

DevMan's report and analytics platform provide every day reports and more so you gain insight to help solve your business questions.

- Select data sets you want to see using simple or advanced filters
- Decide how you want it presented and select the data fields you want to include
- Bulk communicate from the search results
- Publish dynamic reports for easy access
- Harness the power of Excel for advanced reporting



Key components and steps

STEP 1: Determine your starting point based on the data you need

- People - Entity reports (People and organisations)
- Finance - Monetary reports
- Initiatives/Development - Projects, bursaries, approaches &c

STEP 2: Search methods

- Simple search when data is from a single source
- Advanced search for complex multi source filtering
- Saved filters for you to reuse and share with your team

STEP 3: Preview and action

- View detail on-screen
- View dashboard summaries and graphs
- Send bulk communication
- Bulk generate print documents
- Generate pre-defined reports

Additional Features:

- Custom exportable views to suit your needs
- Statistics from key fields to build pivot tables, charts etc.
- Shared reports
- Excel integrated reports

The following pages describe how to use these components.

Simple search

The basic search is available for most DevMan functions and provides a search option for single data types (e.g. contacts or finance).

- Step 1:** Select the applicable starting point then select: **Search**
- Step 2:** Add your search criteria to the relevant fields, then again select: **Search**
The number of results found will show in blue text at the top of the search page
- Step 3:** See separate headings on various methods to view and use data.

Tip

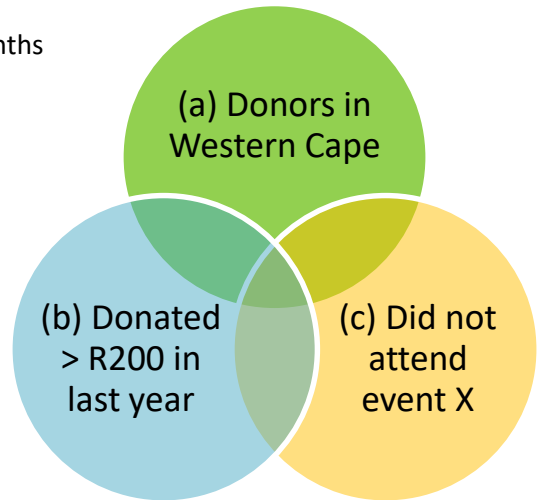
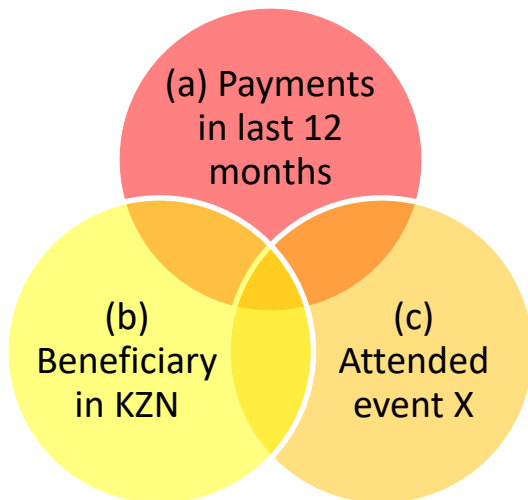
Search results will reflect the full number of matching records, however viewing and reporting on the data is restricted to 1000 records. To draw a full report with all data use the Advanced search.

Advanced search

This more powerful search tool is also available for most DevMan functions and helps you build reports by adding criteria from multiple data types.

For example, you may require:

- a) A list of donors in the Western Cape
- b) Who have donated more than R200 in the last 12 months
- c) And who did not attend your last event.



OR

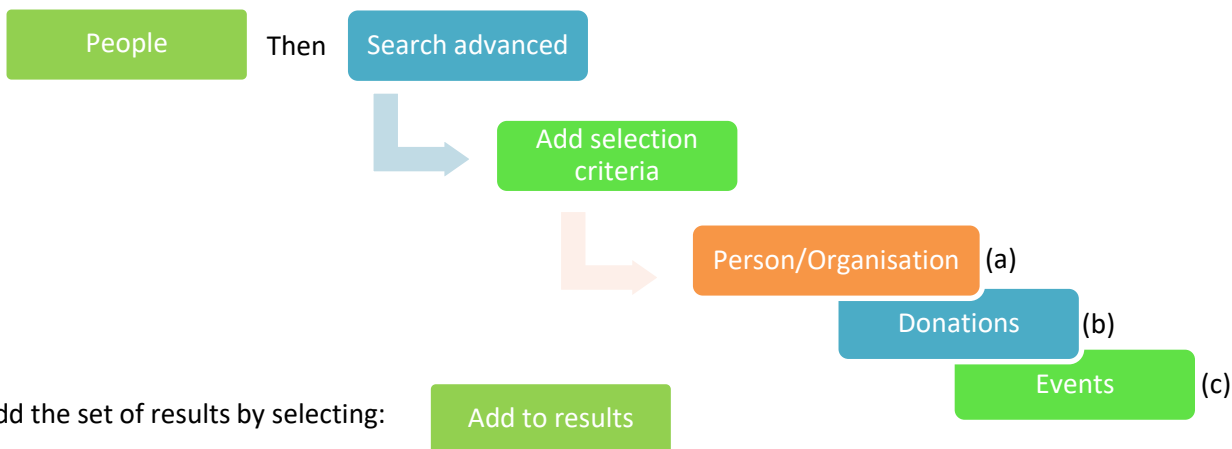
- a) A list of payments in last 12 months
- b) To beneficiaries in Kwa-Zulu Natal
- c) Who attended your last event

These are the steps to execute the search for the first example:

Step 1: Determine your starting point – for this example we start at People.

Then select **Search advanced**

Step 2: Add the search criteria per data type – based on the example we need to add 3 search levels.



Repeat from the **'Add selection criteria'** to add financial (b) and then event (c) filters to build the full report: The combined results will be a cross section of all the search criteria added.

Step 3: See separate headings on various methods to view and use data.

Tips

- The first set of search criteria should be the broadest set.
- Add a description for each set of criteria in the 'Criteria description' field on the search page

Preview and action

To view results after executing a search, select:

View

Other options available from the search results or the view screen include:

- | | |
|--------------------|---------------|
| • Send email / SMS | • Export |
| • Dashboards | • Statistics |
| • Report | • Bulk print |
| • Send to Excel | • Bulk update |

Tips

Grids are interactive, such as:

- Click through to view a record
- Export the grid to excel
- Select the grid header to sort the column
- Filter the grid – use the filter icon options
- Select the check box to action specific records

Dashboards are dynamic, such as

- Change the data view using the display suite
- Change the data set using the reporter or saved searches
- Click through to see more detail

Pre-defined reports

There are many commonly required report layouts provided as part of the base application - including event name tags, address labels, lists, summaries with text and graphs. Report on all items in the grid, or select specific items by using the check box , then select:

Report

Choose from several pre-defined report options - options available will depend on the DevMan function being used.

Lists – data presented in columns

- Layout – Pre-defined lists
- Display by – sort order options
- Report title – preferred heading

Statistical – high level summaries and graphs

- Displayed by – sort order options up to 3 levels
- Report title – preferred heading
- View options – textual data, pie/bar graph

Then select:

Print preview



Word/Adobe/
Excel/HTML

Follow the prompts to download.

Re-useable searches

Save searches for repeated use by you and other DevMan users on your team. No need to repeat the search even if the data has changed.

Execute a search using the advanced search, once you have added the criteria:

- Add a name for the selection in the **My selection** field.
- To share your saved selection tick the 'Make public' option
- Select save & stay on page

My selection	Western Cape bursary holders	<input type="checkbox"/> Make public						
Criteria description								
Search results	<table border="1"> <tr> <td>Person / Organisation</td> <td>840</td> </tr> <tr> <td>Bursary</td> <td>1 370</td> </tr> <tr> <td>Combined results</td> <td>186</td> </tr> </table>		Person / Organisation	840	Bursary	1 370	Combined results	186
Person / Organisation	840							
Bursary	1 370							
Combined results	186							

Saved searched can be accessed from:

- The drop down field in the 'My selection' of the advanced search page
- Project / Bursary view page if saved from the Initiative / Development tab
- Dashboards

Custom exporter

Export all or any set of selected data from DevMan into an Excel sheet.

Complete your data search, then select:

Export

Under the available fields selection:

- Tick the fields required.
- Click the + box to expand the tree for more data options.
- Use the left chevron (<<) to add fields to your selection.
- Click and drag to order your selected fields.

See further headings in this guide on how to download, view and use the generated report.

Statistics reporter

The statistics report extracts counts of key fields to build statistical reports.

Complete your data search, then select:

Statistics

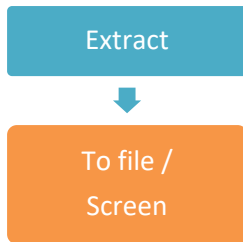
When on the report page, select up to three 'Displayed by*' options.

See further headings in this guide on how to download, view and use the generated report.

*Displayed by: to put something in a specific order.

Extract exporter and statistics data

Once you have selected your export / statistics fields the data can be extracted. To do this, select:



To download a generated file select the 'Download' option. A pop up window will list all generated files, select the file name to download.

If viewed on screen the grid can be exported to Excel by selecting 'Send to Excel'.

Re-useable export / statistics selections

This feature lets you save field selections for quick re-use. After you've made your selection:

- Add a name for it in the My selection field
- To share it with others tick the 'Make public' option
- Select save & stay on page

The next time you need an updated report with the same field options simply chose from the list of saved selections.

Shared reports

Combine saved searches with a saved exporter or statistics selection to publish a frequently used report. Published reports update dynamically as information is added to DevMan and are easily accessible to all users.

The steps to create a published report are as follows:

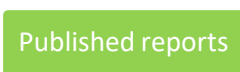
1. Create a saved search using the advanced reporter, then go to Export or Statistics
2. Create a saved Export or Statistics selection and then select:



3. Save and stay on page.

Extract to screen or file as per the heading 'Extract exporter and statistics data'.
For more information on extracting to link see the heading 'Excel integrated reports'.

To access the published reports go to the relative tab (People, Organisations, Development / Initiatives, Communication or Finance) and select:



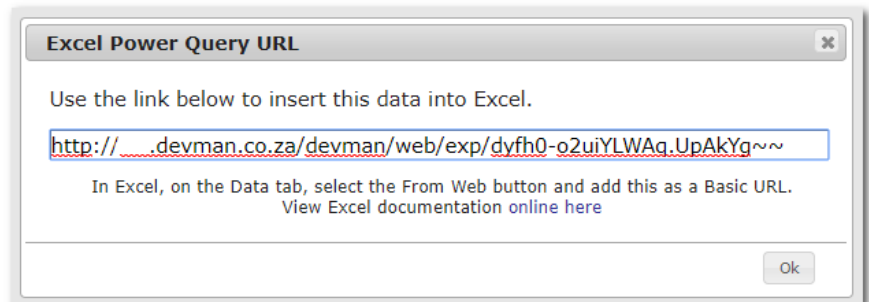
Excel integrated reports (EIR)

Link or bind data from DevMan directly into MS-Excel and use the many features of this popular analytic tool with built-in pivot tables to create reports and save them to be reused.

Reflect changed filters or latest information, directly in Excel by a simple data refresh.

The steps to create an Excel integrated report are as follows:

1. Create a saved search using the advanced reporter, then go to Export or Statistics
2. Create a saved Export or Statistics selection and then select 'Publish'
3. Save the published report, then select:



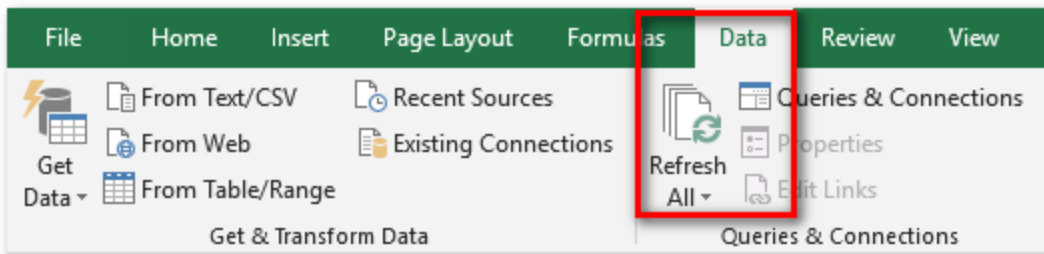
4. Add the link to an Excel spreadsheet

Copy the link provided and follow instructions as per the pop up – *'In Excel, on the data tab, select the From web button and add this as a basic URL'*

Create your pivot table and/or other report styles with the data sourced from DevMan (for Excel help follow the link provided in the pop up).

Refresh the report

When you next require an updated report simply refresh the data in the spreadsheet by selecting the Data tab and select 'Refresh all'. The data will automatically update from DevMan. (you might need to refresh your Excel generated charts as well.)



Example

Refresh report only to reflect added data

- You require a monthly report showing all payments / donations made for the year to date.
- The criteria used to create the saved report would specify the start and end dates, i.e 01/01/2018 to 31/12/2018.
- Once the first Excel report has been created and saved, it can be refreshed the following month – the report will automatically update to reflect the latest payments / donations received.

Change search criteria and refresh report to reflect changed criteria

- You require a monthly report showing all payments / donations made for January.
- The criteria used to create the saved report would specify the start and end dates, i.e 01/01/2018 to 31/01/2018.
- The following month the start and end dates of the saved report on DevMan needs to be updated to 01/02/2018 to 28/02/2018.
- The saved Excel report can then simply be resaved as the February report and refreshed to reflect the February data.

FAQ

Following are some frequently asked questions:

- | | |
|---|------------------------|
| • Can I edit a saved search? | Yes |
| • Can I copy and re-save a saved search? | Yes |
| • Are my saved searches private? | Yes |
| • Can I share my saved searches? | Yes |
| • Can others edit my saved search criteria? | Yes |
| • Can others edit my saved exporter or statistics fields? | No |
| • Can I delete saved searches, exports, statistics and published reports? | Yes, if created by you |
| • Can I get the URL if I lose it? | Yes |
| • Can I access previously generated files for download? | Yes |
| • Why do I get an error when I refresh my EIR report? | Contact support |

Please contact our support team for training and assistance on these steps.