



ReportWare Workshop

April 14, 2009

donor.com Community Conference

Workshop Facilitator:

Jon Rockhold

- Morning:
 - Introduction
 - ReportWare Architecture
 - Accessing and Maintaining Reports – Practice
 - Getting to Know Crystal Clear Designer XML
 - Break
 - Build a Simple Report
 - Understanding the DASCOSchema
- Lunch

- **Afternoon**
 - **Connecting to the Database – Practice**
 - **Building a DASCOS Report – Part 1**
 - Donor Gift History Example
 - **Break**
 - **Building a DASCOS Report – Part 2**
 - Advanced Features – Grouping/Summarizing/Drill Down
 - Sub-Reports
 - **Wrap Up**
 - Resources, Additional Help

Workshop Outcomes

- Understand ReportWare Environment
- Learn the Crystal Clear Designer XML Tool
- Review of donor.com Database Schema
- Jump start Ad-Hoc Reporting against DASCO database

- What are your expectations and goals for this Workshop?
- What do you want to accomplish from this Workshop?
 - Evaluation
 - Training
 - Needs for custom reporting
 - Other

Why Use ReportWare?

- Data analysis
- Custom reports
- Feature rich reporting tool
 - Drill down
 - Sub-reports
 - Charts, graphs, pictures
 - Many other features, limited only by your imagination

What Do I Need to Know?

- Underlying Data Structure and relationships
- Crystal Clear Designer Tool
- SQL
- Relational Database concepts
- MySQL Syntax is helpful

ReportWare In Use

- ReportWare refers to the use of the ReportWare database, Crystal Clear Tools and ODBC access to your donor.com database
- ReportWare database is a fully replicated copy of your MySQL based donor.com database schema
- Crystal Clear is the main tool used in the ReportWare environment but other ODBC compliant tools may be used to attach to the database
- Users DO need to be aware of how to connect and utilize these third party tools.
- donor.com cannot be responsible for support or usage of 3rd party tools

ReportWare Built In Features

- Crystal Clear from inet software – Report design tool
- Web Interface for report distribution and usage
- ODBC/JDBC access and compliance
 - read-only access to donor.com db schema
 - Business logic is bypassed (use API's if needed)
- Report Scheduler
- RWbatch access to run reports from DASC0

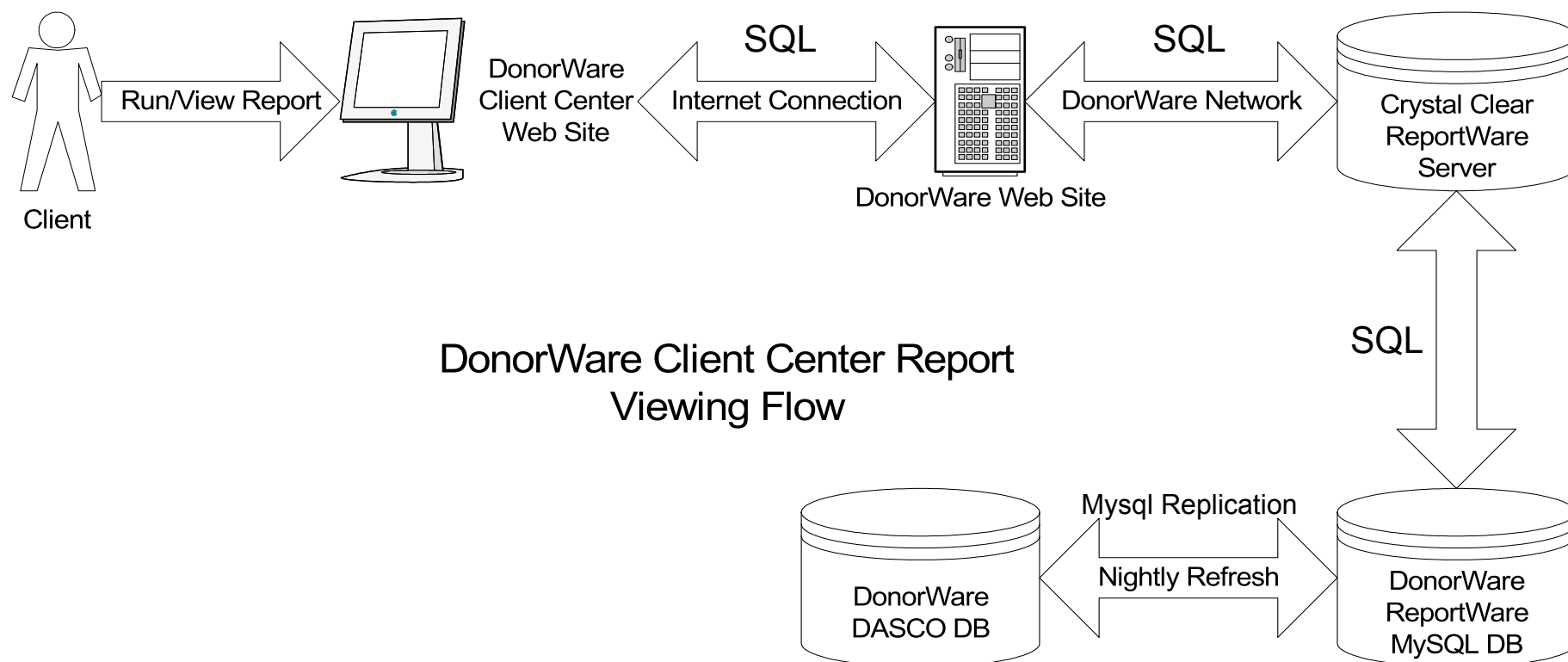
ReportWare Creative Usage

- ReportWare command line executables
 - run_schedule, run_report, email_report
- ReportWare API's (see reference section of resources)
- Utilize commands from scripts, hooks, cron jobs
- Incorporate reports using command line options and API's from other Client written scripts using donor.com tools

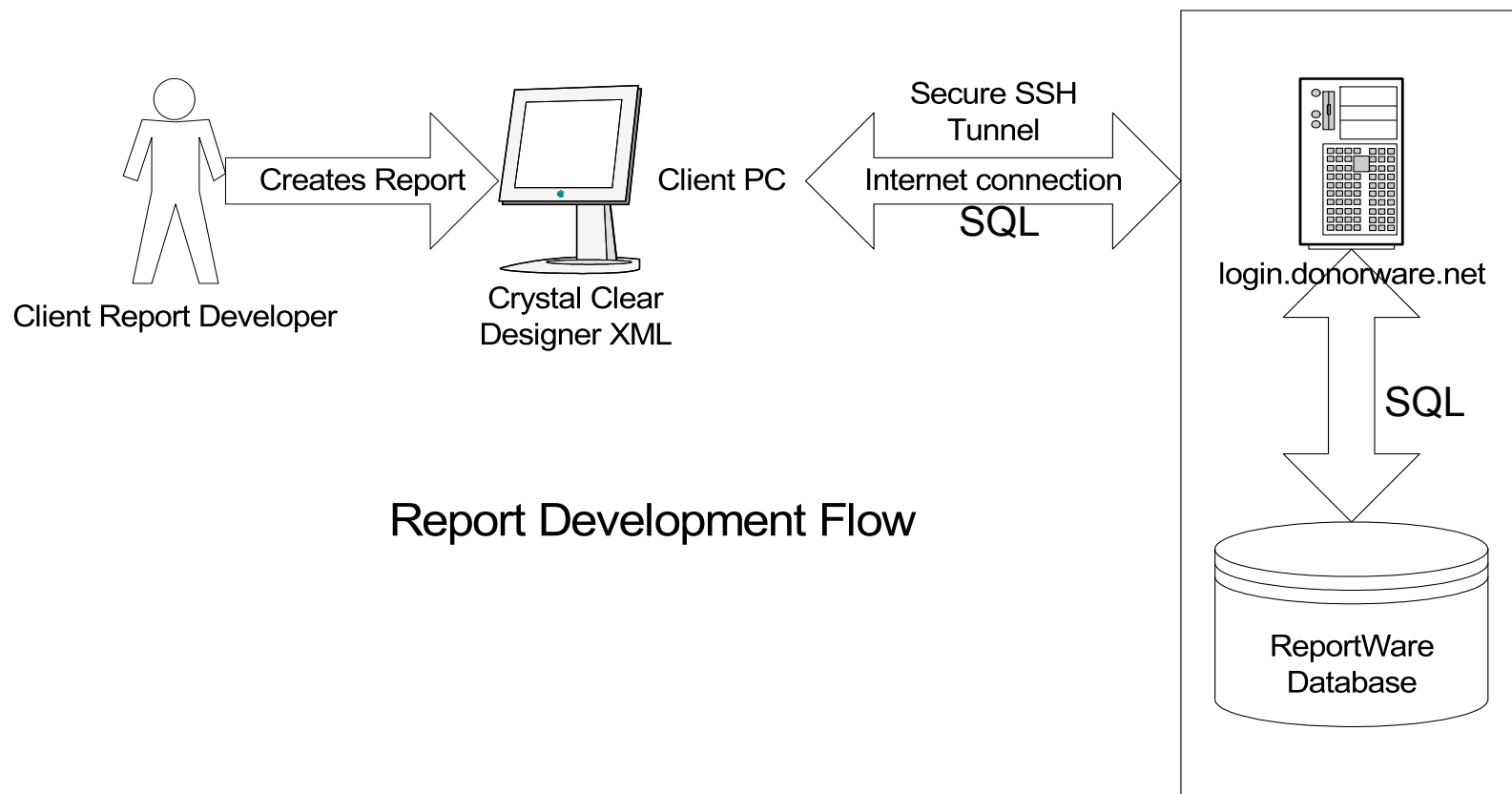
- Types of ReportWare users:
 - Report Users:
 - Run and use report output
 - Receive emailed/printed report output
 - Report Developers:
 - Create/update reports
 - Report Administrators
 - Administer and deliver reports
 - Schedule reports to run



Architecture ReportWare User Environment

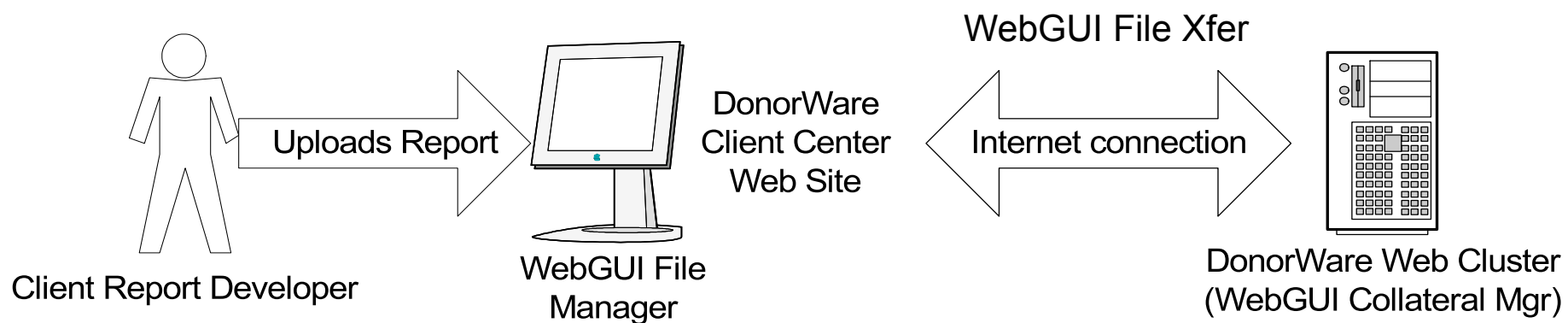


Architecture Report Development Environment



Report Development Flow

Architecture ReportWare Administration



Report Uploads/Client Center Maintenance



Architecture ReportWare Components

- Crystal Clear Designer XML Report tool
 - Robust, Powerful
 - Crystal Reports/Microsoft Compatible
 - Accesses MySQL and other databases
- Crystal Clear Plus Server
 - Report Rendering
 - Secure
 - Scalable
 - Flexible



Architecture ReportWare Components, cont.

- My donor.com Client Center (new this year)
 - Moving to common Reporting interface
 - DASCO Security
 - Allows Report Grouping
- Scalable donor.com Web Cluster
 - Scalable
 - Secure
 - Load balanced

- MySQL Read Only Reporting Database
 - Updated on a nightly basis from DASCOS (UNIFY)
 - To be deprecated by summer 2009
 - Real time replication (MySQL)
 - Secure
 - Flexible
 - Queries do not affect the DASCOS transactions
- MySQL Replication now supersedes the older copy2mysql (requires DASCOS on MySQL)
 - effectively “real time” updates of ReportWare
 - Supplementals now converted to views



My donor.com Client Center

donor.com - ReportWare for ACME

https://donor.com/my/acme/reportware

Apple.com Craig's List DonorWare, LLC - Fo... google dwvnp.net StudentLife InetSoftware Mac D3 Launcher WebGUI - Admin Co...

donor.com - ReportWare Trai... donor.com - ReportWare for A...

donor.com

home about products community support staff contact

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

acme reports

ACME Generated reports.

Report Name	Actions	Description	Date Uploaded
D3AccountProfile.rpt [download template]		DASCO 3 Profile Report	2/16/2008
DonorGiftSummaryChart.rpt [download template]		Sample Reports - Drill down, Sub-Report with Chart	2/20/2008
ACME_Db_checker.rpt [download template]		Simple Report with Database Connection	2/20/2008
ACMEfstlgtgift.rpt [download template]		First/Largest Gift Report	2/20/2008
dm9990.rpt [download template]			2/20/2008

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My donor.com Client Center

- Sort reports (alphabetically or no sort)
- Export to different output formats
- Enter Admin mode (if login has permission)
- Edit Report Entry
- Specify security (user group assignment)



Student Exercises

- See Handout # 1 – Client Center Exercises

donor.com/my/acme

- Learning the Crystal Clear Designer XML report design tool



Crystal Clear Designer XML Features

- Java Based
 - Platform independence
 - Small footprint
 - Crystal Reports like functionality
- Cost effective

- Windows like GUI interface
- Report Palette
- Fields Browser
- Design/Preview Modes
- Database Connectivity



Designer Components, cont.

- Reports saved in XML format
- Reads and interacts with Crystal Reports files/ templates
- Online Help
- Supports multiple export formats



Designer Components Demonstration

Facilitator tour of Crystal Clear Designer XML



Building a Simple Report

Facilitator led session



Student Exercise

- See Handout #2 – Build a Simple Report



Understanding the DASC0 Schema

Database Schema Presentation

- Facilitator led session
 - Connecting to the database
 - Choosing tables
 - Linking tables



Building a DASCOS Report Part 1

In this Facilitator led session, we will build a custom Report, using the DASCOS hstf table to look at Donor's Gift history



Student Exercise

- See Handout #3 – Build a DASCOS Report – Part 1

- To align and resize objects, highlight the fields desired and right click. Use the align and resize options to quickly set the fields.
- Use the “Snap to Grid” option to allow for easier alignment of fields. (View menu)
- Grab and detach the Fields Browser and position it where it is more convenient if desired.
- To change ruler units, right click on an empty area of the Report Palette and choose the value desired.
- Use the Online Help liberally for assistance with formulas and assistance.
- Use the Preview function frequently to see how the report appears and adjust as necessary.

- Efficiency in your SQL statements can be very critical. Be sure to read the section in the online help on “Record Selection Formula...” under the “Report Data” area of the Online Help (Read all the online help to become familiar with the tool!)
- Use the donor.com ReportWare Online Forum, or email reportware@donor.com for assistance when questions arise.



Building a DASCOCO Report Part 2

In this Facilitator led session, we will build a custom Report, using the DASCOCO hstf table to look at Donor's Gift history



Student Exercise

- See Handout #4 – Build a DASCOS Report – Part 2

- Learn the ReportWare Environment
- Learn basics of creating a Crystal Clear report
- Hands on experience writing reports against a DASCO database

- donor.com Resources:
 - donor.com Online Manuals – see ReportWare
 - Step-by-step setup/operational instructions
 - Online FAQ – Will expand as new questions are received
 - See donor.com/manuals_reportware
 - donor.com ReportWare Discussion Forum
 - Online, threaded discussions with RSS feed
 - See donor.com/org/discuss

- Bibliography of useful resources
 - See ReportWare and You tutorial at:
 - donor.com/manuals/reportware/tutorial
- donor.com Support
- inetsoftware
 - www.inetsoftware.de – Crystal Clear Home Page
- W3schools tutorials
 - www.w3schools.com
 - www.w3c.org