

# ReportWare Overview

May 2, 2008

donor.com Community Conference

**Presenter:**

**Jon Rockhold**

- Agenda
  - What is ReportWare?
  - Features
  - New Updates
  - How can I use ReportWare?
  - How do I get more information?
  - How do I get started?

# 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 Environment

- 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, other than Crystal Clear

## 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

Use  
ReportWare  
API's

```
use strict;  
use DonorWare::Logic::Account;  
use DonorWare::App::ReportWare;  
use DonorWare::Common::MailUtils;
```

```
use Data::Dumper;
```

```
my $account = DonorWare::Logic::Account->new();  
my $reportware = DonorWare::App::ReportWare->new();  
my $mailer = DonorWare::Common::MailUtils->new();
```

```
my $debug = 0;
```

```
# Load arguments from de0100  
my $args = load_args(\@ARGV);  
print Dumper($args) if $debug;
```

```
# verify required params exist
```

```
# run reports to disc  
my @attachments; # track the fields to be attached later...
```

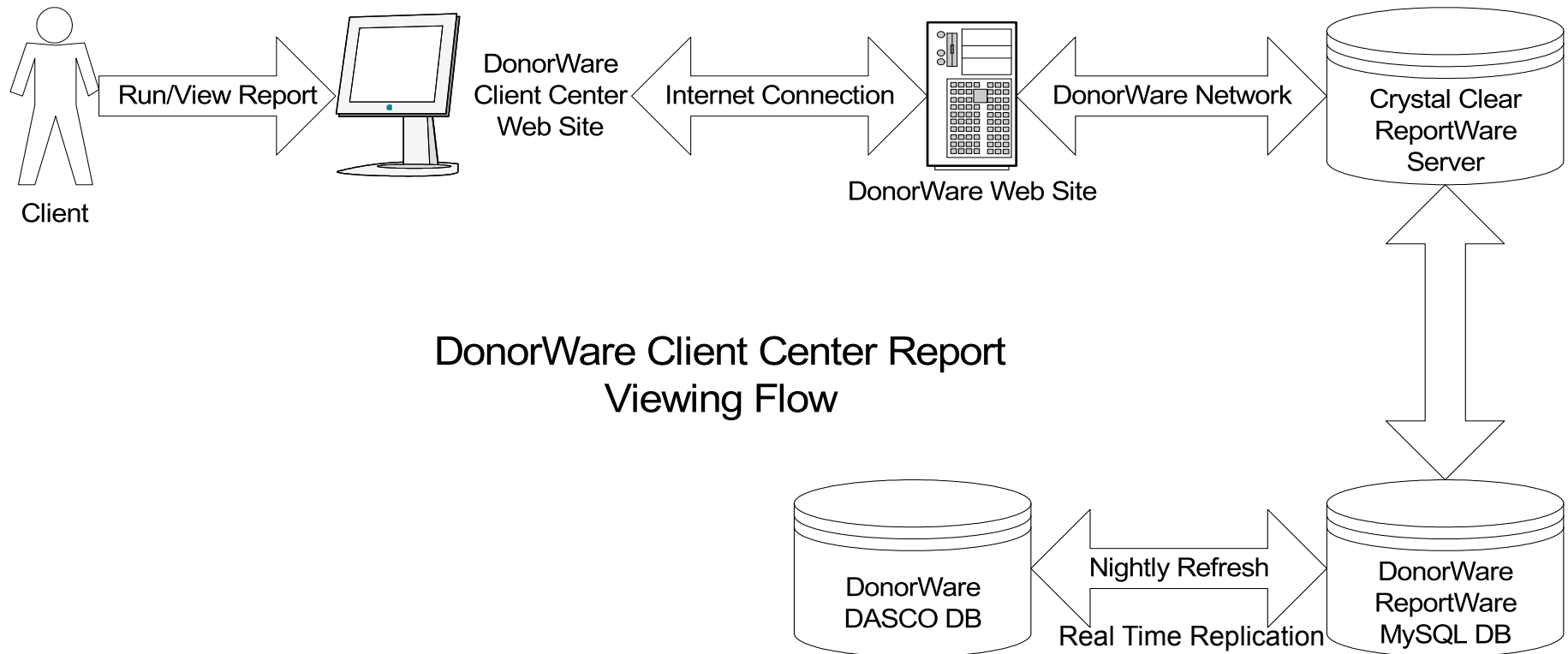
```
# Report 1 - DonorWare Services Agreement  
my $dsa_rpt = $reportware->run_report(  
    report => 'NewServicesAgreement.rpt',  
    format => 'pdf',  
    client => 'VICCI',  
    promptclient_id_code=> $args->{org_id},  
    return_contents => 1,  
    auth_token => $ENV{AUTH_TOKEN},  
);
```

Call  
specific  
ReportWare  
API

- 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

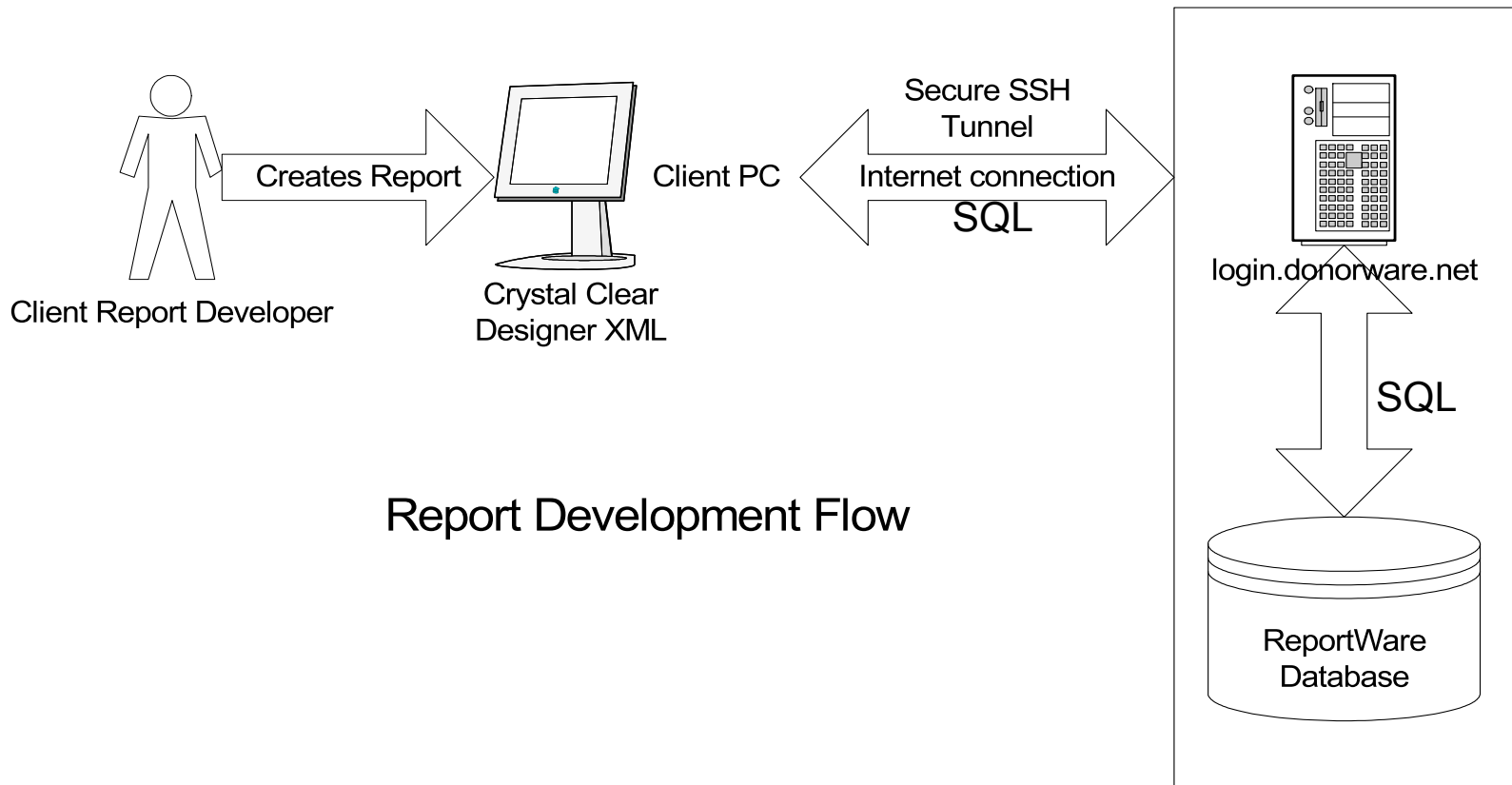
# Architecture

## ReportWare User Environment

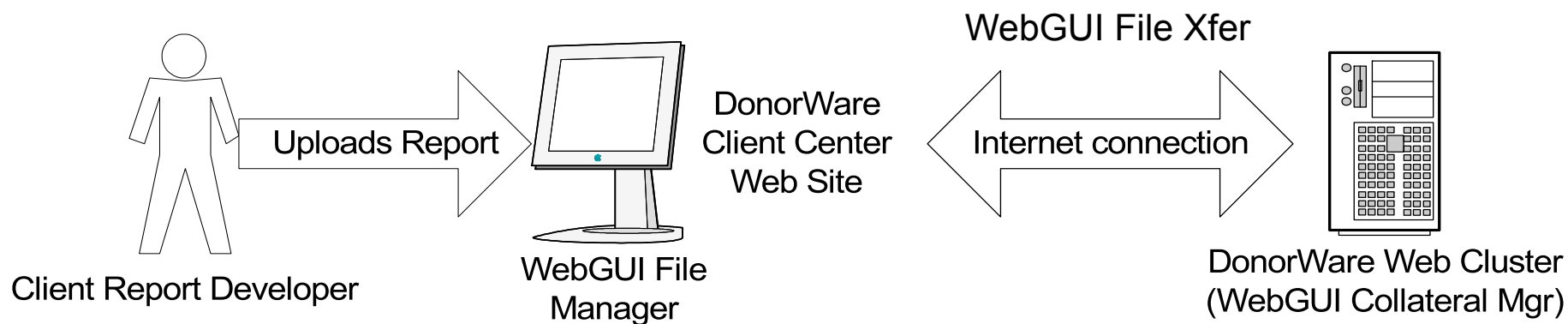


DonorWare Client Center Report Viewing Flow

# Architecture Report Development Environment



Report Development Flow



## Report Uploads/Client Center Maintenance

- 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

- 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

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



# Crystal Designer

i-net DesignerXML

Report1 - /Users/jon/DonorWare/DIRECTOR Info/2008 Conference/2008Reports\_79\_format/D3AccountProfile.rpt

Design Result

Report Header

Page Header -

Page Header

Detail - a

Detail - b

Detail - c

Detail - d

Detail - e

Detail - f

Detail - g

Detail - h

Detail - i

Fields Report

- Database Fields
- Formula Fields
- Group Name Fields
- Parameter Fields
- SQL Expression Fields
- Special Fields
- Summary Fields

Report Header	1	2	3	4	5	6	7	8		
Page Header -	Date: ] Print Date . . . ]				@D3Title					
Page Header	. . . ]				] @PageNoFM . . . ]					
Detail - a	name	idcode:	idCodeFmt	Salutation:	Salutation	His Name:	@HisSelf	Her Name:	@HerSelf	
Detail - b	@AddressBlock									
Detail - c	Primary Phone:	phone_number . . . ]	Email:	@FmtEmail						
Detail - d	PhoneSupplementals									
Detail - e	Source:	source_date	@SrcMotiv							
Detail - f	Type of Name:	@TON	Income Center:	@IncomeCenter	Mail Restriction:	@MailRestrictionCode	VIP Code:	@VipCode	Notify:	@Notify
Detail - g	Flags	Flag Value:	@1 @2 @3 @4 @5 @6 @7 @8 @9 @10 @11 @12 @13 @14 @15 @16 @17 @18 @19 @20 @21 @22							
Detail - h	Flag Number:	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22								
Detail - h	First:	Date	Amount	Designation	Motivation					
Detail - h	First:	first_gift_date	first_gift_am	@FirstDesg	first_gift_motv					
Detail - h	Largest:	big_gift_date	big_gift_am	@BigDesg	big_gift_motv					
Detail - h	Last:	last_gift_date	last_gift_am	@LastDesg	last_gift_motv					
Detail - i	Giving Summary									



# Rendered Report

i-net DesignerXML

Report1 - /Users/jon/DonorWare/DIRECTOR Info/2008 Conference/2008Reports\_79\_format/D3AccountProfile.rpt

Design Result

1 / 2 100%

Report1

**DASCO 3 Account Profile - ACME Ministries**

Date: April 30, 2008 Page 1 of 2

**Diane Kuehl**  
1234 Main Street  
Redlands, CA 92374

Idcode: 14-0223  
Salutation: Diane  
His Name: Mr Right  
Her Name: Lady Diane

Primary Phone: PHN 888/888-8888 C Cell  
Email: [diane@donorware.com](mailto:diane@donorware.com) 09/19/03

Source: 06/19/2003 I000-CNXX - Inquiries - Chuck Nelson  
Type of Name: 10 - Individual or Couple  
Income Center: N/A  
Mail Restriction: 5 - Quarterly Mailing Only  
VIP Code: N/A  
Notify: N/A

**Flags**

Flag Value	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	08/18/2003	\$ 165.54	99910 - Missionary - Harry Johnson	8874-LA01
Largest	12/31/2003	\$ 165.54	99910 - Missionary - Harry Johnson	8874-LA01

- Crystal Clear 7.9
  - New chart tool (similar interface)
  - New properties manager
  - Data Source Manager
  - New java viewer
  - Ability to stop the query

## ReportWare Components, cont.

- My donor.com Client Center
  - Utilizes WebGUI Content Manager
  - Simple interface
  - Secure
  - Allows Report Grouping
- Scalable donor.com Web Cluster
  - Scalable
  - Secure
  - Load balanced

- MySQL Read Only Reporting Database
  - Updated on a nightly basis from DASC0 (UNIFY)
  - Real time replication (MySQL)
  - Secure
  - Flexible
  - Queries do not affect the DASC0 transactions
- MySQL Replication now supersedes the older copy2mysql (requires DASC0 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

Google

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...


























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
ACMEfstlgstgift.rpt [ download template ]	    	First/Largest Gift Report	2/20/2008
dm9990.rpt [ download template ]	    		2/20/2008

Done

donor.com 1.242s N 1 service warning 0:13

- 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)

- Learning the Crystal Clear Designer XML report design tool
- Professional Services can jump start you on this
- Helpful to have a background with other report writers and/or SQL
- Understand basic database concepts (select, joins, etc)

- 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](http://donor.com/manuals_reportware)
  - donor.com ReportWare Discussion Forum

- Bibliography of useful resources
  - See ReportWare and You tutorial at:
    - [donor.com/manuals/reportware/tutorial](http://donor.com/manuals/reportware/tutorial)
- donor.com Support
- inetsoftware
  - [www.inetsoftware.de](http://www.inetsoftware.de) – Crystal Clear Home Page
- W3schools tutorials
  - [www.w3schools.com](http://www.w3schools.com)
  - [www.w3c.org](http://www.w3c.org)
- Books
  - SQL for Dummies