

analytic Coffee! August 28th, 2020 @ 12noon EDT

Date and Time:

28 August 2020 - All items on the board
18:59 (UTC+00:00)

Facilitator:

Tessitura User Groups 2

Attendees:

Angela Lee, Jennifer Vinson, Michelle Blau, Max Dakin, Madeline, Christine, Nancy Sheleheda, Derrek, Tom Brown, Lesley Chaney, Sue Llende, Anna, Heath Wilder, Cristina Venturini

Summary:

Thanks to everyone who joined us today!

We discussed:

- "Data Products" and "Data Services"
- Favorite Dashboards for Contributions and Memberships
- External Data Sources
- Custom Categories, Ranges, and Dates
- Tips and tricks for verifying data
- Recent Wins
- Current Membership Level problems

Actions:

Learnings:

Topics discussed:

Current Membership Level -- Filters not applying, no ranking options for sorting with this. Also variances from Membership Level when current filters applied.

Votes: 5

Suggested by: Christine

Comments:

- Tessitura User Groups 2
Current Membership Level has a confusing definition: The membership level description of the constituent's current membership record. If the constituent has multiple membership records in a current status, the alphabetically last description is chosen.

Show me something that you've recently figured out!

Votes: 5

Suggested by: Madeline

Comments:

- **Tessitura User Groups 2**
I'm pulling RFM scores in from our iwave data in our first ever custom range.
- **Max Dakin**

In-formula filtering = game-changer

What are the "Data Products" and "Data Services" that you deliver to your organization. How do you talk about them to your manager and colleagues?

Votes: 5

Suggested by: Tom Brown

Comments:

Custom Categories, Ranges, and Dates

Votes: 4

Suggested by: Tessitura User Groups 2

Comments:

Tips and tricks for verifying data?

Votes: 4

Suggested by: Anna

Comments:

- **Anna**
Useful reports are "Transaction by Posting" and "Income by Payment Method"
- **Tom Brown**
Making a distinction about what dates mean on reports is important. Most reports in Tessitura report "As of" today. The transaction cube is one of the reporting mechanisms that can report as of a date in the past.

Favorite Dashboards for Contributions and Memberships

Votes: 2

Suggested by: Sue Llende

Comments:

Adding External Data Sources

Votes: 2

Suggested by: Nancy Sheleheda

Comments:

- **Tessitura User Groups 2**
iFrame widgets have been successful as long as they are publicly viewable.
- **Nancy Sheleheda**
Daniel Gomez at Arsht Center is a good resource
- **Max Dakin**
Have to choose between Analytics and other warehousing/data modeling solutions
- **Derrek**

Dexibit is a 3rd party that brings in multiple data sources and can forecast based on a large data set pulled from various other 'Museum-type' Orgs

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- **Tom Brown**

Dataiku provides Data Science Studio to do a data warehouse and machine learning modeling. If you want to know more please reach out to Tom Brown tgb417@gmail.com