



Basic Ad Hoc Reporting

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Session Overview

- Ad Hoc Reporting Overview
- Finding Data
- Formatting Reports
- Generating Report Output
- Standard Report Library
- What's New in 6.0

Ad Hoc Reporting Overview

1. Find
 - Quick Find
 - Advanced Find
2. Format
 - Data on the screen
 - Data in a report
3. Print
 - Preview
 - Print
 - Save

Ad Hoc:

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

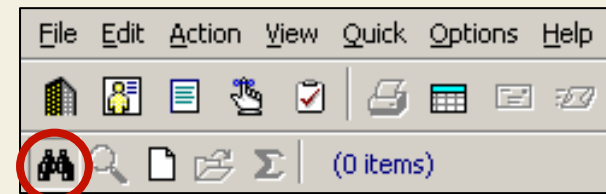
- Dictionary.com



Finding Data

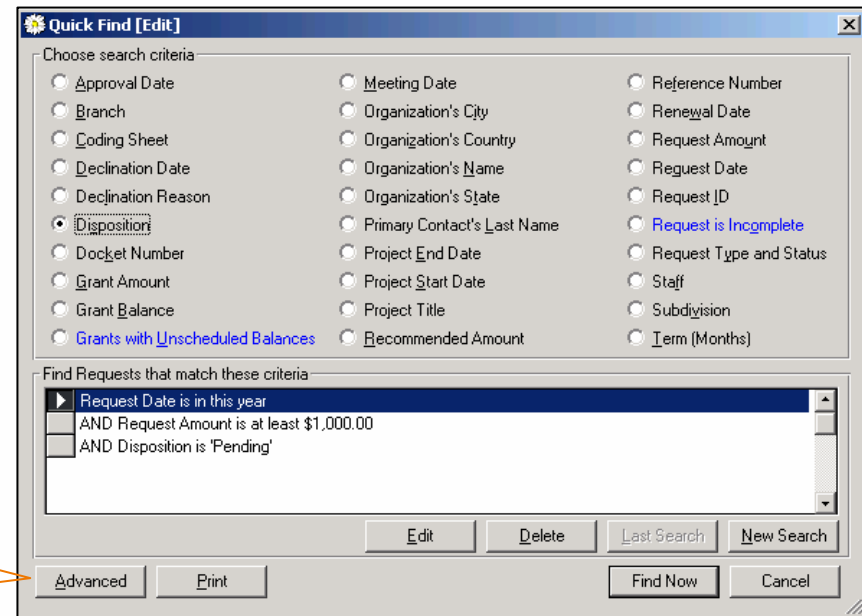
Quick Find: Simple Searches

Launch via the binoculars:



- Search criteria based on Organizer tab
- Build searches by:
 - Selecting fields
 - Selecting conditions
 - Entering values

Use Advanced Find for more complex searches

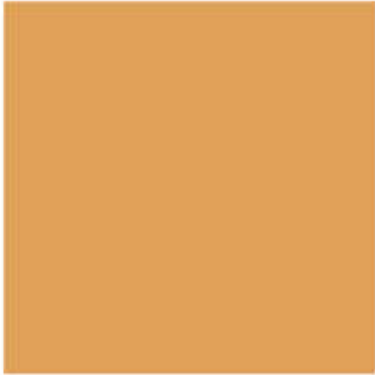


Request Quick Find Fields

Sample Organizer After Quick Find

	Disposition	Type/Status	Organization	Req/Granted	Project Title	Fund/Program	ID/Ref	Audit
	Pending 2/2/2006	Cash Grants Considered	Abuse Prevention and Rehabilitation Fund	\$50,000.00	Education Campaign for Children for School	Foundation Health and Human	380	Created: 11/6/2001
	Pending 1/11/2006	Cash Grants Initial	Adventure Club of Manhattan Adrienne Vittori	\$5,000.00	Make A Wish Project		577	Created: 1/4/2006
	Pending 5/1/2006	Cash Grants Considered	American Foundation for Children Martin Doyle	\$85,000.00	Toward the cost of renovations to the	Foundation Civic and Community	381	Created: 11/6/2001
	Pending 6/1/2006	Cash Grants Staff	American Foundation for Children Martin Doyle	\$37,750.00	Flexibility Learning on the Web	Foundation Education	525	Created: 7/8/2005
	Pending 5/5/2006	Cash Grants Considered	Arlington School of Dentistry Anita Rayse	\$40,000.00	Cap and Crown Seminar	Foundation Health and Human	506	Created: 12/28/200
	Pending 1/5/2006	Dinners and Events	Big Brothers Big Sisters of New York City	\$20,000.00	Celebrate New York	Corporation Civic and Community	434.02	Created: 7/13/2005
	Pending 6/3/2006	Cash Grants Considered	Big Brothers Big Sisters of New York City	\$20,000.00	"Bowl For Kid's Sake" fundraising program	Foundation Education	505	Created: 12/28/200
	Pending 10/31/2006	Cash Grants	Big Brothers Big Sisters of New York City	\$9,000.00	Multi-year grant Example		606	Created: 9/17/2006
	Pending 4/14/2006	Cash Grants Considered	Brooklyn Ballet Margaret Neff	\$2,000.00	Spring Dance Recital	Foundation Arts and Culture	282.02	Created: 12/28/200
	Pending 1/1/2006	Cash Grants Considered	Brooklyn Ballet Margaret Neff	\$2,000.00	Annual Support	Corporation Arts and Culture	428.02	Created: 9/30/2002

Ad Hoc Report from Request Tab with Default Column Settings



Formatting Reports

Preparing Ad-Hoc Reports

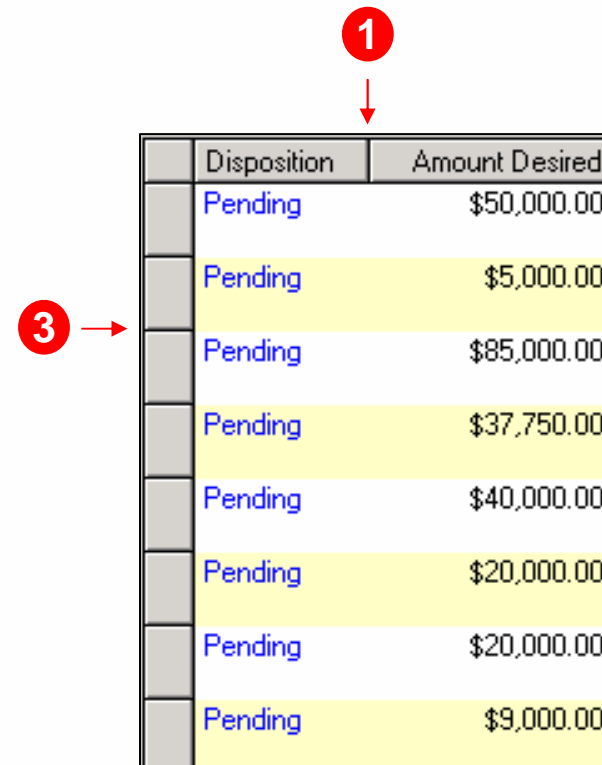
- Search results can be formatted and printed
- Format results by changing:
 - Column sizes
 - Column headers
 - Fields displayed
 - Sort order
- Save the format for future use

Disposition	Amount Desired	Request Date	Project Title
Pending	\$50,000.00	2/2/2006	Education Campaign for Children for School Reform
Pending	\$5,000.00	1/11/2006	Make A Wish Project
Pending	\$85,000.00	5/1/2006	Toward the cost of renovations to the second floor of their Club for the creation of a Teen
Pending	\$37,750.00	6/1/2006	Flexibility Learning on the Web
Pending	\$40,000.00	5/5/2006	Cap and Crown Seminar
Pending	\$20,000.00	1/5/2006	Celebrate New York
Pending	\$20,000.00	6/3/2006	"Bowl For Kid's Sake" fundraising program
Pending	\$9,000.00	10/31/2006	Multi-year grant Example

Format Search Results for Output

Changing Column Size

1. Move cursor between column headers until cross appears
2. Click and drag column to resize width
3. Repeat procedure between rows to adjust row height
 - Row height is adjusted for ALL rows!

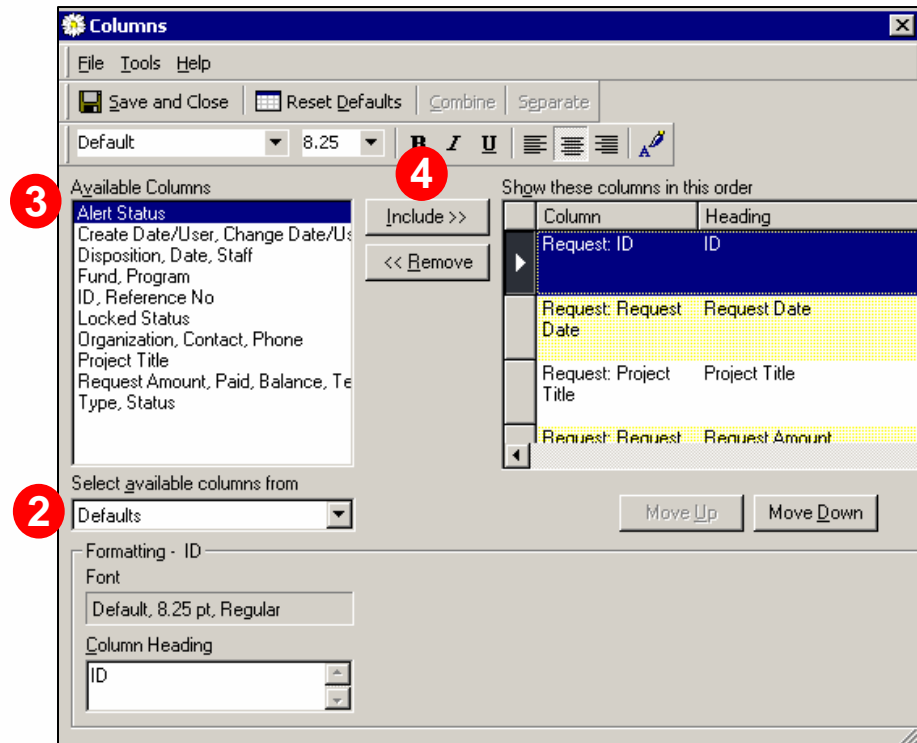


	Disposition	Amount Desired
	Pending	\$50,000.00
	Pending	\$5,000.00
	Pending	\$85,000.00
	Pending	\$37,750.00
	Pending	\$40,000.00
	Pending	\$20,000.00
	Pending	\$20,000.00
	Pending	\$9,000.00

Adjusting Column Width and Row Height

Changing Columns (Fields) Displayed

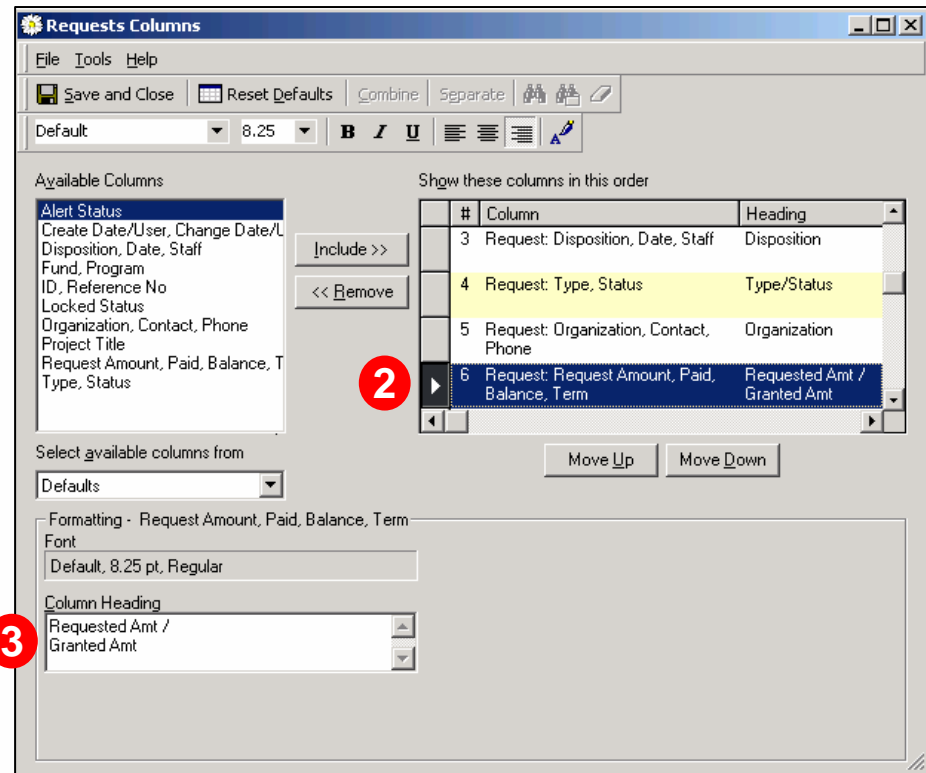
1. Choose View > Shows Columns from the menu bar
2. Select table:
 - “Select available columns from”
3. Select field:
 - “Available Columns”
4. Include / Remove column



Select Fields to Include in Column Display

Changing Column Headers

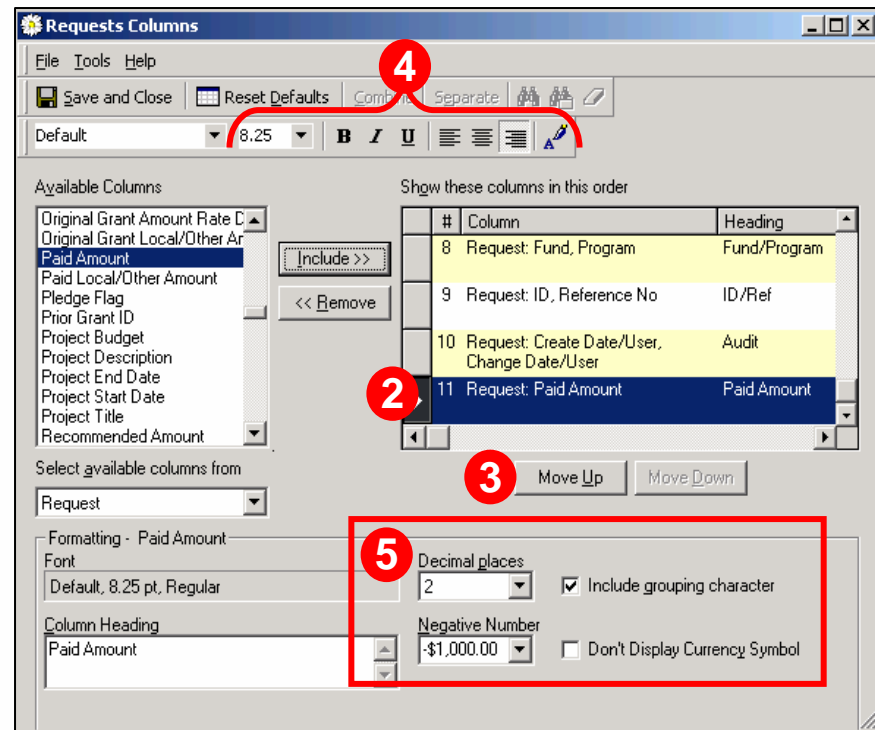
1. Choose View > Shows Columns from the menu bar
2. Select column
3. Edit column heading
 - For multi-line heading, separate lines with CTRL+ENTER



Change Column Headers in View > Show Columns Window

Changing Column Order, Format

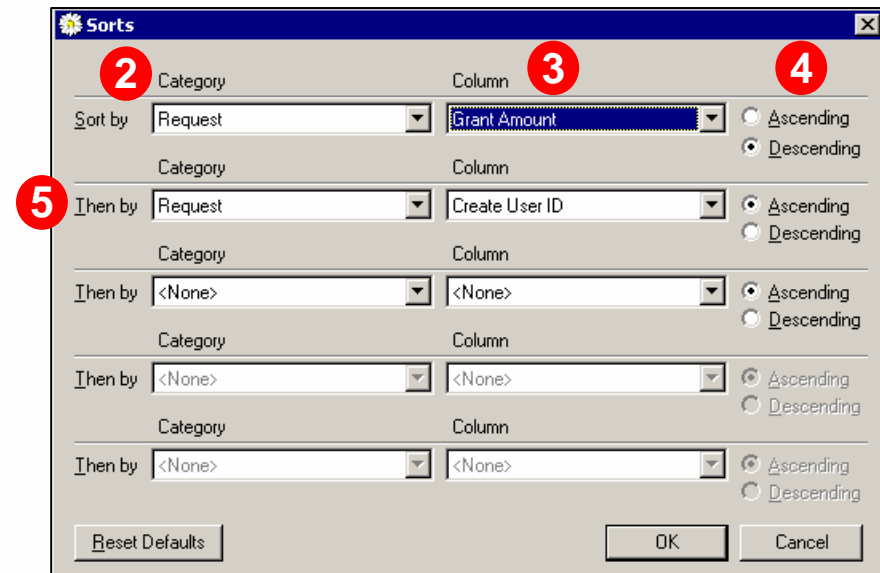
1. Choose View > Show Columns from the menu bar
2. Select column
3. Move Up/Down to change order of columns
4. Format column text
 - Font, Size, Bold, Justify...
5. Choose field-specific formatting options



Change Column Order, Formatting in View > Show Columns Window

Sorting Columns

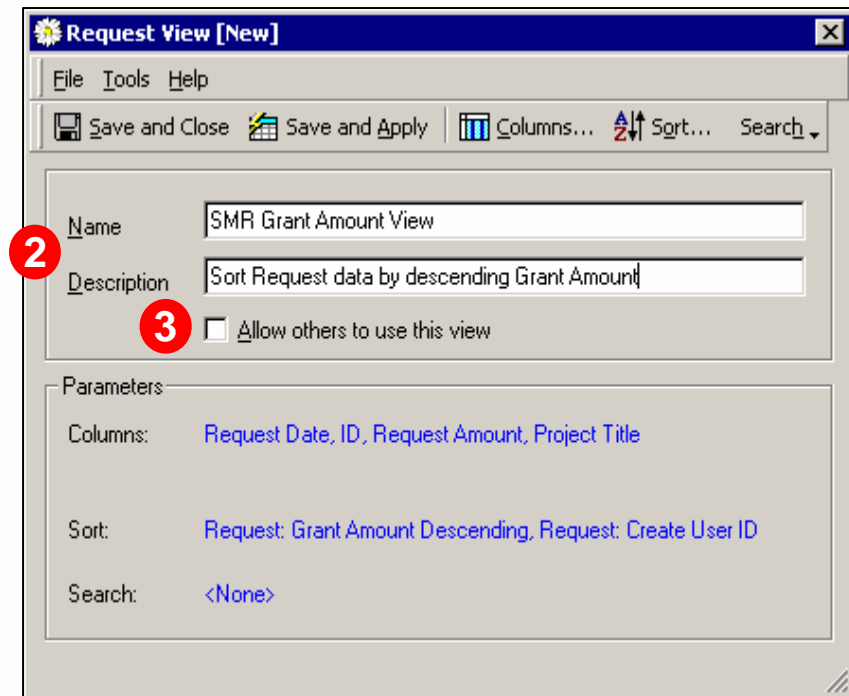
1. Choose View > Shows Sorts from the menu bar
2. Select table from Category
3. Select field from Column
4. Choose sort order:
 - Ascending
 - Descending
5. Add additional sorts as required



Changing Sort Order with View > Show Sorts

Saving Views

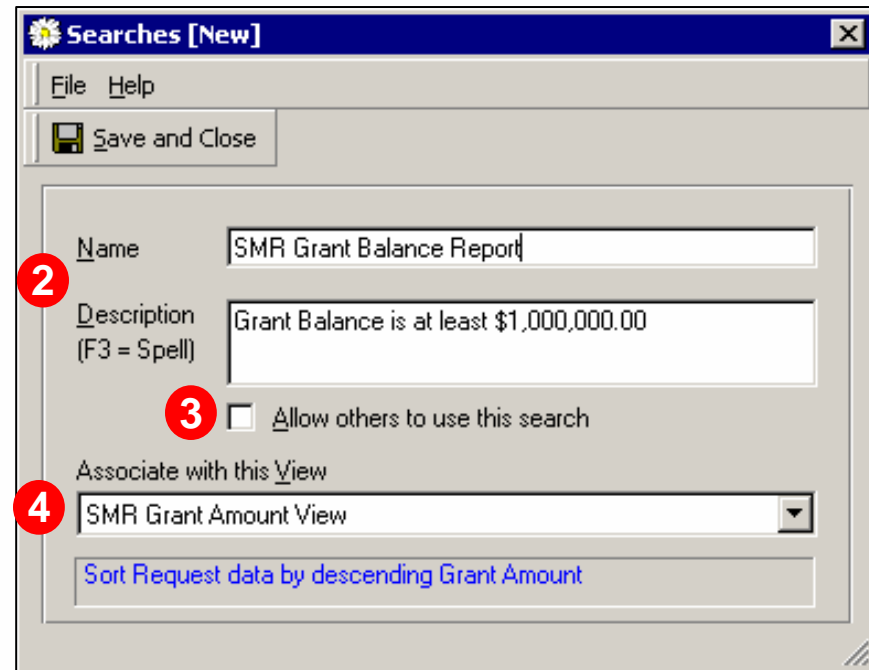
1. Choose View > Save Current View from the menu bar
2. Enter Name and Description
3. Share view if desired



Saving a View

Saving a Search

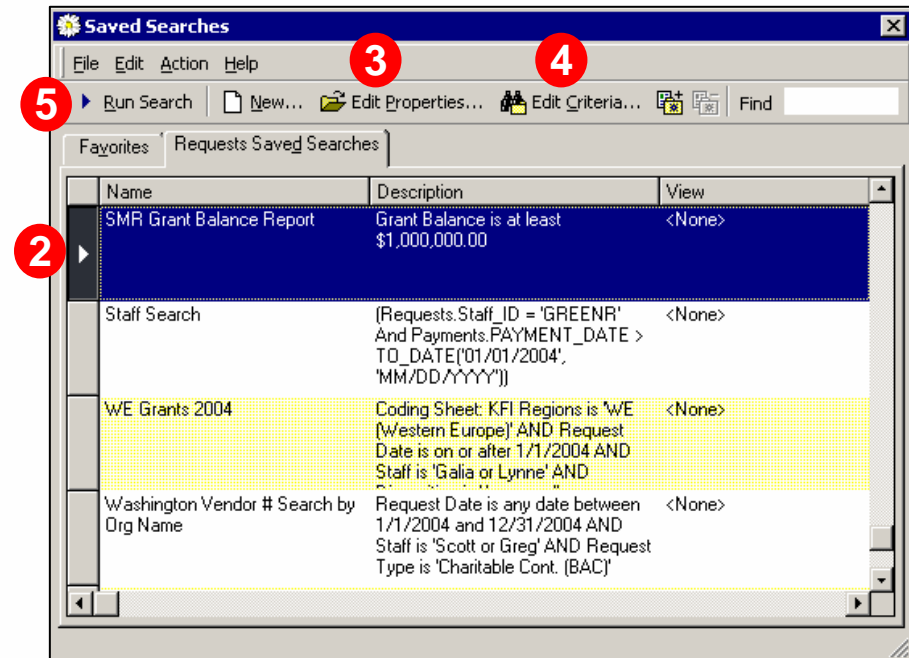
1. Save current search via Edit > Save Search
2. Enter a Name and Description for Search
3. Share Search as appropriate
4. Associate View with Search
 - Run Search, display formatted results in one step



Save Complex or Frequently Used Searches via Edit > Save Search

Running / Updating Saved Searches

1. Access saves searches via Edit > Get Search
2. Select the desired Search
3. Edit Properties to change:
 - Name
 - Description
 - Share status
 - Associated View
4. Edit Criteria to change search fields, conditions
5. Run Search



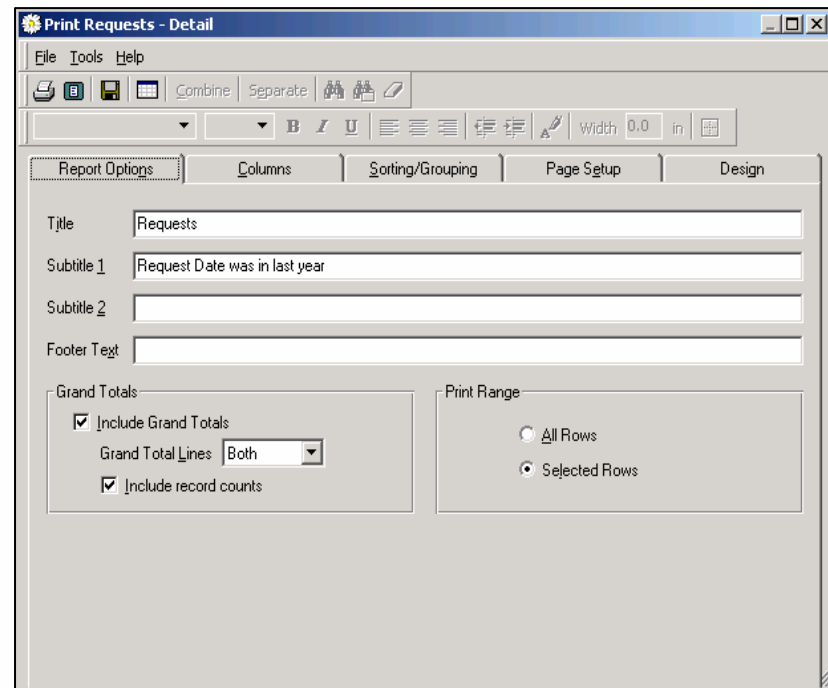
Access, Edit, and Run Saved Searches via Edit > Get Search



Generating Report Output

New Ad Hoc Print Wizard

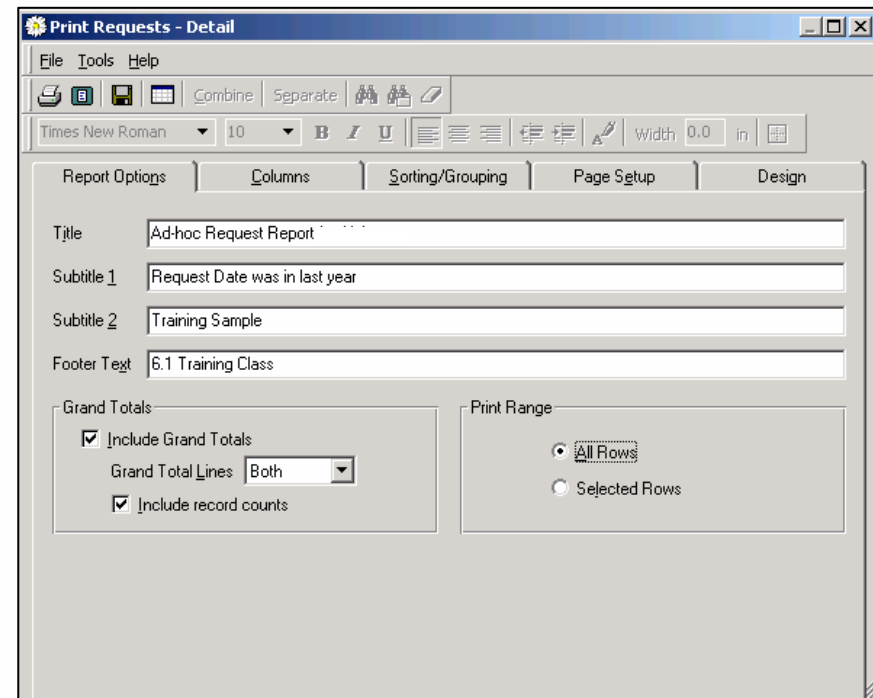
- Accessed via File > Print in menu bar
- 5 tabs:
 - Report Options
 - Columns
 - Sorting / Grouping
 - Page Setup
 - Design
- Save report in several formats
- ***Save report format in Report Library***



Ad Hoc Print Report Wizard

Print Wizard - Report Options Tab

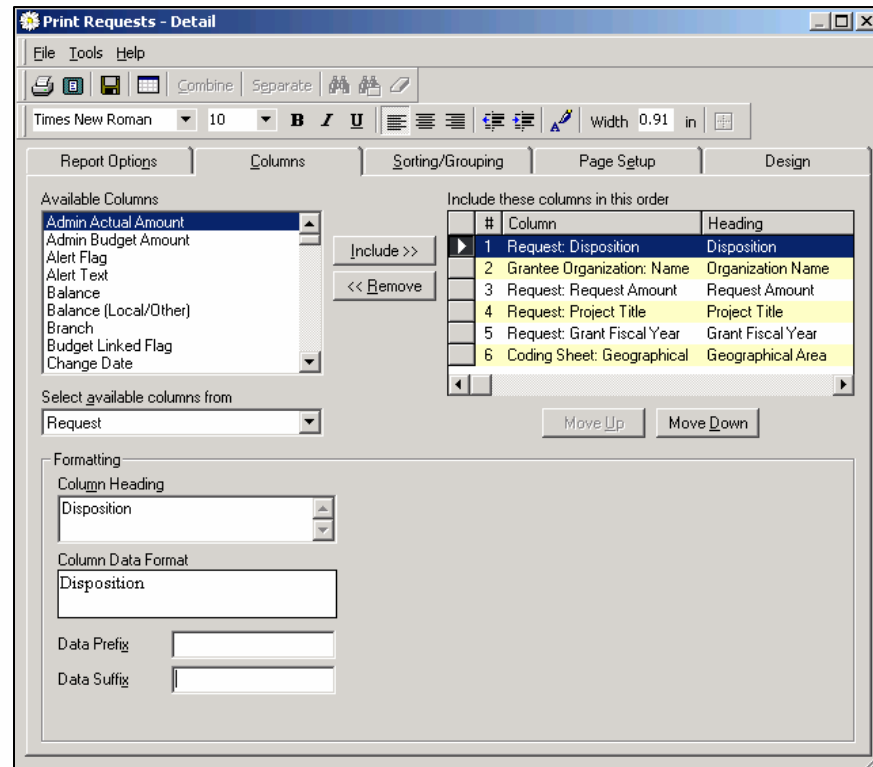
- Customize labels:
 - Titles
 - Sub-titles
 - Footers
- Include totals:
 - Grand totals
 - Record counts
- Remember to select rows



Ad Hoc Report Wizard: Report Options Tab

Print Wizard - Columns Tab

- Indent columns
- Adjust column width
- Add / remove fields
- Format heading and column data
- Add prefix / suffix
- Format:
 - Date
 - Currency
 - Coding sheet
 - Number



Ad Hoc Report Wizard: Columns Tab

Formatting Options

Number Options / Search Criteria

Number Options

- Include grouping character
- Include in totals
- Include percentage of total

Search Criteria

Paid Date was in last year

Coding Sheet Formatting Options

Coding Sheet Options

Display Code/Description: Description only | Code level to display: Level 5

Show parent codes | Delimiter between levels: \ (back slash)

Primary/Secondary Codes: Primary only | Delimiter between codes: {carriage return}

Date Formatting Options

Date Options

Date Format

Short Date

Short Date	6/19/2006
Long Date	Monday, June 19, 2006
Month Year	June 2006
Month Day, Year	June 19, 2006
Day Month Year	19 June 2006

Currency Formatting Options

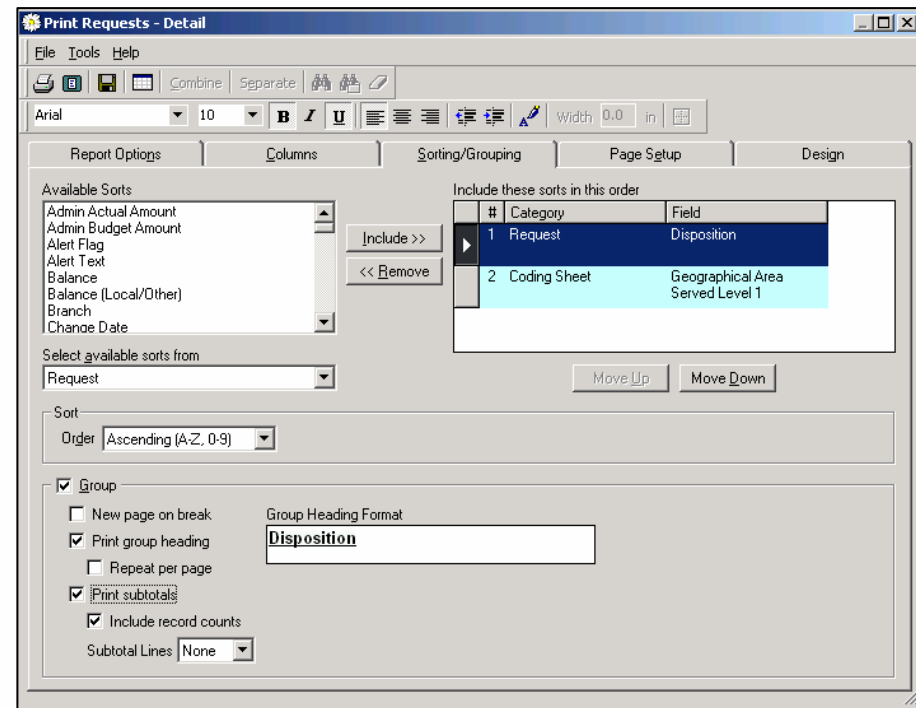
Currency Options

- Don't display currency symbol
- Include grouping character
- Include percentage of total
- Negatives in red
- Include in totals

Negative Number: -\$1,000.00 | Decimals: 2

Print Wizard - Sorting/Grouping Tab

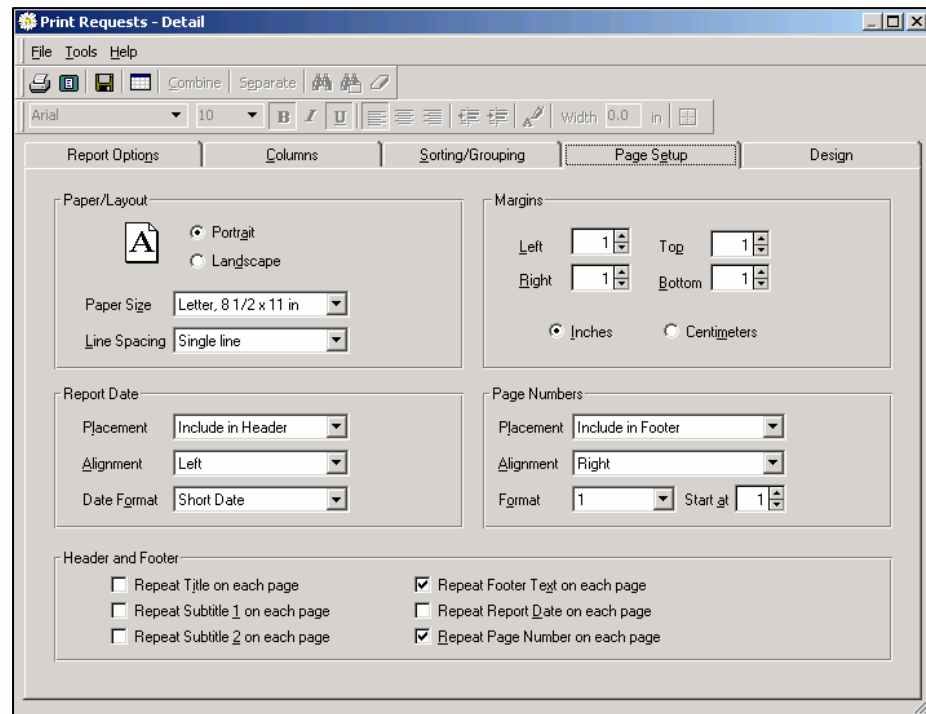
- Change sort options without returning to Organizer
- Group sorted fields
- Add sub-totals and record counts to grouped fields



Ad Hoc Report Wizard: Sorting/Grouping Tab

Print Wizard - Page Setup Tab

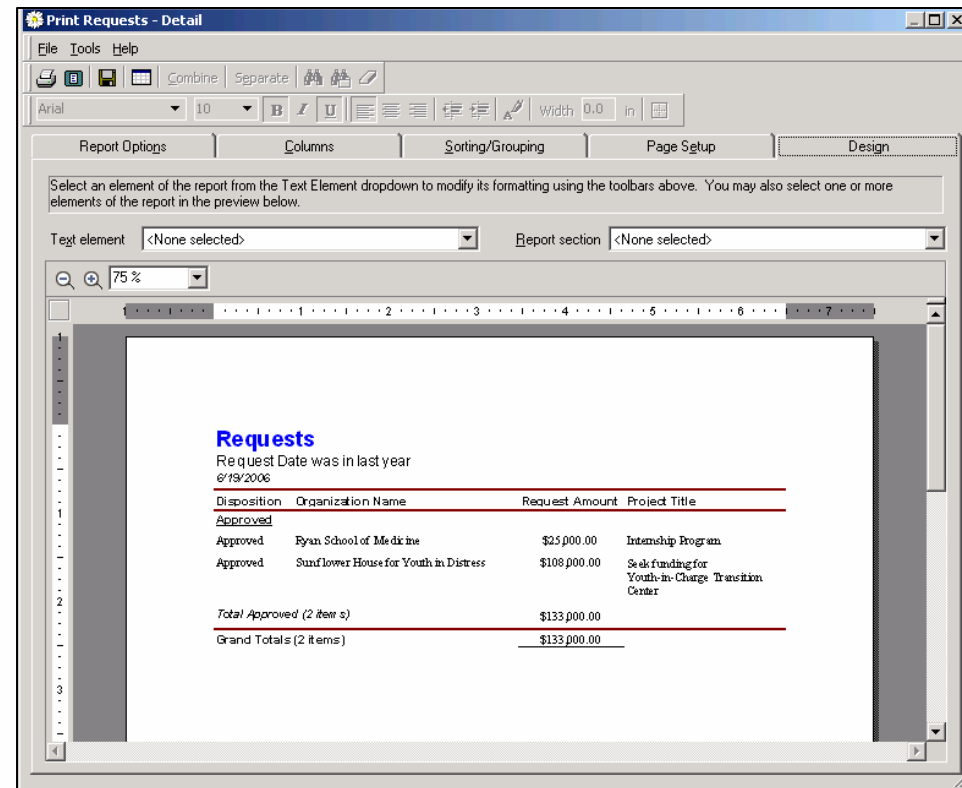
- Set page layout and formatting options
- Set margins
- Adjust date and page numbering options
- Select header and footer settings



Ad Hoc Report Wizard: Page Setup Tab

Print Wizard - Design Tab

- Preview report
 - First 2 records
- Adjust formatting:
 - Column width
 - Data format
 - Text alignment



Ad Hoc Report Wizard: Design Tab

Preview and Download Report

- File > Preview Report
 - Generate full report for viewing onscreen
- File > Export
 - Download report in desired format



Adobe Acrobat (PDF)

ASCII Text

Hypertext (HTML)

Image (TIF)

Microsoft Excel (XLS)

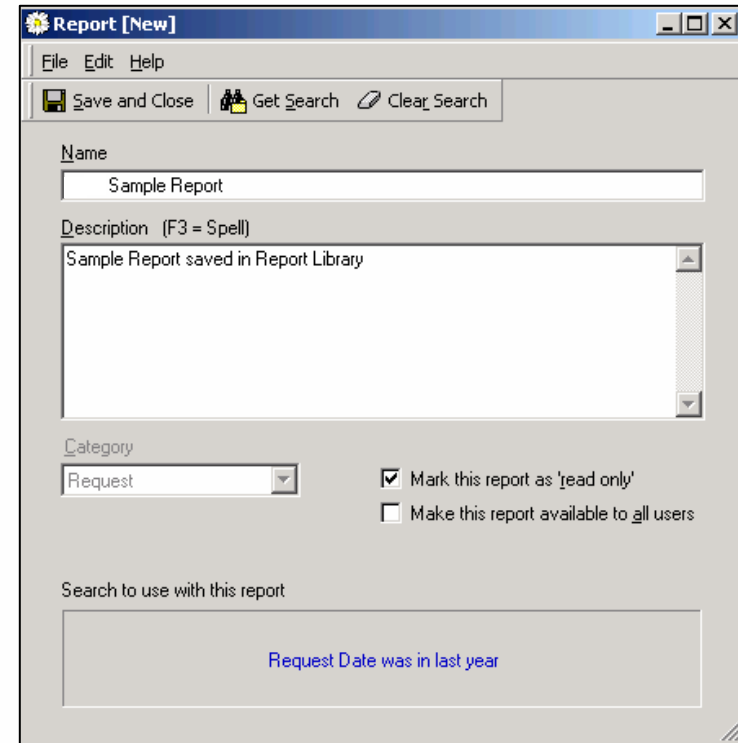
Microsoft Word (RTF)

Choose Format for Download

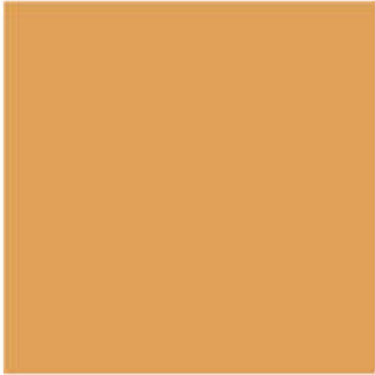
Save a Report as a PDF!

Save Report to Report Library

- Choose File > Save to Report Library
- Save Ad Hoc report “template” in Standard Report Library
- Use like any other Standard Report



Save Ad Hoc Report in Standard Report Library



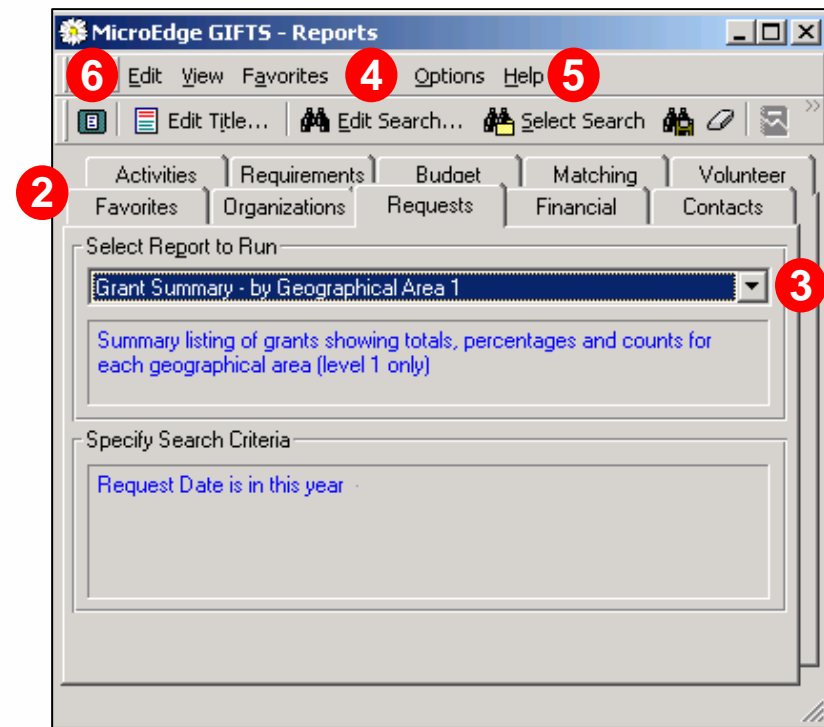
Standard Report Library

GIFTS Standard Report Library

- Includes dozens of pre-defined, common reports
- User-driver selection criteria enables custom content
- Standard templates deliver consistent data presentation
- Leverage Ad Hoc reporting engine
 - Quick Find
 - Advanced Find
- Available for:
 - Organizations
 - Financial (Payments, Budget)
 - Activities
 - Requests
 - Contacts
- Favorites can be saved!

Running a Standard Report

1. Choose View > Reports from menu bar
2. Select desired report tab
3. Select report
4. Edit search fields and conditions
 - Just like Quick Find!
5. Use “Select Search” to access saved Searches
6. Run report



Standard Report Selection Screen

Standard Report: Sample

Grant Summary - by Geographical Area 1

9/20/2006

Geographical Area	Grant Count	Grant Amount
No Code Specified	1	\$500,000.00
Midwest	1	\$770,000.00
Northeast	17	\$1,276,681.00
Southwest	4	\$395,000.00
Grand Total	<u>23</u>	<u>\$2,941,681.00</u>

Standard Report Sample:
Grant Summary by Geographical Area 1



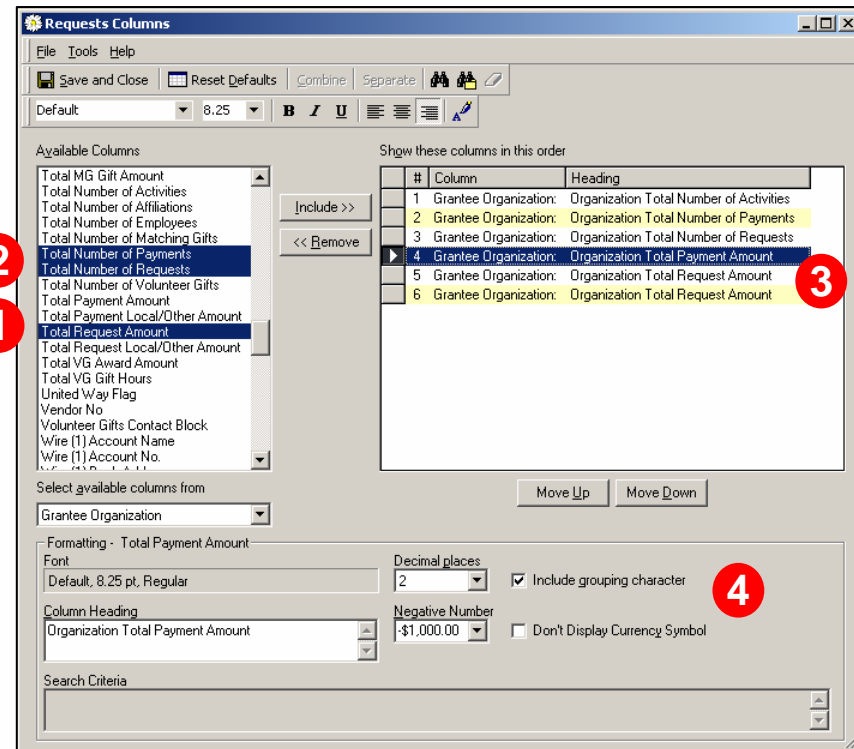
What's New in 6.0

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

View > Show Columns: Enhancements

1. New “Total” columns for Orgs, Requests, and Payments
2. Multi-select to add / remove columns
3. Add columns multiple times
4. Enhanced formatting for:
 - Currency
 - Coding Sheets
 - Dates



View > Show Columns Screen with New Features

“Total” Columns and Search Criteria

- New “Total” columns available in Request & Organizer folders
- Fields include
 - Total # requests
 - Total granted amount
 - Total payment amount
- Add the same field more than once
- Add search criteria to *each* field

Why add a field more than once?

Why add search criteria to a field?

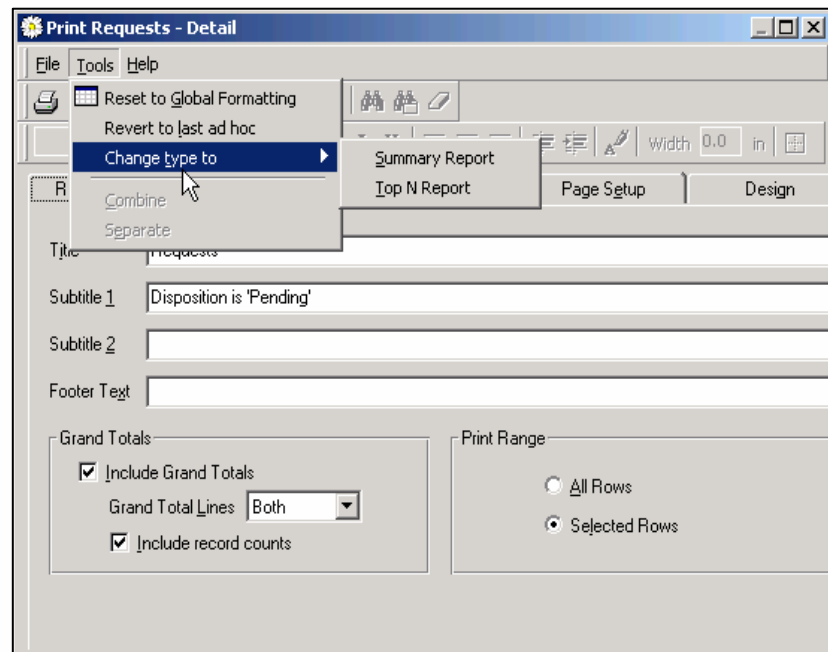
Example: “Instant” 6 Year Giving History

Organization Name	Granted 2000	Granted 2001	Granted 2002	Granted 2003	Granted 2004	Granted 2005
Adventure Club of Manhattan	\$200.00	\$10,000.00	\$10,000.00	\$10,000.00	\$5,000.00	\$10,000.00
American Foundation for Children	\$54,300.00	\$40,325.00	\$11,400.00	\$27,500.00	\$25,000.00	\$85,000.00
Big Brothers Big Sisters of New York City	\$0.00	\$20,000.00	\$5,000.00	\$15,000.00	\$55,000.00	\$50,000.00
Brooklyn Ballet	\$14,200.00	\$38,000.00	\$8,000.00	\$60,838.00	\$3,450.00	\$4,200.00
Computers for Kids	\$12,900.00	\$0.00	\$23,800.00	\$50,500.00	\$15,000.00	\$0.00
East Side Learning Center	\$0.00	\$2,500.00	\$0.00	\$0.00	\$0.00	\$0.00
East Side Learning Center	\$31,000.00	\$13,975.00	\$55,000.00	\$12,000.00	\$300.00	\$18,980.00

Ad-Hoc Report with “Total Granted” Column Added 6 Times, and Granted Date Search Criteria Added to Each Column

Types of Reports

- Detail
 - Each record displayed in its own row
 - Default report type
- 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



For more information, contact:

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