



*Last Updated: December 2006*

## **II.4 Flash Report Procedures**

### **General Information**

#### **Daily/Weekly Reports**

#### **Monthly Reports**

#### **Quarterly Reports**

#### **Fiscal Year End Reports**

### **General Information**

The following specifies how the file names should be generated. Each “section” should be separated by a dash.

- Section 1:  
The type of the report
  - DAR = Development Activity Reports
  - PMAT = Prospect Management Reports
- Section 2:  
Which report it is
  - Plain = Development Activity Report
  - Compare = Development Activity Report (Giving Comparison)
  - FY = Development Activity Report (FY Breakdown)
  - Chanc = Development Activity Report (Chancellors Report)
- Section 3:  
The time period. Usually either the month, quarter (abbreviated Q) or Fiscal Year
- Section 4:  
Summary or Detail to show which type of report it is

For all reports, the “Print Report Parameters” should be set to “No” unless the report runs with errors or you are specifically requested to show the parameters. Gift detail should also be set to “No” unless specifically requested.

### **Reports to be sent to**

The flash reports should be sent to: All Foundation Staff, Vice Chancellor for Advancement Services and Community Engagement (UAF), Associate Vice Chancellor for Development (UAF), Senior Development Officer (UAF), Development Officer (UAF), Annual



Giving Director (UAF), Director of Development and Outreach (KUAC, UAF), Director of Development (UA Museum, UAF), Vice Chancellor of University Advancement (UAA), Major Gifts and Planned Giving Manager (UAA), Annual Giving Manager (UAA), Senior Development Officers (UAA), and the Director of Development (UAS).

Detail reports should be sent to: the Foundation President (SW), User Relations Manager (SW), Foundation Database Administrator (SW), Vice Chancellor for Advancement Services and Community Engagement (UAF), Associate Vice Chancellor for Development (UAF), Associate Vice Chancellor for Development (UAF), Senior Development Officer (UAF), Development Officer (UAF), Annual Giving Director (UAF), Director of Development and Outreach (KUAC), and the Director of Development (UA Museum).

### **Daily/Weekly reports**

To be filled in later... Don't worry Marc, most of the daily/weekly ones will be automatically run and sent, but I want to detail them out here incase things go bananas... And these have some time before we will be worrying about them.

### **Monthly Reports**

These reports should be run for the previous month after all batches have been committed in RE. These reports will be sent in two emails to the Foundation President, User Relations Manager, and Database Administrator. The first email will contain the summary reports for the month, and the second email will contain the detail reports. To create the summary report, leave the UAF Breakdown parameter set to "N". For the detail reports, set it to "Y".

The reports to be included (in both emails):

- **Development Activity Report**
  - Include crosstabs
  - **For the flash report:** Combine this report and the giving comparison report together, titled "<Month> Flash Report".
- **Development Activity Report (Giving Comparison)**

Note: If it is the first month of the fiscal year (7/1/XXXX to 7/31/XXXX), use the Development Activity Report (Short Giving Comparison)

  - Just run the report
  - **For the flash report:** Combine this report and the giving comparison report together, titled "<Month> Flash Report".



## **Quarterly Reports**

These reports should be run for the previous quarter after all batches have been committed in RE. These reports will be sent in two emails to the Foundation President, User Relationship Manager, and Database Administrator. The first email will contain the summary reports for the month, and the second email will contain the detail reports. The monthly reports should also be run for the appropriate month, so you will have 4 emails that are sent. To create the summary report, leave the UAF Breakdown parameter set to “N”. For the detail reports, set it to “Y”.

The reports to be included (in both emails):

- **Development Activity Report**
  - Include crosstabs
  - **For the flash report:** Combine this report and the giving comparison report together, titled “<Quarter> Flash Report”.
- **Development Activity Report (FY Breakdown)**
  - Include crosstabs
  - **NOTE:** This report is designed to be run across fiscal years. You should select 4 years worth of data. For example, for 3<sup>rd</sup> quarter FY07, the dates should be 7/1/2003 to 3/31/2007.
- **Development Activity Report (Giving Comparison)**

Note: If it is the first quarter of the fiscal year (7/1/XXXX to 9/30/XXXX), use the Development Activity Report (Short Giving Comparison)

  - Just run the report
  - **For the flash report:** Combine this report and the giving comparison report together, titled “<Quarter> Flash Report”.
- **Development Activity Report (Chancellors Report)**
  - Just run the report.
  - **NOTE:** This report must be run out of Crystal Reports. The charts resize themselves every time, and I have not been able to come up with a creative solution to this problem. On each page, you must right click on the chart and select “auto-arrange,” then move the “By Fiscal Year” text out of the chart.
  - **NOTE:** This report is designed to be run across fiscal years. You should select 4 years worth of data. For example, for 3<sup>rd</sup> quarter FY07, the dates should be 7/1/2003 to 3/31/2007.



## **Fiscal Year end reports**

These reports should be run for the previous fiscal after all batches have been committed in RE. These reports will be sent in two emails to the Foundation President, User Relationship Manager, and Database Administrator. The first email will contain the summary reports for the month, and the second email will contain the detail reports. The monthly and quarterly reports should also be run for the appropriate month and quarter, so you will have 6 emails that are sent. To create the summary report, leave the UAF Breakdown parameter set to “N”. For the detail reports, set it to “Y”.

The reports to be included (in both emails):

- **Development Activity Report**
  - Include charts and crosstabs
- **Development Activity Report (FY Breakdown)**
  - Include crosstabs
- **Development Activity Report (FY Only)**
  - Include crosstabs
  - **NOTE:** This report is designed to be run across fiscal years. You should select 4 years worth of data. For example, for FY07, the dates should be 7/1/2003 to 6/30/2007.
- **Development Activity Report (Giving Comparison)**
  - Just run the report
- **Development Activity Report (Chancellors Report)**
  - **NOTE:** This report is designed to be run across fiscal years. You should select 4 years worth of data. For example, for FY07, the dates should be 7/1/2003 to 6/30/2007.

## **As Requested Reports**

This section details how to print “as requested” reports. Please verify all criteria/statements with the requestor as the following parameters have been included as samples.

- **Report – Monthly Giving Report by CASE/IRS**
  - Input the amount to be tested for
  - Export the list to excel
  - Combine up the campuses
  - Cleanup the titles
- **BOT Giving Report**
  -
- **BOR Giving Report**
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