

Reporting In
The Raiser's Edge 7
Wednesday – July 15, 2009

Blackbaud Representative:

Ron Rivers – **Solutions Engineer**

Agenda



- Welcome and Introductions
- Resources (Handout Downloads)
- Reports Facility (Optional Modules)
- Homepage (Report Favorites)
- Summaries vs. Reports vs. Dashboards
- Report and/or Summary Options
- Standard Reports and Descriptions
- Customizable Reports
- Blackbaud News and Updates
- Q & A

Resources

From within the software: Select Help, User Guides, Reports

- **Reports Guide** - The Reports Guide includes detailed descriptions of each report, procedures for running reports, detailed explanations of parameter tabs and each item on the tabs, and tutorials.

- **Sample Reports Guide** - The Sample Reports Guide includes descriptions of each report along with a sample of each and the parameter tab settings used to generate that report.

- **Summaries Guide** - The Summaries Guide provides instructions for creating summaries to track the performance of your organization's solicitors, campaigns, funds, and appeals and to view a constituent's giving history.

From Blackbaud Web Site:

<http://www.blackbaud.com/support/guides/re7.aspx>

Home Page Favorites

The screenshot shows the 'The Raiser's Edge' application window. The main content area is titled 'Welcome Ron Rivers' and features a 'Customize Home Page' section. Below this, there is a 'Quick Find Constituent' search bar and a 'Favorites' section. The 'Favorites' section is organized into several folders: 'Constituents', 'Lists', 'Prospect Research Reports', and 'Membership Management'. Each folder contains various reports and documents, such as 'Create a new gift', 'Acquisition, Cultivation & Retention', 'Outstanding Proposal Report', and 'Honor/Memorial Gifts'. At the bottom of the main content area, there is an 'Action Reminders' section with a table listing upcoming actions.

Follow-up?	Complete	Date	Category	Action Type	Constituent/Event/Appeal	Phone	Email	Solicitor Name
	<input type="checkbox"/>	07/15/2009	Mailing	Brochure Request	Bruce Willis	898-234-0987	bruce@aol.com	Crenshaw, Ellen
	<input type="checkbox"/>	07/15/2009	Meeting	Follow-Up Facility Visit/Tour	Ronald Rivers	843-216-6200	ron.rivers@blackbaud.com	Tidwell, Andrea
	<input type="checkbox"/>	07/15/2009	Phone Call	Follow-Up	Kathleen Bentley	404-864-2522	KatBentley@yahoo.com	Hernandez, Robert
	<input type="checkbox"/>	07/15/2009	Meeting	Initial Facility Visit/Tour	Joseph Ames	205-566-1254	JPdiresta@net.com	Hensley, Cole
	<input type="checkbox"/>	07/15/2009	Phone Call	Return Referral	Warren Buffett	619-402-5589	wbuffett@comcast.net	Ames, Joseph
	<input type="checkbox"/>	07/15/2009	Phone Call	New Request	Dan Mombrea	843-224-9325	dan.mombrea@blackbaud.com	Anderson, Matthew
	<input type="checkbox"/>	07/15/2009	Meeting	Initial Facility Visit/Tour	Susan Keating	987-795-1675	skeating@roadrunner.com	Andrews, Allison
	<input type="checkbox"/>	07/15/2009	Meeting	Application Review Process	Alexander Home	802-771-4587	alex.home@snat.net	Hunter, Earl

Standard vs. Additional Reports

The screenshot shows a web browser window titled "The Raiser's Edge" with a menu bar (File, Edit, View, Go, Favorites, Tools, Help) and navigation buttons (Back, Forward, Open in separate window). The page content is divided into a left sidebar, a central "Reports" section, and a right-hand list of report categories.

Left Sidebar (Navigation):

- Home
- Records
- Query
- Export
- Reports
- Mail
- Batch
- Mapping
- Admin
- Config
- Scanning
- NetSolutions
- Dashboard
- AuctionMaes... Pro Integration
- CounterPoint SQL Integration
- Data Health Center
- Web Services

Central "Reports" Section:

- Reports
 - Action Reports
 - Analytical Reports
 - Campaigns, Funds, and Appeals Reports
 - Custom Reports
 - Demographic and Statistical Reports
 - Event Management Reports
 - Financial Reports
 - Membership Reports
 - Pivot Reports
 - Pledge and Recurring Gift Reports
 - Profiles, Lists, and Directories
 - Prospect Research Reports
 - Tribute Reports
 - Volunteer Reports

Right-Hand List of Report Categories:

- ▶ Action Reports
- ▶ Analytical Reports
- ▶ Campaigns, Funds, and Appeals Reports
- ▶ Custom Reports
- ▶ Demographic and Statistical Reports
- ▶ Event Management Reports
- ▶ Financial Reports
- ▶ Membership Reports
- ▶ Pivot Reports
- ▶ Pledge and Recurring Gift Reports
- ▶ Profiles, Lists, and Directories
- ▶ Prospect Research Reports
- ▶ Tribute Reports
- ▶ Volunteer Reports

Additional text in the browser window includes "(Build 5026) Blackbaud Demo" in the top right and "Welcome to The Raiser's Edge 7" at the bottom left.

Samples and Descriptions

The screenshot displays the 'The Raiser's Edge' software interface. The main window shows the 'Reports > Analytical Reports' section. A sidebar on the left contains navigation icons for Home, Records, Query, Export, Reports, Mail, Batch, Mapping, Admin, Config, Scanning, NetSolutions, Dashboard, AuctionMaes... Pro Integration, CounterPoint SQL Integration, Data Health Center, and Web Services. The 'Reports' sidebar lists various report types, with 'LYBUNT Report' selected. The main content area shows a list of report names, including 'Rob's LYBUNT', 'LYBUNT for Tickets or donations', 'Annual LYBUNT Report', 'Members-donated last year but not this year', 'LYBUNT - Gave Last Year but not This Year', 'Has Not Paid Dues This Year - Paid Last Year', 'Association Donors Last Year But Not This Year', 'THANC Foundation LYBUNT', 'Meyer Center for Special Children LYBUNT', 'Blood Water Mission LYBUNT', '16:15 LYBUNT', 'Atlantic City LYBUNT (Last Six Months)', and 'Blackbaud Sample LYBUNT Report'. A preview window titled 'Lybunt.pdf - Adobe Reader' is open, showing a table of LYBUNT report data.

Contributor Name	Fund	LYBUNT	Total Given LYBUNT
Jerry R. A. Smith 420 Stone Court Baltimore, MD 21214	Aggression Fund	37,000.00	01/01/2005 - 37,000.00
Spencer Southall 877 W. Johnson Lane Chickasha, OK 73015	Richard W. Kelly Memorial Fund	32,500.00	01/01/2005 - 32,500.00
Chris A. Hill 1100 Bryn Mawr Court Atlanta, GA 30328	1000 Annual Fund	31,000.00	01/01/2005 - 31,000.00
Harold R. Pease 158 Clarendon Drive Chickasha, OK 73015	President's Development Fund	31,000.00	01/01/2005 - 31,000.00
Robert Shanks 1500 W. 11th St Birmingham, AL 35211	1000 Annual Fund	30,000.00	01/01/2005 - 30,000.00
John T. Smith 611 Wood Road Lanham, MD 20641	Richard W. Kelly Memorial Fund	37,000.00	01/01/2005 - 37,000.00
Total of 6 Contributors		215,000.00	215,000.00

Below the report list, there is a checkbox labeled 'Only show my reports'. At the bottom of the interface, a message states: 'The LYBUNT (Last Year But Unfortunately Not This) Report locates those individuals who donated last year, but not during the specified date range. Click [here](#) for more information about this report.' Below this message is a link for 'View Samples'.

Customizable Reports

Reports that offer completely customizable columns, column widths, column headings, and ordering of columns:

- *Gift Detail and Summary*
- *Constituent Giving History*
- *Pledge Cash Flow*
- *Pledge But Not Paid*
- *Pledge Past Due*
- *Pledge Status*
- *Pledge Activity*
- *Annual Statement*
- *Recurring Gift Amendment*
- *Recurring Gift Missing Payment*
- *Planned Gifts*

Custom Columns, Headings & Ordering

The screenshot displays the 'The Raiser's Edge' software interface. The main window shows a list of reports under 'Reports • Financial Reports'. The 'Constituent Giving History' report is selected. A dialog box titled 'Constituent Giving History' is open, showing the configuration for this report. The dialog includes a table of columns and a list of available fields.

Available Fields:

- Acknowledge
- Acknowledge Date
- Appeal ID
- Balance
- Batch Number
- Campaign ID
- Constituent Code
- Date 1st Pay
- Fund ID
- Gift Code
- Gift ID
- Gift Status

Selected Columns:

Default Column Name	Custom Column Hea...	Min. Width ...
Gift		0.75
Date		1.00
Campaign Description		1.00
Fund Description		1.25
Appeal Description		1.00
Solicitor Names		1.00

Total Report Width: 9.00

Report Orientation: Portrait Landscape

Buttons: Restore Defaults, < Back, Next >, Cancel, Print, Preview, Layout

At the bottom of the dialog, there is a note: "The Constituent Giving History provides a detailed listing by constituent of all gifts given within a date range. Click [here](#) for more information about this report." Below this note is a link for "View Samples".

Summaries vs. Reports vs. Dashboards

- **Summaries:** For creating summaries to track the performance of your organization's solicitors, campaigns, funds, and appeals and to view a constituent's giving history. Volunteer, Prospect, Membership, and Event Summaries are available. Quick snapshots available from the records themselves within RE7.
- **Reports:** The standard canned reports of RE7
- **Dashboards:** High-level overview reports – most modules have their own specific set of dashboards (these can be added to the Home Page – Select *Tools, User Options, Home Tab, Panels*)

Report and/or Summary Options

The screenshot displays the 'The Raiser's Edge' application window. The main menu on the left includes Home, Records, Query, Export, Reports, Mail, Batch, Mapping, Admin, Config, Scanning, NetSolutions, Dashboard, AuctionMaes... Pro Integration, CounterPoint SQL Integration, Data Health Center, and Web Services. The 'Reports' section is expanded to show 'Financial Reports', which includes sub-categories like Action Reports, Analytical Reports, Campaigns, Funds, and Appeals Reports, Custom Reports, Demographic and Statistical Reports, Event Management Reports, Financial Reports (selected), Membership Reports, Pivot Reports, Pledge and Recurring Gift Reports, Profiles, Lists, and Directories, Prospect Research Reports, Tribute Reports, and Volunteer Reports.

The 'Financial Reports' list includes: Account Distribution Report, Adjusted Gift Report, Annual Statement Report (highlighted), Cash Receipts Journal, Constituent Giving History, EFT Participation Report, General Ledger Audit Report, Gift Detail and Summary Report, Gift Entry Validation, Gifts-in-Kind Report, Matching Gift Report, Other Gifts Report, and Stock Gain/Loss Report.

The 'Annual Statement Report' configuration window is open, showing a table of reports:

Name	Date Created	Created By
Annual Tax Statements	06/27/2003 10:02:13 AM	Supervisor
Annual Statement Report for Taxes	10/08/2003 3:07:58 PM	Supervisor

The configuration window for 'Robert Hernandez Tax Statement' includes the following options:

- Include... Hernandez, Robert**
- Include Gifts with these Dates:**
 - Date to use: Gift date
 - Date: Last calendar yr
- Soft Credit Gifts To:**
 - Donor
 - Soft credit recipients (Use distribution on gift)
 - Both (Use distribution on gift)
- Include these Constituents:**
 - Inactive constituents
 - Deceased constituents
 - Constituents with no valid addresses
- Credit Matching Gifts To:**
 - Donor
 - MG Company
 - Both
- Create Gift output query

Buttons at the bottom of the configuration window include < Back, Next >, Cancel, Print, Preview, and Layout.

At the bottom of the main window, an information icon is followed by the text: "The Annual Statement Report provides a statement for each constituent reviewing receipt information for tax purposes. Each Constituent will print on a separate page. Click [here](#) for more information about this report." Below this is a "View Samples" link.

The status bar at the bottom left reads "Welcome to The Raiser's Edge 7".

Combined Summary and Detail Reports

The screenshot displays the 'The Raiser's Edge' software interface. The main window is titled 'Reports • Analytical Reports' and contains a list of report categories on the left and a list of reports in the center. A 'Donor Category Report' configuration window is open, showing various options for including records and constituents. The configuration window includes sections for 'Include...', 'Include Gifts with these Dates', 'Soft Credit Gifts To', 'Include these Constituents', 'Credit Matching Gifts To', and 'Report Type'. The 'Report Type' is set to 'Both'. The main window also shows a table of reports with columns for Name, Date Created, and Created By.

Reports

- Action Reports
- Analytical Reports
- Campaigns, Funds, and Appeals Reports
- Custom Reports
- Demographic and Statistical Reports
- Event Management Reports
- Financial Reports
- Membership Reports
- Pivot Reports
- Pledge and Recurring Gift Reports
- Profiles, Lists, and Directories
- Prospect Research Reports
- Tribute Reports
- Volunteer Reports

Name	Date Created	Created By
2002 Supporters	01/30/2003 7:51:20 AM	Supervisor
2002 Gold Circle Club Members		
Donors Categorized by Giving Club		
Donor Category Report LAST Year		
Donor Category Report THIS Year		
Bearing Fruit Donor Category Report		
Blackbaud Donor Category Report		
Donor Category Report		
Criswell Donor Category Report		

Donor Category Report Configuration

1: General 2: Filters 3: Gift Types 4: Attributes 5: Ind. Address 6: Org. Address 7: Format

Include... All records

Include Gifts with these Dates:
Date to use: Gift date
Date: Last calendar yr

Soft Credit Gifts To:
 Donor
 Soft credit recipients Use distribution on gift
 Both Use distribution on gift

Include these Constituents:
 Inactive constituents
 Deceased constituents
 Constituents with no valid addresses

Credit Matching Gifts To:
 Donor MG Company Both

Report Type:
 Detail Summary Both

Create output query

< Back Next > Cancel Print Preview Layout

Only show my reports

The Donor Category Report divides your Constituents into giving clubs based on total given within a specified period of time. Click [here](#) for more information about this report.

[View Samples](#)

Sample Output Query

The screenshot displays the Blackbaud software interface within a browser window titled "The Raiser's Edge". The main menu includes "File", "Edit", "View", "Go", "Favorites", "Tools", and "Help". The left sidebar contains navigation options: Home, Records, Query, Export, Reports, Mail, Batch, Mapping, Admin, Config, Scanning, NetSolutions, Dashboard, AuctionMaes... Pro Integration, CounterPoint SQL Integration, Data Health Center, and Web Services. The central area shows "Reports • Analytical Reports" with a list of report types, including "LYBUNT Report".

Two dialog boxes are open over the main interface:

- Blackbaud Sample LBUNT Report**: This dialog has tabs for "General", "Filters", "Gift Types", "Attributes", "Ind. Address", "Org. Address", and "Format". The "General" tab is active, showing options for "Include..." (set to "All records"), "Date to use:" (set to "Gift date"), and "Date:" (set to "Last calendar yr"). It also includes sections for "Soft Credit Gifts To" (with "Donor" selected) and "Credit Matching Gifts To" (with "MG Company" selected). A checkbox "Create Gift" is checked, and a dropdown menu is set to "Gift". Buttons for "< Back", "Next >", "Cancel", "Print", "Preview", and "Layout" are visible at the bottom.
- Save Static Query**: This dialog prompts for a "Query name:" (set to "Sample Output Query") and a "Description:". It includes "Save" and "Cancel" buttons. Below, it shows "Query format:" set to "Static" and "Query Type:" set to "Gift". Two checkboxes are checked: "Other users may execute this query" and "Other users may modify this query". The "Created From:" field is set to "Reports - Blackbaud Sample LBUNT Report". A "Create in:" dropdown is set to "General", with a "New Category" button next to it.

At the bottom of the interface, a message states: "The LYBUNT (Last Year But Unfortunately Not This) Report locates those individuals who donated last year, but not during the specified date range. Click [here](#) for more information about this report." Below this message is a "View Samples" link.

Queries and Export

Board of Directors - The Raiser's Edge

File Edit View Format Records Favorites Tools Help

1:Criteria | 2:Output | 3:Sort | 4:Results

Why are there duplicates in my query results?

Name	Constituency Code	Birth Date	Last Name	Total Number of Gifts	Total Amount of Gifts
Julie M. Bach	Board of Directors	03/27/1970	Bach	16	\$4,070.00
Benjamin E. Connor	Board of Directors	01/29/1965	Connor	22	\$6,440.00
Zoe Cruz	Board of Directors		Cruz	3	\$275.00
Nicole M. Dustin	Board of Directors	09/01/1944	Dustin	16	\$2,805.00
Jill Garrett	Board of Directors		Garrett	3	\$400.00
Joe Jones	Board of Directors	04/05/1969	Jones	3	\$700.00
Jennifer A. Kovalak	Board of Directors	02/01/1944	Kovalak	19	\$18,825.00
Drla A. McGrann	Board of Directors	08/07/1949	McGrann	16	\$4,506,340.00
Barrett J. O'Malley	Board of Directors	01/25/1970	O'Malley	19	\$6,890.00
Nancy R. Peters	Board of Directors	03/22/1955	Peters		
Jeanie Picardi	Board of Directors	09/04/1989	Picardi		
Ira M. Rosenberg	Board of Directors	11/06/1960	Rosenbe		
John T. Smith	Board of Directors	03/06/1953	Smith		
Ellen Smith	Board of Directors	04/12/1955	Smith		
Rick Smith-Beachum	Board of Directors	10/03/1965	Smith-Be		
Mary A. Smoak	Board of Directors	12/24/1959	Smoak		
Tenli Smyth	Board of Directors	11/05/1958	Smyth		
Daniel R. Snyder	Board of Directors	05/12/1968	Snyder		
Shaun Sullivan	Board of Directors		Sullivan		
Stella S. White	Board of Directors	02/12/1968	White	6	\$2,690.00

Export

Export file type: Excel 4.0 (XLS)

Export file name: C:\DOCUMENTS AND SETTINGS\RONRIVERS\MY D ...

Include header

Export Now Cancel

< Back Next > Cancel

Run Now

20 records 07/15/2009

Custom Crystal Reports

Crystal Reports for Blackbaud - [AWAIC Quarterly Donations.rpt]

File Edit View Insert Format Database Report Analyzer Window Help

08/03/2007 20:06 1 of 1

AWAIC Donations - 1st Quarter 2007

Date	Constituent/Organization	Gift Type	Gift Amount
January 2007			
01/02/2007	Orla A. McGrann	Cash	\$1,500,000.00
01/02/2007	AAA Concrete	Cash	\$1,500,000.00
01/05/2007	Joseph P. Ames	Recurring Gift Pay-Cash	\$200.00
01/11/2007	Warren E. Buffett	Cash	\$500,000.00
01/12/2007	ABC Jewelry Company	Cash	\$75.00
01/15/2007	Cynthia T. Miller	Cash	\$1,000.00
01/19/2007	Michael Dell	Cash	\$250,000.00
February 2007			
02/01/2007	Allison E. Andrews	Cash	\$75.00
02/08/2007	Barrett J. O'Malley	Cash	\$75.00
02/09/2007	Erin Andrews	Recurring Gift Pay-Cash	\$100.00
02/13/2007	Chloe V. Ohar	Cash	\$2,000.00
02/14/2007	Julie M. Bach	Cash	\$2,500.00
02/16/2007	Robert C. Hernandez	Cash	\$1,000.00
02/16/2007	The James Gruber Foundation	Cash	\$10,000.00
02/20/2007	Ronald S. Rivers	Cash	\$1,000.00
			\$3,751,275.00

Field Explorer

- Database Fields:
 - Gf
 - GfAtr
 - GfAttrCat_1
 - GfCn
 - GfCnBio
 - GfNote_1
 - GfTr_1
- Formula Fields:
- Parameter Fields:
- Running Total Fields:
- Group Name Fields:
 - Group #1 Name: Gf.Gf_Date
- Special Fields:

Close Help

Records: 21 100%

Blackbaud News and Updates

Upcoming Online User Clinics

- ◆ Reporting in The Raiser's Edge 7 7/15/2009
- ◆ Homepage and Dashboards 8/19/2009
- ◆ Tracking Solicitors and Appeals 9/16/2009
- ◆ Importing 10/21/2009
- ◆ Mail Merge 11/18/2009
- ◆ Security in The Raiser's Edge 12/16/2009

Web Seminar schedule:

www.blackbaud.com – Events, Web Seminars

Questions: please email webseminars@blackbaud.com.

Blackbaud News and Updates

Upcoming Web Seminars

- ◆ Intro to BBNC GROW 7/22/2009
- ◆ Intro to Financial Edge for Raiser's Edge Customers 7/14/2009
- ◆ Building and Managing an Interactive Website 7/7/2009
- ◆ Blackbaud NetCommunity for... July
 - Cause-Based and Service Organizations
 - Faith-based Organizations
 - Healthcare organizations
 - Higher Education Institutions

Web Seminar schedule:

www.blackbaud.com – Events, Web Seminars

Questions: please email webseminars@blackbaud.com.

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Questions?

For more information:

Contact your account manager

Phone: 800-443-9441

Email:

solutions@blackbaud.com

Thank You for joining us!

