

Wikimedia Cucumber Documentation

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Report Settings

General Settings

Report Title: Copy of Donor Report (Summary)

Report Description: Shows contribution statistics by month / week / y

Report Header: <html><head><title>CiviCRM Report</title><style type="text/css">@import url(https://civicrm.wikimedia.org/sites/all/modules/civicrm/css/print.css);</style></head></html>

Report Footer: <p></p></div></body></html>

Email Delivery Settings

Subject: [text field]

To: [text field]

CC: [text field]

Other Settings

Include Report in Navigation Menu? All report instances are automatically included in the Report Listing page. Check this box to also add this report to the navigation menu.

Parent Menu: Reports

Permission: CiviReport: access CiviReport

ACL Group/Role: administrator

Home - CiviCRM - CiviReport

Find contribs WMF Benefactors Page WMF Donation Page

Create New

Recent Items

abrownelli@giantrabbit.com

My Contact Dashboard

New Individual

First Name: [text field]

Last Name: [text field]

Email: [text field]

Save

CiviCRM Reports

My Reports

Report Name	Description	Actions
Email Addresses Grouped by Date (test report)	Shows contribution statistics by month / week / year .. country / state .. type.	View in CiviCRM, Edit Criteria, Edit Settings, Export as csv, Delete, Print to PDF, View as bar graph, View as pie chart, Add Contacts to Group
Donations by State (UT, OH, OR)	Shows contribution statistics by month / week / year .. co	
Major Gift Summary Report (by Restricted/Unrestricted)	This report show gifts over \$1,000 that have come in this by whether they are restricted or unrestricted.	
Donor Report (Detail)	Lists detailed contribution(s) for one / all contacts. Cont points to this report for specific details.	

Contribution Reports

Report Name	Description	Actions
Global Collect 10/31/12-12/14/12	Gateway Reconciliation	
Gateway FR2013 1st half	July - dec 2013	
Donor Report (Summary)	Shows contribution statistics by month / week / year .. country / state .. type.	
Donor Report (Summary)	Shows contribution statistics by month / week / year .. country / state .. type.	
Donations by Country (yesterday)	Shows contribution statistics by month / week / year .. country / state .. type.	
Donations by Country (today)	Shows contribution statistics by month / week / year .. country / state .. type.	
Multiple Donations	Shows contribution statistics by month / week / year .. country / state .. type.	
Donor Report (Summary)	Shows contribution statistics by month / week / year .. country / state .. type.	
Email Addresses Grouped by Date (test report)	Shows contribution statistics by month / week / year .. country / state .. type.	
Donations by State (UT, OH, OR)	Shows contribution statistics by month / week / year .. country / state .. type.	

Feature: My Reports section on the CiviCRM Report Listing page

As a member of the fundraising team,

I want to see reports I create at the top of the CiviCRM Report Listing page,

So that I can find more quickly reports related to my work.

Scenario: I save a Copy of the Donor Report (Summary) to My Reports

Given that I am on the Report Criteria or Report Results page for Donor Report (Summary)

When I click Save a Copy

Then I am taken to the Report Settings page

Then the title field contains "Copy of Donor Report (Summary)"

And the "Add to My Reports" checkbox in the Other Settings section is checked

When I click Save

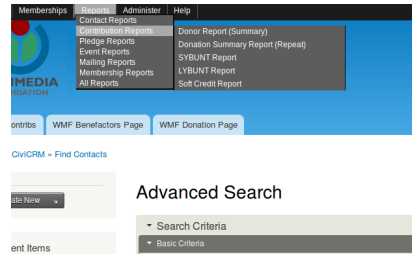
Then my Copy of the Donor Report (Summary) will appear in the My Reports section
And will not appear to any of my colleagues

Scenario: Remove from My Reports without deleting my Copy of the Donor Report (Summary)

Given that I am on the Report Listing page
And I click more > Edit Settings for Copy of the Donor Report (Summary)
When I uncheck Add to My Reports in the Other Settings section
And I click Save
Then my Copy of the Donor Report (Summary) will disappear from My Reports
And appear to all of my colleagues on the Report Listing page under the Contribution Reports section

Scenario: Remove from My Reports and delete my Copy of the Donor Report (Summary)

Given that I am on the Report Listing page
And I click more > Delete for Copy of the Donor Report (Summary)
Then my Copy of the Donor Report (Summary) will disappear from My Reports
And it will not appear to on the Report Listing page under the Contribution Reports section



Feature: Match Reports Menu structure to Report Listing page

As a member of the fundraising team,
I want the Reports Menu to be broken down by section,
So that I can more quickly find reports related to my work.

Scenario: Navigating to the Donor Report (Summary) from anywhere in CiviCRM

Given that I am logged in as a CiviCRM user
When I select Reports from the CiviCRM Administrative Menu,
And I hover over Contribution Reports,
Then I see a list of all the Contribution Reports in the menu,
And I click on an individual report,
Then I am taken to the Report Criteria page for that report

Feature: Report Criteria page for selecting report criteria prior to seeing search results or exporting search results to CSV

As a member of the fundraising team,
I want to select criteria for report results before the report runs,
So that I don't have to wait for results unrelated to my work.

Scenario: Editing criteria for the Donor Report (Summary) from the Report Listing page
Given that I am on the Report Listing page
And I click more > Edit Criteria for Donor Report (Summary)
Then I am taken to the Report Criteria page with the Report Criteria section

Scenario: Running a report from the Report Criteria page
Given that I am on the Report Criteria page
And I have selected report criteria related to my work
When I click Display Results in CiviCRM

Then the report queries the database
And the results are display on the screen

Scenario: Exporting a report to CSV from the Report Criteria page
Given that I am on the Report Criteria page
And I have selected report criteria related to my work
When I click Actions
And I click Export to CSV
Then the report queries the database
And saves a copy of the results on my machine

Feature: Save and Save a Copy options on each Report Criteria and Report Results page

As a member of the fundraising team,
I want to save criteria for reports important to my work
And not overwrite criteria important to my colleagues' work
So that we can continue using a single system for many different purposes

Scenario: Update Donor Report (Summary)
Given that I am on the Report Criteria or Report Results page
And I click Save

Then a pop-up box appears with the message, "Save will overwrite the default criteria for the Donor Report (Summary), do you want to Save a Copy instead?"

Scenario: Save a Copy of the Donor Report (Summary)

Given that I am on the Report Criteria or Report Results page

And I click Save a Copy

Then I am taken to the Report Settings page

Feature: Actions Menu on the Report Listing page and on each Report Criteria and Report Results page

As a member of the fundraising team,

I want to see fewer buttons on the Report Listing, Report Criteria and Report Results page

So that I can focus on actions such as Save a Copy that I commonly take

And ignore actions such as Add Contacts to Group that I take less often

Scenario: Make a selection from the Actions menu

Given that I am on the Report Listing page

Or on the Report Criteria or Report Results page for the Donor Report (Summary)

When I click Actions

Then I see the following choices:

- View in CiviCRM

- Edit Criteria

- Edit Settings

- Export to CSV

- Delete

- Print to PDF

- View as bar graph

- View as chart

- Add contacts to Group