

Executive Summary

The **Executive Summary** tab in the Advancement layer uses viewport graphs and tables to summarize the key performance indicators of fundraising at your institution. It also bridges the gap for smaller advancement organizations that may have gift officers coincidentally working on Annual Giving and Major Giving efforts.

Fiscal Year Drop Down

The fiscal year period for all reports in the tab is controlled by the fiscal year drop down in the bar at the top of the tab. Changing this selection will refresh all of your selected viewports.

Measurement Drop Down

Transaction Viewports allow you to select from several measurements for counting dollars and donors. This selection is available on the upper right corner of the transaction viewports, and your preferences will be saved, so that if you switch all of your viewports to the Commitment measurement, they will appear that way the next time you return to the tab. The following measurement options are available:

- **Cash:** Includes gift and pledge payment transactions. This reflects actual dollars received during the period, and donors that paid during the period.
- **Commitment:** Includes gift and pledge transactions. This reflects dollars generated, or committed, during the period and donors who made some kind of commitment during the period, whether or not they paid during the period.
- **Pledge:** Includes only pledge transactions, for which cash may or may not have been received.

Viewport Preferences

Any changes made to Viewport preferences are saved and will appear that way the next time you return to the tab. For example, if you switched the measurement of a Viewport from Cash Dollars to Commitment Dollars, the Viewport would be set to Commitment Dollars the next time you return to the tab.

Viewport Administration

To change which Viewports appear in your six viewport windows, click "+Viewports" in the upper right corner. Then, from the window that pops up, choose the Viewport you would like to add and click Add to Dashboard. Finally, select the viewport you would like to replace.

Drill Down

Click any of the charts or links in the Viewports to see a detailed list of the records included in the report.



Please review the following sections for more information on the Viewports in this tab: