

Reports Guide

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Key Performance Indicators

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Key Performance Indicators track your organization's strategic performance. Financial and non-financial matrices are used to assess your business condition and to help you determine a course of action. Monitoring your business activity using KPIs helps you place a value on otherwise difficult to measure activities, such as leadership development.

Depending on the nature of your organization and your strategy, KPIs can help measure the progress toward your goals. For example, your organization may decide to track the total number of gifts generated each month as a performance indicator. Or, if your organization uses direct marketing, you may decide to track the cost per dollar raised for a specific mailing. With KPIs, you can create an instance that defines this indicator. After you create the instance, your organization can view the status of your KPI goals and schedule updates for KPI instances.

KPI Workflow

You can manage key performance indicators (KPIs) to allow quick access to track goals and progress. The KPI feature also provides a variety of ways to access the information, such as dashboards, links on records, and RSS feed links you can copy to Internet browsers.

Types of KPIs

All KPI instances are based on a definition stored in the program catalog. The program includes a number of definitions, but the exact functionality of the KPI depends on the type of information contained in each definition.

Note: Authoring KPI definitions is available as a customization. If you need definitions beyond those included in the program, contact your in-house developer or your implementation consultant.

Standard KPIs

A standard KPI generates the requested value. Users can then view the data on the KPIs page or with an RSS feed or web page link provided them by the administrator.

Context-Sensitive KPIs

A context-sensitive KPI is assigned to a specific record. In these cases, the KPI is then available within the context of that record.

Dynamic Goal KPIs

A dynamic goal KPI defines the KPI instance goal outside of the KPI instance. This is useful for records that include goal information and for users who want the KPI instance goal to always reflect the record value.

Access KPIs

To access KPIs, from *Analysis*, click **Information library**, and click the KPIs tab. From this page, you can create, edit, and delete KPI instances, update an existing KPI value, open an instance, and assign permissions.

KPI Definitions

The program contains several standard KPIs, such as for marketing efforts and fundraising goals.

Marketing KPIs

The program contains several standard KPIs for appeal mailings.

Note: Marketing KPIs include values from indirect responses in their calculations.

Average Gift Amount for Mailing

For the Average Gift Amount KPI, the program divides the total revenue by the total number of responses to calculate the average gift amount for each mailing.

Cost Per Dollar Raised for Mailing

The Cost Per Dollar Raised for Mailing KPI involves precalculations. For the precalculations, the total costs equal the sum of the fixed costs and the total package costs. To calculate this KPI, the program divides the total cost of the mailing (as determined by the precalculations) by the total revenue received as a result of the mailing.

Number of Responses for Mailing

For the Number of Responses KPI, the program displays the total number of distinct gifts received as a result of the mailing.

Response Rate for Mailing

For the Response Rate KPI, the program divides the total number of responses for a mailing by the total number of offers, and multiplies the result by 100.

Return on Investment (ROI) Amount for Mailing

The Return on Investment (ROI) Amount for Mailing KPI involves precalculations. For the precalculations, the total costs equal the sum of the fixed costs and the total package costs. To calculate the Return on Investment Amount KPI, the program subtracts the total cost of the mailing from the total revenue received as a result of the mailing.

Return on Investment (ROI) Percent for Mailing

The Return on Investment (ROI) Percent for Mailing/Segment KPI involves precalculations. For the precalculations, the total costs equal the sum of the fixed costs and the total package costs. To calculate the ROI Percent KPI, the program subtracts the total cost from the total revenue, divides the result by the total cost, and then multiplies the result by 100.

Total Revenue for Mailing

For the Total Revenue KPI, the program displays the total amount of all gifts received as a result of the mailing.

Cost Per Renewal for Membership Mailing

For the Cost Per Renewal KPI, the total cost of a membership mailing is divided by the number of renewals that occurred as a result of the mailing.

Manage KPIs

You can manage KPIs from the KPI Instances page and from the records of KPI instances.

Add KPI Instances

A KPI instance defines what you want the performance indicator to accomplish.

For example, your event coordinator wants to track registrants for an upcoming event, comparing the number of registrants to the event's capacity. You can create a KPI instance using the "Event Registrant Capacity" KPI definition. After you create and generate a value for the KPI, a link appears in the event record. Depending on permission settings, a user can then access a dashboard displaying the status of the event's registration vs. the event's capacity. The user can also manage the KPI from this page, updating the values, editing the KPI settings, or adding additional KPIs.

> Add a new KPI instance

1. From *Analysis*, click **Information library**. The information library appears.
2. Click the KPIs tab.
3. On the action bar, click **Add**. The Select a KPI screen appears.
4. Select the KPI definition on which to base your new instance.
5. Click **OK**. The KPI instance screen appears.
6. On the General tab, enter a **Name** and **Description** for the KPI to help identify it.
7. On the Criteria tab, select the specific information to represent in the KPI instance. The exact fields and options included on the tab depend on the selected KPI definition.

For information about the definition for a KPI, refer to [KPI Definitions on page 6](#).

For example, if you select the Revenue Growth definition to compare the growth in revenue from one time period to another, the Criteria tab displays the designation and campaign filters to limit the revenue transactions included in the comparison. Under **Comparison**, you can select which time periods to compare.

Note: A "selection" is a named set of IDs of the same record type. It has a name and description and is often used as input into a process or report to specify which set of records should be acted on by that process. Because selections consist only of IDs, they are optimized for peak processing speed. For information about selections, refer to the *Query and Export Guide*.

Note: You must complete all required fields on the Criteria tab before you can proceed to the next tab.

8. Select the Preview tab.

9. In the **As of** field, select the date as of when to view the results of the value that satisfies the set parameters of the KPI and click **Preview**. The value that satisfies the set criteria as of the selected date appears.

For example, you set the Criteria tab to compare the revenue growth year to date from the previous year to date. In the **As of** field, select the current date to compare the revenue growth year to date.

10. Select the Goal tab.
11. In the **Overall goal** field, enter this KPI instance goal. For a dynamic goal KPI definition, the **Overall goal** defaults to the goal associated with the record selected on the Criteria tab.

Note: For information about dynamic goals, refer to [Dynamic Goal KPIs on page 5](#).

12. In the **Good target** and **Satisfactory target** fields, enter the amounts or select the percentages to represent in red and in yellow as warnings for under performance.

For this scenario, the manager requested that values running at less than 35% of goal display red, so enter 35% in **% of overall goal** for the **Good target**; he requested that values running at less than 73% of goal display in yellow, so enter 73% in **% of overall goal** for the **Satisfactory target**; any values running above 73% display in green.

13. Under **Milestones**, click **Add** to create milestones to track progress.
 - a. In the **Milestone date** field, enter the date of the milestone, such as the first quarter end date.
 - b. In the **Milestone goal** field, enter the amount to reach by the milestone date.
 - c. In the **Good target** and **Satisfactory target** fields, enter the amounts to represent in red and in yellow, as warnings for under performance.
For this scenario, the manager did not specify, so accept the system defaults.
 - d. Click **OK**. In the grid, the new milestone appears.
 - e. Repeat steps a-d for each additional quarter.

14. Select the History tab.

15. Select whether to archive all history records generated with each instance update or only a select number of recent records. These values are used to create the trend graph for the KPI instance.

16. Click **Save**. You return to the KPI instances page. In the grid, a gray icon appears to the left of the new instance to indicate that a value for the instance has not yet been generated. For information about how to generate values, refer to [Generate Values for a KPI Instance on page 10](#).

17. After you generate the KPI value, if the KPI definition used to create the KPI is context-sensitive, KPI links appear on the related record type.

View KPI Data

After you add a KPI instance, depending on the type of KPI created, you can access its information a number of ways.

From a Record

If you select a context-sensitive KPI definition when you create the KPI, links appear on the related record type.

Note: For information about how to add KPIs to your system, refer to [Add KPI Instances on page 7](#).

From the Web

With the RSS feed included on the KPI instances page, users can easily access up-to-date information they need without opening the program. Simply send your users the RSS feed link, which they can copy into their Internet browser and add to the **Feeds** list. For more information, refer to [Manage RSS Feed on page 15](#).

From Vista or 7 Viewer Gadgets

Windows Vista and *Windows 7* users can access a “Gadgets” CAB file which includes a number of KPI viewer gadgets. You can add these gadgets, which display selected KPI information, to your desktop.

From Yahoo! Widgets

Windows XP users who cannot use the *Windows Vista* gadgets can use Yahoo! widget compatibility to add a free-floating KPI widget to their desktops. The widget displays information about the selected KPI instances and is updated regularly. For more information, refer to [Create Yahoo! Widgets for a KPI Instance on page 15](#).

> Manage KPIs from a record

1. Open the record associated with the KPI instance.

Note: Exactly what appears on a record depends on the permission settings for the KPI. For more information, refer to [Assign KPI Permissions on page 10](#).

2. Under **More information**, click **Manage KPIs**. The KPI instances page for the selected record appears.
3. Manage the KPI instance as necessary.
 - Add a new KPI instance. The KPI definitions available are limited to only those assigned to the corresponding record type. For more information, refer to [Add a new KPI instance on page 7](#).
 - Generate KPI values for a selected instance. For more information, refer to [Generate values for a selected KPI instance on page 10](#)
 - Assign task permissions. For more information, refer to [Assign KPI Permissions on page 10](#).

Assign KPI Permissions

You can control system role permissions granted to each individual KPI instance. When a user assigned the specific role opens the program, only KPIs for which they are granted permission appear.

Note: For more information about system roles and security, refer to the *Security Guide*.

> Set user permissions for KPI instances

1. From *Analysis*, click **Information library**. The information library appears.
2. Click the KPIs tab.
3. In the grid, select the KPI instance for which to assign permissions.
4. On the action bar, click **Assign Permissions**. The Assign KPI Instance Permissions screen appears.
5. Under **System Roles**, select the checkboxes for the roles to access the KPI.

Note: To deny a role access, do not select its checkbox. To clear all existing assignments, click **Clear all**.

6. Click **Save**. You return to the KPI Instances page.

Generate Values for a KPI Instance

After you create a KPI instance, you can generate the values associated with its settings whenever necessary. When you generate values, the selected KPI record opens and displays details about the indicator values. For information about KPI instance records, refer to [KPI Instance Record on page 12](#).

Note: To generate KPI values, you can also create an *SQL Server* agent job or *Windows* scripting file. For more information, refer to or [Create a Windows Scripting File to Generate KPI Values on page 15](#).

> Generate values for a selected KPI instance

For information about how to create a KPI instance, refer to [Add KPI Instances on page 7](#).

1. From *Analysis*, click **Information library**. The information library appears.
2. Click the KPIs tab.
3. In the grid, select the instance for which to generate values.
4. On the action bar, click **Update KPI value**. The Update KPI screen appears.
5. Select whether to view data based on the current date or another date.
 - If you select **Process once using current date**, the program creates one history record relative to the current date.

Note: We recommend you back date values for new KPI instances, when trend information does not exist. After you create a KPI instance, you can schedule a business process to update its values.

Each time the process runs, the program creates a new KPI instance history record for the values of the date the process runs.

- If you select **Back-date**, the program creates several history records for the time period determined by the selected interval such as “every 3 months” or “every 7 days”. For example, if you back date a KPI for a year with an interval of every three months, the program create four history records, one of each quarter.

If you select **Back-date**, enter the start and end dates for which to view data. In the **Interval** field, enter the interval by which to generate data.

Warning: When you back date a KPI instance, you erase any values that fall within the specified date range previously stored for the instance.

6. Click **Start**. The program updates the KPI values and displays the record of the instance. For more information about the items on the record, refer to [KPI Instance Record on page 12](#).

Import and Export KPI Definitions

If you have a KPI definition defined and saved outside the program, you can import the definition as a valid *.xml document. for use in the program. You can also export any KPI definitions from the program as a valid XML document.

> Import a KPI definition

1. From *Analysis*, click **Information library**. The information library appears.
2. Click the KPIs tab.
3. Under **KPI**, click **Import KPI definition**. The Open screen appears.
4. Map to the definition file to import.
5. Click **Save**. The KPI is added to the system.

> Export a KPI definition

1. From *Analysis*, click **Information library**. The information library appears.
2. Click the KPIs tab.
3. In the grid, select the instance to export and select the KPI instance name. The record of the instance appears.
4. Under **Tasks**, click **Export definition**. The Open screen appears.
5. Select **Save File** and click **OK** to export the KPI to the default download folder.

Organize KPIs

You can organize KPIs to make them easier to navigate in the information library.

- To mark a KPI as a favorite, click the star next to the KPI's name.
- To move KPIs to folders, select "Folder" in the **View by** field. Select the KPI or KPIs you want to move, and click **Move**. In the Move KPIs to folder screen, select a folder and click **Save**.
- To create and edit folders and arrange them in hierarchies, click **Manage folders**.
- To view different details about your KPIs, click **Columns** and select the columns you want to see on the list. You can also filter columns to only see KPIs that meet certain criteria.

KPI Instance Record

The KPI instance record displays details about the indicator values. When you update KPI values, the record appears. The information that appears on the record is based on the parameter selections used when you generate the values. For more information about how to update KPI values, refer to [Generate Values for a KPI Instance on page 10](#).

Goal Status

The Goal status tab displays status information related to the KPI goals. In the **Show** field under **Percent of goal**, you can select to view data for the overall goal or the milestone goal. In the **Show** field under **KPI value chart**, select the time period for which to view status information. You can select a predefined time period or a custom period. If you select Custom, **Start date** and **End date** fields appear so you can define the time span. Also, if you select Custom, you must click **Go** to update the status. If you select a predefined option, the display automatically updates after you make your selection.

Goal Status History

The Goal status history tab tracks KPI status changes. For example, if a KPI's status changes from red to yellow or from yellow to green. In addition, this tab is compatible with the **Custom Email Alerts** feature, allowing you to track select KPIs by directing the application to email you every time the status changes. For more information about Email Alerts, refer to the *Administration Guide* .

Recent Status

The Recent status tab displays information about the most recent KPI instance update. For example, if the update "Completed," dates and times of the last update, number of records processed, number of exceptions, and much more.

History

Each time you run a KPI process, the program generates a status record of the instance. On the History tab, you view historical status record information about each instance of the KPI process. The information in the grid includes the status of the instance; the start time, end time, and duration of the

instance; the person who started the instance; the total number of records processed during the instance; and the server used to run the process for the instance.

Note: For information about how to create a KPI instance, refer to [Add KPI Instances on page 7](#).

Depending on your security rights and system role, you can delete a status record from the grid on the History tab.

Job Schedules

You can create a job schedule to automatically generate KPI instance values, such as during off-hours. This job scheduler uses the SSIS packages, which can make web service calls to the program so you can create a *SQL Server Agent* job through the program shell. You can use *SQL Server Agent* jobs to generate KPI instances automatically and opt to run the task on a recurring basis. When you create a job schedule, you define the conditions that cause the job to run.

Add a Job Schedule

When you click the **Add** button on the Job schedule tab, the Create job screen appears. From this screen, you define your automated job schedule.

> Add a New Job Schedule

1. From the Job Schedules tab, select **Add**. The Create job screen appears.

2. In the **Job name** field, enter a name for the job schedule. This will help to identify the job schedule.
3. Select the **Schedule type** for the job. The schedule type dictates when and how often a job schedule will run.
4. The job schedule is **Enabled** by default. To suspend the job schedule, deselect the **Enabled** checkbox.
5. If the **Schedule type** is set to "One time," the One-time occurrence options will be available. Select the **Date** and **Time** for the job schedule to run.
6. If the **Schedule type** is set to Daily, Weekly, or Monthly, the Frequency, Daily frequency, and Duration options will be available. Use these options to determine exactly when and how often the schedule will run.

Note: The Frequency, Daily frequency, and Duration options will change depending on the selected **Schedule type**.

7. Select **Save**.

Create Yahoo! Widgets for a KPI Instance

With the Yahoo! *Widget Engine*, you can run applications called “widgets” on your desktop. You can add KPI widgets to your desktop so you can view the most up-to-date values every time you turn on your computer.

Note: Before you can use the Yahoo! widget functionality, you must download the free Yahoo! *Widget Engine* from <http://widgets.yahoo.com/>.

➤ Create a KPI Yahoo! widget

1. From *Analysis*, click **Information library**. The information library appears.
2. Click the KPIs tab.
3. In the grid, select the process for which to create a widget.
4. On the action bar, click **Go to KPI instance**. The record of the instance appears.
5. Under **Tasks**, click **Create Yahoo! widget**. A zip archive that contains the widget files will download.
6. Unzip the files and double click the Yahoo Widget file.
7. The program creates a widget for the selected KPI.
8. To view the widget, double-click on its icon. To view the graph and thermometer representation of the KPI value, click the **Trend** field.

Manage RSS Feed

You can enable your KPI data consumers can monitor KPI values from outside of the program. On a KPI Instance record, select the Goal Status History tab. Select **More** and click **View RSS feed**. Your web browser opens and displays the updates for the KPI instance whenever the status changes from one threshold value to another.

You can provide the address of the web page to your KPI data consumers. With the web address, they can then subscribe to the feed, add it to their **Microsoft Feeds** list, and generate up-to-date KPI data from their web browser at any time.

Key Performance Indicator Dashboard

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All users have a personal dashboard, displaying Key Performance Indicator data. The KPI dashboard stores all KPI values and statistic information in an easy to view format.

The dashboard includes data from every KPI instance for which the user has permission. For information about establishing permission settings, see [Assign KPI Permissions on page 10](#).

You can customize the dashboard view, making it even easier to access the specific information you need. You can also export the information to Microsoft *Excel* or generate a PDF.

View KPI Dashboards

Whenever you generate values for a KPI instance, the values are automatically added to the KPI dashboard.

Dashboards are permission-based, so only KPIs for which you have permission appear on the dashboard panel.

➤ View KPI data from a dashboard

1. To view the dashboard, either click the **KPI dashboard** link from the Data page, or if you are working on the KPI instances page or in a KPI instance record, click the **KPI dashboard** link in the **Tasks** pane on the left side of the screen. The KPI dashboard page appears.

In addition, if can access an context-sensitive KPI instance dashboard from your record in the program. For more information, see [Types of KPIs on page 5](#).

Note: For information about accessing the Data page or the KPI instances page, see [Access KPIs on page 5](#) or [KPI Instance Record on page 12](#).

2. From the KPI dashboard page, in the **Time span** field, select the time period for which you want to view status information. You can select a predefined time period or a "Custom"

period. If you select “Custom”, **Start date** and **End date** fields appear, allowing you to define your time span. Also, if you select “Custom”, you must click the **Go** button to update the status display. If you select a predefined option, the display automatically updates after you make your selection.

3. The dashboard includes the following information:
 - A color-coded line displaying the KPI status
 - A graph displaying KPI value trends
 - The data represented in the thermometer and graph

Customize KPI Dashboard

The **Customize dashboard** option allows you to arrange your dashboard to meet your specific needs. For example, if your KPI dashboard page includes value information for 20 or 30 KPI instances, you spend a good deal of time scrolling through this very long list, trying to locate specific instance information. With **Customize dashboard**, you can create different dashboard pages on which to store specific instance data. You can also arrange information in tabs, making it easy to access different instance data while working on the same page.

Manage KPIs

While working in the **KPI dashboard**, you can access the KPI instances page by clicking **Manage KPIs**.

Export KPI Dashboards

You can easily share KPI dashboard data with users outside the program. In addition to printing out the dashboard page, you can also export the information, creating either an *Excel* spreadsheet or a PDF.

Note: You can also export to *Excel* and *Acrobat* PDF from the web view. For more information, see [View Web Dashboard on page 1](#).

➤ Export a KPI Dashboard data to an Excel spreadsheet

1. From the KPI dashboard page, right click.
2. Select **Export, Excel**. The Save as screen appears.
3. Select a **Save in** location.
4. Enter a **File name** for the *Excel* spreadsheet about to be generated.
5. Click **Save**. The dashboard information is saved to the new spreadsheet.

➤ Export a KPI Dashboard data to a PDF

1. From the KPI dashboard page, right click.

2. Select **Export, Acrobat (PDF) file**. The Save as screen appears.
3. Select a **Save in** location.
4. Enter a **File name** for the PDF about to be generated.
5. Click **Save**. The dashboard information is saved to the PDF.

Web Dashboard



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The Web Dashboard presents information from your database in one consolidated location using dynamic tools such as lists, charts, gauges, and web content from external web sites. Users customize the content, appearance, and layout of the parts and pages that make up the Web Dashboard site. Other users can view or manipulate parts for their own needs. For example, users can select the dates or records displayed in the part. Administrators can define permissions so only specified users have view or edit rights for the site, pages, and parts.

Parts on the same page can be connected so they share data. Using a part's embed code and direct URL, you can embed the part in other web applications, or use it with Microsoft *Vista* or 7 gadgets or *Yahoo!* widgets.

Blackbaud Dashboard Page

Use the Blackbaud Dashboard home page to organize your site. If you use multiple databases, you can select the database you want to use for the site. Once you select a database, you access the Folder Contents page. On this page you can set site and page permissions and add pages and folders.

Site Options

Using the options under the **Site Options** field, you can specify which system roles have rights to edit the site or parts.

Option	Description
Edit Site Privileges	Assign rights to roles. Options include the ability to personalize pages, add new pages, assign page permissions, and add, edit, or delete folders.
Edit Part Privileges	Assign add or edits rights to dashboard parts that are secured.

Folder Options

You can organize pages by adding folders to your site. The **Folder options** field appears on the Folder Contents page of the dashboard.

Option	Description
Add new page	Add a new page to this folder. For more information, refer to Add Pages on page 20 .
Import page	Import an existing dashboard page using an page definition file. You can export a page definition file using the Export page option under Page options . For more information about exporting, refer to Page Options on page 21 .
Add new folder	Add a new sub-folder to this folder.

Add Pages

When you add pages to the site, you define basic properties for the page as well as the layout and context record type.

> Add a page

1. From the Blackbaud Dashboard page, if you use multiple databases, select the database to use. The Folder Contents page appears.
2. Select **Folder options, Add new page**. The Add new page screen appears.

3. In the **Page name** field, enter the file name for the page.
4. In the **Page title** field, enter a title for the page.
5. In the **Description** field, enter a description of the page.
6. In the **Context record type** field, select a record type to base the dashboard on.
7. In the **Default search list** field, select a search type. The options available depend on the context record type you selected.
8. In the **Layout** field, select the web page layout. When you select a layout, a preview appears on the left demonstrating column, header, and footer positions for each layout.
9. Click **Save**. You return to the Folder Contents page which displays a link to the new page.

Page Options

The **Page options** field appears on the page view of the dashboard.

Page Option	Description
Edit personal version of this page	Displays the personal version of the page in edit mode. Any changes you make to the personal version are visible only to you.

Page Option	Description
Edit shared version of this page	Displays the shared version of the page in edit mode. Any changes you make to the shared version are visible to any users who view this page.
Show shared view	From the personal version, select this option to display the shared view of the page.
Show personal view	From the shared version, select this option to display the personal view of the page.
Reset page content	When editing the personal version, select this option to remove all personalization settings from the page.
Edit page information	Edit the page name, title, description, context record, or default search list.
Copy page	Make a copy of the page.
Move page	Move the page to a different folder.
Export page	When editing the shared version, select this option to export the shared settings for the page. You can save the page definition file and later import it using the Import page option under Folder options . For more information about importing, refer to Folder Options on page 20 .
Edit permissions	Set view and edit rights for the page.
Delete page	Deletes the page.

Edit Pages

After adding a new page, you can edit the personal or shared version. When editing, you can add parts to the page and connect them so they share information.

> Edit a page

1. From the Folder Contents page, click the page to edit. The Page options page appears.
2. Select **Page options, Edit personal version of this page** or **Page options, Edit shared version of this page**. The personal version or shared version of the page appears. Any changes you make to the personal version are visible only to you. Any changes you make to the shared version are visible to any users who view this page.
3. You can edit existing dashboard parts on this page or add additional ones. For more information about how to add dashboard parts, refer to [Add Parts on page 23](#).
4. You can connect parts so they share data. For more information, refer to [Add Connections on page 26](#).
5. Click **Exit edit mode** to return to the view mode of the page.

Add Parts

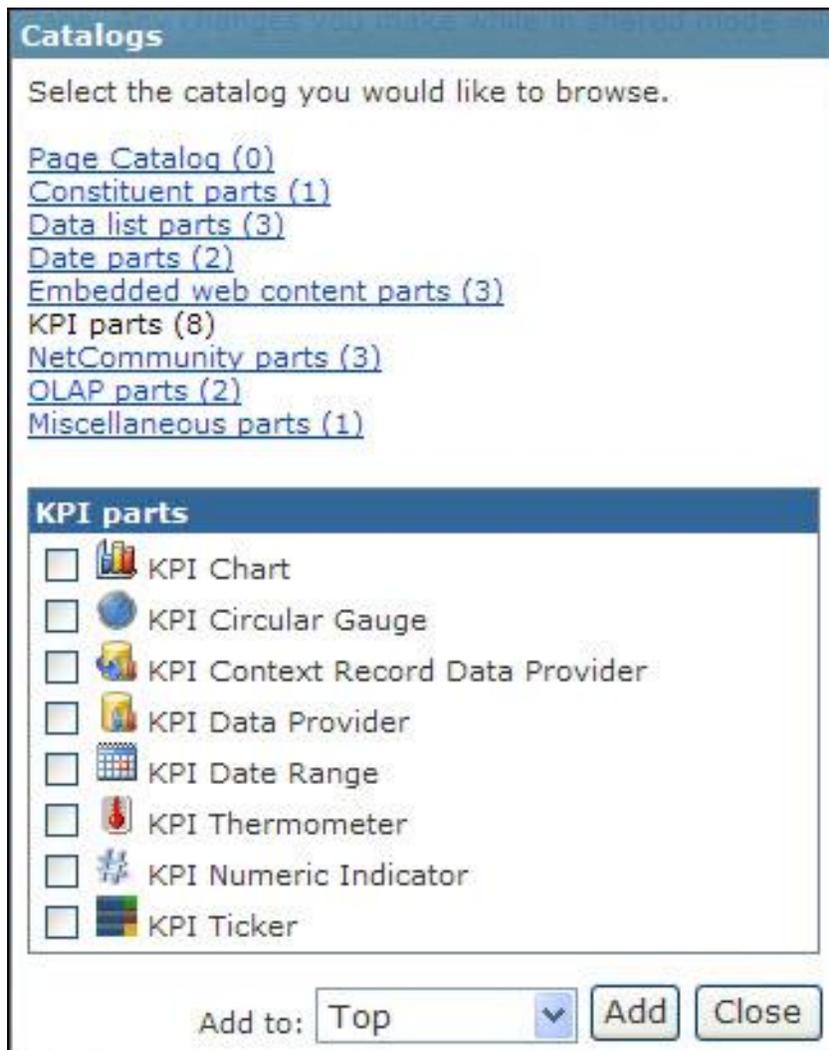
You can add several different types of dashboard parts such as Date and Data list parts, as well as Embedded web content parts.

> Add dashboard parts to a page

1. From a page, select **Page options, Edit personal/shared version of this page**. The edit view appears.
2. Click **Add dashboard item**. The Catalogs screen appears.



3. Select the catalog of parts to browse. When you select a catalog, all the parts available for that type appear.



When you hover your cursor over a part type, a description of the part appears.

4. Select the parts to add.
5. In the **Add to** field, select the area of the page to place the part. For example, if you selected a "Two columns, header, footer" layout for this page, you can place the part in the Top, Left, Right, or Bottom zone.
6. Click **Add**. If the part has formatting options, such as Properties, Appearance, and Layout, a screen appears so you can select these.

KPI chart

Modify the properties of the Web Part, then click OK or Apply to apply your changes.

Chart options

Style:
Area

Text color:
DimGray

Show title

Title font size:
12

Chart area

Chart border

Legend

3D perspective

Appearance

Layout

7. Click **OK**. You return to the page and the dashboard part appears in the selected zone.
8. If you are using *Internet Explorer* as your browser, you can drag and drop dashboard parts to different zones. If you are using any other browser, to move a part, click **Edit** to access the properties screen. In the Layout section, select a different zone.

Tip: For certain part types, a Web properties icon appears when you hover over the part. When you click the icon, the Properties screen appears displaying the part's embed code and direct URL. You can use these to embed the part in other web applications, or to use with Microsoft Vista or 7gadgets or Yahoo! widgets.

9. Continue to add dashboard parts to the page or click **Exit edit mode** to return to the page.

Add Connections

You can connect parts so that one part provides data to other parts to be used for different purposes. For example, you can connect Calendar Date Picker, Date Offset, and KPI Numeric Indicator parts so that users can compare KPIs for a selected date with KPIs for the same date in the previous month. Because the parts are connected, when a user selects a different date for the KPIs, the previous month's date updates automatically.

Tip: "Provider" parts provide data to other parts. "Consumer" parts receive data from other parts. Some parts can be both providers and consumers.

> Connect dashboard parts

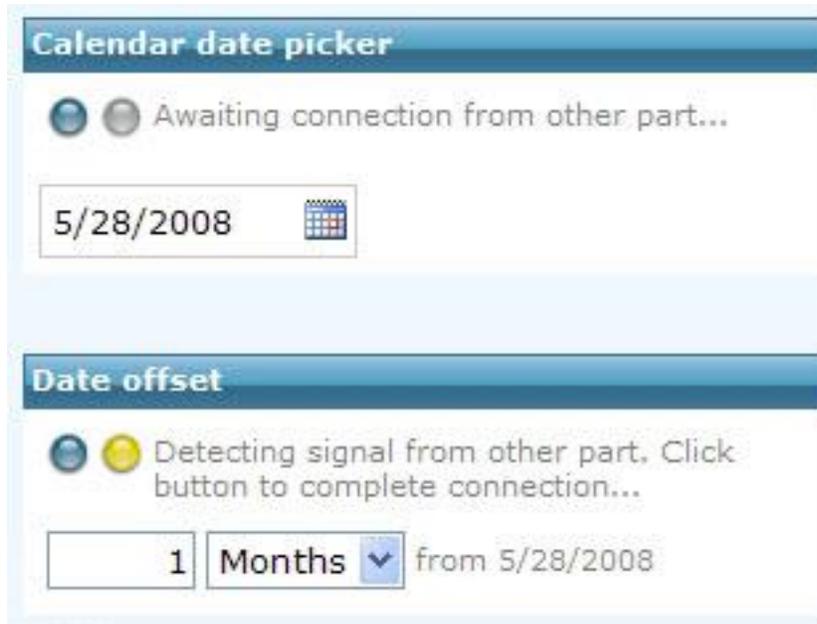
1. From the edit view of a page, add the parts you want to connect, making sure that at least one of them is a provider.
2. Place your cursor over the yellow button for the consumer part. This message appears:



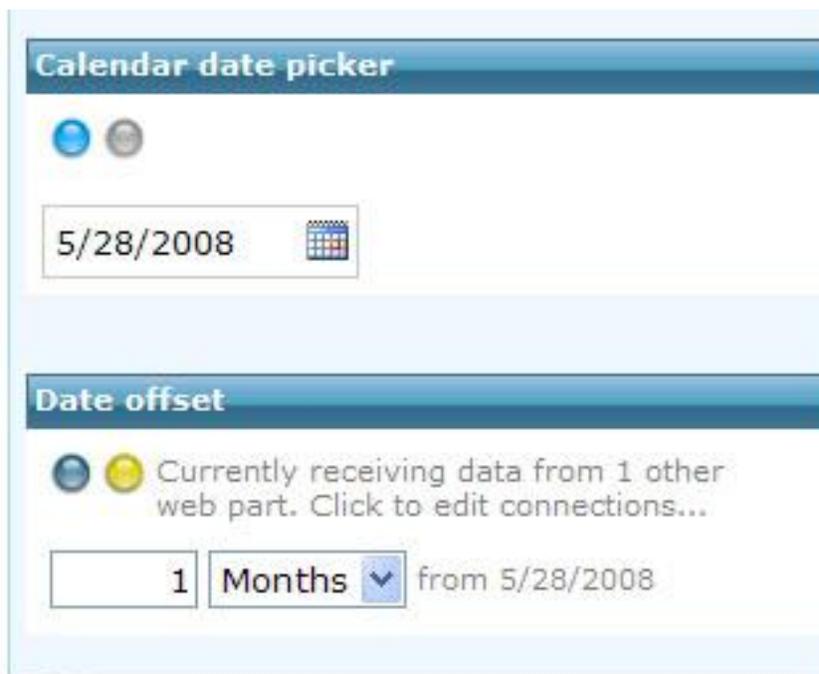
3. Click the yellow button on the consumer. The provider and consumer parts start blinking.



4. Click the blue button on the provider part.



5. Click the yellow button on the consumer part. The parts connect.



Report Options

Reports Toolbar29

This chapter includes information about the various report options available, such as print and export.

Reports Toolbar

When you generate a report, you can use the report toolbar to modify how you view the report. The toolbar buttons are common to all reports.

Toolbar item	Description
First Page	On a report with multiple pages, click this button to return to the first page.
Previous Page	On a report with multiple pages, click this button to return to the previous page.
Current Page	The chronological number of the selected page appears. To navigate to a specific page, enter the page number and press ENTER .
Next Page	On a report with multiple pages, click this button to return to the previous page.
Last Page	On a report with multiple pages, click this button to go to the last page.
Refresh	To refresh information to include new or updated data, click this button.
Export	To select a file format for exporting, click this button. File types include XML file with report data, CSV (comma delimited), TIFF file, pdf file, Web archive, <i>Excel</i> , and <i>Word</i> . Note: In exported reports, such as PDF versions of the reports, some items may appear as links. These currently direct you to the Blackbaud website, instead of to the specific records in the program.
Search Text	To search the report for a word or phrase, enter the text in this field and click Find.
Find	To search for text entered in the Search Text field, click this button.
Next	To search for the next instance of text in the Search Text field, click this button.

Microsoft Excel Add-In



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Programs built on Blackbaud's Infinity platform can integrate with Microsoft *Excel 2007* or *2010* for easy access to Infinity data from within a spreadsheet. You can take advantage of the tools in *Excel*, such as graphs and pivot tables, to present and analyze the data. The data is pulled from the Infinity database and can be refreshed each time the spreadsheet is opened or can be refreshed on demand.

Set Up Microsoft Excel Add-In

To install the Microsoft **Excel** Add-in, you can use a utility on the Utilities, Gadgets, and Reference page that you access from the application start page. After you install the add-in, a Blackbaud tab appears on the ribbon in **Excel**. You can then select ad-hoc queries, data lists, or KPIs in the program to create spreadsheets with data from your database. For more information about how to install the add-in, refer to the *Installation Guide* and the *Update Guide*.

Data Options in Excel

You can display data from your database in the spreadsheet using ad-hoc queries, data lists, or KPIs. After you display data in the spreadsheet, you can use the standard tools in *Excel* to format, graph, and analyze it.

Ad-hoc Query in Excel. On the Blackbaud tab, click **From Ad-hoc Query** to display data from an Infinity ad-hoc query. The results of the query — the fields and data from the results tab of the ad-hoc query — appear in the spreadsheet.

Data Lists in Excel. On the Blackbaud tab, click **From Data List** to select an Infinity data list. Many data lists require a record to be selected so the data is in context. For example, the "Constituent 5 Year Giving" data list needs a constituent record for context. When you select this data list, you must also select a constituent. The information from the data list, including fields and parameters, is displayed in the spreadsheet. You can change the parameters to update the information in the fields.

KPIs in Excel. On the Blackbaud tab, click **From KPI** to select an Infinity KPI instance. The KPI instance must already exist in order for the data to display in a spreadsheet.

Smart Query in Excel. On the Blackbaud tab, click **From Smart Query** to display data from an Infinity smart query. The results of the query — the fields and data from the results tab of the smart query — appear in the spreadsheet.

Note: Query results are restricted to 500 records. If your results exceed the 500 record limit, you can save your query and create an export instead of using the Excel Add-in functionality.

Prospect Research Reporting

Opportunity Pipeline Report	32
Prospect Plan Analysis	33
Prospect Plan Follow-Up Report	33

Major Giving includes several tracking and reporting options, enabling you to quickly and easily generate basic reports tracking a variety of major giving activities. For example, you can generate a **Prospect Plan Analysis** to review details about the various plan types included in your system, including status and ask amount information; you can generate an **Opportunity Pipeline Report** to review details about your fundraisers and ask opportunities; and much more.

Major Giving includes several reporting options, allowing you to quickly and easily generate basic reports tracking a variety of major giving activities.

Opportunity Pipeline Report

The **Opportunity Pipeline** report helps you track all ask opportunities in your fundraiser pipeline. You can see which opportunities are Accepted, Rejected, Qualified, Unqualified, or Canceled along with the name of the fundraiser responsible for the opportunity. You can filter the report based on a fundraiser or designation query, ask date, plan type, plan stage, and prospect status.

Fundraiser	Unqualified	Qualified	Response Pending	Accepted	Rejected	Canceled	Total
Zachery Allenbaugh	1	1			1		3
Arthur Andrews					1		1
Katherine Andrews				1	1	1	3
Jeffrey Ashton						1	1
Meredith Ashton				1			1
Orla Autumn					1		1
Kirby Beckner		1					1
Mia Bently	1					1	2
Jessica Biel	1	1		1			3
Theresa Cavanaugh						1	1
Doug Cohen						1	1
Roger Cone	1	1		2			4
Louis Daniels	1			1	1		3

Prospect Plan Analysis

The **Prospect Plan Analysis** provides details about selected or all plan types in your system. You can base the report on selected prospects or all prospects and filter on a variety of options: prospect status, opportunity status, plan type, plan stage, and dates. You can even select how you want information grouped.

Prospect Plan Analysis									
Selected prospects:		Plan type:		Group by:		Prospect Manager			
Prospect status:		Plan stage:		Date range:		This year			
Opportunity status:		Include inactive plans:		Date to use:		Ask date			
Prospect Manager	Prospect	Plan Type	Opportunity Status	Ask Amount	Response Amount	Difference	Ask Date	Response Date	Days Open
Gretta Yang									
	Florian Daniels	Major giving	Canceled	\$315,369.12	\$0.00	\$315,369.12	9/7/2007	9/14/2007	7
	Benlman Davenport	Major giving	Rejected	\$136,996.59	\$0.00	\$136,996.59	8/25/2007	9/1/2007	7
	Willa Graack	Major giving	Qualified	\$125,906.85	\$0.00	\$125,906.85	9/12/2007	9/19/2007	7
	George Payne	Major giving	Response Pending	\$1,122.14	\$0.00	\$1,122.14	7/29/2007	8/5/2007	7
Sub total				\$579,394.70	\$0.00	\$579,394.70			
Dianne Wilson									
	Andrea Avdeenko	Planned giving	Qualified	\$12,617.19	\$0.00	\$12,617.19	8/3/2007	8/10/2007	7
	Elizabeth Baker	Major giving	Response Pending	\$1,083.16	\$0.00	\$1,083.16	10/6/2007	10/13/2007	7
	George Daly	Major giving	Accepted	\$1,039.35	\$1,039.35	\$0.00	7/29/2007	8/5/2007	7
	Gretta Ferber	Major giving	Qualified	\$1,544.34	\$0.00	\$1,544.34	8/31/2007	9/7/2007	7
	Anthony Jacobson	Major giving	Unqualified	\$16,719.67	\$0.00	\$16,719.67	9/6/2007	9/13/2007	7
	Isabelle Simpson	Major giving	Qualified	\$1,086.92	\$0.00	\$1,086.92	8/2/2007	8/9/2007	7
	Clarice Smith	Major giving	Rejected	\$6,302.77	\$0.00	\$6,302.77	8/25/2007	9/1/2007	7
	Frederick Taylor	Major giving	Response Pending	\$22,797.49	\$0.00	\$22,797.49	9/23/2007	9/30/2007	7

Prospect Plan Follow-Up Report

The **Prospect Plan Follow-up report** helps you track planned, pending, or completed steps for selected prospects. You can view steps for a specific plan stage or type, and limit the results to a certain contact method or fundraiser assigned to the step. With this report, you can easily determine the status of all or selected prospect plan steps.

Prospect Plan Follow-Up						
Prospect query:		Plan stage:		Contact method:		
Prospect manager: Kelly Lambert		Plan type:		Include historical plans: No		
Fundraiser:		Prospect status:		Include completed steps: No		
Only show steps owned by this fundraiser: No		Step date: This year				
Constituent	Plan Type	Prospect Manager	Plan Stage	Step Status	Owner	Additional Fundraisers
Step	Date	Contact Method				
Katherine Andrews						
Major giving						
	9/7/2009		Phone call	Planned	Collin Nolan	Kelly Lambert, Cynthia Rose
	9/26/2009		Phone call	Planned	Collin Nolan	Kelly Lambert, David Dubose, Cynthia Rose
	10/8/2009		Phone call	Planned	David Dubose	
	11/3/2009		Phone call	Planned	Collin Nolan	
	12/2/2009		Phone call	Planned	Collin Nolan	