

Customized Documentation from Serensoft:

This is an example of the type of documentation Serensoft provides to its Higher Education Partners: it's fun to read, easy to understand, and imparts a clear understanding of the concepts at hand.

At Serensoft we believe strongly in contextual education, in three ways:

- by providing pertinent examples that have meaning to the class (we use your actual data from your department, in the examples);
- by determining an effective starting point based on the actual skill level and understanding of the students;
- by the sequence in which concepts are exposed during training.

We interview your staff in advance, before developing the curriculum, to determine their current skill levels; then we develop the concepts from there in an orderly fashion. (We also find ways to keep the advanced users intrigued, without losing the “newbies”.)

The data and examples you'll see in this sample text are manufactured; when we provide documentation for your training sessions, the examples will be actual snapshots of *your data*, from *your department*, at *your institution*.

The documentation here is based on feedback gathered during our on-campus interviews; this is the first of three layers of documentation for use in class during training, and later as a reference:

- ✓ **BEGINNINGS provides a gentle introduction to ReportNet**
A gentle introduction to working with ReportNet – create, sort, group and filter list reports
- ◆ **FOUNDATION is a reference for using ReportNet with your specific project**
Explore ReportNet's interface, learn troubleshooting tips, and more
- ◆ **HORIZONS points the way to advanced reporting concepts**
Fancy-pants stuff, including charts, Crosstabs, multi-layered queries, for starters

An Introduction To Cognos ReportNet

Cognos ReportNet is a powerful report-generation tool (and downright fun, at times); with your customized *Donor Reporting* project, it can generate handy overview summaries, detailed *List Reports*, quick *Crosstab Reports*, charts and more – with live data directly from your database system. And it all works in your web browser, so there’s nothing you need to install!

This document is a friendly tutorial showing how to interact with *ReportNet*, demonstrating concepts, features and techniques that you’ll use daily.

The examples come from *Donor Reporting*, as used in the Development office.

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Terminology

Let's start with some dull, mind-numbing, dull, boring, dull, dull nomenclature. Ready? There are three separate concepts related to working with ReportNet, and they are:

- **ReportNet itself**
- **Your reporting project (or projects)**
- **The report masters used to generate reports**

Got that? ☺

ReportNet is a program that works *alongside a web server* – it could be in the basement or in Boise or even downtown Brisbane for all we know – and it takes your requests, straight from your web browser, and it makes all kinds of fun magic happen. (Formally, it's a CGI program, and a really fancy one.) And it does so by hooking directly into your database, to pull live data into your reports. Cool!

Secondly, the *reporting projects* you use – such as Donor Reporting, which is where all our examples come from, here – specify a cross-section of your database that you have access to. You don't need access to the entire enterprise-wide data set, right? (For example, Student Services data isn't pertinent to Development, and vice-versa.) Also embedded inside a reporting project are specifications of how all the data is interrelated: for example, how does a person's profile record link up to their id record, or how does the gift designation table relate to the campaign table? Well, the reporting project takes care of that. Some industrial-strength computer gurus have to set it up for you, and they do that with the reporting project. The one we'll be discussing here is "*Donor Reporting*". Once all that is in place, you can start creating your own reports.

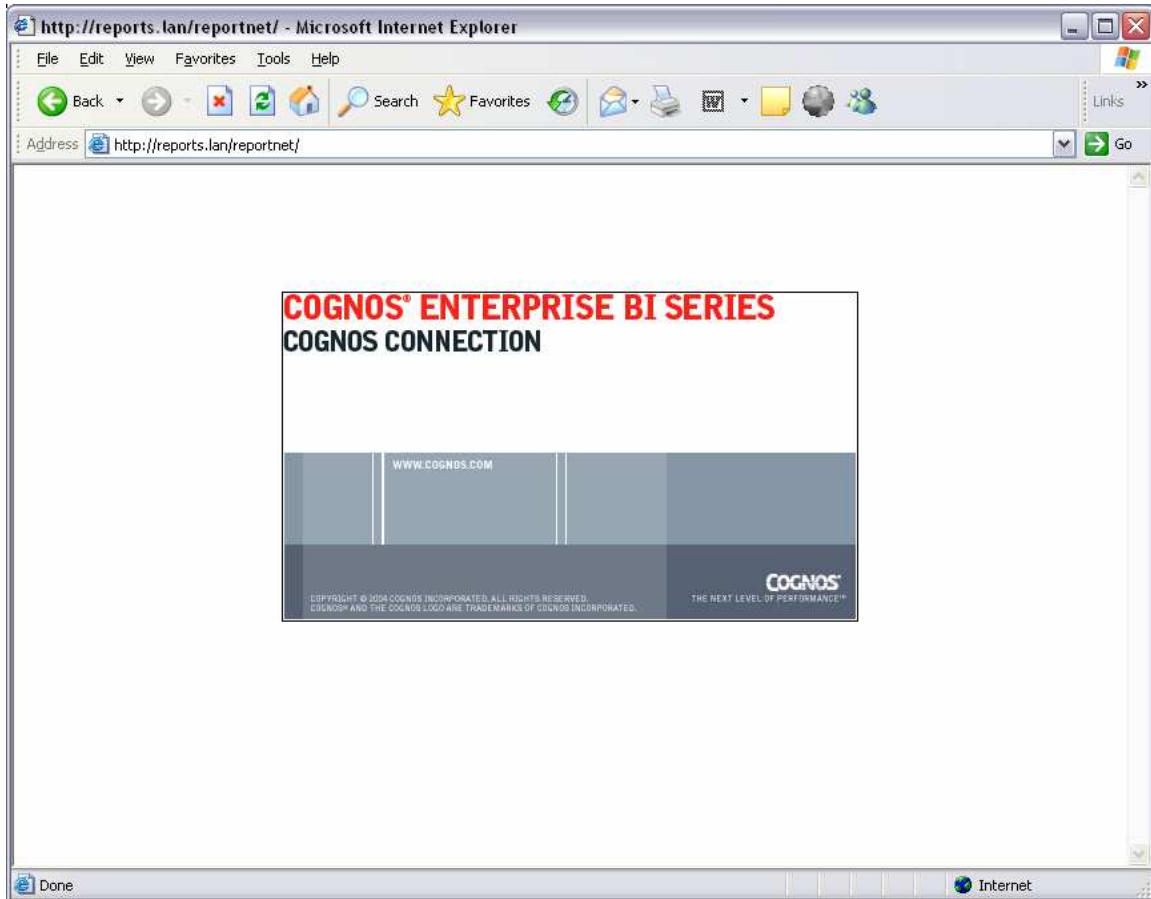
The third item we call *Report Masters*, and that's what you'll create. That's why you're here, after all. ☺ When you run a *Report Master*, it might be set up with several parameters, some of which are optional – then you'd specify which values to use in producing your final report, and you'll get results that you can bring up as a PDF, plop into Excel, print to a remote printer, or email to a colleague or two. We call them *Report Masters* because you can generate dozens or hundreds of individual results with one master, depending on which values you supply to the prompts. Gimme all Presbyterian alumni who graduated in the 1980's! Any denomination, who graduated between July 1992 and June 1995! Only Lutherans who graduated since 2001! One single *Report Master* could provide all these reports, and more.

A *Report Master* is tied to the specific *Reporting Project* that was used to create it; a *Report Master* also includes details on how to order the results, what formats to use in displaying it, how to break it up into sections and subtotals, and so forth.

Those are the three ingredients involved in your reporting solution. So let's dive in!

The ReportNet Interface

Okay, enough with the dry stuff. Let's get to the graphics – here's ReportNet: just fire up a web browser, point it to <http://reports.lan/reportnet/> and you're off!



When we first contact the website where ReportNet is, we see this splash screen. Woo-hoo, a commercial!

After a moment, you'll be asked to log in. Use your standard Windows-network login and password – that's how it's set up on campus. If you mess up, just try again – if it's not just “fat finger” syndrome, it might be that your CAPS LOCK key happens to be “on”, and that will screw things up if you have any lowercase letters in your password.

Log on

Please type your credentials for authentication.

Namespace:

Serensoft.Com

User ID:

Password:

Logging on to ReportNet

Nothing to it. And then, you're in!

John Q Sixpack Query Studio Report Studio

Cognos Connection Home Preferences Log On Log Off About Help

Welcome Public Folders My Folders New Page Tools

Welcome - Cognos Connection
Cognos Connection allows you to publish, find, manage, and view your organization's reports.

View Reports
Access pre-authored reports in the [Public Folders](#) tab.
Store and access your favorite reports in the [My Folders](#) tab.

Create Reports
Use [Query Studio](#) to create simple ad hoc queries.
Use [Report Studio](#) to create more advanced business reports.

Customize Cognos Connection
Click the New Page  button to create your own personalized pages.

Tools
The following tools are available:

Preferences	Personalize Cognos Connection. Specify display options, regional options, and personal information.
Schedule Management	View your report schedules and their run history.

Quick Tour

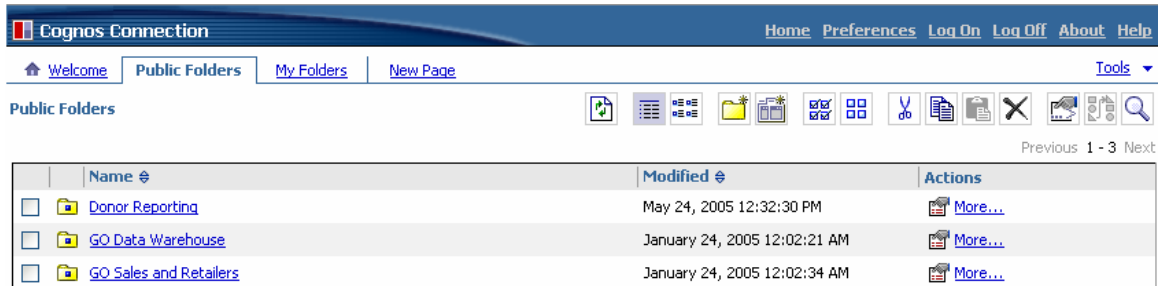
Making our customers the best decision-makers in the world!

All logged in and ready to rock

By the way – the Cognos folks (the people who created ReportNet) had the foresight to include a wealth of documentation along with their web-reporting-gizmo, and it's available from the "help" link, at top right. There's also a "Quick Tour" available, at bottom left. Noodle around and have a look. We'll still be here when you're ready to continue.

Getting back to our main welcome screen – call it a "Portal Page" if you want to sound all hoity-toity – this is your launch pad, where you can choose what you want to do first. You can fiddle with your "Preferences" (go ahead, we'll wait) or check out your private area ("My Folders") or delve into the "Tools" area or...

You'll spend most of your time in the "Public Folders" area. And we're heading there, now. You can either click the "tab" at the top of your browser window, or the link under "View Reports".



Now we're looking at "Public Folders" – you can tell by the "tab" that's selected at the top of the window. This is where the reporting projects reside, and we've got three of them at our disposal.





The "GO..." projects are the standard Cognos samples, and they concern the fictitious "Great Outdoors Manufacturing Company". There are some wonderful reporting examples in there to give you some ideas, and you can kick the tires, look under the hood, and even take them apart. The problem is, none of them pertain to Higher Education. Eek! Feel free to snoop around and have a look on your own, of course, but we won't spend any time on the manufacturing examples here.

Let's go into "Donor Reporting" instead. Just click on the name, and you're there!



Inside "Public Folders > Donor Reporting" we've already got five Report Masters to tinker with. Cool!

Let's look at the icons to the right of each *Report Master*, for a moment. Hover your mouse over any of them and a "tool tip" will appear, giving you more information as to what they do:

-  Set properties (such as renaming the *Report Master*, and lots more)
-  Run with options (as opposed to running with defaults pre-selected)
-  Modify the report to make it sing and dance (in this case, with Report Studio)
-  Create a report view (we talk about this later in Horizons)



Schedule (refresh your reports every third Thursday at 3am if you like)



View output versions (for when you save a particular Report, for later viewing)

As you'd expect, you can just click the name of the *Report Master* to run it with default settings – and the defaults usually specify that it will ask you to supply parameter values now, that it will run now, and that it will show up as a web page in your browser (now). Or, click the ▶ “Play” icon instead (similar to the triangle button on your CD player) to override any of these settings.

Running Reports

Let's run one of these to get a feel for how these reports work:

- **Click “gifts by designation & month”** (click the name, to run using default options)

Report Viewer - gifts by designation & month

Prompt

Provide values for the report you are about to run.

- * Indicates a required field.
- Points to missing information.

Desg

Provide a value:

AMST
BCBC
BCHS
BLKS
BPCD
BPRO
BSCH
CARS
CCBC
CCBF

[Select all](#) [Deselect all](#)

ask year

Provide a number:

*

OK










Cancel

*Our Report Master wants us to supply values to two parameters:
"DESG" code and "YEAR"*

Here we see two prompts – one for Designation code, and another for Year. Note that the “Year” prompt has the orange “star” indicating that it’s not optional; to proceed we *must* supply a value specifying a year. On the other hand, “Designation” is optional, because there it doesn’t have any such an orange star. So if we do specify a designation, we’ll restrict our results to just those that match – but if we don’t specify any, we’ll get all designations available!

- **Scroll down to specify “UNRS” designation, for unrestricted**
- **Enter “2003” for the year** (wow – really ancient historical data!)
- **Click “OK” to run your report**

Report Viewer - gifts by designation & month [Return](#) [About](#)

Gifts by Designation

Desg	Year	Month	Gift Amt
UNRS	2003	1	\$65,494.28
		2	\$24,675.31
		3	\$61,184.33
		4	\$32,359.34
		5	\$184,295.00
		6	\$158,960.24
		7	\$15,634.50
		8	\$31,696.34
		9	\$28,255.00
		10	\$74,906.01
		11	\$78,777.64
		12	\$435,634.86
	2003		\$1,191,872.85
UNRS			\$1,191,872.85
Summary			\$1,191,872.85

May 31, 2005

- 1 -

3:24:47 PM

Here’s a sample report, from our Report Master – we chose “UNRS” and “2003”.

Voila, instant results! This report organizes its results by designation, and then by year and by month. The presentation could be better, of course, and we’ll get to that later.

Notice we’ve got another toolbar, packed with icons:



Save this report as a report view



Email this report to a colleague



Re-run this Report Master, asking for the prompted values again

Following those, we have the “what format would you like?” tools:



Web page – currently gray (selected) so that’s the type we’re looking at right now



PDF – great for printing the entire report from start to finish



Excel 2000 – for easy spreadsheet analysis



Excel 2002 – munge the data however you like




CSV – comma-separated values, for use in spreadsheets or other databases



XML – for the tech-heads who need to get out more often

Allow Popups! Note that in order for the PDF or Excel links to work, you must enable pop-ups in your web browser. If you’ve got five or ten popup blockers installed in order to reduce the irritating ads that interfere with your web browsing experience, you’ll need to tell them all that it’s okay to allow popups from <http://reports.lan/> – otherwise PDF and Excel formats won’t ever appear on your desktop. Now you know.

Now we’re going to re-run this same Report Master with different parameters, to create a different final report:

- Click  to re-run the Report Master
- Specify no designation, this time (click “deselect all” to be sure)
- Specify the same year
- Click OK

Gifts by Designation

Desg	Year	Month	Gift Amt
BSCH	2003	2	\$250.00
		5	\$25.00
		8	\$75.00
		11	\$500.00
	2003		\$850.00
BSCH			\$850.00
CCBC	2003	1	\$30,302.00
		2	\$3,802.00
		3	\$477.00
		4	\$12,457.00
		5	\$83,482.00
		6	\$50,733.50
		7	\$5,457.00
		8	\$16,482.00
		9	\$67,332.00
		10	\$107,829.00
		11	\$512.00
		12	\$257,125.00
	2003		\$635,990.50
CCBC			\$635,990.50
CCBF	2003	2	\$1,100.00
		3	\$40,000.00
		4	\$2,700.00
	2003		\$43,800.00
CCBF			\$43,800.00


A different report, from the very same Report Master


Paging: note that the “web page” output format, which is the default, only shows about 20 rows of data at a time. To see more, you can click “page down” and “bottom” and so forth to navigate around. It’s more efficient to just pull the first few records from the database, until you’re sure you’ve got the data you want. When you want to print the entire result set, use the PDF format and it’ll run the entire report from Alpha to Omega, and sometimes that can take a while.

Same Report Master, different results! You should see now that one Report Master can generate lots and lots of end-use reports. So let’s get our feet wet!

- **Click the “Return” link (top right) to get back to your reporting project**

Before we launch into *Report Studio* – that’s where you can do some real heavy lifting, with fancy set-queries and formatting and industrial-strength filtering – we’ll traipse into *Query Studio*, first. With *Query Studio* we can get a feel for our database (and our reporting project) in a hurry. And sometimes a quick jaunt into *Query Studio* is all you need in order to answer the question at hand.

 [Query Studio](#) Quick answers to quick questions


 [Report Studio](#) Heavy-duty report writing

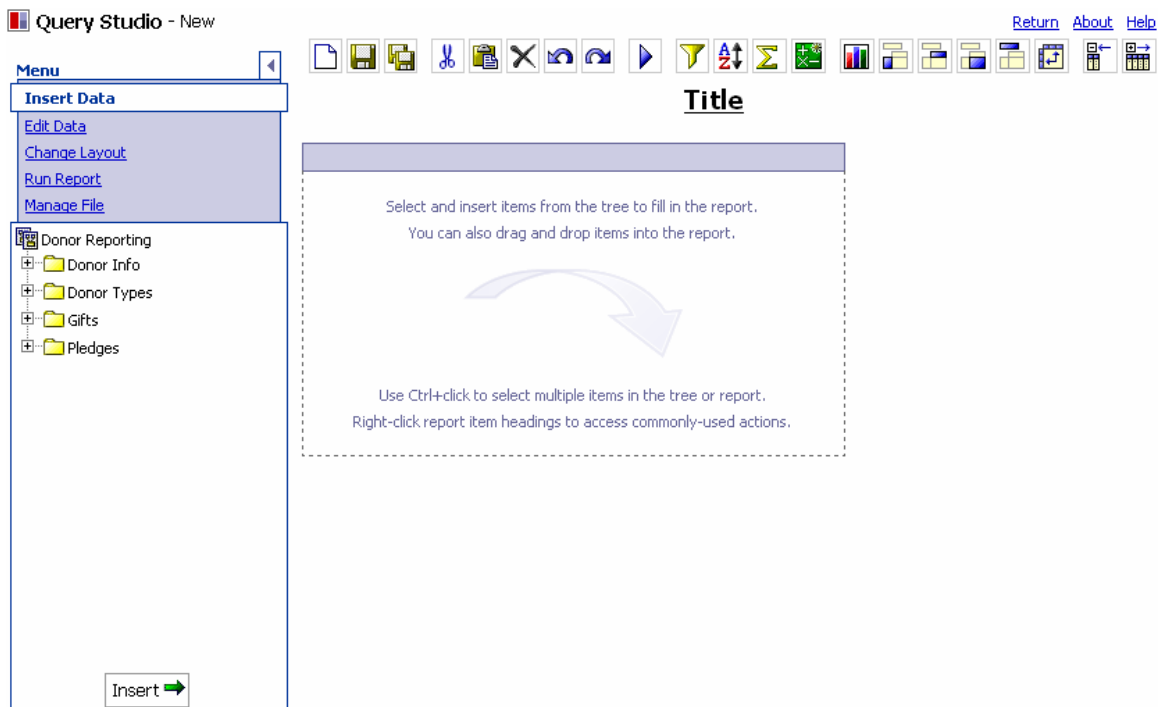
Browser Issues: *In order to access the fun and power of Report Studio, you must be running Internet Explorer, or something highly compatible with it. If you're using FireFox, you won't even see any links to get into Report Studio. C'est la guerre.*

These links are available at the top-right corner of your window, if you're a "Development Author" type of user. If you're a "Development Query" user, you'll see Query Studio only. And for the "Development Viewer" users, well – they won't have either studio available, but they'll be able to run reports right and left, specifying parameter values their hearts desire.

But us, well, we've got the keys to the fun box, so let's open it up...

Query Studio

- Click the  [Query Studio](#) link (at top right)



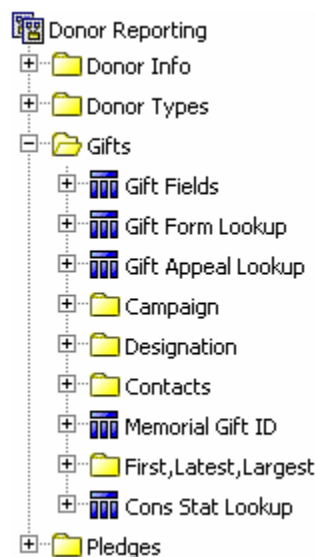
Query Studio: instant reports, just add water

To the left, there are five areas: by default we're already in "Insert Data". Later, we can use "Edit Data" or "Change Layout" to modify our reporting structure. But for now, we've got an empty report and we need to insert data in order to do anything useful.

Under where it says “Donor Reporting” you see four folders. Finally, there’s your reporting model!

- ⊕ Open an item by clicking its “+”
- ⊖ Close an item by clicking its “-”

Cautious Double-Click: *If you double-click something from your model, you’re telling Query Studio to insert it into your report – and if you do that to a folder with dozens of records containing hundreds of fields... well, just say no. Unless you really mean it (and have plenty of free time).*



After opening “Gifts” we can delve further (click on any “+” to open an item) or fold it back up (click on any “-” to close the item)

Anything and everything that’s in the model, you can use in your reporting adventures.

Before we go any further, take a look at these toolbar items – particularly “Undo”:



New – creates a new Report Master



Save – saves any changes you’ve made



Save As – saves your Report Master under a new name



Cut – select a column or two, then cut (to paste them elsewhere, if you like)



Paste – select a target and paste your stuff there



Delete – select something and send it to the “bit bucket”



Undo – the life saver!





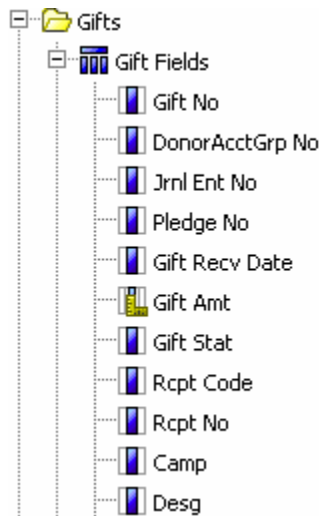
Redo – for when you change your mind about “Undo”

The rest comprise most of the fun you can have in Query Studio, and we’ll talk about some of them shortly. (Others you’ll have to discover on your own. Think of it as “continuing education”...)

Adding Columns to your Report

So let’s do some gift reporting, shall we?

- **Open** (Click its ) **Gifts**
- **Open** (Click its ) **Gift Fields**



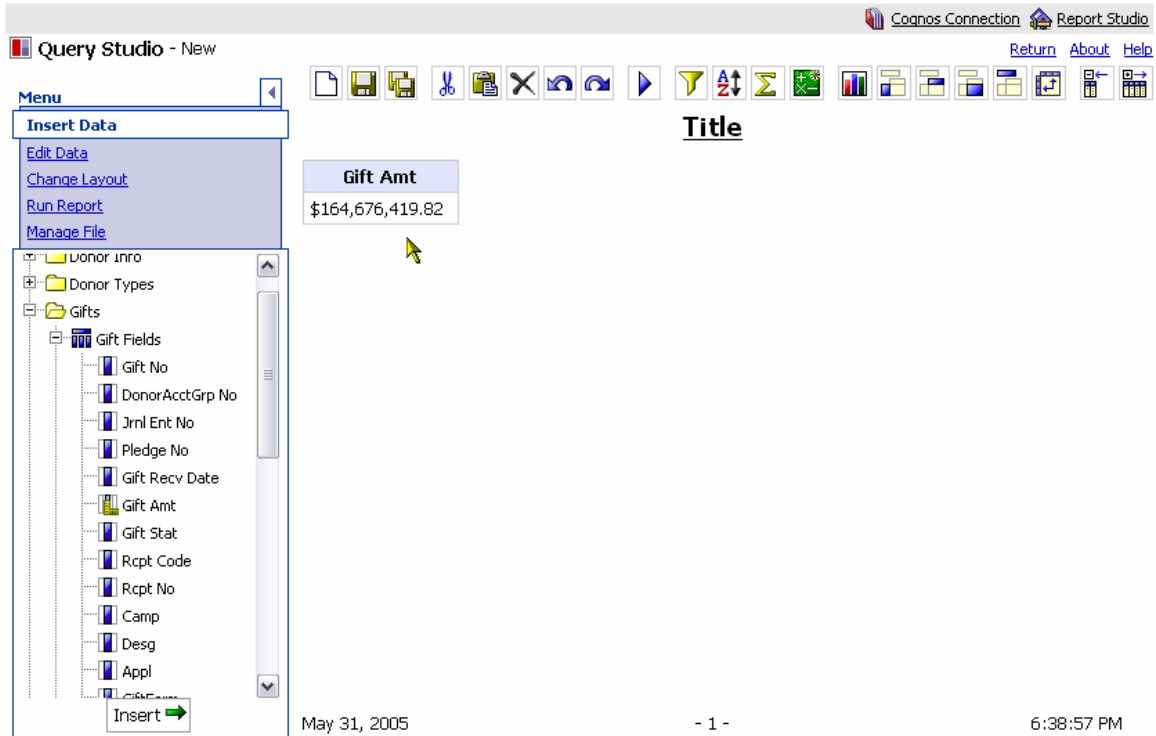
With “Gift Fields” open we can see the “Gift Amt” field

Why does Gift Amt have a different icon? That’s because it’s an *amount* that can be summarized. GPA could be averaged, amounts will be totaled, and so forth – they are what the database enthusiasts call “measures”. An ID number (or gift number, as well) isn’t something we want to average or to total, right? So an ID, even though it’s numeric, winds up being just a plain old identifier. Gift amount, on the other hand, we want to be able to summarize!

And guess what? ReportNet (as directed by the Donor Reporting project) will summarize for us automatically! Let’s see it in action—

- Select "Gift Amt"
- Click  to "make it so"

Poof, instant report!



*We inserted the "Gift Amt" field, and the report runs itself!
We show \$164 million, which is a total of all the Gift Amt values in the entire database.*

Deleting Columns from your Report

Now we'll add a field just to mess things up, to show how easy it is to recover:

- Select "Donor AcctGrp No"
- Click 

Gift Amt	DonorAcctGrp No
\$3,750,107.80	0
\$50,679.00	2
\$79,299.94	3
\$14,780.00	4
\$52,598.00	5
\$821.00	6
\$2,090.54	7
\$6,130.00	8

Well, we've got something, but we don't really want it

Um, what is that? Looks like "Zero" is awfully big. This isn't meaningful stuff, so let's get rid of that column.

- **Select your "Donor AcctGrp No" column** (click the column header)

Gift Amt	DonorAcctGrp No
\$3,750,107.80	0
\$50,679.00	2
\$79,299.94	3
\$14,780.00	4

The column is selected, and ready to be cut, or deleted, or formatted, or filtered, or grouped...

Let's delete it.

- Click  or, press the "Delete" key on your keyboard if you're that type

Gift Amt
\$164,676,419.82

Ah. Right back where we started, all clean and fresh! So, it's easy to delete a column if you have one you don't want. Zap!

Now... let's add another field to our report to see this automatic summarization in more detail:

- **Select "Gift Stat"**

- Click 

Aha! Very important distinction, here:

Gift Amt	Gift Stat
\$0.00	
\$143,245,944.11	P
\$21,430,475.71	V
\$164,676,419.82	

*Over \$21 million were voided! So the real amount is \$143 million.
(There are also some blank statuses, but they're all zeroes, apparently.)*

Notice that we get a summary of Gift Amount per each distinct Gift Status? Boy is that handy!

Controlling the Rows in your Report (Filtering)

So let's just exclude voided gifts from our report – if it's not posted, we don't want to see it. We do this by selecting the column that contains the data we want to test (or “filter”), and that's Gift Stat because that's where the “P” is:

- **Click the “Gift Stat” column header**

Gift Amt	Gift Stat
\$0.00	
\$143,245,944.11	P
\$21,430,475.71	V
\$164,676,419.82	

The column is highlighted when you click the header

Now we add a filter:

- **Click the filter  button in the toolbar at the top**

Filter (Type in values) ✕

Reduce the amount of data in the report. With the Prompt option selected, the filter [Pick values from a list](#) [Search for values](#) can be changed each time the report runs.

Filter on: Prompt every time the report runs
Gift Stat

Show only the following:

Choices:

[Select all](#) [Deselect all](#)

Show missing values

There are three ways to specify which values you want – “Pick values from a list”, “Search for values” and “Type in values” (available at top right, within the Filter dialog area). We’re using the third option.

- Enter “P” and click 

Choices:



These are the values we want to see – just Posted gifts only, please

- Click 

 [Gift Stat: P](#)

Gift Amt	Gift Stat
\$143,245,944.11	P
\$143,245,944.11	

Our filtered report, showing only Posted gifts

Just what the doctor ordered. We can even see the filter specification at the top of our report, and we can click the link there if we want to change it.

Let’s further filter our results by Gift Recv Date. Can you figure out how to do that without peeking ahead?

- **Insert “Gift Recv Date” into your report**
- **Select the new column** (click the column header)
- **Click the filter button** (yellow funnel)
- **Specify a begin date** (we used 1-Jul-2002)
- **Specify an end date** (we picked 30-Jun-2004)

Hmm!

- Gift Stat: P
- Gift Recv Date: between 2002-07-01 and 2004-06-30

Gift Amt	Gift Stat	Gift Recv Date
\$570.00	P	3-Jul-2002
\$14,448.33	P	8-Jul-2002
\$910.00	P	9-Jul-2002
\$6,050.00	P	10-Jul-2002
\$5,445.83	P	11-Jul-2002

We're only seeing the time range we asked for, but we're getting summaries per date!

Well that's interesting. The date range is right, but now we have daily totals, which we don't really want. We're just looking for overall totals, but date-restricted.

As it turns out, once you have a filter set up, *Query Studio* will let you remove the column, and the filter can keep doing its thing.

- Select the "Gift Recv Date" column
- Click  or press the "Delete" key on your keyboard

Query Studio will ask if you want to remove the filter based on the column you're deleting; if you click NO then you'll keep the filter, but the column will go away.

Delete Filter

There are filters on one or more of the selected items.
Do you want to delete the filter or filters?

Yes No Cancel

There's a filter on the column we're deleting; we can click YES to delete the filter with the column; NO to keep the filter (but still delete the column); or CANCEL to abort the whole delete process completely

- Click NO (lose the column, keep the filter)

And now our grand total has changed, because we're only summarizing part of our data – just the posted gifts that arrived between the two dates we asked for!

- Gift Stat: P
- Gift Recv Date: between 2002-07-01 and 2004-06-30

Gift Amt	Gift Stat
\$11,167,964.75	P
\$11,167,964.75	

And now we have a grand total that applies to the date range we specified

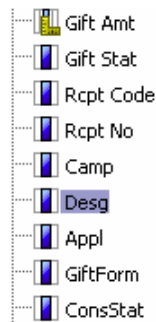
As it turns out, we don't need the "Gift Stat" column any more, either. Feel free to ditch it (but *keep the filter*). You're on your own – it's good practice!

When your own reports have fifteen or twenty-three columns, you can pick any of them and create filters left and right. The more filters you have, the less data you'll see (the more data you're weeding out); that is, your filters specify what data shows up in the rows of your report. If you're not seeing enough data, you've probably got a filter or two too many, or they're too stringent. If you're seeing more data than you want, you probably just need to add another filter or two, or the ones you've already got are a bit too permissive. Tweak it until it's right!

Sorting and Grouping

We've already seen a bit of how summarization works – let's explore a bit further to get the rest of the picture. Now we'll add "Designation" to our report.

- **Select "Desg" from the field collection inside "Gift Fields"**



Select "Desg" code from "Gift Fields"

- **Click**

Gift Stat: P

Gift Recv Date: between 2002-07-01 and 2004-06-30

Gift Amt	Desg
\$2,800.00	BCHS
\$3,690.00	BSCH
\$1,627,465.88	CCBC
\$134,100.00	CCBF
\$112,955.62	CCCC
\$2,221.78	CCCS
\$24,600.00	CCFC

Now our gift amounts are summarized per designation!

All we did was add a new field, and our summaries were recalibrated automatically! Now we see a total of all gifts for each designation. And our filter is still active, so we're not seeing any voided gifts. Cool, eh?

The way these “measures” work is, you see a summary for each distinct combination of values; so, for each Designation/Gift Stat combination, we get a Gift Amt total.

Let's add another field, just to be sure:

- **Include “Gift Form” in your report as well**


Gift Amt	Desg	GiftForm
\$2,800.00	BCHS	CASH
\$3,240.00	BSCH	CASH
\$200.00	BSCH	CRCD
\$250.00	BSCH	SPCR
\$1,271,608.32	CCBC	CASH
\$3,400.00	CCBC	CCCR
\$10,700.00	CCBC	COCR
\$5,920.00	CCBC	CRCD
\$16,500.00	CCBC	EFT
\$20,000.00	CCBC	FOCR
\$4,300.00	CCBC	MGCR
\$6,200.00	CCBC	OTHER

Now we see summary totals per designation/form combination.

So, within the time period we requested, all the posted CASH gifts to BCHS amount to \$2,800. All the CCBC gifts designated for CRCD total \$5,920. For each unique combination of values, we get a summary total. Neat!

Notice that we've got similar Designation records clustered together, and within Designation, we've got various different Gift Form codes. This isn't because of anything bright we did, it just “came from the database” that way. What if we want to cluster the Gift Forms together first, and then subdivide those “gift form buckets” by Designation, hmm?

Easy.

- **Select the “Gift Form” column** (by clicking the column header)
- **Click the  sort button in the toolbar**

Gift Amt	Desg	▲GiftForm
\$5,000.00	RTIS	CASH
\$8,000.00	ESVP	CASH
\$12,000.00	SCOR	CASH
\$5,000.00	RCES	CASH
\$5,000.00	EWNK	CASH
\$2,800.00	BCHS	CASH
\$11,500.00	CCFV	CASH
\$7,000.00	EJGS	CASH
\$14,250.00	CCCC	CASH

Now we're sorting by "Gift Form" (ascending from A to Z, as indicated by the triangle icon, pointing UP)

Now all the BUCR Gift Forms are clustered together, followed by the CASH Gift Forms, and so on. Since there was no other explicit sort order, this one 'sort' sets the sequence for the whole report.

Okay. Yes, it's nice to be able to control the ordering, sure – but still, it takes a bit of time to see where one group of records stops, and the next one starts...

This is why Cognos provided "Grouping". It's a much nicer way to present sorted data; plus, with groups, you get subtotals! Let's have a look:

- **Select the "Desg" column**



▼ Gift Stat: P

▼ Gift Recv Date: between 2003-07-01 and 2004-06-30

Gift Amt	Desg	▲GiftForm
\$5,000.00	RTIS	CASH
\$8,000.00	ESVP	CASH
\$12,000.00	SCOR	CASH

With a column selected, click the "Group" button in the toolbar to organize your report by that field

- **Click the "Grouping" button**

Desg	Gift Amt	▲GiftForm
BCHS	\$2,800.00	CASH
BCHS	\$2,800.00	
BSCH	\$645.00	CASH
	\$200.00	CRCD
	\$200.00	SPCR
BSCH	\$1,045.00	
CCBC	\$395,100.00	CASH
	\$3,400.00	CCCR
	\$3,000.00	COCR
	\$80.00	CRCD
	\$1,100.00	EET

With all the white space under each Gift Form code, we can easily see where each group starts and stops – plus, we get subtotals per group!

Now it's easy to see at-a-glance that there are three Gift Form records for the BSCH Designation, but only one for BCSH! Very handy, wouldn't you say? And we know more than just the designation details – we also have a subtotal for each Designation group. Nice!

So, while sorting can help you determine the sequence your rows appear in, grouping does that and more – with grouping it's much easier to see where each group starts and stops. Plus, with groups, you can have subtotals!

Let's add another field, and group on it as well.

- **Insert "Cons Stat" (Constituent Status) into your report**
- **Select the new column and group it**

Desg	ConsStat	Gift Amt	△GiftForm	
BCHS	CHURCH	\$2,800.00	CASH	
	CHURCH	\$2,800.00		
BCHS		\$2,800.00		
BSCH	ALUMNI	\$30.00	CASH	
	ALUMNI	\$30.00		
	ASSOCIAT		\$75.00	CASH
			\$200.00	CRCD
			\$200.00	SPCR
	ASSOCIAT	\$475.00		
	CHURCH	\$540.00	CASH	
	CHURCH	\$540.00		
BSCH		\$1,045.00		
CCBC		\$945.00	CASH	
		\$945.00		

After inserting “Camp” (Campaign) and then grouping on it – now we have two layers of subtotals

We found this chunk of data a few pages down in our report: we can see at a glance that BCHS only has one Constituent Status (CHURCH) and one Gift Form (CASH); on the other hand, BSCH has three ConsStat codes, and its ASSOCIAT ConsStat code has three Gift Forms of its own. Here the two layers of grouping are doing their thing – the white space helps visually separate blocks of data, and the subtotals give a “big picture” view of what’s going on.

To Repeat: *when there’s lots of data to see, ReportNet will break your web-page reports into about twenty rows at a time, to give you a taste for the data that’s on your report. Once you’re convinced that you’ve got it right, you can ask for the whole report at once: Either click on one of the Excel buttons, or use PDF if you’re going to print it. (Sometimes a large report can take a long time to assemble, and the database connection can return the first few rows or so just to give you an idea of what’s coming. If you don’t need the whole report, but you ask for it anyway – by requesting PDF or Excel formats – then you may wind up waiting a long time, for nothing!)*

Quick Crosstab

A Crosstab is a two-dimensional report. Until now, we’ve been looking entirely at List Reports, which are one-dimensional (top-to-bottom). We’ve selected which columns to display, and the database fleshes out the rows.

Crosstabs aren’t like that. For the simplest Crosstab, we need at least three fields: two different fields that we want to correlate, and a measure. For example—

Let's start fresh with a new report: it should contain only Designation, Gift Form and Gift Amt. Be sure to filter out voided gifts, though. We don't need no stinkin' voided gifts cluttering up our results (plus, it's good exercise).

 [Gift Stat: P](#)

ConsStat	GiftForm	Gift Amt
	BUCR	\$66,956.00
	CASH	\$68,297,569.38
	CCCR	\$30,100.00
	CHCR	\$20,933.41
	COCR	\$2,203,786.12
	CRCD	\$9,740.00
	DTCR	\$180.00
	EFT	\$3,780.00
	TOTL	\$143,033.00

Here we are: two identifiers, and a measure (and a filter, just for spite)

The two code fields will be our Crosstab axes, and the amount field (that's our "measure") will flesh out the interior of our Crosstab. Ready?

- **Select the "ConsStat" column**

- **Click the  "Pivot" button**

Gift Amt		ADVBD	ALUMNI	ASSOCIAT	BUS/CORP	CHURCH	EST
BUCR	\$66,956.00						
CASH	\$68,297,569.38	\$112,137.43	\$917,472.14	\$3,636,753.70	\$1,436,192.71	\$1,268,207.26	\$2,062
CCCR	\$30,100.00				\$3,400.00		
CHCR	\$20,933.41		\$5,695.00	\$1,485.00		\$3,200.00	
COCR	\$2,203,786.12	\$3,500.00	\$694.84	\$9,655.00	\$13,000.00		
CRCD	\$9,740.00	\$2,900.00	\$42,835.49	\$47,280.00			
DTCR	\$180.00						
EFT	\$3,780.00		\$16,160.00	\$32,435.00		\$200.00	
TOTL	\$143,033.00			\$4,105.00			

Voila, a Crosstab! Now we can get a picture of how gift form (across the top) relates to designation (down the left)

No surprise, CASH seems to be everyone's favorite gift form. And Associates are pretty busy helping out – more than twice as helpful as the businesses are, according to this data.

Whether you scan down or across depends on the type of data you're looking for. Here you get your choice of data-by-Gift-Form or data-by-Constituent-Status.

With a conventional (one-dimensional) list report, we would have an outline that's broken down by one field first, and then we could break it those clusters by another field (ConsStat then Gift Form, or vice-versa). With a Crosstab you have both at once!

Sample Documentation

If this were your actual documentation, for your staff in your department on your campus, the examples would all be from your data... and the text would continue from here to discuss saving reports, and then we'd delve into the joys of Report Studio.

SAMPLE

But That's Just The Beginning...

“Beginnings” is only the first of three layers of documentation that Serensoft would provide to your campus for training. The second – “Foundation” – deals more in depth as to what the particular reporting projects can do, and the third – “Horizons” – explores more advanced concepts. Three layers of information, exposing context gradually, as appropriate for each user.

Remember, the documentation we create for your departments will have examples and data from your institution, from the appropriate departments. It'll start out meaningful to your team, and it'll be easier for them to understand the information and easier remember it... and easier for them to use it, when the time comes.