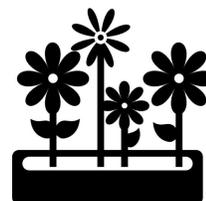


# GiftGarden Reports V1.0

*Prof Bill - Oct 2016*

*Tue Oct 25... V1.0 for Sprint #2*



A review of reports we will offer in GiftGarden™.

## Report Options

Most reports will have common options including:

- **Timeframe** over which the data is examined. The choices here are:
  - “this” - this year (YTD), this quarter, this month
  - “last” - last year, last quarter, last month
  - “numbers” - 2 years, 5 years, 2 quarters, 3 months, 6 months
  - “all” - report all data
- **Top N** limit on report length. Choices are: 10, 20, 50, 100, all
- **Sort** the report by a field, for example: name, amount or category

Issue: Add notes to report?

Issue: Allow specific date-to-date timeframes?

Issue: Toggle for long vs. short report versions? Long reports are landscape/wide. Short reports are portrait (tall) and 1 row per report item.

## Basic Reports

There are 3 basic reports for each Garden object: Activity, Donor, Gift.

Here are some examples that combine basic reports with the reporting options.

- Top 10 Donors year-to-date
- All Gifts last quarter, sorted by amount
- All Gifts last quarter, sorted by Activity

## Exotic Reports

These are some possible reports that expand beyond the basic Garden objects.

### “Blue” Report

A list of Gift, sorted by label: personal, corporate, grant, 3rd party, etc.

Example: Report all personal gifts YTD, sorted by amount.

Issue: Is “personal” and “corporate” a label?

## In Kind Report

A report of “in kind” Gifts, that are items rather than \$\$\$.

Example: Report all “in kind” gifts this quarter sorted by date.

Issue: Hey, is “In Kind” an Activity?!?

## LYBUNT Report

Report all donors who have previously donated, but haven’t this year.

One toggle option: Donors from last year or Donors from any time in the past.

Example: Report all Donors missing this year, sorted by last name.

## New Donors Report

Report new donors and their Gifts over a timeframe.

Example: Report all new donors this year. Report all new donors from 2014.

## One Donor Report

Report everything we know about one Donor: contact info, gifts, related donors, etc.

## Recurring Activities Report

Report year-to-year changes in a recurring Activity: goal, goal completed percentage, \$\$\$ amount, number of donors, etc.

## Label Reports

Report all Gifts that match a certain label like...

Issue: The whole label thing needs more attention.

That’s it for now.

thanks... yow, bill

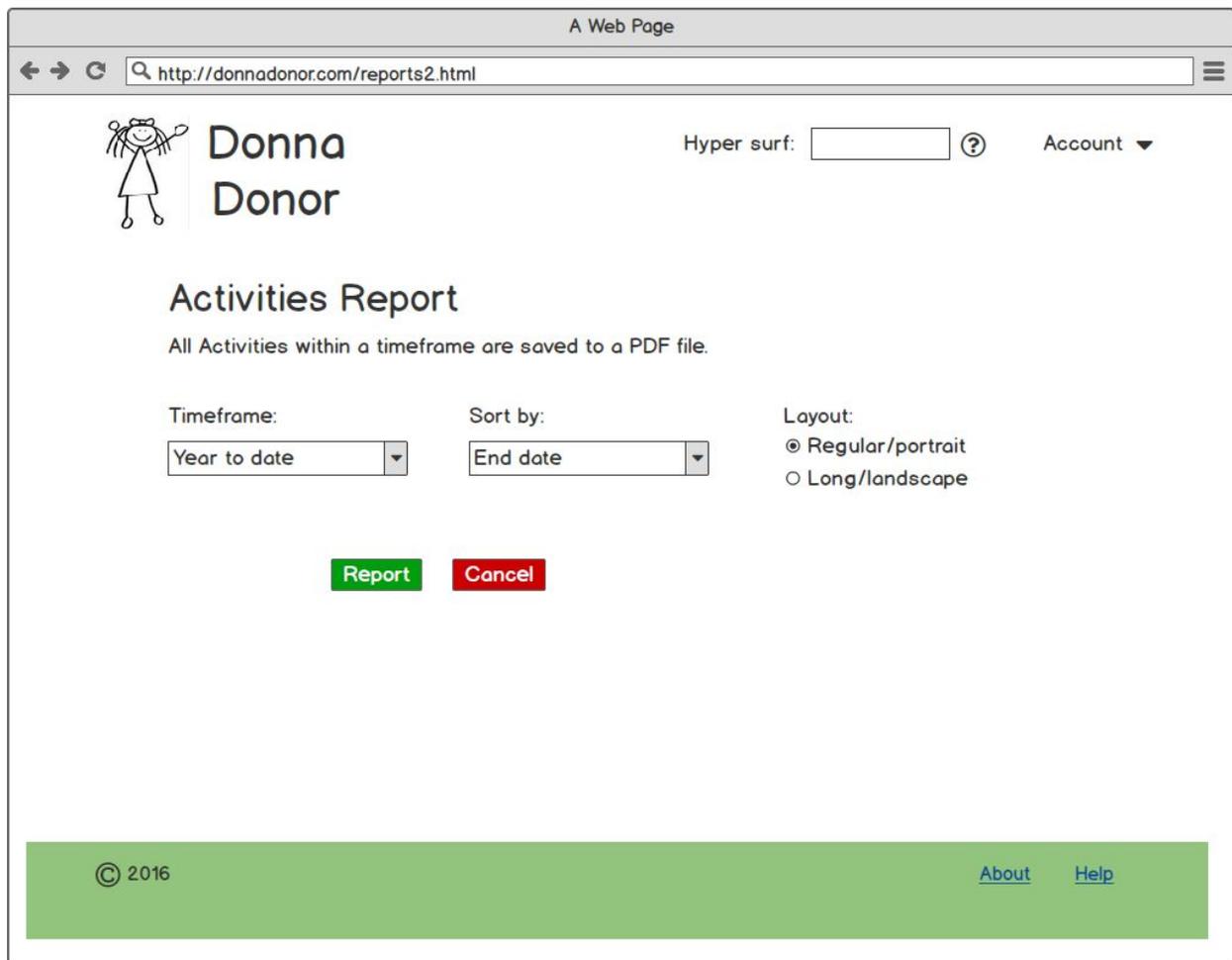
## Appendix A. Basic report screens

We have 3 basic reports, one per table: Activities, Donors, and Gift.

Recall that the Reports.1 screen is the guy who shows all possible reports. These screens are shown as a result of picking from Reports.1

Please ignore all the Donna Donor artifacts. No time/reason to clean this up on internal wireframes.

### Reports.2 Activities Report



The screenshot shows a web browser window titled "A Web Page" with the address bar containing "http://donnadonor.com/reports2.html". The page features the Donna Donor logo (a stick figure) and the text "Donna Donor". In the top right corner, there is a "Hyper surf:" input field, a help icon (?), and an "Account" dropdown menu. The main heading is "Activities Report", followed by the text "All Activities within a timeframe are saved to a PDF file." Below this, there are three sections: "Timeframe:" with a dropdown menu set to "Year to date"; "Sort by:" with a dropdown menu set to "End date"; and "Layout:" with two radio button options: "Regular/portrait" (which is selected) and "Long/landscape". At the bottom of the form area, there are two buttons: a green "Report" button and a red "Cancel" button. The footer of the page is a green bar containing "© 2016" on the left and "About" and "Help" links on the right.

# Reports.3 Donors Report

A Web Page

← → ↻

 **Donna Donor**

Hyper surf:  ? Account ▾

## Donors Report

All Donors within a timeframe are saved to a PDF file.

Timeframe:  ▾

Top N:  ▾

Sort by:  ▾

Layout:  
 Regular/portrait  
 Long/landscape

© 2016 [About](#) [Help](#)

# Reports.4 Gifts Report

A Web Page

← → ↻

 **Donna Donor**

Hyper surf:  ? Account ▾

## Gifts Report

All Gifts for an Activity within a timeframe are saved to a PDF file.

Activity

Timeframe  Top N:  Sort by:

© 2016 [About](#) [Help](#)

## Appendix B. Basic Report Examples

Some examples of the 3 basic reports.

These are PDF's. Here we go:

- Activities Report, portrait layout: [Activities1 \(pdf\)](#)
- Activities Report, landscape layout, [Activities2 \(pdf\)](#)
- Donors Report, portrait layout, [Donors1 \(pdf\)](#)
- Donors Report landscape layout, [Donors2 \(pdf\)](#)
- Gifts Report, [Gifts1 \(pdf\)](#)

Note: I didn't see a reason for a long/landscape Gift report.

Note: Carrie P really like the common report intro: BIG header, created on <date> by <user>, and report options used.

thanks... yow, bill