

**CIVICON LONDON**



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# Creating a Custom Report Template

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# Background

- [civicrm.org/node/386](http://civicrm.org/node/386) CiviCRM > Drupal Views
- [en.flossmanuals.net/civicrm/ch064\\_reports/](http://en.flossmanuals.net/civicrm/ch064_reports/)
- [www.booki.cc/civicrm-4/reports/](http://www.booki.cc/civicrm-4/reports/)
- [wiki.civicrm.org/confluence/display/CRMDOC/CiviReport+Reference](http://wiki.civicrm.org/confluence/display/CRMDOC/CiviReport+Reference) references..
  - [alastaira.wordpress.com/2011/03/17/civicrm-creating-a-custom-report/](http://alastaira.wordpress.com/2011/03/17/civicrm-creating-a-custom-report/) by Alistair Aitchison
  - [artfulrobot.com/civicrm-custom-birthdays-report](http://artfulrobot.com/civicrm-custom-birthdays-report) by Rich Lott

# Approach and Skills Required

- create one or more views in the database
  - familiarity with SQL query syntax
  - CiviCRM database structure
- create a PHP program to read & format the view
  - some knowledge of PHP to create the report template
  - associated template (.TPL) file
  - upload them to the server file system
- register report template in CiviReport
  - CiviCRM Administration menu

# Skills required

- You are like me if you -
  - are technically literate
    - know your way around a file system
    - done some scripting / programming
  - know a little bit about databases
    - are not afraid of trying things, eg SQL
  - are comfortable in a Windows environment
  - are phobic of Linux command shell 😞

# MySQL View

contact_id	contact_type	sort_name	job_title	membership_type_id	membership_type	membership_status_id	membership_status	event_id	role	event_type_id	event	start_date	count
153	Individual	Barkley, Kiara	NULL	2	Student	1	New	NULL	NULL	NULL	NULL	NULL	0
164	Individual	Blackwell, Nicole	NULL	1	General	3	Grace	NULL	NULL	NULL	NULL	NULL	0
142	Individual	Deforest, Esta	NULL	1	General	1	New	NULL	NULL	NULL	NULL	NULL	0
41	Individual	Dimitrov, Andrew	NULL	1	General	3	Grace	NULL	NULL	NULL	NULL	NULL	0
161	Individual	Dimitrov, Kacey	NULL	1	General	3	Grace	NULL	NULL	NULL	NULL	NULL	0
125	Individual	Dimitrov, Scarlet	NULL	2	Student	1	New	3	NULL	3	Rain-forest Cup Youth Soccer Tournament	2014-01-18 07:00:00	1
37	Individual	González, Alexia	NULL	1	General	1	New	NULL	NULL	NULL	NULL	NULL	0
118	Individual	González, Justina	NULL	2	Student	4	Expired	2	NULL	5	Summer Solstice Festival Day Concert	2013-06-17 12:00:00	1
80	Individual	Ivanov, Nicole	NULL	2	Student	1	New	NULL	NULL	NULL	NULL	NULL	0
106	Individual	Jacobs, Alida	NULL	2	Student	1	New	1	NULL	3	Fall Fundraiser Dinner	2013-12-18 17:00:00	1
169	Individual	Jacobs, Elbert	NULL	2	Student	1	New	NULL	NULL	NULL	NULL	NULL	0
67	Individual	Jacobs, Winford	NULL	1	General	1	New	NULL	NULL	NULL	NULL	NULL	0

# Prettied up as a Report

## Members and Events Attended



▸ Report Criteria

▸ Report Settings

Print Report

PDF

Export to CSV

- select group -



Add these Contacts to Group

Type	Member	Job Title	Membership Status	Role	Event	Event start date	Count
	Barkley, Kiara		New				0
	Blackwell, Nicole		Grace				0
	Deforest, Esta		New				0
	Dimitrov, Andrew		Grace				0
	Dimitrov, Kacey		Grace				0
	Dimitrov, Scarlet		New		Rain-forest Cup Youth Soccer Tournament	2014-01-18 07:00:00	1
	González, Alexia		New				0

# Example to Illustrate

- CiviMember, CiviEvent
  - which members attended which events?
  - may have attended none, one or many events
  - export to Excel for further analysis, eg pivot-table
- create
  - two views
  - one PHP program + template
- sample data
  - BitNami distribution [bitnami.com/stack/civicrm](http://bitnami.com/stack/civicrm)

# Summary and further reading

- real-life example, from a client
  - approx. one day's work
- handouts
  - [qualitytime.co.uk/content/creating-custom-report-members-and-events-attended](http://qualitytime.co.uk/content/creating-custom-report-members-and-events-attended)