



Report Best Practices and Tips

This document describes some best practices for running reports in Raiser's Edge. You may contact Advancement Services at REHelp@seattleu.edu with any reporting questions.

Should you run the report or request it from Advancement Services?

Many reports are available for you to run for yourself on demand. You can create reports yourself or ask Advancement Services to create one for you. Although you should try to be as self sufficient as possible, there are times when you must ask Advancement Services to run reports for you. Advancement Services must pull your report if:

- Your report or contents of your report will be published – in print or online.
- Your report or contents of your report will be used/viewed in a presentation external to University Advancement (Board of Trustee/Regent meetings for example).

Report Naming Conventions:

When creating new reports, use our report naming conventions. Doing so will help you and fellow staff members find your reports for use in the future. Our convention is as follows:

<Departmental Prefix> - <Short Description of Report>

For example, an Arts and Sciences cash only donor report for last fiscal year could be called:
"A – Cash In The Door Last FY"

Departmental Prefixes are the same ones we use for Queries. Find them here:

<http://www.seattleu.edu/WorkArea/linkit.aspx?LinkIdentifier=id&ItemID=59763>

The Short Description of Report should provide enough of a description to let you or another know what the report is intended to do.

Report Date Ranges:

Most reports ask you to provide date range criteria on the report's General Tab. Although you can select specific date ranges, there are "canned" selections which include: This Fiscal Year, Last Fiscal Year, This Month, Last Month and more. Using these selections can help you avoid the need to manually update your date ranges over time.

Gift Types:

Many of our donor, gift, appeal and fund reports consider giving information. Your gift type selection has a great impact on your report output. It is essential to understand what our gift types are. View our gift type definitions here:

<http://www.seattleu.edu/WorkArea/linkit.aspx?LinkIdentifier=id&ItemID=47707>



Soft Credits:

Soft Credits allow us to better record/report on household and conduit giving (for example, an individual who gives through a foundation). On most reports, you choose how to handle soft credits on the Report's General tab. Although appropriate in many cases, choosing to credit soft credit gifts to "both" will overstate your giving totals. If you see a "#" next to a gift total in your report, this means that total includes soft credits.

Output Queries:

Many reports give you the ability to create an output query for records included in your report. Depending on the type of report, you could create Constituent queries, Gift queries or both. This means you can use the filtering options you set in your report instead of creating a complex query to produce the same results.

Show report criteria in your report:

On the Format tab of most reports, you have the option of displaying the criteria you used when pulling the report. Including these criteria is a great way to connect the filtering options you applied to the data your report produced. This will allow you to reference what you did when pulling the data you're looking at.

Anonymous Gifts:

It is important to understand how anonymous gifts are handled in your reports, especially if more eyes than yours are looking at it. The way you see anonymous donors depends on your own user options. To check your settings:

1. Click "Tools" from the top Raiser's Edge toolbar.
2. Click the "Reports" Tab.
3. Click the "Gift Preferences"

Once there, you can choose to include or exclude anonymous gifts from your report. If you choose to include anonymous gifts, you must choose how donor names appear in your report:

- *Asterisk at end of line*: will include anonymous donors and an "*" will display next to their name. This is recommended if you or fellow UA staff are the only ones who will view your report.
- *Leave name intact*: will show anonymous donors the same way other donors display. **Do not pick this option.**
- *Use Anonymous*: will not show the names of donors who gave anonymously, it will only show "Anonymous". This is recommended if those outside of UA are viewing your report.

There are some donors you make institutionally anonymous gifts, only meant for a select few SU staff to know about. These donors will always appear as Anonymous in your reports, regardless of your user options. You may learn more about our anonymous gift policy here:

<http://www.seattleu.edu/WorkArea/linkit.aspx?LinkIdentifier=id&ItemID=33360>