



Advanced Ad Hoc Reporting

Stuart M. Revness
President, SMR Consulting, Inc.
www.smrglobal.com

Session Overview

- New Features in 6.0
- Ad Hoc Reporting Overview
- Types of Reports
- Downloading / Charting
- Saving Reports

New Features in 6.0

- More in-depth formatting for date, currency, and code table fields
- Expanded cross-folder access to fields
- Customizer fields now listed with parent record
- Add columns more than once
- Calculated columns
- Save report format to Report Library
- Global report settings
- Choice of report type

Ad Hoc Reporting Overview

- Find
 - Quick Find
 - Advanced Find
- Format
 - Column headings
 - Sorting / Grouping
 - Page Layout
 - Etc.
- Print
 - Preview
 - Print
 - Save

Ad Hoc:

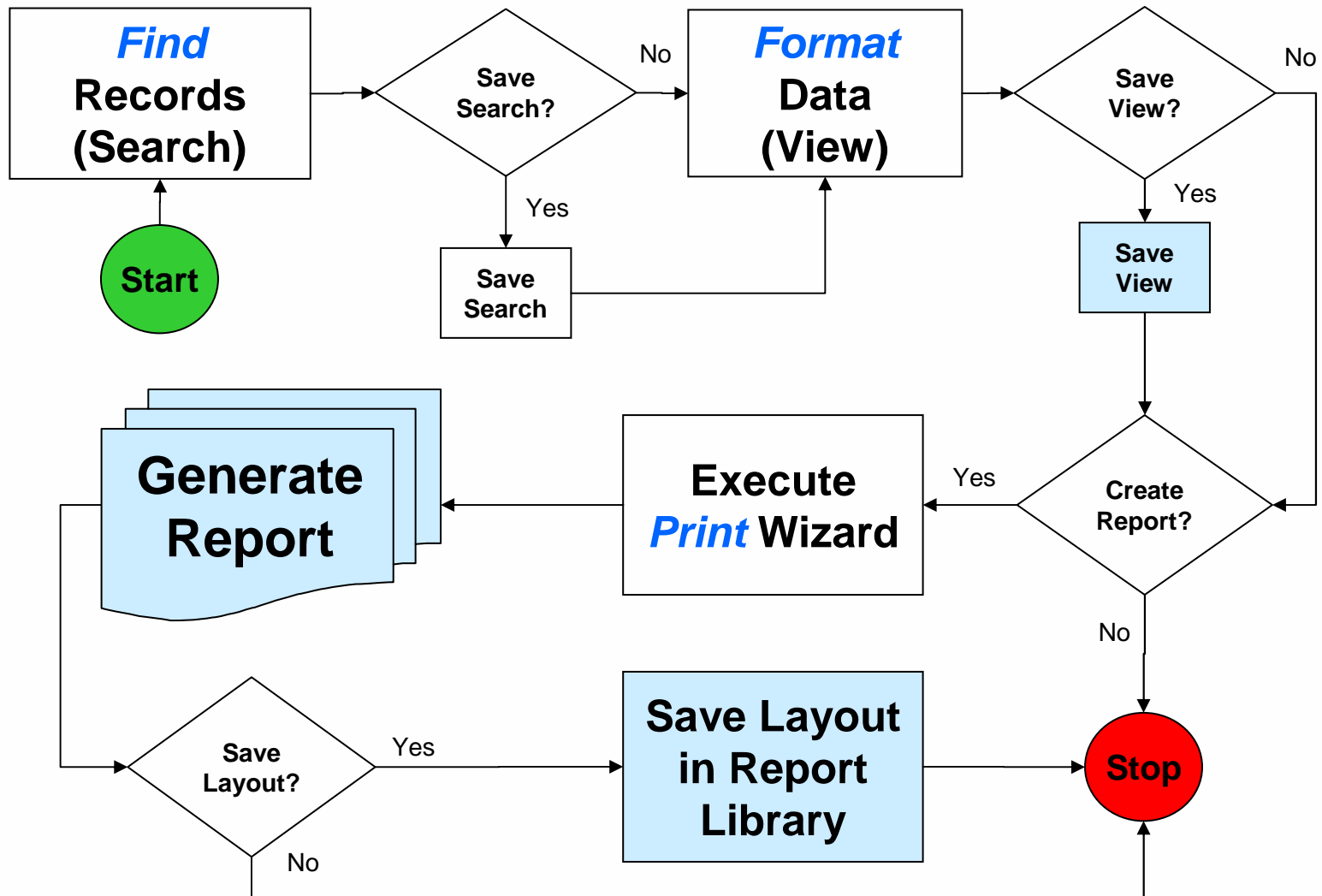
“Contrived purely for the purpose in hand rather than planned carefully in advance”

- Dictionary.com

Ad Hoc Terminology

TERM	KEY POINTS
Search (Find)	<ul style="list-style-type: none"> • Used to find record(s) • Two options: Quick Find & Advanced Find • Available in: Organizer & Report Library • Can be saved
View (Format)	<ul style="list-style-type: none"> • Used as “filter” to show specific criteria, formatting on screen • Use as basis for Saved Report • Change view to change display on screen • Can be saved
Report Layout	<ul style="list-style-type: none"> • Fixed layout (“template”) for printing, saving to file • Created by end user • Saved in Report Library • Unaffected by changes in underlying view
Standard Report	<ul style="list-style-type: none"> • Fixed layout of information for printing, saving to file • Creating by MicroEdge • Saved in Report Library

Typical Reporting Flow

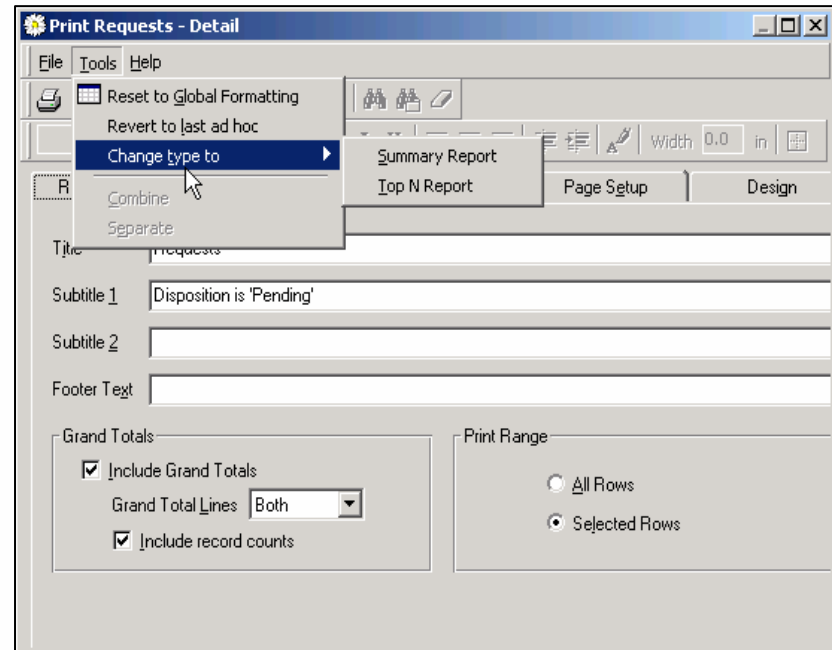




Types of Reports

Types of Reports

- Detail
 - Each record displayed in its own row
- Summary
 - Group headings and subtotals displayed rather than individual records
- Top N
 - Top (or bottom) 'N' individual records displayed based on selection criteria



Ad-Hoc Report Types

What Type of Report Should I Create?

REPORT	DECISION FACTORS
Detail Report	<ul style="list-style-type: none"> • Default report type • Displays detail on individual records in a row • Can be quite long depending on search criteria • Good for reporting on detailed items
Summary Report	<ul style="list-style-type: none"> • Not very detailed • Only includes fields that can be summarized • Good for analyzing trends • Good for reporting on a group of items (Type, Fund)
Top 'N' Report	<ul style="list-style-type: none"> • Can include detail for specific records • 'N' is the number of records you choose to display • Can also report on Bottom 'N' • Good for measuring high/low value grants

Detail Report Example

1. Displays individual records and selected fields
2. Groups records by Program Area
3. Calculates sub-totals by Program Area
4. Sorts by Organization Name within Program Area
5. Displays Grand Total

2006 REQUESTS BY PROGRAM AREA			
Organization Name	Disposition	Amount	% Total
Health and Human Services			
Abuse Prevention and Rehabilitation Fund	Pending	\$50,000.00	0.56%
Abuse Prevention and Rehabilitation Fund	Approved	\$350,000.00	3.95%
Arlington School of Dentistry	Pending	\$40,000.00	0.45%
Children International	Pending	\$10,000.00	0.11%
Children International	Pending	\$10,000.00	0.11%
Lower West Side Child Care Center	Pending	\$80,000.00	0.90%
<i>Total Health and Human Services (6 items)</i>		\$540,000.00	6.10%
Nanotechnology			
MIT Import Organization	Approved	\$4.00	0.00%
<i>Total Nanotechnology (1 item)</i>		\$4.00	0.00%
Grand Totals (58 items)		\$8,850,690.00	100.00%

Detail Report Example

Summary Report Example

- Only summary data:
 - Program Area
 - Amount
 - % of Total
- No sorting option
 - Default sorting by initial group
- Common uses:
 - Types
 - Coding Sheets

2006 Conference Request Summary		
Program Area	Amount	% Total
<u>No code specified</u>	\$2,228,359.00	25.18%
<u>Arts and Culture</u>	\$1,516,000.00	17.13%
<u>Civic and Community</u>	\$4,050,000.00	45.76%
<u>Education</u>	\$516,327.00	5.83%
<u>Health and Human Services</u>	\$540,000.00	6.10%
<u>Nanotechnology</u>	\$4.00	0.00%
Grand Totals (58 items)	\$8,850,690.00	100.00%

Summary Report Example

Top N Report Example

- Rank option can be added
 - Table = Default
 - Field = Rank
- Report can be sorted but not grouped
- Sort 'Ascending' to get Bottom N report

Top 10 Requests by Grant Amount

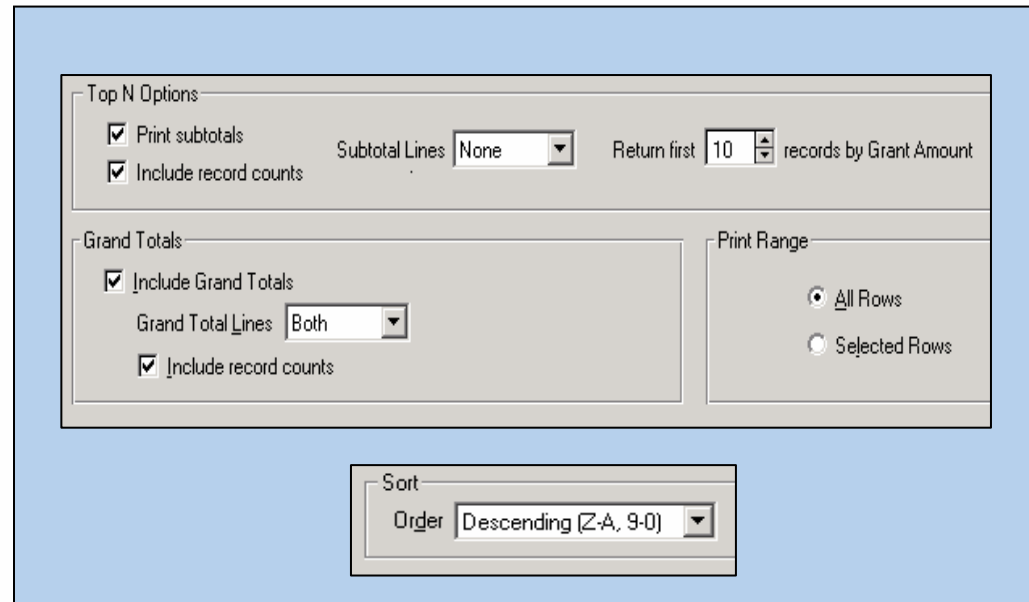
2005-2006

Rank	Organization Name	Grant Amount	% of Total
1	Teen Aid Center	\$1,500,000.00	21.76%
2	Kids With AIDS Research Center	\$1,000,000.00	14.51%
3	Sunflower House for Youth in Distress	\$775,000.00	11.24%
4	Children International	\$770,000.00	11.17%
5	National Institute for Technical Learning Coalition	\$500,000.00	7.25%
6	Lower West Side Child Care Center	\$467,000.00	6.78%
7	New York Youth Sing for Peace	\$375,000.00	5.44%
8	Abuse Prevention and Rehabilitation Fund	\$350,000.00	5.08%
9	University of America	\$225,000.00	3.26%
10	University of America	\$150,000.00	2.18%
<i>Subtotal (10 items)</i>		<u>\$6,112,000.00</u>	<u>88.68%</u>
Grand Totals (34 items)		<u>\$6,892,189.00</u>	<u>100.00%</u>

Top 10 Report by Grant Amount

Top N Report Options

- Include counts and subtotals
- Choose # of records to return
- Include grand totals
- Select rows
- Choose sort order:
 - Ascending
 - Descending



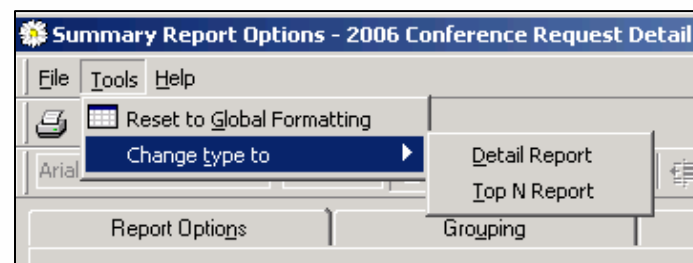
The screenshot shows a dialog box titled "Top N Formatting Options" with the following settings:

- Top N Options:**
 - Print subtotals
 - Include record counts
 - Subtotal Lines:
 - Return first: records by Grant Amount
- Grand Totals:**
 - Include Grand Totals
 - Grand Total Lines:
 - Include record counts
- Print Range:**
 - All Rows
 - Selected Rows
- Sort:**
 - Order:

Top N Formatting Options

Changing Report Types

- Change from one Type to another, but:
 - Report Wizard tabs (and order) may change
 - Available options may change
- Change Type option found in Print Requests – Detail Window under:
 - Tools > Change Type to >
 - Summary Report
 - Top N Report



Changing Report Type

When in doubt...save a copy of the current report, *THEN* change type!

Changing to a Summary Report


Converting TO a Summary Report :

- Report Options: no change
- Page Setup: no change
- Columns
 - Columns are removed that:
 - Don't display numbers or currency
 - Display data from folders **other** than the current folder
 - » Example: Contact data will be removed from a Payment report
 - Column gaps due to removed data are closed
- **Sorting/Grouping**
 - Sorting is not available
- Design
 - Design elements available in new report will be carried over



Downloading & Charting

Downloading Data to Excel

Click Export to Excel  button in Organizer toolbar

1. Choose formatting options

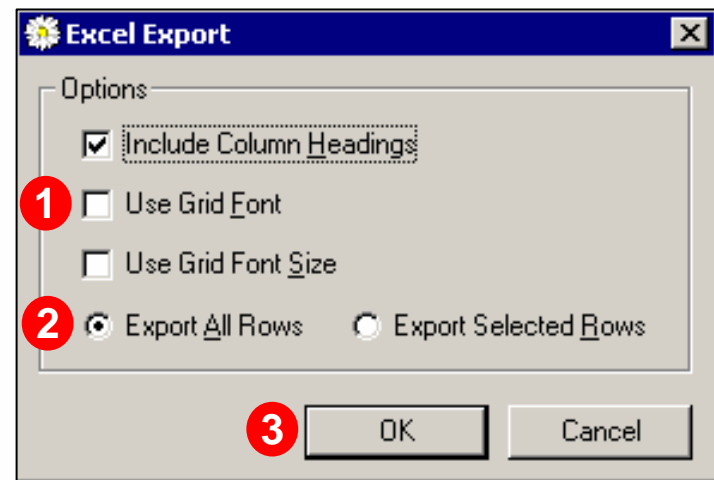
- Include Column Headings
- Use Grid Font
- Use Grid Font Size

2. Select desired rows

- Export All Rows
- Export Selected Rows

3. Click OK


- Download to HTML  for static content

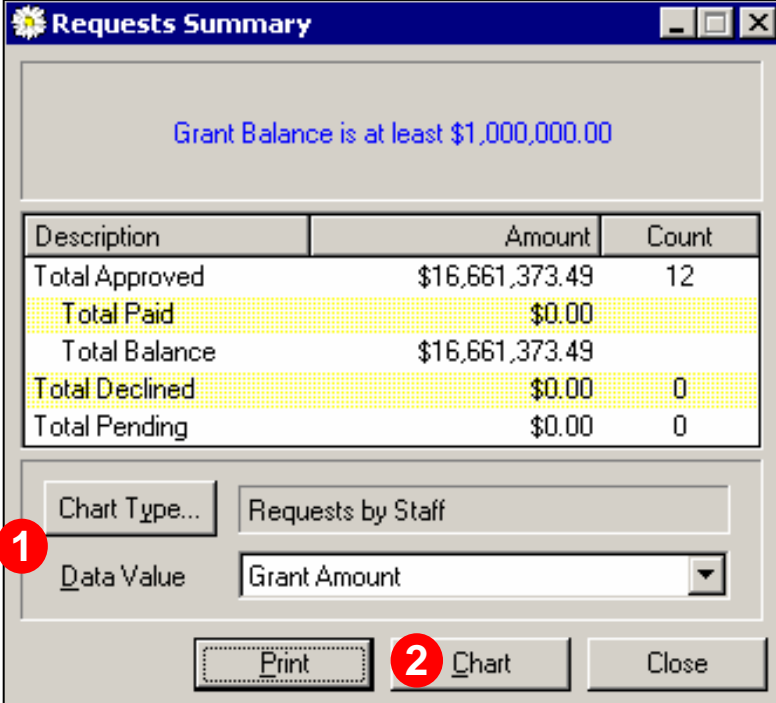


Exporting Search Results to Excel

Export data to Excel for complex calculations, pivot tables, consolidated reporting, etc.

Summarizing and Charting Results

- Summary button calculates pre-defined totals for records displayed
 - Dollar amounts
 - Record counts
- Provides access to charting tool based on coding values, record types
- To use Summary:
 - Run Search
 - Click Summary  button
- To generate Chart:
 1. Select Chart Type, Data Value
 2. Click Chart button



Grant Balance is at least \$1,000,000.00

Description	Amount	Count
Total Approved	\$16,661,373.49	12
Total Paid	\$0.00	
Total Balance	\$16,661,373.49	
Total Declined	\$0.00	0
Total Pending	\$0.00	0

Chart Type... Requests by Staff

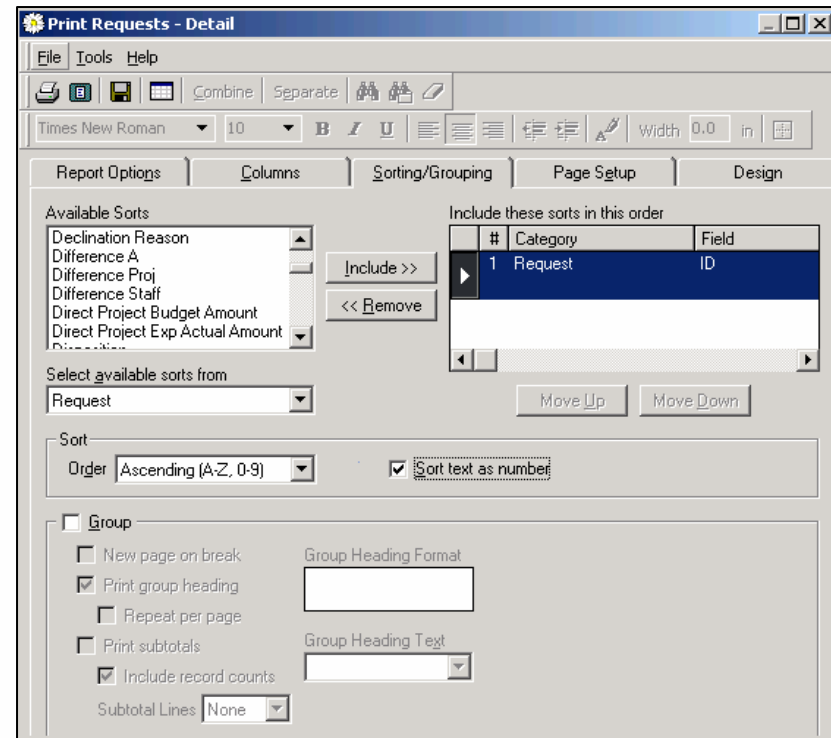
Data Value Grant Amount

Print Chart Close

Summary of Request Data

Sorting Text as Numbers

- GIFTS stores some “numbers” as text:
 - Request ID
 - Reference number
 - Tax ID
- Sorting as text can create unexpected results
- Sort as number to order sequentially



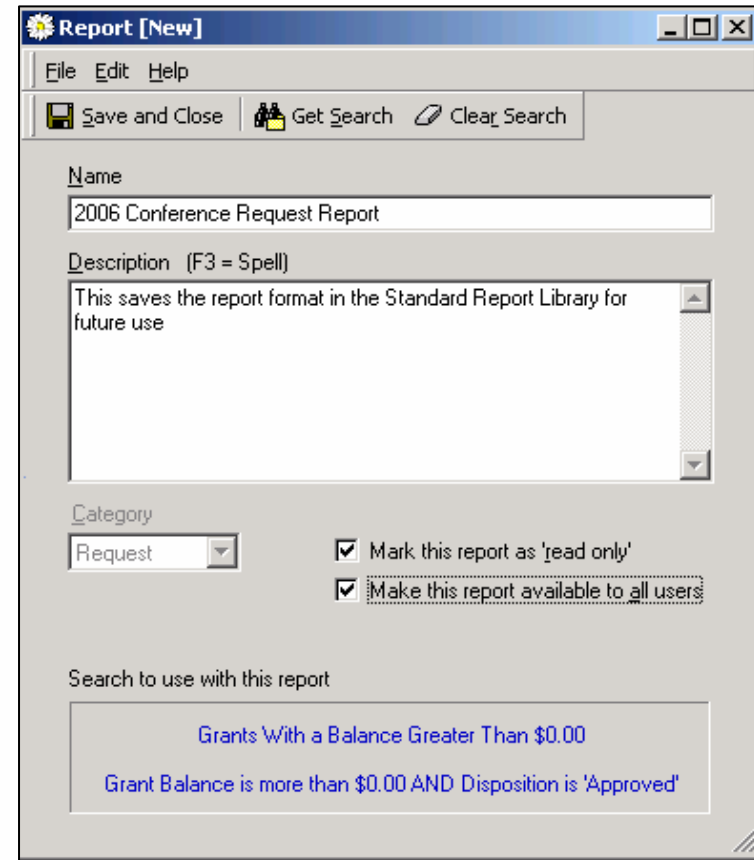
Sort Text as Number



Saving Reports

Saving a Report

- Save a report format to Report Library
- Attach a Saved Search
- Use the report format again with new search criteria
- Prevent changes



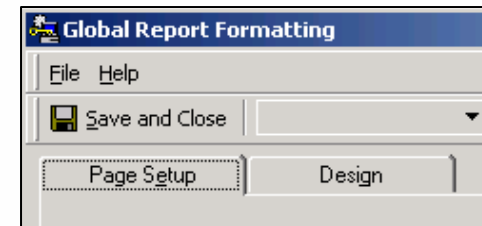
Saving a Report to the Report Library

Saved Report Features

- **Active Report Viewer:** displays report
- **Table of Contents:** outlines grouping
- **Find:** locate specific content
- **Copy:** copy and paste a report page
- **View:** multiple pages simultaneously
- **Print:** standard print options
- **Export:** several formats available
 - ASCII
 - HTML
 - XLS
 - PDF
 - TIF
 - RTF

Global Formatting

- Creates a similar style for all reports
- Set in Administrator Module
- Page Setup Tab:
 - Paper layout
 - Margins
 - Report date
 - Page Numbers
 - Header/footer
- Design Tab
 - Set text, border defaults



Global Formatting Tabs in Admin Module



For more information, contact:

Stuart M. Revness

srevness@smrglobal.com

610-517-0750

www.smrglobal.com