

SQL Server Reporting Services (SSRS) Reporting with ProgressCRM

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MakeTaplan Limited



Agenda

- ProgressCRM Reporting options
- What is SSRS
- Types of SSRS reports
- SSRS Report Examples
- Report Builder - overview
- Reporting Features

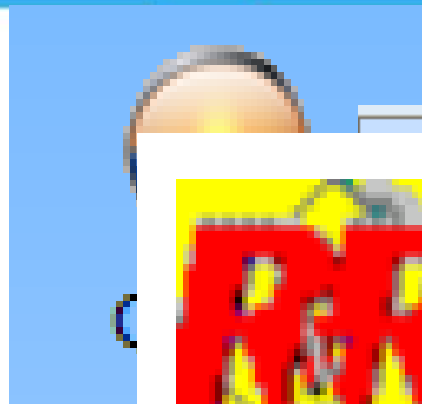


Reporting

- Why is it so important to produce reports?
 - Because you've been asked!
 - Track targets for appeals
 - Track (and reduce) expenses
 - Demonstrate how well are you doing
 - Enable future planning
 - Increase Income
 - Report to trustees



ProgressCRM Reporting



ProgressCRM - Software Licenced for Demonstration Only

File Information View Help

Database

- Income from active appeals
- Income this financial year by payment type
- Income this financial year by record type
- Mailable contacts by record type
- Mailable individuals by age, sex

Report Viewer

Agency/Value Report

Date Printed 04/11/2013
Page 1

		No of Gifts	Total Value of Gifts	Average	Highest	Earliest	Latest	Days since OK to Last Gift	Mail
2	Mrs D Acland	3	555.00	185.00	500.00	10/03/2012	17/06/2013	140	Y
3	Miss G M Acott	2	225.00	112.50	200.00	11/09/2010	28/01/2012	646	Y
4	Mr S Adames	2	450.00	225.00	400.00	10/03/2012	10/03/2012	604	Y
5	Dr G Adams	2	130.00	65.00	100.00	28/01/2012	24/07/2012	468	Y
6	Mrs M Adcock	2	208.00	104.00	123.00	09/11/2010	21/05/2013	167	Y
7	Mr & Mrs Addey	4	220.00	55.00	55.00	20/09/2009	20/09/2009	1506	Y
8	Mrs R Agnew	2	100.00	50.00	80.00	17/02/2009	06/12/2012	333	Y
9	Mrs A Ainsworth	5	270.00	54.00	62.50	20/09/2009	06/12/2012	333	N
11	Mrs R Alexander	1	300.00	300.00	300.00	28/01/2012	28/01/2012	646	Y
15	Mrs D Allen	1	10.00	10.00	10.00	17/02/2009	17/02/2009	1721	Y
17	Mr M E R Allsopp	6	540.00	90.00	250.00	11/09/2010	10/11/2012	359	Y
18	Mrs V Amini	2	175.00	87.50	150.00	07/12/2010	24/07/2012	468	Y
23	Mr M Archer	1	100.00	100.00	100.00	17/12/2010	17/12/2010	1053	Y
24	Ms H J Armitage	1	50.00	50.00	50.00	28/01/2012	28/01/2012	646	Y
27	Mr D Ashcroft	3	195.00	65.00	100.00	01/03/2009	17/06/2013	140	Y
28	Miss D Graham	1	69.00	69.00	69.00	01/02/2012	01/02/2012	642	Y

Page: 1 NUM



What is SSRS?

- SQL Server Reporting Service
 - is a server-based reporting platform from Microsoft that allows us to create and manage a wide variety of different types of report, and deliver them in a range of formats
 - First version in 2004 as an add on to SQL Server 2000
 - Oh and it's Free!



“Do I need to know SQL ?”

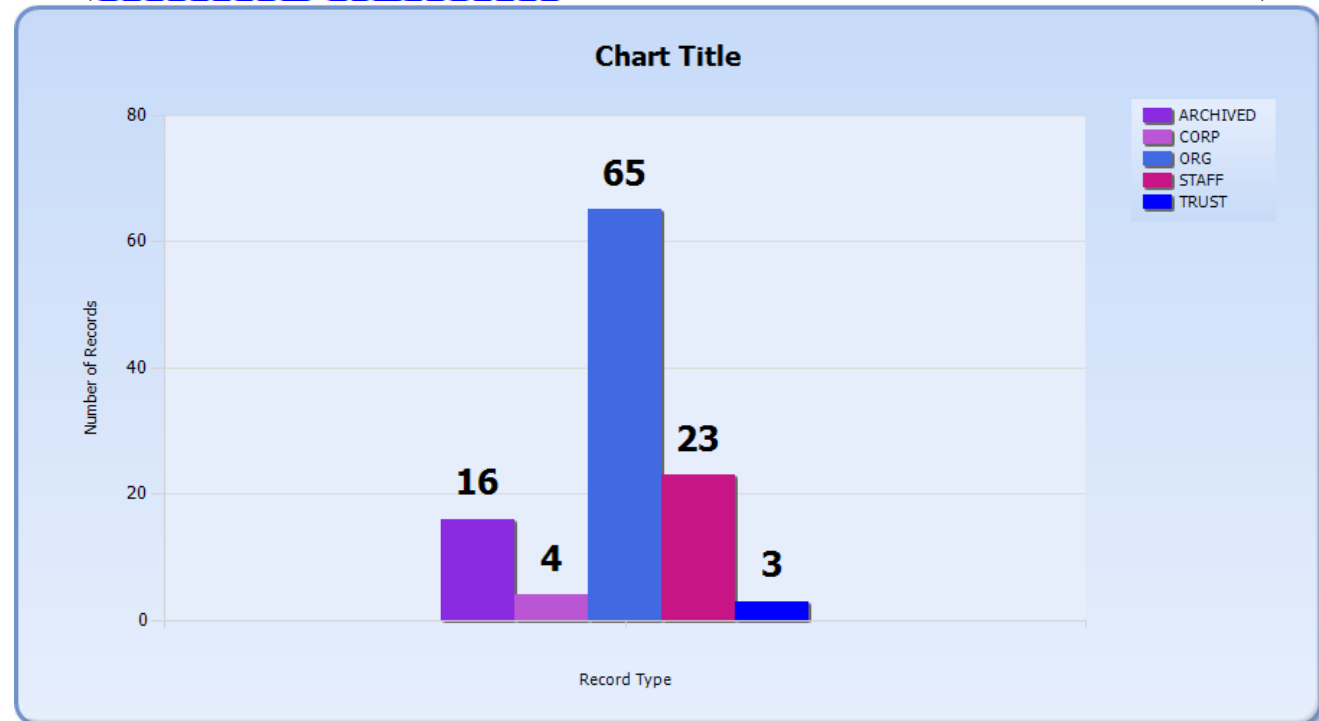
- No
- Built in Wizard
- Report builder builds and displays the SQL so you do not need to know SQL
- Can help understanding
- Using Report Builder can help you to learn SQL (if you are interested!)



Types of Reports

- Table
- Matrix
- List
- Charts

Donor Profile



Total Gifts £555.00

Largest Gift Amount £500.00



Browser Based Report Manager

Firefox | Gemma Cutler - Outlook Web App | Income Summary by Record Type - R... x

gspratt-w7/Reports_SQLEXPRESS14/Pages/Report.aspx?ItemPath=%2fProgress+Reports%2fFinance%2fIncome+Summary+by+Record+Type

MakeITaplan | Purple-Vision | ASI | Social | Tools | Personal Email | https://emea.salesforc... | unvented ticket plumb...

Home > Progress Reports > Finance > Income Summary by Record Type

Home | Site Settings | Help

1 of 1 | Find | Next

Record Type	Label Name	Number of gifts	No gifts this year	No gifts last year	Total value of gifts	Average gift
ARCHIVED		10	0	0	£375.00	£129.00
CORP		1	0	0	£20.00	£20.00
IND		2264	52	15	£2,603,817.81	£96,379.95
ORG		39	0	0	£3,510.00	£2,392.50
STAFF		15	1	0	£4,492.50	£3,520.69
TRUST		3	0	0	£6,530.00	£2,176.67
Total		2332	53	15	£2,618,745.31	£104,618.81

10/31/2014 9:46:44 AM



Access through ProgressCRM

ProgressCRM - Software Licenced for Demonstration Only

File Information View Help

Database

Our Database

Task List

Information

Search

Query

Utilities

Configuration

Finance

Fundraising

Security

General

Membership

Volunteer Reports

Volunteers by Area

http://gspratt-w7/Reports_SQLEXPRESS14/Pages/Report.aspx?ItemPath=%2fVolunteers+by+Area

Home > Volunteers by Area

Home | Site Settings | Help

1 of 1 100% Find | Next

Area Description	VOL_ADMIN	VOL_COLLEC	VOL_DIST	VOL_FIELD	VOL_IT	Total
East	19	7	16	15	3	21
East Midlands	5	10	12	8	2	12
London	3	41	7	0	7	42
North East	0	10	0	0	0	10
South East	1	22	0	0	0	23
Wales	1	0	0	0	0	1
West Midlands	6	0	0	0	0	6
Yorks & Humber	1	0	0	0	0	1
Total	36	90	35	23	12	116

11/3/2014 1:00:41 PM

(local)\sqlexpress\PrograssTraining\syson



Example Reports



Example Financial Summary reports

Month Paid	Amount Paid
January	£2,839.33
February	£14,129.23
March	£6,190.50
April	£1,436.93
May	£4,220.64
June	£53,595.00
July	£2,815.83
August	£2,501,272.00
September	£10,591.50
October	£11,569.00
November	£8,453.99
December	£6,056.49
Total	£2,623,170.44

Area Code	Amount Paid
LON	£268.00
OS	£350.00
UK-EA	£3,752.50
UK-EM	£7,928.50
UK-LON	£17,140.42
UK-NE	£2,795.00
UK-NI	£137.00
UK-NW	£5,089.64
UK-SC	£970.00
UK-SE	£2,543,601.10
UK-SW	£6,236.00
UK-WL	£4,969.00
UK-WM	£23,852.00
UK-YH	£11,561.08
YH	£20.00
Total	£2,628,670.24



Example Finance Reports

Income by Appeal - Spring

Source	Record No	Record Type	Label Name	Area Code	Type	Amount Due	Amount	Pay Method
SPRM2013	27265					£115.00	£0.00	
SPRM2014	94961					£230.00	£230.00	
SPRM2016	7503					£25.00	£25.00	
SPRM2021	7508					£10.00	£10.00	
SPRM2022	7509					£25.00	£25.00	
Total						£405.00	£290.00	



Example Finance Reports - Drill down

Source	Record No	Record Type	Label Name	Area Code	Type	Amount Due	Amount	Pay Method
⊕ SPRING04	27265					£115.00	£0.00	
⊖ SPRM2014	4104	IND	Mr P Clapton	UK-SE	DON	£10.00	£10.00	CHQ
	4763	IND	Ms R Bihari	UK-SE	DON	£25.00	£25.00	CHQ
	4951	IND	Mr W Evans	UK-SE	DON	£20.00	£20.00	CHQ
	5096	IND	Mr Kent	UK-WM	DON	£15.00	£15.00	CHQ
	5265	IND	Mr W Langham	UK-WM	DON	£10.00	£10.00	CHQ
	5309	IND	Ms Hedges	UK-WM	DON	£5.00	£5.00	CHQ
	5520	IND	Mr V Daniels	UK-SE	DON	£20.00	£20.00	CHQ
	7487	IND	Mrs L Doone	UK-SE	DON	£5.00	£5.00	CHQ
	7489	IND	Ms J Donald	UK-WL	DON	£20.00	£20.00	CHQ
	7490	IND	Mr J Lucas	UK-SW	DON	£5.00	£5.00	CHQ
	7492	IND	Ms E Nunn	UK-SE	DON	£25.00	£25.00	CHQ
	7495	IND	Mrs A Perks	UK-WM	DON	£10.00	£10.00	CHQ
	7499	IND	Mr L Dixon	UK-WM	DON	£20.00	£20.00	CHQ
	7500	IND	Mr G Strong	UK-WM	DON	£30.00	£30.00	CHQ
	7501	IND	Mr O Taylor	UK-SE	DON	£10.00	£10.00	CHQ
	94961					£230.00	£230.00	
⊕ SPRM2016	7503					£25.00	£25.00	



Example Finance Reports - Indicators

Indicators

Label Name	Total value of gifts	Total value of gifts
Mrs D Acland	£3115.00	●
Miss G M Acott	£225.00	●
Mr S Adames	£450.00	●
Dr G Adams		●
Mrs M Adcock		●
Mr & Mrs Addey		●
Mrs R Agnew		●
Mrs A Ainsworth		●
Ms K Albright		●
Mrs R Alexander		●
P R Alfandary, Esq		●
Mrs M K Allan		●
Mrs P E Allchin		●
Mrs D Allen		●
Mrs G Lloyd		●
Mr M E R Allsopp		●
Mrs V Amini		●
Ms J Andersen		●
Miss L Ball		●
Ms H J Armitage	£50.00	●
Mrs S Ashby	£0.00	●
Ms H J Armitage	£50.00	●
Mrs S Ashby	£0.00	●

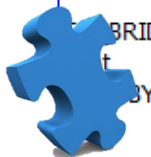


Example Reports - Drill Through Data

Area Code

Group	Prog No	Name	Address	DOB	Phone Number	Mobile Phone	Email
VOL_ADMIN	4946	Ms E Nunn	64 Downview Road WORTHING W Sussex BN11 4QS	07/02/1949			
VOL_COLLEC	50	Mrs H Carson	98 Bridge Street HORSHAM RH12 5HP		01903525916		holly.carson@advsol.com
VOL_COLLEC	541	Mrs H Davidson	43 Stanway Crescent Saltdean BRIGHTON BN2 8RR	11/10/1979			
VOL_COLLEC	543	Mr F Franks	62 Old Church Lane BRIDGE WELLS t BY	25/12/1970		0777 77777777	

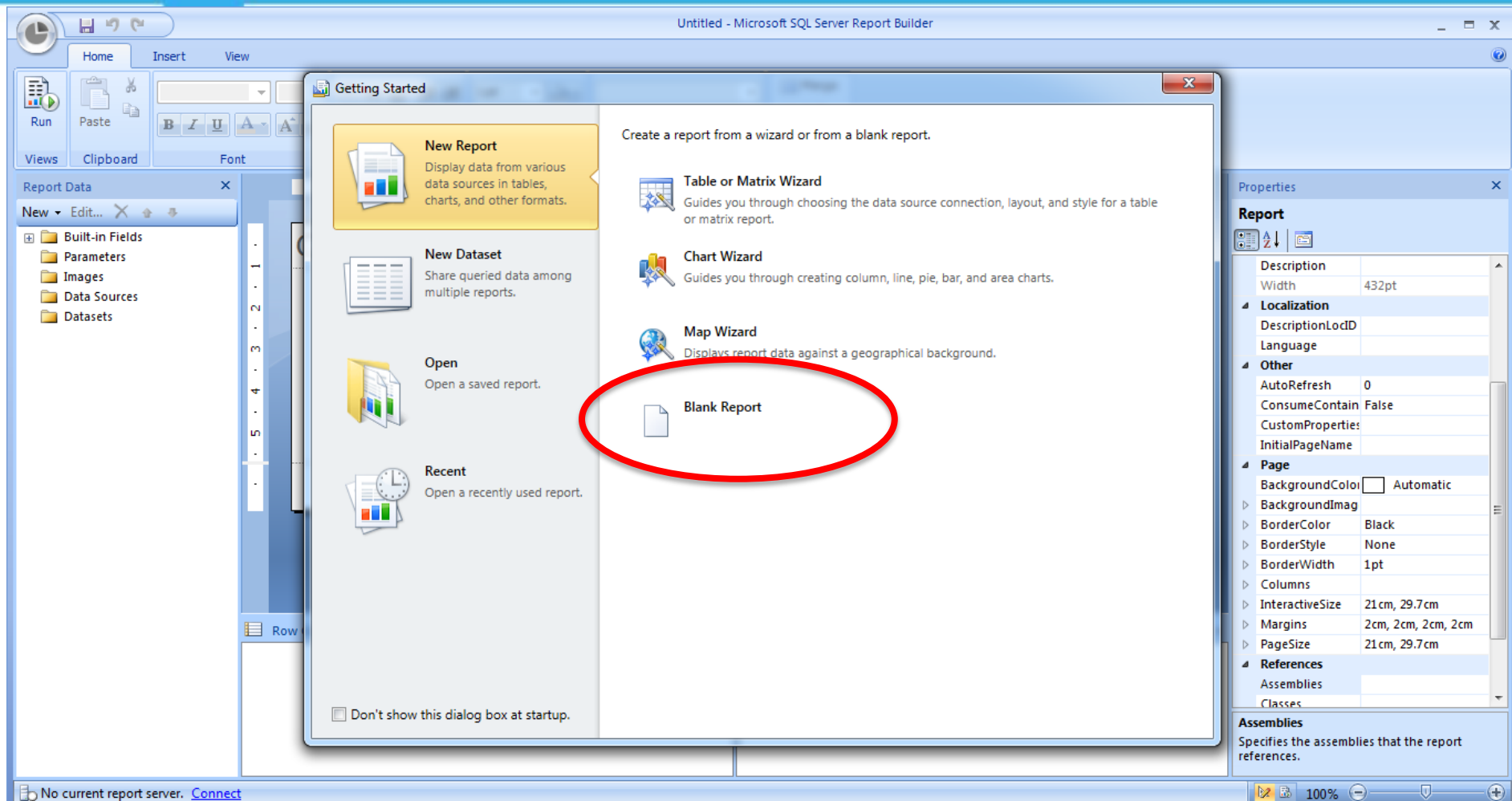
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Building a Report



Report Builder



Steps to Build a report

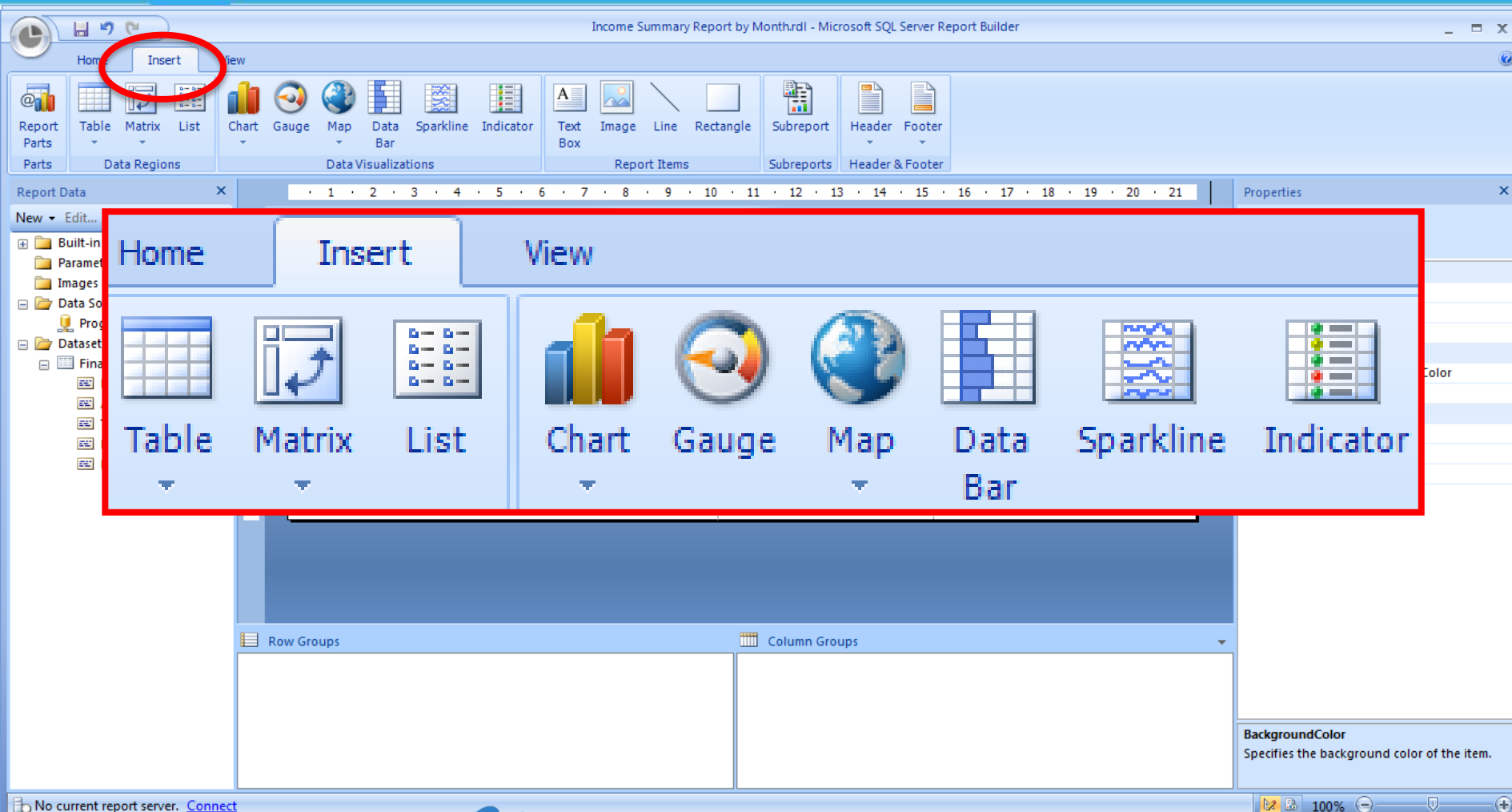


Table Report

Contact List

PVKEY	Record Type	Label Name	Address 4	Area Code	Phone Number	Email Address
4951	IND	Mr W Evans	WORTHING	UK-SE		walter@hotmail.co.uk
7504	IND	Ms V Turner	TELFORD	UK-WM		vicki_turner1@msn.com
557	IND	Mr A Beck	GLOUCESTER	UK-SW		tonybeck392@hotmail.com
7516	IND					TomSmith@hotmail.co.uk
5838	IND	Mr T Nightingale	LEEDS	UK-YH		terrryn@robbird.co.uk
7430	IND	Mr T Carter	EXETER	UK-SW		tcarter@advsol.com
7422	IND	Mr D Barrett	Hove	UK-SE		tbarrett@asieurope.eu
7426	IND	Mr D Barrett	HORSHAM	UK-SE		tbarrett@asieurope.eu
7425	IND	Mrs T Barrett	Hove	UK-SE	01273 770059	tbarrett@advsol.com
5840	IND	Miss S Butcher	BRIGHTON	UK-SE		sylviab@robbird.co.uk
7393	IND	Mrs S Williams	STEYNING	UK-SE	01903 123876	swilliams@njslatertrust.org.uk
5609	IND	Mr S Sawyer	WOODBRIDGE	UK-EA		spsawyer567@hotmail.com
7509	IND	Mr D Shine	SHEFFIELD	UK-YH		shinedesmond@yahoo.co.uk
182	IND	Mr S Carter	NEWHAVEN	UK-SE	01238 446126	scarter@terrapins-newhaven.co.uk



Matrix report

Area Description	VOL_ADMIN	VOL_COLLEC	VOL_DIST	VOL_FIELD	VOL_IT	Total
East	19	7	16	15	3	21
East Midlands	5	10	12	8	2	12
London	3	41	7	0	7	42
North East	0	10	0	0	0	10
South East	1	22	0	0	0	23
Wales	1	0	0	0	0	1
West Midlands	6	0	0	0	0	6
Yorks & Humber	1	0	0	0	0	1
Total	36	90	35	23	12	116



List Report

Ability to create Free form reports

Donor Profile

Record Number 2

Gender F

Age 54

Mrs D Acland

DOB 8/1/1960

Job Title

17 Green Lane
Hendon
LONDON
NW4 2NL

Phone Number 0181
123456

Email

Total Gifts £555.00

Largest Gift Amount £500.00



Report Wizard

Income by Appeal.rdl - Microsoft SQL Server Report Builder

Report Data

New Edit...

Built-in Fields
Parameters
Images
Data Sources
Datasets

Income by Appeal

Source	Record No	Record Type	Label Name	Area Code	Type	Amount Due	Amount	Pa
[Transaction_	[PVKEY]	[Record_Type]	[Label_Name]	[Area_Code]	[Transaction_T	[Sum(Amount_]	[Sum(Amount_]	[P
Total	[Sum(PVKEY)]					[Sum(Amount	[Sum(Amount	

[&ExecutionTime]

Row Groups

Transaction_Source

(Details)

Column Groups

Properties

Selected Text

Action
Action None

Alignment
Indent
SpaceAft
SpaceBe
TextAlign Default

Font
Color Black
Font Verdana, 20pt, Default, Default
LineHeig

General
ToolTip

Lists
ListLevel 0
ListStyle None

Localization
Calendar Default
Language
Numeral 1
ValueLoc

Number
Specify an action associated with the report item. Actions include a jump to a bookmark,...

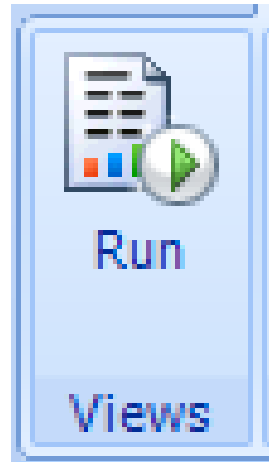
No current report server. [Connect](#)

100%

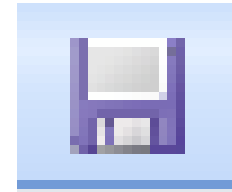


Preview / Run Report

F5



Ctrl + S



F8



SSRS Features

- Report Manager
- Simple Report Wizards
- Drill down and drill Through ability
- Grouping
- Multiple Parameters
- Visuals – Indicators/Charts/Graphs
- Easy formatting
- Insert images/logos



Report Extraction - Browser

Home > Progress Reports > Events > Event Registrants

Choose Event

1 of 1 Find | Next

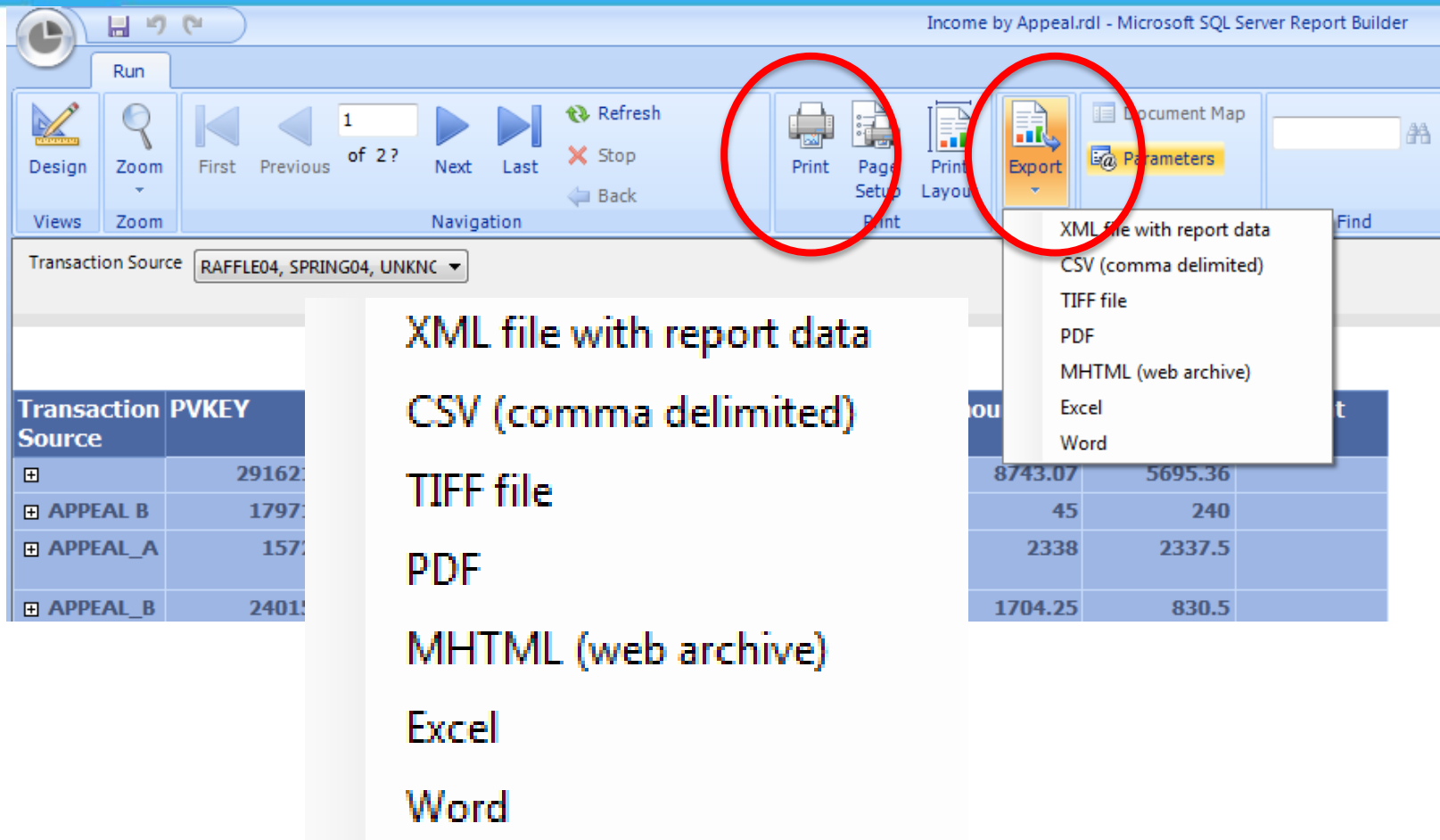
PDF
Excel
Word

Event Description	Delegate Type	Label Name	optiondesc	quantity
Executive Lunch	DELEGATE	Mr S French	Main Registration	1
	DELEGATE	Miss A Grantley	Main Registration	1
	DELEGATE	Mr D Carpenter	Main Registration	2

- Access through a Browser
- Save to PDF
- Export to Excel
- Export to Word



Report Extraction – Report Builder



The screenshot shows the Microsoft SQL Server Report Builder interface. The title bar indicates the report is 'Income by Appeal.rdl'. The 'Run' tab is active, showing navigation controls like 'First', 'Previous', 'Next', 'Last', 'Refresh', 'Stop', and 'Back'. The 'Transaction Source' is set to 'RAFFLE04, SPRING04, UNKNC'. The 'Export' button is circled in red, and its dropdown menu is open, listing the following options:

- XML file with report data
- CSV (comma delimited)
- TIFF file
- PDF
- MHTML (web archive)
- Excel
- Word

Below the menu, a list of transaction sources is visible:

Transaction Source	PVKEY
+	29162
+	APPEAL B 1797
+	APPEAL_A 157
+	APPEAL_B 2401

To the right, a portion of a data table is visible:

8743.07	5695.36
45	240
2338	2337.5
1704.25	830.5



About those sweets



Want to learn more?

Training Courses

- SSRS Training Course
 - Level 1 & Level 2
- Pre-requisites
 - Understanding of ProgressCRM and its Table Structure
- In addition - 1 Day SQL Skills for ProgressCRM
- Commission to write reports



Thank you



Thank you for listening

