



CAMPAIGN MANAGEMENT REPORTING

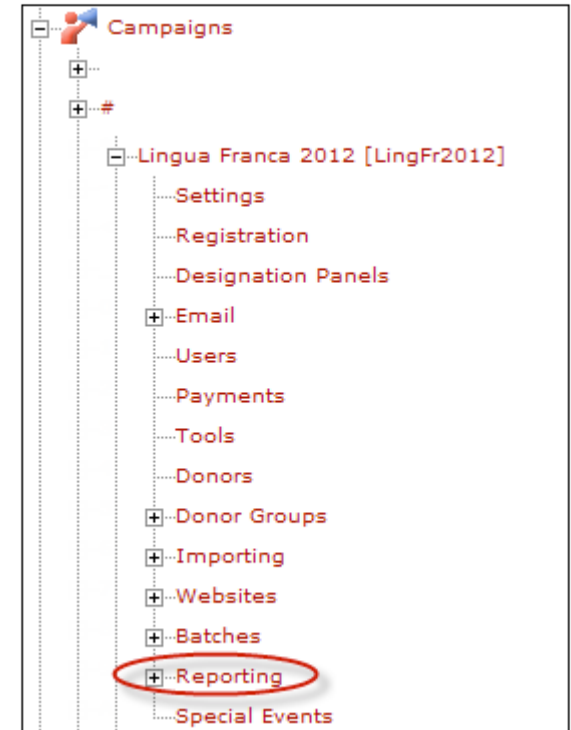
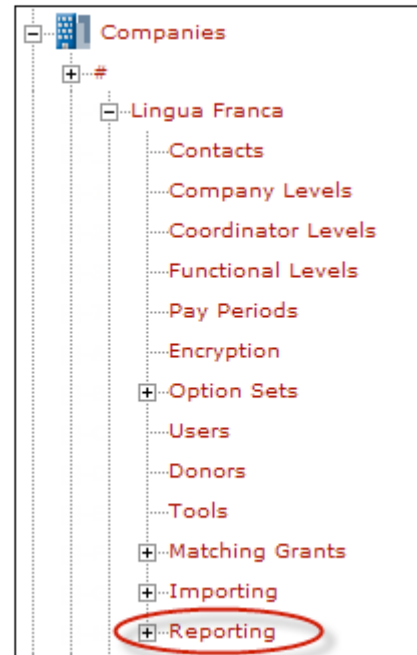
Document Version 1.0
May 11, 2011



Reporting

Reporting is designed to provide campaign coordinators with current information on the status of a campaign. The data collected from Reporting assists in monitoring the progress and administration of a campaign. Additionally, all information, except deleted or edited pledges, which are updated on a nightly basis, is updated every hour in central time.

Reporting can be found at all three levels of Campaign Management. At each level, Reporting displays the reports associated to the specific level chosen. All reports can be filtered and customized.





Summary

Report Summaries can be found at the **Organization** and **Campaign** level of Campaign Management. They are designed to provide a quick overview of the selected level's activity in the form of statistics, pie charts, and graphs. Summary reports are updated every hour, as indicated by the timestamp located at the bottom of the page. For real time reports, see the Reports section below.

Organization Level

Organization Level Summary (Truist)

Donor Quick Stats

Total Potential Donors	6,901,880
Total Respondents Goal	243,192
Total Respondents (OPCS/QPPI)	1,357,070/1,749,356
Total Donors (OPCS/QPPI)	1,027,704/1,505,219

Donation Quick Stats

Total Donation Goal	\$78,563,420.00
Total Donations	\$617,226,287.90

Payment Types

Donation Totals By Payment Type

Payroll Deduction	\$524,917,340.48
Credit Card	\$18,609,685.93
Debit Card	\$105,762.68
Electronic Check	\$6,598.85
Cash	\$7,140,078.97
Check	\$48,408,237.85
Direct Bill	\$6,509,930.69
Stock	\$11,448,641.45
No Donation	\$10.00
PayPal	\$1.00

Donation Counts By Payment Type

Payroll Deduction	2354619
Credit Card	37744
Debit Card	3373
Electronic Check	49
Cash	47304
Check	85389
Direct Bill	3138
Stock	4228
No Donation	573506
PayPal	1

Company Level

Company Level Summary (Sample Use Only)

Donor Quick Stats

Total Potential Donors	37,765
Total Respondents Goal	0
Total Respondents (OPCS/QPPI)	3,457/3,903
Total Donors (OPCS/QPPI)	2,782/3,852

Donation Quick Stats

Total Donation Goal	\$0.00
Total Donations	\$1,949,637.74

Payment Types

Donation Totals By Payment Type

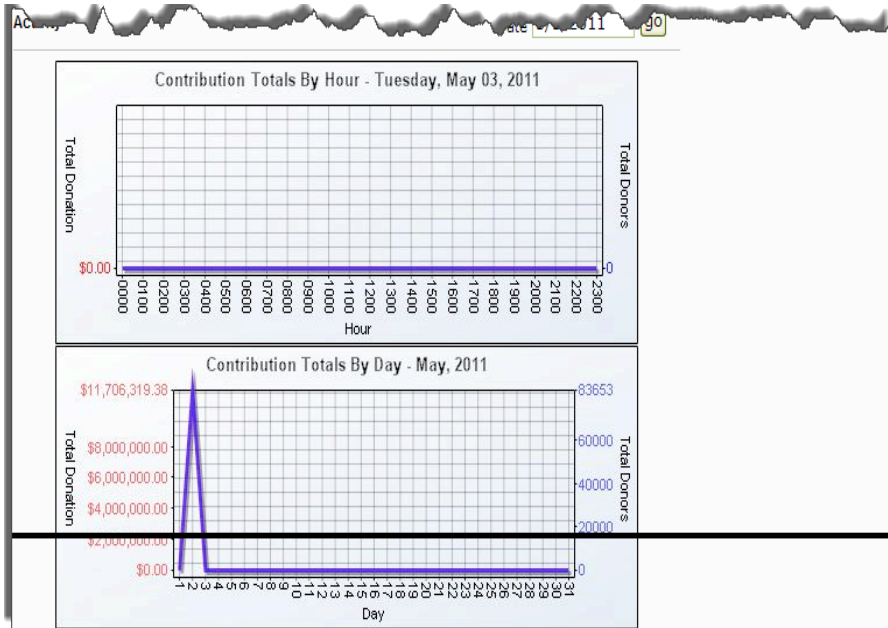
Payroll Deduction	\$1,855,958.37
Credit Card	\$30,826.00
Debit Card	\$0.00
Electronic Check	\$0.00
Cash	\$10.00
Check	\$62,843.37
Direct Bill	\$0.00
Stock	\$0.00
No Donation	\$0.00
PayPal	\$0.00

Donation Counts By Payment Type

Payroll Deduction	6283
Credit Card	159
Debit Card	0
Electronic Check	0
Cash	1
Check	191
Direct Bill	0
Stock	0
No Donation	726
PayPal	0



Organization Level



Company Level

Designations

Top Designations By Donation

Name	Org Code	Std. Acct.	Type	Donation	Count (OPCS/QPPI)
Sample Use Only					

Top Designations By Count

Name	Org Code	Std. Acct.	Type	Count (OPCS/QPPI)	Donation
Sample Use Only					

Activity

Date: 5/3/2011 go

Contribution Totals By Hour - Tuesday, May 03, 2011



Hour	Total Donation	Total Donors
0000	\$0.00	0
0100	\$0.00	0
0200	\$0.00	0
0300	\$0.00	0
0400	\$0.00	0
0500	\$0.00	0
0600	\$0.00	0
0700	\$0.00	0
0800	\$0.00	0
0900	\$0.00	0
1000	\$0.00	0
1100	\$0.00	0
1200	\$0.00	0
1300	\$0.00	0
1400	\$0.00	0
1500	\$0.00	0
1600	\$0.00	0
1700	\$0.00	0
1800	\$0.00	0
1900	\$0.00	0
2000	\$0.00	0
2100	\$0.00	0
2200	\$0.00	0
2300	\$0.00	0

Contribution Totals By Day - May, 2011

Day	Total Donation	Total Donors
1	\$0.00	0
2	\$0.00	0
3	\$0.00	0
4	\$0.00	0
5	\$0.00	0
6	\$0.00	0
7	\$0.00	0
8	\$0.00	0
9	\$0.00	0
10	\$0.00	0
11	\$0.00	0
12	\$0.00	0
13	\$0.00	0
14	\$0.00	0
15	\$0.00	0
16	\$0.00	0
17	\$0.00	0
18	\$0.00	0
19	\$0.00	0
20	\$0.00	0
21	\$0.00	0
22	\$0.00	0
23	\$0.00	0
24	\$0.00	0
25	\$0.00	0
26	\$0.00	0
27	\$0.00	0
28	\$0.00	0
29	\$0.00	0
30	\$0.00	0
31	\$0.00	0



To View Summary Reporting

Organization Level	Campaign Level
<p>Step 1: Click Reporting from the  Organizations level.</p> <div data-bbox="367 560 758 1360" style="border: 1px solid black; padding: 5px;"> <ul style="list-style-type: none"> - Truist <ul style="list-style-type: none"> Settings Merchants Contacts Territories Agencies Panel Groups Users Region + Campaign Set-Up Wizard + Designation Panels + Option Sets + Reporting Option Sets + Importing - Reporting <ul style="list-style-type: none"> Summary Reports Exports Export Series Templates </div>	<p>Step 1: Click Reporting from the  Campaigns level.</p> <div data-bbox="1310 548 1724 1312" style="border: 1px solid black; padding: 5px;"> <ul style="list-style-type: none"> - Lingua Franca 2012 [LingFr2012] <ul style="list-style-type: none"> Settings Registration Designation Panels + Email Users Payments Tools Donors + Donor Groups + Importing + Websites + Batches - Reporting <ul style="list-style-type: none"> Summary Reports Exports Export Series Special Events </div>



Organization Level

Step 2: Click **Summary**, either from the left-side navigational tree or from the top navigational tabs.

Campaign Level

Step 2: Click **Summary**, either from the left-side navigational tree or from the top navigational tabs.

Step 3: From the dropdown list, choose a campaign to view. Note there is also an option to view this summary as a PDF.

Step 3: From the dropdown list, choose a Donor Group to view. Note there is also an option to view this summary as a PDF.



Organization Level

Campaign Level

Step 4: Statistics will populate (same for both Organization and Campaign level).

Note:

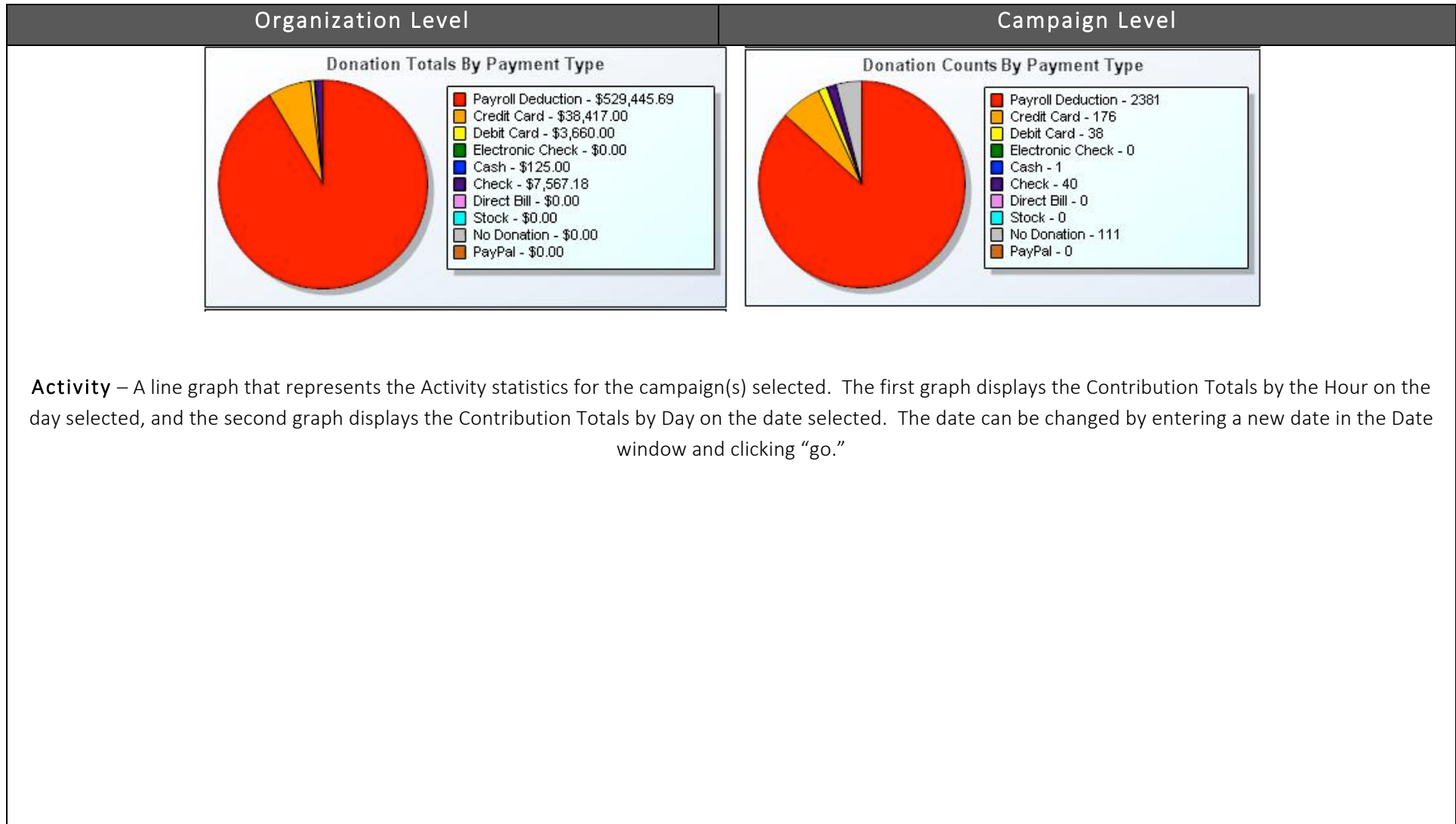
- Campaign goals are configured at the Campaign level, under Settings.
- **OPCS** stands for Online Pledge Capture System. This means the pledge was entered by a donor or someone impersonating the donor.
- **QPPI** stands for Quick Pledge Processing Interface. This means the pledge was entered via batch.

Donation Quick Statistics – A bar graph that represents Total Donation statistics for the campaign(s) selected. This graph displays the Total Donation Goal and the Total Donations.

Donor Quick Stats	
Total Potential Donors	1
Total Respondents Goal	1
Total Respondents (OPCS/QPPI)	0/0
Total Donors (OPCS/QPPI)	0/0

Donation Quick Stats	
Total Donation Goal	\$50,000.00
Total Donations	\$0.00

Payment Types – A pie chart that represents the Payment Type statistics for the campaign(s) selected. The first chart displays the Donation Totals by Payment Type, and the second chart displays the Donation Counts by Payment Type.



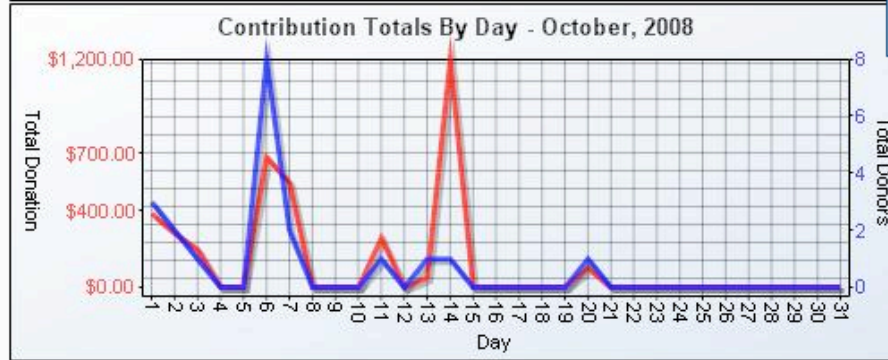
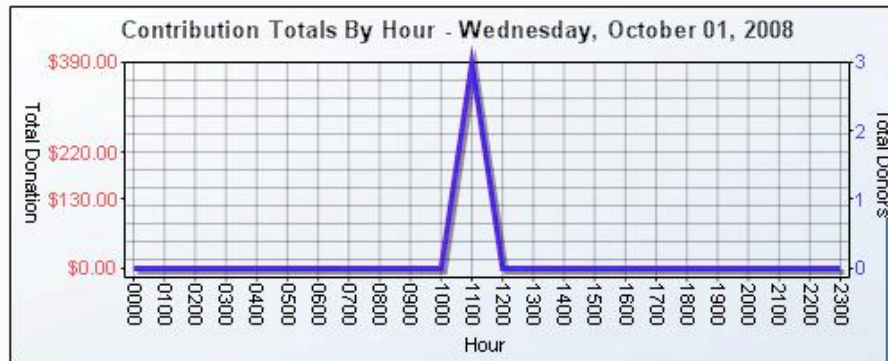


Organization Level

Campaign Level

Activity

Date



Change the date by entering a new date in this box.



Reports

...Reports can be found at the Organization, Company, and Campaign level of Campaign Management. They are designed to provide management tools for the campaign staff. Reports are user-specific, preventing other users to view reports generated by a particular user, unless that user selects the Share link, located at the bottom of the Report Criteria page (see image below).

Share

With other Users and Groups

Share with all Users and Groups with access to this Campaign

Reports can be generated as a PDF file, Text- Comma Delimited, Text- Tab Delimited, or Rich text (HTML) file. Note where to create new report criteria (A) and where to view or delete created reports (B) (see below).

To generate any report, from any level of Campaign Management, the campaign coordinator is required to fill in the appropriate information in the fields provided. Note that required fields are marked with an asterisk (*).

Report Criteria

[+ Create new report criteria](#) [X Delete selected Report Criteria](#)

Title	Description	Type
10 Size	none	Filter

Reports

[X Delete selected Reports](#)

Title	Description	Type	Status	Process Date
		none		



New Report Criteria Fields

New Report Criteria Fields		
Req	Field	Description
*	Type	Choose the type of report to generate. Organization level: Can choose from: <i>Organization Acknowledgement Detail, Organization Campaign Summary, Organization Survey Comment Detail, or Organization Survey Question Summary</i> — See details below on each. Company level: Can choose from: <i>Agency Summary, Annual Giving Company Level Summary, Coordinator Level Summary, or Functional Level Summary</i> — See below for details. Campaign level: Can choose from: <i>Acknowledgement Detail, Agency Designation Detail, Agency Designation Summary, Batch Donation Detail, Batch Donation Exception, Batch Payment Type Summary, Batch Summary, Campaign Settings Summary, Campaign Level Detail, Campaign Level Summary, Coordinator Level Detail, Coordinator Level Summary, Corporate Match Program Detail, Donation Detail, Donation Payment Detail, Donor Batch Designation Detail, Donor Designation Detail, Donor Status Detail, Functional Level Detail, Functional Level Summary, Negative Designation Detail, Non-Respondent Detail, Survey Comment Detail, Survey Question Summary</i> – See details below on each.
*	Format	Can choose <i>PDF, Text – Comma Delimited, Text – Tab Delimited, or HTML.</i>
*	Title	This title will be used to identify the report.
	Description	Can be the same as the title or can be used to provide additional details.
	Delivery Type	Can choose <i>none, FTP, or Email.</i> Note: Delivery, under the Reporting Option Sets must be configured at the Organization level before a report can be delivered via email or FTP.
	Options	Check to opt in for any options provided (options vary with Report Type).
	Use Template	Option to select a template.
	Share	Check to choose to share the report with other users and groups. Opting to share reports gives the coordinator the ability to mark a saved report as public, which makes the report public to all or specific users with access to the campaign.

Type	Organization Acknowledgement Detail <input type="checkbox"/> *
Format	PDF <input type="checkbox"/> *
Title	<input type="text"/> *
Description	<input type="text"/>
Delivery Type	- none - <input type="checkbox"/>
Options	<input type="checkbox"/> Schedule
Use Template	- select template - <input type="checkbox"/>
Filter	<input type="checkbox"/> Filter <input type="checkbox"/> <input type="checkbox"/> By Campaign <input type="checkbox"/> By Donor Properties <input type="checkbox"/> By Donation Properties <input type="checkbox"/> By Donation Source <input type="checkbox"/> By Payment Type
Share	<input type="checkbox"/> With other Users and Groups



To Generate a Report

Step 1:

Click [Create new report criteria](#)

Step 2:

Select a Report Type and fill in the appropriate information in the fields provided (see information above for details on Report Types). Specific filtering options will populate on the page for each filtering criteria chosen. Additionally, the system allows campaign administrators to include or exclude donors, based on the criteria selected.

Step 3:

Click [Generate](#) to generate the report

Click [Save / Update](#) to save the report for later use

Click [Save / Update & Generate](#) to save and generate the report

Click [Cancel / Return](#) to cancel the report and return to the last page



Exports

Exports are generated by Excel or as .txt files (comma delimited and tab delimited) and they contain raw data that can be manipulated in Excel or another similar program before being uploaded into a legacy system. Note where to create new export criteria (A) and where to view or delete previously created export criteria (B).

To generate each of the exports, the campaign coordinator is required to fill in the fields provided. Note that the Organization level New Export Fields differ from the Company and Campaign level.

Also note that some Exports are called Flexports. A flexport is essentially a flexible export – the fields within the export are customizable. Flexports are highly customizable, and give campaign administrators the ability to use many filters on exports.

Export Criteria

[+ Create new Export Criteria](#)
[Generate Selected Export Criteria](#)
[X Delete selected Export Criteria](#)

Name	Description	Type
	none	

10 Size **A** Filter

Exports

[X Delete selected Exports](#)

Name	Type	Status	Process Date
	none		

B



Organization Level New Export Criteria Fields

New Export Criteria Fields		
Req	Field	Description
*	Type	Choose the type of export to generate. Can choose from: <i>Acknowledgement, Agency, Agency Designation, Agency Designation Detail Flexport, Agency Mapping, Donation, Donation Flexport, Donor Designation, Organization Contacts, Organization Survey Comment Detail</i> – See below for details.
*	Name	This name will be used to identify the export.
	Description	Can be the same as the name or can be used to provide additional details.
	Include Description	Check to include the Description in the export.
	Include Header	Check to include a header in the export.
	Delivery Type	Can choose <i>none, FTP, or Email</i> . Note: Delivery, under the Reporting Option Sets must be configured at the Organization level before a report can be generated.

Type	- select type - <input type="button" value="v"/> *
Name	<input type="text"/> *
Description	<input type="text"/> <input type="button" value="up"/> <input type="button" value="down"/>
Include Description	<input type="checkbox"/>
Include Header	<input checked="" type="checkbox"/>
Delivery Type	- none - <input type="button" value="v"/>



Company and Campaign Level New Export Criteria Fields

New Export Criteria Fields		
Req	Field	Description
*	Type	Choose the type of report to generate. Company level: Can choose from: <i>Acknowledgement, Agency Designation Detail Flexport, Company Level, Coordinator Level, Deleted Matching Grant Flexport, Donation, Donation Flexport, Donor, Functional Level, Matching Grant, Matching Grant Questions</i> – See below for details. Campaign level: Can choose from: <i>Access, Access International, Acknowledgement, Agency Designation, Agency Designation Detail Flexport, Andar, Campaign Survey Comment Detail, Campaign Survey Question Detail, Campaign Donation, Deleted Donation, Donation, Donation Add-On, Donation Flexport, Donor, Donor Designation, Donor Flexport, Donor Group, Donor Leadership, Donor Recognition, FMS, HR, Missing Percent of Salary, National Agency, Negative Designation, Rainbow, Reporting Coordinator Level, Special Events, Stock, Where Raised Summary Flexport, or Write-In</i> – See below for details.
*	Format	Can choose <i>Comma Delimited, Tab Delimited, or Excel 2003+</i> .
*	Name	This name will be used to identify the export.
	Description	Can be the same as the name or can be used to provide additional details.
	Include Description	Check to include the Description in the export.
	Include Header	Check to include a header in the export.
	Options	Check to choose to use any of the options available (options

Type: Acknowledgement *

Format: Comma Delimited *

Name: *

Description:

Include Description:

Include Header:

Options:

Schedule
 Customize Format

Use Template: - select template -

Filter:

By Company Level
 By Coordinator
 By Coordinator Level
 By Donation Properties
 By Donation Report Label
 By Donation Source
 By Donation Status
 By Donor Custom Fields
 By Donor Custom Registration Fields
 By Donor Custom Variables
 By Donor Group
 By Donor Properties
 By Functional Level
 By Leadership Level
 By Last Year's Gift
 By Payment Type
 By Recognition Program

Share:

With other Users and Groups



New Export Criteria Fields		
Req	Field	Description
		vary with Export Type).
	Use Template	If desired, select a template.
	Share	Check to choose to share the export with other users and groups. Opting to share exports gives the coordinator the ability to mark a saved export as public, which makes the export to all specific users with access to the campaign. Once a report is shared, any users that the report or export is shared with will not be able to make any changes to the configuration of that report/export. They will just be able to run the report as it is configured.

Export Types at the Organization Level

Export Types	
Export Type	Description
Acknowledgement	The Acknowledgement export populates all activated Acknowledgement questions and answers presented to the donor at the time of their donation. Note that the report is grouped by donor. Filtering options allow the coordinator to choose to filter by <i>Campaign</i> , <i>Donor Properties</i> , <i>Donation Properties</i> , <i>Donation Source</i> , or by <i>Payment Type</i> .
Agency	The Agency export populates a generic agency export detailed with agency information. Filtering options allow the coordinator to choose to filter by <i>Agency Identification</i> .
Agency Designation	The Agency Designation report populates one line per designated agency (i.e. any entity selected as a designation in any campaign managed by the United Way, will show up once in this file). This export is intended to be used by all Organizations that process and distribute funds as an easy way to monitor work remaining in terms of agency identification. This export includes the Designation Entity Identifier, Standard Account Code, Designation Address and total Designation Amount. Filtering options allow the coordinator



Export Types

Export Type	Description
	to choose to filter by <i>Agency Label, Donation Properties, Donation Source, Donation Report Label, Designation Properties, Designation Properties, Designated Entity</i> , or by <i>Payment Type</i> .
Agency Designation Detail Flexport	The Agency Designation Detail Flexport is similar to the Agency Designation export, but generates in the form of a flexport. A flexport is essentially a flexible export – the fields within the export are customizable. Filtering options allow the coordinator to choose to filter by <i>Campaign Year, Company Level, Coordinator, Coordinator Level, Designation Properties, Designated Entity, Donation Properties, Donation Report Label, Donation Source, Donor Custom Fields, Donor Custom Variables, Donor Group, Donor Properties, Functional Level, Last Year’s Gift, Leadership Level, Payment Type</i> , or by <i>Recognition Program</i> .
Agency Mapping	Agency Mapping export populates agency mapping information. Filtering options allow the coordinator to choose to filter by <i>Agency Identification</i> .
Donation	The Donation export is a generic pledge processing export that populates with detailed donor transaction and designation information, as well as other pertinent donor record data. Filtering options allow the coordinator to choose to filter by <i>Campaign Year, Distributing Organization, Managing Organization, Campaign, Donor Properties, Donation Properties, Donation Source, Payment Type, Last Year’s Gift</i> , or by <i>Donor Group</i> .
Donation Flexport	The Donation Flexport is similar to the Donation export, but generates in the form of a flexport. A flexport is essentially a flexible export – the fields within the export are customizable. Filtering options allow the coordinator to choose to filter by <i>Campaign Year, Distributing Organization, Managing Organization, Campaign, Donor Properties, Donation Properties, Donation Source, Payment Type, Last Year’s Gift</i> , or by <i>Donor Group</i> .
Donor Designation	The Donor Designation export populates one line per donation, per designated agency. This is a large export but is one of the easiest ways to see a full picture of activity within multiple campaigns. Filtering options allow the coordinator to choose to filter by <i>Campaign Year, Distributing Organization, Donation Properties, Donation Source, Payment Type, Donation Report Label, Designation Properties</i> , or by <i>Designated Entity</i> .
Organization Contacts	The Organization Contacts export populates all organization contacts. Filtering options allow the coordinator to choose to filter by <i>Campaign</i> .
Organization Survey Comment Detail	The Organization Survey Comment Detail report generates detailed survey results for all campaigns. This report is available as a report or export. Filtering options allow the coordinator to choose to filter by <i>Campaign</i> or by <i>Campaign Status Type</i> .



Export Types at the Company Level

Export Types	
Export Type	Description
Acknowledgement	The Acknowledgement export populates all activated Acknowledgement questions and answers presented to the donor at the time of their donation. Note that the report is grouped by donor. Filtering options allow the coordinator to choose to filter by <i>Campaign, Donor Properties, Donation Properties, Donation Source, or by Payment Type</i> .
Agency Designation Detail Flexport	The Agency Designation Detail Flexport lists all donors who designated and the amount of the designation by specific agency in the form of a flexport. A flexport is essentially a flexible export – the fields within the export are customizable. Filtering options allow the coordinator to choose to filter by <i>Campaign Year, Company Level, Coordinator, Coordinator Level, Designation Properties, Designated Entity, Donation Properties, Donation Report Label, Donation Source, Donor Custom Fields, Donor Custom Variables, Donor Group, Donor Properties, Functional Level, Last Year’s Gift, Leadership Level, Payment Type, or by Recognition Program</i> .
Company Level	The Company Level export populates all Company Levels within a company. This export contains four columns of data: Parent Code, Code, Name, and Path. The Company Level export is helpful for reviewing existing Company Levels and their hierarchy. Filtering options are not offered for Company Level exports.
Coordinator Level	The Coordinator Level export populates Coordinator Levels within a company. This export contains four columns of data: Parent Code, Code, Name, and Path. The Coordinator Level export is helpful for reviewing existing Coordinator Levels and their hierarchy. Filtering options are not offered for Coordinator Level exports.
Deleted Matching Grant Flexport	The Deleted Matching Grant Flexport populates all deleted matching grants to a flexport file. A flexport is essentially a flexible export – the fields within the export are customizable. Filtering options are not available for Deleted Matching Grant Flexports.
Donation	The Donation export is a generic pledge processing export that populates with detailed donor transaction and designation information, as well as other pertinent donor record data. Filtering options allow the coordinator to choose to filter by <i>Campaign Year, Company Level, Coordinator, Coordinator Level, Designated Entity, Donation Properties, Designated Entity, Donation Properties, Donation Report Label, Donation Source, Donor Custom Fields, Donor Custom Registration Fields, Donor Custom variables, Donor Group, Donor Properties, Functional Level, Last Year’s Gift, Leadership Level, Payment Type, or by Recognition Program</i> .
Donation Flexport	The Donation Flexport is similar to the Donation export, but generates in the form of a flexport. A flexport is essentially a flexible export – the fields within the export are customizable. Filtering options allow the coordinator to choose to filter by <i>Campaign Year, Distributing Organization, Managing Organization, Campaign, Donor Properties, Donation Properties, Donation Source, Payment</i>



Export Types

Export Type	Description
	<i>Type, Last Year's Gift, or by Donor Group.</i>
Donor	The Donor export populates all donor records within the company, regardless of donation status. This export uses the same formatting as a Donor Import file and is designed as a simple means for extracting and associating existing donors to a new campaign year. Encrypted fields, such as password or salary amount, will not populate in the export for security reasons. Filtering options allow the coordinator to choose to filter by <i>Company Level, Coordinator Level, Coordinator, Donor Custom Fields, Donor Custom Registration Fields, Donor Custom Variables, Donor Properties, Donation Status, Functional Level, or by Last Year's Gift.</i>
Functional Level	The Functional Level export populates Functional Levels within a company. This export contains four columns of data: Parent Code, Code, Name, and Path. The Functional Level export is helpful for reviewing existing Functional Levels and their hierarchy. Filtering options are not offered for Functional Level exports.
Matching Grant	The Matching Grant export populates all Matching grants at the Company level. Filtering options allow the coordinator to choose to filter by <i>Matching Grant Program</i> or by <i>Matching Grant Properties.</i>
Matching Grant Questions	The Matching Grant Questions export populates all Matching Grant Questions at the Company level. Filtering options allow the coordinator to choose to filter by <i>Matching Grant Program.</i>

Export Types at the Campaign Level

Export Types

Export Type	Description
Access	Access exports are designed for use with Access International pledge processing systems. Only donor records with submitted pledges (including No Donation gifts) will be exported. Non-Respondents do not populate in this export. Filtering options allow the coordinator to choose to filter by <i>Campaign Year, Company Level, Coordinator, Coordinator Level, Designation Properties, Designated Entity, Donation Properties, Donation Report Label, Donation Source, Donor Custom Fields, Donor Custom Variables, Donor Group, Donor Properties, Functional Level, Last Year's Gift, Leadership Level, Payment Type, or by Recognition Program.</i>
Access International	Access International exports are designed for use with Access International pledge processing systems. This export can be used to facilitate data imports into Enterprise. Filtering options allow the coordinator to choose to filter by <i>Campaign Year, Company Level,</i>



Export Types

Export Type	Description
	<i>Coordinator, Coordinator Level, Designation Properties, Designated Entity, Donation Properties, Donation Report Label, Donation Source, Donor Custom Fields, Donor Custom Variables, Donor Group, Donor Properties, Functional Level, Last Year's Gift, Leadership Level, Payment Type, or by Recognition Program.</i>
Acknowledgement	The Acknowledgement export populates all activated Acknowledgement questions and answers presented to the donor at the time of their donation. Note that the report is grouped by donor. Filtering options allow the coordinator to choose to filter by <i>Campaign, Donor Properties, Donation Properties, Donation Source, or by Payment Type.</i>
Agency Designation	The Agency Designation report populates one line per designated agency (i.e. any entity selected as a designation in any campaign managed by the United Way will show up once in this file). This export is intended to be used by all Organizations that process and distribute funds as an easy way to monitor <i>work</i> remaining in terms of agency identification. This export includes the Designation Entity Identifier, Standard Account Code, Designation Address and total Designation Amount. Filtering options allow the coordinator to choose to filter by <i>Agency Label, Donation Properties, Donation Source, Donation Report Label, Designation Properties, Designation Properties, Designated Entity, or by Payment Type.</i>
Agency Designation Detail Flexport	The Agency Designation Detail Flexport is similar to the Agency Designation export, but generates in the form of a flexport. A flexport is essentially a flexible export – the fields within the export are customizable. Filtering options allow the coordinator to choose to filter by <i>Campaign Year, Company Level, Coordinator, Coordinator Level, Designation Properties, Designated Entity, Donation Properties, Donation Report Label, Donation Source, Donor Custom Fields, Donor Custom Variables, Donor Group, Donor Properties, Functional Level, Last Year's Gift, Leadership Level, Payment Type, or by Recognition Program.</i>
Andar	The Andar export was designed to kick out records that contain Write-In or National Database agencies, since they do not have a book number. If a campaign allowed for Write-In agencies or National agencies, then campaign coordinators will also need to generate the corresponding exports. Because the Andar Export was designed for use with Andar back end pledge processing systems, only donor records that have submitted pledges (including No Donation gifts) will be exported. Non-Respondents do not populate in this export. Filtering options allow the coordinator to choose to filter by <i>Campaign Year, Company Level, Coordinator, Coordinator Level, Designation Properties, Designated Entity, Donation Properties, Donation Report Label, Donation Source, Donor Custom Fields, Donor Custom Variables, Donor Group, Donor Properties, Functional Level, Last Year's Gift, Leadership Level, Payment Type, or by Recognition Program.</i>
Campaign Survey Comment Detail	The Campaign Survey Detail export is designed to allow users to download donor survey data for analysis. Filtering options are not available for the Campaign Survey Comment Detail export.



Export Types

Export Type	Description
Campaign Survey Question Detail	The Campaign Survey Detail export is designed to allow users to download donor survey data for analysis. Filtering options are not available for the Campaign Survey Comment Detail export.
Company Donation	The Company Donation export was designed for companies and their payroll departments. This export incorporates detailed payroll information. Designation data does not populate in this export. Filtering options allow the coordinator to choose to filter by <i>Campaign Year, Company Level, Coordinator, Coordinator Level, Designation Properties, Designated Entity, Donation Properties, Donation Report Label, Donation Source, Donor Custom Fields, Donor Custom Variables, Donor Group, Donor Properties, Functional Level, Last Year's Gift, Leadership Level, Payment Type</i> , or by <i>Recognition Program</i> .
Deleted Donation	The Deleted Donation export populates deleted donations in the system. Filtering options are not available for Deleted Donation exports.
Donation	The Donation export is a generic pledge processing export that populates with detailed donor transaction and designation information as well as other pertinent donor record data. Filtering options allow the coordinator to choose to filter by <i>Campaign Year, Distributing Organization, Managing Organization, Campaign, Donor Properties, Donation Properties, Donation Source, Payment Type, Last Year's Gift</i> , or by <i>Donor Group</i> .
Donation Add-On	The Donation Add-On export captures payroll add-on donation details. Filtering options allow the coordinator to choose to filter by <i>Campaign Year, Company Level, Coordinator, Coordinator Level, Designation Properties, Designated Entity, Donation Properties, Donation Report Label, Donation Source, Donor Custom Fields, Donor Custom Variables, Donor Group, Donor Properties, Functional Level, Last Year's Gift, Leadership Level, Payment Type</i> , or by <i>Recognition Program</i> .
Donation Flexport	The Donation Flexport is similar to the Donation export, but generates in the form of a flexport. A flexport is essentially a flexible export – the fields within the export are customizable. Filtering options allow the coordinator to choose to filter by <i>Campaign Year, Distributing Organization, Managing Organization, Campaign, Donor Properties, Donation Properties, Donation Source, Payment Type, Last Year's Gift</i> , or by <i>Donor Group</i> .
Donor	The Donor export exports all donors associated with a campaign, regardless of donation status. This export does not populate any donor transaction information. Donor exports generate limited donor salary information, but do not export donor salary amounts. This export has the ability to filter Non-Respondents by utilizing the <i>Has Donated</i> filter. Filtering options allow the coordinator to choose to filter by <i>Company Level, Coordinator, Donor Custom Fields, Donor Custom Registration Fields, Donor Custom Variables, Donor Group, Donor Where Raised Zip Code, Functional Level, Last Year's Gift, Leadership Level, Coordinator Level, Donor Properties</i> ,



Export Types

Export Type	Description
	<i>Donation Status, or by Recognition Program.</i>
Donor Designation	The Donor Designation export populates one line per donation, per designated agency. This is a large export but is one of the easiest ways to see a full picture of activity within multiple campaigns. Filtering options allow the coordinator to choose to filter by <i>Campaign Year, Distributing Organization, Donation Properties, Donation Source, Payment Type, Donation Report Label, Designation Properties, or by Designated Entity.</i>
Donor Flexport	The Donor Flexport is similar to the Donor export, but generates in the form of a flexport. A flexport is essentially a flexible export – the fields within the export are customizable. Filtering options allow the coordinator to choose to filter by <i>Company Level, Coordinator, Donor Custom Fields, Donor Custom Registration Fields, Donor Custom Variables, Donor Group, Donor Where Raised Zip Code, Functional Level, Last Year’s Gift, Leadership Level, Coordinator Level, Donor Properties, Donation Status, or by Recognition Program.</i>
Donor Group	The Donor Group export populates Donor Group settings information, including website association, total donors, and total donations. Filtering options allow the coordinator to choose to filter by <i>Donor Group.</i>
Donor Leadership	The Donor Leadership export populates spouse and leadership recognition information. This export includes Leadership level Name, Preferred Recognition Name, and spouse information. Filtering options allow the coordinator to choose to filter by <i>Company Level, Coordinator, Donation Status, Donor Custom Fields, Donor Custom Registration Fields, Donor Custom Variables, Donor Group, Donor Properties, Functional Level, Last Year’s Gift, Leadership Level, Recognition Program, or by Coordinator Level.</i>
Donor Recognition	The Donor Recognition export generates qualified donors who have opted into a Recognition Program. Filtering options allow the coordinator to choose to filter by <i>Company Level, Coordinator, Donation Status, Donor Custom Fields, Donor Custom Variables, Donor Group, Functional Level, Last Year’s Gift, Leadership Level, Coordinator Level, Donor Properties, or by Recognition Program.</i>
FMS	The FMS export format is designed for use with FMS pledge processing systems. Only donor records with submitted pledges (including No Donation gifts) will be exported. Non-Respondents do not populate in this export. Filtering options allow the coordinator to choose to filter by <i>Campaign Year, Company Level, Coordinator, Coordinator Level, Designation Properties, Designated Entity, Donation Properties, Donation Report Label, Donation Source, Donor Custom Fields, Donor Custom Variables, Donor Group, Donor Properties, Functional Level, Last Year’s Gift, Leadership Level, Payment Type, or by Recognition Program.</i>
HR	The HR export is designed for accounting/HR departments. This export populates all donors associated within a campaign, including Non-Respondent and No Donation pledges. The HR export exports limited pledge information and does not export designation



Export Types

Export Type	Description
	information. Filtering options allow the coordinator to choose to filter by <i>Company Level, Coordinator, Coordinator Level, Donation Status, Donor Custom Fields, Donor Custom Registration Fields, Donor Custom Variables, Donor Group, Donor Properties, Functional Level, Leadership Level</i> , or by <i>Recognition Program</i> .
Missing Percent of Salary	The Missing Percent of Salary export populates donors who do not have a salary associated to their record. Filtering options are not available for Missing Percent of Salary exports.
National Agency	The National Agency export exports detailed National IRS Agency designation information – particularly the national agencies’ EIN and address. Filtering options allow the coordinator to choose to filter by <i>Campaign Year, Company Level, Coordinator, Coordinator Level, Designation Properties, Designated Entity, Donation Properties, Donation Report Label, Donation Source, Donor Custom Fields, Donor Custom Variables, Donor Group, Donor Properties, Functional Level, Last Year’s Gift, Leadership Level, Payment Type</i> , or by <i>Recognition Program</i> .
Negative Designation	The Negative Designation export exports detailed Negative Designation information. Negative Designation information does not populate any of the pledge processing exports. Filtering options allow the coordinator to choose to filter by <i>Campaign Year, Company Level, Coordinator, Coordinator Level, Designation Properties, Designated Entity, Donation Properties, Donation Report Label, Donation Source, Donor Custom Fields, Donor Custom Variables, Donor Group, Donor Properties, Functional Level, Last Year’s Gift, Leadership Level, Payment Type</i> , or by <i>Recognition Program</i> .
Rainbow	The Rainbow export format is designed for use with Rainbow back end pledge processing systems. Only donor records with submitted pledges (including No-Donation gifts) will be exported. Non-Respondents do not populate in this export. Filtering options allow the coordinator to choose to filter by <i>Campaign Year, Company Level, Coordinator, Coordinator Level, Designation Properties, Designated Entity, Donation Properties, Donation Report Label, Donation Source, Donor Custom Fields, Donor Custom Variables, Donor Group, Donor Properties, Functional Level, Last Year’s Gift, Leadership Level, Payment Type</i> , or by <i>Recognition Program</i> .
Reporting Coordinator Level	The Coordinator Level Export populates all Coordinator levels within the company. This export contains four columns of data: Parent Code, Code, Name, and Path. The Coordinator Level export is helpful for reviewing existing Company Levels and its hierarchy. Filtering options allow the coordinator to choose to filter by <i>Company Level, Coordinator, Donation Properties, Donation Report Label, Donation Source, Donor Custom Fields, Donor Custom Registration Fields, Donor Custom Variables, Donor Group, Donor Where Raised Zip Code, Functional Level, Last Year’s Gift, Leadership Level, Payment Type, Coordinator Level, Donor Properties, Donation Status</i> , or by <i>Recognition Program</i> .



Export Types

Export Type	Description
Special Events	The Special Events export populates all special events details entered into the campaign. Filtering options allow the coordinator to choose to filter by <i>Campaign Year, Company Level, Coordinator Level, Date Range, Donor Group, Functional Level</i> .
Stock	The Stock export populates Stock pledge information. Includes number of shares, sticker symbol, and broker. Filtering options allow the coordinator to choose to filter by <i>Campaign Year, Company Level, Coordinator, Coordinator Level, Designated Entity, Designation Properties, Donation Report Label, Donation Source, Donor Custom Fields, Donor Custom Registration Fields, Donor Custom Variables, Donor Group, Donor Properties, Functional Level, Last Year's Gift, Leadership Level, or by Recognition Program</i> .
Write-In	The Write-In export exports detailed Write-In designation information. If a campaign allows donor Write-Ins, this export must be ran, in addition to the pledge processing export. Write-In designations need to be verified for authenticity before they are manually entered into the system. Filtering options allow the coordinator to choose to filter by <i>Campaign Year, Company Level, Coordinator, Coordinator Level, Designation Properties, Designated Entity, Donation Properties, Donation Report Label, Donation Source, Donor Custom Fields, Donor Custom Variables, Donor Group, Donor Properties, Functional Level, Last Year's Gift, Leadership Level, Payment Type, or by Recognition Program</i> .



To Generate an Export

Step 1: Click [Create new Export Criteria](#)

Step 2: Select an Export Type and fill in the fields provided (see information above for details on Export Types)

Step 3:

Click [Generate](#) to generate the export

Click [Save / Update](#) to save the export for later use

Click [Save / Update & Generate](#) to save and generate the export

Click [Cancel / Return](#) to cancel the export and return to the last page

Export Criteria

[Create new Export Criteria](#)
[Generate Selected Export Criteria](#)
[Delete selected Export Criteria](#)

Name	Description	Type
	none	
10	Size	Filter <input style="width: 50px;" type="text"/>

Exports

[Delete selected Exports](#)

Name	Type	Status	Process Date
	none		

[Refresh](#) | [Cancel / Return](#)



Report/Export Queue

After a report or export has been generated it will go into a queue status. Reports/exports are placed in queue along with all reports across the system. While this may seem congested, the reports/exports typically process in less than a minute, depending on the size of the request. Click refresh to see what progress the report/export has made in the queue. A queue status is indicated in the report/export list, located at the bottom of the Report or Export page. Also notice that the report/export cannot be modified or viewed, as indicated by the grayed out icons, located on the right side of the report/export list.

Once this page has been refreshed, the report/export will become available for use.

Report Criteria

[Create new report criteria](#) [Delete selected Report Criteria](#)

Title	Description	Type
	none	

10 Size Filter

Reports

[Delete selected Reports](#)

Title	Description	Type	Status	Request Date	Process Date	
<input type="checkbox"/>	Donation Detail Test Report	Donation Detail - PDF	Queued (1)	5/3/2011 3:32 PM		

Report Criteria

[Create new report criteria](#) [Delete selected Report Criteria](#)

Title	Description	Type
	none	

10 Size Filter

Reports

[Delete selected Reports](#)

Title	Description	Type	Status	Request Date	Process Date	
<input type="checkbox"/>	Donation Detail Test Report	Donation Detail - PDF	Queued (1)	5/3/2011 3:32 PM		



[Refresh](#) | [Cancel / Return](#)



Schedule Report/Exports


The ability to schedule a report or export to run on specified criteria allows administrators the option of automatically generating a report on a one-time, daily, weekday, weekly, or monthly basis. Scheduling can be done from all three levels of Campaign Management.

To Schedule a Report or Export

1. From the Reports of Exports area, select  [Create new report criteria](#) or  [Create new Export Criteria](#)
2. The page will refresh with a dropdown list of available reports or exports. Select the desired report/export and allow the page to refresh again.
3. Name the report/export and select any desired filtering criteria
4. Select Schedule, in the Options section of the page. The page will refresh and display scheduling criteria options.
5. Select desired schedule for the report/export. The schedule selected will indicate the frequency the report/export will be automatically generated.

Scheduling Types	
Scheduling Type	Description
One-Time	Generates a single time at the date and time specified.
Daily	Generates every day at the time specified.
Weekdays	Generates Monday through Friday at the time specified.
Weekly	Generates once a week at the time specified.
Monthly	Generates once a month at the time specified.



6. Fill in the fields provided.
7. Select  **Generate**
8. The report will be placed into the reporting queue for processing.

Summary Reports Exports

Type Organization Acknowledgement Detail *

Format PDF *

Title *

Description

Delivery Type - none -

Options

Schedule

Schedule - Select Schedule - *

Time *


Start Date *

End Date


Use Template - select template -

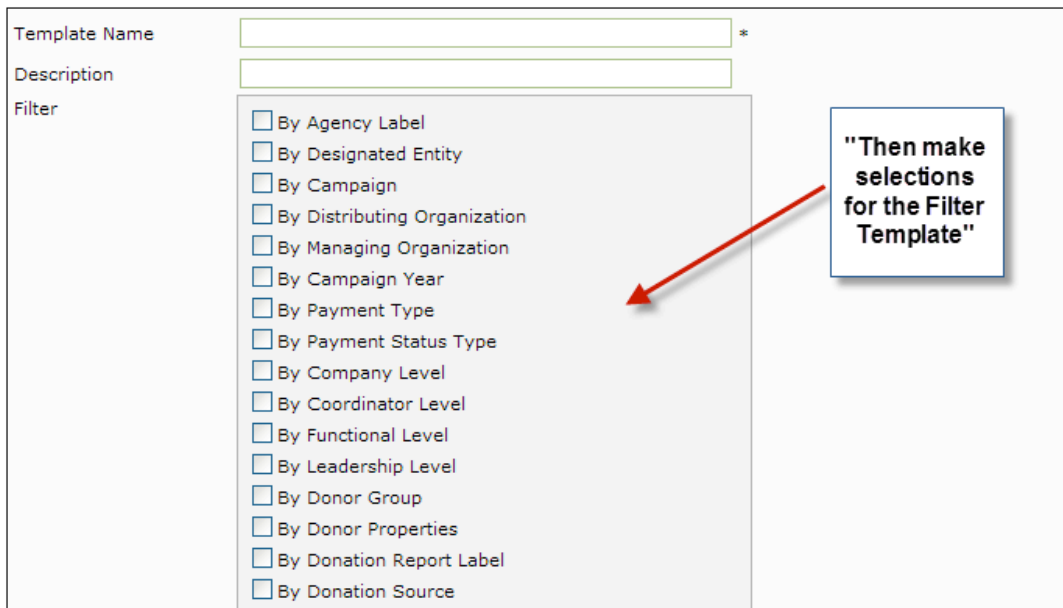


Templates

Templates are available at the  Organizations level and are designed to give campaign coordinators the ability to create filter templates, which can be used with any campaign Report or Export at the Organization level. Export filter templates are not user specific, allowing administrators to share Export Templates with all users with access to Reports or Exports.

To Add a Filter Template

1. Click  [Add new Filter Template](#)
2. Enter a Template name and description. Then make selections for the Filter Template



Template Name *

Description

Filter

- By Agency Label
- By Designated Entity
- By Campaign
- By Distributing Organization
- By Managing Organization
- By Campaign Year
- By Payment Type
- By Payment Status Type
- By Company Level
- By Coordinator Level
- By Functional Level
- By Leadership Level
- By Donor Group
- By Donor Properties
- By Donation Report Label
- By Donation Source

"Then make selections for the Filter Template"

3. Click  [Save / Update](#)



Reporting Option Sets

Campaign coordinators configure Reporting settings at [Reporting Option Sets](#). Reporting Option Sets can be found at the Organization level, but can be applied to all levels of Campaign Management.

Delivery

Delivery provides the ability to automatically deliver reports to administrative users without the users having to take any action. Delivery Option Sets must be configured in order for a report or export at the Organization level to be delivered.

To Set up Delivery Option Sets

Step 1:

Click [Add a new delivery option set](#)

Step 2:

Enter a name and description.

Step 3:

Click [Save / Update](#)

Name	Description	Type
25	Size	Filter

Step 4:

Then click [Add a new delivery option](#)



Step 5: Enter a name, description, and delivery type. Delivery types include **FTP** or **email**.

Step 6: Once a Delivery Type is selected, more fields will appear on the screen. Fill in the appropriate information in the fields provided.



FTP Delivery Type

Email Delivery Type

Step 7: Click **Save / Update** when complete.




Reporting Option Packages

Use  **Packages** to bundle the settings configured in Reporting Option Sets.  **Packages** tag configured settings to a campaign or to a Donor Group in order to create different donor experiences for different Donor Groups.

Note: Always name packages very intuitively

To Add a Reporting Option Package

1. Click  [Add a new option package](#)
2. Fill in the fields provided to define the Reporting Option Package

Code	<input type="text"/>	*
Name	<input type="text"/>	*
Description	<input type="text"/>	
Where Raised Reporting Set	<input type="text" value="- select fundraising option set -"/>	▼
Delivery Option Set	<input type="text" value="- none -"/>	▼
Default	<input type="checkbox"/>	

3. Click  [Save / Update](#)