Lighthouse Guide 4: Managing Reports

Reports in Lighthouse allow you to filter and present sub-sets of data within a tab or sub-tab. Want a list of members? A report is how you get it. Want to know who donated this month? Yep, that's a report too.

Using reports effectively can make a huge difference to how much time you need to spend getting data out of Lighthouse.

For those of you more familiar with Connect, think of a report like a saved search. Every time you run it, you'll get the results of that report as the data stands run for you.

Contents

Permissions Required

	View	Edit	Create
View Reports	✓		
Edit Reports		✓	
Create Reports			✓

Viewing Reports

The first thing to do when you need to look for a specific type of data is to take a look to see if a report already exists. The classic example of this is the "All Current Members" report, which allows you to easily run a list of all members

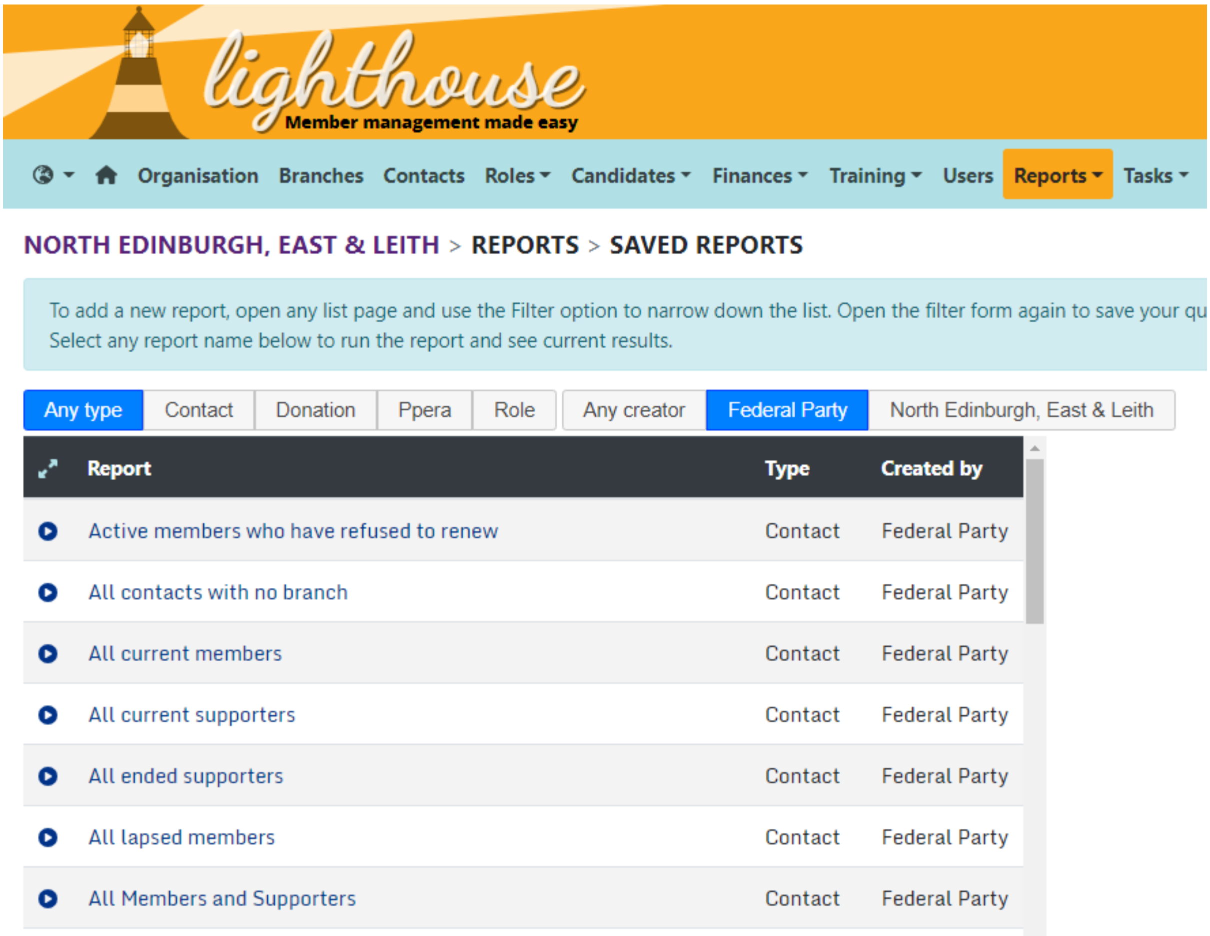
Lighthouse Guide 4: Managing Reports

Step 1

To access reports, log into Lighthouse and click on the “Reports” tab. You’ll need at least view reports access for this to appear.

Step 2

You should now see the reports list view. This will give you a list of all reports as well as two ways to filter available reports.



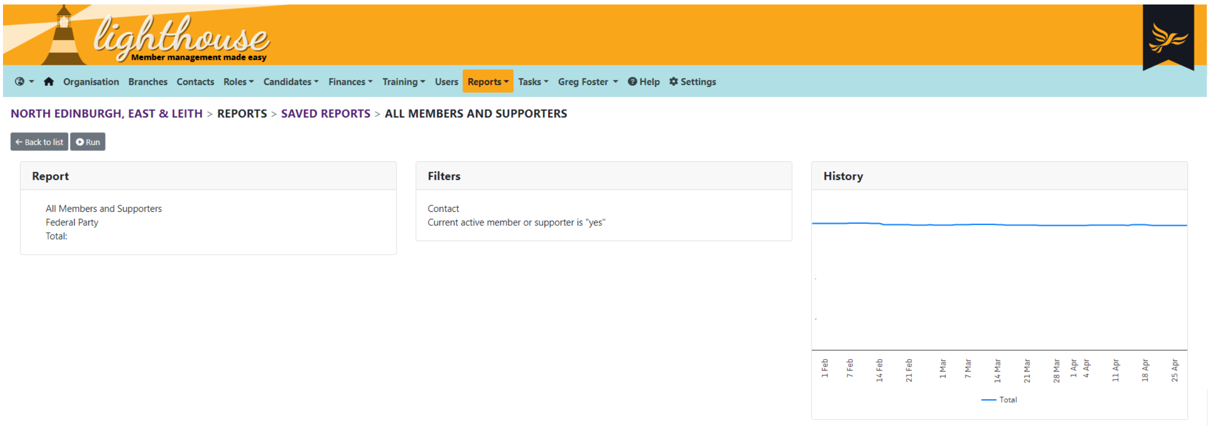
Using the menu in the top left, you can filter reports by the type of information that you’re looking for and on the right, you can filter by who created the report.

Each report then comes with a simple name explaining what it contains.

For this example, we’re going to open the “All Members and Supporters” report, which contains all members and supporters in your organisation. You can do this by clicking the report name.

You can also run the report instantly by clicking the play link button.

Step 3



Clicking on the report name brings you to the report record page. On this page, you'll see the name, who created the report and how many records are in it currently. You'll also see a quick explanation of who is in the filter and a graph of the trend over time for this report.

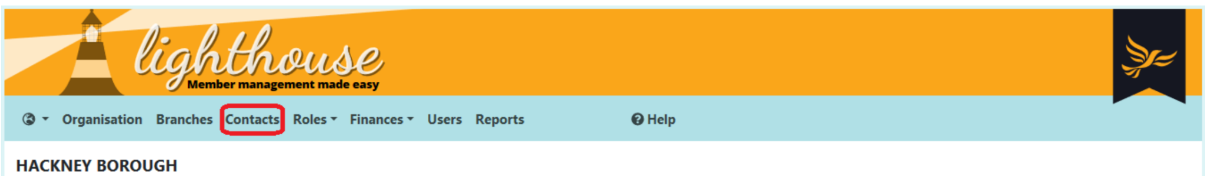
If you now click the "Run" action button, you list will load (you can skip this screen by clicking "Run" from the Reports list view.

Creating reports

Reports can be created in most tabs or sub-tabs on Lighthouse. For this example, we're going to create one of the most common report types, a contact report.

Step 1

If you're starting from this step, start by logging into Lighthouse. Once you've done that, click on "Contacts" to go to the Contacts tab.

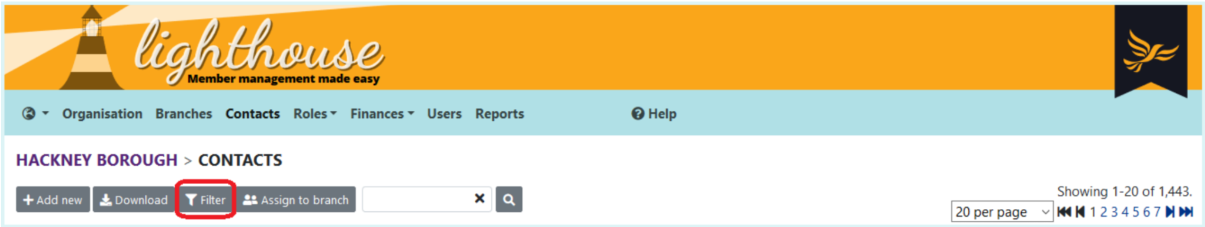


Step 2

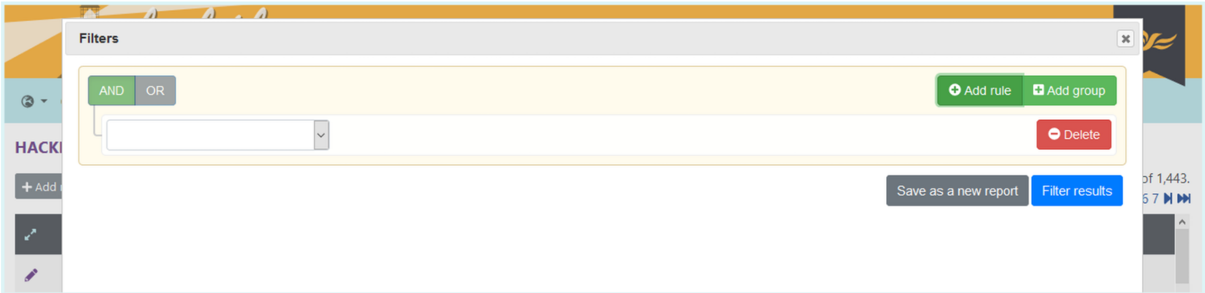
Once that has loaded, you'll be able to see the Contacts list view. From here, you can view a list of all contacts - that is, members, supporters, and donors - for your local party.

Lighthouse Guide 4: Managing Reports

To create a contact report, click the "Filter" button at the top left of the page.



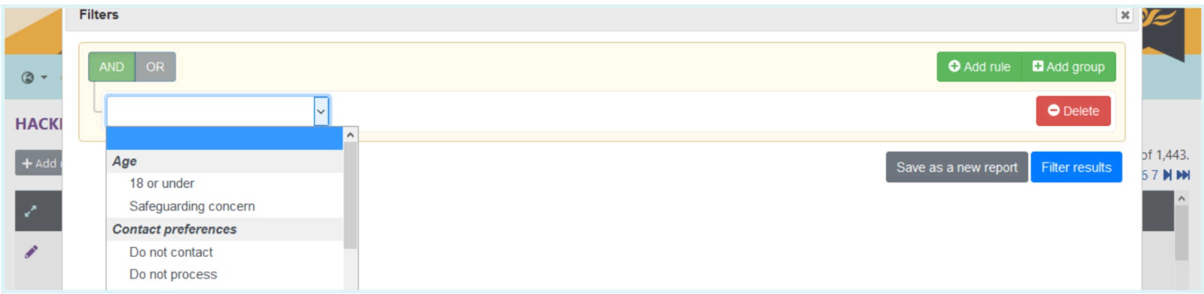
A pop-up window will appear:



Step 3

Next, you will need to create a series of "rules" for Lighthouse to follow, which allow it to select the correct people from your contact list.

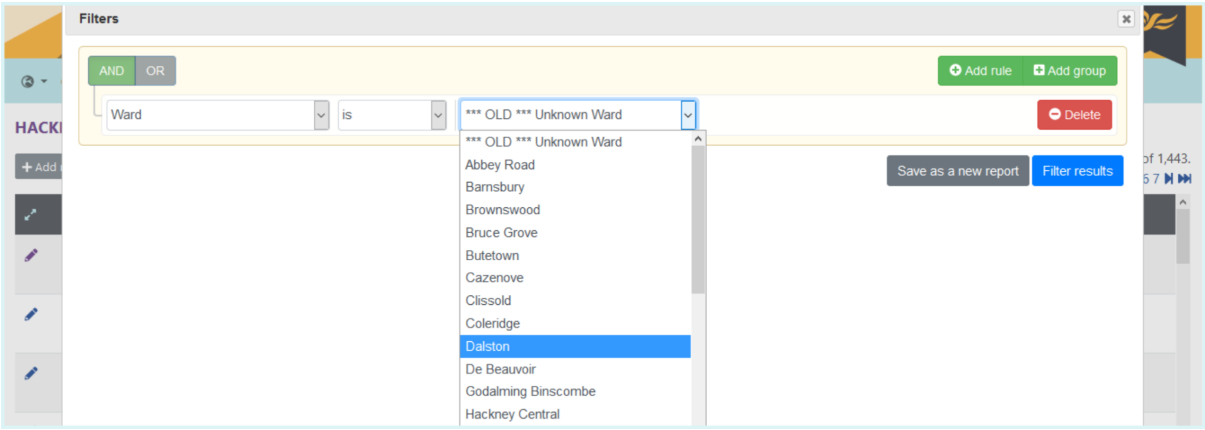
Click into the drop-down list (located underneath the green "AND / OR" buttons) and select a group of contacts you want to include in your contact report.



As an example, let's say you want to make a report showing all contacts in Dalston ward.

Step 4

Select "Ward" from the first drop-down menu, then choose the ward from the drop-down menu which appears.



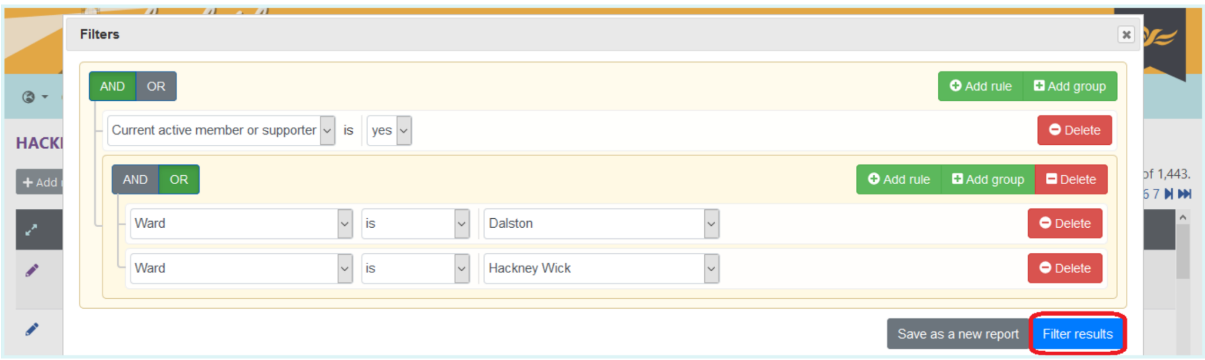
Step 5

If you want to make your report more specific, you can add additional rules by clicking "Add rule" or "Add group" at the top right of the screen and repeating the process in steps 3 and 4.

For example, in the image below you can see the rules you would need to create a report of all active members in Dalston or Hackney Wick. This is telling Lighthouse to:

- Filter your contacts so that the report only shows the group of current active members
- Then filter that group so that it shows only those current active members living in Dalston or Hackney Wick

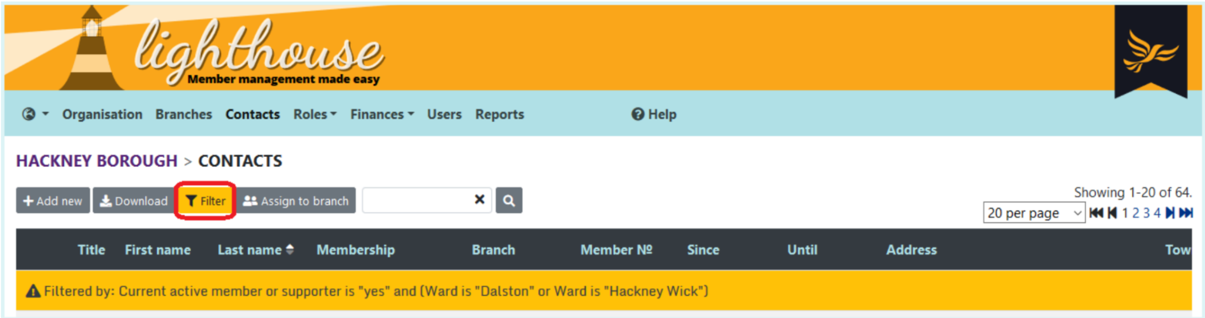
Remember to select the correct AND / OR options here - otherwise you may end up with no data in your report. In this example, a report of all current active members living in Dalston and Hackney Wick would be empty, as each contact can only live in one ward.



When you are happy with your filters, click "Filter results".

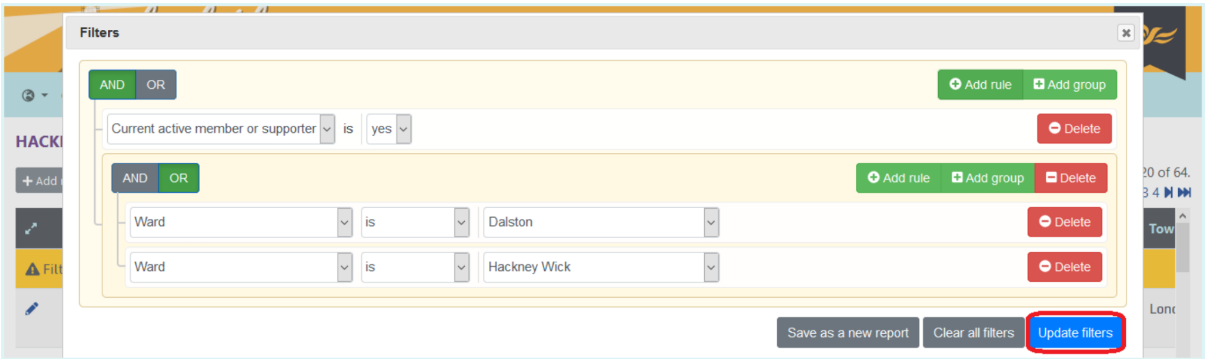
Step 6

A filtered list of your contacts will appear. If you would like to change your filters, click again on the “Filter” button at the top of the screen. You can then edit your filters within the pop-up menu.



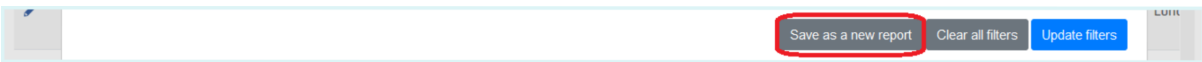
Step 7

Once you have finished updating your filters, click “Update filters” to view your contact report again.



Step 8

You can save your report in order to view it again at a later date. To do this, click “Save as a new report”.

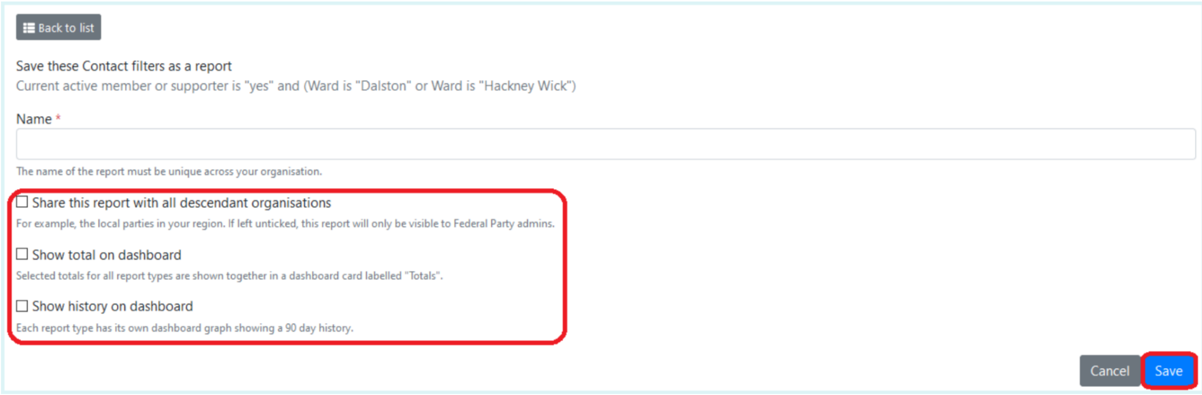


Step 9

You will then need to type a name for your report. Depending on the type of data in your report, you may also be given three options to choose from:

- Share this report with all descendant organisations - gives access to all organisations below yours in the hierarchy, for example all the local parties in your region (if left unticked, your report will only be visible to Federal Party admins)
- Show total on dashboard - selected totals for all report types are shown together in a dashboard card labelled "Totals"
- Show history on dashboard - each report type has its own dashboard graph showing a 90 day history

For more information about adding report data to your dashboard, [click here](#).



Once you have completed all the relevant fields, click “Save”. You can view your saved reports in the Reports tab - click here to find out more.

How to create other types of reports

You can now use Lighthouse to create reports covering data other than your contacts. You can now create reports about:

- Member roles
- Donations
- Pledges
- Loans
- Election expenses

The process followed is identical to the one you would use to create contact reports, and is the same for all the types of reports listed above.

Managing reports

From time to time, you might need to update old reports to make sure they’re showing the correct data.

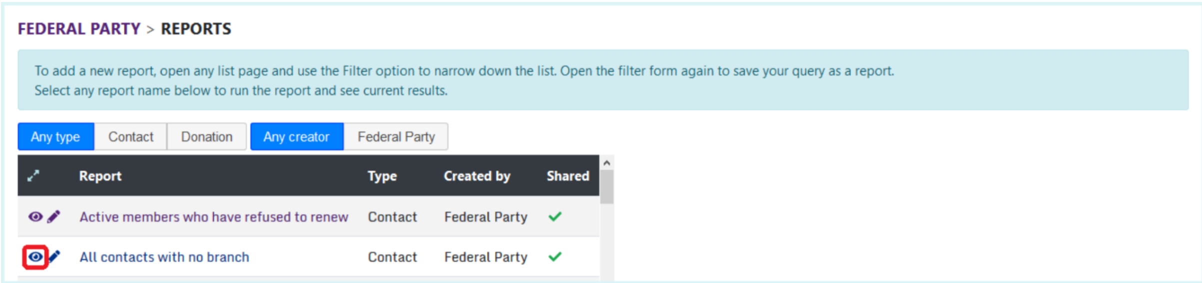
Lighthouse Guide 4: Managing Reports

To start with, you need to follow the steps in Viewing Reports and get yourself onto the Reports page.

How to edit your saved reports

Step 1

From the reports page, where you will see a list of your saved reports. To edit a report, click on the pencil icon to the left of the report name.



Note that you can also edit a report by clicking on the eye icon to the left of the pencil icon. This will take you to the details page for your chosen report - click on “Edit” at the top-left of the page.

Step 2

This will then take you to the relevant tab or sub-tab with the report loaded. To make changes to the report, open the filter tab and follow the steps listed in Creating Reports to change a filter.

When you have finished editing, click “Update [Report name]” in the Flters tan and you will be directed to the details page for your chosen report.

You can also save a report as new, if you need to retain both versions.

You can also then rename your report on the screen you are directed to after saving your changes, if you want to.

How to download data from Lighthouse

When you are using Lighthouse, you may notice that some pages offer the option to download the data shown on the screen.

Lighthouse Guide 4: Managing Reports

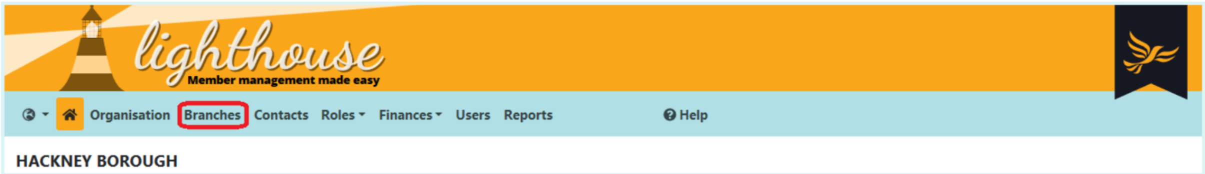
This is intended to enable you to produce mailings or do more complex analysis. Please remember that you should always practice download, use, delete with any data you download from Lighthouse and you should not retain it long-term outside of the system.

Note that all downloads will be in Excel and CSV format.

This guide will use a download of Branches data as an example. However, the process for downloading all the types of data listed above will be identical to this.

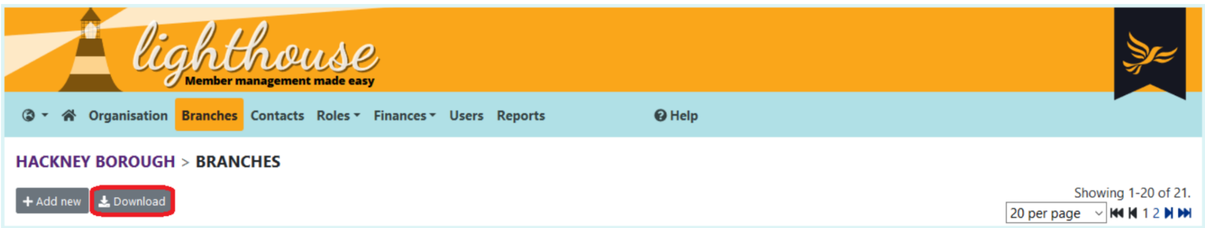
Step 1

Click on the Branches tab in the navigation bar.



Step 2

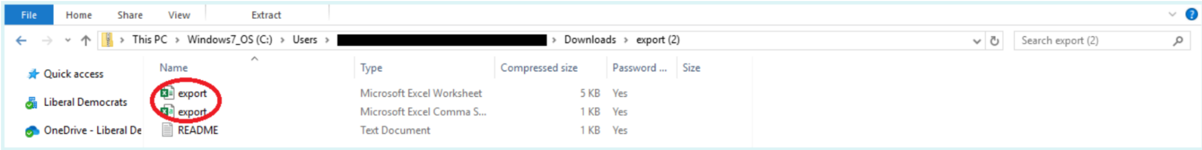
This will load the branches page. Here you can see a list of all your local branches, as well as membership statistics for each one. To download this information, click “Download” at the top left of the page. Note that you can download data any time you see this button in Lighthouse.



Step 3

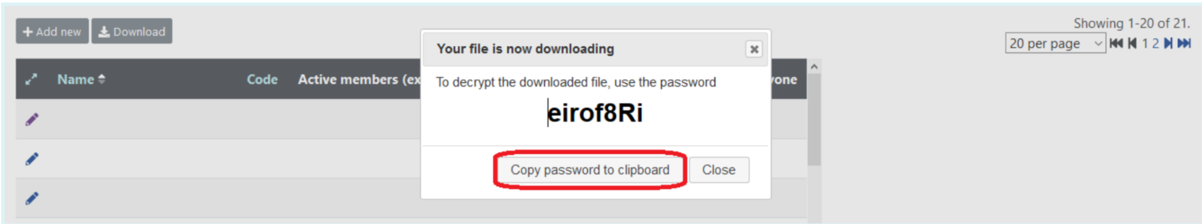
Locate the downloaded file in the file explorer on your computer. It is likely to have been downloaded to the “My Downloads” folder unless you have changed this option in your browser settings, and will be named “export.zip”.

Double click to open the zipped folder, and you will see three files - an Excel spreadsheet, a CSV file, and a text README file. Note that if your download contains a very large amount of data, you may not receive the Excel file.



Step 4

Due to the personal nature of the data being handled by Lighthouse, you will be asked to enter a password when you open the data file. In order to find the password, return to your browser. The password for your files will have appeared in a pop-up box on the screen, along with a button to copy it. Paste the password when prompted and you will be able to view your downloaded data.



Related Guides & Geek Sheets

Reports are useful across almost every other area of Lighthouse, so it's hard to narrow it down to just a few related Guides or Geek Sheets!

If you want to know more about the more complex ways in which you can use reports, we suggest checking out:

- Process Guide 1: Using Lighthouse to Fundraise
- Process Guide 3: Membership Data Reconciliation