INJOY Financial Data Reporting from RockRMS

This document assumes that you have created data views and reports in RockRMS. If you've never done this before, you might want to take a moment to check the documentation or watch the training videos.

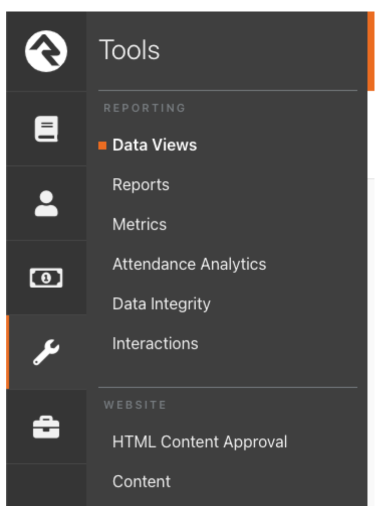
This document will walk you through the creation of an INJOY yearly income report:

1. Build Your Folders
2. Build Your First Data View
3. Build Your First Report
4. Duplicating Reports

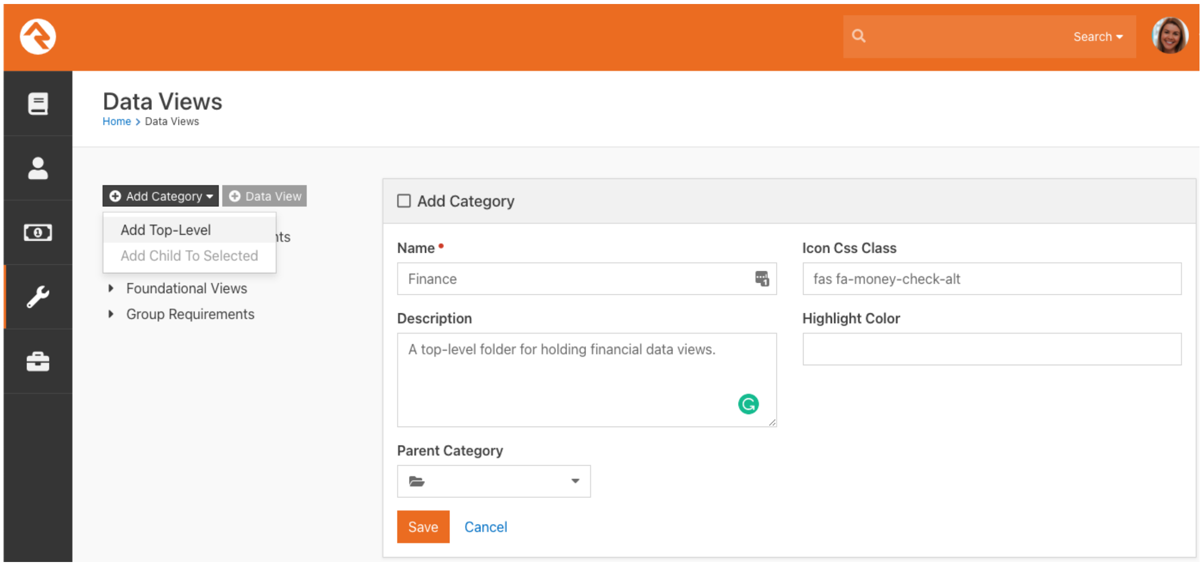
Part 1: Build Your Folders

Our first step is to create folders to hold our new Data Views and Reports. This isn't just about tidiness: we're going to secure these folders so that only people with the correct levels of access can view their contents. You probably don't want everyone with database access to see the entire church's financials!

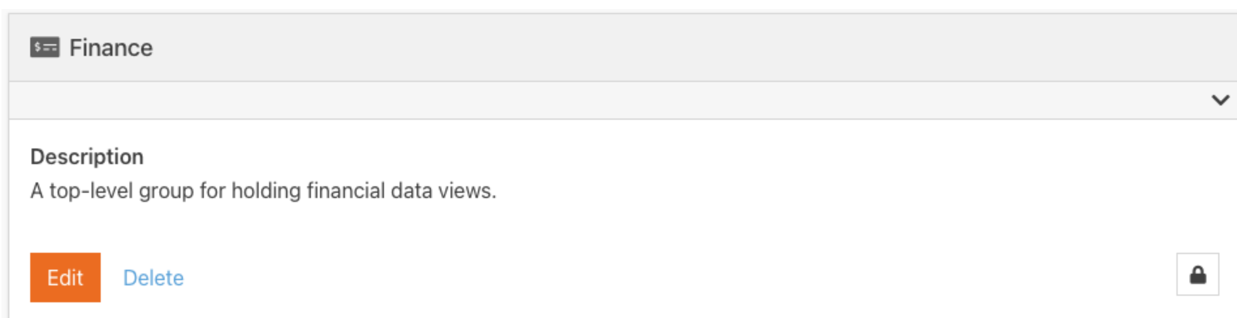
1. First, navigate to the Data Views area:



2. Next we'll create a top-level folder. You can call this whatever you like; we'll use "Finance" for this illustration. Don't leave out the description, and for extra credit feel free to drop in a FontAwesome icon to set it apart. We'll be using *fas fa-money-check-alt*.

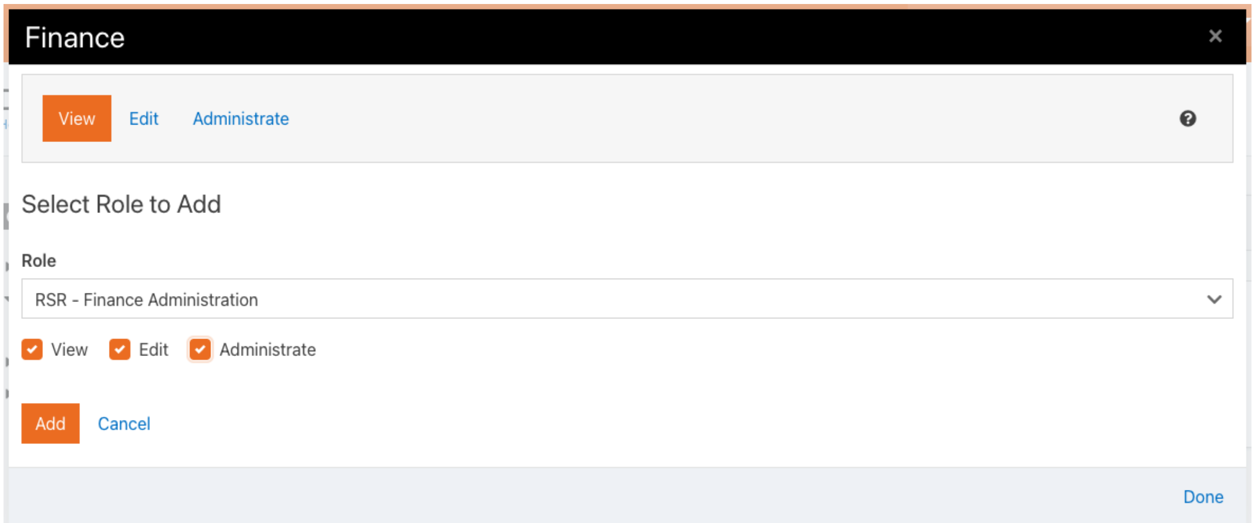


3. Next, select your new category and click the "Lock" icon at the bottom right.

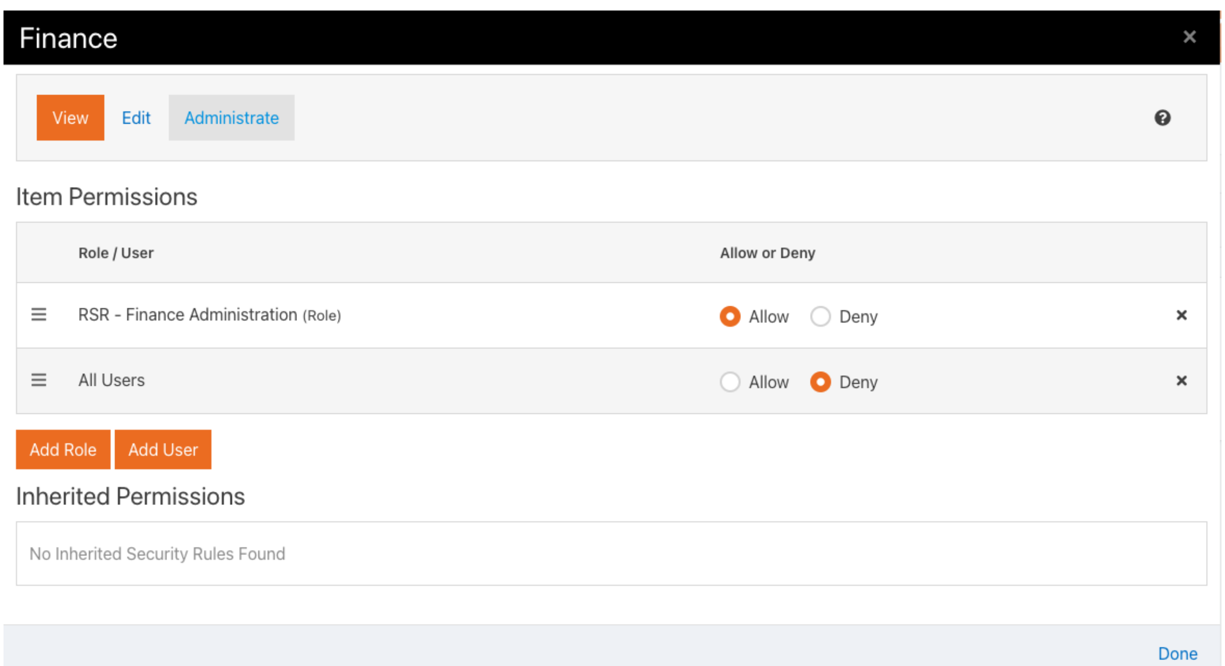


4. This will let you control Permissions for this folder. Click "Add Role."

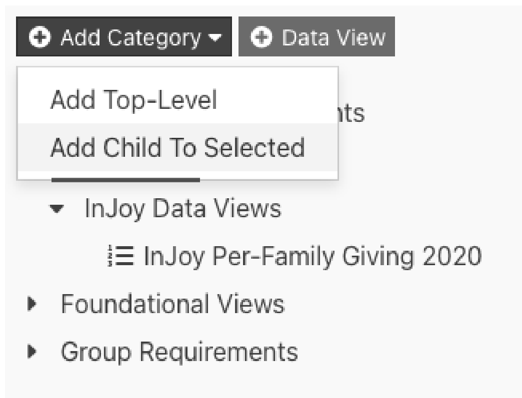
5. Finally, let's add a security role to this category. You'll need it to be a security role you have access to! *RSR - Financial Administration* seems like a good choice. Select one and click "Add." More information on security roles [can be found here](#).



6. Now we've said who can see the category, but we haven't said who can't. In this case, it's going to be everyone who's not in the Finance Administration security group. Add another role, except this time choose *All Users*. Select View, Edit, and Administrate and click "Add." Set the "Allow or Deny" selection to "Deny," then click the "Edit" and "Administrate" tabs to do the same thing there. Click "Done" to save, and you're finished!



7. One last step: create a sub-folder of Finance called "INJOY Data Views." This is simple. Select the Finance category from the tree on the left, and click the ***+Add Category*** button. Click "Add Child to Selected" and type "INJOY Data Views" in the name. We won't add any new security to this folder; we'll just piggyback on the security from the parent category.

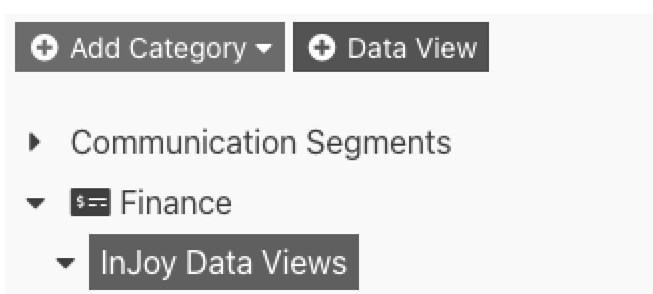


8. You now have a secured category for your data views. Now navigate to the "Reports" page and repeat steps 1-7 to build a secured category for your reports. Don't neglect these steps! They take you a few extra minutes, but will save you a lot of time and trouble in the long run.

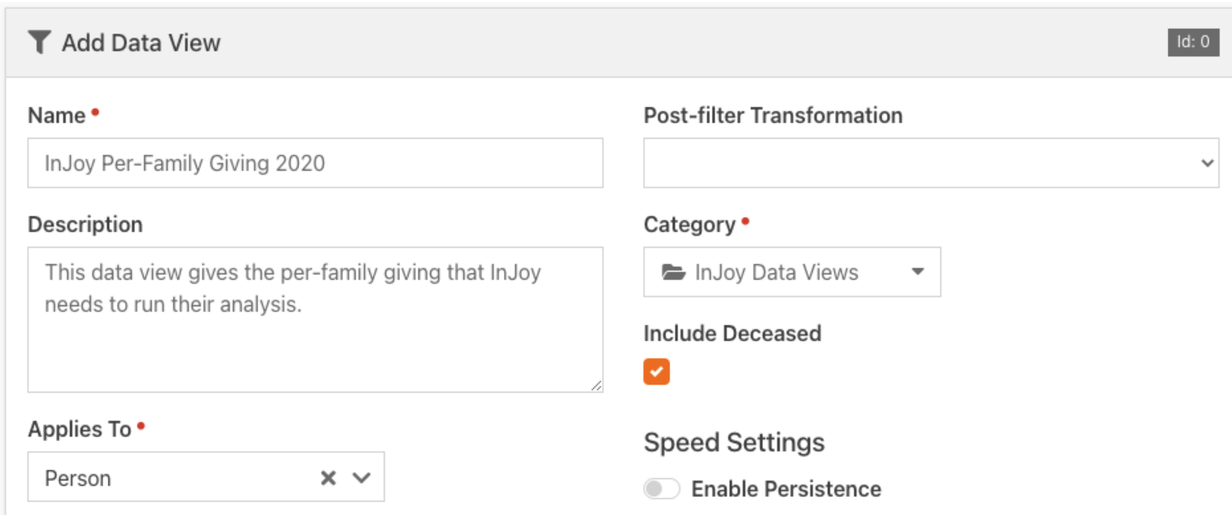
Part 2: Build Your Data View

Now for the main event! First we'll build a Data View to show everyone who gave in a year (2020 in our example), then in Step 3 we'll build a report to show how much they gave.

1. Navigate back to the Data Views page, and choose your **INJOY Data Views** subcategory. Hit the +Data View button to start your data view.

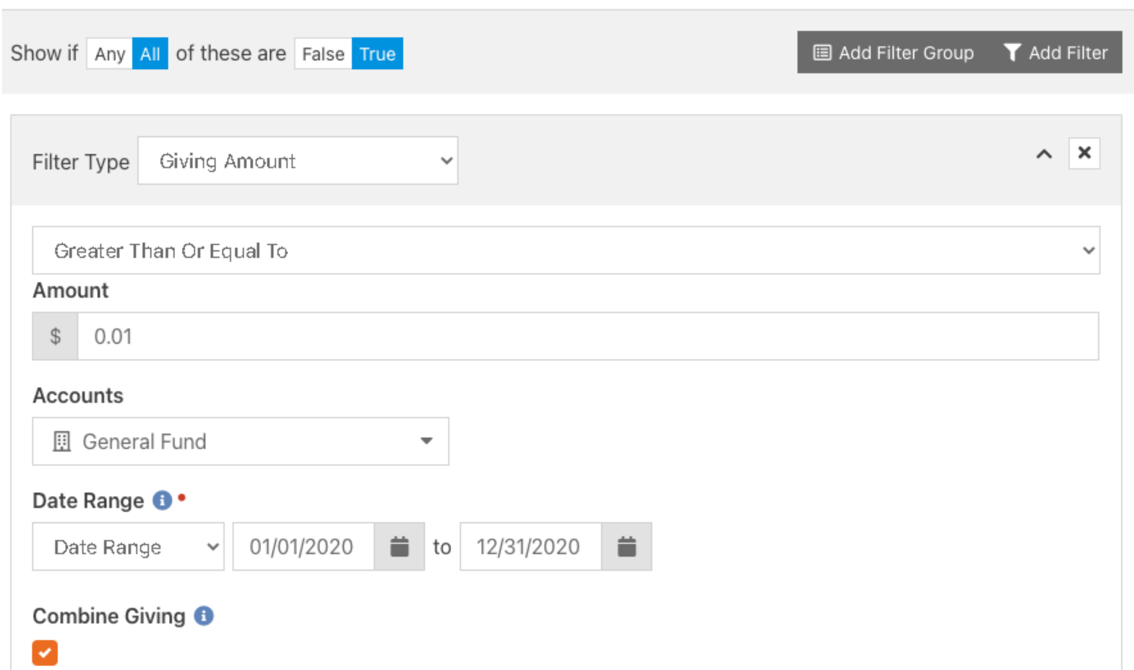


2. Now we simply fill in the information on the Data View.



   a. Give appropriate Name and Description (Don't skimp here!)
   b. Applies To: **Person**
   c. Include Deceased: **Yes**

3. Now we'll build a filter for the data view, so we get the list of people we want.

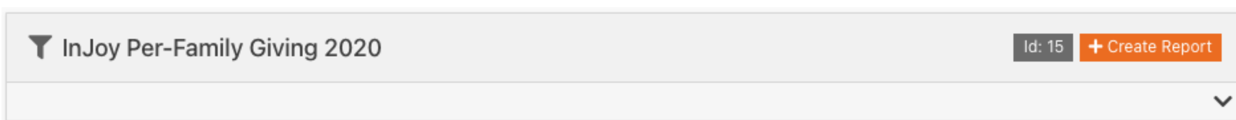


a. Filter Type: **Giving Amount** (start typing in the blank box to quickly find your preferred filter.
b. Greater than or Equal To: **$0.01**
c. Accounts: Use the relevant accounts for your church. If you have questions, talk to your INJOY Representative.
d. Data Range: **1/1/2020** to **12/31/2020**. (Or whatever date you want data for).

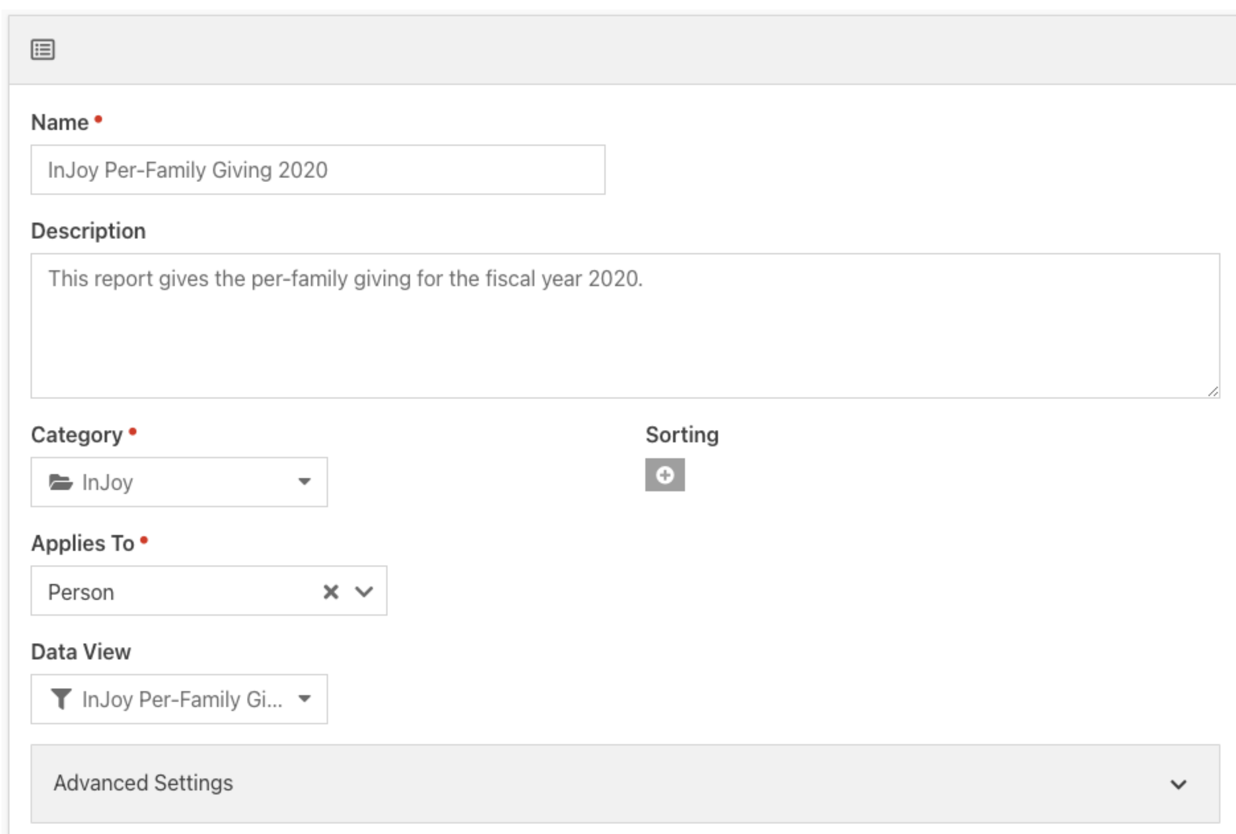
4. Save your new Data View and you're done!

Part 3: Build Your Report

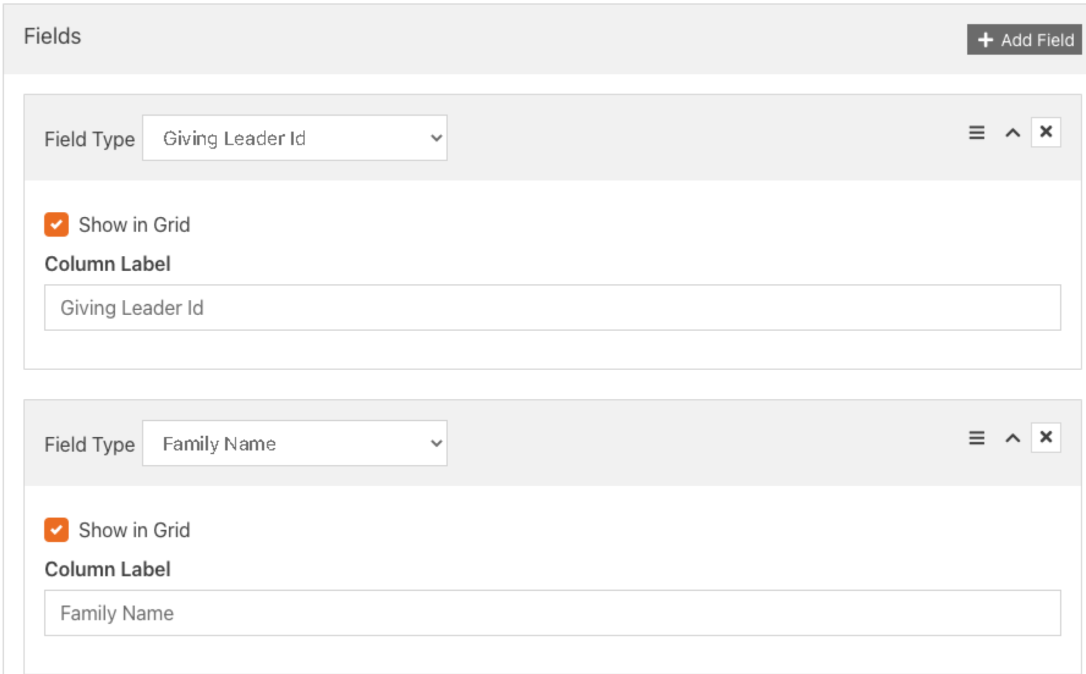
1. "Create Report" button at the top right of Data View



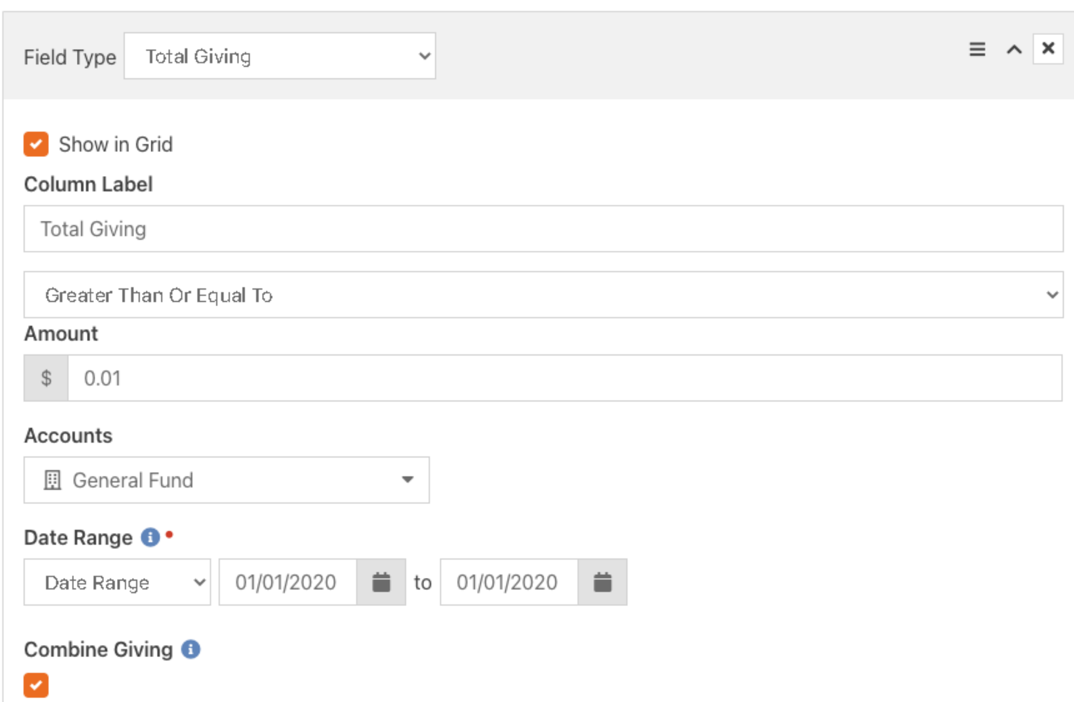
2. The basic data for your new report will be simple. Make sure to put the new report in your protected "INJOY"category! All of the "Advanced Settings" can be left blank.



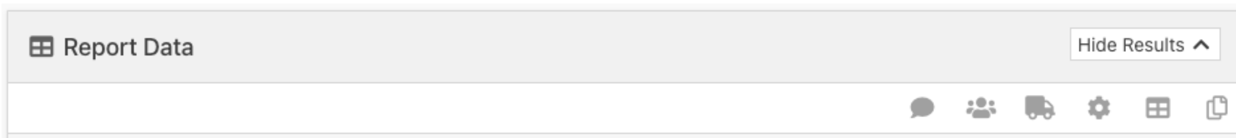
3. Now we simply need to choose what values will be in the columns. Click **+Add Field** twice and add choose “Giving Leader ID” and “Family Name” for the first two columns.

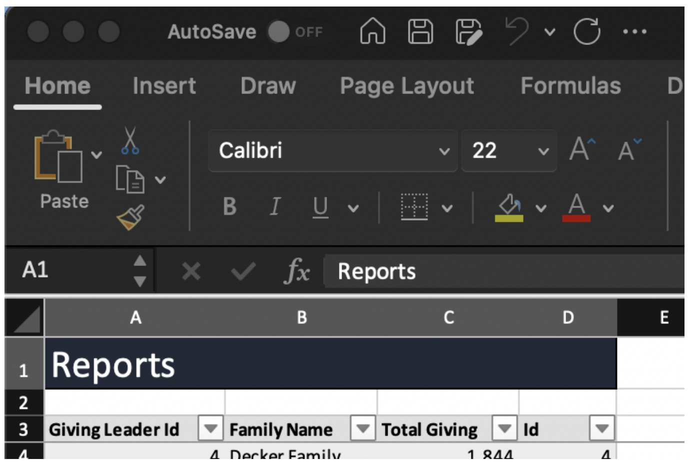


4. For the third column, choose “Total Giving” and fill in the same values that you did for the corresponding data view in Part 2, Step 3.



5. Your report is done! Click “Save” and give the completed report data a once-over to make sure it looks right. Now we need to export it to Excel. Use the Export button at the top right of your window (the grid icon between the gears and the two pieces of paper). Open the resulting file in Excel.





6. Delete the first two rows, then put the cursor in A1 and select “Remove Duplicates” from the Data menu (exact location may vary depending on your version of Excel). Unselect “Select All,” then check the box marked “Giving Leader ID” and click “Ok.”

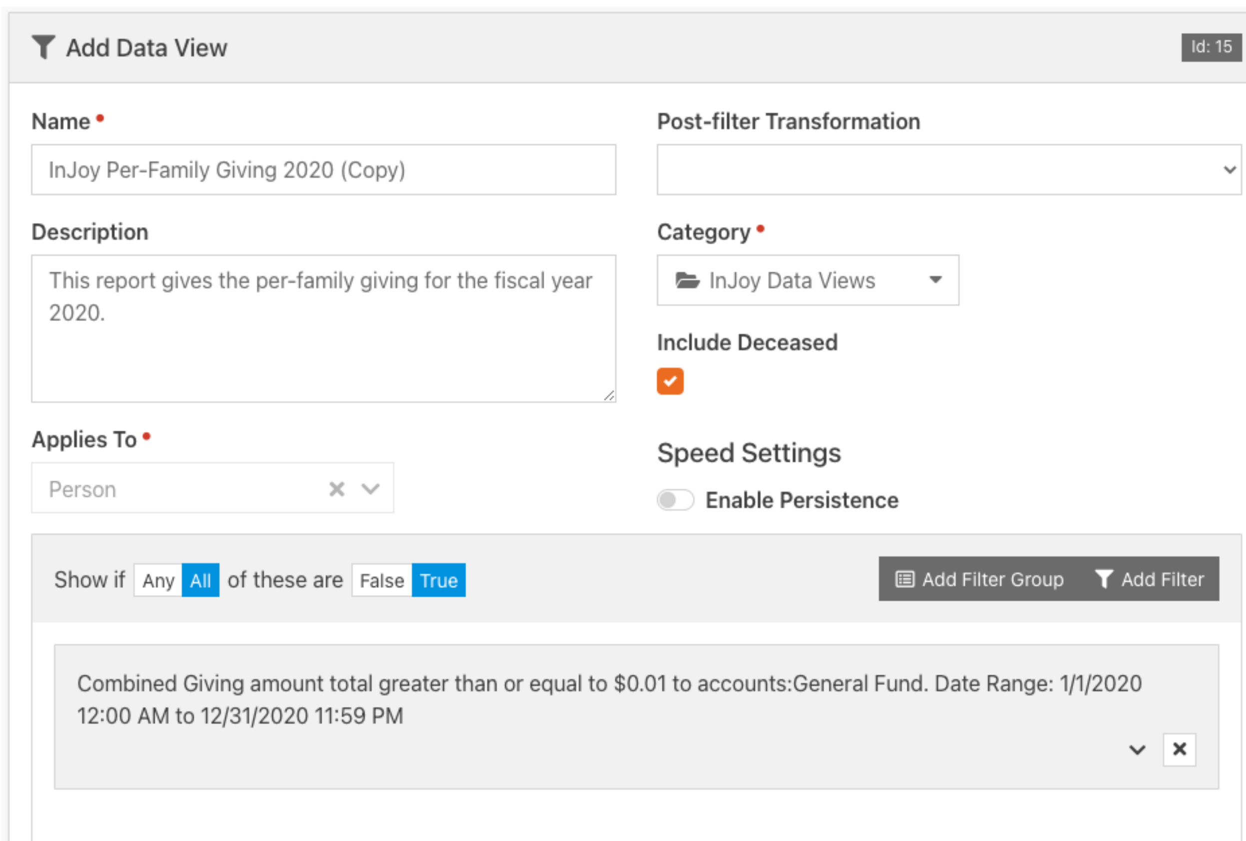
That’s it! You’ve successfully created and exported your data for INJOY!

Part 4: Duplicating Reports

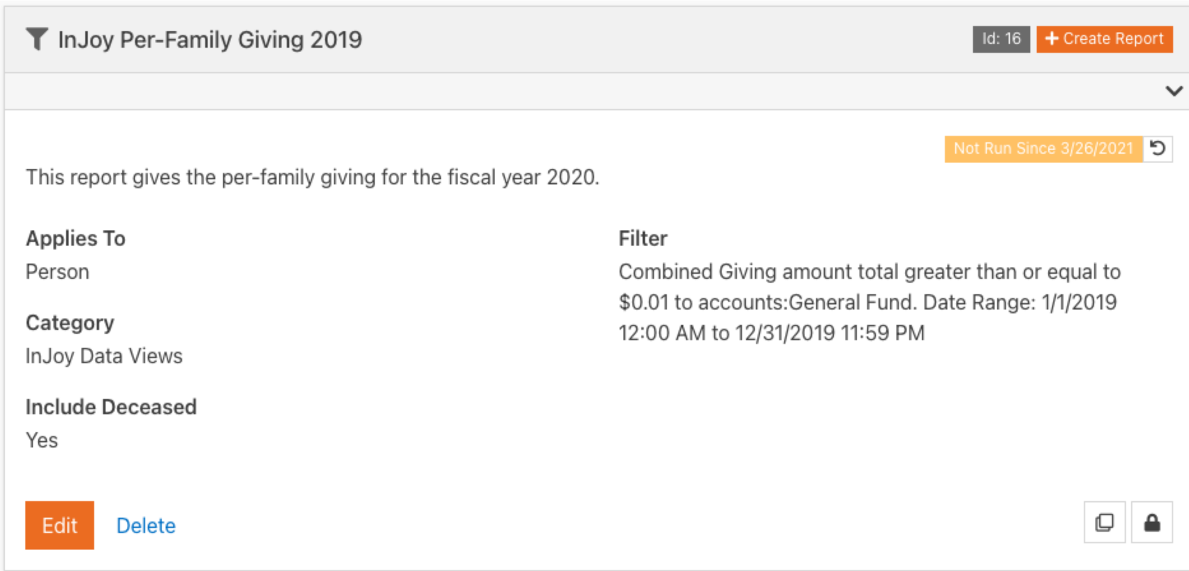
It's likely that you'll need to pull multiple years of data. It is ***highly*** recommended (did we mention that this is highly recommended?) that you not try to keep editing the same data view and report combo, but to create a new data view and report for each year.

Seriously, we're not kidding. Creating a new report will save you headaches untold.

1. Navigate back to your Data View menu and choose the appropriate data view. In the bottom right corner (by the lock) you'll see a "Duplicate" button (it looks like two sheets of paper on top of each other).

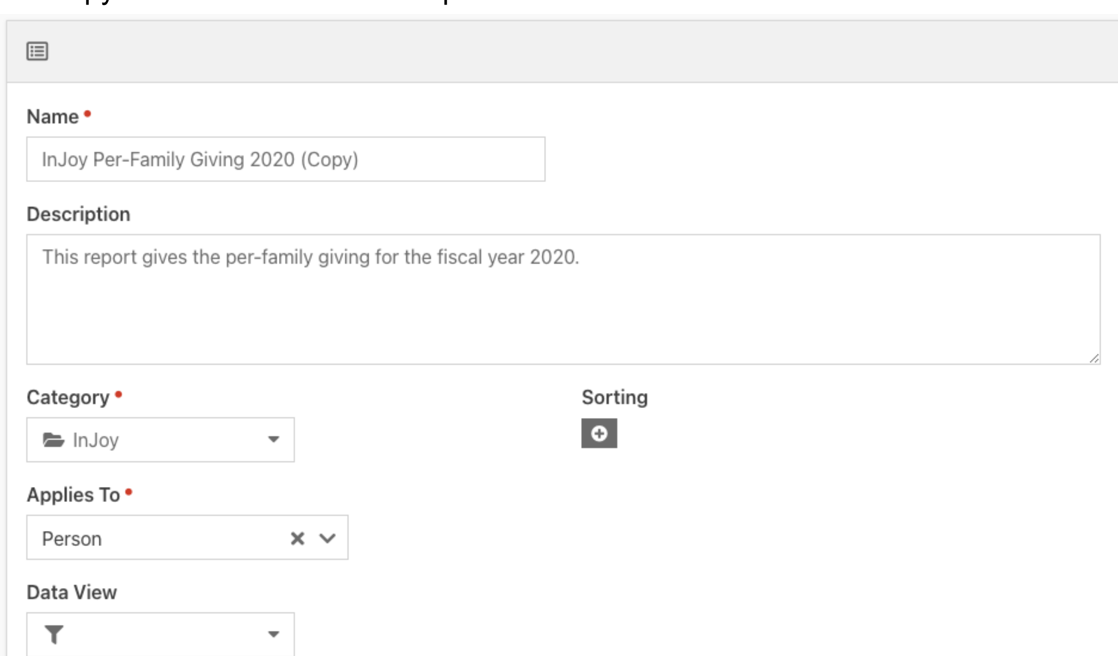


2. You'll need to change the dates in three places: In the **Name** field, in the **Description** field and in the date range filter. Once you're done, hit Save.

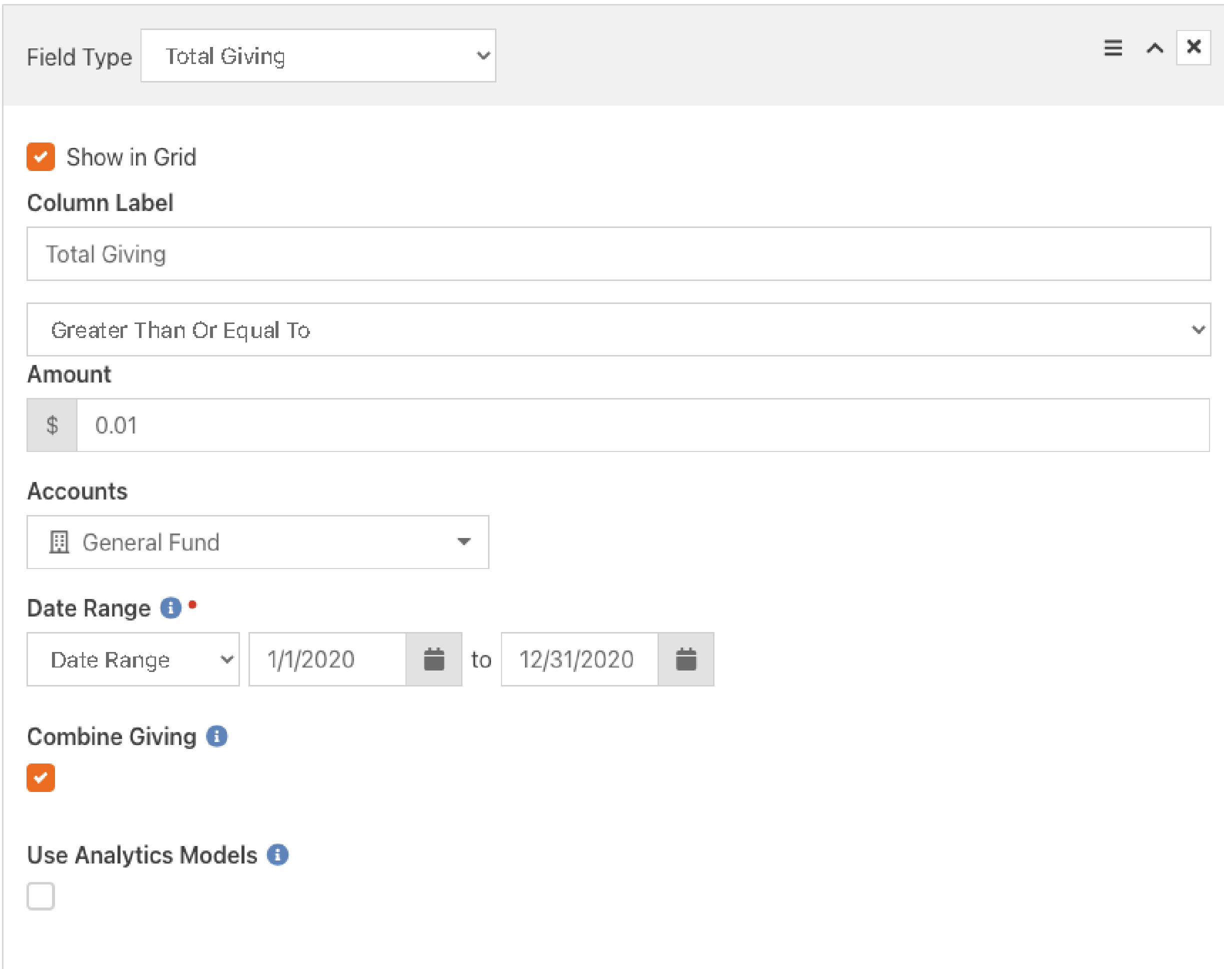


3. Repeat these steps for every year for which you need data.

4. Now we could click the ***+Create Report*** button at the top right and follow the steps in Part 2. But it will be faster to clone the reports in the same way that we cloned the data views. Navigate to your Reports tab and choose your original INJOY Report. Choose the "Copy" button like we did in Step 1.



5. Now you'll need to change the year in the **Name** and **Description** fields, then choose the appropriate data view in the **Data View** box. Then scroll down and select the "Total Giving" filter.



6. Change the date range to the appropriate year, click save, and you're done! Export this data the way you exported the previous reports in Part 3.

That's it! Email your files to your INJOY representative and let them finish the process!