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Getting Started in Team Approach

[Logging on or Exiting TA](#)

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Logging on or Exiting TA

To log on to Team Approach® (TA), double-click the TA icon on your desktop. The Logon to Team Approach screen appears. Enter your User ID and password and the database name. Click <Connect> or press the [Enter] key. If you enter an invalid User ID or password, TA displays the message "Logon failed. Please try again." Click <OK> to close the message and enter a valid User ID and password. When you successfully log on to TA, TA displays the [Main Menu](#).

Note: If your organization disabled TA and you try to log on to TA, TA displays a message that indicates that TA is disabled. Your organization controls the text of this message. You can click <OK> to return to your desktop. If your user name is set up in TA as a manager, when you click <OK>, you log on to TA but the text of the message appears in TA's title bar.

Exiting TA


TA provides several ways for you to exit the application. From the Main Menu, you can exit TA in any one of the following ways.

- Select Exit Team Approach from the Screen drop down menu.
- Click on the upper top right windows close button (x).

Using the Main Menu

Although the modules and organization of screens, reports, and procedures has not been changed, as of version 5.0 the look and feel of TA has changed dramatically! After you first login, only the left Main Menu navigation bar is displayed. Select the module and corresponding operation and TA displays the screen. You see the modules or operations according to the user privileges that are set up for your User ID. (Therefore, in this Help or in other documentation you may see references to operations that you do not have access to.)

- You can set up your 'home' screen so that this screen displays automatically when you logon to TA. Go to User Preferences and Menu tab to set this up. Also, when you do set this default, the Home

icon  is enabled so that you can navigate to this screen at any time.

- To access an alphabetical list of all screens, reports, and procedures across all modules that you have user privileges to, click anywhere in the left Main Menu navigation bar and **press [F9]** or select **List All...** from the Screen drop down menu.

If you start typing, TA starts filtering the list according how the operation is named (text is auto inserted to the left of the %). You can click **to the right of the percent sign** and enter a key work to find any operation that has that text. For example, if you type 'interaction' the right of %, and then click [Find], TA displays 'Gift and Interaction History' as well as 'Interaction History.' Whereas, if you start typing 'int' (without clicking anywhere), TA starts displaying operations that begin with 'INT.'

- You can filter the Main Menu operations to show you only data entry screens, reports, or procedures. Use the **View** drop down menu and select **Menu Bar Filter** to restrict the display of operations. For example, to view only the reports associated with a module, select Reports. Then you click on any module, you only see the reports that are associated with the module.
- You can add any data entry screen, report, or procedure to your Favorites module. When you are in a screen (or report parameters) that you use often, select the Screen drop down menu (very top of your screen), and click **Add current screen to favorites**. To remove or adjust the operations in your

Favorites, you must access the User Preference screen (System Maintenance module). See [Customizing Your Menu](#) for more information.

Related Topic:

[Navigating](#)

Common Features and Functions

This section summarizes TA's common features such as on-line Help, hints and messages, printing a screen, and accessing TA's Audit window.

[Accessing TA Help](#)

[Viewing Hints](#)

[Viewing Messages](#)

[Printing a Screen Display](#)

[Accessing Audit Information](#)

[Plus Signs or Intelligent Buttons](#)

Accessing TA Help

The TA User's Guide is available electronically in a Windows help file format. Using Help can be an easier way to find specific information. Access TA Help in these ways:

- Press the [F1] key.
- Click <Help> on the toolbar.
- Select Index from the Help menu on the menu bar.

Once you are in the Help window, you can find information in these ways:

- In Contents, double-click on any book to navigate through the chapters.
- Use the Key Words Index to find specific information. When you type a word in the Index field, the system automatically jumps to topics that begin (or match) the letters as you type. You may double-click on the Index entry or scroll through the list of entries to find a topic.
- The Find tab provides a full-text search feature. Use this feature if you cannot find the topic you are looking for in the Index.

Other Help navigation options and tips:

- Use the <Back> button to return to the previous topic. To display a list of topics that you have previously viewed in your current session, select Display History Window... from the Options menu. You can select any topic that is displayed in the History window.
- You may bookmark any topic that you access frequently. Go to the topic and select Define... from the Bookmark menu. Once it is defined, you may select the topic directly from the Bookmark menu. (The beginning of the topic includes a paper clip to indicate that it is bookmarked.)
- You may add your own notes to any topic. Go to the topic and select Annotate... from the Edit menu. In the Annotate window, type your text and click the Save button. (The beginning of the topic includes a paper clip to indicate that it contains an annotation.)
- You may use the Browse buttons to move through the Help according to the sequence in the Contents. Select ≤< to go to the previous topic or ≥> to navigate to the next topic according to the order of topics in any chapter.

Viewing Hints

Each screen in TA includes an area at the bottom of the screen called the status bar.

TA displays hints in the status bar to indicate what kind of information you should enter in the active field. For example, when the application cursor is in a Name field, TA displays a message in the status bar to remind you to enter a name in that field.

TA also indicates in the status bar the number of characters you can enter in a free-text field and any formatting required for the information (e.g., the MM/DD/YY format required in date fields).

About the Indicators in the Status Bar

TA displays indicators in the status bar to remind you which functions you can execute from the active field. The following indicators can appear in the status bar.




- The New indicator, i.e., <New>, which indicates that you can press the [F6] key or click <New> on the toolbar to access the Create New window for the type of item entered into the active field (see ["Creating a Record"](#))
- The List indicator, i.e., <List>, which indicates that you can press the [F9] key or click <List> on the toolbar to view a list of valid values for the active field (see ["Lists of Values"](#))
- The Zoom indicator, i.e., <Zoom>, which indicates that you can press the [F10] key or click <Zoom> on the toolbar to view additional information for the active field. See: ["How to Use the Zoom Function"](#)

See Also:

[Viewing Messages](#)

Viewing Messages

TA displays messages in either the status bar or a pop-up window.* There are several kinds of messages in TA. The following table describes the types of messages and includes an example of each.

Type	Description
 Error:	The message forces you to correct an error. For example, on the Name Entry screen, you enter a title that is not included in the lists of values for the Title field. TA displays a pop-up window that says "Please enter a valid value, remove value or use the <List> to choose." You click <OK> to dismiss this message, but then you cannot move the application cursor from the active field until you correct the error.
 Warning	The message informs you about a situation that may affect processing in TA. For example, on the Address Entry screen, you inactivate the account's preferred address. TA displays the message "You have given the Account's Preferred Address a non-active status." to warn you that the account effectively no longer has a preferred address.
 Informational	The message provides you with information about the impact of your action, but you are not required to take further action. For example, on the Name Entry screen, you change the spelling of the first name for a person for which a custom salutation exists (e.g., a salutation used only in mailings signed by a specific employee of your organization). TA displays the message "Other salutations for this name exist. Only the default will be updated." You click <OK> to dismiss this message, and you do not have to take any further action.

In addition to the three kinds of messages described above, there are also messages that give you choices regarding how to proceed. For example, if you change the information for an account's home address on the Address Entry screen, TA displays the message "Do you want to save the old address?" You can click <Save> to have TA archive the old address or you can click <Discard> to keep the changes you made without saving the old address.

* **Note:** Error messages always appear in a pop-up window. Warning and Informational messages either appear in a pop-up window or in the status bar. For messages that appear in the status bar, TA includes a code at the beginning of the message. The first letter of the code represents the type of error: "I" for informational, "W" for warning, or "E" for error.

See Also:

[Viewing Message Details](#)

Viewing Message Details

When TA displays a message, you can access additional detailed information for the message if such details exist.

- To view details for a pop-up message, first click <OK> to close the message, then press the [Alt] [F1] key combination.* TA displays the message information in a pop-up window.

* **Note:** To view the details for an error message, you must resolve the error before you can press the [Alt] [F1] key combination. In most cases, you can resolve the error by undoing the action that caused the error message to display.

- To view details for a message in the status bar, press the [Alt] [F1] key combination. TA displays the message information in a pop-up window.

Note: Your organization can customize details for a message on the [Message Customization screen](#).

Printing a Screen Display

TA enables you to print a copy of each screen. You can print a copy of the screen with which you are working by performing any one of the following actions.

- Press the [Print Screen] key.
- Click <Print> on the toolbar.
- Select Print from the File menu on the menu bar.

TA displays the Print Setup window to enable you to select the printer, orientation, paper size, and paper source.

Accessing Audit Information

Access the Audit window to view information about the specific record with which you are working. You can access the Audit window by pressing [Ctrl] [A], clicking <Audit> on the toolbar, or by selecting Audit from the Options drop down menu on the menu bar.

The Audit Window displays this information about a record:

- The date and User ID of who created the record.
- The date and User ID of who last updated the record.
- The User ID of who last reviewed the record and the date on which it was reviewed (in development).
- Your User ID as the person who is currently viewing the record.

- The current date and database name with which you are working with.
- If your organization has set up specific fields to be audited, you can click <Detail> to view how specifically field(s) associated with the record was changed. The Audit Details window displays the date, user ID, table name, column (field name), and the old and new value of the field. **Note:** it can take a minute or two for TA to display this window.

See [Field-Level Auditing Configuration](#) for more information on setting up this feature.

Plus Signs or Intelligent Buttons

On any of the Account Overview screens, whenever you see a button that has a plus sign to the right of the button name it means that there data behind the button. For example, on the Account Overview screen, if the Interest button displays as **Interest+**, it means that there are interest records associated with the account. To view the details of those records, click on the button. If the button does not have a plus sign, it means that there is no data and if you click on the button, you will be prompted to create the first record.

Setting up Your TA Preferences

[Setting Screen, Report, and Procedure Preferences](#)

[Setting Data Entry and Other General Preferences](#)

[Creating Copies of Screens, Reports, and Procedures](#)

[Customizing Your Menu](#)

Setting Screen, Report, and Procedure Preferences

Most TA reports and procedures, and several TA screens, have preferences associated with them that enable you to customize the information that displays when you access them.

For example, the Interaction by Technique report has a set of parameters that allows you to customize the report to include the information you want to see. These parameters have default values that have been set by a system administrator; these values appear whenever you access the report's Request an Operation window. Each time you run the report, you can override some or all of these parameter values. This can be time consuming, so if you generally run the report with a different set of parameter values than those set by the system administrator, you can set up your own parameter values that default when you request the report.

Note: If you use the same screen, report, or procedure in several distinct ways, you can make one or more copies of it in order to set different sets of preferences. For more information, see [Creating Copies of Screens, Reports, and Procedures](#).

You set preferences for screens, reports, and procedures on the User Preferences screen, which is located in the System Maintenance module in TA. (*Note that system administrators use a different screen (or screens) to set preferences.*) The User Preferences screen contains several tab pages.

- To set up preferences for a specific screen, access the Screens tab.
- To set up preferences for a specific report, access the Reports tab.
- To set up preferences for a specific procedure, access the Procedures tab.

Note: Your system administrator has determined which preferences you have access to change.

See Also:

[Setting Screen Preferences](#)

[Setting Report Preferences](#)

[Setting Procedure Preferences](#)

Setting Screen Preferences

Your TA system administrator has set screen preferences for all TA users. In some cases, if you have been given the privileges to do so, you may decide to override the preferences and set your own. To view the screens for which you can set up defaults access the Screens tab of the User Preferences screen (located in the System Maintenance module).

*** Note:** There are two screens in TA that you can completely customize: Giving History Summary and Interaction History. For details on how to customize these screens, see [Customizing Screens](#).

For definitions of all of the screen-related preferences, see [Screen-specific System Preferences](#).

Note: You may not have access to change a number of the preferences listed in the section referenced above. Contact your system administrator if there is a preference for which you do not have access that you would like to change. *(Note that system administrators use a different screen (or screens) to set preferences.)*

Also note that some preferences that you expect to find associated with a particular screen may in fact be listed on the Entry, General, or Processing tabs. For example, the Display Paid Amounts in Account Activities preference affects reports as well as the Account Activities screen, so it is located on the General tab.

Setting Report Preferences

Report preferences determine the values that you can set for each report parameter. Your TA system administrator has set default parameter values that apply to all TA users. However, in some cases, you can change the parameter values to better suit your needs.

You can set values for report parameters on the Reports tab of the User Preferences screen, which is located in the System Maintenance module. *(Note that system administrators use a different screen (or screens) to set preferences.)* Enter the new value in the Value field that corresponds to the parameter you want to change.

Note: Many parameters contain a list of values, so if you see the List of Values indicator in the status bar, press the [F9] key to select from a list of valid values.

For those parameters that you have access to change on the User Preferences screen, you can also change the parameter value when you actually run the report, unless you choose to not display a parameter. See the relevant TA report chapter for more information about the parameters you can set for each report.

See Also:

[Choosing to Not Display a Parameter \(Report Preferences\)](#)

[General Report Parameters \(Report Preferences\)](#)

Choosing to Not Display a Parameter (Report Preferences)

You can choose to have TA suppress a parameter when you request the report. If you suppress a parameter, TA does not display the parameter and you are not given the option of changing the parameter value when you submit the report. An example of when you might want to suppress one or more parameters is for a report that contains a large number of parameters that you always set the same way. If you are sure you will not change some parameters, you may find the process of submitting the report quicker if you suppress those parameters that remain constant.

To suppress a parameter on the Reports tab of the User Preferences screen, set the Available When Scheduling (AWS) field on the parameter to "N" for no.

General Report Parameters (Report Preferences)

There is a set of general parameters that apply to every report (i.e., Printer Name, Output Destination, Print Format, Copies, and Filename).

When you access these parameters on the Reports tab of the User Preferences screen, TA displays "<Use Preferred>" as the value. This means that unless you change the value, TA uses the values set as the preferred ones set for your organization, or in some cases, TA uses your own preferred settings (located in the Reports/Outputs area on the General tab).

If you want to specify a different printer that TA should use every time you run the Batch Detail report, for example, set the Printer Name field on that report to the specific printer that TA should use.

Setting Procedure Preferences

Procedure preferences determine the values that you can set for each procedure parameter. Your TA system administrator has set default parameter values that apply to all TA users. However, in some cases, you can change the parameter values to better suit your needs.

You can set values for procedure parameters on the Procedures tab of the User Preferences screen, which is located in the System Maintenance module. *(Note that system administrators use a different screen (or screens) to set preferences.)* Enter the new value in the Value field that corresponds to the parameter you want to change.

Note: Many parameters contain a list of values, so if you see the List of Values indicator in the status bar, press the [F9] key to select from a list of valid values.

For those parameters that you have access to change on the User Preferences screen, you can also change the parameter value when you actually run the procedure, unless you choose to not display a parameter.

Procedures in TA are grouped into several areas. Click on one of the links below for more information about the procedures in the group, and for details about the parameters relevant to each procedure.

[Update Procedures](#)

[Gifts and Pledges Procedures](#)

[Uploads](#)

[Downloads](#)

See Also:

[Choosing to Not Display a Parameter \(Procedure Preferences\)](#)

Choosing to Not Display a Parameter (Procedure Preferences)

You can choose to have TA suppress a parameter when you request the procedure. If you suppress a parameter, TA does not display the parameter and you are not given the option of changing the parameter value when you submit the procedure. An example of when you might want to suppress one or more parameters is for a procedure that contains a large number of parameters that you always set the same way. If you are sure you will not change some parameters, you may find the process of submitting the procedure quicker if you suppress those parameters that remain constant.

To suppress a parameter on the Procedures tab of the User Preferences screen, set the Available When Scheduling (AWS) field on the parameter to "N" for no.

Setting Data Entry and Other General Preferences

You can set a number of preferences that have to do with data-entry. For example, if you generally work with large corporate accounts, you can set the account type that defaults when you create an account to "LC" for Large Corporation.

In addition, there are some preferences that have to do with general settings that affect things like TA reports and other TA processing that happens in the background.

To set data-entry, background processing, and other general TA preferences, access the User Preferences screen from the System Maintenance module. The User Preferences screen contains several tab pages.

- To set up data-entry preferences, access the Entry tab.
Note: To set a preference that affects only one TA screen, see "Screen Preferences."
- To set up background processing preferences, access the Background tab.
- To set up general preferences (such as default printer), access the General tab.

To change a preference, select the system area in the Operation field, and then enter the new value in the Value field that corresponds to the preference you want to change.

See [Entry System Preferences](#), [Background Processing System Preferences](#), and/or [General System Preferences](#) for more information about the preferences you can set.

Note: Your system administrator has determined which preferences you can change. You will not have access to change some of the preferences in the sections referenced above. *(Note that system administrators use a different screen (or screens) to set preferences.)*

Creating Copies of Screens, Reports, and Procedures

If you use the same screen, report, or procedure in several distinct ways, you can make one or more copies of it in order to set different sets of preferences. For example, assume that you regularly run the Solicitation Response report to gather information about the solicitations for a particular campaign, and you also regularly run it with a very different set of parameters to look at renewal response information. Because the parameter values are so different in the two situations, you could save a lot of time by setting the default parameter values one way on the original report and creating a copy called something like "Renewal Response" with the different values for the second report.

You can create copies of screens, reports, and procedures on the User Preferences screen, which is located in the System Maintenance module. *(Note that system administrators use a different screen (or screens) to create copies.)* The User Preferences screen contains several tab pages. To create a copy, complete the steps below.

1. Access the appropriate tab (Screens, Reports, or Procedures) depending on the operation you want to copy (e.g., to create a copy of the Solicitation Response report, access the Reports tab).
2. Select the operation you want to copy in the Operation field.
3. Click <Save As...>. TA displays a window where you can enter the new name for the copied operation (TA defaults the new name to "Copy of [name of operation]").
4. Change the name of the copied operation if desired. The name can be up to 30 characters.
Note: You can change the name of your copied operation at any time in the future by clicking <Rename>.
5. Mark or unmark the appropriate checkboxes to indicate whether the copied operation should show up in your menu, and if so, whether it should appear in your Favorites module.
6. Click <Save>.

When you next access the appropriate module, your copied operation will appear at the bottom of the list. If you want to move your copied operation to a different location, see the steps in [Choosing the Display Order for Your Copied Operations](#).

Restoring the Settings for a Copied Operation to the System Defaults

If you want to remove your customized settings for an operation and return to the defaults set for the system, click <Restore Defaults>.

Customizing Your Menu

If you have been given the privileges to do so, you can customize your TA menus from the User Preferences screen in the System Maintenance module. *(Note that system administrators use different screens to customize menus for all users or user groups.)* You can customize your menus in the following ways:

- Choose the 'startup' module that appears when you log on to TA.
- Build a Favorites module, and select which operations (both customized and standard TA operations) appear in the module. You can add any screen, report, or operation to your favorites. When you are in a screen (or report parameters) that you use often, select the Favorites menu (very top of your screen), and click **Add current screen to favorites**.
- Define your own home screen. This screen displays when you first login and you can access it anytime by clicking on the Home icon.
- Choose the display order for your copied operations in each module.
- Remove or add back your copied operations from a particular module.

Note: See [Creating Copies of Screens, Reports, and Procedures](#) for more information about copied operations.

See Also:

[Defining Your Startup Module, Home Screen, and Favorites](#)
[Choosing the Display Order for Your Copied Operations](#)

Defining Your Startup Module, Home Screen, and Favorites

If you have user privileges to you can define your own Favorites module, Home screen, and start up screen in TA.

To Add to Your Favorites:

- When you are in a screen (or report parameters) that you use often, select the Screen drop down menu, and click **Add current screen to favorites**.

To Remove Items or further adjust your favorites:

1. Access the User Preferences screen in the System Maintenance module.
2. Select the Menu tab.
3. Select the module associated with the operation you want to make a favorite in the Module field.
4. Find the operation in the list of operations.
5. Click <Add to Favorites>.

Repeat steps 1-5 for all operations you want to add to your Favorites module.

6. Once you have created your Favorites module, you can organize it. To organize your Favorites module, select Favorites in the Module field. You can then move operations up or down, and remove operations as needed. The information in [Choosing the Display Order for Your Copied Operations](#)

applies to all operations that appear in your Favorites module, whether the operations are copies you created or operations owned by the system.

Creating a 'Home Screen' (User Preference/Menu tab)

- In the Home Screen field, select the screen that you want to automatically display when you login and the screen that you want TA to navigate to if click on the Home icon. Click on the blue button to select from the list of screens that you have access to.

Defining the Start up Module (User Preference/Menu tab)

- In the Start In Module field, select the module that you want to automatically display when you login. Click on the blue button to select from the list of modules that you have access to.

Choosing the Display Order for Your Copied Operations

If you have made copies of operations, you can indicate where the copies should display in the list of operations for the associated module.

Note: With the exception of your Favorites module, you can change the display order **only** for those operations that you own, not for those operations that are owned by the system. See [Creating Copies of Screens, Reports, and Procedures](#) for more information about copied operations.

To choose the display order, complete the steps below.

1. Access the User Preferences screen in the System Maintenance module.
2. Select the Menu tab.
3. Select the module with which the copy is associated in the Module field.
4. Find your copy in the list of operations.
5. Use the <Up> or <Down> buttons to move the copy to the desired location.

Removing a Copy From the List of Operations

If you no longer want your copied operation to display on the menu, follow steps 1-4 above. Then click <Remove>. TA puts the copy into a behind-the-scenes Module called Not Displayed.

Adding a Copy Back to the List of Operations

If you previously removed a copied operation from the menu and now want to add it back, follow steps 1-3 above, selecting the Not Displayed module in step 3. Select the copied operation. Click <Add to Menu>. When you next access the appropriate module, your copied operation will appear in the list of operations.

Note: TA gives you the option of displaying the operation in your Favorites module when you click <Add to Menu>.

Navigating

[Map of Icons, Function Keys, Drop Down Menus](#)













[Using Menus](#)







[Switching Accounts to View](#)

[Moving Within and Between TA Screens](#)

Map of Icons, Function Keys, Drop Down Menu

The chart below describes each button on the toolbar and its equivalent function key or keystroke combination and the drop down menu it can be found on (if applicable).

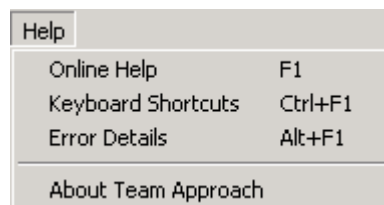
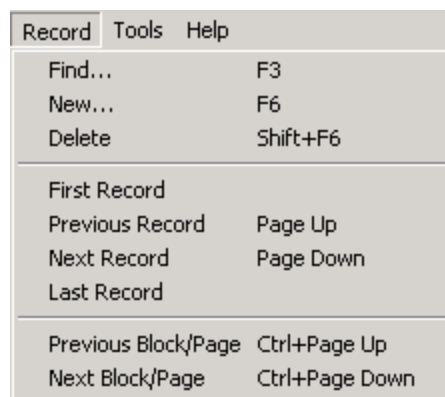
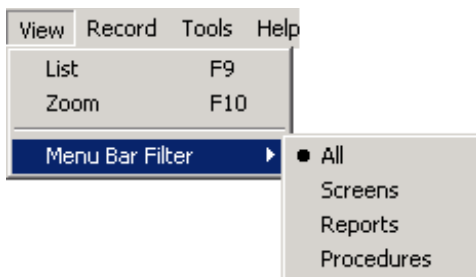
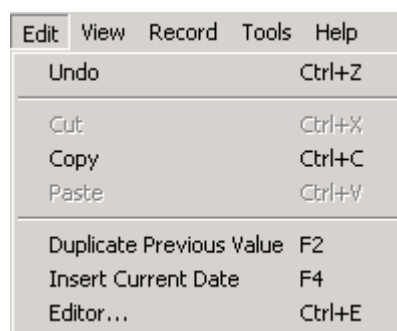
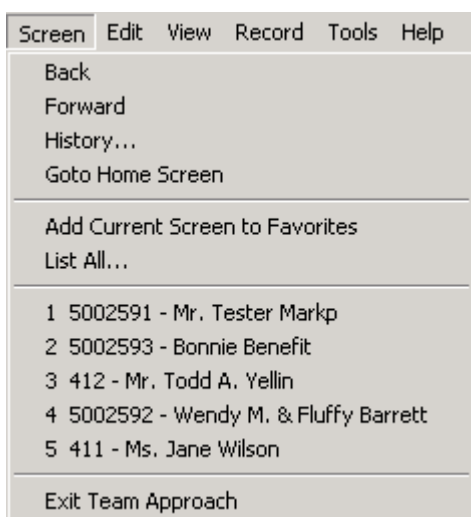
Icon	Function	Dropdown Menu	Key or Key combination
	Back to previous Screen or Forward Screen	Screen	Alt S, then B for back or F for forward
	History. A list of the screens, reports, or processes you have accessed during your login session.	Screen	Alt S, then H
	Home. Access the screen you have defined as your Home screen. See Defining Your Startup Module, Home Screen, and Favorites for more information.	Screen	Alt S, then G
  	Cut text that you have highlighted Copy highlighted text. Paste text that was previously copied	Edit	Ctrl X Ctrl C Ctrl V
	Undo last keystroke (no icon for this). This works only if you have not exited the field.		Ctrl Z
	To view a list of valid values for the field that the cursor is in. See " Lists of Values "	View	F9
	Zoom to view the detail screen to enter more information for a field or record. " How to Use the Zoom Function "	View	F10
	Accesses the Find window applicable to the type of record with which you are working. For example, in the Accounts module, you access the Find an Account window. See " Finding a Record "	Record	F3
	To create a new record or account. See " Creating a Record "	Record	F6
	To delete a record on select screens such as to delete a batch item on the Batch Detail Entry screen. See " Deleting a Record ".	Record	Shift F6

Icon	Function	Dropdown Menu	Key or Key combination
	<p>To scroll to the first, previous, next, or last record in a multi-record block</p> <p>First Record Previous Record Next Record Last Record</p> <p><u>Other field/screen navigation:</u></p> <p>Next or Previous block of fields: Ctrl PgDn and Ctrl PgUp</p> <p>Tab to move to next field (or button). Shift Tab to move to previous field (or button).</p> <p>Move to the previous tab page. Ctrl PgUp or Ctrl+Shift+Tab</p> <p>See "Moving Within and Between TA Screens"</p>	Record	up or down arrows
	To access the Notes window for the current account. See " Notes and Comments "	Tools	Ctrl N
	Accesses the Audit window to see information such as who created and last updated information for the current record. See " Accessing Audit Information " for more information.	Tools	Ctrl A
	To print a copy of the current screen. See " Printing a Screen Display "	Tools	Shift F8
	To run the report associated with the current screen. See " Running the Report Associated with the Current Screen "	Tools	Ctrl R
	Access help information. See " Accessing TA Help "	Help	F1
X	Closes the screen or window. From the Main Menu, this key closes the TA application. This key is a standard Windows function.	Screens	Ctrl F4
Other Keyboard Functions/Shortcuts			
Current Date	Inserts the current date into any date field	Edit	F4
Copy	Copies the information from the previous record into the current record.	Edit	F2
Additional Error Text	Accesses detailed information for the error, warning, or informational message currently being displayed.	N/A	Alt F1
List of function keys for the screen	Accesses the keyboard map of the function key assignments available from the current screen.	N/A	Ctrl F1

Icon	Function	Dropdown Menu	Key or Key combination
Left Menu Keyboard Navigation	<p>F5 toggles between the left menu and the screen displayed on the right.</p> <p>Tab moves to the next operation. Shift Tab moves to the previous operation</p> <p>Ctrl Page Up or Ctrl Page Down moves to the previous or next module</p>		

Using Menus

You can use the TA Icons or drop down menus to perform a range of functions. Below is a visual reference of each drop down menu in TA. Note that menu items are enabled or disabled depending on where you are in TA and your user privilege setup.



Tools	Help
Notes...	Ctrl+N
Audit Information...	Ctrl+A
Print...	Shift+F8
Report...	Ctrl+R
Change Password...	
Submitted Requests...	
Preferences...	

Switching Accounts to View

Within your login session, you regularly look at different accounts to update or view account-related information. You can use the **Screen** drop down menu to access a list of the 5 most recent accounts that you have been working with. To switch the account, highlight your choice from the File menu. Use this quick switching from any account-based screen such as Account Overview, Giving History, or any Interaction screens (such as Customer Service Entry, Account Diary, or Inquiry & Referral).

You can also switch the account you are viewing by using the Find icon on the Toolbar

Screen	Edit	View	Record	Tools	Help
Back					
Forward					
History...					
Add Current Screen to Favorites					
Zoom					F10
List All...					
1 5002296 - Mr. Marc Lagoat					
2 10016548 - Ms. MaryAnn Lacross					
3 10015395 - Mr. Anthony Jones					
4 301 - Mr. George Lightbody & Mr...					
5 5002592 - Wendy M. & Fluffy Barrett					
Exit Team Approach					

Moving Within and Between TA Screens

Moving Within a Screen

Press the [Tab] key to move the cursor to an item to the right of or below the active item. Press the [Previous Item] key to move the cursor to an item to the left of or above the active item.

- Do not press the [Enter] key to move from one field to the next. Press <Tab>, click in the field, or use the [Previous Item] key. Pressing [Enter] in a Windows-based application, selects the button that is displayed on the screen or window such as <OK>, <Create>, or <Connect>.
- Many fields in TA are display only, i.e., they display information but you cannot update them. When you press the [Tab] or [Previous Item] keys, TA skips over display-only fields.

Moving Within a Multi-line Field

When the cursor is in a multi-line field such as the Comments field on the Account Overview screen, you cannot use the [Tab] or [Previous Item] keys to move the cursor from the field to the next item on the screen. Press the [Ctrl] [Tab] key combination to move to the next item, and press the [Ctrl] [Previous Item] key combination to move to the previous item.

Multi-record Blocks

A multi-record block groups together records of the same type on a screen that displays multiple records of different types. For example, on the Account Overview screen, TA groups the names together in one block and the addresses in another block. If there are more records than are displayed and you don't want to scroll, click on the Expand button (blue buttons to the right of the block). TA displays a summary of all of the records in that block.

Options for Scrolling Through a Multi-Record Block

Using Function Keys	Press the [Down] key or the [Next Record/Page] key to highlight the next record in a multi-record block. Press the [Up] key or the [Previous Record/Page] key to highlight the previous record in a multi-record block.
Using the Toolbar	Click the <Next> button on the toolbar to highlight the next record in a multi-record block. Click the <Prev> button to highlight the previous record in a multi-record block.
Using the Menu Bar	Select Previous from the Record menu to highlight the previous record in the block, and select Next from the Record menu to highlight the next record in the block. To highlight the first record in the block, select First from the Record menu. Select Last from the Record menu to highlight the last record in the block.
Moving Between Multirecord Blocks	To move the cursor from one multi-record block to another without using your mouse. Press the [Next Block] key to highlight the first record in the next block on the screen. Press the [Previous Block] key to highlight the first record in the previous block on the screen.

Screen/Data Entry Basics

[Data Entry Shortcuts](#)

[Lists of Values](#)

[How to Use the Zoom Function](#)

Data Entry Shortcuts

- TA enables you to **copy information** from a field in one record to the corresponding field in the next record by pressing the **[F2] key**. For example, on the Batch Detail Entry screen, you can copy the source code from the first batch item entered to the Source Code field of the second batch item by pressing the [F2] key in the Source Code field of the second batch item.
- TA provides a shortcut for inserting the **current date** in a field that requires a date. To enter the current date in a field, highlight the field and press the **[F4] key**. TA also provides a Calendar pop-up on date fields in TA that you can access by pressing the [F9] key. The Calendar pop-up enables you to select a past, present, or future date by scrolling through a calendar.

Note: If the field is a date field, TA displays a calendar of dates rather than an LOV.

- **[Ctrl] T** key combination permits you to add a new record from the Account Overview screen. Position the cursor in the block corresponding to the information you want to add, and then press **[Ctrl] T**. TA displays the Create New window. For example, if you place the cursor in the Telephone block and press [Ctrl] T, the Create New Telephone window displays and you can add the new information.

- TA provides a **List of Values** (LOV) for many fields. If the status line indicates that an LOV is available, press **[F9]** from the field and select from the list. Because some LOVs are too long to display quickly, you may need to enter the first couple of characters in the field and then access the list.
- TA enables you to use function keys to move through a screen, between screens, and to carry out specific actions. From any screen in TA, you can view a **list of function keys that are available** from the screen. Press the **[Ctrl] [F1]** key combination or select Keys from the Help menu on the menu bar to view a list of functions and their corresponding keys or key combinations. Click <OK> or press [Enter] to return to the screen on which you are working.

Lists of Values

In many fields in TA, you can press [F9] or click <List> to access a list of values (LOV) that is valid for that particular field. Your organization has created most of these codes so that you can standardize data entry for the field. (TA does include a set of standard lists that is usually adjusted during the implementation process.) The LOV for any report parameter includes Active and Inactive codes. In data entry screens, the LOV displays only codes with an Active status.

If a field includes an LOV, then data entry is validated. That is, the user is required to match what she or he enters with a value that is in the LOV. While you can enter a code directly into the field without having to select from the list, if you mis-type the value, TA will not let you exit the field until you enter a value that matches the LOV. Fields that have an LOV does not mean that data entry is required in that field. Only that if you do enter the field, then what you enter must match. There are only a couple of LOV fields (such as Job Title in the Name Entry screen) that permit you to enter information other than what is in the LOV.

Note: Your organization can add or adjust codes at any time. If you do not find a specific code in a list of values, follow your organization's business practice for adding the code.

See Also:

[Accessing a List of Values](#)

[Selecting from a List of Values or Alternate List](#)

[Entering an Invalid Value](#)

[Reducing the List of Values](#)

[Using the \[F9\] Key to Access the Find an Account Window](#)

Accessing a List of Values

If your cursor is in a field where you can access a list of values (LOV), TA displays <List> in the status bar. To view the values associated with the field, click <List> on the toolbar or press the [F9] key. TA displays the LOV for the highlighted field. The list includes

- Each valid value (i.e., code) and its description,
- The Find field and <Find> button,
- The <OK> button, and
- The <Cancel> button.

Note: Certain LOVs include additional information to assist you in selecting the correct code. For example, the list of values for the Account Type field includes a code for each valid account type, a description of each code, and the account category to which each account type maps.

See Also:

[When You Must Enter Information to Access a List of Values](#)

[Accessing a List of Values by Entering Letters](#)

When You Must Enter Information to Access a List of Values

For certain fields, the list of valid values (LOV) is extremely long. From these fields, you cannot access the field's LOV by leaving the field blank and pressing the [F9] key. If you try, TA displays in the status bar a message asking you to enter some information to limit the list. The information you must enter is the first letter or letters of the code for which you are looking. For example, your organization stores hundreds of source codes in TA. When you press the [F9] key from a field that requires a valid source code, TA displays the message "Please enter some information in the source field to limit list of values." In this example, you can enter the letters "AM" and press the [F9] key to view a list of source codes for the Annual, Membership activity.

Note: Each organization can configure its marketing codes differently. The above example refers to a source code commonly configured in TA.

TA requires you to enter one or more letters of the beginning of the code for which you are looking before you access the LOV for the following fields.

- Benefit
- Program
- Source

Accessing a List of Values by Entering Letters

In the Program and Benefit fields, you can enter one or more letters of the *description* of the code for which you are searching to access a list of values for that field. You can search the list of values by description in one of the following two ways.

- Enter one or more letters into the field and press the **[Alt] [F9]** key combination to access a list of all values for which the description *begins* with the letter(s) you entered. For example, from the Benefit Entry screen you press the [F3] key to access the Find Benefits window. You want to search for a mug that your organization offers as a benefit. In the Benefit field, you enter "MUG" and press the [Alt] [F9] key combination. TA displays a list of values that includes only benefits for which the description begins with "Mug."
- Enter the wildcard (i.e., "%") followed by one or more letters and press the [Alt] [F9] key combination to access a list of values for which the description *includes* the letter(s) you entered. For example, from the Find Benefits window you enter "%MUG" in the Benefit field and press the [Alt] [F9] key combination. TA displays a list of values that includes only benefits for which the description includes the letters "mug."

Selecting from a List of Values or Alternate List

To select a value from an LOV, you can

- Double-click the value,
- Highlight the value and click <OK>, or
- Highlight the value and press the [Enter] key.

The value you select appears in the field. You can click <Cancel> to close the LOV without making a selection.

For some fields in TA, you can access multiple lists of values. Each LOV contains a different set of valid values. TA enables you to access the different LOVs for the field by using the [F9] key in combination with other keys.

For example, on the Batch Detail Entry screen in the Benefits field, you can press the [F9] key to access a list of values associated with the source of the gift; the [Alt] [F9] key combination to access a list of benefits associated with any source code with the same activity, campaign, and initiative as the source of the gift; and the [Ctrl] [Alt] [F9] key combination to access a list of all benefits.

Entering an Invalid Value

You cannot enter an invalid value into a field for which a list of values (LOV) exists. If you enter an invalid value and try to exit the field or the screen, TA automatically displays the LOV. If you click <Cancel>, TA displays in the status bar the error message "Please enter a valid value, remove value, or use the <List> to choose." TA continues to display the LOV until you select a value or remove the invalid value. For more information on hints that TA displays in the status bar, see "[Viewing Hints](#) "

Reducing the List of Values

When you access the LOV for a highlighted field, TA displays all values that are valid for the field. The values are ordered alphabetically by code. You can reduce the list that TA displays in one of two ways.

- You can search the list by code.
- You can search the list by code and description.

See Also:

[Searching a List of Values by Code](#)

[Searching a List of Values by Code and Description](#)

Searching a List of Values by Code

To reduce a list of values based on the code, enter the first letter(s) of the code you want to find.

You can enter the first few letters of the code for which you are searching without using the mouse to move the cursor to the Find field when you type the letters as soon as TA displays the LOV. The letters appear in the Find field to the left of the wildcard (i.e., "%"), and the list is reduced to only the codes that begin with the letters you entered.

For example, you want to create a "Member to Organization" relationship between two accounts. You press the [F9] key from the Relationship Type field on the Create New Relationship window. You enter the letter "m" to have TA display only relationships for which the code begins with the letter "m."

To expand the list (i.e., to display more codes), press the [Backspace] key. Each time you press the [Backspace] key, you delete one letter from the Find field.

Searching a List of Values by Code and Description

You may find it useful to search both the code and description to reduce the LOV. To search by code and description, use the mouse to position the application cursor to the right of the % in the Find field. Enter the appropriate letters and click <Find>. TA searches both the codes and the descriptions for the letters you entered. TA lists all values that include those letters anywhere in the code or the description.

For example, from the Interest field on the Interest Entry screen, you want to search the list for interests related to computers. You enter the letters "com" to the right of the wildcard and click <Find>. TA lists all interests that include the letters "com" in either the code or the description.

Using the [F9] Key to Access the Find an Account Window

When the active field requires an Account ID, TA displays the List indicator, i.e., <List>, in the status bar. If you do not know the Account ID, you can press the [F9] key or click <List> on the toolbar to access the Find an Account window. You can search for the appropriate account by name, brief name, address, telephone number, or query. See the [Managing Account Information chapter](#) for more information on searching for accounts using the above criteria.

Note: When the active field requires an Account ID, you cannot access the Find an Account window by pressing the [F3] key. You press the [F3] key to access the Find an Account window only when you are working on an account-based screen and want to view or enter information for another account, i.e., you want to change your current account. See "[About the Concept of a Current Account.](#)"

How to Use the Zoom Function

TA provides the Zoom function to enable you to view or enter more detailed information for the active field or record. You can use the Zoom function by pressing the [F10] key or clicking the <Zoom> icon on the toolbar. For example, on the Account Overview screen, you can press the [F10] key to view or enter more detailed information about a name in the Names block.

When you see the Zoom indicator: <Zoom> in the status bar it means that you zoom to access more detailed information.

Working with Records

[Status Field](#)

[Using the List Block to Select a Record](#)

[Finding a Record](#)

[Creating a Record](#)

[Saving a Record](#)

[Deleting a Record](#)

Status Field

A record is a set of related information that can be accessed as a whole. For example, TA contains name, address, classification, and interest records.

You can set the status for most records in TA. The primary status codes in TA are as follows:

- "A" for active
- "I" for inactive
- "D" for delete

In most cases, when you create a new record, TA sets the Status field to "A" for active.

Note: TA does not default the Status field to "A" for all records in TA, and certain records may include additional status codes (e.g., the status code "U" for undeliverable exists for address records only). Such exceptions are noted throughout the documentation.

See Also:

[Setting a Record's Status to Inactive or Delete](#)

Setting a Record's Status to Inactive or Delete

You can set the Status field for a record to "I" to indicate that the record is inactive. Marking a record inactive indicates that you want to retain the record in TA even though that record is not considered active. Your organization determines the policy for when records should be marked inactive. Inactive records do not appear in LOVs.

You can set the Status field for a record to "D" to indicate that the record should be deleted from TA. For more information on deleting a record, see "[Deleting a Record](#)". Records marked for deletion do not appear in LOVs.

Using the List Block to Select a Record

TA displays a List Block in the lower right corner of most screens. The List Block shows a list of the records associated with each screen (e.g., a list of the names associated with an account on the Name Entry screen). To view a different record, highlight the record in the List Block. TA automatically displays the information for that record on the screen with which you are working.

Note: On certain screens (e.g., screens on which you enter codes in TA), TA does not automatically display the information for a record when you highlight it in the List Block. On such screens, you must highlight the record and click the <Zoom> button to the left of the record. In future releases of TA, all screens will have the standard List Block.

Finding a Record

TA enables you to search for a record using the Find window. Press the [F3] key or click <Find> on the toolbar to access the Find window for the type of record with which you are working. From Find windows you can either find the record or create a new record directly.

TA automatically displays the Find window if you 1) have not accessed any account-based screens during your login session, or 2) if you are working with code-based screens. For example, when you access the Benefit Entry screen in the Marketing and Benefits module, TA automatically displays the Find Benefits window.

See Also:

[About the Concept of a Current Account](#)

About the Concept of a Current Account

If you have are working with an account, TA automatically displays information for that account when you access any account-based screen. Change the account you need to view or update, by using the [File drop down menu](#) if you have recently accessed the account or by clicking <Find> (or pressing [F3]) to access the Find window.

The term 'current account' simply means that it's the most recent account with which you have been working in your TA session. Account-based screens include, Account Overview and all of the screens that you can launch from there (Name Entry, Address Entry, Telephone, Account Activity, Relationship Entry, Account Projects, etc.) as well as history screens such as Giving History and Interaction-related screens (Customer Service Entry, Account Diary, Inquiry & Referral View). Note that in history screens you can use search parameters to display multiple accounts.

Creating a Record

You can create a new record from most screens in TA. You can create the type of record associated with the screen with which you are working by

- Pressing the [F6] key,
- Clicking <New> on the toolbar, or
- Selecting New from the File menu on the menu bar.

For example, you can press the [F6] key from the Account Overview screen to create a new account record. TA displays the Create New Account window. To create a new address record for an account, press the [F6] key from the Address Entry screen. TA displays the Create New Address window.

See Also:

[When TA Displays the New Indicator](#)

[Creating a New Record from the Find Window](#)

When TA Displays the New Indicator

The New indicator, i.e., <New>, appears in the status bar to indicate that you can press the [F6] key to access the Create New window for the type of item entered into the active field (i.e., you do *not* access the Create New window for the type of record associated with the screen that you are viewing).

For example, the New indicator appears in the status bar when the Preferred Address field on the Name Entry screen is the active field. From this field, you can add a new address for the name (i.e., person) or for the account without first having to exit the Name Entry screen.

Creating a New Record from the Find Window

When you select a screen from the Main Menu, TA displays a Find window to enable you to choose whether you want to find an existing record or to create a new record. For example, when you access the Benefit Entry screen in the Marketing and Benefits module, TA automatically displays the Find Benefits window. To create a new benefit record, click <New> to access the Create New Benefit window.

Note: When you select an account-based screen, TA displays the Find an Account window only if you do not have a current account, i.e., an account with which you have been working in your current TA session. If you click <New> on the Find an Account window, TA displays the Create New Account window. For more information, see "[About the Concept of a Current Account](#)"

Saving a Record

TA automatically saves a new record or changes to an existing record when you exit the field, record, or screen. There is no additional save step or save command in TA.

See Also:

[About Concurrency Messages](#)

[When TA Displays Concurrency Messages](#)

About Concurrency Messages

TA allows multiple users to view the same record but does not allow more than one user to update a record. If two or more users try to update the same record at the same time, TA keeps the changes from the user who first updates the record. TA saves those changes when that user exits the record.

When TA Displays Concurrency Messages

When You Exit	<p>TA displays two concurrency messages when you exit a record to which you made a change.</p> <ul style="list-style-type: none"> • If another user updated the record, TA displays the message, "Another user has updated this record. Your changes will not be saved. Exit?" Click <Yes> to exit the screen without saving your changes. Click <No> to return to the screen. • If another user is updating the record, TA displays the message, "Another user is updating this record. Your changes will not be saved. Exit?" Click <Yes> to exit the screen without saving your changes. Click <No> to return to the screen.
When You Press the [Tab] or [Previous Item] Key	<p>TA displays two concurrency messages when you press the [Tab] or [Previous Item] key from a field to which you made a change.</p> <ul style="list-style-type: none"> • If another user updated the record, TA displays the message, "Another user has updated this record. Re-Find to see changes." Click <OK> to return to the screen. • If another user is updating the record, TA displays the message, "This record is being updated. Change records or continue read-only?" Click <OK> to return to the record.

Deleting a Record

You cannot delete a record directly from the screen. To delete a record, you must mark the record for deletion by entering a "D" for delete in the record's Status field. TA does not delete the record when you change the status code to "D." The record is deleted when your organization runs delete processing to eliminate all records for which the status is "D." Your organization establishes a schedule and procedure for processing records marked for deletion.

Note: On select screens, you can delete a record from a multirow block by pressing the [Delete Record] key or clicking the <Delete> button on the toolbar. On such screens, TA enables the <Delete> button on the toolbar. For example, on the Batch Detail Entry screen, you can delete an individual batch item by pressing the [Delete Record] key or pressing the <Delete> button on the toolbar when TA displays the batch item on the screen.

About Reports

[Selecting a Report](#)

[Request an Operation Window](#)

[Fiscal and Calendar Date Parameters](#)

[Processing a Report in TA](#)

[Viewing the Status and Parameters for a Report](#)

[Running the Report Associated with the Current Screen](#)

[Report Descriptions](#)

Selecting a Report

You can select a report in one of the following ways.

- You can select the report from a menu, e.g., the Main Menu.
- You can click the <Report> button on the toolbar or press the [Print Report] key to access the report associated with the screen with which you are working.

When you select a report, TA displays the Request an Operation window for that report.

Note: You can also access the Request an Operation window for a report when you schedule the report on the Schedule Administration screen (i.e., when you want the report to run at a later time). See the System Administration chapter for more information on using the Schedule Administration screen.

Request an Operation Window

The Request an Operation window enables you to customize a report to include the information you want to see. The Request an Operation window includes the following display-only fields.

- The Request field, which contains the name of the report you selected (e.g., "Account Profile Report")
- The Type field, which contains the type of operation you selected from the menu (i.e., 'R' for Report)

For each report, you identify the criteria TA should use to run the report. These criteria are called "parameters." Each report includes a Parameters block with a different set of parameters that you can select (i.e., the parameters you can enter are specific to the report you want to run).

For example, TA enables you to see information about the deposits your organization made during a specified period of time by using the Bank Reconciliation report. You enter the date range (i.e., a start date and end date) for which you want to see deposit information. The start and end dates you enter are the parameters for the report.

See Also:

[Standard Parameter Options](#)

[About the Additional Where Clause Parameter](#)

[Standard Report Parameters](#)

Standard Parameter Options

In the Request an Operation window include the specific options that you can control for any given report. Below is a summary of how you can enter the report parameters.

You can...	More Description
<p>Enter a single value to limit the report data.</p> <p>Or, enter multiple comma-separated values to limit the report data.</p>	<p>Most report parameters are associated with a list of values (i.e., a list of codes in TA) where you can press [F9] and select from the list. For example, if a report enables you to use activity type as a criterion, you enter the code for one of your organization's activity types in that parameter.</p> <p>Note: If you want to enter a value that contains a dash but is not a range, add double quotations around it. For example, in a parameter for GL Credit Account, enter "10-100" to report on the 10-100 general ledger account.</p> <p>Enter multiple codes separated by a comma or press [F9] to select from the list of values multiple times. The report reference documentation (specific to each report) indicates for which parameters you can enter a comma-separated list of values.</p>
<p>Enter a range of values such as a dollar amount range.</p>	<p>For example, if you use pledge amount as a parameter for a report, you can enter 35-149.99 to limit the report to records with a pledge amount between \$35 and \$149.99. Do not include any spaces within the range value. For example: A-Z is correct, but A - Z is not.</p> <p>If you want to enter a value that contains a dash but is not a range, add double quotations around it. For example, in a parameter for GL Credit Account, enter "10-100"."10-400" to report on general ledger accounts from 10-100 through 10-400.</p>
<p>Enter the wildcard (%) to represent multiple values for the parameter. You can also use the underscore symbol "_" as a wildcard to represent a single value.</p>	<p>Using the wildcard character is especially helpful if your organization uses naming conventions for specific codes.</p> <p>Use the wildcard to represent multiple values for a parameter. For example, if a report includes a parameter that enables you to use a source code as a criterion, you do not have to enter a complete source code. You can enter the first few letters of the source code followed by the wildcard, e.g., "AMQ%." The report limits the report to any source code that begins with the letters you entered.</p>
<p>Use reserved keywords such as "NULL," "ALL," and "NOT NULL"</p>	<p>Enter the word "ALL" to indicate that you do not want to use the parameter as a criterion for the report. For example, if you enter "ALL" in an activity type parameter, TA does not use activity type as a parameter for the report.</p> <p>Enter the word "NULL" to indicate that you want to limit the report to records without a value for that parameter. For example, you can enter the word "NULL" in an activity type parameter to limit the report to records without an activity type.</p> <p>Enter the words "NOT NULL" to limit the report to records with a value for that parameter. For example, if you enter "NOT NULL" in an activity type parameter, the report includes records with any activity type but does not include records without an activity type.</p>
<p>Exclude values for a parameter</p>	<p>Use the tilde symbol (~) before the value or values you want to exclude. For example, if you enter "~A" in an activity type parameter, the report excludes records with the activity type "A." If you enter "~A, C," the report excludes records with the activity type "A" or "C."</p>

See Also:

[Examples of the Standard Report Parameter Options](#)

Examples of the Standard Report Parameter Options

The following table lists the various options you have for setting a parameter that uses an account's activity as a criterion for the report.

Parameter	Result
AM	Limits the report to accounts with the activity "AM"
AM, AQ	Limits the report to accounts with the activity "AM" or "AQ"
A%	Limits the report to accounts with an activity that begins with "A" (i.e., activities within the "A" activity type)
ALL	Does not limit the report by activity
NULL	Limits the report to accounts where the activity is null (i.e., blank)
NOT NULL	Limits the report to accounts where activity is not null (i.e., blank)
~AM	Excludes accounts with the activity "AM"
~AQ, AM	Excludes accounts with the activity "AQ" or "AM"
~A%	Excludes accounts with an activity that begins with "A" (i.e., the activities within the "A" activity type)

About the Additional Where Clause Parameter

Some reports include an Additional Where Clause parameter in which you can define additional criteria for the report by entering a valid Structured Query Language (SQL) statement. When you enter information for this parameter, you reference the table from which the report selects records, a specific column for that table (i.e., a field stored for the record), and a value for that column (i.e., field).

Note: Refer to the TSI File Layouts for a complete list of the tables and columns in TA.

For example, TA includes the Interaction Comparison report to enable your organization to compare interactions for two fiscal years. In addition to defining the fiscal years you want to compare, you can further restrict the interactions the report compares by entering an additional where clause. Each interaction in TA is assigned to an interaction category that groups interactions with a similar purpose (e.g., solicitation, member service). If you want to compare interactions for the member service interaction category, you can enter "i.contact_category='MS'" in the Additional Where Clause parameter where "i" represents the table you are referencing, "contact_category" represents the column name, and "MS" represents the column value.

You can use the additional where clause to include or exclude one or more values for the report. To include an additional where clause in a report, enter the SQL statement in one of the following formats.

- t.column_name='column value'
- t.column_name in ('column value', 'column value')
- t.column_name <> 'column value'
- t.column_name not in ('column value', 'column value')

Note: The letter "t" represents the table's alias name (i.e., a shortened name for the table). Use the table's alias name for all of the reports.

See Also:

[Examples of the Additional Where Clause](#)

[List of Table Alias Names](#)

Examples of the Additional Where Clause

The following table lists several examples of the Additional Where Clause parameter for the [Interaction Comparison report](#) and explains the result of each SQL statement on the report.

Example	Result
i.contact_category='MS'	Includes in the report only interactions that map to the interaction category "MS" for member service
i.contact_category in ('MS', 'PS')	Includes in the report only interactions that map to the interaction category "MS" for member service or "PS" for program service
i.contact_category<>'MS'	Excludes from the report any interactions that map to the interaction category "MS" for member service
i.contact_category not in ('MS', 'PS')	Excludes from the report any interactions that map to the interaction category "MS" for member service or "PS" for program service

Note: The letter "i" is the alias for the Interactions table.

List of Table Alias Names

Below is a list of TA tables with their corresponding alias names. Use the table's alias name when using the [Additional Where Clause parameter](#).

Table Name	Alias Name
accounts	a
account_activity	aa
activity_status	ast
addresses	ad
batch_summary	bs
benefits	b
bequests	bq
brief_names	bn
classifications	c
classification_code	cc
classification_value	cv
current_transactions	ct
fund	f
giving_level	gl
interactions	i
interaction_projects	ip

names	n
office	o
programs	p
prospect_ratings	pr
&qo_table (=qo_temp_output_1-18)	qto
rater_familiarity	rf
rating	r
salutations	sl
sources	s
source_analysis	sa
system_status	ss
transactions	t
transaction_benefits	tb

Standard Report Parameters

Each report in TA includes the following parameters.

Parameter	More Description
Copies	Enter in the Copies parameter the number of copies of the report TA should print. In most cases, this parameter is set to "1" for all reports.
Print Format	<p>You can set the Print Format parameter to any one of the following three values.</p> <ul style="list-style-type: none"> "DFLT" (i.e., postscript) "PDF" (i.e., Portable Document Format) "QUOLABEL_EPS" (i.e., Mainframe Label Format) <p>TA defaults this parameter to the Default Print Format system preference.</p>
Filename	<p>Set the Filename parameter to identify the path and filename for the report.</p> <ul style="list-style-type: none"> TA defaults this parameter to your organization's default output directory. If there is no default output directory, TA uses the Output Files system preference path. TA defaults the name of the file for the report. TA includes a timestamp at the end of the filename if the Add Timestamp to Output Files? system preference is set to "Y." TA determines the file extension from the Default Report Extension system preference unless the Default Report Extension from Format system preference is set to "Y," in which case the Print Format parameter determines the file extension. <p>You can set the Default Report Extension parameter to any one of the following three values.</p> <ul style="list-style-type: none"> "PS" (i.e., postscript) "PDF" (i.e., Portable Document Format) "LIS" (i.e., Mainframe Label Format)

<p>Output Destination</p> <p>See Also: "Processing a Report on Your PC" "Processing a Report on the Database Server"</p>	<p>The Output Destination parameter determines how TA processes your report. You can set the Output Destination parameter to any one of the following three values.</p> <ul style="list-style-type: none"> • "FILE" • "PREVIEW" • "PRINTER" <p>By default, TA sets this parameter from the Default Output Destination system preference. The report print commands (i.e. View, Submit, Exit) and the Print Format parameter also determine the value for this parameter.</p> <ul style="list-style-type: none"> • When the Default Output Destination system preference is set to PREVIEW, click <View> to view the report. If you click <Submit> instead of <View>, TA automatically changes the print destination to "PRINTER." • When the Default Output Destination system preference is set to PREVIEW or PRINTER, set the Print Format to "PS, for postscript." If the Print Format parameter is set to "PDF", for Portable Document Format, TA automatically changes the print destination to "FILE."
<p>Printer Name</p>	<p>Use the Printer Name parameter to specify the printer to which your report should print when you click <Submit>. TA defaults this parameter to "Default." You can change the Printer Name parameter. Press the [F9] key to view the list of available printers. If you don't change the parameter, TA sends the report to the printer identified by the Default Printer system preference.</p>
<p>Delimiter</p>	<p>You can use the Delimiter parameter to specify the delimiter to use when downloading reports in a delimited format. The delimited format means that each value is separated from the next value by a "delimiter." The delimiter can be one or more characters. For example, you could set the Delimiter parameter to "," to have TA use a comma as a delimiter.</p> <p>Click here for a list of reports that you can generate in a delimited format.</p>

See Also:

[List of Reports That you can Generate in a Delimited Format](#)

List of Reports That You Can Generate in a Delimited Format

You can use the Delimiter parameter to specify the delimiter to use when downloading reports in a delimited format. The delimited format means that each value is separated from the next value by a "delimiter." The delimiter can be one or more characters. For example, you could set the Delimiter parameter to "," to have TA use a comma as a delimiter.

Note: As of version 5.0x, the following are the only reports that can be run in a delimited format:

- Account Statistics Report
- Adjustment Report
- Benefit Auto-Renewal Error Report
- Benefit Auto-Renewal Summary Report
- Interaction Statistics Report
- Matching Company Employees
- Pledge and Paid Statistics Report
- Pledge Fulfillment by Program Type
- Pledge Inquiry by Day Report
- Pledge Summary Report
- Pledge and Payments by Program
- Response Report
- Revenue Statistics Report

- Upgrade/Downgrade Gifts Report
- Underwriting Contract Master Report
- Primary Solicitor by Solicitor Group
- Event Summary Report
- Team Analysis Report
- Program Interaction Report
- Marketing and Source Code Listing
- Source Analysis Sample Data Report
- Premium Count by Group
- Premium Label Report
- Renewal Statistics Report
- Renewal Summary Report
- Marketing Response Summary Report
- Direct Marketing Summary Report
- Marketing Response Summary Report
- Response Report
- User-defined output Listing Report
- Label Generation
- Delete Processing Status Report
- Schedule Operation Listing
- Attribute Definition Listing

Also note that reports that generate in delimited output will have column headings that repeat for every row of data returned, so these reports may need some cleaning up.

Fiscal and Calendar Date Parameters

In many reports, TA enables you to use a date or date range as a parameter for the report. For example, when you run the Bank Reconciliation report, you can enter the month for which you want to see your organization's deposit information.

You use one of the following date types when you enter the parameters for the report.

- Calendar dates, i.e., dates based on the calendar year beginning in January and ending in December
- Fiscal dates, i.e., dates based on the 12-month period for which your organization plans the use of its funds

For each report, look at the parameter name and the status bar hint to determine which type of date to use for the report.

See Also:

[Date Type Parameter and Calendar Dates in Reports](#)

[Using Fiscal Dates in Reports](#)

Date Type Parameter and Calendar Dates in Reports

Certain reports include a Date Type parameter to enable you to choose which type of date to use for the report (i.e., calendar or fiscal). For example, a transaction (e.g., gift) in TA includes both the calendar date and the fiscal month and year of the transaction. When you run the Revenue Statistics report, which reports on your organization's transactions, you can use either calendar dates or fiscal dates to limit the transactions that TA selects for the report.

From the Date Type parameter, press the [F9] key and select the appropriate date type.

You can enter calendar dates as absolute values (e.g., "January 31, 1999" or as relative values (e.g., "the first day of last month"). You can mix absolute values and relative values in the same report.

See Also:

[Entering Absolute and Relative Calendar Dates](#)

Entering Absolute and Relative Calendar Dates

To enter a calendar date as an absolute value, enter the date in the MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year (e.g., 04/24/99). Enter dates using relative values, when you schedule a report to run on a regular frequency and be assured that the dates for the report are correct. When you enter a relative calendar date, you create an expression that represents the calendar date relative to the date the report is run. Relative date information is not case sensitive. You can mix absolute and relative date references in the same report. You cannot reference both days and months in the same parameter, e.g., the expression "Last - 2 + 3M" is not valid and produces an error in your report.

To enter a relative calendar date, enter it in this format:

- Placeholder [+ or -] Number of days or number of months;

"Placeholder" is one of the following words or letters.

- Today (or the letter "T") for the current date
- First (or the letter "F") for the first day of the current month
- Last (or the letter "L") for the last day of the current month

For example, "**Today - 2**" refers to the day before yesterday while the expression "**First - 1M**" is the first day of last month.

Note: For reports that are scheduled to run nightly, and they are scheduled to run after midnight (for example 3/14/03 00:30:00), the report considers the **T** date parameter to be the day before the run date (equivalent to 3/13/03 in our example). Everything run before 6:00AM is considered part of the previous day's work.

The following chart contains the calendar date values TA uses for a report based on the relative values you enter. This chart assumes that the current calendar date is March 15, 2003.

<u>Values Entered</u>	<u>Value TA Uses For Reporting</u>
Today	3/15/03
T	3/15/03
T-5	3/10/03
First	3/1/03
First -1	2/28/03
T-1M	2/15/03
Last	3/31/03
L-6M	9/30/02
F-6M	9/1/02

Using Fiscal Dates in Reports

You can enter fiscal dates as absolute values (e.g., "the fourth month of the current fiscal year") or as relative values (e.g., "the last fiscal month"). You can mix absolute values and relative values in the same report.

See Also:

[Entering Absolute and Relative Fiscal Dates](#)

Entering Absolute and Relative Fiscal Dates

To enter a fiscal date as an absolute value, enter the fiscal year in YYYY format where "YYYY" is a four digit number (e.g., 1999) and the fiscal month is a number between one and 12 (e.g., 9).

Note: When you enter the entire fiscal date as one parameter (i.e., the report does not include separate parameters for fiscal year and fiscal month), you enter the fiscal date in the format MM/YYYY where "MM" is the fiscal month and "YYYY" is the fiscal year.

Using relative values, you can schedule a report to run on a regular frequency and be assured that the dates for the report are correct.

When you enter a relative fiscal date, you create an expression that represents the date relative to the current fiscal month and year. TA calculates the fiscal year and month based on the [Current Fiscal Year](#) and [Current Fiscal Month](#) system preferences and the expression you enter.

To enter a relative fiscal date, use the format "Current [Operator] N" where "Current" is the current fiscal year or month; "Operator" is either the plus sign, "+," for addition or the minus sign, "-", for subtraction; and "N" represents the number of years or months.

For example, if you enter the expression "Current - 1" for the fiscal year and the Current Fiscal Year system preference is set to 1999, TA runs the report for the fiscal year 1998 (i.e., the previous fiscal year).

Note: You can use the letter "C" instead of the word "current" to represent the current month or year.

TA updates the Current Fiscal Year and Current Fiscal Month system preferences when your organization runs month-end processing.

The following table contains the fiscal year and month values TA uses for a report based on the relative values you enter. This table assumes that the Current Fiscal Year system preference is set to 1999 and the Current Fiscal Month system preference is set to 6.

Note: All relative date information is case insensitive.

Values Entered		Value TA Uses for Reporting	
Fiscal Month	Fiscal Year	Fiscal Month	Fiscal Year
Current	Current	6	1999
C	C-1	6	1998
C-1	C	5	1999
C-1	1999	5	1999
C-5	C	1	1999
1	C	1	1999
C-6	C	12	1998
C-2	C-1	4	1998
C+1	C-1	7	1998

Note: When you enter the entire fiscal date as one parameter (i.e., the report does not include separate parameters for fiscal year and fiscal month), you enter the fiscal month expression followed by the fiscal year expression. For example, enter C-1/C for the previous fiscal month of the current fiscal year.

Processing a Report in TA

When you run a report in TA, you can process the report in one of two ways.

- You can process the report on your PC: If you process the report on your PC, you cannot use your PC until TA finishes processing the report.
- You can process the report on the database server: The database server is a more powerful PC than the PC you use, resulting in a shorter amount of time to process and print the report than required if you process the report on your PC. If you process the report on the database server, you can continue working on your PC while TA processes the report.

Note: TSI does not recommend processing any reports on your PC except code listings because the remaining TA reports are process-intensive and may cause your PC to stop responding. For each report, your organization decides whether to set the [Server Exclusive? preference](#) for the report to "Y" for yes (on the System Preference Administration screen) to prohibit you from processing the report on your PC.

See Also:

[Processing a Report on Your PC](#)

[Processing a Report on the Database Server](#)

[Exiting Without Processing the Report](#)

Processing a Report on Your PC

Click <View> to process the report on your PC.

When you click <View>, TA references the Output Destination parameter to determine how to process your request. TA processes the report in one of the following ways.

- If the Output Destination parameter is set to "PREVIEW," TA displays the report on screen.
- If the Output Destination parameter is set to "PRINTER," TA prints the report to your Windows default printer.
- If the Output Destination parameter is set to "FILE," TA saves the report to a file on your PC or on your network file server, if you have one. If you want TA to save the report to a file on your PC or on your network file server, you must enter the path and filename in the Filename parameter. The file format defaults according to your settings for the [Default Print Format preference](#).

Note: The <View> button does not appear on the Request an Operation window if your organization has indicated that the report should only be processed on the database server.

Processing a Report on the Database Server

Click <Submit> to process the report on the database server (i.e., the report is compiled by the PC on which the TA data is stored).

When you click <Submit>, TA references the **Output Destination** parameter to determine how to process your request.

- If the Output Destination parameter is set to "PRINTER" or to "PREVIEW," TA compiles the report on the database server without saving a file for the report (only a temporary file is created) and prints the report on the printer specified in the Printer Name parameter.
- If the Output Destination parameter is set to "FILE," TA saves the report as a file based on the path and filename in the Filename parameter. The file format defaults according to your settings for the [Default Print Format preference](#).

Exiting Without Processing the Report

Click <Exit> to exit the Request an Operation window without running the report.

If you selected the report from the Main Menu, you return to the Main Menu when you exit the Request an Operation window. If you selected the report by clicking <Report> on the toolbar, you return to the screen from which you accessed the report. For example, you select the Account Profile Report by clicking <Report> on the toolbar from the Account Overview screen. If you click <Exit> from the Request an Operation window, you return to the Account Overview screen.

Viewing the Status and Parameters for a Report

When you click <View> or <Submit> to process a report, TA assigns the "job" a request number. You can view the status of the job by selecting Request Status from the System menu on the menu bar. TA displays the Submitted Requests window. To view the parameters for a request, highlight the request and click the <Zoom> button to the left of the request, or press [F10]. To view errors for a request, press Control - [F10].

Running the Report Associated with the Current Screen

TA enables you to run the report associated with a screen without returning to a menu (e.g., the Main Menu) to select the report. You can access the report associated with the current screen in any one of the following ways.

- Press the [Print Report] key.
- Click <Report> on the toolbar.
- Select Report from the Options menu on the menu bar.

Only certain screens in TA are associated with a report. If you try to execute the [Print Report] function from a screen for which no report is associated, TA displays in the status bar the error message "No report is associated with this screen."

Report Descriptions

Below is a list of the end user report documents in Team Approach[®]. For a brief description, click on the corresponding report name. In parentheses is the document's filename including the text "V##." This represents the version of TA for which the document is written. For example, the version 3.6 Account Reports are located in a document named: **AMRTV36.doc**

{button Account Reports,JumpID(' AccRepts')}	{button Gifts and Pledges Reports,JumpID(' GM Rep')}	{button Events and Volunteers Reports,JumpID(' E VRpt')}
{button Interaction Reports,JumpID(' I nRpt')}	{button Major Gift Reports,JumpID(' C MGGRpt')}	{button Management Reports,JumpID(' M ngmntReps')}
{button Planned Giving Reports,JumpID(' PG Rpt')}	{button Matching Gift Reports,JumpID(' MGRpt')}	{button Benefits Reports,JumpID(' B enefit_Reports')}

[# Account Reports \(AMRTV##.doc\)](#)

[Account File Statistics Report](#)

AccRepts

[Account Listing Report](#)
[Account Profile Report](#)
[Prospect Coordination Report](#)
[Merge Detail Report](#)
[Merge Control Report](#)
[Merge Errors Report](#)
[Prospect Ratings Report](#)

#[Gifts and Pledges Reports \(GMRTV##.doc\)](#)

[Adjustment Report](#)
[Bank Reconciliation Report](#)
[Batch Detail Report](#)
[Batch Summary Report](#)
[Batch Target Totals](#)
[Benefit Auto-Renewal Detail Report](#)
[Benefit Auto-Renewal Error Report](#)
[Benefit Auto-Renewal Summary Report](#)
[Development Transmittal Report](#)
[Donor Giving Summary](#)
[Donors with Open Pledges Report](#)
[Gift by Donor Classification Report](#)
[Gift Comparison for Fiscal Years Report](#)
[Gift Summary Report](#)
[Lapsed Auto-Renewable Donors Report](#)
[Open Stock Pledge Report](#)
[Pledge Aging Report](#)
[Pledge Fulfillment by Program Type Report](#)
[Pledge Inquiry by Day Report](#)
[Pledge Schedule Report](#)
[Pledge Summary Report](#)
[Pledge Totals by Day Report](#)
[Pledges and Payments by Program Report](#)
[Project Gift Analysis Report](#)
[Project Progress Report](#)
[Refund Report](#)
[Related Donor Giving Report](#)
[Revenue by Batch Type Report](#)
[Stock Batch Detail Report](#)
[Transaction Summary Report](#)
[Transaction Analysis Report](#)
[Upgrade/Downgrade Gifts Report](#)

#[Interaction Reports \(INRTV##.doc\)](#)

[Interaction by Technique Report](#)
[Interaction Comparison Report](#)
[Interaction Statistics Report](#)

GMRep

InRpt

[Interaction Summary Report](#)

[Interaction Value Report](#)

[Open Ticker Listing Report](#)

[Program Interaction Report](#)

[Service Provider Listing](#)

#[Corporate Gift, Major Gift, and Grant Reports \(MGRTV##.doc\)](#)

[Requested Gifts Summary Report](#)

[Underwriting Contract Master Report](#)

[Underwriting Contract Summary Report](#)

[SPC Acquisition Report](#)

[Underwriting Financial Report](#)

#[Planned Giving Reports \(PGRTV##.doc\)](#)

[Planned Giving Analysis Report](#)

[Planned Giving Profile Report](#)

[Planned Giving Summary Report](#)

#[Matching Gifts Reports \(MCRTV##.doc\)](#)

[Matching Company Employees Report](#)

[Matching Company Gifts Status Report](#)

[Matching Gift Reconciliation Listing](#)

#[Events and Volunteers Reports \(MVRTV##.doc\)](#)

[Committee Listing](#)

[Event Budget Items Report](#)

[Event Group Listing](#)

[Event Profile Report](#)

[Event Roster Report](#)

[Event Summary Report](#)

[Event Host and Guest Report](#)

[Participant Pledge Report](#)

[Registration & Participation Report](#)

[Registration Edit Report](#)

[Registration Fees Due Report](#)

[Team Analysis Report](#)

[Team List Report](#)

#[Management Reports \(MRRTV##.doc\)](#)

[Account Statistics Report](#)

[Affiliate Revenue by GL Category Report](#)

[Affiliate Shared Revenue Report](#)

CMGGRpt

PGRpt

MGRpt

EVRpt

MngmntReps

[Direct Marketing Response Report](#)
[Income Comparison Report](#)
[Marketing Response Summary Report](#)
[Monthly Income Analysis Report](#)
[Pledge and Paid Statistics Report](#)
[Renewal Statistics Report](#)
[Renewal Summary Report](#)
[Response Report](#)
[Retention Rate Report](#)
[Revenue Statistics by Marketing Code Report](#)
[Revenue Statistics Report](#)
[Solicitation Response Report](#)

[#Benefits Reports \(MBRTV##.doc\)](#)

[Benefit Inventory Listing Report](#)
[Benefit Listing Report](#)
[Extended Premium Listing Report](#)
[Benefits and Programs by Pledge Break Report](#)
[Premium Count by Group Report](#)
[Premium Listing Report](#)
[Premium Detail by Marketing Code Report](#)
[Premium Summary by Marketing Code Report](#)
[Premiums by Program Report](#)
[Premiums by Program and Break Report](#)
[Premiums Delivered/Requested Detail Report](#)
[Premiums Ordered Report](#)
[Premiums Requested for Pledge Report](#)

Account File Statistics Report

The Account File Statistics report enables you to see summary information for a set of accounts involved in a particular activity type or activity. Within the activity type or activity you specify, the report totals the number of active and inactive accounts for account activity status, account category, account gender, track, giving level, solicitation cycle and the specified classification codes.

Account Listing Report

The Account Listing report enables you to view information for a group of accounts involved in a specific activity or giving level. For each account included in the report, the report prints account name and address information, membership renewal and expiration dates if the account has a membership as well as a snapshot of the most recent gift for each account within the activity or giving level you set in the report parameters. You can use this report to print contact information for all your mid-level donors who have not renewed their membership within the past 24 months so that you can conduct a phone survey to find out why they haven't renewed.

Account Profile Report

The Account Profile report enables you to view account, transaction, interaction, and volunteer information for a specific account. You can run this report for one or more accounts at a time. You select the account-based

Benefit_Reports

information that you want to include by setting the parameters for the report. This report can include *all* account, transaction, interaction and volunteer information for the account(s). You can use this report to review a donor or prospect's history (both transactions and interactions), planned gift records, and personal interests (e.g., classifications, interests, and notes on the account).

Prospect Coordination Report

The Prospect Coordination Report enables you to view accounts that are prospects for your organization, based on the prospect director (i.e., team leader) and team members responsible for the account. You can use this report to print a list of accounts and their contact information to prepare for a meeting about prospect directors' progress in working with each major gift prospect account.

Merge Detail Report

The Merge Detail report enables you to see how the account-based information for duplicate accounts will be merged. You can run the report for any accounts for which a merge record exists, and you can limit the merge records included in the report based on merge status. You can run this report before running merge processing to ensure that you have correctly set up the merge processing for two duplicate accounts. The report is also useful for reviewing merge records created by the duplicate detection procedure (a new feature of TA version 3.1).

Merge Control Report

The Merge Control Report summarizes merge statistics for each submitted merge process. In addition to statistical summary information on successfully completed merges, this report tracks the number of retained records added and the number of duplicates encountered for the major tables that merge processing handles. TA automatically runs the Merge Control report each time you submit a merge process. You may also run the report by selecting it from the menu. Note that the report data is overwritten each time a merge process is submitted.

Merge Errors Report

The Merge Errors report lists any Oracle errors that occurred during merge processing for a pair of accounts. When an Oracle error prevents merge processing from completing, TA sets the status of the merge record to "E" for errors. The report can also include merge records that did not process in error (i.e., the merge processed successfully and the status of the merge record is "C" for completed). TA includes such merge records to explicitly identify how certain records were processed, e.g., how the merge process updated the salutation records for the merged account.

Prospect Ratings Report

In TA, you can create a rating record for an account each time a staff member or a peer of the account rates the likelihood of the account giving to your organization. The Prospect Ratings Report enables you to see rating information for an account or group of accounts. You can run this report to see whether rating information for one account is consistent among several different raters.

Adjustment Report

The Adjustment report enables you to view information about adjustments to transactions (e.g., gifts or pledges). When TA creates an adjustment, TA creates a negative transaction for the original transaction and creates a new transaction that contains the correct information. On the Adjustment Report, TA orders the information by account and displays separate lines for the original transaction, the reverse transaction, and the adjustment transaction information. For each adjustment, the report includes contact and payment information for the account. You can use this report to review adjustments made during the last fiscal month or to view refunds for transactions that were originally made during a specific time period and that were credited to a selected fund.

Bank Reconciliation Report

The Bank Reconciliation report enables you to view your organization's deposit amounts for a time period you specify, e.g., for a particular fiscal month. The report prints the following information for each batch deposited during the date range you specify: deposit date, deposit location, deposit amount, debit account, batch number, batch type and the username of the person who created the batch. You can use this report to reconcile your accounting statements for a specified time period with the information entered in TA.

Batch Detail Report

The Batch Detail report enables you to view information for each batch item (e.g., gifts or pledges) within the batches you specify. You can use this report, for example, to review an unbalanced batch or a batch with errors instead of reviewing the batch on-line. Or you might run this report to view a group of batches containing errors by indicating the range of batch numbers or the date range during which the batches were deposited. Also, this report is automatically generated when you run the Post Gift Batch and Account Data Upload procedures. TA uses the default report parameters, as they are setup in system preferences or you may adjust the parameters when you run these procedures.

Batch Summary Report

The Batch Summary report enables you to view target and actual batch amounts as well as other information for a set of batches that you identify by specifying a calendar or fiscal date range, a specific batch or range of batches, the status of the batch(es), the transaction type, the deposit location, and/or the user inserting the batch. You can use this report, for example, to see how many batches remain open before you can close the month. For each batch you specify, the report prints the batch default transaction type and payment method, deposit location and date, target and actual totals, user name of the person who created the batch, batch status, number of errors and the batch processed date (if applicable). Also, this report is automatically generated when you run the Post Gift Batch and Account Data Upload procedures. TA uses the default report parameters, as they are setup in system preferences or you may adjust the parameters when you run these procedures.

Batch Target Totals

The Batch Target Totals report enables you to view, by payment method, the pledge and payment totals for batches you identify by specifying a date range (either calendar or fiscal), a specific batch or range of batches, and/or the status of the batch(es). For example, you can use this report to view, by payment method, the pledge and payment totals of batches that have a deposit date within the last week and a status of "E" for error. For each batch included in the report, the report prints the batch number, number of pledges and payments, amounts of pledges and payments and total number of pieces, along with grand totals for all batches included in the report.

Benefit Auto-Renewal Detail Report

The Benefit Auto-Renewal Detail report displays the detail of the pledge transactions that are created when you run the Benefit Auto-Renewal procedure. This report includes batch and pledge numbers, pledge amount and gift date, account ID, name and address, as well as the benefits awarded. Note that the Benefit Auto-Renewal Detail report is automatically generated when you run the Benefit Auto-Renewal procedure.

Benefit Auto-Renewal Error Report

The Benefit Auto-Renewal Error report displays information about the errors that the Benefit Auto-Renewal procedure incurs when creating new batch items. Note that the Benefit Auto-Renewal Error report is automatically generated when you run the Benefit Auto-Renewal procedure.

Benefit Auto-Renewal Summary Report

The Benefit Auto-Renewal Summary report displays summary information about the pledge transactions that are created when you run the Benefit Auto-Renewal procedure. For each batch created, this report includes batch summary totals, totals by gift kind, and a summary totals of errors (if any). Note that the Benefit Auto-Renewal Summary report is automatically generated when you run the Benefit Auto-Renewal procedure.

Development Transmittal Report

The Development Transmittal report enables you to view information for a specific item in a particular batch. For example, you review a major donor's giving history on the Giving History Summary screen and want to print details for a particular gift from the donor. For the selected batch item, TA prints the following: donor contact information, batch identification information, transaction details, premium information, acknowledgement information, matching company transaction information, solicitor information, and comments.

Donor Giving Summary

The Donor Giving Summary report enables you to view donor, account activity, and gift detail information for accounts you identify by specifying Account ID, activity type, current activity, prior activity, and/or account expiration date. For each donor included in the report, you can view donor contact information, average gift, and summary information for the highest and most recent pledges. For each account activity, TA prints summary information for the average, highest and most recent pledges. You can also choose to include detail information for each gift in the report. You can use this report to get an overview of the selected donor's giving to a particular activity, or to view a summary of all the transactions for the selected donor.

Donors with Open Pledges Report

The Donors with Open Pledges report enables you to view donors with open pledges who have had financial activity during a time period that you specify. An open pledge is one that is unfulfilled or partially fulfilled. You can use this report to determine if a gift, i.e., a transaction with the transaction type of "GF," shouldn't have been entered as a gift but should have been applied to an open pledge. For each donor, the report lists the donor's financial activity during the time period selected, along with each open pledge. The report clearly identifies each open pledge with the label "Open Pledge."

Gift by Donor Classification Report

The Gift by Donor Classification report enables you to view transactions and donor information for donors with the classification(s) you specify in the report parameters. You can select transactions and their corresponding donors by specifying a gift date range, an amount, and an alphabetical range for the donor last name. For example, you can run this report to view transactions between \$150 and \$250 that were made in the last week by accounts with the "No Mail" or "No Phone" appeal preferences.

Gift Comparison for Fiscal Years Report

The Gift Comparison for Fiscal Years report enables you to compare for two fiscal years the revenue for a specific activity and campaign, e.g., Annual Giving Major Donor Additional Gift campaigns for fiscal year 1999 as compared to fiscal year 1998. For each fiscal year specified in the report parameters, TA includes the following information for each account listed in the report: the account name line, the Account ID, the number of transactions, and the total amount of gifts and pledges. In addition, TA prints the difference in transaction amount, the percent change (% D) for the number of transactions and the percent change for the total amount of transactions from the first fiscal year to the next for each account. Finally, TA prints an overall total for each of the transaction count, transaction amount and percent change columns listed in the report.

Gift Summary Report

The Gift Summary report enables you to view summary account and financial information for each transaction within the date range you set in the report parameters. You can select transactions based on the current account activity, activity type of the transaction, transaction type, and/or minimum transaction amount. You can order the report by Account ID, alpha name, expiration date of the current membership (if applicable), or by zip code. For example, you can print an alphabetical list of accounts that made pledges of at least \$10,000 toward the capital campaign activity type within the last month. For each transaction selected, TA includes the account's contact information, transaction details, and the benefit codes for the benefits awarded.

Lapsed Auto-Renewable Donors Report

The Lapsed Auto-Renewable Donors report enables you to list accounts that should have been automatically renewed within an activity type but instead have a status of lapsed for that activity type. When you submit this report for printing, you can specify the activity type, e.g., "A" for Annual Giving. TA identifies automatically renewable accounts by selecting those accounts to which the "Auto-renew" classification code has been assigned. This report lists the Account ID, the account's name, the classification value assigned to the account, and the account's expiration date. Your organization can use this report to investigate the reason for which an account's membership was not automatically-renewed.

Open Stock Pledge Report

The Open Stock Pledge report enables you to view open stock pledges, grouped by broker, for stock pledges that you identify by specifying a brokerage Account ID and/or a pledge status (e.g., unfulfilled, partially fulfilled). For example, you can use this report to view all unfulfilled stock pledges, by broker. The report includes information for each broker included in the report as well as the following information for each stock pledge: Ticker symbol, stock name, number of shares, fair market value, donor Account ID, and donor name.

Pledge Aging Report

Run the Pledge Aging report to view the number of pledge payments made and either the total amount you expected to receive or the total amount still outstanding for payments you expected to receive within time periods you specify. For example, you could run this report to see the total amount pledged, paid, due, and past due in 2002. For the 2002 pledges, you can also review how many payments and the total amount of the payments you received each quarter and how much money is outstanding for pledges made in 2002.

This report has two formats: a detail format and a summary format. Both formats allow you see the following standard information: Pledge Amount, Paid Amount, and either amount expected or amount still due within the time period you specify. When you run this report in the detail format – by setting the Break Group 1 parameter to Pledge Number (Transactions) – the account ID, account name and pledge number is printed for each pledge selected in the report.

Pledge Fulfillment by Program Type Report

The Pledge Fulfillment by Program Type report enables you to compare the total pledges made and the total pledges fulfilled for each program or for each program type (e.g., cooking shows, drama). You can specify the date range, activity, campaign, and initiative for which to compare the pledge totals. For each program or program type, TA includes the total number of pledges, the percent of total pledges, the pledge amount and the percent of the total amount pledged. TA includes these figures for the pledges paid and calculates the percent of pledges paid based on the number and the dollar amount paid. TA also includes report totals for all pledges, paid pledges, and percent of pledges fulfilled.

Pledge Inquiry by Day Report

The Pledge Inquiry by Day report enables you to view actual and estimated pledge information for pledge drives. You can select the pledges by gift date range, activity, campaign, initiative and effort. The report prints information based on the break group that you set: source; program; program type; program and source; or day, program and source.

Within each break group, you can sort the report in ascending or descending order by actual pledge amount, amount pledged/minute, or source.

Pledge Schedule Report

The Pledge Schedule report enables you to view pledge and payment schedule information for pledges that are to be paid on an installment schedule. You can use this report to estimate the amount of money that your organization is due to receive in pledges over the next five fiscal years for a particular project, activity, source code, and/or fund.

Pledge Summary Report

The Pledge Summary report enables you to view account, pledge, and payment information for a set of transactions that you identify by setting the report parameters. For example, you can use this report to view partially fulfilled and unfulfilled pledges of at least \$100 that are credited to an annual giving source code and have a processed date in July, 1999. For each transaction in the report, TA includes contact information for the donor and pledge details, including the paid-to-date amount and balance due for the pledge. At the end of the report, TA prints totals for the number of pledges, the number of payments, the paid amount, and the number of items included in the report. You can sort this report by Account ID, alpha name, expiration date of the current activity, or giving vehicle.

Pledge Totals by Day Report

The Pledge Totals by Day report enables you to view pledge totals and averages for pledge drives. The report includes additional information based on the break group you select. You can choose from the following break groups: source; program; program type; program and source; or day, program and source. For example, you can run this report to view a set of pledges with totals for each day, broken out by program, and further broken out by pledge break.

Pledges and Payments by Program Report

The Pledges and Payments by Program report enables you to view summary financial information for payments and pledges within a certain date range, grouped by program. For example, you can view the average pledge and average payment amounts for your most recent pledge drive. You can select the transactions by activity, campaign and initiative.

For each program listed in the report, TA prints the program code, program name and NOLA code. TA also prints the number of pledges, pledge amount, average pledge, number of payments, payment amount and average payment, percent of pledges fulfilled, break minutes and payment amounts per minute. Finally, TA prints report totals for each column listed above.

Project Gift Analysis Report

The Project Gift Analysis report enables you to view cumulative pledge and payment information for your fundraising campaigns as well as specific pledge and payment information for each donor. You can select transactions based on the master project, project, payment method for outright gifts, giving vehicle for planned gifts, gift amount, account type, activity type, and/or date range. For example, you can run the Project Gift Analysis report to view transactions of at least \$250 that were credited to a capital campaign master project in the last month.

TA prints totals for each project and then breaks each project into outright gifts and planned gifts. Within the outright gifts section, TA groups the transactions by payment method. For each donor who has made an outright gift, TA includes contact information and gift information, including pledge and payment amount, fund, and activity type for the gift. Within the planned gifts section, TA groups the donor information by giving vehicle and prints the total expected or principal amount for each giving vehicle. For each donor who has made a planned gift, TA includes contact information, the estimated amount of the planned gift (i.e., expected amount for bequest planned gifts and principal amount for annuity planned gifts), and the fund to which it is to be applied.

Project Progress Report

The Project Progress report enables you to view goal and revenue information for your fundraising campaigns based on the project start date, master project, project, stage of the account project records associated with the project, and/or solicitor assigned to the project. For example, you can run this report to view information for all of the projects with a start date during the previous month that are assigned to a particular solicitor. For each project included in the report, TA includes the following information: goal and actual amounts received; number and dollar amount of asks outstanding; and project start date. You can also run the report at the donor detail level to view contact information and transaction details for donors associated with the selected projects.

Refund Report

The Refund report enables you to view information about refunds to transactions (e.g., gifts or pledges). For each refund (a refund is an adjustment with the adjustment code "RF"), the report includes the donor's contact information, gift transaction details and adjustment (i.e., refund) transaction details. You can select refunds according to payment method, gift date or refund date, credit account, fund, and/or gift type. For example, you can run this report to look at credit card refunds that were made during the last fiscal month for new membership gifts.

Related Donor Giving Report

The Related Donor Giving report enables your organization to view specific and cumulative gift information for related accounts by specifying Account ID, relationship type, fiscal year range, and/or source code(s). For example, your organization can use this report to see the giving histories of accounts related to your board members within a fiscal year range that you specify. For each related account, the report displays the relationship type, related donor's Account ID, name, primary address, salutation, first and last gift date, and total donations. The report also lists the gift date, source, and payment amount for gifts made within the specified fiscal years and sums the number and amount of gifts for each donor within each fiscal year.

Revenue by Batch Type Report

The Revenue by Batch Type report enables you to view revenue information and batch summary information for open and recently processed batches by batch type. TA includes the batch type, credit account, batch deposit date, batch number, total payments, total payment amounts and batch status, and prints report totals for the number of batches, total payments and total payment amounts. You can use this report to balance the information for each batch uploaded or entered into TA with information from your data entry vendor(s), lockbox, bank, or accounting department.

Stock Batch Detail Report

The Stock Batch Detail report enables you to view stock information for each gift and pledge payment within the batches you specify by setting the batch number, payment method, gift date, and/or user who entered the batch. For example, you can use this report to look at all of the gifts and pledge payments that were entered in stock batches and deposited within the last month. The report includes information for each gift and pledge payment, and includes stock information for each stock batch item.

Transaction Analysis Report

The Transaction Analysis report enables you to pull Totals and counts for pledge and gift transactions (including zero dollar transactions) in a report that displays the following information:

- Amount pledged
- Amount of pledges paid
- Amount remaining to be paid on the pledges

--Amount given in gifts (GF transactions)
--Amount committed through pledges or gifts
--Amount paid so far
--Number of pledge and gift transactions
--Number of donors (distinct Account ID/Name IDs) selected by report
TA totals the rows at the end of the report.

For example, you can run this report to get information about event registration and participation dollars by source code. There is a Page Break parameter and three Break Group parameters to enable you to group transactions by any queryable fields in the Transactions table. The report also includes date range parameters and a series of filter parameters that allow single or comma-separated list of values. In addition to Fiscal or Calendar date ranges, you can limit the report by: Event, Credit Account, Activity Type, Activity, Campaign, Initiative, Effort. There is also an Additional Where Clause parameter that you can use to limit the report by any transaction field that you could not referenced with any of the above parameters.

Transaction Summary Report

The Transaction Summary report enables you to view account and gift or pledge information for a set of transactions that you identify by setting the report parameters. This report includes an extensive list of parameters to enable you to customize the report to fit your needs. You can select transactions by date range, transaction type, pledge status, activity type, project, source, office, giving vehicle, minimum pledge/gift amount, and/or payment method; etc. For example, you can run this report to see summary information for fulfilled pledges for a selected project for your capital campaign.

For each transaction in the report, TA includes donor contact information; account activity information; and transaction details, including gift or pledge date, pledge or paid amount, source code, and payment method. In addition, you can select up to two break groups by which to sort and total the transaction information. For each break group, TA prints totals of: numbers of pledges and pledge amounts; numbers of payments and payment amounts; amounts paid; balances due; average pledge amounts; and number of items.

Upgrade/Downgrade Gifts Report

The Upgrade/Downgrade Gifts report enables you to view transactions that resulted in an upgrade or downgrade for the donor; that is, a change in the donor's current activity. To select the transactions that appear in the report, you can specify a date range to restrict the report to transactions with a gift date or processed date within that range. You can also restrict the report based on activity type, current or prior activity, transaction type, or minimum gift amount. You can order the transactions by Account ID or account alpha name. For example, you can run the report to view the transactions made within the last month that upgraded donors to or downgraded donors from your annual giving major donor activity. For each transaction included in the report, TA includes contact information for the account; the account's current and prior activity; and transaction details, including pledge/gift date, pledge/payment amount, and benefits awarded for the transaction. In addition, TA prints the following totals for the report: total number of pledges and total pledge amount; total number of gifts and total gift amount; total number of pieces; and the sum of the total pledge amount and total payment amount.

Interaction by Technique Report

The Interaction by Technique report enables you to print the total number of interactions for an interaction category with the totals broken out by technique (e.g., call from account) within each interaction type for that interaction category. You can report on one or more interaction categories. You can report on one or more techniques. For example, you can use this report to print the number of interactions for each interaction type in the interaction category that represents your organization's "donor services" interaction, sorted by each technique. Or, you can use this report to print the number of such interactions including only interactions that were calls from the account. In addition, the report includes break groups allowing you to sort the interactions by department, staff, and/or solicitor.

Interaction Comparison Report

The Interaction Comparison report enables you to compare interactions for two fiscal years for a particular fiscal month to see the types of interactions your organization handles with the increases or decreases in the numbers and percentages of those interactions between the two fiscal years; and the techniques used for those interactions with the increases or decreases in the numbers and percentages of those interactions between the two fiscal years.

The report prints the totals and percentages of interactions broken out by interaction type within an interaction category. You can report on one or more interaction categories. The report also prints, in a separate section at the end of the report, the totals and percentages for each technique. For example, you can use this report to compare the number of member/donor service interactions your organization handled in April, 1998 with the number handled in April, 1999 as well as the total handled to-date compared for 1998 and 1999.

Interaction Statistics Report

The Interaction Statistics report enables you to print the number of interactions during a specified time period with totals of these interactions for up to eight characteristics of an interaction. For example, you can use this report to print the total number of interactions for the previous month, sorted and totaled by interaction type and staff member or solicitor.

Interaction Summary Report

The Interaction Summary report enables you to print information for interactions that fit a certain set of criteria with the interactions sorted and totaled by up to two interaction characteristics that you identify. These characteristics include interaction category, interaction type, staff, source, interaction date, and solicitor. For example, you can select interactions within a specific date range and sort and total the interactions by interaction type; and within interaction type, sort and total the interactions by staff member or solicitor. For each interaction selected for the report, TA includes contact information, interaction detail and response information, and gift information for the particular activity type(s) that you specify for the report.

Interaction Value Report

The Interaction Value report enables you to print value totals of interactions that occurred during a specified time period for up to eight characteristics of an interaction. For example, you can use this report to print the cash value totals of services your organization gave to clients through interactions during the previous month, sorted and totaled by interaction type and staff member or solicitor.

Open Tickler Listing Report

The Open Tickler Listing report enables you to print a list of open ticklers for a specified date range (either Start Date or Due Dates). The date range can end in the future so that you can see upcoming ticklers. Also, you can use this report to print out ticklers for other staff members or for those in a department.

Sorting options include: Contact Date (interaction date), Interaction Category, Account Last Name, Tickler Start Date.

For each open tickler, the report prints the staff member responsible, the account ID and action associated with the tickler and the dates (start, due, and interaction dates) along with contact information and interaction details from the interaction associated with the tickler, response and interaction category and type, source code, and project(s).

Program Interaction Report

The Program Interaction report enables you to print the total number of interactions for the top seven programs (i.e., the seven programs with the most interactions) for a specified date range. These totals are sorted by the interaction type. For each interaction type, the report prints the total for each of the seven programs. In addition, the report prints the total number of interactions, the total number of programs, and the total number of responses to those interactions. You have the option of including comments for each program on this report.

Service Provider Listing

The Service Provider Listing report enables you to print a list of the accounts identified by your organization as service providers. You can report according to Affiliation, and Response Category and Type. The Additional Where Clause parameter permits you to reference the Accounts, Addresses and Interaction tables. You can sort and total service providers in up to 4 levels (there are 4 Break Group parameters).

For each service provider, TA prints the Account ID, name line, contact person, eligibility requirements, attributes, and notes. In addition, you can choose to have TA include the list of services provided by each provider. You can use this report to print information about one or multiple service providers.

Unlike other reports, this report uses 14-point type.

Requested Gifts Summary Report

The Requested Gifts Summary report enables you to view information about your organization's account project records. This report includes contact information, stage, totals for ask amount, expected amount, and pledge and payment amount. The report also includes project purpose and associated source code information for the donor associated with a project. You can order this report by project or by solicitor and can sort by Account ID or Alpha Name. Use this report to manage the movement of prospects for a specific project or by a specific solicitor within each project.

Underwriting Contract Master Report

The Underwriting Contract Master report enables you to view underwriting contract (i.e., pledge) information for one program or all of your programs. The report includes the underwriter, program, staff, and contract details for each contract included in the report. Contract details include the contract amount (pledge amount), balance due, start and end date, and staff responsible for the contract. You can use this report to view the balance of payments due on all your underwriting contracts for a selected program along with the brief name of the staff member responsible for the contract.

Underwriting Contract Summary Report

The Underwriting Contract Summary report enables you to view summary information about your underwriting contracts (i.e., pledges) for a specified date range. TA calculates the summary information based on payment method, payment method and affiliation (i.e., station support), program source or staff member responsible for the contract. The summary information includes the total amount committed for contracts during the specified date range, the total amount due for the contracts, and the total contract amount. For example, you can use this report to view total payments made toward each program and the balance still due for each program, grouping the information by the staff member responsible for the contracts.

SPC Acquisition Report

The SPC Acquisition report enables you to view underwriting contract (i.e., pledge) information for a specified period of time. For each underwriting contract included in the report, TA prints the program, underwriter and Account ID, pledge details, the program source, contract amount, balance due on the contract and the committed amount (i.e., the amount of recognized revenue your organization can apply from the contract for the specified period of time). In addition, you can specify that TA calculate the total committed amount, contract amount, and balance due for each program or for each underwriter.

Underwriting Financial Report

The Underwriting Financial report enables you to view information about underwriting pledges to which payments have been made within a specified date range. The report includes the underwriter account name, contract number, underwriting contract date, amount, and monetary details regarding the contract payment status. In addition, the report groups the underwriting contract information by program and prints the total contract amount, amount billed to date, committed amount, amount received, and amount due for each program. Grand totals for all contracts included in the report appear at the end of the report. For example, you can use this report to view detailed monetary information for each program's underwriting contributions received in 1999 and for all programs' underwriting contributions received in 1999.

Planned Giving Analysis Report

The Planned Giving Analysis report enables you to view the total pledge and payment amounts of your organization's planned and outright gifts for two fiscal years: for a fiscal month range you specify and for the fiscal year to date for each fiscal year. You can sort the totals by giving vehicle, planned gift status, payment method, or whether the gift is revocable or irrevocable. While this report includes parameters specific to planned gifts (e.g., giving vehicle), you can run the report to include outright gifts (e.g., stock gifts that are not planned gifts).

Planned Giving Profile Report

The Planned Giving Profile report enables you to view information for one or more planned gifts for one or more accounts. For each planned gift, TA includes the following information, if applicable: contact information for the donor, trustees, beneficiaries, attorney, and executor; bequest details, including intention date and amount, confirmed date, expected date and amount, probate date, and bequest terms; trust/annuity/income fund details, including principal amount, donor cost basis, start date, first payment date, charitable deduction information, remainder information, and payment information for trust or annuity payments made to the donor. In addition, the report includes details for each transaction entered for the planned gift record. You can use this report to get detailed information about an account's planned gifts in order to better solicit them for additional planned gifts or to steward existing gifts.

Planned Giving Summary Report

The Planned Giving Summary report enables you to view summary and detail information for a set of planned gifts that fit the criteria you enter, e.g., expected gift date, planned gift status, probate date, or giving vehicle. For each planned gift included in the summary, TA includes giving vehicle details, including the expected gift date and amount and the actual remainder amount; information about the donor, including the social security number, address, and telephone number; and specific transactions applied to the planned gift, including the gift date, payment amount, payment method, and fund. You can sort the planned gift information by planned gift status, activity type, and fund to see the total number of gifts, their estimated value and total amount paid for the planned gifts.

Matching Company Employees Report

The Matching Company Employees report enables you to print the list of accounts with matching gift relationships for a specific matching company or for all matching companies. In addition, when you run the report, you specify a time period because the report includes matching gift information for any gifts made by these accounts during that time period. For each account with a matching gift relationship to each company included in the report, the report prints the account's Account ID, account name, and relationship to the company. If, during the time period you specified, the account gave a gift accompanied by a matching gift form, the report includes matching gift payment amounts and reconciled matching gift amounts. The report includes column totals for the number of forms sent, the total amount the company is expected to match, the number of payments, the total payment amount, and the total matched amount.

For example, you can use this report to get a list of the relationships between the matching gift company and donors and to see what amount the matching gift company has paid within the last year toward the match amount for each donor. The total amount the company actually matched is based on how your organization reconciled the accounts' gifts with the company's matching gift(s).

Matching Company Gifts Status Report

The Matching Company Gifts Status report enables you to print the list of matching gifts given by one or more matching companies during a time period you specify. The report identifies a gift from a company as a matching gift by selecting only those gifts where the gift type is "MG" for matching gift.

For each matching gift selected, the report lists the donors' gifts reconciled with the matching gift. Following the section listing the company's matching gifts is a section ("Unmatched Pledges") listing each donor's gift made during the time period you specified and accompanied by a matching gift form but not yet reconciled with any of the company's matching gifts. If a donor has made a gift outside of the time period you specified and submitted a matching gift form with that gift, the gift is not included in the report if that gift hasn't been reconciled with a matching gift listed on the report.

For each matching gift, the report includes the company's name, Account ID, brief name, gift date, and amount. For each donor's gift, the report includes the donor's name, Account ID and relationship to the company, gift or pledge amount, expected match amount, the reconciled matching gift amount, comments from the donor's matching gift form and status of the company's match. Following the sections listing the company's matching gifts and the donors' gifts yet to be matched by the company, the report lists the total dollar amounts and the total number of gifts for eligible and ineligible gifts and for matched and unfulfilled matching gifts.

Matching Gift Reconciliation Listing

The Matching Gifts Reconciliation Listing report enables you to print the matching gift reconciliation information for a specific matching company or for all matching companies during a time period you specify. For each company included in the report, the report prints the company's matching gifts that were received during the time period you specify and with which donors' gifts have been reconciled. If your organization received a matching gift from a company during the time period specified but your organization has not reconciled any donors' gifts with that matching gift, the matching gift is not included in this report.

For each of the company's matching gifts included in the report, the report lists the donors' gifts reconciled with the company's matching gift. This report does not contain any information about those donors' gifts that haven't been reconciled with a company's matching gift or that are ineligible for matching.

For each of the company's matching gifts, the report contains the company's account name, Account ID and brief name as well as payment information. For each donor with one or more gifts reconciled with one of the company's matching gift included in the report, the report contains the donor's account name, Account ID, and relationship to the matching company as well as reconciled gifts that were matched by the company and the company's expected matching gift amount.

You can run this report if you want to see all of the donors who are related to a particular matching gift company and the donors' gifts that are eligible to be matched, the amount of the gift, and the amount that the matching company has paid toward the matching gift.

Committee Listing

Run this report to review the committees that are set up for your organization. The information displayed is determined by what your organization has entered on the Committee Entry screen. Information such as Positions, Meetings, Subcommittees, and Event (if applicable) is displayed. You can run this report for one or multiple committees. Use the Committee parameter to specify the committee code(s) or use the Committee Type parameter if you want to review all committees that have been set up with a specific committee type code.

Event Budget Items Report

The Event Budget Items report enables you to view actual and estimated cost and revenue for one or more events you select by specifying the event code and/or the budget type. TA prints the budget date, budget type, description, budget category, office, and estimated and actual cost and revenue amounts. TA also prints report totals for the monetary amounts.

Event Group Listing Report

You can run the Event Group Listing report to view a list of your organization's event groups (e.g., lecture series, reunion weekend). For each event group, TA prints the event group code, its description, and status.

Event Profile Report

The Event Profile report enables you to view details for events you specify by setting the event code range, event type, and/or event group. You can include or exclude the following event information by setting the report parameters: event details, event attributes, expenses, reservations, registrants, registrant attributes, event summary, key accounts, benefits, meals, planning, and volunteers. For example, you can use this report to provide an overview of all the events within a specific event group (e.g., a series of events for a specific weekend).

Event Roster Report

The Event Roster report lists information about the registrants for an event and provides an easy way to report on information specific to each registrant of an event as defined using event attributes (e.g., golf handicap, cart needed). This report includes the balance due and seating preference for each registrant as well as registrant attributes, if desired.

Event Summary Report

The Event Summary report enables you to view attendance and ticket sales information for events included in the report. You can select events by event type, event group and/or an event code range. For each event included in the report, TA prints the event name, description, start date and time, end date and time, target attendance, number of tickets purchased and amount paid. TA also prints report totals for the attendance and ticket sales information. You can use this report to view the progress of ticket sales for a particular event or to compare ticket sales for selected events.

Event Host and Guest Report

The Event Host and Guest report enables you to view a list of event sponsors and their associated registrants. For each host listed, TA prints the host name, guest name, participation, benefit, and whether the guest attended the event. TA also prints the total number of associated registrants for each host.

Participant Pledge Report

The Participant Pledge Report enables you to review pledge amount, paid amount and amount due of participants and sponsors for one or multiple events. You can choose to display soft credit transactions that were entered in the Soft Credit window of the Batch Detail Entry screen (these are considered 'linked' or attached soft credits since they maintain the relationship between the gift giver and the account receiving the soft credit). You can also choose the level of detail that is displayed about the participant or sponsor. For example, you can choose to display the Name only, Name and Telephone, or Name, Address, Telephone, and Email. TA automatically displays the Account ID, Gift Date, and Pledge Number in this report.

Registration & Participation Report

The Registration & Participation report enables you to view registrants and whether they have completed registration and attended the selected event(s). You can view registered guests only or all guests. For each guest included in the report, TA prints the participation, donor name, whether the guest is registered or not and whether the guest attended the selected event(s) or not.

Registration Edit Report

This report displays all the registration information for a registrant and attributes and transactions associated with that registrant. The report has the following filter parameters: Event, Batch Number, User Inserting, Registration Date Range, and Date Inserted Range. There is one break group with the following options: Source/Event, Source, Technique, Alpha Name, Stage. There is an 'Additional Where Clause' parameter that permits you to reference the Event Registrant or the Registrant Transactions tables. The Sort Option parameter includes these choices: Event, Alpha Name, Date Inserted, and Registration Date. This report is available in the Events and Volunteers module and can be run as an Output with queries that are built with a Registrations query type.

Registration Fees Due Report

The Registration Fees Due report enables you to view amounts paid and balance due for one or more selected events. For each event included in the report, TA prints the donor names, their associated guests' names, benefit, benefit count, paid amount and balance due. TA also prints report totals for the selected event(s).

Team Analysis Report

The Team Analysis report enables you to view information about the teams registered for one or more events. You can select the teams based on the event name, team name, stage, and registration date. TA displays the teams within the events for which they are registered, and includes financial information for each team. You can also select whether to include details about the teams and team members. You can choose from several methods to sort the teams and their members. For example, you can run this report to view financial and contact information for all of the teams with members who registered within the last month for your annual Walkathon event.

Team List Report

The Team List report enables you to view teams that have registered for a particular event or events. You can select teams by event name, specific teams or groups of teams, or restrict the report to a specific registration (gift) date range. Each registered team is listed once along with its description (team name) and the name of the team Captain.

Account Statistics Report

The Account Statistics report enables you to view counts of accounts that match criteria that you select. This report can be used to identify and learn about sets of donors who share common characteristics, such as giving activities or geographical area. For example, if you want to know the number of accounts at each giving level within an activity as well as the total number of accounts donating to that activity, you can run the Account Statistics report with "Activity" in Break Group 1 and "Giving Level" in Break Group 2. If you want to know the distribution of account activity statuses among these groups, you can use "Status (Account Activity)" as the column category and specify which statuses you are interested in viewing.

Affiliate Revenue by GL Category Report

The Affiliate Revenue by GL Category report enables you to view shared and unshared revenue for either your national office or your affiliate offices, by state. You can run this report for gifts received with a specific date range. You can also set a specific number as the cost factor or choose a percentage, which represents the percentage that the national office takes off the top from each affiliate. You can also choose whether the cost factor is applied to Shared Revenue, Unshared, or All. For each office, TA prints the shared amount, the unshared amount, and the total amount received.

Affiliate Shared Revenue Report

The Affiliate Shared Revenue report enables you to view revenue shared between your national office and each of your affiliate offices for a particular activity type. You can run this report for gifts received within a specific date range, and you can choose to view information broken out by either gift type or credit account. You can also set a cost

factor, which represents the percentage that the national office takes off the top from each affiliate. For each office, TA prints the total gift count, total gift amount, average gift amount, and net amount received. In addition, TA prints the percentage and amount of the shared revenue that goes to the affiliate office, and the amount that goes to the national office.

Direct Marketing Response Report

The Direct Marketing Response report enables you to view solicitation, pledge, cost, and fulfillment information for telemarketing or mail marketing codes. You can choose whether to run the report for telemarketing or mail marketing codes. When you choose to run the report for telemarketing responses, you can run the report in terms of calls or contacts made. You define what marketing codes to include in the report by setting parameters for activity, campaign, initiative, effort, and an additional where clause.

Note that this report will not be included in future releases of TA. The [Response Report](#) replaces this report.

Income Comparison Report

The Income Comparison report enables you to compare the income received during the same time period of two different fiscal years. For example, you can compare income in the third month of the current fiscal year with income in the third month of last fiscal year. Or you can compare income in the second quarter of two different fiscal years. The report can compare income in activities, classification, payment method, and many other categories.

Marketing Response Summary Report

The Marketing Response Summary report enables you to look at donor response to solicitations based on break groups that you set. You can specify a single source code or a group of source codes to indicate transactions to be used in the report.

Note that this report will not be included in future releases of TA. The [Response Report](#) replaces this report.

Monthly Income Analysis Report

The Monthly Income Analysis report enables you to look at the income received in a specific fiscal month and for the fiscal year to date. The report displays the number of gifts, amount of gifts, and average gift amount. Soft credits and zero-dollar transactions are not included; adjustments are included.

Pledge and Paid Statistics Report

The Pledge and Paid Statistics report enables you to look at the pledge and payment amounts for transactions you select based on their gift date and/or soft credit type. You can decide how the information is displayed in the report by defining break groups and columns. For example, you can run this report to look at the cumulative amounts of pledges and payments made by your organization's board members (including soft credits), with columns broken out by Payment Method into Cash and In-kind gifts. This report has the same flexibility as the Revenue Statistics report, but this report displays both pledge and payment amounts for each characteristic.

Renewal Statistics Report

The Renewal Statistics report enables you to view information about the response to renewal efforts for a campaign, broken down by both renewal status (i.e., first year renewals vs. multi-year renewals) and expiration month. Solicitation interactions must exist (i.e., each account that was sent the renewal solicitation must have an interaction representing that solicitation) in order for there to be data for this report.

Renewal Summary Report

The Renewal Summary report enables you to view information about the response to renewal efforts for a particular campaign and expiration month broken down by the giving level of either the donor's last or largest gift. Solicitation interactions must exist (i.e., each account that was sent the renewal solicitation must have an interaction representing that solicitation) in order for there to be data for this report.

Response Report

This report enables you to extract any information from the Source table when your organization uses Source Analysis Rules. You can view number of solicitations, responses, total revenue, and % response, average gift, total cost, and revenue by month, and cost by month. You can choose whether to run the report for telemarketing, mail marketing codes, for a particular source analysis rule. The report includes three break groups where you can select any value from the sources table.

You define what marketing codes to include in the report by setting parameters for activity, campaign, initiative, effort, and an additional where clause. Also, you can generate this report in a delimited format so that you can load the report information easily into a spreadsheet.

The Response Report eventually will replace these reports: Direct Marketing Response, Marketing Response Summary, and Solicitation Response. If you use any of the discontinued reports, you can [make copies](#) of the Response Report for each way that you regularly want to run the report.

Retention Rate Report

This report calculates the retention rate of a group of donors. The report has parameters where you identify an initial population of donors. You can display renewal or retention information. It has three break groups where you can sort and total by Benefit Expiration Date (or months until the expiration date), Benefit, Benefit Package, Effort, Gender, Gift Type, Giving Level, List, Program, ZIP Code, or Charter Member Year (a USGA-specific calculated field).

The report looks at pledge payments and gifts, excluding soft credits. An Additional Where Clause parameter is available so that you can further narrow down the original group of transactions.

You can define the data to display in up to six columns: (Original Count; Original \$; Retained (or Renewed) Count; Retained (or Renewed) \$; Retain (or Renew) Rate; %\$\$\$Retained (or %\$\$\$Renewed). Note: The User Columns list choices in terms of Renewal information. However, if you do not set the Membership Benefit parameter, the report pulls Retained information.

Renewal and retained date ranges do not start at the beginning and end of the renewal/retained month range parameters. For example, if a donor's gift is on 3/20/03 and the renewal month begin and end were set to 9 and 13 (respectively), the date range that a gift would be considered a renewal or retained gift would be 12/20/03 through 4/20/04 --not 12/01/03 - 04/30/04.

Revenue Statistics by Marketing Code Report

The Revenue Statistics by Marketing Code report enables you to view numbers and amounts of payments or pledges for a specific fiscal period, grouped by marketing code. You can choose for the report to display information at any marketing code level, and you can choose to run the report for payments or for pledges.

Revenue Statistics Report

The Revenue Statistics report compiles information based on the marketing information on transactions and permits you to review transactions to show a total number/amount over a specific time period. You can run this report to compare revenue between different fiscal periods. The Revenue Statistics report provides counts and amounts of gifts. You can decide how the information is displayed by defining break groups and columns.

Solicitation Response Report

The Solicitation Response report enables you to view information about solicitations that match the criteria you select by specifying one or more marketing codes and/or a range of account expiration dates that identify which solicitation interactions to pull. This report displays solicitation, response, cost, and revenue information. You can also choose whether to display the number of accounts expiring when the solicitation was mailed or the mail date. For example, you can run this report to view the solicitation, response, cost, and revenue information for a particular campaign grouped by activity expiration month and year of the accounts being solicited. To do so, use Expiration Year (Interactions) in Break Group 1, Expiration Month (Interactions) in Break Group 2, and specify a range for the accounts' expiration date.

Note that this report will not be included in future releases of TA. The [Response Report](#) replaces this report.

Benefit Inventory Listing Report

The Benefit Inventory Listing report enables you to view inventory information for benefits you select by specifying the benefit category, and/or whether or not the benefits are active. For each benefit item included in the report, TA prints cost information such as the minimum assignment amount, unit cost, and shipping and handling cost. TA also prints inventory information such as the inventory and alternative inventory balances, backorder quantity and due date, and reorder level. You can sort the information by benefit code, minimum assignment amount, premium category, or unit cost. For example, you could run this report to view inventory information for your active premiums, sorted by unit cost.

Benefit Listing Report

The Benefit Listing report enables you to view information about the benefits you select by specifying the benefit category and/or the marketing codes to which the benefit was awarded, as well as whether the benefit is active and/or auto-awarded. For example, you could run this report to look at all of your organization's premiums that were awarded to the Annual Giving activity type. For each benefit included in the report, TA prints information such as the requirements for awarding (e.g., minimum and maximum award amounts), award options (e.g., award automatically), interests and classifications associated with the benefit, offer start and end dates, and cost information.

Extended Premium Listing Report

The Extended Premium Listing report enables you to view the premiums tied to the marketing codes you specify by setting the report parameters. For example, you could run this report to look at the premiums offered as part of your organization's March 2000 Acquisition campaign for the Annual, Mid-level activity. TA prints the following information for each premium: Benefit code and description, minimum gift amount, premium category, and comments associated with the benefit.

Note: This report is similar to the Premium Listing report, except the Extended Premium Listing report includes comments associated with the premiums.

Benefits and Programs by Pledge Break Report

The Benefits and Programs by Pledge Break report enables you to view benefits and other pledge break information for pledge breaks you select by specifying the date range and/or marketing codes associated with the pledge breaks. For example, you could run this report to view, by date and time, all of the benefits associated with the March 2000 pledge drive.

TA orders the pledge breaks by day. Within each pledge break, TA prints program information, break information, source code, estimated number and dollar amounts of pledges to receive during the break, and the list of benefits offered during the break. For each benefit, TA prints the benefit code, description, and minimum award amount. TA prints totals at the end of each program and the end of each day.

Premium Count by Group Report

The Premium Count by Group report enables you to view the number of "premium groups" that have been requested by your donors. A premium group is a combination of one or more premiums that were requested together by a donor. For example, TA lists the number of donors that have requested "P1030" and "P1031" together on one line, and the number of donors that have requested "P1030," "P1031," and "PTOTE" together on another line. For each premium group, TA prints the list of premiums that make up the group and the number of groups requested. You run this report with a set of queried records. For example, you can run this report with the "TA PREMIUM" query, which selects premiums that are ready to be delivered.

Premium Listing Report

The Premium Listing report enables you to view the premiums tied to the marketing codes you specify by setting the report parameters. For example, you could run this report to look at the premiums offered as part of your organization's March 2000 Acquisition campaign for the Annual, Mid-level activity. TA prints the following information for each premium: Benefit code and description, minimum gift amount, and premium category.

Note: This report is similar to the Extended Premium Listing report, except that report includes comments associated with the premiums.

Premium Detail by Marketing Code Report

The Premium Detail by Marketing Code report enables you to view premiums requested during the dates and for the marketing codes that you specify by setting the report parameters, sorted by either benefit code, minimum assignment amount, or premium category. For example, you can run this report to view all of the premiums that were requested but not yet delivered for your Events activity, and you can view these premiums at the initiative level.

For each marketing code, TA displays the premiums selected. For each premium, TA prints information such as the premium category, vendor, gift amount, and the costs per premium unit. TA also prints the number of units requested, eligible, delivered, in inventory, on order, needed, and the units requested multiplied by the total cost per premium. At the end of each marketing code, TA totals the amounts and number of units for the marketing code. At the end of the report, TA prints totals for all of the premiums included in the report.

Premium Summary by Marketing Code Report

The Premium Summary by Marketing Code report enables you to view information about the premiums awarded to different marketing codes. You identify the premiums and marketing codes to include in the report by specifying a date range, marketing codes, and/or the premium code. For example, you can run this report to view all of the premiums awarded to the Annual On-air activity in March 2000.

TA groups the premiums by the marketing codes to which they were awarded. For each marketing code, TA prints information such as the percent of accounts that have made transactions who have also been awarded a premium benefit for the marketing code (i.e., the takeage), the number of premium benefits taken, the average premium cost, the cost of premiums taken, the number of pledges awarded only one premium, and the number of pledges awarded multiple premiums.

Premiums by Program Report

The Premiums by Program report enables you to view premiums associated with pledge breaks that you identify by specifying the marketing codes to which the pledge break is assigned. TA groups the premiums in the report by the program aired. For example, you can view all of the premiums associated with different programs that were aired as part of your March 2000 On-air pledge drive. For each program, TA displays the premiums associated with that program. For each premium, TA displays the minimum gift amount, benefit code and description, and premium category.

Note: The Premiums by Program and Break report is similar to this report. However, that report includes information about the pledge breaks to which the premiums are tied.

Premiums by Program and Break Report

The Premiums by Program and Break report enables you to view premiums associated with pledge breaks that you identify by specifying the marketing codes to which the pledge break is assigned. TA groups the premiums in the report by the program aired. Within each program, TA groups premiums by pledge break. For example, you can view all of the premiums associated with different programs that were aired as part of your March 2000 On-air pledge drive. For each pledge break, TA prints the source code, break start time, planned number of break minutes, and information for the premiums associated with the program.

Note: The Premiums by Program report is similar to this report, except that report does not include any information about the pledge breaks.

Premiums Delivered/Requested Detail Report

The Premiums Delivered/Requested Detail report enables you to view information about premiums awarded through different marketing codes. You can select the premiums by specifying marketing codes, whether the premiums were delivered, and/or the dates the premiums were last sent. For example, you can run this report to view all of the premiums requested in the last week as part of your March 2000 On-air pledge drive.

TA groups the premiums by marketing code, and prints the following information for each premium: Premium category, gift amount, number of units, total cost for the number of units, and cost per unit. At the end of each marketing code, TA prints the total number of premium units, and the total cost of those units. At the end of the report, TA prints the total number of premium units for the report and the total cost of the premiums in the report.

Premiums Ordered Report

The Premiums Ordered report enables you to view the premiums awarded within the date range and/or marketing codes that you specify by setting the report parameters. For each premium, TA prints the benefit code, benefit description, and number requested.

Premiums Requested for Pledge Report

The Premiums Requested for Pledge report enables you to view information for the premiums awarded within the date range and/or marketing codes that you specify by setting the report parameters. For example, you can run this report to view information about the premiums requested (such as how many of a particular premium were charged vs. pledged) during your organization's March 2000 pledge drive. For each premium, TA displays the number requested, awarded on a charge card, awarded to pledges that need to be billed, delivered, on backorder, in inventory, in stock minus those backordered, and on order.

Account Reports Document

This document describes the reports related to printing account information or providing statistical information about accounts based on account information. One report, the Account File Statistics report, prints counts of active and inactive accounts based on characteristics you select. You can use the Account File Statistics report to find out the number of active and inactive accounts you have within each of your fundraising activities.

Gifts and Pledges Reports Document

This document describes the reports related to gift and pledge information. Some reports provide information based on the batches of gifts and pledges entered and processed. Other reports provide gift information as it relates to donor characteristics such as giving level (upgrade or downgrade) by fundraising activity. You can also use selected reports to see gift information as it relates to marketing activities such as how much money has been raised toward project goals or by a particular solicitor.

Interaction Reports Document

This document describes the reports related to interaction information or providing statistical information about interactions. For example, the Open Tickler Listing prints all open ticklers for a date range you specify. Other reports print information on the type of interactions your organization has handled. These reports can provide a picture of how your community perceives services and operations of your organization.

Corporate Gift, Major Gift, and Grants Reports Document

This document describes the reports related to your organization's cultivation of major gifts whether the donor is an individual, corporation, or foundation. You can run the Requested Gifts Summary Report to view the donors solicited by project or by solicitor. Other reports provide information concerning underwriting gifts.

Planned Giving Reports Document

This document describes the reports related to planned gift records. You can use these reports to print the detailed or summary planned gift information for one or more specific accounts.

Matching Gifts Reports Document

This document describes the reports related to matching gifts. For example, the Matching Company Employees report prints, for the companies you select, the employees and each matching gift you processed from the employee for the date range you specified. The Matching Company Gifts Status report prints for one or more companies, each company's gift sent to match its employees' gifts along with each employee gift reconciled to the company's gift.

Events and Volunteers Reports Document

This document describes the reports related to the events and volunteers module.

Management Reports Document

TA includes more than a dozen management reports that allow your organization to track the results of fundraising efforts in order to strategize better for future efforts. Management report parameters are more complex than those in other TA reports, allowing you to view and analyze information in many different ways. In fact, by entering different combinations of parameters, you can generate hundreds of different permutations of one report. Most management reports include break group, column, and additional where clause parameters; these are described following the standard parameter sections.

Benefits Reports Document

This document describes the reports related to your organization's benefits. Most of these reports provide information for benefits awarded within a specific timeframe and/or to a specific marketing code. Some pertain specifically to premium benefits. For example, you could run the Benefit Listing report to view the award requirements and options (e.g., award automatically), associated interests and classifications, and cost information for a set of benefits awarded to a particular activity type. Or you could run the Premium Detail by Marketing Code report to view information for each premium awarded to a particular activity, such as the vendor, gift amount, number of units requested, and number in inventory.

