



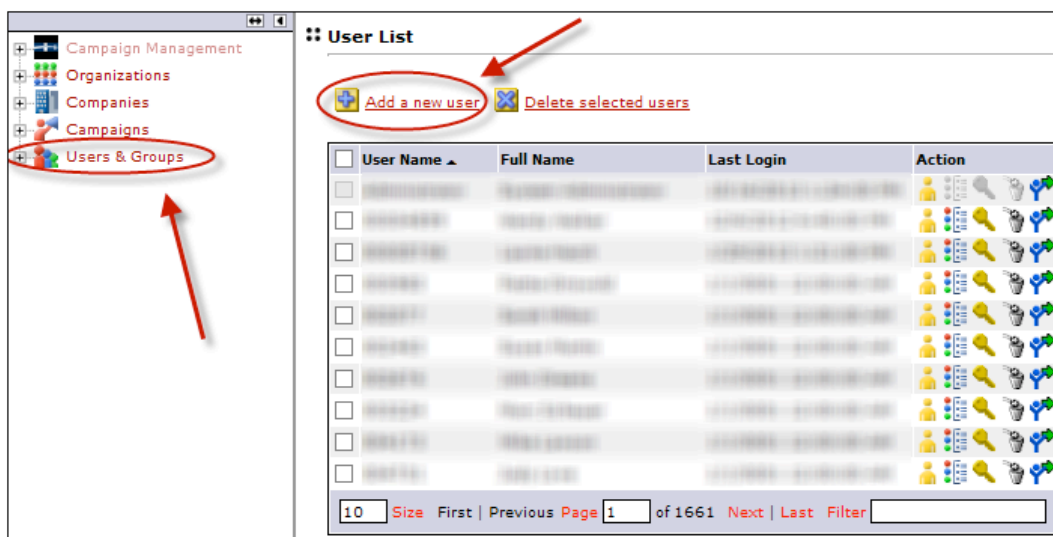
# HOW TO DELIVER REPORTS TO COORDINATORS VIA CAMPAIGN MANAGEMENT

This document provides the steps taken to have any Campaign Management report delivered right to a company campaign coordinator via email or FTP without giving them admin access on Campaign Management.

## Deliver Reports to Coordinators

To have any Campaign Management report delivered right to a company campaign coordinator via email or FTP without giving them admin access on Campaign Management, take the following steps:

1. Create a new user. Log in to CM and navigate to Users & Groups and click the “Add New User” link.



2. Give the coordinator a username and password. The coordinator will use this username/password later to view the report. Fill in any remaining required fields. Click the “Save/Update” link.



User Member Of Permissions Associations

\* = required

Username:  \*  
 Password:  \*  
 Password Confirmation:  \* \*  
 Last Password Changed: (expire on < n/a >)  
 Failed Login Attempts: 0 (max allow: 5)  
 Last Login: < n/a >  
 Login Count: 0

First Name:  \*  
 Middle Name:   
 Last Name:  \*  
 Email Address:  \*

**History**

Date	User	Event	Comments
			none

|

- Click the Associations tab at the top of the page. Verify the user is associated to your organization. Then click the "Save/Update" link.

User Member Of Permissions Associations

Organization ▾

**Available Organizations**

- 1

**Associated Organizations**

Truist

|



4. Create a Reporting Option Set/Package. Navigate to the Organization Level > Reporting Option Sets > Delivery. Then click the “Add new delivery option set” link.

The screenshot shows the 'Organizations' navigation tree on the left. The path 'Reporting Option Sets' > 'Delivery' is highlighted with red circles. In the main content area, the 'Add a new delivery option set' link is also circled in red. Below the link is a table with columns for 'Name' and 'Description', containing various reporting option sets.

5. Give your Delivery Option Set a name and description. Then click the “Save/Update” link.

The form has a header with navigation icons and tabs for 'Where Raised', 'Delivery', and 'Packages'. It contains two input fields: 'Name' (with an asterisk) and 'Description'. At the bottom, there are two buttons: 'Save / Update' and 'Cancel / Return'.

6. Click the “Add new deliver option” link.



Name: BioWorks2013 \*

Description: BioWorks2013

**Delivery Options**

[Add a new delivery option](#)

Name	Description	Type
	none	

25 Size Filter

Save / Update | Cancel / Return

7. Give the Delivery Option Set a name and description. Make sure the name is intuitive.

**Email Delivery:**

- a. Select “Email” for the Delivery Type field.
- b. Search for the coordinator(s) you would like to receive the report(s).

Name: Coordinator \*

Description: Coordinator

Delivery Type: Email \*

Available Users	Selected Users
kendaltesting	kendaltesting

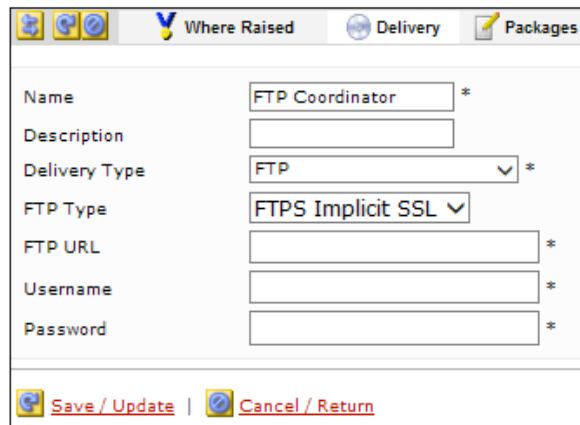
kendaltesting

Save / Update | Cancel / Return



**FTP Delivery:**

- a. Select “FTP” for the Delivery Type field.
- b. Select from the following FTP types:
  - FTPS Implicit SSL
  - FTPS Explicit SSL
  - SFTP
- c. Fill in the required FTP login information.



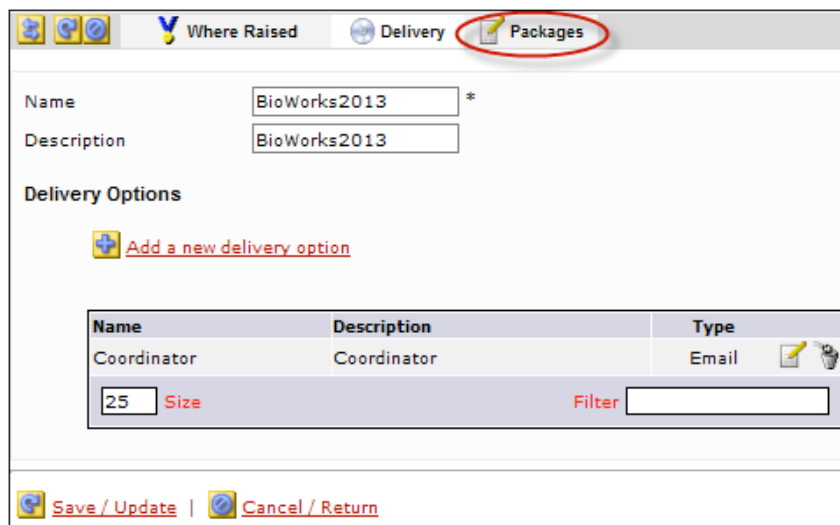
The screenshot shows a form with the following fields and values:

- Name: FTP Coordinator \*
- Description: (empty)
- Delivery Type: FTP \*
- FTP Type: FTPS Implicit SSL \*
- FTP URL: (empty) \*
- Username: (empty) \*
- Password: (empty) \*

Buttons at the bottom: Save / Update | Cancel / Return



8. Click the “Save/Update” link.

9. Create a Reporting Option Set Package. Click the Packages tab at the top of the page.



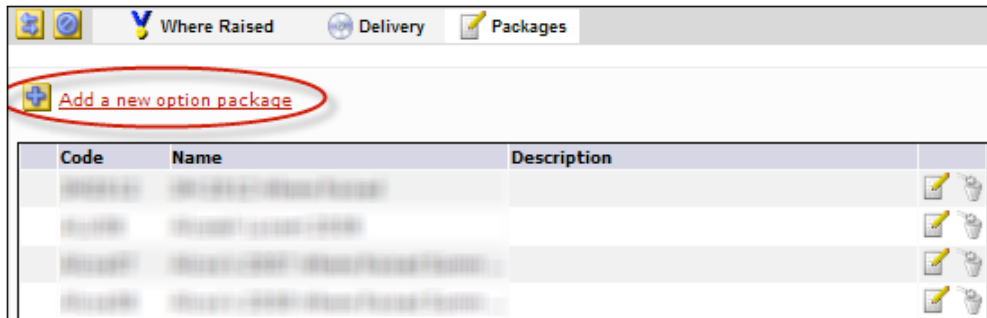
The screenshot shows the 'Packages' tab selected. The form contains:









- Name: BioWorks2013 \*
- Description: BioWorks2013
- Delivery Options**
  - [Add a new delivery option](#)
- Table:
 

Name	Description	Type
Coordinator	Coordinator	Email  
- Size: 25 Filter: (empty)

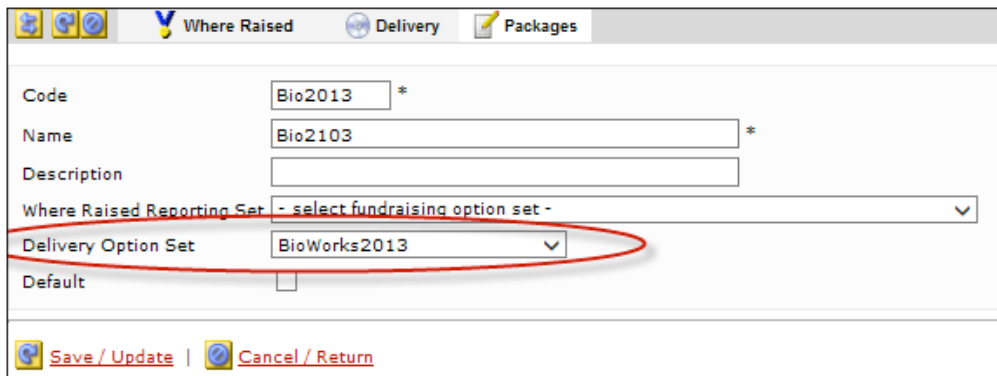
Buttons at the bottom: Save / Update | Cancel / Return

10. Click the “Add new option package” link.

Code	Name	Description	
			 
			 
			 
			 

- Fill in the fields provided. Leave the Where Raised Reporting Set field blank. For the Delivery Reporting Set field, select the Reporting Option Set you created in the previous steps. Then click the "Save/Update" link.



Code: Bio2013 \*

Name: Bio2103 \*

Description:

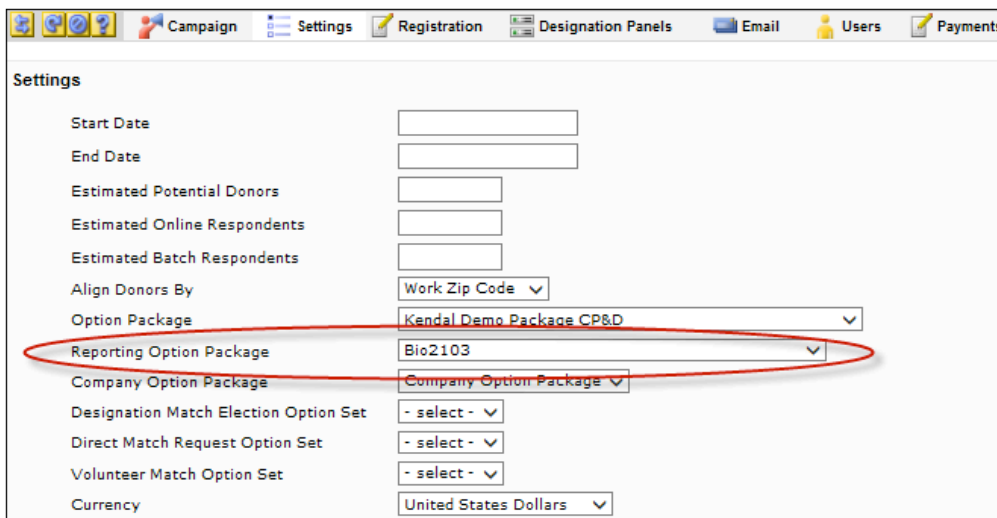
Where Raised Reporting Set: - select fundraising option set -

Delivery Option Set: BioWorks2013

Default:

Save / Update | Cancel / Return

- Navigate to the Campaign Settings. Select the Reporting Option Package you created in the previous step. Then click the "Save/Update" link.



Settings

Start Date:

End Date:

Estimated Potential Donors:

Estimated Online Respondents:

Estimated Batch Respondents:

Align Donors By: Work Zip Code

Option Package: Kendal Demo Package CP&D

Reporting Option Package: Bio2103

Company Option Package: Company Option Package

Designation Match Election Option Set: - select -

Direct Match Request Option Set: - select -

Volunteer Match Option Set: - select -

Currency: United States Dollars



13. Create the report. Fill in the fields provided.

Use the following criteria for the following fields. Repeat this for any future reports that need to be sent to the coordinator(s) assigned to this Reporting Option Set.

- a. For the Delivery Type field, select “Email” or “FTP” depending on how the coordinator would like to receive the file and what is set up at the Reporting Option Set level.
- b. For the Delivery Option field, select the name of the Delivery Option Set you created in the previous steps.
- c. Enter a subject line for the email the coordinator will receive.

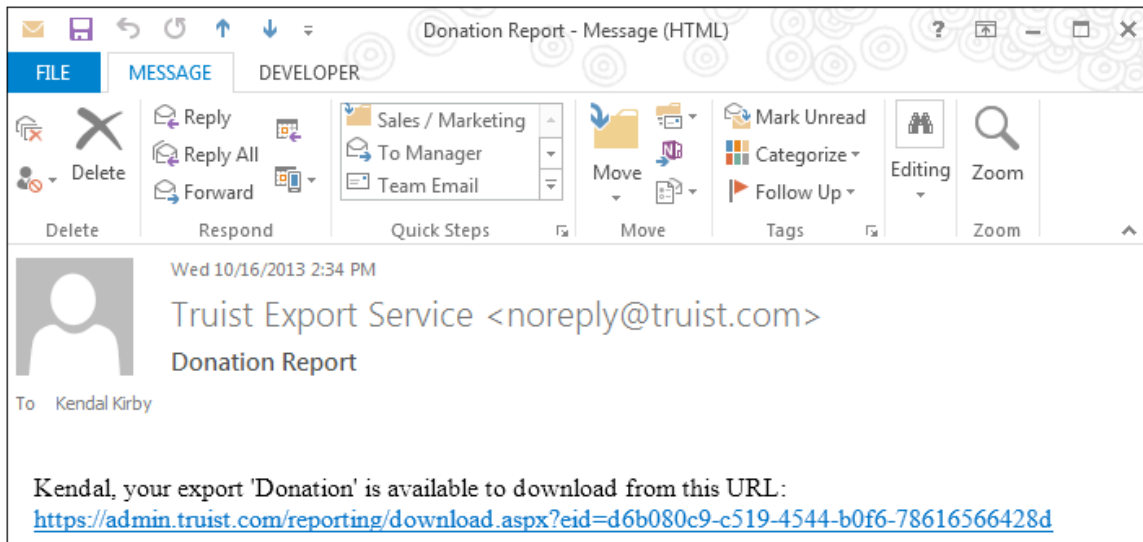
Click the “Generate” link to generate and send the report.

The screenshot shows a web-based configuration interface for creating a report. At the top, there are navigation tabs for 'Summary', 'Reports', 'Exports', and 'Series'. The main form contains the following fields and options:

- Type:** Donation (dropdown menu, marked with an asterisk)
- Format:** Comma Delimited (dropdown menu, marked with an asterisk)
- Name:** Donation (text input field, marked with an asterisk)
- Description:** (empty text area)
- Include Description:**
- Include Header:**
- Delivery Type:** Email (dropdown menu, highlighted in yellow)
- Delivery Option:** Coordinator (dropdown menu, highlighted in yellow)
- Email Subject Line:** Donation Report (text input field, highlighted in yellow, marked with an asterisk)
- Export Series:** - select series - (dropdown menu)
- Options:** A group box containing three checkboxes: Profile By, Schedule, and Customize Format, all of which are currently unchecked.
- Use Template:** - select template - (dropdown menu)

A red arrow points from the right side of the form towards the 'Delivery Type' field.

14. The coordinator will receive a link to the report via email or FTP. The username/password you created in the first steps will be needed for the coordinator to access the report via email.



In addition to the report being sent to the coordinator, you will also have access to the report via campaign management at any time.

