

DRAFT Report Descriptions

SelCtl Land Trust Database Development Project

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Purpose

This document provides high-level descriptions of reports required from the new system.

Report Descriptions

Contact Report

Displays a list of contacts between staff parties that match user-specified selection criteria.

The selection criteria may include:

- Staff person(s) involved in the contact

- The “relationship” or person that was involved in the contact

- The subject area(s) covered by the contact (for example, “donation”, “easement project”, “art auction”, etc.)

- The time period during which the contact occurred (with a start date/end date range)

Information displayed includes:

- Donor relationship name

- Staff member name

- Contact subject(s)

- Notes from the contact

- Contact date

Easement Project Landowner Report

Displays information about landowners associated with an easement project.

This report is generated on January 1 of each year.

The selection criteria are:

- Parties involved in easement project in the role of “landowner” are included.

This report is generated on January 1 of each year.

Displayed information includes:

- Easement project

- Property name

- Easement project manager

- Name of primary staff contact

Party name

Name of primary contact for the party

Name of spouse for the primary contact

For all locations associated with the “party”:

Location type

Street address

City

State/Province

Country

Postal Code

Phone numbers associated with the location

Phone numbers associated directly to the “party” rather than to specific locations

Name of primary staff contact

All “party category” codes assigned to the “party”

All “groups” to which the “party” belongs at the time the report is generated.

Property manager/caretaker

The displayed information is arranged by easement project

Group Composition Report

This report displays a list of parties belonging to a specified group as of a user-provided “effective date”. I proposed this mostly an on-screen group membership review tool for database users.

Information displayed includes:

Relationship ID

Relationship name

For primary relationship contact:

First name

Last name

Membership start date?

Membership end date?

Land Steward Easements

Displays a list of all easements meeting user-specified selection criteria.

The selection criteria may include:

Staff person(s) involved as “land stewards”

The region(s) in which easements are located

Information displayed includes:

Easement project ID

Land steward name

Name of primary staff contact for the landowner involved in the easement

Locations

Location Report

Displays a list of all locations meeting a user-specified set of selection criteria.

The selection criteria may include:

Counties into which locations fall

Region(s) in which the location falls

State(s) in which the location falls

Information displayed includes:

For each location:

Location ID

Attributes of location (address, city, etc.)

The name of the primary contact for each “party” associated with the location

Mail-Merge Document

DOS file containing information required to perform a basic letter merge for a select group of individuals. Set up specifically to feed information to MS-Word letter merge operations. The information displayed characterizes a group of relationship/persons matching a set of selection criteria specified by the user:

The selection criteria may include:

Membership in some defined group as of a particular “effective date”

Persons that have made donations:

Of particular types

Of particular funds

within a user-specified size range

during a specified time period

Persons involved in an easement

Persons with user-specified “category codes” applied to them

Information used will include:

Relationship name

For primary relationship contact:

First Name or Nickname?

Last Name

Name prefix

For primary location:

Street Address

City

State/Province

Postal Code

Mailing Labels

Mailing labels for a group of relationships, organizations, persons, etc. meeting a set of user-specified selection criteria.

The selection criteria may include:

Membership in some defined group as of a particular “effective date”

Persons that have made donations:

Of particular types

Of particular funds

within a user-specified size range

during a specified time period

Persons involved in an easement

Persons with user-specified “category codes” applied to them

Information used will include:

Party name

Street Address (for primary contact location)

City (for primary contact location)

State/Province (for primary contact location)

Postal Code (for primary contact location)

Country (for primary contact location)

Mailing Service File

This will be a DOS file that contains the information needed for a mailing service to perform a mailing assembly operation. The file will be a DOS text file with tab-separated fields.

The selection criteria may include:

Membership in some defined group as of a particular “effective date”

Persons that have made donations:

Of particular types
Of particular funds
within a user-specified size range
during a specified time period

Persons involved in an easement

Information used will include:

Relationship ID
Relationship name
Street Address (for primary contact location)
City (for primary contact location)
State/Province (for primary contact location)
Postal Code (for primary contact location)
Country (for primary contact location)

Party Address Report

This report provides information that might be exported from the database for a staff member's inclusion in an address book or similar?

The user would select "parties" to be included in the report based on:

Name of primary staff contact is
region that the individual maintains a location in
Parties with user-specified "category codes" applied to them

Membership in specified groups as of a specified "effective date".

Information used will include:

Relationship name
First Name or Nickname?
Last Name
Name prefix
Street Address
City
State/Province
Postal Code

Party Donation Detail

For a user-selected group of parties, this report lists information about each donation made within a specified time period (defined by a start date and end date). The donations are ordered by party and then by donation date.

The user might choose the donations to be included based on the following selection criteria:

Time period in which the donation was made

Whether the “donation” record represents a fulfilled pledge or an unfulfilled pledge

Which staff member was associated with the donation

Whether the donation is a proxy donation

Whether the donation falls into a user-specified size range

Donation type (“individual”, etc.)

Fund(s) to which donations were made

Information displayed includes:

Donor party name

For each donation matching the selection criteria:

Donation date

Amount

Pledge (yes/no)

Pledge amount

Proxy donation (yes/no)

Proxy donation original donor relationship name

Fund contributed to

Sum of “amount” values

Sum of “pledge amount” values

[LB – Would a sum of the amount for all listed donations for an individual/relationship be useful?]

[LD – Yes, otherwise they would just be adding them up (and some individuals are too great at adding so if the report could do it we would be much better off).]

[LB – Should this report also include “in-kind”, “material” donations and similar, for which a “value” rather than an “amount” would be used?]

Party Donation Summary

(Very similar to the Donation Detail report, but with concise summaries displayed for each individual rather than detailed displays of each donation.)

For a user-selected group of parties, this report lists information about each donation made within a specified time period (defined by a start date and end date). The displayed information is ordered by party name.

The user might choose the donations to be included based on the following selection criteria:

Time period in which the donation was made

Whether the “donation” record represents a fulfilled pledge or an unfulfilled pledge

Which staff member was associated with the donation

Whether the donation is a proxy donation

Whether the donation falls into a user-specified size range

Donation type (“individual”, etc.)

Fund(s) to which donations were made

Information displayed includes:

Donor relationship name

For each fund contributed to:

Fund(s) to which the individual/relationship donated during the time period

Total amount contributed to the fund