

Project Reporting

The **Project Reporting** dashboard, located in the Advancement layer, provides a detailed perspective of projects within your organization's capital campaign. It reports on both gifts and proposals associated with the projects selected.

Campaign Project Dropdown

To start, choose a project from the **Campaign Project** dropdown at the top of the page. Each of the viewports below will only show gifts and proposals that are directly associated with the selected projects.

The list of projects displayed in that dropdown come from the list of projects sent to FPM via your nightly files. If you see an issue with those projects, contact your system administrator.

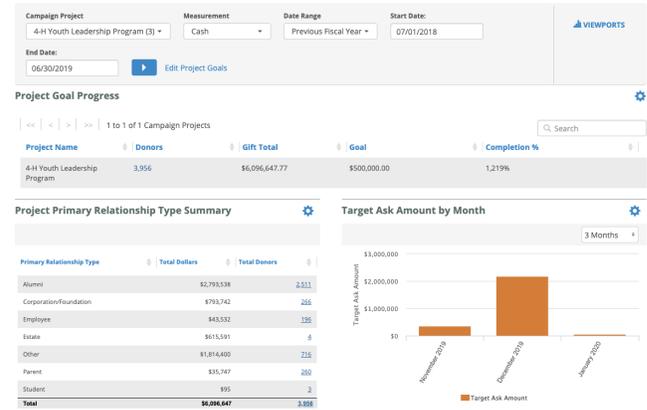
Measurement Dropdown

Located at the top of the page within the dashboard, the Measurement dropdown 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 of your fundraising efforts. The Pledge measurement includes only pledges. When you switch the measurement, all of the Viewports on the page will reload based on that measurement.

Date Range Filter

Located at the top of the page within the dashboard, you will find a drop down called Date Range. Unlike other areas of FPM, the Project Reporting dashboard allows you to choose any range of dates to report on. All of the viewports on the page will update to only return data within the dates selected.

You can either choose a predetermined range from the Date Range dropdown, or set a custom range by using the Start Date and End Date filters.



Editing Project Goals

The [Project Goal Progress](#) viewport compares the gifts collected against a defined dollar-amount goal for the project. To set a goal, click the **Edit Project Goals** link near the top of the page. (If you don't see that link, you may not have permissions to edit goals. Contact your System Administrator in that case, who can give you access.)

Editing Single Goals

To edit the goal on a single project, click the Edit link in the Actions column for the project. From there you'll be able to define a new goal for that one project.

Editing Multiple Goals

Clicking the blue Edit Multiple Goals button allows you to set the goal for more than one project, by uploading a list of goals to FPM. To use this feature:

1. Click the blue Generate File button. This will download a .CSV template for you to use. The file generated will contain only the projects currently displayed.
2. Open the file with Excel or a similar tool.
3. Add the goals to the CSV file and hit save within Excel.
4. In FPM, click the Import Goals button and upload the file.

After uploading, the feature will verify that your data is in the correct format and then apply your new goals to the appropriate projects.

Filtering the List of Projects

There are four filters you can use to refine the list of projects displayed when setting goals:

1. **Goals Status:** filters projects based on if they have a goal set currently.

The 'Edit Goal' form shows the 'Campaign Project' as '4-H Youth Leadership Program (3)'. The 'Goal Amount' is set to '\$ 500,000'. There are 'Cancel' and 'Submit' buttons at the bottom.

2. **Gifts Received:** filters projects based on if they have received gifts of any type
The next two filters only display if the previous filter is set to "Only projects with gifts"
 3. **Campaign:**
Selecting a campaign will only show projects with gifts that fall within that campaign's criteria. Choosing more than one campaign shows results for all campaigns selected. Disabling the filter (or choosing no campaigns) will ignore this filter in the results.
 4. **School/Unit:** Selecting a school/unit will only show projects with gifts designated to that school/unit. Choosing more than one school/unit shows results for all values selected. To see all projects regardless of school/unit, choose all values (including the No School/Unit option at the bottom of the list).
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Please review the following sections for more information on the Viewports in this tab: