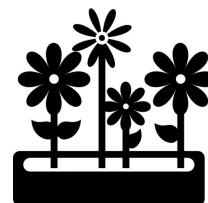


# Gift Garden Reports V1.1

*Prof Bill - Oct 2016*

*Thu Nov 10, 2016... V1.1 for Sprint #3*

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



This is a review of reports we will offer in Gift Garden™.

There are three sections: A. Report Options; B. Basic Reports; C. Exotic Reports.

[Some V1.1 comments are in blue. I reorganized this a bit.](#)

## A. 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.

## B. 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


Screens for each report follow. 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 need to clean this up on internal stuff.

## Reports.2 Activities Report

A Web Page

← → ↻

**Gift Garden**  Hyper surf:  ? Account ▼

### Activities Report

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

Timeframe:  Sort by:

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See **basic\_activities.pdf** example in shared Report folder:

[drive.google.com/drive/folders/0B9S7SNFbzdsRYIRhQm1OSDhwdDQ?usp=sharing](https://drive.google.com/drive/folders/0B9S7SNFbzdsRYIRhQm1OSDhwdDQ?usp=sharing)

## Reports.3 Donors Report

A Web Page

← → ↻

**Gift Garden** 

Hyper surf:  ? Account ▼

### Donors Report

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

Timeframe:  ▼

Sort by:  ▼  Full contact

Top N:  ▼

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See **basic\_donors.pdf** and **basic\_donors\_full\_contact.pdf** example in shared Report folder:

[drive.google.com/drive/folders/0B9S7SNFbzdsRYIRhQm1OSDhwdDQ?usp=sharing](https://drive.google.com/drive/folders/0B9S7SNFbzdsRYIRhQm1OSDhwdDQ?usp=sharing)

## Reports.4 Gifts Report

A Web Page

← → ↻

**Gift Garden**  Hyper surf:  ? Account ▼

### Gifts Report

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

Activity

Timeframe

Sort by:

Top N:

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See **basic\_gifts.pdf** example in shared Report folder:

[drive.google.com/drive/folders/0B9S7SNFbzdsRYIRhQm1OSDhwdDQ?usp=sharing](https://drive.google.com/drive/folders/0B9S7SNFbzdsRYIRhQm1OSDhwdDQ?usp=sharing)

## C. Exotic Reports

These are the more exotic reports available in Gift Garden.

### 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.

### 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?!?

### "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?

Not coming soon... later reports because they require UX and data model work:

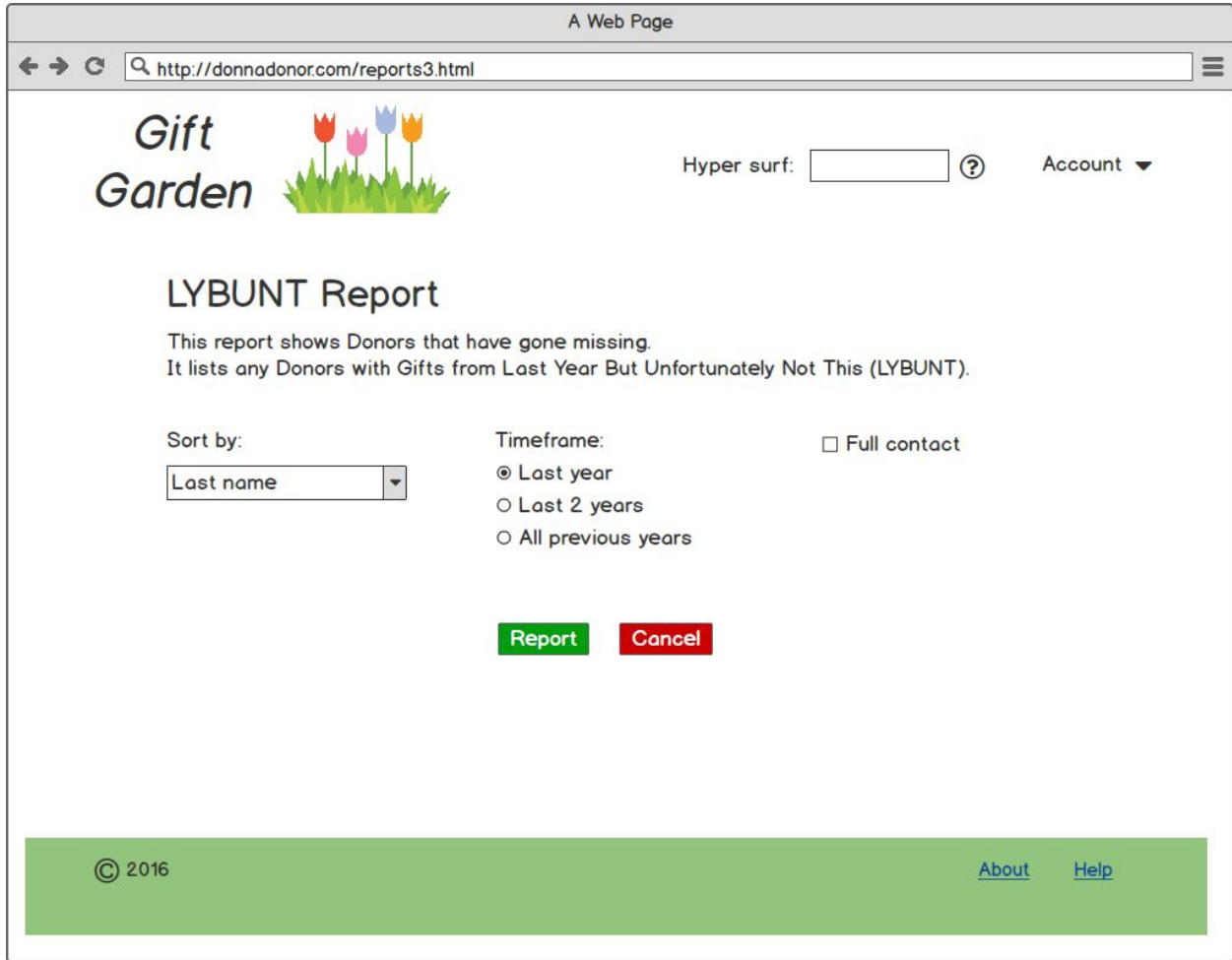
- Recurring Activities Report - Report year-to-year changes in a recurring Activity: goal, goal completed percentage, \$\$\$ amount, number of donors, etc.
- Related Donors Report - List and subtotal Gifts by Donor Groups

Issue: [Should we number each of these reports? "I printed report number 5, the New Donors Report."](#)

The Gift Garden screens for each report follows.

## Exotic.1 LYBUNT Report

This report lists Donors with gifts “Last Year But Not This” (LYBUNT)



The screenshot shows a web browser window titled "A Web Page" with the address bar containing "http://donnadonor.com/reports3.html". The page header features the "Gift Garden" logo with a tulip illustration, a "Hyper surf:" search box, and an "Account" dropdown menu. The main heading is "LYBUNT Report", followed by a description: "This report shows Donors that have gone missing. It lists any Donors with Gifts from Last Year But Unfortunately Not This (LYBUNT)." Below this are filters for "Sort by:" (set to "Last name"), "Timeframe:" (with radio buttons for "Last year", "Last 2 years", and "All previous years"), and a checkbox for "Full contact". At the bottom of the filter section are "Report" and "Cancel" buttons. A green footer bar contains "© 2016" and links for "About" and "Help".

See **exotic\_lybunt.pdf** and **exotic\_lybunt\_full\_contact.pdf** example in shared Report folder:

[drive.google.com/drive/folders/0B9S7SNFbzdsRYIRhQm1OSDhwdDQ?usp=sharing](https://drive.google.com/drive/folders/0B9S7SNFbzdsRYIRhQm1OSDhwdDQ?usp=sharing)


The format of this report is the same as Basic Donors.

## Exotic.2 New Donors Report

This report lists new Donors over a timeframe. A Donor is considered “new” as of the date of his/her first Gift.

A Web Page

← → ↻ http://donnadonor.com/reports3.html

**Gift Garden**  Hyper surf:  ? Account ▼

### New Donors Report

This report lists new Donors.  
A Donor is considered “new” as of the date of his/her first Gift.

Timeframe:  Sort by:   Full contact

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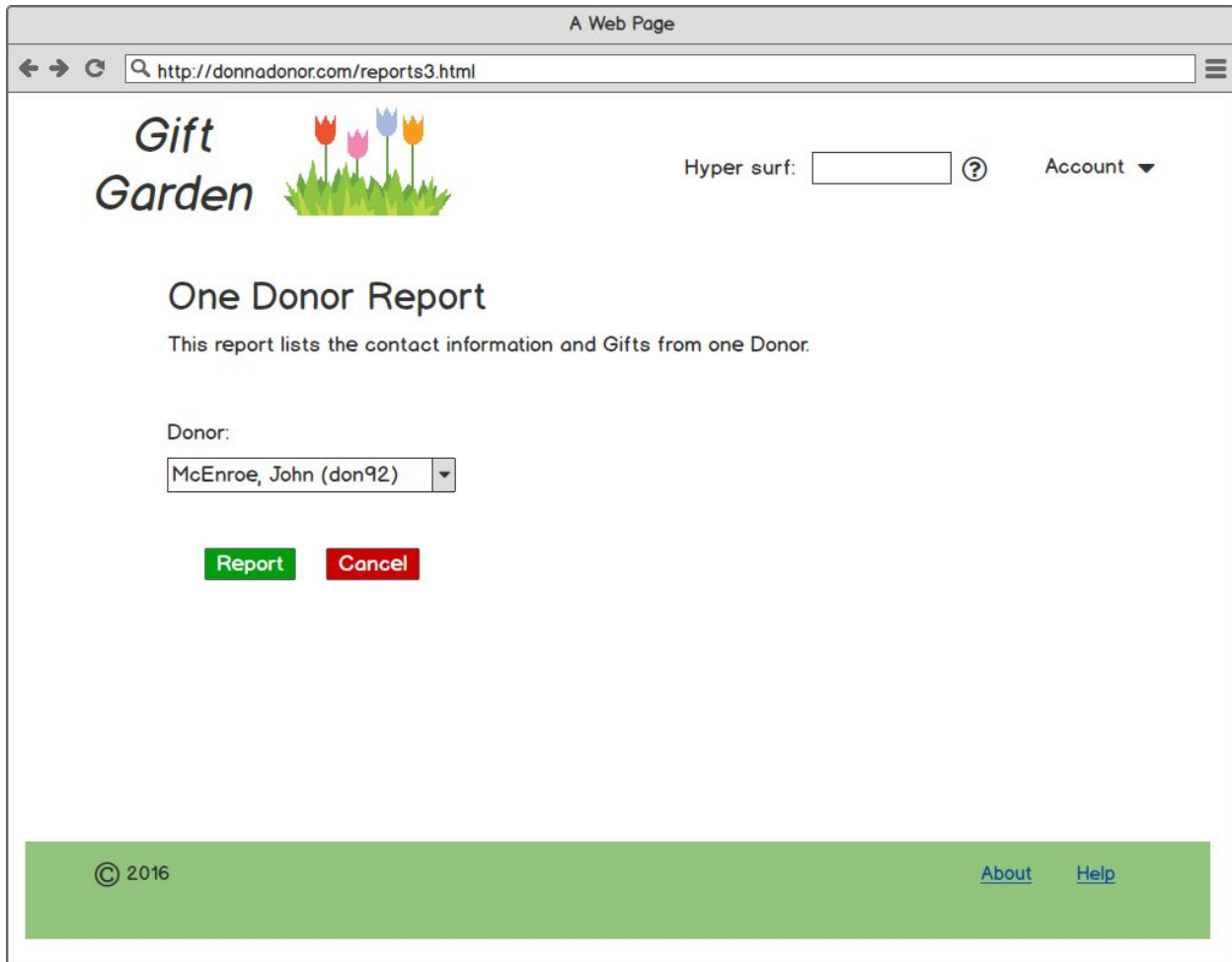
See **exotic\_new\_donors.pdf** and **exotic\_new\_donors\_full\_contact.pdf** example in shared Report folder:

[drive.google.com/drive/folders/0B9S7SNFbzdsRYIRhQm1OSDhwdDQ?usp=sharing](https://drive.google.com/drive/folders/0B9S7SNFbzdsRYIRhQm1OSDhwdDQ?usp=sharing)

The format of this report is the same as Basic Donors.

## Exotic.3 One Donor Report

This report lists the contact information and gifts for one Donor.



The screenshot shows a web browser window titled "A Web Page" with the address bar containing "http://donnador.com/reports3.html". The website header features the "Gift Garden" logo with a tulip illustration, a "Hyper surf:" search box, and an "Account" dropdown menu. The main content area is titled "One Donor Report" and includes a sub-header: "This report lists the contact information and Gifts from one Donor." Below this, there is a "Donor:" label and a dropdown menu currently displaying "McEnroe, John (don92)". Two buttons, "Report" (green) and "Cancel" (red), are positioned below the dropdown. The footer contains a copyright notice "© 2016" and links for "About" and "Help".

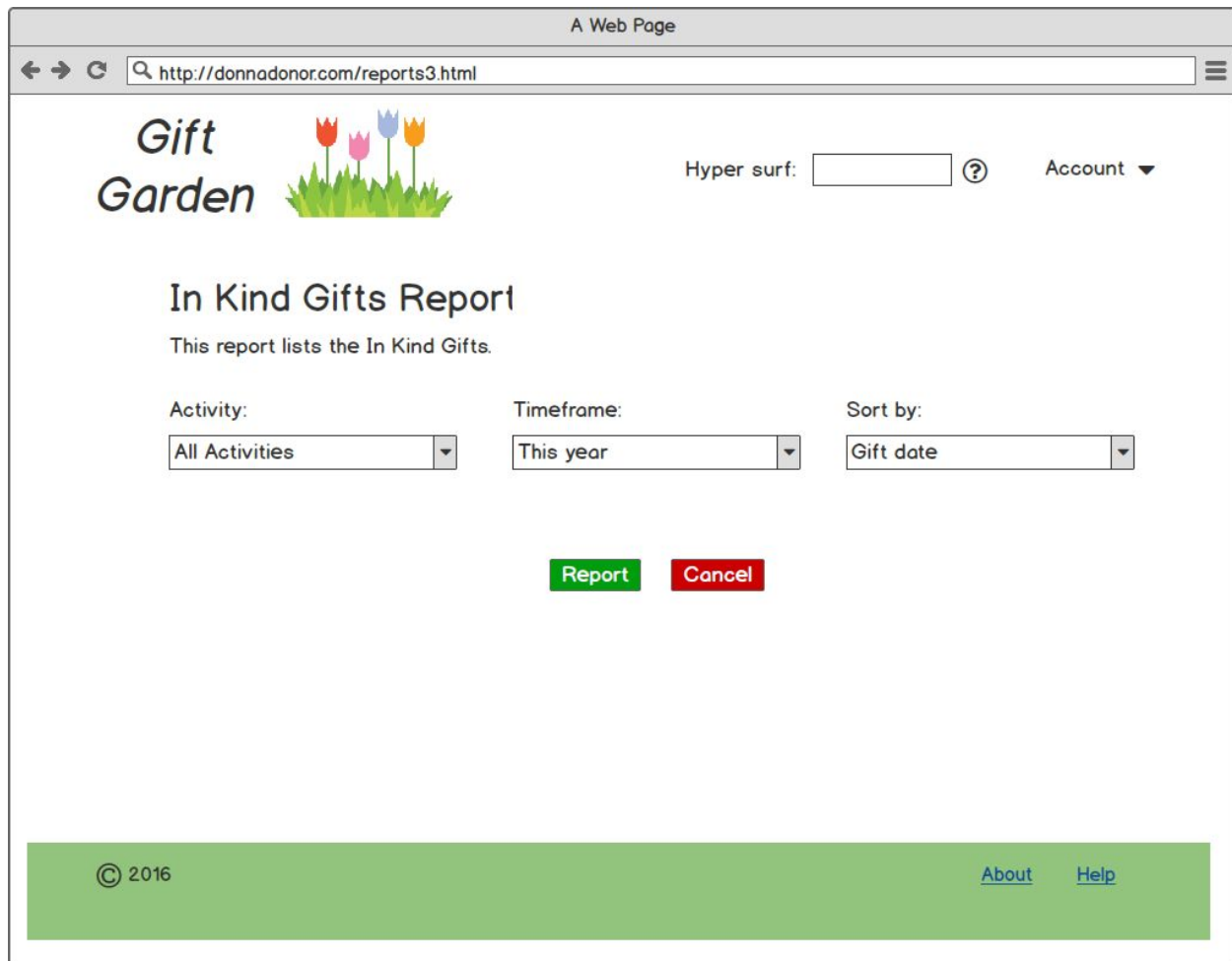
See **exotic\_one\_donor.pdf** example in shared Report folder:

[drive.google.com/drive/folders/0B9S7SNFbzdsRYIRhQm1OSDhwdDQ?usp=sharing](https://drive.google.com/drive/folders/0B9S7SNFbzdsRYIRhQm1OSDhwdDQ?usp=sharing)




## Exotic.4 In Kind Report

This report lists the Gifts with type “In Kind”.



A Web Page

← → ↻

**Gift Garden**  Hyper surf:  ? Account ▼

### In Kind Gifts Report

This report lists the In Kind Gifts.

Activity:  ▼

Timeframe:  ▼

Sort by:  ▼

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See **exotic\_in\_kind\_gifts.pdf** example in shared Report folder:

[drive.google.com/drive/folders/0B9S7SNFbzdsRYIRhQm1OSDhwdDQ?usp=sharing](https://drive.google.com/drive/folders/0B9S7SNFbzdsRYIRhQm1OSDhwdDQ?usp=sharing)


Should the Basic Gift Report have a “Gift Type” option?

## Exotic.5 Blue Report

This report lists the Activities in a year, subtotaled by Activity type.

A Web Page

← → ↻ http://donnadonor.com/reports3.html

**Gift Garden**  Hyper surf:  ? Account ▼

### Blue Report

This report lists Activities in a year, subtotaled by Activity type.

Year:  Sort by:

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See **exotic\_blue.pdf** example in shared Report folder:

[drive.google.com/drive/folders/0B9S7SNFbzdsRYIRhQm1OSDhwdDQ?usp=sharing](https://drive.google.com/drive/folders/0B9S7SNFbzdsRYIRhQm1OSDhwdDQ?usp=sharing)

Should Year be a spinner? Add years as time goes by?

Sort by choices are: {Activity ID, End Date, Progress}

That's all. That's enough.

thanks... yow, bill