UNDERSTANDING COORDINATOR HIERARCHY IN CAMPAIGN MANAGEMENT

This document provides information on the structure of the Coordinator Hierarchy in Campaign Management, including suggestions on efficient methods and naming schemes to consider during Dashboard setup.

Definitions

- **Coordinator Level** – Determines what groups of donor records a coordinator will have access to through the campaign Dashboard.

- **Coordinator Role** – Determines what information a coordinator will have access to within his/her Coordinator Level (group). Assigning a Coordinator Role to a coordinator's donor record activates the Dashboard on the donor site for a specific donor. From the Dashboard, campaign coordinators can manage donors they are responsible for, send email, and generate reports or exports. The information that populates in the reports, as well as the visible filtering options, is controlled by the campaign administrator in OPPS.

Coordinator Roles

Each row is a different Coordinator Role containing different user Dashboard permissions. Coordinator Roles correspond to Coordinator Levels and are assigned to donors in a campaign.

- **Reporting Coordinator Level** – The highest coordinator level code that a campaign coordinator is responsible for. The campaign coordinator will be able to view summary level campaign details as well as donors associated to this coordinator level and its children. A coordinator may be assigned multiple reporting levels.

- **Summary Coordinator Level** – Allows coordinators to view summary level campaign numbers for selected coordinator levels without the ability to report on them or email them. A coordinator may be assigned multiple summary levels. **Note:** The summary coordinator levels cannot be the same as the reporting coordinator levels. If added via OPPS Admin or donor import, the coordinator cannot modify the Summary Coordinator Levels they see.

- **Parent Level** – The original source of the information. Where other levels stem from. A Parent level has a higher rank or has more authority than a Child level.

Here, the USA Coordinator Level is a Parent level to the East Coordinator Level and the East Coordinator Level is a Parent level to the two levels immediately under it, the DC, NY, and PA Coordinator Levels.

- **Child Level** – The sub-level of a Parent level. The Child level pulls information from its Parent level.

	Name	Code	Depth	
☐	USA	USA	1	
☐	East	East	2	
☐	DC	DC	3	
☐	NY	NY	3	
☐	PA	PA	3	
☐	Midwest	Midwest	2	
☐	IL	IL	3	
☐	OH	OH	3	
☐	WI	WI	3	
☐	South	South	2	

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Note that the East Coordinator Level is both a Parent level and a Child level; it is a Parent level to its Child levels, the DC, NY, and PA Coordinator Levels, but is a Child level to its Parent level, the USA Coordinator Level.

- **Dashboard** – A link that appears on the donor site for any employee associated with a Coordinator Role. This link will give the employee access to the reporting associated with his/her position in the Coordinator Level hierarchy. This link works directly off the Coordinator Level hierarchy.

Upon clicking this link, the donor will be brought to the Dashboard, where they can view campaign statistics, generate reports/exports, and send email right from the donor site.

Coordinator Levels

Coordinator Levels are a hierarchical representation of reporting levels, similar to a family tree or an organization chart of a corporation. Coordinator Levels are used to group and arrange the structure around permission settings and access of a Campaign Coordinator's Dashboard account. If desired, a multi-layer Coordinator Level hierarchy can be established, providing coordinators the ability to view a subset of donors, as well as all of the donors they are responsible for.

To access and edit existing Coordinator Levels or to manually add new levels, sign in to OPPS and expand the Company level > Coordinator Levels.

- Lingua Franca
  - Contacts
  - Company Levels
  - Coordinator Levels
  - Functional Levels
  - Pay Periods
  - Encryption
  - Option Sets
  - Users
  - Donors
  - Tools
  - Matching Grants
  - Importing
  - Reporting

➕ Add a new coordinator level   ❌ Delete selected levels

	Name	Code	Depth		
☐	USA	USA	1		
☐	East	East	2		
☐	DC	DC	3		
☐	NY	NY	3		
☐	PA	PA	3		
☐	Midwest	Midwest	2		
☐	IL	IL	3		
☐	OH	OH	3		
☐	WI	WI	3		
☐	South	South	2		

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Coordinator Level Ranking System

Coordinator Levels take the form a tree and are set up as groups that correspond to a company's coordinator requirements. Coordinator Levels are often organized by the company's locations, but they can be configured any way that works best for the company. While setting up Coordinator Levels, it is important to keep in mind that each Coordinator Level should be configured with the intention of assigning a Coordinator Role to it. The Coordinator Role will be aligned to specific donors responsible for various Dashboard features. Typically campaign coordinators with the most permissions and responsibility, will be aligned to Coordinator Levels that display higher up on the tree.

DIAGRAM - A

	Name	Code	Depth	
☐	USA	USA	1	
☐	East	East	2	
☐	DC	DC	3	
☐	NY	NY	3	
☐	PA	PA	3	
☐	Midwest	Midwest	2	
☐	IL	IL	3	
☐	OH	OH	3	
☐	WI	WI	3	
☐	South	South	2	

View in OPPS

| 10 | Size | First | Previous Page | 1 | of 2 | Next | Last | Filter | |

Coordinator/Donor Sally is aligned to the "East" Coordinator Level and **is** assigned a Coordinator Role. Donor Amy is aligned to the "DC" Coordinator Level, but is **not** assigned a Coordinator Role. Because Sally is aligned with the "East" Coordinator Level and is assigned a Coordinator Role, she will see the Dashboard on her donor site. When she opens the Dashboard, she will only see donors aligned under the "East" Coordinator Level (the "DC" level, "NY" level, and the "PA" level); Sally will see donors such as Amy.

Summary

	Level	Population	Respondent Goal	Respondents	Non-Respondents	Donation Goal	Donors	Pledged	Pledged Amount Per Donor	Pledged Amount Per Capita
☐	East	44	0% (0)	0 (0.00%)	44 (100.00%)	$12,500.00	0 (0.00%)	$0.00		$0.00

View on the donor site's Dashboard

Upon clicking this link, the donor/coordinator will see all child levels beneath this level.

	Level	Population	Respondent Goal	Respondents	Non-Respondents	Donation Goal	Donors	Pledged
☐	East	1	0% (0)	0 (0.00%)	1 (100.00%)	$12,500.00	0 (0.00%)	$0.00
☐	• DC	26	0% (0)	0 (0.00%)	26 (100.00%)	$6,250.00	0 (0.00%)	$0.00

frontstream WORKPLACE PHILANTHROPY

DIAGRAM - B

	Name	Code	Depth	
☐	USA	USA	1	🔲🗑
☐	East	East	2	🔲🗑
☐	DC	DC	3	🔲🗑
☐	NY	NY	3	🔲🗑
☐	PA	PA	3	🔲🗑
☐	Midwest	Midwest	2	🔲🗑
☐	IL	IL	3	🔲🗑
☐	OH	OH	3	🔲🗑
☐	WI	WI	3	🔲🗑
☐	South	South	2	🔲🗑
☐	GA	GA	3	🔲🗑
☐	TX	TX	3	🔲🗑
☐	VA	VA	3	🔲🗑
☐	West	West	2	🔲🗑
☐	CO	CO	3	🔲🗑
☐	OR	OR	3	🔲🗑

Coordinator Level structure in OPPS

Use the two samples provided to compare the import file and the Coordinator Level Structure in OPPS. Notice how the levels assigned a Parent level become the Parent level's sub-level.

	A	B	C	
1	1-Coordinator Level Code	2-Parent Coordinator Level Code	3-Coordinator Level Name	4- Coordinator
2	USA		USA	
3	East	USA	East	
4	DC	East	DC	
5	NY	East	NY	
6	PA	East	PA	
7	Midwest	USA	Midwest	
8	IL	Midwest	IL	
9	WI	Midwest	WI	
10	OH	Midwest	OH	
11	South	USA	South	
12	GA	South	GA	
13	TX	South	TX	
14	VA	South	VA	
15	West	USA	West	

Coordinator Level import file

Coordinator Roles are configured within the Coordinator Option Set. A single Coordinator Option Set may contain multiple Coordinator Roles.

To access the Coordinator Roles, sign in to OPPS and expand the Company level > Option Sets > Coordinator.

DIAGRAM - C

This example demonstrates how it would appear in OPPS if a company organized their Coordinator Roles around level of permissions. This company either gives coordinators full access to the dashboard ("Full Access"), all but exporting privileges ("All – No Exporting"), or all privileges but exporting and payment permissions ("All – No Exporting/No Manage Payments"). In this example, the company may have assigned the "Full Access" role to coordinators who need to be able to access all donors, all exports, and any other reports under their Coordinator Level.

Assigning a Coordinator Settings to Donors

Donors that are also Coordinators for a campaign are assigned a **Coordinator Level**, **Coordinator Role**, **Reporting Coordinator Level**, and optionally a **Summary Coordinator Level**. These settings configured together define the donor's Dashboard user experience and available data. After Coordinator Levels and Coordinator Roles are set up at the Company level, they must be assigned to a donor either manually or via a Donor Import file.

Manually Assigning the Coordinator Settings

If donors have already been added to the system and you only need to assign the Coordinator Level, Coordinator Role, Reporting Coordinator Level, and/or Summary Coordinator Level to a few donors, open the donor settings and mark the options as shown in the diagram below. Please note that the Summary Coordinator Level is optional.

```
⊟ Lingua Franca 2012 [LingFr
      Settings
      Registration
      Designation Panels
   ⊞ Email
      Users
      Payments
      Tools
      Donors
   ⊞ Donor Groups
   ⊞ Importing
   ⊞ Websites
   ⊞ Batches
   ⊞ Reporting
      Special Events
```

DIAGRAM - D

This diagram represents the Donor Settings page, under the Campaign level in OPPS. Here, the Coordinator Role, Reporting Coordinator Level, Summary Coordinator Level, and the Coordinator Level is assigned to a donor if not indicated via a Donor Import.

Donor Import

DIAGRAM - E

	AL	BQ	BY	CQ
1	38-Coordinator Hierarchy Code	69-Coordinator Hierachy Role Code	77-Coordinator Hierarchy Reporting Code	95-CoordinatorSummaryCode
2	NY	NoExporting/Payments	NY	
3	DC	FullAccess	DC	
4	NY	NoExporting/Payments	NY	
5	DC			
6	PA			
7	USA			

Donor Import File

Please note that the cells between th...

Use the two samples provided to compare the import file and the settings that are affected in the Donor Settings. Please note that the settings configured below reflect the highlighted row in the import file.

Campaign Settings

Donor Group	SPE Demo Donor Group
Coordinator Role	[NoExporting/Payments] All - No Exporting/No Manage Payments

Coordinator Hierarchy Role Code - Column BQ

Available Coordinator Levels
- (CO) CO
- (DC) DC
- (East) East
- (GA) GA
- (IL) IL
- (Midwest) Midwest
- (NY) NY
- (OH) OH
- (OR) OR
- (PA) PA

Selected Coordinator Levels
- (NY) NY

Reporting Coordinator Level

Campaign Donor Settings

Coordinator Hierarchy Reporting Code - Column BY

Available Coordinator Levels
- (CO) CO
- (DC) DC
- (East) East
- (GA) GA
- (IL) IL
- (Midwest) Midwest
- (NY) NY
- (OH) OH
- (OR) OR
- (PA) PA

Selected Coordinator Levels

Summary Coordinator Level

Coordinator Summary Code - Column CQ

Settings

Company Level	[none]
Coordinator Level	[NY] NY
Functional Level	[none]
Coordinator	[none]
System Administrator User Name	[none]
Donor Ceiling Override	

Coordinator Hierarchy - Code - Column AL