

## TAS Self-Service Reporting Overview

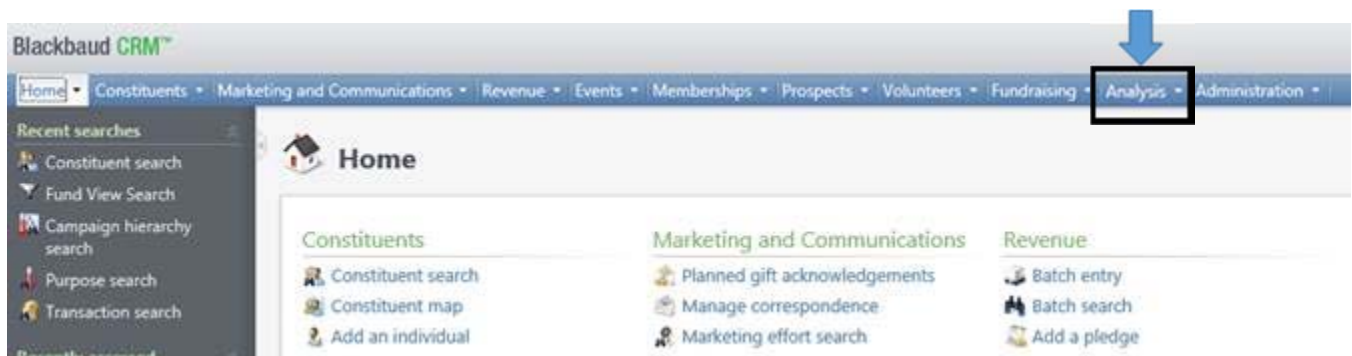
TAS provides several self-service reporting tools. This document briefly describes how to access them and gives a basic explanation of their functionality. It does not attempt to explain how to use the tools in detail. That information is provided through training courses provided by Advancement IT's training staff. For more information see the TAS Navigation and Constituent View, Fund View and My Reports training classes.

### Access to TAS Self-Service tools

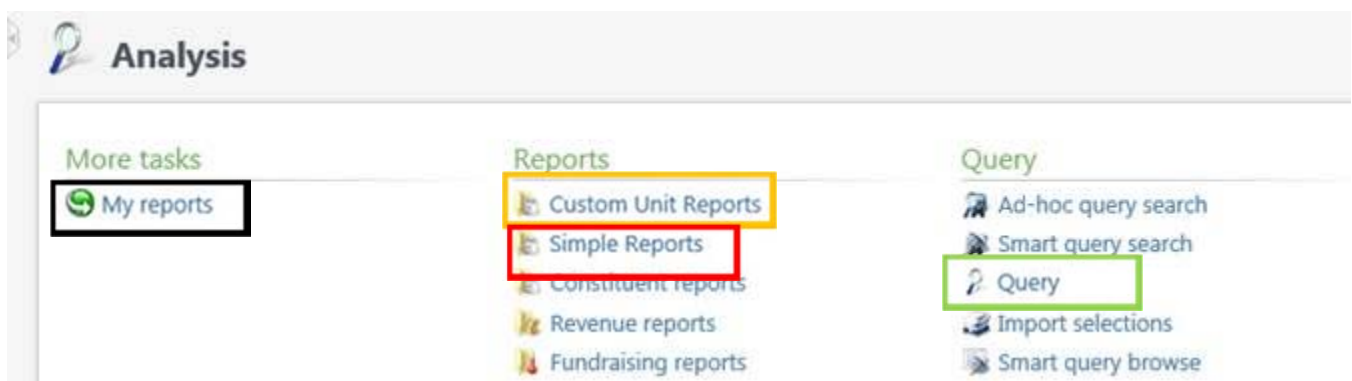
To receive access to TAS's Simple Reports and Custom Unit Reports Self-Service tools you must attend either the TAS Navigation and Constituent View or Fund View training class. On completing those classes you will be granted access.

### TAS Analysis Tab

To locate self-service reporting tools go to TAS – Analysis tab.



Depending on your security level you will see something like the following. The four self-service tools highlighted are introduced below.



### Simple Reports

- Simple Reports are self-service reports designed around standard query options (or parameters) that are combined with standard outputs (either data lists like Excel or PDF files)

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- Each Simple Report actually consists of two reports, a help report and the report itself.
- They are designed with the assumption that no special query skills and only limited introductory training is required.
- They do assume a general level of advancement understanding and TAS familiarity so access is granted only after completing the TAS Navigation and Constituent View or Fund View training classes.

You will see a list of all simple reports available to use.




Each Simple Report will consist of:



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- A Help report (1) which provides basic information on the report including preferred output format, information on the report cover sheet, parameters and output

 **Fundraising Designation Profile Help Report**

THE OHIO STATE UNIVERSITY

### Designation Profile

The Designation Profile report provides a large collection of information about designations (also referred to as "funds") formatted as a spreadsheet with one fund per row (see parameters for an exception to this).

All report data is generated out of the reporting data warehouse which operates on a delay, therefore data entered into TAS is not available via reporting on the same day. TAS data is copied into the warehouse overnight during the early hours of the morning, so the delay between TAS and the warehouse is typically less than 24 hours.

**Preferred Output Format(s):** XLS, CSV

**Cover Sheet**

The report cover sheet provides basic information about how and when the report data was generated.

#	Name	Description
1	Run Date	Date and time the report was generated
2	Data Date	Date and time that the reporting data warehouse was last refreshed
3	Row Count	Number of data rows produced. (A warning notice will appear here if the output generates more than 65K rows, which is the limit for Excel exports.)
4	Parameters	Displays the parameter values that were used to generate the report

**Parameters**


This report has a number of parameters which determine what records are returned and which columns are displayed. Parameters marked with an asterisk (\*) require user action.

#	Name	Description
1	* Unit Type	Select which type of unit to use to pull funds: Unit (CDO), SubUnit (SDR), VPDean, Home Department, Department Org, or Designation
2	Unit Selection	Select specific units for Unit CDO, SubUnit (SDR), VPDean, or Home Department
3	Include Closed Funds	Option to include closed funds, exclude closed funds, or include closed funds that have an end date within
14	Column Groups	Show or hide specific column groups

**Output Columns**

Group	Name	Description
(I) Core	ID, names, descriptions, and the report run date	
(II) Fund Profile	Units and classifications that the designation is associated with as well as basic information about the fund	
(III) Development Activity	Information related to the fund's incoming revenue stream and how long it is being held	
(IV) Endowment Principal	Information pertaining to an endowed fund's principal	
(V) Endowment Distribution	Distributions fund(s), split fund information, projected and distributed income	

- The report itself (2) that will consist of a top parameters sections where the values to search on are entered, and the output displays in the bottom of the page.

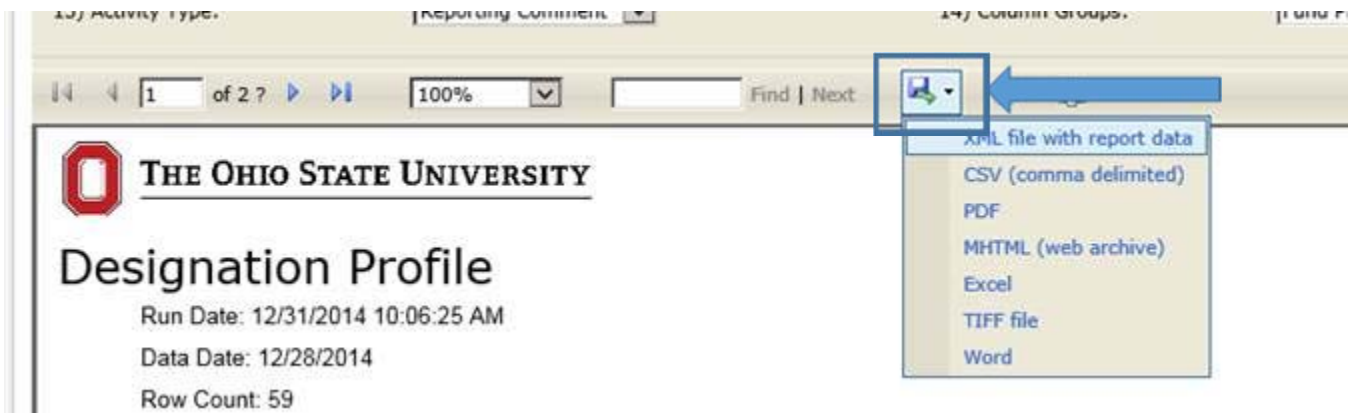
 **Fundraising Designation Profile Report**

1) * Unit Type:	<input type="text" value="&lt;Select a Value&gt;"/>	2) Unit Selection:	<input type="text"/>
3) Include Closed Funds:	<input type="text" value="No"/>	4) Unit Selection Text Entry:	<input type="text"/> <input type="checkbox"/> NULL
5) Status:	<input type="text" value="Current Use, Endowment, Pend"/>	6) Purpose:	<input type="text" value="Faculty-Staff Compensation, Fa"/>
7) Fund Start Date From:	<input type="text"/> <input type="checkbox"/> NULL	8) Fund Start Date To:	<input type="text"/> <input type="checkbox"/> NULL
9) Fund Name Search:	<input type="text"/> <input checked="" type="checkbox"/> NULL	10) Return Only iGive Funds:	<input type="text" value="No"/>
11) Suppress Multiple Lines (Splits):	<input type="text" value="Yes"/>	12) Activity Comment Fiscal Year:	<input type="text"/>
13) Activity Type:	<input type="text" value="Reporting Comment"/>	14) Column Groups:	<input type="text" value="Fund Profile, Development Acti"/>

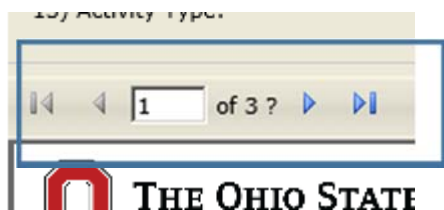
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Simple Report outputs are designed to be exported as either an Excel/csv file or as a pdf using the export button.




The output itself will consist of a cover page and then the data / report itself. They can be viewed within your browser window with you clicking the page advance buttons to move from page to page in the report.



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### Report Header page

**THE OHIO STATE UNIVERSITY**

### Designation Profile

Run Date: 12/31/2014 10:14:36 AM  
Data Date: 12/28/2014  
Row Count: 59

**Parameters:**

1	Unit Type:	CDO
2, 4	Unit Selection:	Alumni Association
3	Include Closed Funds:	No
5	Status:	All
6	Display:	All

### Report data page

ID	Name	Description	Public Name	Reporting Desc	VPDean
32958 5	Gifts To Alumni Association - 125555	To Record Gifts Given to The Alumni Association	The OSU Alumni Association Gift Account	To Record Gifts Given to The Alumni Association	UNIV_ADVANCEME
32022 8	ASH Anniversary Scholarship - 200228	Provides scholarships to students in the ASH Program. In the event the ASH Program ceases to exist, the scholarships shall be given to candidates with a GPA similar to that required by the ASH Program who demonstrate high character and financial need.	The Alumnae Scholarship House (ASH) Anniversary Scholarship Fund		UNIV_ADVANCEME
32329 8	Hosford Memorial Fund - 203298	Income and Principal, if Needed, Support The Alumnae Scholarship Houses including Purchases of Real Property	Helen H. Hosford Memorial Fund		UNIV_ADVANCEME
20416	Dorothy E. Lewis Memorial Fund - 204163	Used for Purchase of Books, Periodicals, Concert Tickets, and other means of furthering the Cultural Advancement of	Dorothy Evans Lewis Memorial Fund		UNIV_ADVANCEME

### Custom Unit Reports

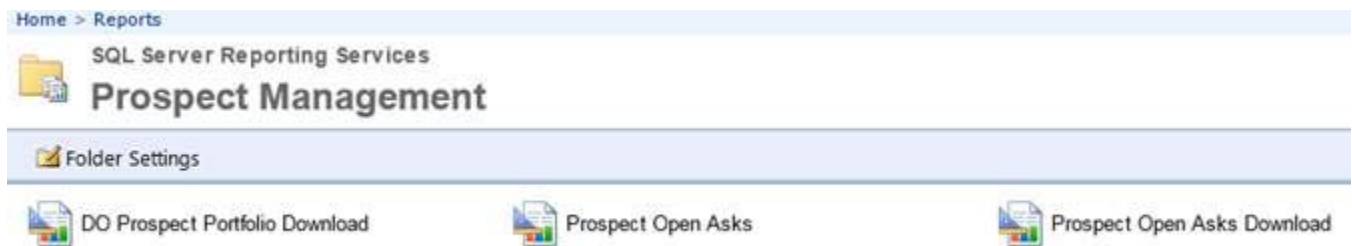
- Custom Unit Reports are self-service reports built by the Reporting and Analytics team for the unit in question.
- As each report was designed at the request of a unit little to no training materials are provided with the report, rather the training is provided when the report is delivered to the unit.
- They do assume a general level of advancement understanding and TAS familiarity so access is granted only after completing the TAS Navigation and Constituent View or Fund View training classes.

By clicking the Custom Unit Reports link, you will see a list of all the units under which a custom report may exist. Clicking the unit name will then take you to the unit's report directory in either a new browser session or tab.

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Clicking on a link will take you to that Unit's listing of custom designed reports.



Clicking on the report name will then open the report proper.

### Additional Log-in Requirements

Access to the Custom Unit Report Directory may require an additional log-in depending on which local security network you come from. If that is your case you will first see a log-in screen like the following:



For user name enter the domain of island a back slash and then your TAS user name.

Example: island\plummer.2

You may need to select the Use another account option if you are unable to change your username.

Then enter username as Island\plummer.2

Then enter your **TAS password**.



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Next click OK and you will be taken to the unit report directory selected.

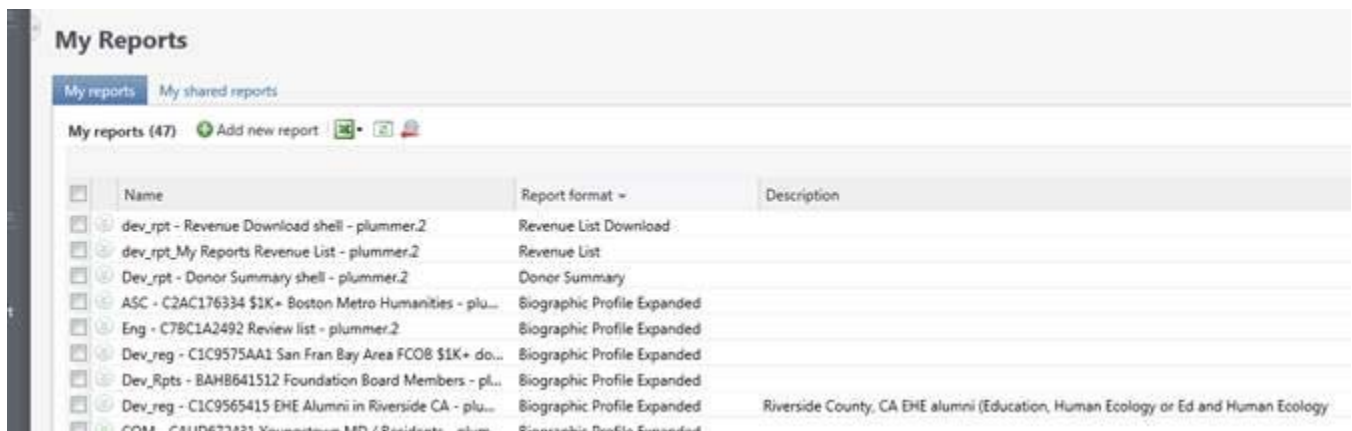
This log-in will be required once per browser session. You will not need to log-in again until you close the current browser session

### My Reports

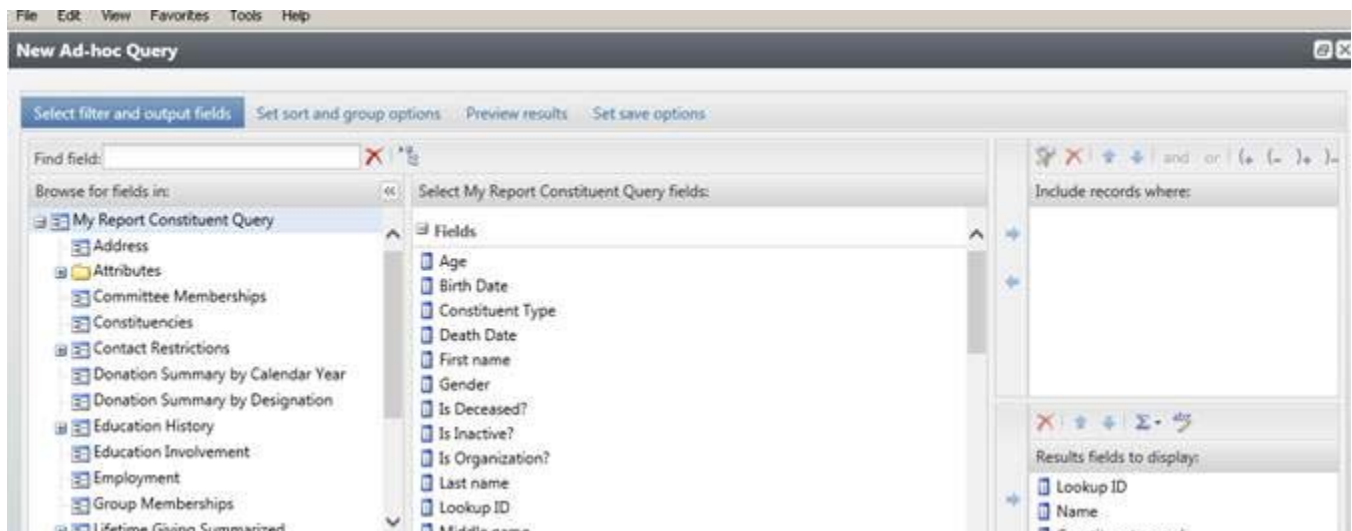
My Reports combines a graphical query tool with a number of standard output choices. It requires intermediate query skills and a decent amount of introductory training before independent use is appropriate. Both entry level and tool specific trainings are required before access is granted. More information will be found from those trainings.

NOTE: My Reports is gradually being replaced by the Simple Reports tools discussed below.

Intro Screen:



Query screen:



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Output Screen:

The screenshot displays the TAS Self-Service Reporting interface. On the left is a sidebar with navigation links: Home, Constituents, Marketing and Communications, Revenue, Events, Memberships, Properties, Volunteers, Fundraising, Analysis, and Administration. Below these are sections for 'Recent searches' (Constituent search, Fund View Search, Campaign hierarchy search, Purpose search, Transaction search) and 'Recently accessed' (Mr. Douglas Andrew Plummer, 5/7/2007 Payment: \$15,000.00 - Morgan Stanley Smith Barney - Gary & Carolyn Koch Char Fund, 12/26/1995 Planned gift: \$1,962,186.67 - Dr. Gary Greene Koch, Dr. John David Smith). The main content area is titled 'Revenue Listing Download Report'. It includes input fields for 'Report Title' (Revenue Listing Download Report), 'Report Subtitle', and 'Report Selection' (Revenue Download shell). A 'View report' button is located to the right. Below the input fields is a table with the following columns: ID, First Name, Middle, Key Name, Deceased Flag, Constituent Type, Current City, State, Post Code, Current Country, Date, Post Date, Amount, Desig ID, Designation, Dept Org, Department Org, and Hor. The table contains two rows of data for Doug Plummer, both dated 12/31/2014, with an amount of \$25.00, associated with 'The Boger Fencing Team Championship Fund' and 'Athletics' department.

ID	First Name	Middle	Key Name	Deceased Flag	Constituent Type	Current City	State	Post Code	Current Country	Date	Post Date	Amount	Desig ID	Designation	Dept Org	Department Org	Hor
00564863	Douglas	Andrew	Plummer		Individual	Hilliard	OH	43026-7910	United States	12/31/2014	12/31/2014	\$25.00	640010	The Boger Fencing Team Championship Fund	54140	Athletics	054
00564863	Douglas	Andrew	Plummer		Individual	Hilliard	OH	43026-7910	United States	11/28/2014	11/28/2014	\$25.00	640010	The Boger Fencing Team Championship Fund	54140	Athletics	054

### Query

Query is an additional, limited access tool that enables advance querying of TAS. It requires advanced query skills and a significant training investment before independent use is appropriate. In general access to Query is not appropriate. If you think your position warrants access please contact Doug Plummer ([plummer.2@osu.edu](mailto:plummer.2@osu.edu) / 614-247-7097).

If you find your needs cannot be met by these tools, or you have questions in general, please submit a ticket to the helpdesk ([2-tech@osu.edu](mailto:2-tech@osu.edu)) and your request will be submitted to the Reporting and Analytics team. You will find a report request form on the Reporting and Analytics page of the Advancement Intranet as well

(<https://advancementintranet.osu.edu/ReportingAnalysis/Documents/Report%20Request%20Form.docx>) that can be included with your email to the helpdesk. Or you may contact Doug Plummer, Director Reporting and Analytics, at [plummer.2@osu.edu](mailto:plummer.2@osu.edu) / 614-247-7097 or Don Callahan, Associate Director Reporting and Analytics, at [Callahan.254@osu.edu](mailto:Callahan.254@osu.edu) / 614-292-6058.