



Blackbaud Data Warehouse Tables and QlikView Reporting Customization

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Agenda

- Demonstration of the tables in QlikView WRAP tool
- Overview of how we created the tables
- Share some of the challenges we had
- Share some of the benefits of the tables



WEB REPORTING APP (WRAP)

Demo

QLIKVIEW

- Web Reporting App (WRAP)









The screenshot displays the Qlikview Apps interface for Boston College. The top navigation bar includes the 'Spark BOSTON COLLEGE' logo, a search bar for 'Constituents' with a search icon and an 'Add new' button, and a series of tabs: Home, Constituents, Marketing and Communications, Revenue, Events, Prospects, Analysis, Fundraising, Administration, and Web. A left sidebar contains sections for 'Shortcuts', 'Recent searches' (listing Constituent, Purpose, Transaction, Designation, and Event searches), and 'Recently accessed'. The main content area is titled 'Qlikview Apps' and features a 'WRAP' tab and an 'Address Download' button. Below this is the 'Web Reporting App' section, which includes a 'Clear' button and a set of tabs: Home (selected), Selections, Selected List, GoTo, Global Search, Geo Search, and Output. The 'Home' tab displays a 'BOSTON COLLEGE' logo, a 'Welcome' message, the text 'Data last refreshed at: 6/19/2019 7:13:20 AM', and a link to 'Help & training documentation can be found by clicking below.' with a 'Qlikview Help' button. A sidebar menu on the left lists various data categories: Bio (Current Attributes, Historic Attributes, Involvement, Address, Email, Phone, Employment, School BC, School Other, Ugrad Status), Restrictions, Gift (Donor Status, Donor Status Div, Pledges, Summary All, Summary YTD, Summary Div, Summary Div YTD), Prospect, Relationship (Spouse, Child), and others.

“The Matrix”

Cash and Commitment Matrix						
Revenue Type	Transaction Type	Application	Controller's		Fundraising	
			Cash	Commit	Cash	Commit
Outright Gift	Payment	Donation	Yes	Yes	Yes	Yes
Recurring Gift	Recurring Gift	Donation	No	No	No	No
Recurring Gift Payment	Payment	Recurring Gift	Yes	Yes	Yes	Yes
Pledge - Conditional	Pledge	Donation	No	No	No	Yes
Pledge Payment - Conditional	Payment	Pledge	Yes	Yes	Yes	No
Pledge - Non-Conditional	Pledge	Donation	No	Yes	No	Yes
Pledge Payment - Non-Conditional	Payment	Pledge	Yes	No	Yes	No
Matching Gift Pledge	MG Claim	Donation	No	No	No	Yes
Matching Gift Payment	Payment	MG Claim	Yes	Yes	Yes	No
Bequest Pledge	Planned Gift	Donation	No	No	No	Yes
Bequest Payment	Payment	Planned Gift	Yes	Yes	Yes	No
Life Insurance Pledge	Planned Gift	Donation	No	No	No	Yes
Life Insurance	Payment	Planned Gift	Yes	Yes	Yes	No
CGA, CRAT, CRUT, CLAT, CLUT, Retained life estate, Pooled Income	Planned Gift	Donation	Yes	Yes	No	Yes
CGA, CRAT, CRUT, CLAT, CLUT, Retained life estate, Pooled Income	Payment	Planned Gift	No	No	Yes	No

Global Changes and Smartfields

- Recognition Credit – Hard, Soft, Assumed, Matching, Reporting
- Revenue Constituency – stamped on gift at point in time (static)
- Primary Household Member

Recognition credits (4)  Edit revenue constituency    More ▾					
Designation/Constituent	Amount	Type	Effective date	Constituency	Override
 Nursing School	\$25.00				
 Jamie T.	\$25.00	Soft	6/13/2018		
 Jamie T.	\$25.00	Reporting	6/13/2018	Revenue Grad Alum	
 Oscar E.	\$25.00	Hard	6/13/2018		

Data Dictionary – (*see detailed specifications)

Custom BBDW tables

#	TABLE	DESCRIPTION
1	BC_ALL_REVENUE	Split Revenue ID transaction level detail for all donors by Recognition Credit type
2	BC_SUMMARIES	Summary of the BC_ALL_REVENUE table by donor, by CASH and COMMIT totals, by fiscal year and by Division
3	BC_SUMMARIES_FLAT	Flatten BC_SUMMARIES by donor for CASH, COMMIT totals for last 10 fiscal years and Lifetime
4	BC_SUMMARIES_DIV_FLAT	Flatten BC_SUMMARIES by donor and by Division for CASH, COMMIT totals for last 10 fiscal years and Lifetime
5	BC_DONOR_STATUS	Using BC_SUMMARIES creates donor_status for all constituents for each fiscal year (for last 10 fiscal years)
6	BC_DONOR_STATUS_DIV	Using BC_SUMMARIES creates donor_status for all constituents by Division for each fiscal year (for last 10 fiscal years)
7	BC_DIRECT_MAIL	Biographical detail by constituent (includes primary address, education, spouse, constituency, etc)
8	BC_ADDRESS	Includes all valid addresses and incorporates logic for seasonal dates
9	FACT_REVENUECOMMITMENT_EXT	Includes detail by Split Revenue ID for all open pledges and includes past due, current due and next 5 years total due
10	BC_UGRAD_STATUS	For each fiscal year (for last 10 fiscal years) for all Undergraduate Alumni, create reunion groupings
11	BC_PARTICIPATION_STATIC	For each fiscal year store constituent's Undergraduate status and participation status at the start of each fiscal year
12	BC_SCHOOL	Boston College schools and groupings
13	BC_FISCAL_YEAR	Sets current fiscal year
14	BC_PROSPECT	Prospect detail by constituent (includes Prospect Manager, Rating, Prospect Status, etc)
15	BC_OPPORTUNITIES	Opportunity details
16	BC_EVENT_GUEST	Event detail by registrant

Total Amounts Reconcile at detail and summary

```
4 SELECT [CONSTITUENTLOOKUPID], [SUMMARY_PERIOD], [SUMMARY_DIV], [SUMMARY_TIME], [SUMMARY_TYPE], [SUMMARY_AMOUNT]
5 FROM [BBDW].[BC_SUMMARIES]
6 where [CONSTITUENTLOOKUPID] in ('8-10255415')
7       and [SUMMARY_TYPE] in ('CASH', 'COMMIT')
8       and [SUMMARY_DIV] = 'ALL'
9       and SUMMARY_PERIOD='FISCAL YEAR'
10 order by [SUMMARY_PERIOD], [SUMMARY_TYPE], [SUMMARY_TIME]
11 ;
12 SELECT [CONSTITUENTLOOKUPID], LIFETIME_CASH, LIFETIME_COMMIT, YEAR_0, YEAR_01, YEAR_02, CASH_0, CASH_01, CASH_02, COMMIT_0, COMMIT_01
13 FROM [BBDW].[BC_SUMMARIES_FLAT]
14 where [CONSTITUENTLOOKUPID] = '8-10255415'
```

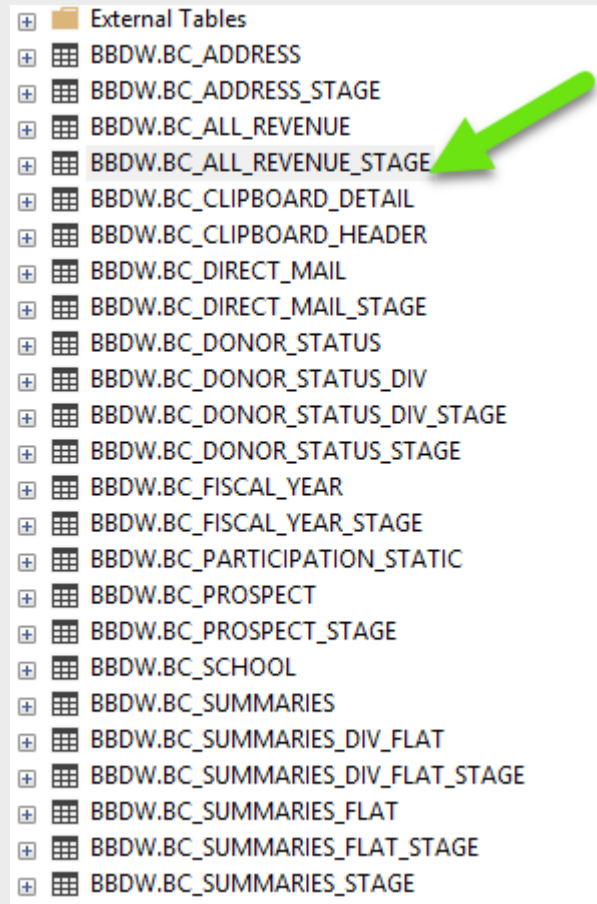
90 %

Results Messages

	CONSTITUENTLOOKUPID	SUMMARY_PERIOD	SUMMARY_DIV	SUMMARY_TIME	SUMMARY_TYPE	SUMMARY_AMOUNT
1	8-10255415	FISCAL YEAR	ALL	2019	CASH	140.00
2	8-10255415	FISCAL YEAR	ALL	2018	CASH	70.00
3	8-10255415	FISCAL YEAR	ALL	2017	CASH	50.00
4	8-10255415	FISCAL YEAR	ALL	2019	COMMIT	140.00
5	8-10255415	FISCAL YEAR	ALL	2018	COMMIT	70.00
6	8-10255415	FISCAL YEAR	ALL	2017	COMMIT	50.00

	CONSTITUENT...	LIFETIME_CASH	LIFETIME_COMMIT	YEAR_0	YEAR_01	YEAR_02	CASH_0	CASH_01	CASH_02	COMMIT_0	COMMIT_01	COMMIT_02
1	8-10255415	260.00	260.00	2019	2018	2017	140.00	70.00	50.00	140.00	70.00	50.00

_Stage tables used for ETL fails



A screenshot of a database interface showing a list of tables. A green arrow points to the table BBDW.BC_ALL_REVENUE_STAGE. The table is highlighted with a light blue background. The list includes various tables with names like BBDW.BC_ADDRESS, BBDW.BC_ADDRESS_STAGE, BBDW.BC_ALL_REVENUE, BBDW.BC_ALL_REVENUE_STAGE, BBDW.BC_CLIPBOARD_DETAIL, BBDW.BC_CLIPBOARD_HEADER, BBDW.BC_DIRECT_MAIL, BBDW.BC_DIRECT_MAIL_STAGE, BBDW.BC_DONOR_STATUS, BBDW.BC_DONOR_STATUS_DIV, BBDW.BC_DONOR_STATUS_DIV_STAGE, BBDW.BC_DONOR_STATUS_STAGE, BBDW.BC_FISCAL_YEAR, BBDW.BC_FISCAL_YEAR_STAGE, BBDW.BC_PARTICIPATION_STATIC, BBDW.BC_PROSPECT, BBDW.BC_PROSPECT_STAGE, BBDW.BC_SCHOOL, BBDW.BC_SUMMARIES, BBDW.BC_SUMMARIES_DIV_FLAT, BBDW.BC_SUMMARIES_DIV_FLAT_STAGE, BBDW.BC_SUMMARIES_FLAT, BBDW.BC_SUMMARIES_FLAT_STAGE, and BBDW.BC_SUMMARIES_STAGE.

+	External Tables
+	BBDW.BC_ADDRESS
+	BBDW.BC_ADDRESS_STAGE
+	BBDW.BC_ALL_REVENUE
+	BBDW.BC_ALL_REVENUE_STAGE
+	BBDW.BC_CLIPBOARD_DETAIL
+	BBDW.BC_CLIPBOARD_HEADER
+	BBDW.BC_DIRECT_MAIL
+	BBDW.BC_DIRECT_MAIL_STAGE
+	BBDW.BC_DONOR_STATUS
+	BBDW.BC_DONOR_STATUS_DIV
+	BBDW.BC_DONOR_STATUS_DIV_STAGE
+	BBDW.BC_DONOR_STATUS_STAGE
+	BBDW.BC_FISCAL_YEAR
+	BBDW.BC_FISCAL_YEAR_STAGE
+	BBDW.BC_PARTICIPATION_STATIC
+	BBDW.BC_PROSPECT
+	BBDW.BC_PROSPECT_STAGE
+	BBDW.BC_SCHOOL
+	BBDW.BC_SUMMARIES
+	BBDW.BC_SUMMARIES_DIV_FLAT
+	BBDW.BC_SUMMARIES_DIV_FLAT_STAGE
+	BBDW.BC_SUMMARIES_FLAT
+	BBDW.BC_SUMMARIES_FLAT_STAGE
+	BBDW.BC_SUMMARIES_STAGE

Links all associated transactions

```
1 select r.CONSTITUENTLOOKUPID,r.RECOGNITION_TYPE,r.REVENUE_LOOKUPID,r.REVENUE_DATE,r.REVENUE_TYPE,r.SPLIT_AMOUNT,r.LINKEDPLEDGEKEY
2 from BC_ALL_REVENUE r
3 where r.RECOGNITION_TYPE='Reporting' and r.LINKEDPLEDGEKEY='4BDEB8BB-F8E7-4931-BCBD-7385C85D8D1D'
4 order by REVENUE_LOOKUPID, REVENUE_DATE, RECOGNITION_TYPE
5 ;
6 select r.CONSTITUENTLOOKUPID,r.RECOGNITION_TYPE,r.REVENUE_LOOKUPID,r.REVENUE_DATE,r.REVENUE_TYPE,r.SPLIT_AMOUNT,r.LINKEDMGCLAIMKEY
7 from BC_ALL_REVENUE r
8 where r.RECOGNITION_TYPE='Reporting' and r.LINKEDMGCLAIMKEY='477EA788-A14E-432E-BD14-484317782882'
9 order by REVENUE_LOOKUPID, REVENUE_DATE, RECOGNITION_TYPE
```

0 %

Results Messages

	CONSTITUENT...	RECOGNITION...	REVENUE_LOOKUPID	REVENUE_DATE	REVENUE_TYPE	SPLIT_AMOUNT	LINKEDPLEDGEKEY
1	8-10019219	Reporting	M-4184530	2018-06-13	Pledge - Non-Conditional	25.00	4BDEB8BB-F8E7-4931-BCBD-7385C85D8D1D
2	8-10019219	Reporting	M-4197808	2018-08-31	Pledge Payment - Non-Conditional	25.00	4BDEB8BB-F8E7-4931-BCBD-7385C85D8D1D

	CONSTITUEN...	RECOGNITION_...	REVENUE_LOOKUPID	REVENUE_DATE	REVENUE_TYPE	SPLIT_AMOUNT	LINKEDMGCLAIMKEY
1	8-10275200	Reporting	M-3636229	2013-05-31	Outright gift	100.00	477EA788-A14E-432E-BD14-484317782882
2	8-10275200	Reporting	M-3648339	2013-08-09	Matching Gift Pledge	100.00	477EA788-A14E-432E-BD14-484317782882
3	8-10275200	Reporting	M-3667771	2013-10-23	Matching Gift Payment	100.00	477EA788-A14E-432E-BD14-484317782882



“WRITE BACK” TABLES TO OLTP

Tiles

Ad-hoc Query, Exports, Reports

Gift Receipts

Outbound files for integrations

Sophie Elefther
Individual Lookup ID: 8-1010672
Constituencies: Inactive Student BC Employee

Giving Summary	
Lifetime commit:	\$175.00
Lifetime cash:	\$175.00
Campaign FY17:	\$100.00

New Ad-hoc Query

- BC All Revenue
- BC Direct Mail
- BC Donor Status

Edit Export Definition -

Fields and criteria Columns

Find field:

Browse for fields in:

- BC Address
- BC All Revenue
- BC Direct Mail
- BC Donor Status

THANK YOU!

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