal to "Parent.Activity.ck2u7tw63a". Otherwise, it will give as a result "0".
• To start writing the Formula, type in the Formula editor "IF(“. Then, click on the first option under the Activity field (in this case it would be "1. Provide operational support to water supply system"). Finish the Formula by typing ",0)"
• Click on "Done" when you are ready.

Add the 'MAX' statistic

• The first Measure has been added and you can view it in Measures.
• Give it representative name and from the statistics list deselect "Sum" and select "Max".
• This will give you the Maximum quantity available for this Measure.

💡 Read more about Formulas in ActivityInfo.
Add more Measures and apply the MAX statistic

- Let's add some more Measures in the same way.
- Navigate to the section where the fields of the Subform appear and click on "Add calculated field."
- In the Formula editor type the same Formula as before but instead of using the first option under the Activity field, use the second one. In this example, we would click on "2. Provide spare parts and maintenance for water supply systems".
- Click on "Done" when you are ready.
• You have successfully added another Measure. Give it a descriptive name in the Measure card, deselect the Sum Statistic and select the "Max" statistic to show the Max quantity available for this Measure too.

• Continue adding more Measures in the same way.
• In this example, we have added as a Measure the MAX number of Beneficiaries available for 4 different Activities.

Important!

You might want to get the SUM for a specific indicator instead of the MAX because you know for example that each Beneficiary must be counted. In that case instead of checking the MAX statistic, you should check the SUM statistic. This will show the SUM for that field instead of the MAX.

Add Rows and Columns

• Now let’s start designing the Pivot Table to make more sense out of our data.
• Drag and drop the fields you want to use as Dimensions to Rows. In this example we will use the Governorate, the District and the Month.
• Move the Measures to Columns.
• When you are ready click on "Save report" and give a descriptive name to your Pivot Table.
How to create a Pivot Table to sum the Max values of another Pivot Table

• After creating the Pivot Table which includes the MAX values of your indicators, navigate to the Report List page and click on "Add pivot table".

• We will now sum up the MAX values we got on the first Pivot Table.

• This time we will use as a Resource the Pivot Table we created.

• Click on "Reports" to reveal the available Reports and click on the Report you created to select it. When you are ready click on "Done".
• Drag and drop to Measures the fields that we created in the previous Pivot Table which show the MAX values for that Measures.
• Click on each Measure and make sure that in the Statistics, the "Sum" statistic is selected.

• Start designing the Pivot Table in the way you wish. In this example, we will add the Months and the Governorate in Rows.
• Make sure you move the Measures to Columns.
• Click on "Save report" and give a descriptive name to your Pivot Table.
• You can remove a Dimension to customize the Pivot Table to your needs.
• In this example, we will remove the Governorate. Click on it in and click on "Delete".

• The Governorate Dimension is removed and you can view the maximum values of the selected data summarized by Month.
• Finally, you can add a Calculated field to show the SUM of these values.
• Click on "Add calculated field" and write the Formula brings in the MAX for the Measures.

• Select SUM as a statistic.
• Give a descriptive name to the Measure and save your Report.
View a Report
Viewing a Pivot Table

The following section describes how to find and view a Pivot Table in the Pivot Report page to get an overview of the Records added to a Form or a Subform based on the selected Dimensions and Measures.

How to View a Pivot Table

- To view a Pivot Table, click on "Reports" to navigate to the Report List page.
- Click on the name of the Report to open it.

- Optionally, click on "Collapse" to collapse the Report Design side panel.
- View the Pivot Table in the Pivot Report page.

💡 You can also filter the Pivot Table using Categories to focus on a specific group of Records.
<table>
<thead>
<tr>
<th>Municipality Name</th>
<th>BvDataDriven</th>
<th>Ministry of Devel...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aa en Hunze</td>
<td>250</td>
<td>100</td>
</tr>
<tr>
<td>Aalten</td>
<td>210</td>
<td></td>
</tr>
<tr>
<td>Almere</td>
<td>200</td>
<td></td>
</tr>
<tr>
<td>Apeldoorn</td>
<td>120</td>
<td>80</td>
</tr>
<tr>
<td>Assen</td>
<td>250</td>
<td></td>
</tr>
<tr>
<td>Dantumadiel</td>
<td></td>
<td>100</td>
</tr>
<tr>
<td>Goes</td>
<td></td>
<td>230</td>
</tr>
<tr>
<td>Weert</td>
<td>60</td>
<td></td>
</tr>
</tbody>
</table>
Filtering a Pivot Table

The following section describes how to filter the Records you see in a Pivot Table using Categories on your Dimensions so as to view a specific group of information.

How to Filter a Pivot Table using Categories

Navigate to the Pivot Table

• Click on "Reports" to navigate to your Report List page.

• Click on the Report you want, to navigate to the Pivot Report page.
Filter the Pivot Table

Hide Categories

- Select the Category which you want to hide from the Pivot Table.
- Right click on the cell that contains it and click on "Hide this category".
You can repeat this for as many Categories as you want.

- The Categories you selected are hidden.
Unhide Categories

- To see which categories have been hidden, click on the "Show hidden" button.

- The hidden Categories will appear grayed out. To hide them again click on "Don't show hidden".
- To unhide a specific Category, right click on the category you want and click on "Unhide this category".
- To unhide all hidden Categories, right click on a cell and click on "Unhide all categories".
- To show only one specific Category, right click on the Category you want and click on "Show only this category".

<table>
<thead>
<tr>
<th>Municipality Name</th>
<th>BedDataDriven</th>
<th>Ministry of Development</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aa en Hunze</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>Aalten</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Almere</td>
<td>200</td>
<td></td>
</tr>
<tr>
<td>Apeeldoorn</td>
<td>0</td>
<td>80</td>
</tr>
<tr>
<td>Assen</td>
<td>250</td>
<td></td>
</tr>
<tr>
<td>Dantumadiel</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>Goes</td>
<td>230</td>
<td></td>
</tr>
<tr>
<td>Weert</td>
<td>60</td>
<td></td>
</tr>
</tbody>
</table>
Edit a Report
Editing a Pivot Table

The following section describes how to edit a Pivot Table to show different results, to change its name or to correct a mistake.

How to Edit a Pivot Table

Navigate to the Pivot Report page

• Click on "Reports" to navigate to the Report List page.
• Click on the Report you want to edit on the Reports list to navigate to the Pivot Report page.

Rename the Pivot Table

• Click on "Report settings" and click on "Rename report".
• Provide a new name for the Pivot Table and click on "OK" to save the new name.

• Click on "Save" to save the Pivot Table with the new name.

**Edit the Source(s) of the Data**

• To edit the source(s) of the data, click on the "Select forms" button on the Report Design side panel.
Select the new fields you want to use and click on the "Done" button to complete the change.
Edit a Measure

Edit the Measure Name

- Click on the Measure to open the Measure card editor.

- Edit the Measure Name by entering in the new name and click on the "Save" button on the Pivot Table toolbar to save the edit.

Edit the Measure Display options

- Click on the Measure to open the Measure card editor.
Edit the Measure Display options by checking the boxes that correspond to the Display options you want and click on the "Save" button to save the changed Report.

Replace a Measure

- Click on the Measure to open the Measure card editor.
• Click on the "Delete" button to remove the Measure.

• From the fields list, click and drag and drop the field you want to use in place of the removed Measure and click on the "Save" button to save the changed Report.
Edit a Dimension

Edit a Dimension Name

- Click on the Dimension you want to change (Row or Column) to open the respective card editor.

- Edit the Dimension Name by entering the new name for the Dimension and click on the "Save" button to save the changed Report.
Edit the Dimension Display options

- Click on the Dimension you want to change (Row or Column) to open the respective card editor.

- Edit the Dimension Display options by checking the boxes that correspond to the new Display options you want and click on the "Save" button to save the changed Report.
Replace the Dimension

- Click on the Dimension you want to change (Row or Column) to open the respective card editor.

- Click on the "Delete" button on the panel to remove the Dimension that you want to replace.
• From the fields list, click and drag and drop the field you want to use in place of the removed Dimension and click on the "Save" button to save the changed Report.
Delete a Report
Deleting a Pivot Table

The following section describes the steps for deleting a Pivot Table from your Reports. You might want to do this because the Pivot Table is no longer valid, is incorrect or a duplicate.

⚠️ If you delete a Pivot Table it will be permanently removed from the system. Instead of deleting it, you might want to edit the Pivot Table.

How to delete a Pivot Table

- Navigate to the Report List page.
- Click on the Report with the Pivot Table you want to delete to navigate to the Pivot Report page.
- Click on "Report settings" to reveal the drop-down menu and click on "Delete report".
- Click on "OK" on the pop-up message to confirm the deletion.
• The Report with the Pivot Table has been deleted.
Export a Report
Exporting a Pivot Table

The following section describes how to export a Pivot Table from ActivityInfo to a CSV file.

How to Export a Pivot Table

• Click on "Reports" to navigate to the Report List page.
• Click on the Report to open it.

• Click on the "Export" button to export the Pivot Table.
• The Pivot Table will automatically start downloading as a .CSV file.

• Click on the file to open it.
<table>
<thead>
<tr>
<th>Region</th>
<th>Measures</th>
<th>BeDataDriven</th>
<th>Default</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central</td>
<td>Number of Students Registered</td>
<td>100</td>
<td></td>
</tr>
<tr>
<td>Central</td>
<td>Number of Students completing camp</td>
<td>75</td>
<td></td>
</tr>
<tr>
<td>North</td>
<td>Number of Students Registered</td>
<td>100</td>
<td>190</td>
</tr>
<tr>
<td>North</td>
<td>Number of Students completing camp</td>
<td>85</td>
<td>160</td>
</tr>
<tr>
<td>South</td>
<td>Number of Students Registered</td>
<td>120</td>
<td></td>
</tr>
<tr>
<td>South</td>
<td>Number of Students completing camp</td>
<td>90</td>
<td></td>
</tr>
</tbody>
</table>
Share a Report
Sharing a report

The following section describes how to share a report with other users in your Database.

Once you design a report you can share it with other users who have been added in your Databases. You can share a Report with users based on their assigned Role in the Database.

The report will be automatically updated as data are updated.

To be able to share a report you must be the Database owner or to have been assigned the 'Share reports' permission.

When you share a report with other users, they will be able to view and export the report but they will not be able to save changes to the original report, nor rename or delete it. However, they will be able to do edits and save a copy of the report and work on the copied report instead.

Also, when a report is shared with users, users cannot share or publish that report, even if they have permission to share and publish their own reports.

To be able to view the data displayed in the report, users must have been assigned to the resources (Folders, Forms) that are used in the report.

So for example, if you design a report using Records added to "Form A" and you share the report with all users that have the Role "Data Entry" in the Database, a user that has no access to "Form A" will be able to view the report in the Report List page but the report won't include any visible data when opened.

💡 You can stop sharing a report anytime.

Database owners will be able to view all shared reports in the database in the Reports List page.

⚠️ For Databases added before August 3, 2020 the 'Share reports' permission must be manually assigned to Roles via the Roles section.

For Databases added from that date onward the following stands for each Database template:

- **Blank database template**: the Role of Administrator will have both the 'Share reports' and 'Publish reports' permission
• Multi-partner reporting database template: the Role of Administrator will have both the 'Share reports' and 'Publish reports' permission

• Case management database template: the Role of Administrator will have the 'Share reports' permission.

⚠️ The 'Share reports' permission cannot be granted on a per resource or a per user basis.

How to share a report

• To share a report, click on "Reports" to navigate to the Report List page.
• Click on the name of the report to open it.

• Optionally, click on "Collapse" to collapse the Report Design side panel.
• Click on "Sharing & Publishing" to reveal the drop-down menu.

• In the Sharing tab check the boxes that corresponds to the Roles of the Databases with which you want to share this report.
If you use data from more than one Database and you want to share the report with the users of the additional Databases, make sure to check the boxes for the Roles in these Databases as well.

To stop sharing a report uncheck the boxes. When you uncheck the boxes the report will be removed from the Report List page of the users that was it was shared with.

- The report is now shared with the users that have been assigned the selected Roles and they will be able to view it in the Report List page.
# Reports

[Add pivot table]

<table>
<thead>
<tr>
<th>Pivot Table</th>
<th>Shared with me</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost efficiency</td>
<td></td>
</tr>
<tr>
<td>Kits distribution by date and partner</td>
<td></td>
</tr>
</tbody>
</table>
Publishing a report

The following section describes how to publish a report and use it outside ActivityInfo.

Once you design a report you can share it with other users who are have been added to your Databases or publish it so that people outside ActivityInfo can see it.

The report will be automatically updated as data are updated.

To be able to publish a report you must be the Database owner or to have been assigned the 'Publish reports' permission.

When published, a read-only version of the report will be available as:

- Standalone webpage
- Embeddable HTML snippet

We recommend paying special attention to the data included in a report that you publish as well as to the users assigned with the 'Publish reports' permission.

You can unpublish a report anytime.

⚠️ For Databases added before August 3, 2020, the 'Publish reports' permission must be manually assigned to Roles via the Roles section or manually granted to specific users via the user management section.

For Databases added from that date onward the following stands for each Database template:

- **Blank database template**: the Role of Administrator will have both the 'Share reports' and 'Publish reports' permission
- **Multi-partner reporting database template**: the Role of Administrator will have both the 'Share reports' and 'Publish reports' permission
- **Case management database template**: the Role of Administrator will have the 'Share reports' permission only.

How to publish a report

- To publish a report, click on "Reports" to navigate to the Report List page.
• Click on the name of the report to open it.

• Optionally, click on "Collapse" to collapse the Report Design side panel.

• Click on "Sharing & Publishing" to reveal the drop-down menu.
• Click on "Publishing" to open the Publishing tab.
• Click on "Publish now" to publish the report. You can read more details about what will be published in the Publishing tab.

• The link to the published report has been created and is published. To preview the report click on "Preview".
• To copy the URL to use it somewhere else click on "Copy URL" under the type of report you want to use.
• The report is now published and you can share the link to it with people who are not users in ActivityInfo.
To stop a report from being public, click on "Unpublish".

To publish a Bar Chart in place of a Pivot Table, click on 'Show as pivot table' and select 'Show as bar chart', save the report and copy the URL or code of that report from the Publishing tab.