

# Gnosis Queries & Reporting

CSC Monthly Webinar #4

# Your Requests

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# Getting Started – Choosing the Best Schema

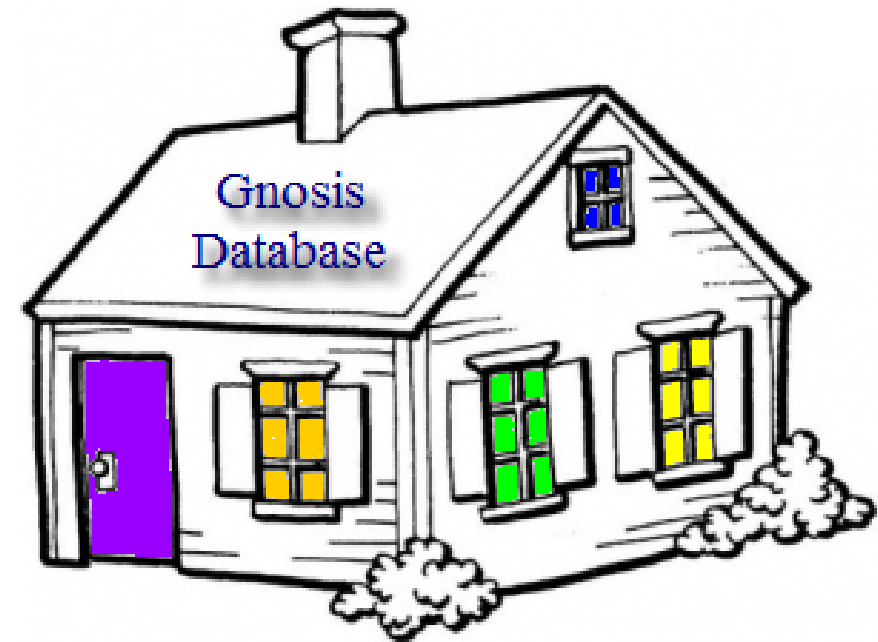
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Think of your database as a *house of data*.

This house has a number of rooms and each room has one or more windows. Each of the windows lets you view a different part of the house.

In this analogy, the rooms are areas of your database (such as donations or events), and the windows and doors are a view (schema) of the inside of your database house.

Each window or door provides a different perspective of various parts of your database house.



# Getting Started – Copy Existing, Use Ad-Hoc?

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The three common ways to start a query:  
*(in my order of preference)*

1. In the Report Center: Copy an existing similar report and modify it (Use categories and the search bar to find existing reports based on a keyword.
2. In the Ad-Hoc Queries Form: Use it as a canvas for your new creation
3. In the Report Center: Create a new report from scratch.

# Getting Started – Choosing the Best Schema

Desired Purpose	Recommended Schema
<b>Individual Persons</b> information with summarized data from their activities	*Persons with H'hold & Org & Related Info
<b>Households</b> info with one result row per household, generally used for surface mail to households.	Persons Grouped by Households & Related Info
<b>Organization List</b> with contact info and summarized invoice history	Organizations With Contacts & Financial History
<b>Contributions, Contributors &amp; Financials</b> for acknowledgments and/or transaction level reporting	Contributions, Contributors & Financials
<b>Gnosis database user</b> reporting, such as login history.	Database User Information
<b>Opportunity reporting</b> with details of linked organization and person records	Opportunities/People/Organizations
<b>Subscriptions/Pledges/Planned Giving</b> reporting and communications, based on subscriptions.	Subscription & Billing Information
<b>Email sending analysis</b> based on a log of persons receiving specified email messages.	Email Analysis
<b>Event-centric management</b> , planning and reporting ( <i>other than</i> registration, bookings and attendance)	Event Administration
<b>Event registration</b> related reporting and communications.	Event Registration Administration
<b>Event bookings</b> related communications & reporting - centering around the person booking.	Event Bookings Communication & Financials
<b>Event Attendance</b> reporting and communications, including registration details if any.	Event Attendance

# Complex Report Criteria in Gnosis

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Participants that are active in one or more of a specified list of groups or have attended since a specified period, or had recent contact of a specified type since a specified period, but only where they have an email address.

# Complex Report Criteria in Gnosis

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## Sentence Analysis:

- What is restricted (eye color, height)
- The value of the restriction (blue, 6'2")
- The grouping type (and/or)

# Complex Report Criteria in Gnosis

Participants that are active in one or more of a specified list of groups **or** have attended since a specified period, **or** had recent contact of a specified type since a specified period, **but only** where they **have** an email address.

**BLUE:** What is restricted

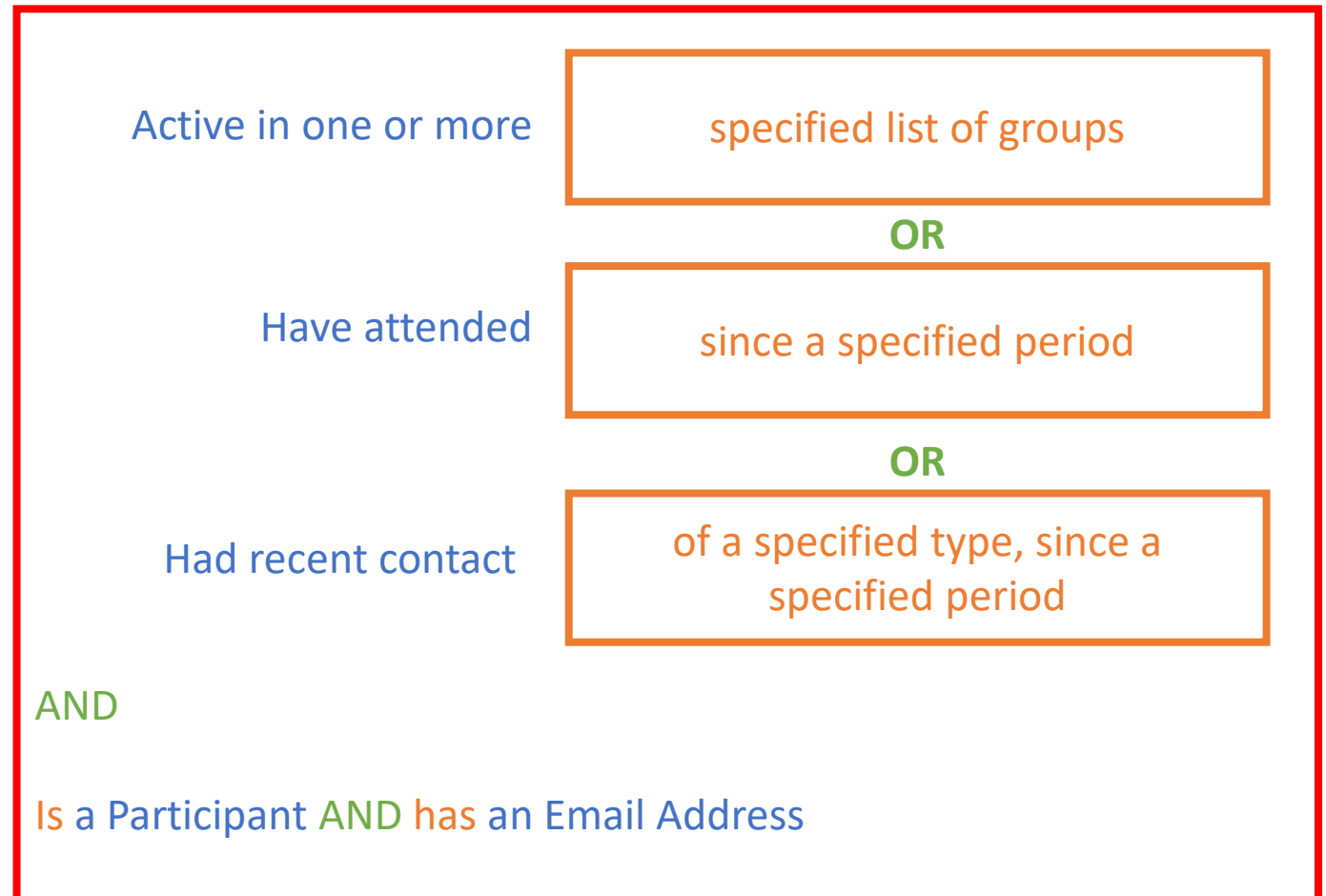
**ORANGE:** The value of the restriction

**GREEN:** The grouping type



# Complex Report Criteria in Gnosis

Participants that are active in one or more of a specified list of groups or have attended since a specified period, or had recent contact of a specified type since a specified period, but only where they have an email address.



# Complex Report Criteria in Gnosis

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Active in one or more

Specified list of groups

Choose records where all of the following apply

- Group Name ID is in (list) <List: 3 Entries>
- + → Group Member is Active is True

**AND**

**AND**

# Complex Report Criteria in Gnosis

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Have attended

Since a specified period

Choose records where all of the following apply

+ → Most Recent Attendance is greater than Run Time Less 840d

# Complex Report Criteria in Gnosis

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Had recent contact

of a specified type, since a  
specified period

Choose records where all of the following apply

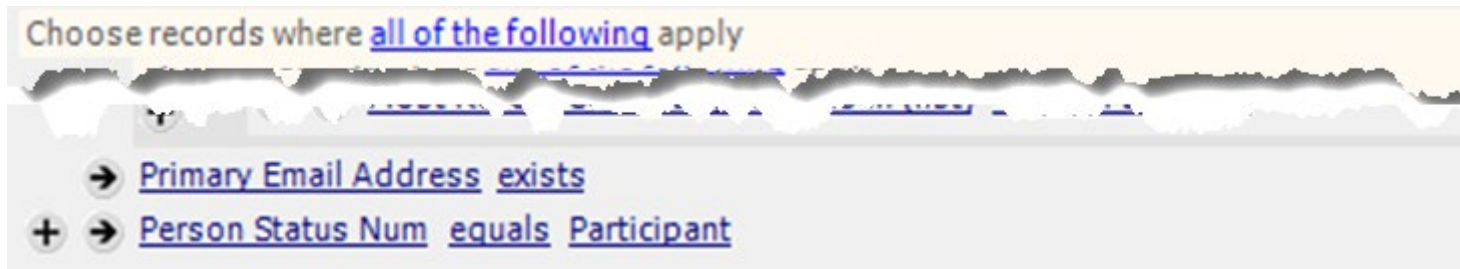
- Most Recent Logged is greater than or equal to Run Time Less 840d
- + → Most Recent Contact Type ID is in (list) <List: 4 Entries>

# Complex Report Criteria in Gnosis

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AND

Is a Participant AND has an Email Address



# Complex Report Criteria in Gnosis

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Specify Your Desired Search Criteria Below

Choose records where [all of the following](#) apply

Choose records where [any of the following](#) apply

Choose records where [all of the following](#) apply

- [Group Name ID is in \(list\) <List: 3 Entries>](#)
- + → [Group Member is Active is True](#)

Choose records where [all of the following](#) apply

- + → [Most Recent Attendance is greater than Run Time Less 840d](#)

Choose records where [all of the following](#) apply

- [Most Recent Logged is greater than or equal to Run Time Less 840d](#)
- + → [Most Recent Contact Type ID is in \(list\) <List: 4 Entries>](#)

- + → [Primary Email Address exists](#)
- + → [Person Status Num equals Participant](#)

# Complex Report Criteria in Gnosis

**Specify Your Desired Search Criteria Below**

Choose records where all of the following apply → **ALL OF**

Choose records where any of the following apply → **ANY OF**

Choose records where all of the following apply

- Group Name ID is in (list) <List: 3 Entries>
- + → Group Member is Active is True

Choose records where all of the following apply

- + → Most Recent Attendance is greater than Run Time Less 840d

Choose records where all of the following apply

- Most Recent Logged is greater than or equal to Run Time Less 840d
- + → Most Recent Contact Type ID is in (list) <List: 4 Entries>

+ → Primary Email Address exists

+ → Person Status Num equals Participant

Is an **active member of a group**

**OR**

**Participant** Attending **Since** a specified date

**OR**

Has a contact record of **specific type** since **period**.

**AND**

**Has an email** address

**AND**

**Is a Participant**

# Complex Report Criteria in Gnosis

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Lets actually build the query...

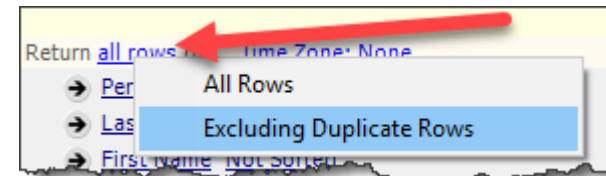


# Complex Report Criteria in Gnosis

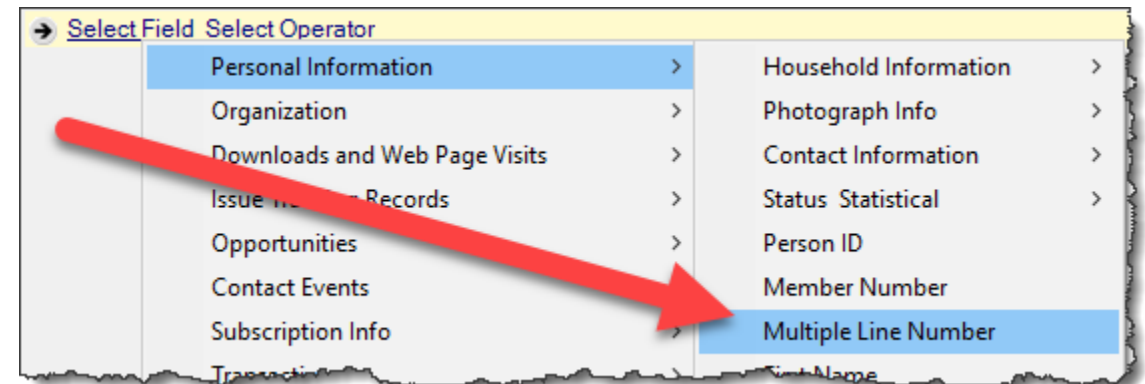
- **Eliminating Duplicates**

- Caused by one or more fields value having multiple values  
i.e.: Person has multiple business phone numbers

If multiple value data *is not* included in your output



If multiple value data *is* included in your output, but you want the *first value only*



# Complex Report Criteria in Gnosis

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- **Eliminating Duplicates**

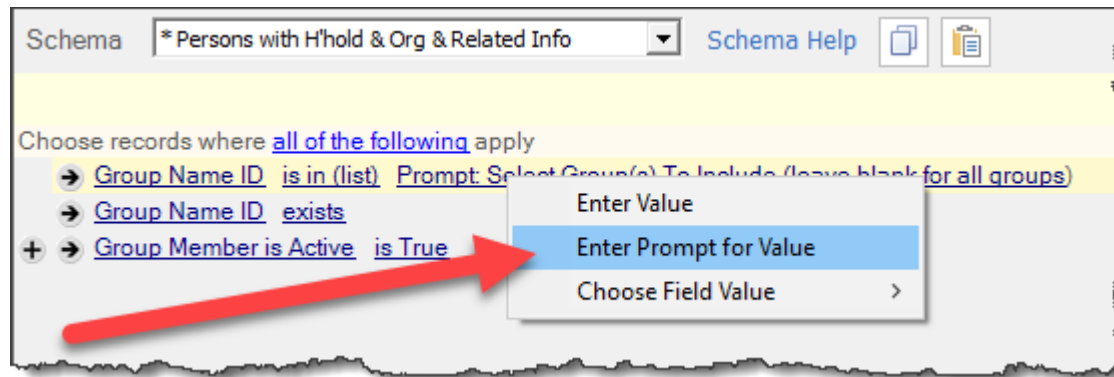
- Caused by one or more fields value having multiple values  
i.e.: Person has multiple volunteer attendances each having hours to total

Use Aggregation If you want to specifically deal with duplicate data columns using one of:

- Min (First or lowest value)
- Max (last or highest value)
- Count (how many values)
- Count Unique (how many unique values)
- Sum (Add all of the numbers)
- Average ( of all the numbers)

# Additional Query Options for Flexibility

- Prompting for Filter Criteria



# Additional Query Options for Flexibility

- Setting a Date/Time Filter Relative To Run Time

The screenshot shows a query builder interface. At the top, it says "Choose records where [all of the following](#) apply". Below this, there is a filter rule: "+ → Group Date Joined is greater than or equal to <Enter Value>". A red arrow points from the "<Enter Value>" field to a dropdown menu. The dropdown menu has several options: "Enter Value", "Enter Value (with Time)", "Enter Prompt for Value", "Choose Field Value", and "Choose Special Value". The "Choose Special Value" option is highlighted in blue. A second red arrow points from "Choose Special Value" to a sub-menu. The sub-menu has several options: "this calendar year", "last calendar year", "This Year To Date", "Query Run Date Plus/Less ? Days", and "Query Run Time Plus/Less ? Period". The "Query Run Time Plus/Less ? Period" option is highlighted in blue. Below the main interface, there is a separate section showing the filter rule "is greater than or equal to" followed by a field for "Negative" (with a checkbox), and then four input fields for "0", "week(s)", "0", "day(s)", "0", "hour(s)", and "0", "minute(s)".