

# Reports and Viewing Activist Data

Information on how to access and collect data on rebels in the Action Network system

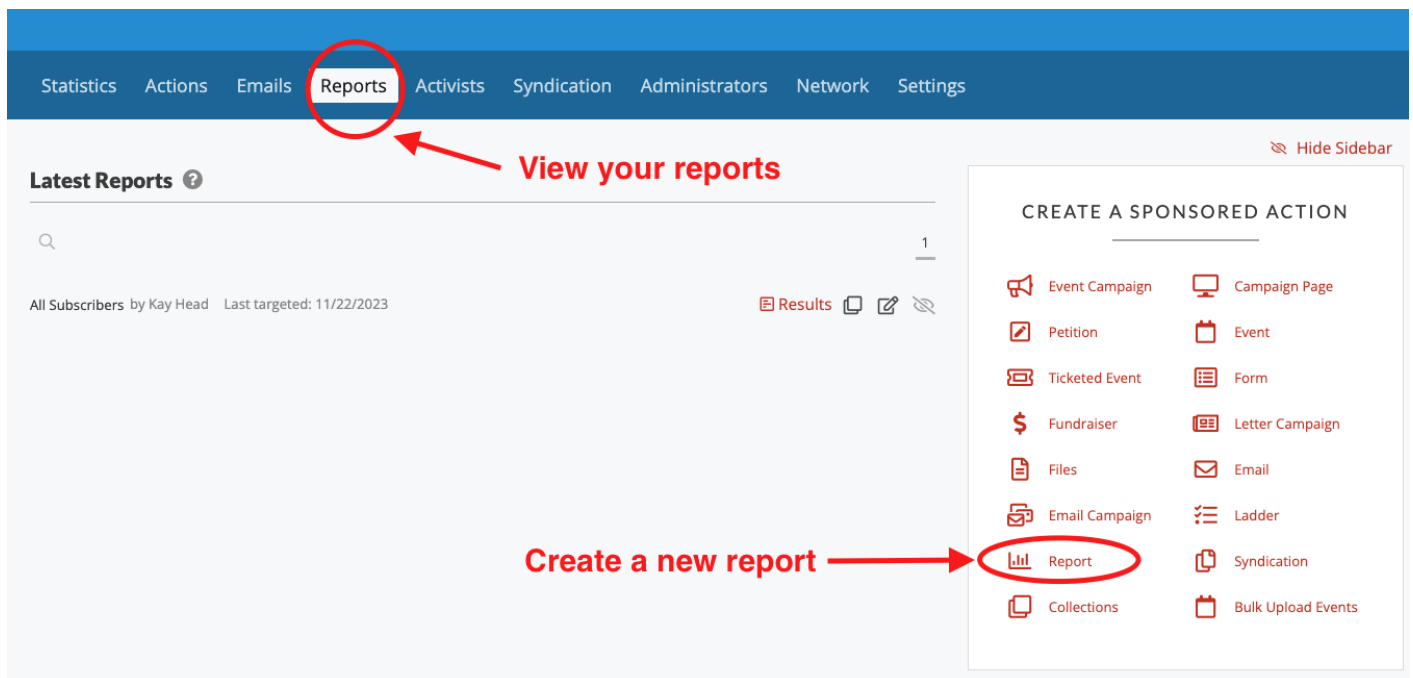
- [Create reports on Action Network](#)
- [Monitor your forms or events](#)
- [Monitor new subscribers with a weekly report](#)
- [View Activist Tags](#)

# Create reports on Action Network

Creating reports in Action Network lets you see what data subscribers have provided, and what actions\* they have taken.

\*actions is Action Network jargon for interaction with emails, forms or events created in Action Network.

To view current reports or create a new one



Add a title and choose criteria from various categories

PULL A REPORT FROM LIST \*  
XR Newcastle Unis

REPORT NAME  
Last 7 days

**EMAIL SUBSCRIPTION STATUS ?**

☒ SUBSCRIBED  
☐ BOUNCING  
☐ SPAM COMPLAINT  
☒ AND HAS EMAIL

☐ UNSUBSCRIBED  
☐ PREVIOUS BOUNCING  
☐ PREVIOUS COMPLAINT

**MOBILE SUBSCRIPTION STATUS ?**

☐ SUBSCRIBED  
☐ BOUNCING

☐ UNSUBSCRIBED  
☐ AND HAS MOBILE NUMBER

Jump to filter...

No filters have been selected.  
Your entire list will be targeted.

**ENGAGEMENT** +

**TAGS, SOURCES, AND FIELDS** +

**ACTIONS AND FUNDRAISING** +

**EMAILS** +

**MOBILE MESSAGES** +

**GEOGRAPHY** +

**QUERIES AND REPORTS** +

COLLAPSE ALL EXPAND ALL

For example - people who have signed up to your list in the last 7 days

**Email Subscription Date ?**

Target activists who subscribed (or whose subscription status was updated) 7 days ago or less ...or target by date

☐ First-time subscribers only

**Mobile Click Activity ?**

Target activists who clicked at least mobile messages in the last days ...or target by date

Including activists who clicked messages from these network

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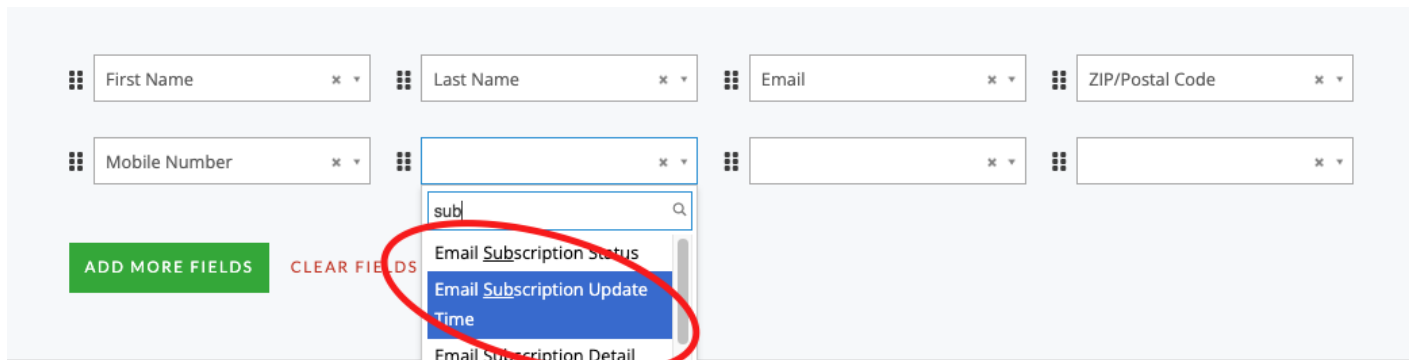
Including activists who clicked messages from these network

## Click 'SAVE AND SELECT DATA'

Blue button on the bottom right of the screen.

## Choose data to view

There are the core fields of email, name, postcode, phone. But also you can choose to view extra bits of data e.g. the date they subscribed to your list. Also you can rearranged these data field using the 6 little dots to pick up and reorder.

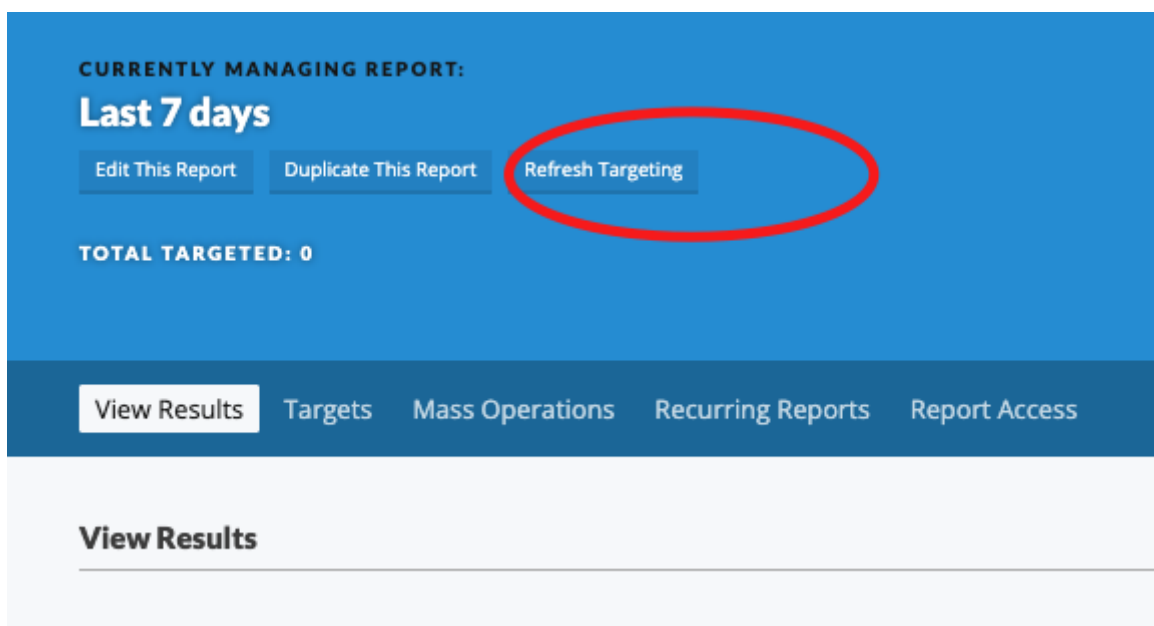


A screenshot of a data selection interface. It features a grid of input fields for 'First Name', 'Last Name', 'Email', 'ZIP/Postal Code', and 'Mobile Number'. Below these fields are two buttons: a green 'ADD MORE FIELDS' button and a red 'CLEAR FIELDS' button. A dropdown menu is open, showing a search bar with the text 'sub' and a list of options: 'Email Subscription Status', 'Email Subscription Update', 'Time', and 'Email Subscription Detail'. The 'Email Subscription Update' option is highlighted in blue. A red circle is drawn around the dropdown menu.

## Click 'SAVE AND GET RESULTS'

## Remember to REFRESH

When you view reports you always need to 'refresh' to get the latest data. This is very important for a report like 'last 7 days'



A screenshot of a report management interface. At the top, it says 'CURRENTLY MANAGING REPORT:' followed by 'Last 7 days' in large bold text. Below this are three buttons: 'Edit This Report', 'Duplicate This Report', and 'Refresh Targeting'. The 'Refresh Targeting' button is circled in red. Below the buttons, it says 'TOTAL TARGETED: 0'. At the bottom, there is a navigation bar with the following links: 'View Results', 'Targets', 'Mass Operations', 'Recurring Reports', and 'Report Access'. The 'View Results' link is highlighted. Below the navigation bar, the text 'View Results' is displayed.

# Mass Operation and Recurring Reports

If you need support on these options, then please get in touch with the [Action Network Data Team](#)

Note that, once you have created a report you will see a link in red, bottom right; CREATE AN EMAIL BASED ON THIS REPORT.

More 'targeting' advice on [this page about targeting emails](#).

# Monitor your forms or events

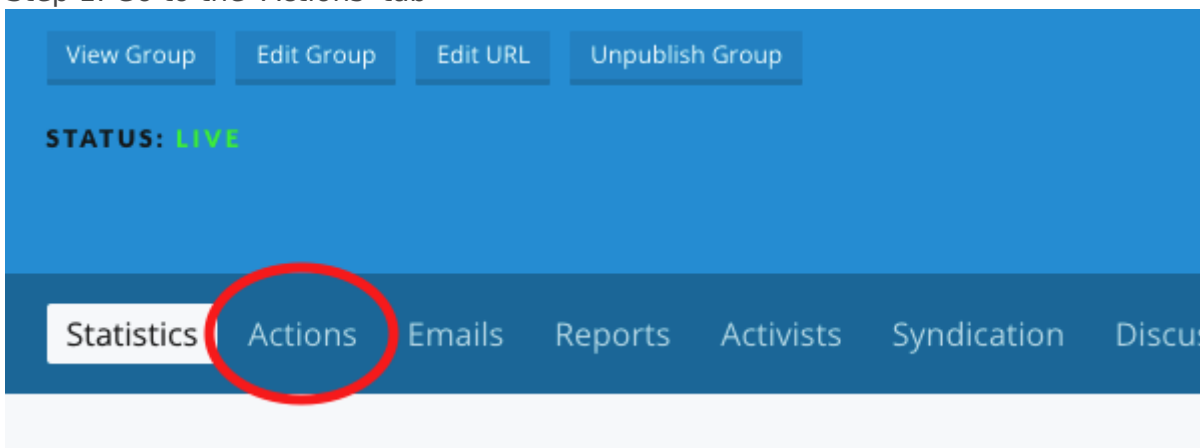
You may want to **learn more about forms and events** before reading this page.

Here are three ways to keep an eye on your sign up forms (or other data collection forms).

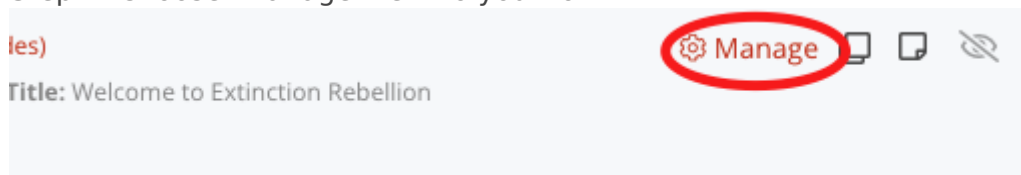
1. View the last 100 activists who signed up
2. Get an email every time someone uses your form/event
3. Make a report of all who have signed up on your form/event

## 1. View the last 100 activists who signed up

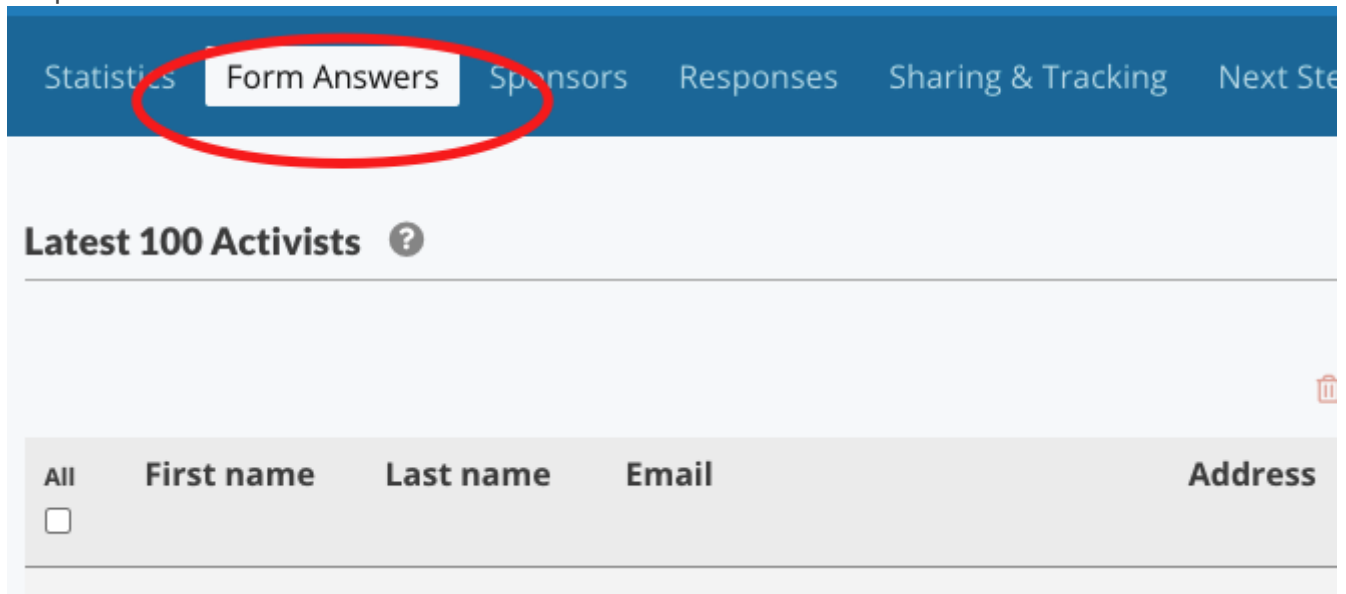
Step 1: Go to the 'Actions' tab



Step 2: Choose 'manage' next to your form



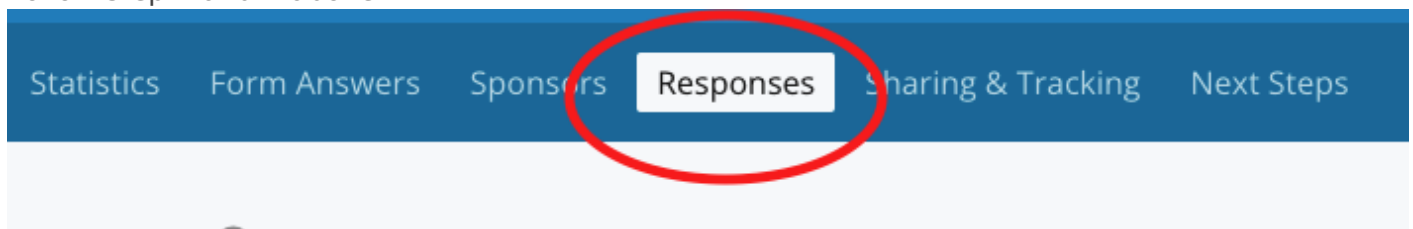
Step 2: Click form answers



The screenshot shows a dashboard with a blue header bar containing navigation links: Statistics, Form Answers, Sponsors, Responses, Sharing & Tracking, and Next Steps. The 'Form Answers' link is circled in red. Below the header, there is a section titled 'Latest 100 Activists' with a help icon. Underneath this is a table with columns: All, First name, Last name, Email, and Address. The 'All' column has a checkbox.

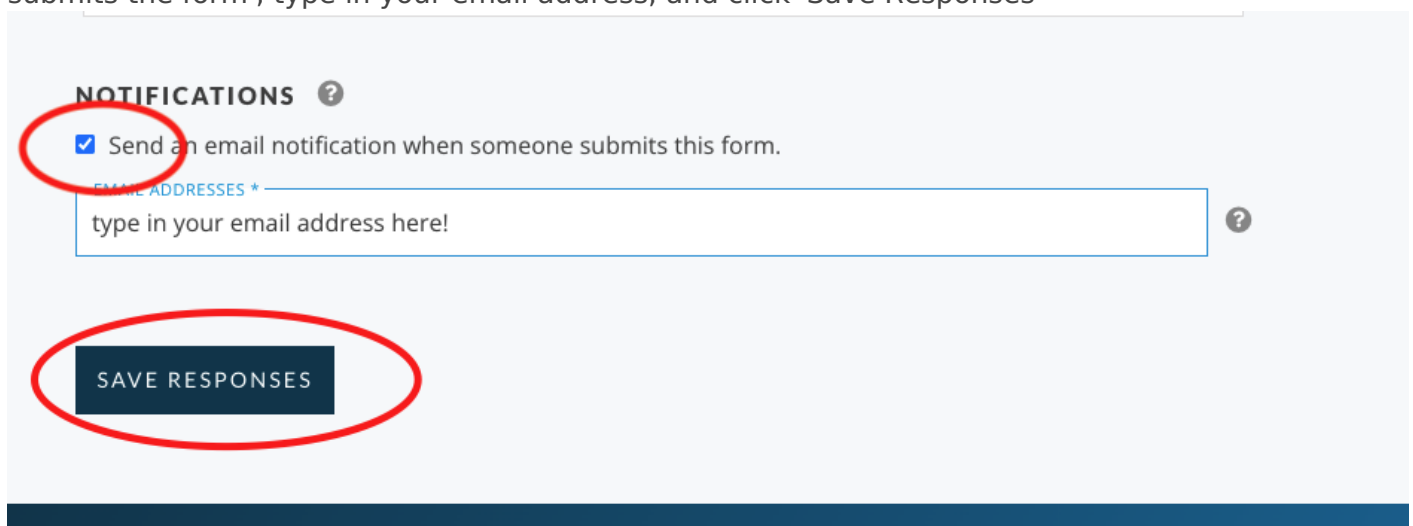
## 2. Get an email EVERY time someone uses your form

Follow step 1 and 2 above



The screenshot shows the same dashboard as before, but the 'Responses' link in the blue header bar is circled in red.

Step 3: Scroll down to the bottom and tick the box 'Send an email notification when someone submits the form', type in your email address, and click 'Save Responses'



















The screenshot shows the 'NOTIFICATIONS' section with a help icon. It contains a checkbox labeled 'Send an email notification when someone submits this form.' which is checked and circled in red. Below this is a text input field labeled 'EMAIL ADDRESSES \*' with a placeholder 'type in your email address here!' and a help icon. At the bottom, there is a dark blue button labeled 'SAVE RESPONSES' which is also circled in red.


## 3. Make a report of all who have signed up

Step 1: Click on Report

## CREATE A SPONSORED ACTION

- |  |  |
|--|--|
|  Event Campaign |  Campaign Page      |
|  Petition       |  Event              |
|  Ticketed Event |  Form               |
|  Fundraiser     |  Letter Campaign    |
|  Files          |  Email              |
|  Email Campaign |  Ladder             |
|  <b>Report</b>  |  Syndication        |
|  Collections    |  Bulk Upload Events |

Step 2: Give it a name

QUERY MODE 

XR UK

**Report Name \***

Step 3: On the left hand 'Include' column find your report - just start typing its name into the field labelled 'Actions' and you should find it (ignore the number that just means in this case it's the 1925th form on the system!) - you just need to know what your form is called and search for that.



## Include

Click to make your selections...

Add Collection

## Actions ?

× [1925, Form] Sign up form (XR Bedford)

## Emails ?

Click to make your selections...

Step 4: Click 'Save and select data' blue button on bottom right.

Step 5: Choose which fields you'd like to see in your report and what order you'd like to see them

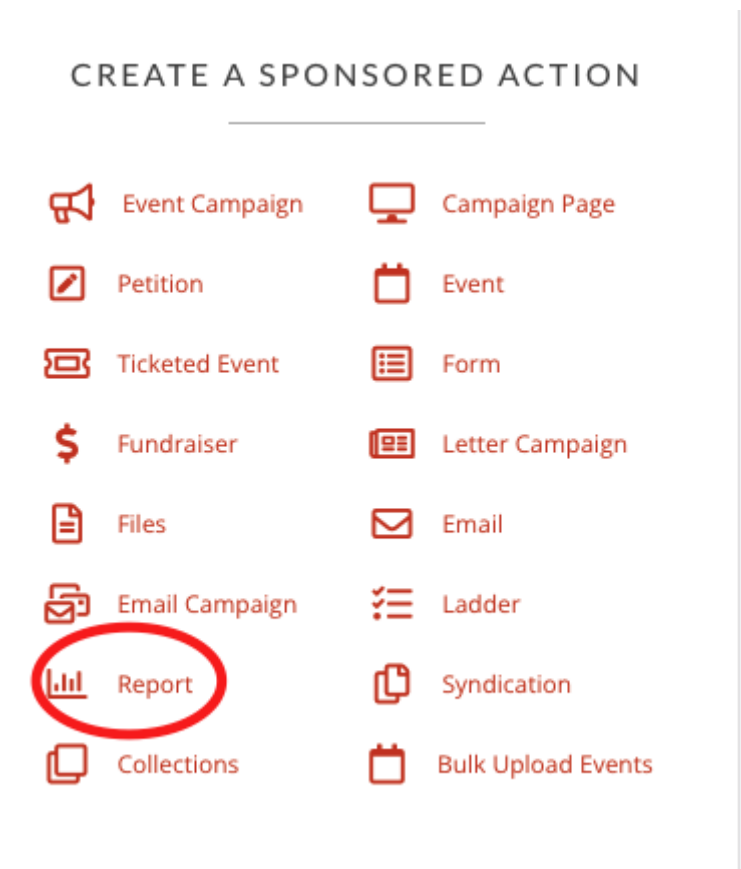
Step 6: Click 'Save and get results' button

Remember if you come back to view this report another time - you have to *refresh* to get the latest information.

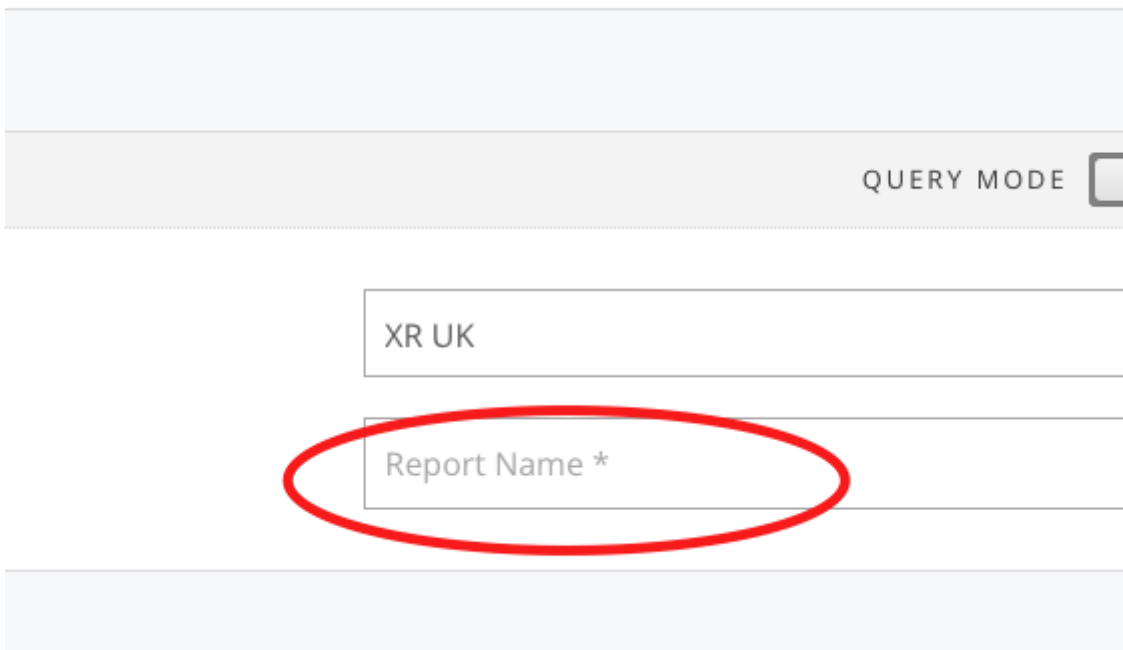
# Monitor new subscribers with a weekly report

This report will pick up all new subscriptions to your email list.

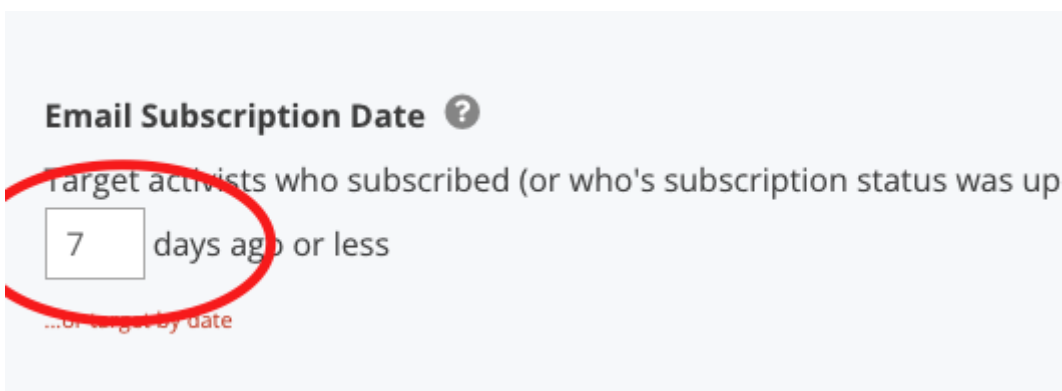
1. Click on 'Report'



2. Give the report a name



3. Scroll further down the left hand column and pick (for example) all sign ups in the last 7 days.



4. Click 'Save and select data' blue button on bottom right.
5. Choose which fields you'd like to see in your report and what order you'd like to see them
6. Click 'Save and get results' button  
Note : This may take some time to load!
7. Then set up a recurring report to be run automatically and emailed to you...

## Recurring Reports ?

Interval ?

Weekly

Start Date ?

February 13, 2022

Email Addresses ?

type your email address here

→ **SAVE**

# View Activist Tags

## View which tags have been added to a email list subscriber

1. On the top menu - click **People** and from the drop-down menu and click on the work **Activists**.
2. Type in the name or email address of the person who you are enquiring about and click **SEARCH**.
3. If this person is on your email list they should now be listed below the search box and you can now click **VIEW RECORD**.
4. Then click on **Tags**.

Only 10 tags are shown at one time, so if the person has more than 10 tags, you need to click on the number 2 (or 3!) to see more of their tags.

## Example : Has someone signed the volunteer agreement?

The tag you are looking for is:

XR\_May2021\_Volunteer\_Agreement

If they don't have this tag, you should ask them to [sign the Volunteer Agreement here](#).