



Novi Reports



SUMMIT

Presented by **NOVI** AMS

Association Analytics

Sponsor Introduction



Mark Lowry
President and CRO



Travis Osterhout
Solutions Advisor



SUMMIT

Presented by **NOVI** AMS

Association Analytics

Sponsor Introduction



Scan this QR code to find out
**4 Ways to Expand the Value of Your
AMS with Analytics!**



SUMMIT

Presented by **NOVI** AMS



Four Ways to Pull Data

Reports

- List Views
- System Reports
- QuickBooks
- Custom Reports





List Views

Data Where You Work



SUMMIT

Presented by **NOVI** AMS



System Reports

Specialized Data, Often Over Time



SUMMIT

Presented by **NOVI** AMS



QuickBooks Reports

Financial Data



SUMMIT

Presented by **NOVI** AMS



Custom Reports

Very Specific,
as of Today.



SUMMIT

Presented by **NOVI** AMS

Custom Reports





Custom Reports

The screenshot displays the Microsoft SQL Server Management Studio interface. The main window shows a SQL query being executed. The query is designed to generate a list of member-initiated signups, categorized by quarter and formatted dates. The query uses a Common Table Expression (CTE) named 'Quarters' to define the start and end dates for each quarter. The main query then selects distinct system users from the 'AppSystemUsers' table, joining it with the 'FormattedDates' table to produce the final report data.

```
1  /*
2  *   MEMBER INITIATED SIGNUPS
3  */
4  ;WITH Quarters( date ) AS
5  (
6  SELECT DATEADD(QUARTER, DATEDIFF(QUARTER, 0, GETDATE()) + -24, 0)
7  UNION ALL
8  SELECT DATEADD(QUARTER, 1, date)
9  FROM   Quarters
10 WHERE  DATEADD(QUARTER, 1, date) <= EOMONTH(DATEADD(QUARTER, DATEDIFF(QUARTER, 0, GETDATE()) + 0, 0))
11 ),
12   FormattedDates( FormattedQuarter, QuarterYear, QuarterPart, QuarterStartDate, QuarterEndDate ) AS
13 (
14 SELECT  CONCAT(FORMAT(Q.date, 'yyyy'), '-Q', DATEPART(QUARTER, Q.date))      AS FormattedQuarter,
15         FORMAT(Q.date, 'yyyy')                                             AS QuarterYear,
16         DATEPART(QUARTER, Q.date)                                         AS QuarterPart,
17         DATEADD(QUARTER, DATEDIFF(QUARTER, 0, Q.date), 0)                AS QuarterStartDate,
18         DATEADD(DAY, 0, DATEADD(QUARTER, DATEDIFF(QUARTER, 0, Q.date) + 1, 0)) AS QuarterEndDate
19 FROM    Quarters AS Q
20 ),
21   AppSystemUsers( SystemNames ) AS
22 (
23 SELECT  DISTINCT
24         *
25 FROM
```



Anatomy of a Custom Report

2 Parts

- What are you looking for?
(Conditions)
- What fields do you want to show?
(Columns to Display)





Report Conditions

Person Vs Company

New Membership Report

***Name** **Report Category**

Conditions

[AND] + ADD RULE + ADD GROUP

⋮ General Info > Is a Person equal Yes No Delete



Report Conditions Not Deleted

New Membership Report

***Name** **Report Category**

Conditions

[AND] + ADD RULE + ADD GROUP

⋮ General Info > Active in QuickBooks Online equal Yes No Delete



Report Conditions

And vs Or

New Membership Report



*Name

Report Category

Conditions

[AND]

]OR[

+ ADD RULE

+ ADD GROUP



Contact Info > Billing Address > State Province

equal

Florida

Delete



Contact Info > Billing Address > State Province

equal

California

Delete



Report Conditions

State vs St

New Membership Report

***Name**

Report Category

Conditions

[AND] [OR]

+ ADD RULE + ADD GROUP

☰	Contact Info > Billing Address > State Province	equal	FL	Delete
☰	Contact Info > Billing Address > State Province	equal	Florida	Delete



Report Conditions

Designated Vs Effective

New Membership Report

*Name

Report Category

Conditions

[AND]

[OR]

+ ADD RULE

+ ADD GROUP



Member Type Info > Member Type (Effective) > Name

equal

Delete



Member Type Info > Member Type (Designated) > Name

equal

Delete



Report
Conditions

Drop Downs

Conditions

[AND]

Custom Fields > [blurred] Committee ▼ contains 2019

The screenshot shows a 'Conditions' configuration panel. At the top, there is a blue button labeled '[AND]'. Below it, a condition is defined: a dropdown menu is set to 'Custom Fields > [blurred] Committee', followed by the operator 'contains' in another dropdown, and the value '2019' in a text input field.



Report Conditions

People who work for a parent company that...

New Membership Report

***Name**

Report Category

Conditions

[AND] | [OR]

+ ADD RULE + ADD GROUP

⋮	General Info > Is a Person	equal	<input checked="" type="radio"/> Yes <input type="radio"/> No	Delete
⋮	General Info > Active in QuickBooks Online	equal	<input checked="" type="radio"/> Yes <input type="radio"/> No	Delete
⋮	Parent Info > Name	begins with	<input type="text" value="Acme"/>	Delete



Report Conditions

Members who were current as of 12/31/22...

New Membership Report

*Name

Report Category

Conditions

[AND] | [OR]

+ ADD RULE + ADD GROUP

☰	General Info > Is a Person	equal	<input checked="" type="radio"/> Yes <input type="radio"/> No	Delete
☰	General Info > Active in QuickBooks Online	equal	<input checked="" type="radio"/> Yes <input type="radio"/> No	Delete
☰	General Info > Member Since	less or equal	12/31/2022 12:00 am	Delete
☰	General Info > Membership Expires	greater	12/31/2022 12:00 am	Delete



Report Conditions

Members who were current as of 12/31/22...

Edit Membership Report

***Name** PZ Test - Can delete **Report Category** --Select a Report Category--

Conditions

[AND] [OR]

+ ADD RULE + ADD GROUP

General Info > Is a Person	equal	<input checked="" type="radio"/> Yes <input type="radio"/> No	Delete
General Info > Active in QuickBooks Online	equal	<input checked="" type="radio"/> Yes <input type="radio"/> No	Delete
General Info > Member Since	less or equal	12/31/2022 12:00 am	Delete
General Info > Membership Expires	greater	12/31/2022 12:00 am	Delete

Report Conditions

Available Fields

Novi Custom Report Available Fields

See a full list of available fields that can be queried (used as a report condition) & displayed (in a report column) in custom reports.



Written by Melanie Dupont
Updated over a week ago

As you've probably noticed, Novi's custom reporting engine can be a powerful tool for finding exactly the information you're looking for. With close to 2,000 fields available across three different types of reports, admin users can find records that meet incredibly specific criteria and show detailed information for the records shown.

If you'd like to see a full list of all available report columns, please download the Excel files below.

[Membership Report Columns](#)

[Event Attendance Report Columns](#)

[Event Management Report Columns](#)

[All Novi Report Columns \(Three Tabs\)](#)

Report Conditions

Help!

New Membership Report



*Name

Report Category

--Select a

Conditions

[AND] [OR]

General Info > Is a Person equal Yes No

General Info > Active in QuickBooks Online equal Yes No

Parent Info > Name begins with Acme

Display Settings


*Columns to Display Click & drag to reorder; click the X to delete a column.

Columns to Group By Click & drag to reorder; click the X to delete a column.

Columns to Sum

Columns to

Novi AMS



We'll be back online tomorrow

Got questions? The Novi team is here to help!

Powered by Intercom

Please Help!





Report Conditions

Help!



Powered by Intercom

s to

Please Help! I'm stuck on this report. I'm trying to pull A, B, and C. However, it's showing X and Y. What should I change?



<https://experience.noviams.com/admin/reporting/report-list>

THANK YOU TO OUR 2023 SPONSOR PARTNERS



SUMMIT

Presented by **NOVI** AMS