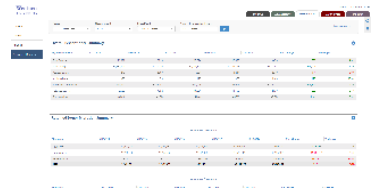


# Operating Reports Tab

The **Operating Reports Tab**, located in the Annual Giving Layer, lets you dissect the performance of your annual giving by the various school/units and constituent groups. In this tab, you can set the context of all underlying Viewports based on specific school/unit giving designations and primary relationship types. You can also choose the measurement and period for all of the Viewports. One thing to note, when you switch any of the selections in the drop downs, all Viewports on the page will reload based on those selections.



The screenshot shows the 'Operating Reports' interface. At the top, there are several filter buttons: 'All', 'School/Unit', 'Primary Relationship Type', 'Measurement', and 'Period'. Below these, there are two main sections. The first section, 'School/Unit Giving Designation Filter', shows a list of designations with a search bar and a 'Filter' button. The second section, 'Primary Relationship Type Filter', shows a list of relationship types with a search bar and a 'Filter' button. Below these filters, there are two data tables. The first table, 'All Viewports', shows a list of viewports with columns for 'Name', 'Unit Change', and '% Unit Change'. The second table, 'All Viewports (Expanded)', shows a detailed view of the viewports with columns for 'Name', 'Unit Change', '% Unit Change', 'Donor Count', 'Total Amount', and 'Average Amount'.

Each Viewport contains two columns called **Unit Change** and **% Unit Change**. Unit Change calculates the numeric change of the measured values (e.g. donors, dollars, etc.) in the two most recent time periods displayed in the report. The % Unit Change column calculates the change between the two most recent time periods displayed in the report on a percentage basis. Positive numbers are highlighted in green and negative numbers are highlighted in red.

Throughout all the Viewports you will notice that the donor counts in the reports are links. You can click on any of the donor links to drill into the detail and view the donor list.

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## Period Drop Down

Located at the top of the page within the tab, the Period drop down allows you to switch between Fiscal Year, Fiscal Year to Date, Calendar Year, and Calendar Year to Date.

## Measurement Drop Down

Located at the top of the page within the tab, the Measurement drop down allows you to switch the measurement between Cash, Commitment, and Pledge. The Cash measurement includes all gifts and pledge payments and is useful for assessing what your fundraising efforts are bringing in the door. The Commitment measurement includes all gifts and pledges and is useful in assessing the long-term value being generated by your fundraising efforts. The Pledge includes only pledges.

## School/Unit Giving Designation Filter

Located at the top of the page within the Tab, you will find a drop down called School/Unit Giving Designation. This allows you to filter the results to include only the selected School/Unit Giving Designations. The “No School/Unit” option at the end of the list includes transactions where no school/unit giving designation was provided.

## Primary Relationship Type Filter

Also located at the top of the Tab is a drop down called Primary Relationship Type. This allows you see results only from the entities associated with the Primary Relationship Types selected in the filter. Primary Relationship Type is provided by your institution in the nightly feed. Some entities may have multiple relationship types (e.g. “Parent” and “Alumna”), but your institution chooses one Primary Relationship Type for each entity. The “No Relationship Type” option at the end of the list includes donors where no Primary Relationship Type was provided.

## Collapsible Viewports

Each Viewport in the Operating Reports tab is collapsible. You can expand or collapse individual Viewports by clicking Expand/Collapse arrow button at the upper right of each viewport.

## Export Viewports

Each Viewport in the Operating Reports tab is exportable as an Excel file. Just click on the gear icon at the top right of each viewport.

## Viewport Administration

To change which Viewports appear in the Operating Reports, click the “+ VIEWPORTS” button at the top of the page. Use the check box on each Viewport in the menu to choose which are displayed and which are hidden. You can also use the menu to rearrange the Viewports to the desired order by dragging the boxes up or down.

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