eWay (Campaign Management) Dashboard Configuration

Revised: July 22, 2022

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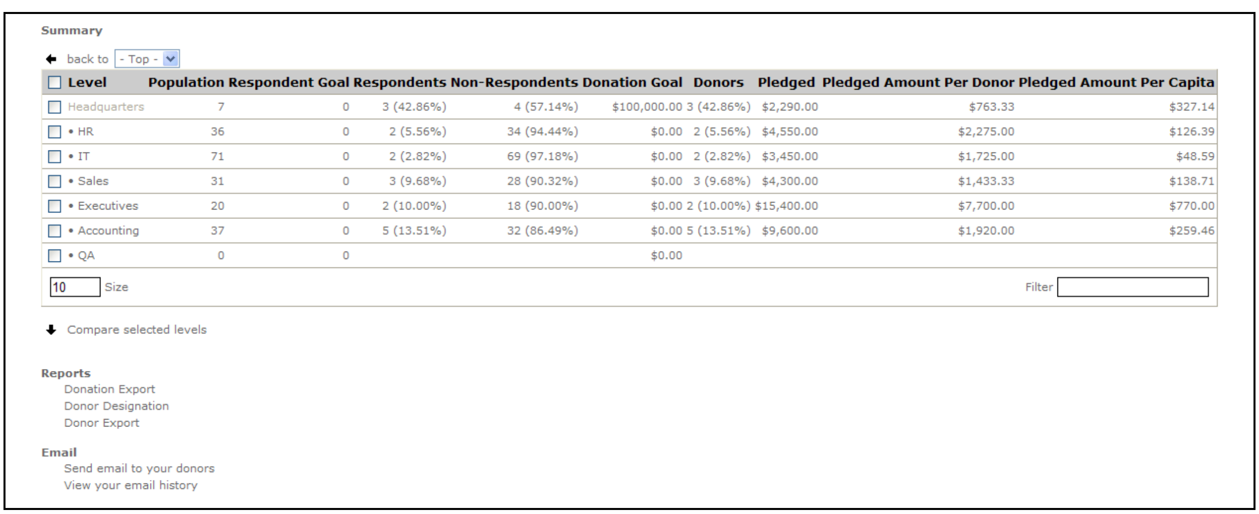
Introduction

The Campaign Management (eWay) Dashboard allows the Campaign Coordinators to easily access campaign statistics, generate reports / exports, and send email without ever leaving the Donor Site. Use of the Dashboard:

- Streamlines Coordinator access to track campaign results – no need for a separate administrator login
- Decreases the number of people requiring access to the Administrator Site
- Simplifies training for Campaign Coordinators by limiting the access to administrative functions
- Provides Coordinators with the ability to track campaign progress in real-time – 24/7/365.
- Facilitates employee engagement through the use of targeted email
- Reduces the number of files required by the client to set up the campaign since Coordinator access and security roles are assigned through the donor import file.

By empowering Campaign Coordinators with the dashboard tools, they are better able to engage donors in a meaningful way – resulting in increased participation and greater campaign success.

Below are screenshots of the donor experience when Dashboard is activated:



Summary

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Level	Population	Respondent Goal	Respondents	Non-Respondents	Donation Goal	Donors	Pledged	Pledged Amount Per Donor	Pledged Amount Per Capita
Headquarters	7	0	3 (42.86%)	4 (57.14%)	$100,000.00	3 (42.86%)	$2,290.00	$763.33	$327.14
• HR	36	0	2 (5.56%)	34 (94.44%)	$0.00	2 (5.56%)	$4,550.00	$2,275.00	$126.39
• IT	71	0	2 (2.82%)	69 (97.18%)	$0.00	2 (2.82%)	$3,450.00	$1,725.00	$48.59
• Sales	31	0	3 (9.68%)	28 (90.32%)	$0.00	3 (9.68%)	$4,300.00	$1,433.33	$138.71
• Executives	20	0	2 (10.00%)	18 (90.00%)	$0.00	2 (10.00%)	$15,400.00	$7,700.00	$770.00
• Accounting	37	0	5 (13.51%)	32 (86.49%)	$0.00	5 (13.51%)	$9,600.00	$1,920.00	$259.46
• QA	0	0			$0.00				

10 Size Filter

Compare selected levels

Reports
Donation Export
Donor Designation
Donor Export

Email
Send email to your donors
View your email history

Dashboard Configuration

The steps for setting-up Dashboard are as follows:

- Configure Coordinator Levels
- Create Coordinator Option Set
- Configure Coordinator Roles
- Add Coordinator Option Set to Company Option Package
- Associate Company Option Package to Campaign
- Select a Default Coordinator Level (Optional)
- Associate Donors with Coordinator Levels
- Assign Coordinator Role to Donor
- Assign Reporting Levels

It is important to note that the Dashboard settings are primarily configured at the Company Level of the Navigation Tree. Therefore, once they have been established the Dashboard can be easily activated for use with multiple campaigns within a single company simply by associating the Company Option Package to the campaign.

See the sections that follow for step-by-step instructions for completing each of the above set-up steps.

1. Configure 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 group donor records to which you can assign Campaign Coordinator access to through the Dashboard. If desired, a multi-layer Coordinator Level hierarchy can be established providing a coordinator the ability to view a subset of donors as well as all of the donors they are responsible for. Alternately, you can create a single-layer Coordinator Level hierarchy.

For example in the illustration below, a Coordinator assigned to 'Coord-1' would have access to donors associated to Coord-1, Coord-1.1, Coord-1.1.1, Coord-1.2, and Coord-1.3. But would NOT have access to donors associated to any of the other Coordinator Levels, i.e. Coord-2.

	Name	Code	Depth	
	Coord-1	Coord-1	1	
	Coord-1.1	Coord-1.1	2	
	Coord-1.2	Coord-1.2	2	
	Coord-1.3	Coord-1.3	2	
	Coord-2	Coord-2	1	
	Coord-2.1	Coord-2.1	2	
	Coord-2.2	Coord-2.2	2	
	Coord-3	Coord-3	1	
	Coord-3.1	Coord-3.1	2	
	Finan-3.1	Finan-3.1	3	

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

Dashboard

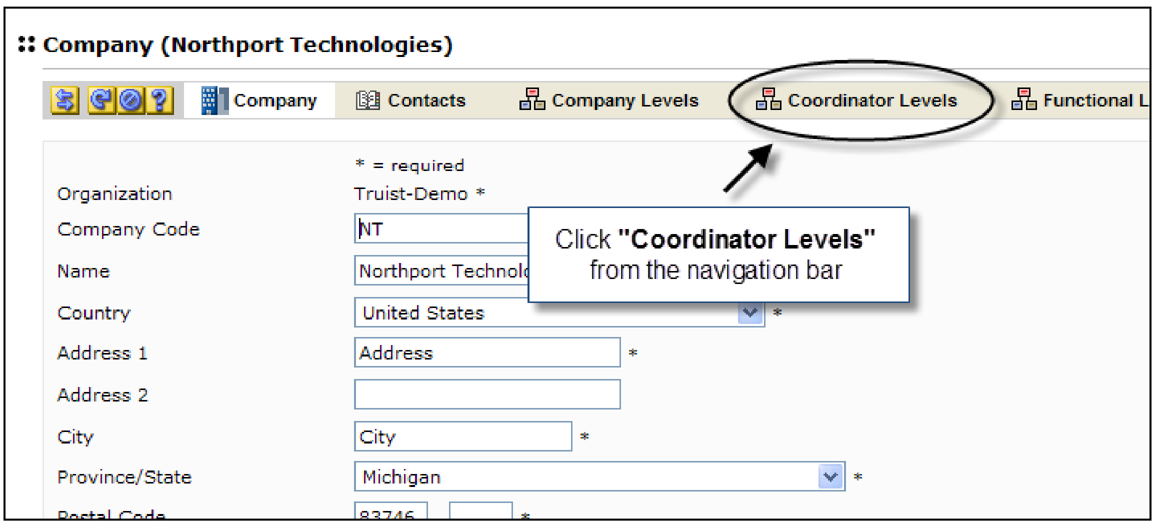
Coordinator Levels are configured at the Companies level and can be created manually or via a Coordinator Level Import file. Below are step-by-step instructions for manually creating Coordinator Levels.

Note: For companies with complex Coordinator Hierarchies it is recommended that the Coordinator Levels be created via a file import. Refer to the Coordinator Level Import file specification and file import help documentation for details.

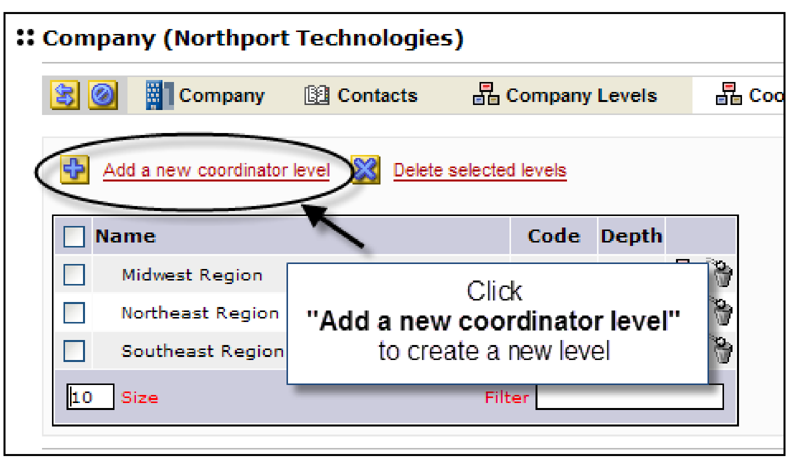
1. Select Companies from the left navigation tree to access the **Company List** page.
2. If necessary, Filter the list of companies to find your Company

3. Click the icon next to the Company Name for the company you wish to work with to access that Company's profile page**.**

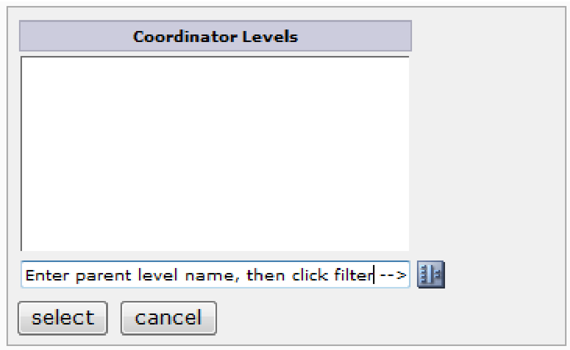
4. Click the **"Coordinator Levels"** link on the top navigation bar.



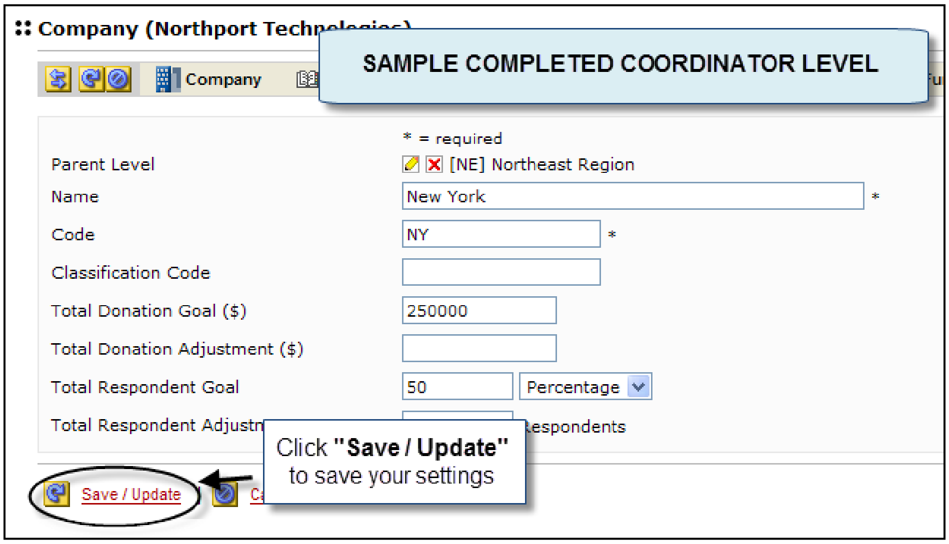
5. Click **"Add a new coordinator level"**.



6. Enter the required and desired optional information to define the Coordinator Level. ***Note:*** Required fields are indicated by an asterisk (*).

Coordinator Level Fields		
Req	**Field**	**Description**
	Parent Level	Denotes the level above the one you are creating – thus creating a parent – child relationship between the two levels. Applies only when creating a hierarchical reporting structure. To do this, follow the steps below: • click the icon to display a list of available Coordinator Levels • if necessary, filter the list by the parent level name  • • select the "parent level name" from the list • click the <select> button
*	Name	This is the name that will be used to identify the Coordinator Level on the Dashboard and within reports / exports.
*	Code	This is the code associated with the coordinator level. The code is used in the Donor Import File to associate donors to the coordinator level.
	Classification Code	**ADVANCED FUNCTIONALITY –** For use by FrontStream staff only.
	Total Donation Goal	Dollar goal for donors within the coordinator level. **Note:** The amount recorded here will be used to calculate and display percent of goal on the Dashboard Statistics.
	Total Donation Adjustment	Allows you to adjust the total dollars raised towards goal by either a positive or negative number.
	Total Respondent Goal	Participation goal for the coordinator level. Value can be entered as either the actual number of respondents, or as a percentage of the Estimated Potential Donor Count established for the donor group. **Note:** The amount recorded here will be used to calculate and display percent of goal on the Dashboard Statistics.
	Total Respondent Adjustment	Allows you to adjust the total respondent rate by either a positive or negative number.

7. Click **"Save / Update"** at the bottom of the page to save your settings.



8. Repeat steps 4 – 6 until all desired Coordinator Levels have been created.

2. Create Coordinator Option Set

The Coordinator Option Set contains one or more Coordinator Roles that define the coordinator user experience when viewing the dashboard. The Coordinator Option Set also controls participation rules and other dashboard options that will be applied to across all Coordinator Roles linked to it.

These are set up at the Companies level and may be used across multiple campaigns within that company. Follow the steps below to create a new Coordinator Option Set:

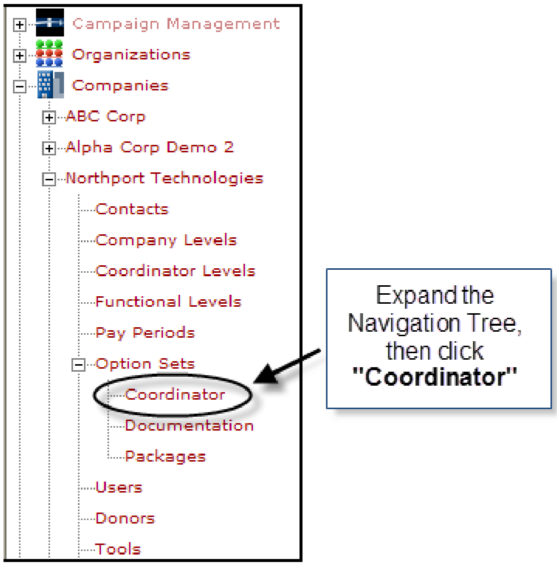
1. Select Companies from the left navigation tree to access the **Company List** page.
2. If necessary, Filter the list of companies to find your Company

3. Click the icon next to the Company Name for the company you wish to work with to access that Company's profile page.

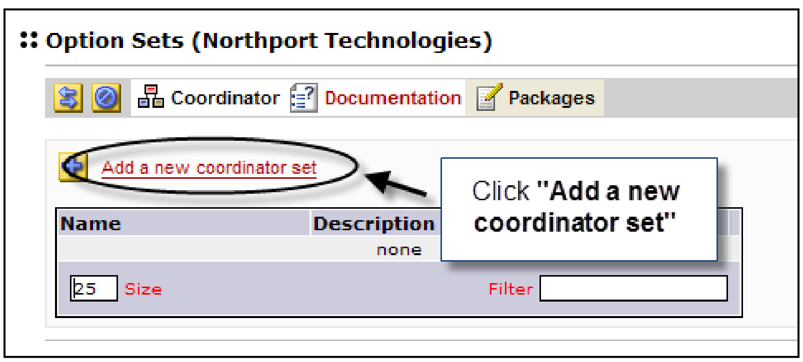
4. Click the icon on the top navigation bar to sync the navigation tree to the selected company.

5. Click the ⊞ next to **Option Sets** to expand the navigation tree further.

6. Click **Coordinator** to access the ***Coordinator Option Sets*** page.



7. Click **"Add a new coordinator set"**.

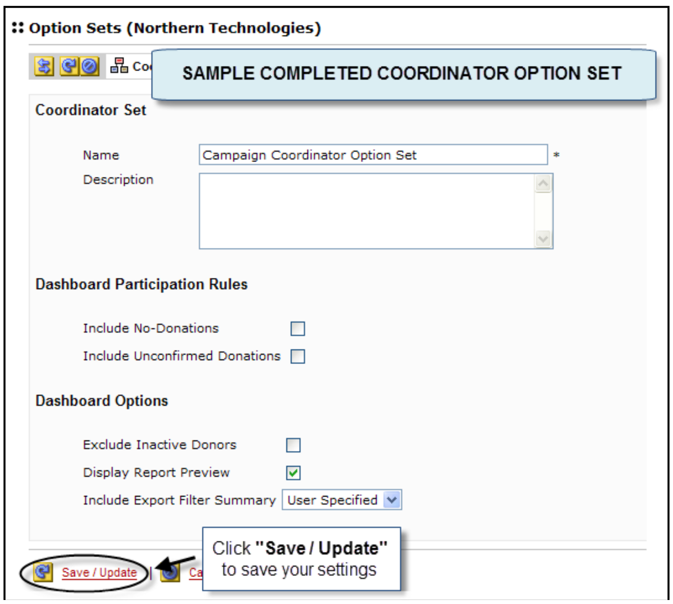


8. Enter the required and desired optional information to define the Coordinator Option Set. ***Note:*** Required fields are indicated by an asterisk (*).

Coordinator Option Set Fields		
Req	**Field**	**Description**
*	Name	This is the name that will be used to identify the Coordinator Option Set.
	Description	Can be used to provide additional details.
	Include No-Donations	If checked, individuals making a "No Donation" pledge will be counted as having participated in the campaign. However, they will not be counted as a donor. **Note:** The default is "unchecked" which indicates these individuals will not count as campaign participants.
	Include Unconfirmed Donations	If checked, unconfirmed donations will be presented in the same manner as a confirmed donation on the dashboard. **Note:** The default is "unchecked" which will not include these transactions in the dashboard statistics.

Coordinator Option Set Fields		
Req	**Field**	**Description**
	Exclude Inactive Donors	If checked donors marked as "inactive", and any associated transactions, will be excluded from the campaign statistics. **Note:** The default is "unchecked" which will include these transactions in the campaign statistics.
	Display Report Preview	If checked a preview of the report results will be displayed on the Dashboard page. **Note:** By default this is "checked" resulting in the report preview display.
	Include Export Filter Summary	Determines whether or not the report filter criteria is included when the data is exported – *select 'Never', 'User Specified' or 'Always' from the list.* **Note:** The default is 'Never'.

9. Click **"Save / Update"** at the bottom of the page to save your settings.



3. Configure Coordinator Roles

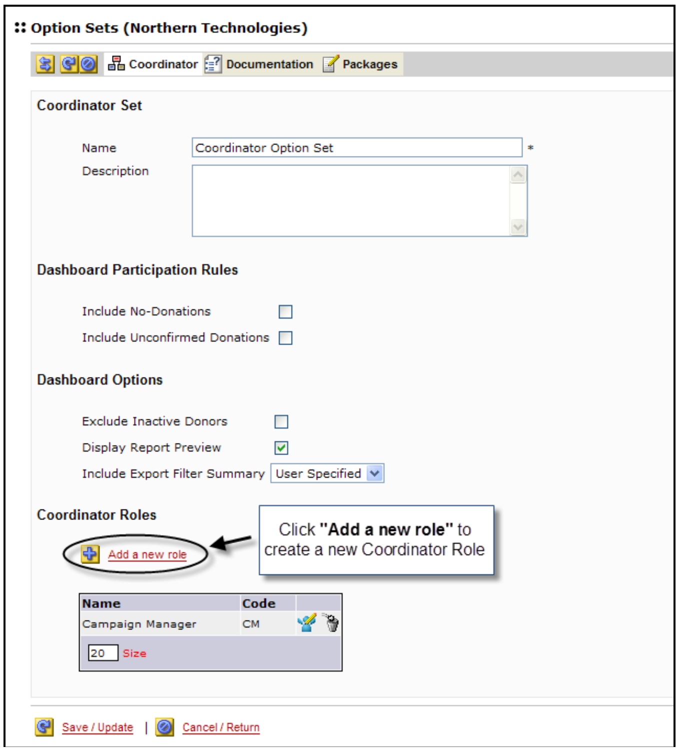
Coordinator Roles are used to define a set of permissions and saved reports for the Dashboard. Within each role you can define the following:

- Columns that display in the Campaign Summary
- Fields that display on the Report Preview
- Email access and capabilities
- Data export access

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

See instructions in Section B above to create a Coordinator Option Set prior to configuring the Coordinator Roles. Once created follow the steps below to configure the Coordinator Roles.

1. Click **"Add a new role"**. **Note:** This link will appear at the bottom of the Coordinator Option Set profile page after saving a new option set.



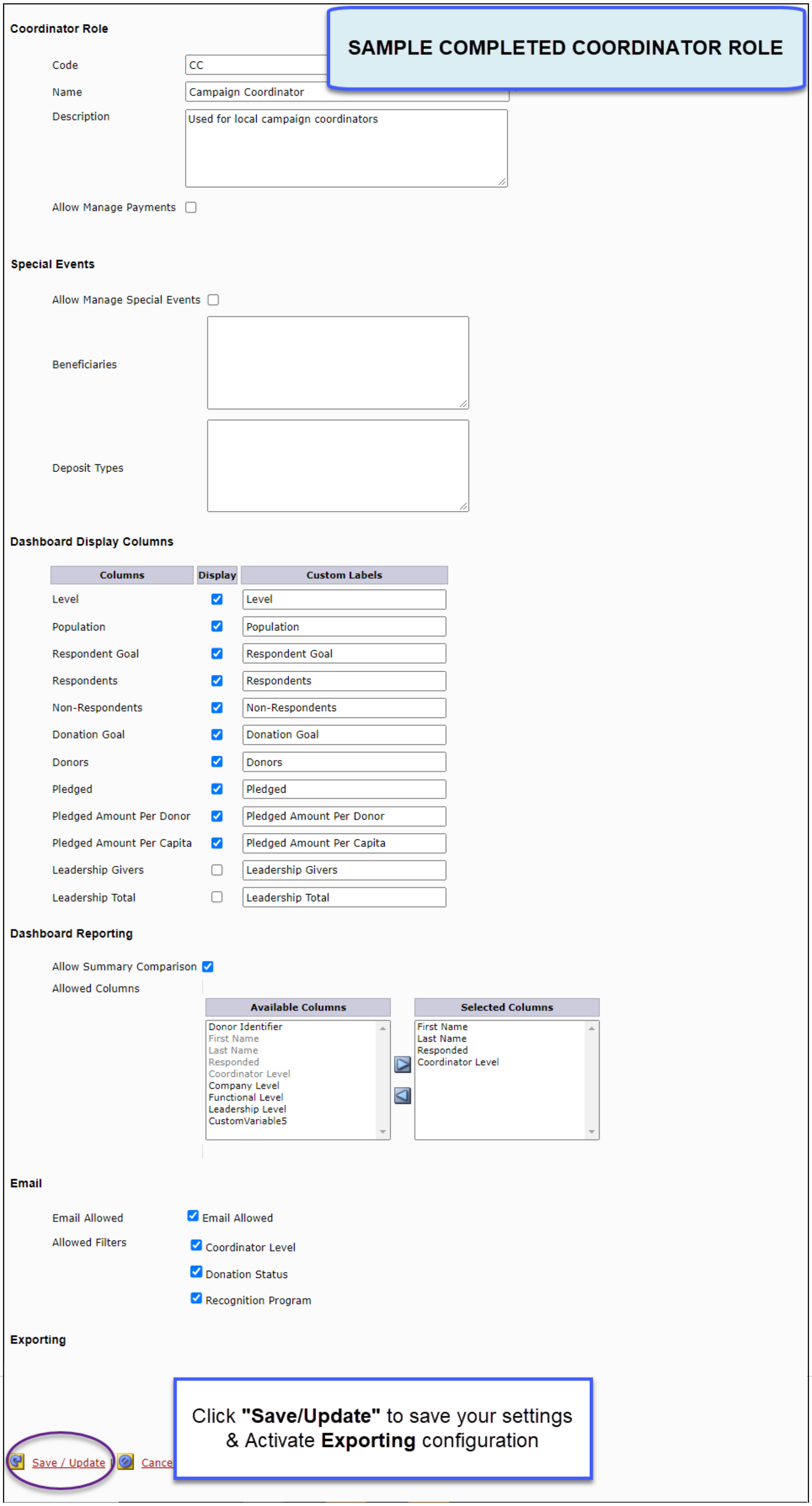
2. Enter the required and desired optional information to define the Coordinator Role. ***Note:*** Required fields are indicated by an asterisk (*).

Coordinator Role Fields		
Req	**Field**	**Description**
*	Code	This is the code associated with the coordinator role. The code is used in the Donor Import File to associate donors to the coordinator role and grant that individual access to the Dashboard.
*	Name	This is the name that will be used to identify the coordinator role.
	Description	Can be used to provide additional details.
	Allow Manage Payments	This is used to allow a coordinator to track when a donor payment is received.
	Allow Manage Special Events	This is used to allow coordinator to manage Special Event dollars raised directly from Dashboard.
	Beneficiaries	This is used in conjunction with Allow Manage Special Events to create a drop-down list of available Beneficiates to receive Special Event dollars.

Coordinator Role Fields		
Req	**Field**	**Description**
	Deposit Types	This is used in conjunction with Allow Manage Special Events to create a drop-down list to show how payment for the Special Event will be processed.
	Dashboard Display Columns	Indicates which fields will be included on the Campaign Summary visible via the Dashboard – *check the box next to the field name to include it on the summary. If desired, enter a 'custom label' that will be used as the column header for a particular field.* **Note:** By default all fields are included with system default column labels.
	Allow Summary Comparison	Determines whether the summary comparison functionality is available. This functionality allows the coordinator to select the levels they wish to compare then add them to the comparison grid for side-by-side review – *check the box to activate this feature.* **Note:** This feature is 'inactive' (unchecked) by default.
	Allowed Columns	Indicates which fields display on the report preview when 'Display Report Preview' is activated in the Coordinator Option Set. **Note:** All fields are selected by default. Follow the steps below to deselect: • In the 'Selected Columns' field highlight the field(s) you wish to deselect • Click the icon to remove them from the 'Selected Columns' list
	Email Allowed	Determines whether the email functionality is available. This functionality allows the coordinator to send emails to donors in his/her assigned coordinator level(s) - *check the box to activate this feature.* **Note:** This feature is 'inactive' (unchecked) by default.
	Allowed Filters	Indicated which filters / queries are available to the coordinator when the email functionality is activated – *check the box next to the filter name to allow that filter.* **Note:** All filters are 'active' (checked) by default.

3. Click **"Save / Update"** at the bottom of the page to save your settings and activate the **Exporting** configuration area.

Dashboard


SAMPLE COMPLETED COORDINATOR ROLE
Coordinator Role
Code
CC
Name
Campaign Coordinator
Description
Used for local campaign coordinators
Allow Manage Payments
Special Events
Allow Manage Special Events
Beneficiaries
Deposit Types
Dashboard Display Columns
Columns
Display
Custom Labels
Level
Level
Population
Population
Respondent Goal
Respondent Goal
Respondents
Respondents
Non-Respondents
Non-Respondents
Donation Goal
Donation Goal
Donors
Donors
Pledged
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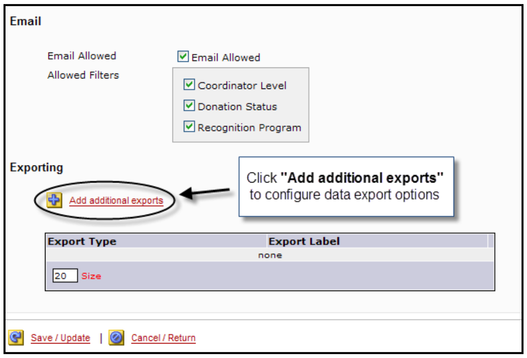
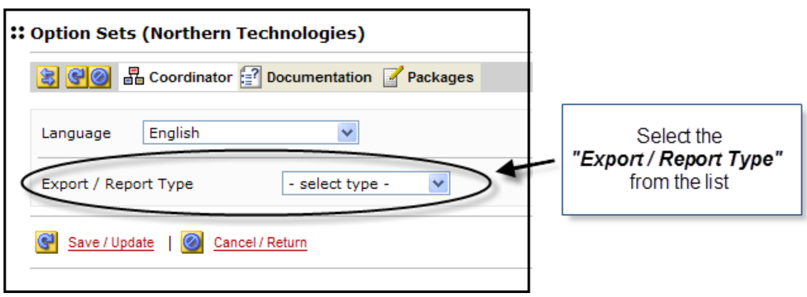
Pledged Amount Per Donor
Pledged Amount Per Donor
Pledged Amount Per Capita
Pledged Amount Per Capita
Leadership Givers
Leadership Givers
Leadership Total
Leadership Total
Dashboard Reporting
Allow Summary Comparison
Allowed Columns
Available Columns
Donor Identifier
First Name
Last Name
Responded
Coordinator Level
Company Level
Functional Level
Leadership Level
CustomVariable5
Selected Columns
First Name
Last Name
Responded
Coordinator Level
Email
Email Allowed
Email Allowed
Allowed Filters
Coordinator Level
Donation Status
Recognition Program
Exporting
Click "Save/Update" to save your settings & Activate Exporting configuration
Save / Update
Cance

4. If desired the coordinator can be given access to donor and/or donation details via the Dashboard Exporting feature. Follow the steps below to configure these optional exports.

    a. Click **"Add additional exports"**. **Note:** This link will appear at the bottom of the Coordinator Role profile page after saving a new role.



    b. Select the ***"Export / Report Type"*** from the drop-down list. Refer to the Report / Export documentation and sample exports on the User Support Site for additional information about each report option.

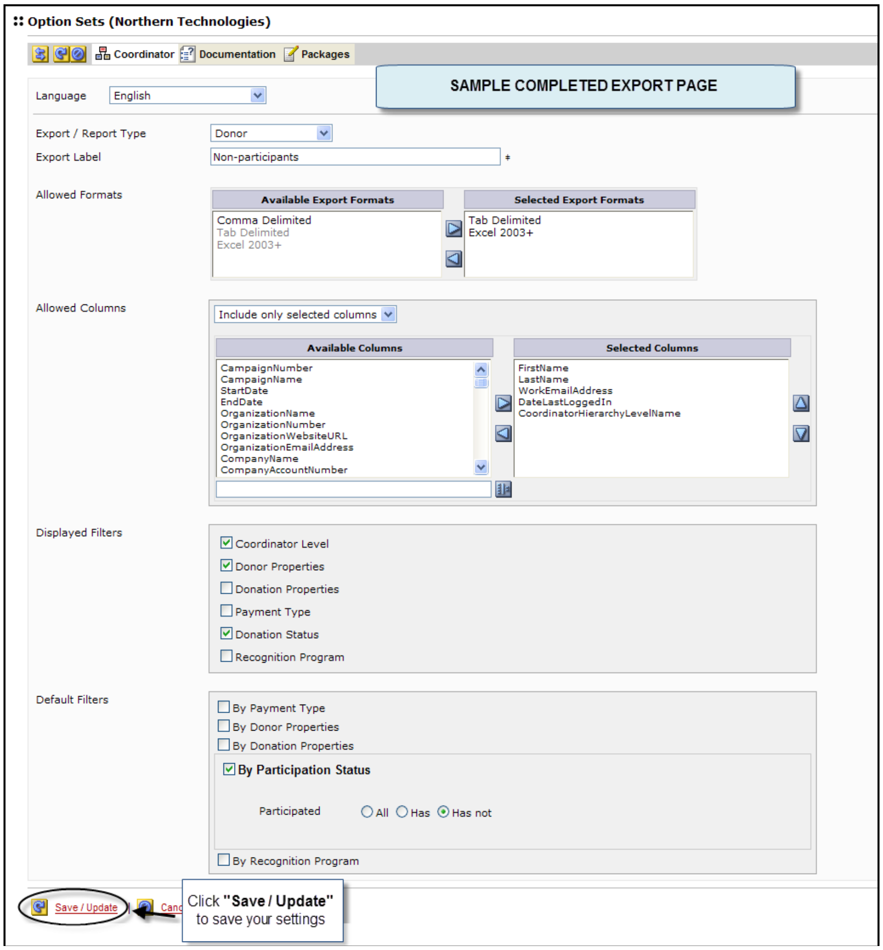


    c. Once the ***"Export / Report Type"*** is selected additional export configuration fields will appear. Enter the required and desired optional information to define the export. ***Notes:*** Required fields are indicated by an asterisk (*).

Coordinator Role Export Fields		
Req	**Field**	**Description**
	Language	**PLACEHOLDER FOR FUTURE FUNCTIONALITY**
	Export Label	Establishes a customized name for the export when viewed on the Dashboard. **Note:** If left blank the export / report type label will be used.
*	Allowed Formats	Denotes the available file format option(s). At least one format must be selected. Follow the steps below to select: • In the 'Available Export Formats' box highlight the format(s) you wish to allow • Click the icon to add them from the 'Selected Export Formats' list

Coordinator Role Export Fields		
Req	**Field**	**Description**
	Allowed Columns	Establishes what fields will be included in the export. Configuration varies based upon the type of report selected. Refer to the documentation on Exports for information on configuring exports and flexports. **Note:** The field name will be listed as "Customize Columns" if a "flexport" is selected as the Export / Report Type.
	Displayed Filters	Denotes which filters / data queries will be accessible via the dashboard – *check the box next to the desired filter names to activate them.* **Note:** By default the filters are 'inactive' (unchecked).
	Default Filters	Establishes the default data filters /queries that will be applied to the export and cannot be changed by the coordinator on the dashboard – *to activate check the box next to the desired filter name then enter the desired default value.* **Note:** By default the filters are 'inactive' (unchecked). **Note:** If the filter is included as an active "Displayed Filter" the coordinator will be able to override this default prior to generating the export. If the filter is inactive then this filter will be applied each time the export is generated.

d. Click **"Save / Update"** at the bottom of the page to save your export.



e. Repeat steps a – d to create additional exports.

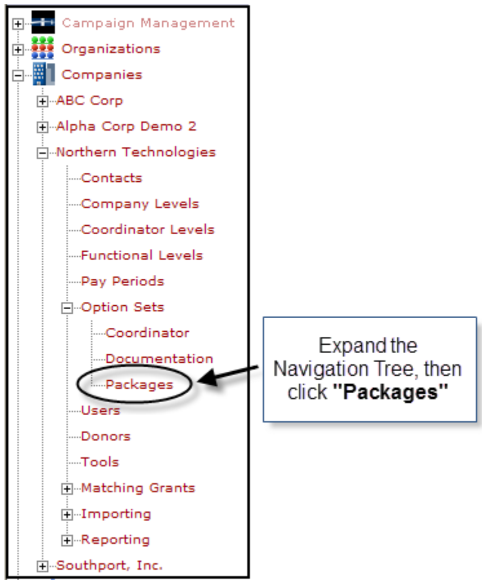
4. Add Coordinator Option Set to Company Option Package

Once created the Coordinator Option Set gets bundled into a Company Option Package. This package, and the Coordinator settings contained within it, can then be associated with one or more campaigns associated with that company.

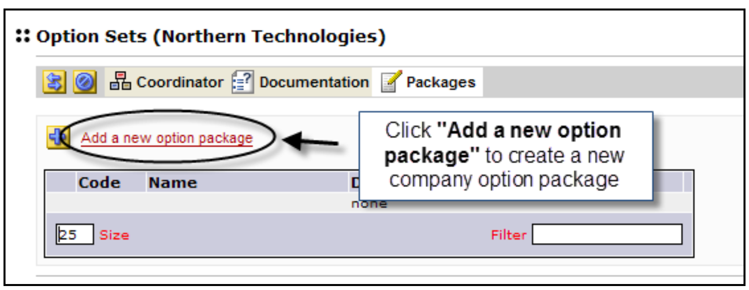
Company Option Packages are set up at the Companies level. Follow the steps below to associate the Coordinator Option Set to a Company Option Package:

1. Click the ⊞ next to **Option Sets** to expand the navigation tree.

2. Click **Packages** to access the ***Company Option Packages*** page.



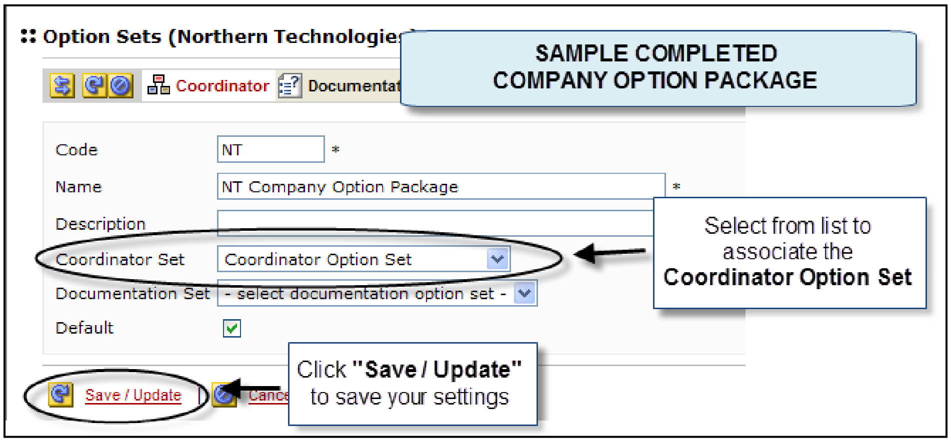
3. Click **"Add a new option package"**.



4. Enter the required and desired optional information to define the Company Option Package. ***Note:*** Required fields are indicated by an asterisk (*).

Coordinator Role Fields		
Req	**Field**	**Description**
*	Code	This is the code associated with the company option package.
*	Name	This is the name that will be used to identify the company option package.
	Description	Can be used to provide additional details.
*	Coordinator Set	Denotes the Coordinator Option Set associated with the Company Option Package – *select the Coordinator Option Set from the drop down list.*
	Documentation Set	**ADVANCED FUNCTIONALITY –** This setting does not impact the configuration or use of the Dashboard. This is additional functionality for use by FrontStream in conjunction with Where Raised Reporting.
	Default	Denotes if this Company Option Set should be used as the default setting for campaigns managed under this company – *only check this box if this option set is to be the default for all campaigns.*

5. Click **"Save / Update"** to save your settings.



5. Associate Company Option Package to Campaign

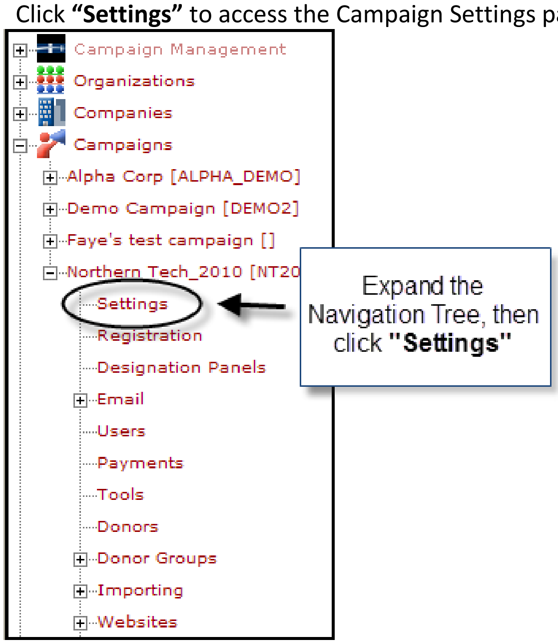
Once created the Company Option Package needs to be associated to the Campaign. This is done in the **Campaign Settings** located at the Campaigns level.

1. Click Campaigns on the Navigation Tree to access the **Campaign List** .

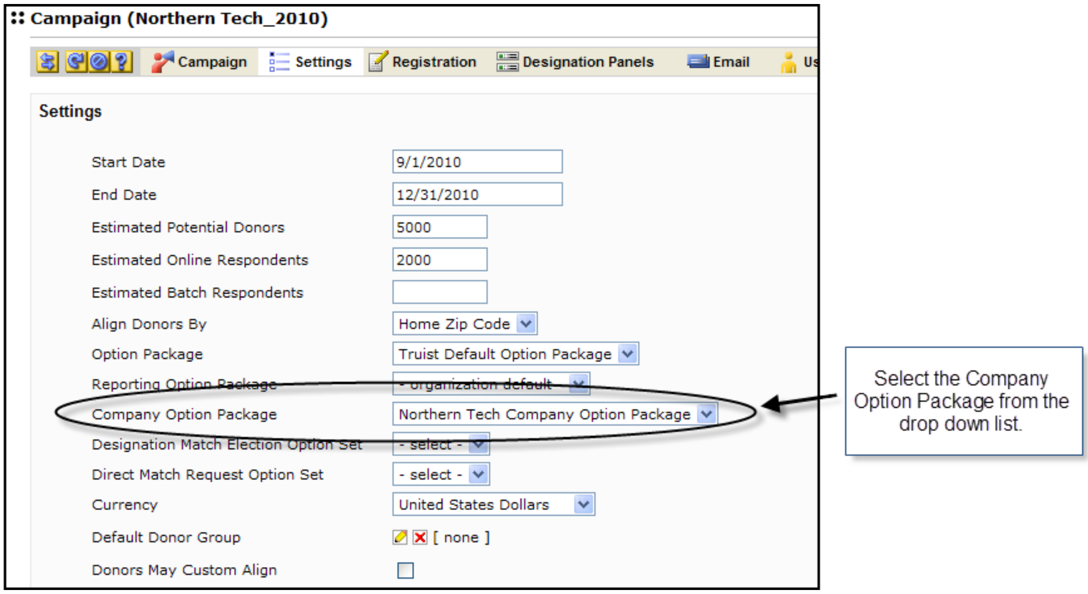
2. Locate your campaign in the list then click the icon next to the campaign name.

3. From the campaign profile page, click the icon to expand the Navigation Tree.

4. Click **"Settings"** to access the Campaign Settings page.



5. Set the **"Company Option Package"** to the company option package containing your desired coordinator option set.



6. Click **"Save / Update"** at the bottom of the page.

6. Assign Coordinator Role to Donor

Donors that are also Coordinators for the campaign are assigned a Coordinator Role, Reporting Coordinator Level and optionally a Summary Coordinator Level. These coordinator settings taken together define the donor's Dashboard user experience and available data.

- **Coordinator Role:** A set of permissions that determines the summary data, exports and email capabilities available to the coordinator via the Dashboard. See ***Step 3: Configure Coordinator Roles*** above for additional details.

- **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.

These settings are configured at the Campaigns level and can be set manually via the **Donor Settings** page or via a Donor Import file. Below are step-by-step instructions for manually setting the coordinator settings.

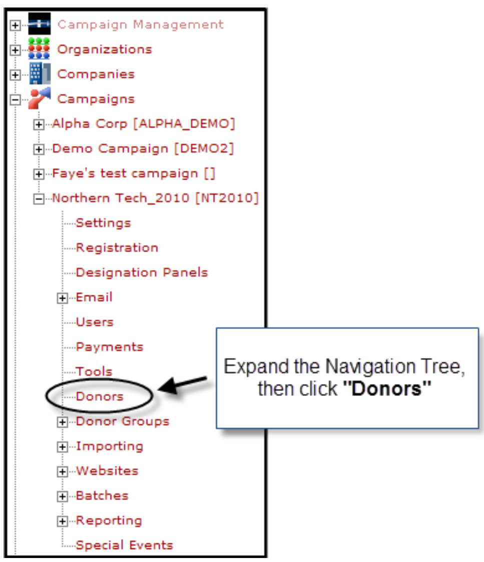
Note: For companies with a large number of coordinators it is recommended that the Coordinator Settings be established via a Donor file import. The associated fields in the Donor file are: #69 – Coordinator Hierarchy Role Code, #77 – Coordinator Hierarchy Reporting Code, #95 – Coordinator Summary Code. Refer to the Donor Import file specification and file import help documentation for additional details.

1. Click Campaigns on the Navigation Tree to access the **Campaign List**.

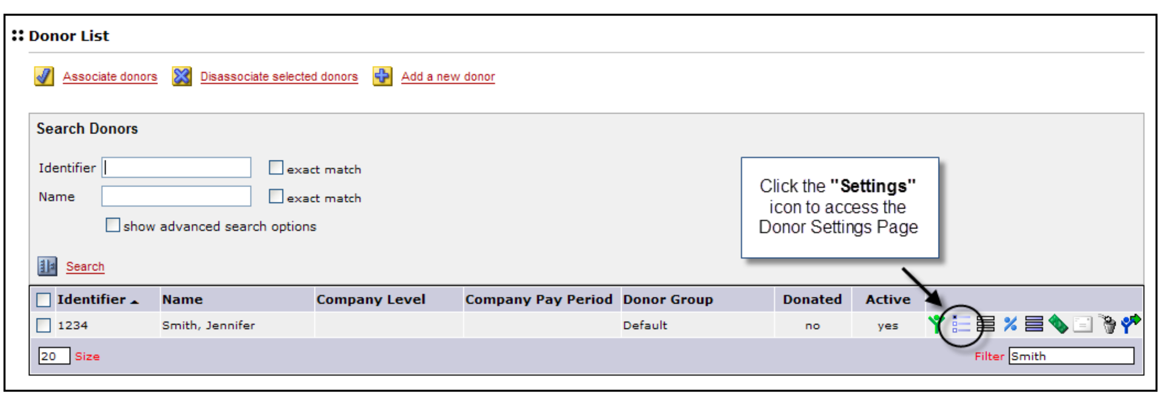
2. Locate your campaign in the list then click the icon next to the campaign name.

3. From the campaign profile page, click the icon to expand the Navigation Tree.

4. Click **"Donors"** to access the Donor List page.



5. Click the icon next to the donor name for which you wish to grant Dashboard / Coordinator access to access the **Donor Settings** page.

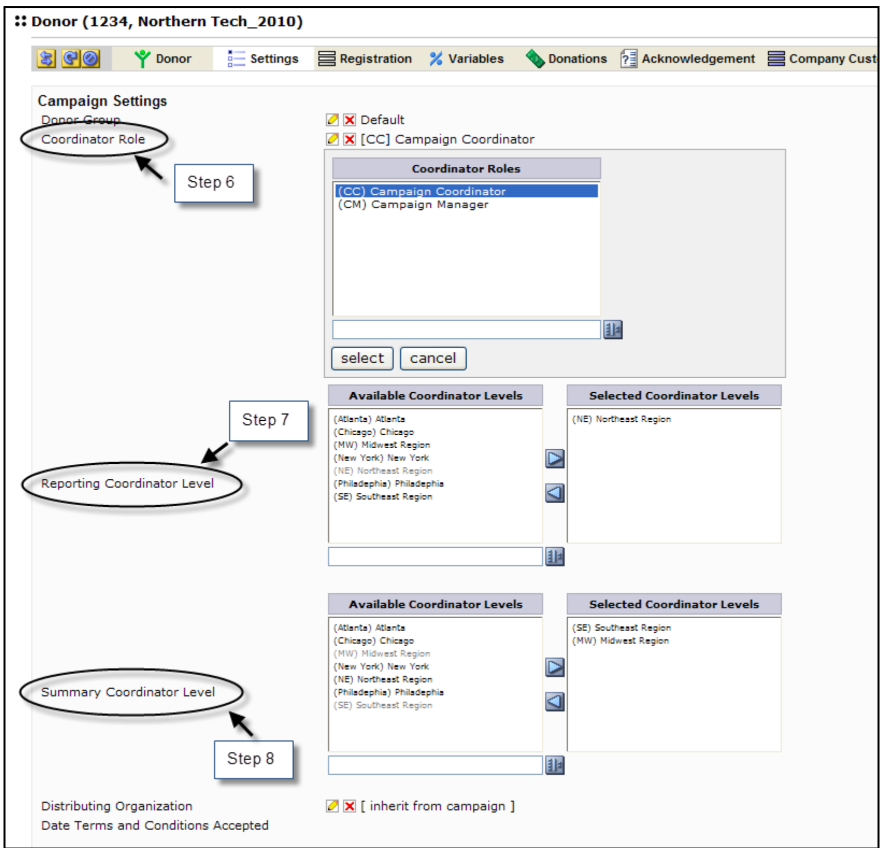


6. Associate the donor to a ***"Coordinator Role"***.

a. Click the icon to view the list of available roles.
b. Highlight the appropriate role with the ***Coordinator Roles*** box.
c. Click **"Select"** to save your selection.

7. Associate the donor to the appropriate **"Reporting Coordinator Level".**
   a. Highlight the appropriate level(s) in the 'Available Coordinator Level' box
   b. Click the icon to add them from the 'Selected Coordinator Level' list

8. If applicable, associate the donor to the appropriate **"Summary Coordinator Level".**
   a. Highlight the appropriate level(s) in the 'Available Coordinator Level' box
   b. Click the icon to add them from the 'Selected Coordinator Level' list



9. Click **"Save / Update"** at the bottom of the page to save your settings.

7. Assign a Default Coordinator Level to Campaign (Optional)

A default coordinator level can be assigned to a campaign to automatically align a donor either via import or self-registration to a Coordinator Level.

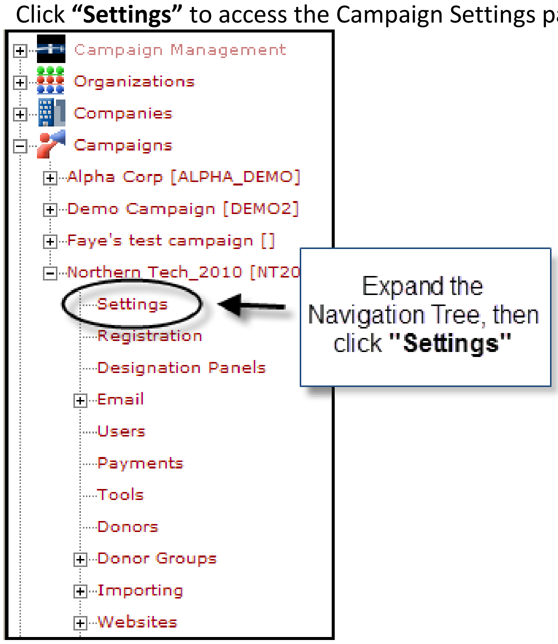
Set the **Default Coordinator Level** this is done in the **Campaign Settings** located at the Campaigns level.

7. Click Campaigns on the Navigation Tree to access the **Campaign List** .

8. Locate your campaign in the list then click the icon next to the campaign name.

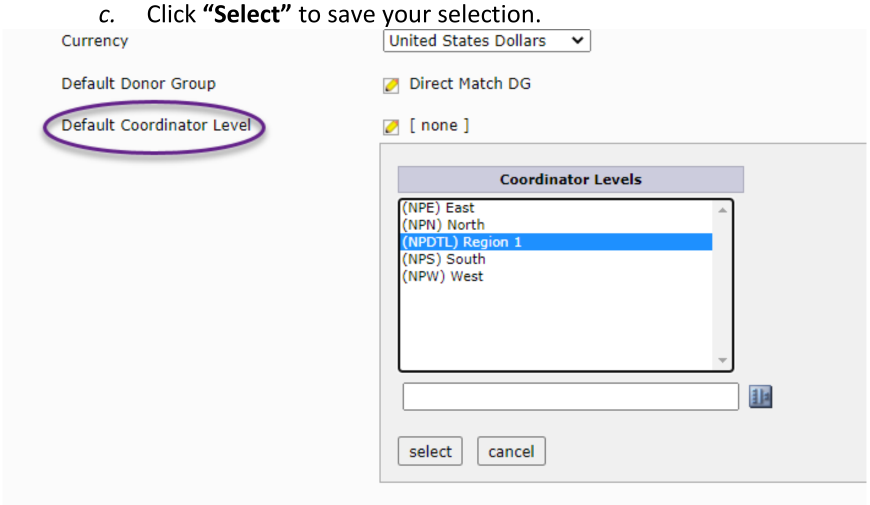
9. From the campaign profile page, click the icon to expand the Navigation Tree.

10. Click **"Settings"** to access the Campaign Settings page.



11. Set the **"Default Coordinator Level"**

    a. Click the icon to view the list of available ***Coordinator Levels***.
    b. Highlight the appropriate coordinator level with the ***Coordinator Level*** box.
    c. Click **"Select"** to save your selection.



12. Click **"Save / Update"** at the bottom of the page to save your settings.

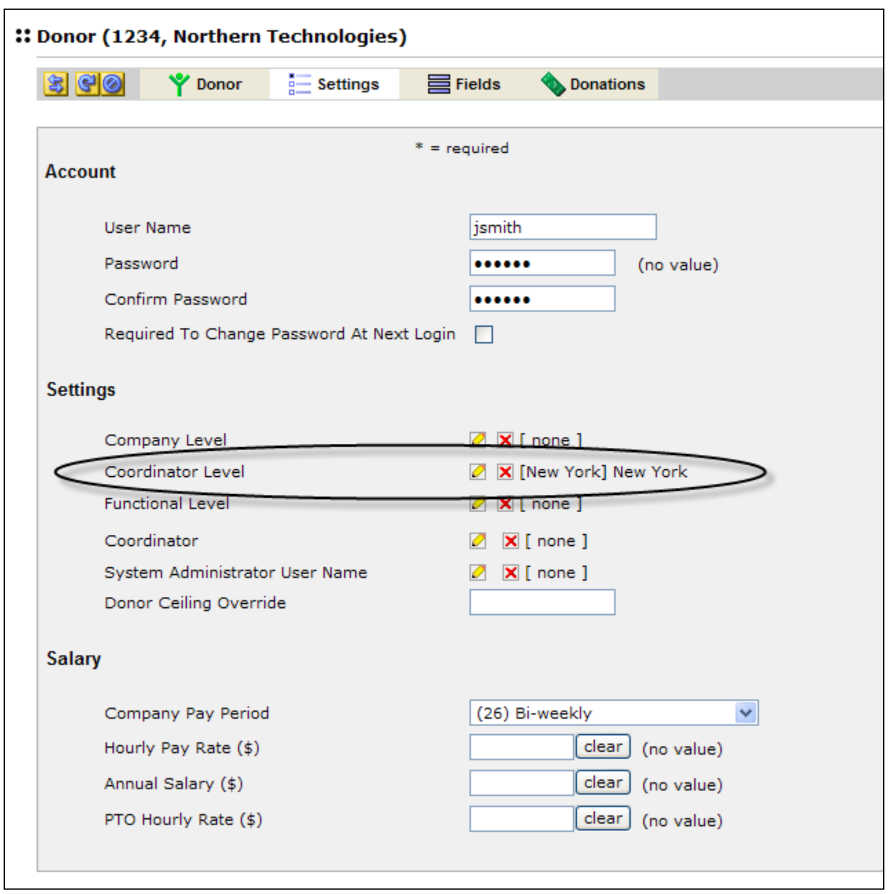
8. Associate Donors with Coordinator Level

Donors must be assigned to a Coordinator Level in order to be included in the Dashboard reports. Donor can be assigned to a coordinator level via a donor import, manually via **Donor Settings** page, or by setting a Default Coordinator Level in **Campaign Settings.** ***See step 7 Assign a Default Coordinator Level to a Campaign (Optional)*** for more information on assigning a default coordinator level.

The Donor Coordinator Level can be set at either the Campaigns or Companies level. While the Coordinator Level can be set manually via the **Donor Settings** page, associating donors via a Donor Import file is highly recommended as it is more efficient.

To associate the donor to a Coordinator Level the corresponding "***Coordinator Level Code"*** should be included as field ***#38 – Coordinator Hierarchy Level Code*** in the Donor Import file. Refer to the Donor Import file specification and file import help documentation for additional details.

If you wish to view or edit an individual's Coordinator Level, you can do this via the **Donor Settings** page located at either the Campaigns or Companies level. Below is a screen shot showing that setting.



This screenshot is taken from the company level donor view. The view at the campaign level will be different.

When using the optional **Default Coordinator Level** donors that are not aligned to a Coordinator Level as outlined above are aligned as follows:

- In a self-registration campaigns the donor is associated to the ***Default Coordinator Level*** upon completing their online registration.
- Imported donors are associated to the **Default Coordinator Level** at time of import if field ***#38 – Coordinator Hierarchy Level Code*** in the Donor Import file.
- Donor manually associated to the campaign that have not been aligned to a ***Coordinator Level*** will be associated to the ***Default Coordinator Level*** upon submitting a pledge.