

ReportWare



Agenda

- Shared Stories
- ReportWare Overview
- New Features Coming in 2009
- Incorporating Crystal into the donor.com Environment
- Demos



Shared Stories

How have you used ReportWare in your organization?

- internal processes?
- timely reporting?
- executive dashboards?
- visual enhancement?
- Why are you using Reports?

Overview

- Benefits
 - SQL access to raw data – advanced reporting
 - Ad-hoc queries to enhance functionality
 - Access for ODBC/JDBC compliant tools
 - Flexible, quick, great for expert users
 - Provide custom reports for your users
 - Allows expert users to write advanced, custom reports for your organization

ReportWare

- Crystal Clear Designer tool
- Scalable Crystal Server for Rendering
- Separate Reporting database
 - Replicated real time
 - Does not interfere with DASC0 usage
- Enhances the 100's of pre-built reports
- Professional Services can come along side

Ad-hoc Report Writing Considerations

- Not for novices – Some skills required
 - Requires knowledge of SQL
 - data optimizations, joins, SQL fluency
 - Requires understanding of DASC0 data structures
 - data relationships, physical storage structure, business rule abstraction, meta-data concepts
 - Bypasses business logic

Considerations

- Reports are tied to physical data structures
 - data structures can change based on new features
 - clients are responsible for maintaining and upgrading reports as tools and versions change.
 - donor.com will be glad to assist

New Features in 2009

- ReportWare fully incorporated into DASCOW
 - Same configurations for all interfaces
 - Crystal reports now adhere to DASCOW security
 - Both Crystal and RPT are supported for MySQL
 - New Crystal Report writing guidelines
- Select Model and Custom Output supported by Crystal
 - tag, list, custom output formats as SQL tables
 - marries the power of DASCOW select and custom output formats with ad hoc reporting

ReportWare in DASCO

- Same interface for DASCO 2, dasco3, web and mobile interfaces
 - donor.com has adapted the management report power of DASCO 2 in all interfaces
 - New API's for reporting
 - Report Groups
 - DASCO Report Security
 - DASCO report parameters
 - RPT and Crystal reports now on all platforms and all interfaces



Report Interface in DASCO 2

Report Description	Printer	Copies	Groups	Select
1. 0120 Function/Update ADI Counts	NA	1	X	
2. 2500 ADI Income Analysis I	b	1	N	
3. 2501 ADI Income Analysis II	c	1	N	
4. 2502 ADI Income Analysis III	c	1	N	
No more reports				

TEST2 REPORT PRODUCTION CONTROL 04/09/09

SELECTION: Line number (1-6) or Report number, [R]un reports,
View [Ar]chive or [Hi]story, [B]ackup, <R> next screen

Report to screen in DASCO 2

Report Number 1100		DW Test2				
Run Date 04/09/09		Monthly Large Donor Report for Jan 2009 Designations 100 to 9999				
Name	Gift Amount	Gift Date	Desg Code	Motv Code	Income Center	
Mrs. Muriel Bell	10.00	01/06/2009	2000	ZZZZ-ZZZZ	I	
Mrs. Muriel Bell	20.00	01/06/2009	2000	ZZZZ-ZZZZ	I	
Mrs. Muriel Bell	30.00	01/06/2009	2012	ZZZZ-ZZZZ	I	
Mrs. Muriel Bell	10.00	01/06/2009	2000	ZZZZ-ZZZZ	I	
Mrs. Muriel Bell	30.00	01/06/2009	2012	ZZZZ-ZZZZ	I	
Brinkman	20.00	01/05/2009	2000	ASTF-0000	0	
Brinkman	35.00	01/06/2009	2000	ASTF-0000	0	
Daniel and Annette Brinkman	0.00	01/06/2009	2000	ASTF-0000	0	
Daniel and Annette Brinkman	20.00	01/06/2009	2000	ASTF-0000	0	
Daniel and Annette Brinkman	20.00	01/06/2009	2000	ASTF-0000	0	
Daniel and Annette Brinkman	5.00	01/06/2009	2000	ASTF-0000	0	
Daniel and Annette Brinkman	50.00	01/06/2009	2000	ASTF-0000	0	
102.00	4	102.00				

SELECTION < view next screen, [B]ackup one screen, > abort



Report Interface in dasco3

Report Manager

Groups (25) Search

Keyword: ADI

Search

Matching Reports

Report	Description
0120	Function/Update ADI Counts
2500	ADI Income Analysis I
2501	ADI Income Analysis II
2502	ADI Income Analysis III

Run:

Single Report As Group

Report Parameters

Report: 0120 - Function/Update ADI Counts

Summary: Not Available

Variables:

Destination: Print to PDF...

Run Report

Crystal Report in dasco3

DASCO 3 Account Profile - DW Test2

Date: April 9, 2009 Page 1 of 2

Mr. Mike Schroeder
PMB 602, 110 West 9th Street
Wilmington, DE 19801

Idoode: 8-1267
 Salutation: Mike
 His Name: Mike
 Her Name: Jeanette

Primary Phone: 403/275-5146 Email: mike@donorware.com

Source: 01/07/1993 W000-0000 - White Mail
 Type of Name: 99 - Unknown Individual
 Income Center: N/A
 Mail Restriction: 3 - Reserved for future use
 VIP Code: N/A
 Notify: N/A

Flags

Flag Value	N	A	3	3	9												B	F	L				
Flag Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	

	Date	Amount	Designation	Motivation
First	02/01/1993	\$ 25.00	12010 - Banquet Pledge	B92B-0000
Largest	12/19/2008	\$ 50.00	2000 - General Fund	ASTF-0000
Last	12/28/2008	\$ 10.00	2000 - General Fund	ASTF-0001

Giving Summary

	---2009---	---2008---	---2007---	---2006---	---2005---	---LIFE---
D - Donations	\$ 20.00 2	\$ 109.00 4	\$ 80.00 1	\$ 0.00 0	\$ 12.00 1	\$ 246.00 9
N - Non Deductible	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0	\$ 25.10 1
K - Gifts in Kind	\$ 0.00 0	\$ 0.00 0	\$ 25.00 1	\$ 0.00 0	\$ 0.00 0	\$ 25.00 1
R - Reference Only	\$ 0.00 0	\$ 0.00 0	\$ 25.00 1	\$ 0.00 0	\$ 0.00 0	\$ 25.00 1
P - Payment	\$ 0.00 0	\$ 0.00 0	\$ 6,000.00 1	\$ 0.00 0	\$ 0.00 0	\$ 6,000.00 1

Annual Gift Amount for Last 5 Years By Dollar Type

Dollar Type	current_year_amt	one_yr_ago_amt	two_yr_ago_amt	three_yr_ago_amt	four_yr_ago_amt
Donations	\$20.00	\$109.00	\$80.00	\$0.00	\$12.00
Gifts in Kind	\$0.00	\$0.00	\$25.00	\$0.00	\$0.00
Non Deductible	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Payment	\$0.00	\$0.00	\$6,000.00	\$0.00	\$0.00
Reference Only	\$0.00	\$0.00	\$25.00	\$0.00	\$0.00

Number of Gifts for last 5 Years By Dollar Type

Dollar Type	current_year_cnt	one_yr_ago_cnt	two_yr_ago_cnt	three_yr_ago_cnt	four_yr_ago_cnt
Donations	2	4	1	0	1
Gifts in Kind	0	0	1	0	0
Non Deductible	0	0	0	0	0
Payment	0	0	1	0	0
Reference Only	0	0	1	0	0



New!! ReportWare on the Web

donor.com - Reports

https://donor.com/my/test/reports

Most Visited ▾ Apple.com Craig's List DonorWare, LLC - Fo... google dwvnp.net StudentLife InetSoftware Mac D3 Launcher WebGUI - Admin Co... wreconsole TKT 50153212 - ur... RW pwds

donor.com - tickets donor.com - Reports

donor.com

home about products community support staff contact

hello jon | logout my account tickets wiki resources donorU my suggestions Signup Turn Admin On!

reports

Already know the report number you want to run?

Report Number: go

Want to search for a report by keyword?

Keyword: go

group list

- A - Accounts Receivable Reports
- Y - All Reports In No Group
- Z - All Reports xxxxxxxxxxxxxxxxxxxxxxx
- N - Analysis
- C - Broadcast Reports
- Q - Code Frequency Reports
- D - Daily Reports
- K - Direct Mail
- V - Divisional
- F - Financial/Accounting
- O - Inventory Reports
- J - Major Donor
- I - Missionary/Staff Reports
- M - Monthly Reports
- E - Motivation/Designation
- 2 - PK Vounteer Reports
- P - Pledge
- 7 - Preliminary Reports
- X - Report Functions w/No Output
- L - Sales Reports
- U - Subscription Reports
- T - Turbo
- 9 - User reports
- 8 - Website Priority Reports
- W - Weekly Reports

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Done donor.com 0.1 YSlow 2.884s 3 service warnings 3 critical services



Reporting on the Web

report-6.pdf (1 page)

Previous Next Zoom Move Text Select Search

Report Number 1100 DW Test2
 Run Date 04/09/09 Monthly Large Donor Report for Jan 2009 Page 1
 Designations 100 to 9999

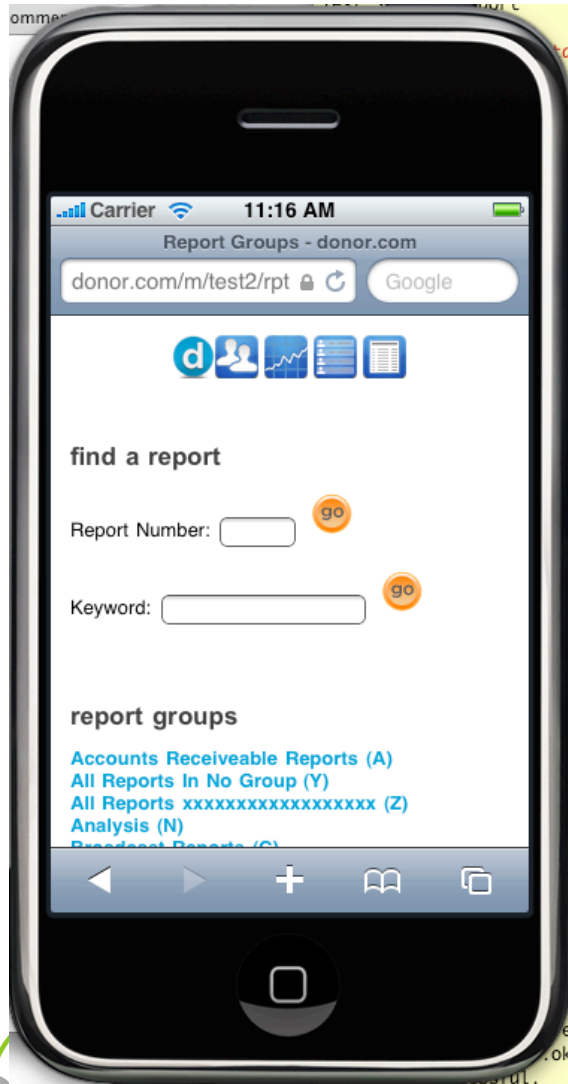
Name	Gift Amount	Gift Date	Desg Code	Motv Code	Income Center	Y-T-D Amount	Y-T-D Gifts	Lifetime Amount
Mrs. Muriel Bell	10.00	01/06/2009	2000	EEEE-EEEE	I	120.00	4	6,009.63
Mrs. Muriel Bell	20.00	01/06/2009	2000	EEEE-EEEE	I	120.00	4	6,009.63
Mrs. Muriel Bell	30.00	01/06/2009	2012	EEEE-EEEE	I	120.00	4	6,009.63
Mrs. Muriel Bell	10.00	01/06/2009	2000	EEEE-EEEE	I	120.00	4	6,009.63
Mrs. Muriel Bell	30.00	01/06/2009	2012	EEEE-EEEE	I	120.00	4	6,009.63
Brinkman	20.00	01/05/2009	2000	ASTF-0000	0	55.00	3	168.00
Brinkman	35.00	01/06/2009	2000	ASTF-0000	0	55.00	3	168.00
Daniel and Annette Brinkman	0.00	01/06/2009	2000	ASTF-0000	0	102.00	4	102.00
Daniel and Annette Brinkman	20.00	01/06/2009	2000	ASTF-0000	0	102.00	4	102.00
Daniel and Annette Brinkman	20.00	01/06/2009	2000	ASTF-0000	0	102.00	4	102.00
Daniel and Annette Brinkman	5.00	01/06/2009	2000	ASTF-0000	0	102.00	4	102.00
Daniel and Annette Brinkman	50.00	01/06/2009	2000	ASTF-0000	0	102.00	4	102.00
Mr. Marvin Cassabaum	20.00	01/06/2009	2000	ASTF-0000	0	19.00	2	44,831.37
Mrs. Frances P. Faber	20.00	01/06/2009	2000	1111-1111	0	20.00	1	330.00
Mrs. Suzanne Fahrnbauer	20.00	01/06/2009	2000	ASTF-0000	0	246.00	1	40,618.20
Mrs. Suzanne Fahrnbauer	200.00	01/06/2009	2000	ASTF-0000	0	246.00	1	40,618.20
Mrs. Suzanne Fahrnbauer	12.00	01/06/2009	2000	ASTF-0000	0	246.00	1	40,618.20
Mrs. Suzanne Fahrnbauer	12.00	01/06/2009	2000	ASTF-0000	0	246.00	1	40,618.20
Mrs. Suzanne Fahrnbauer	2.00	01/06/2009	2000	ASTF-0000	0	246.00	1	40,618.20
Mrs. and Mrs. William Fay	10.00	01/07/2009	2000	ASTF-0000	0	35.00	2	235.00
Mr. and Mrs. Mark Gaking	20.00	01/06/2009	2000	1111-1111	0	20.00	1	30.00
Helen Haak	5.00	01/06/2009	2000	ASTF-0000	0	5.00	1	30.40
Mrs. H. C. Hagemann	10.00	01/06/2009	2000	ASTF-0000	M	10.00	1	39,746.53
Mr. and Mrs. Mac Kaiser	100.00	01/06/2009	2000	ASTF-0000	0	100.00	1	100.00
Mr. John Michael Kakumasu	97.00	01/06/2009	2000	1111-1111	0	97.00	1	9,743.18
Miss Diane R. Kuehl	100.00	01/06/2009	2000	ASTF-0000	0	274.00	2	35,483.87
Miss Diane R. Kuehl	20.00	01/06/2009	2000	ASTF-0000	0	274.00	2	35,483.87
Miss Diane R. Kuehl	50.00	01/06/2009	2000	ASTF-0000	0	274.00	2	35,483.87
Kelvin Page	50.00	01/05/2009	2000	1111-1111	0	50.00	1	50.00
Jon Tracy	50.00	01/06/2009	2000	1111-1111	0	50.00	1	50.00
Mrs. S. Tran	5.00	01/06/2009	2000	1111-1111	0	5.00	1	45.00

NOTE: Includes only gifts of \$100 or more within the month and designation range requested.

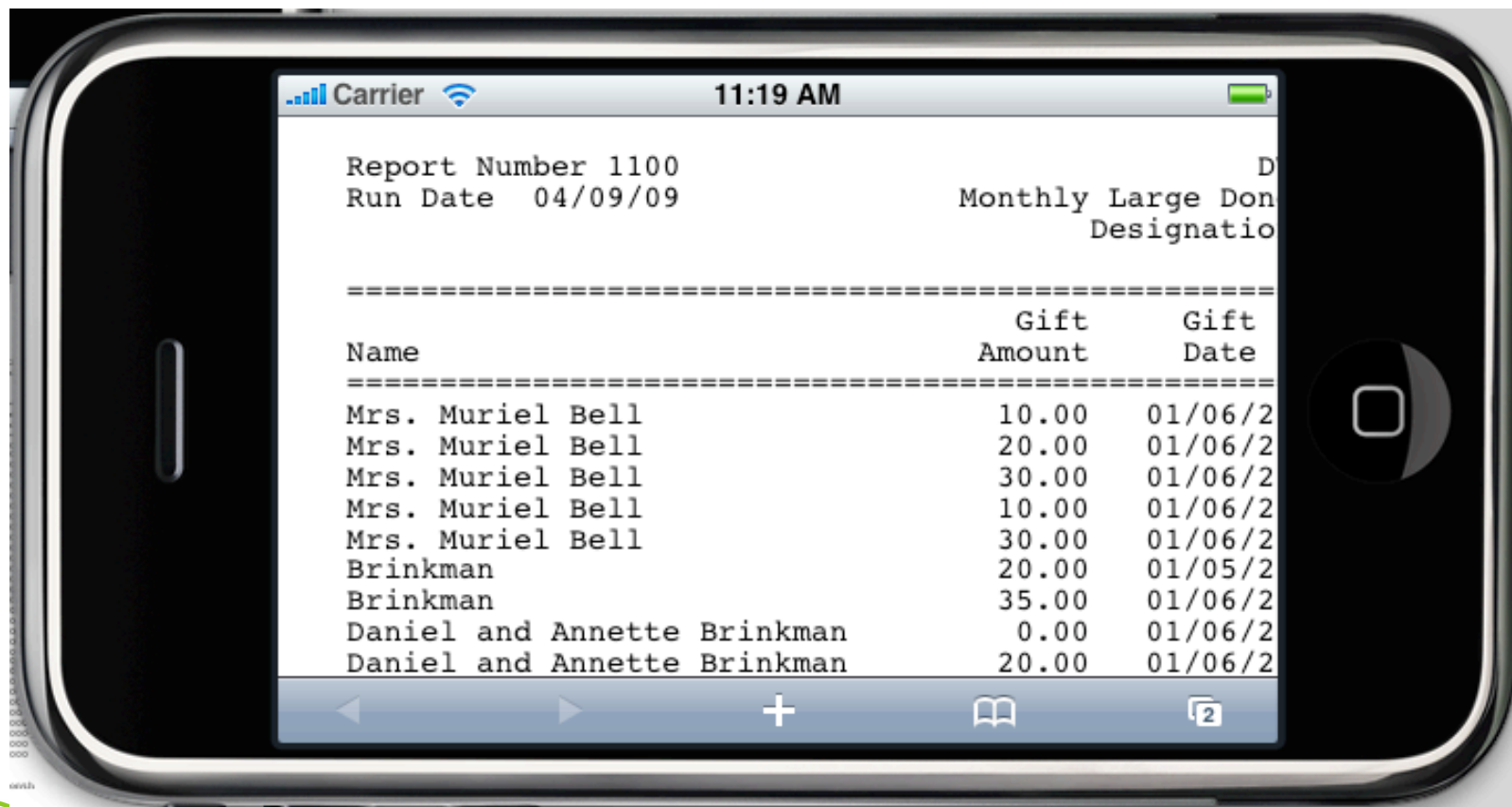
End-of-Report



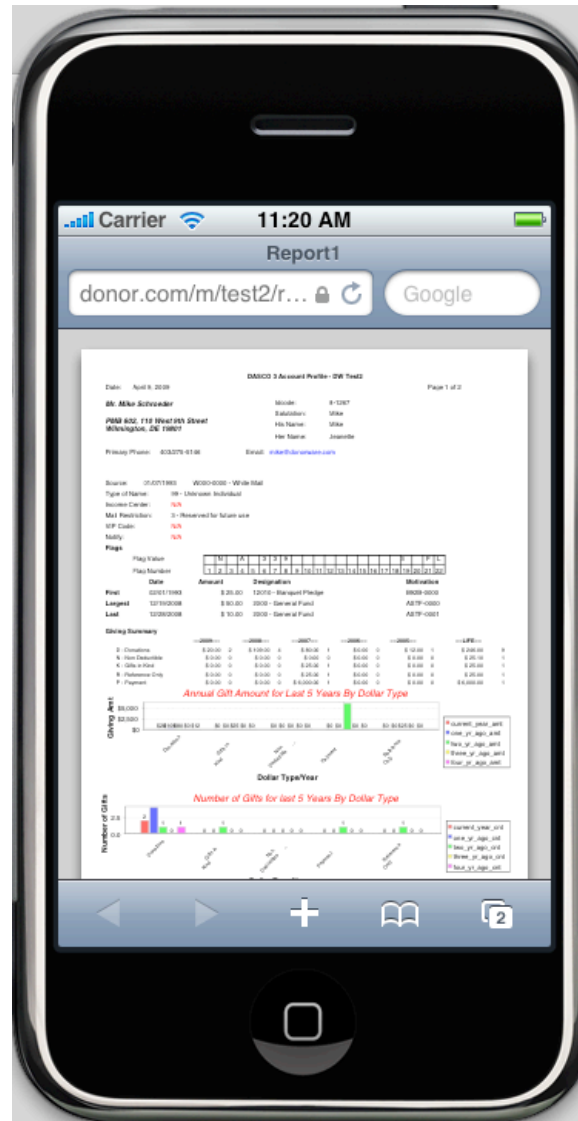
New!! Reporting on Mobile devices!



iphone – Turn and View !!



Crystal Report – iphone



Reporting through DASCO



DASCO Report Definition – Built in

- Uses the DASCO dm0100 binary for Reporting
 - Report Management
- Reports need to conform to DASCO standards
 - Utilizes the DASCO Reports Interface
 - Online manuals document setup and configuration

https://donor.com/manuals_admin-ref_rpt

Reports in DASCO

- Conform to DASCO report naming
 - user reports – 9000–9999
 - Conforms to DASCO input arguments

RPTVAR Info: https://donor.com/manuals_admin-ref_vars

- Conforms to Group and Report definitions in DASCO
- RPT Report functions are not supported in Crystal

Crystal Report Writing Changes

- Report names must conform to DASCOS stds
 - dm9801.rpt, dm9991.rpt
- Report variables must conform to DASCOS stds
 - args: RPTIDC, RPTDHD, RPTDLD
- Web Interface is independent of WebGUI
 - Reports uploaded to: \$DBPATH/./urpt
 - Reports accessed through API's

Changes coming in 2009

- Current Web interface and scheduler will be deprecated
 - Schedule not yet determined
- Reports will need to be updated to conform
 - Guidelines will be produced and shared

Select and Custom Output Formats

- NEW!! Short Term MySQL tables
 - tag, lst and other files can be read in as MySQL tables for SQL access
 - new command to create Short Term tables:
 - `selout -short_term <filename>`
 - Tables are accessible across users
- Harnesses the power of DASCOS select engine and Custom Output Formats!!

Crystal in DASCO

- Four general uses (how many more can you come up with?):
 - Simple Crystal Report
 - Simple Crystal Report without Parameters using a tag file
 - Crystal Report with Parameters using a tag file
 - Crystal report in a shell script using multiple tag files

Demos

Early Beta Release

- Demos will show current usage
- The capability is under development

Option: Use shell scripts

- Show Shell script for use with params and selout

Ideas for Use

- list several ideas
- limitless ideas:
 - find all people around Atlanta based on web use and certain level of giving: zip->select->crystal
 - Get all fields in a custom output spec and display summary charts and graphs
 - filter multiple ways, then manipulate the results with other data – send dashboard reports every morning to execs with drill down

When will this be available?

- in development, first phase targeted for summer
 - can use crystal now and can convert simply: replace arg names
 - use d3 for reports – move away from web

Questions?

- Go Make a Difference!

