Campaign Reporting

Pro-tips on How & Where to Start your Storytelling

YourCause + blackbaud

Better Together.

Tableau Fields (Giving Campaign)

**If your campaign includes Payroll, use the Pledge Datasource. If your campaign does not include Payroll, use the Giving Datasource.*

- **EmployeeDoNotWishToParticipate** = Can report on those who have opted out of the campaign
- ***Giving CampaignName** = Isolate data to show from a single campaign or add multiple campaigns for comparison reporting
- **Custom Combination Date** based on donation type
  - See Calculated Field Bank
- ***Pledge Create Date** = When the employee took action in the site
- **Donation Type** = Can use to split reports by employee donations versus company matches
- **Is Payroll Pledge Active** = Filter out anything that is false as this will allow you to exclude cancelled pledges
- **Is Payroll Pledge One Time** = Will allow you to differentiate your report based on whether a pledge is one time or recurring
- **Employee Attribute Fields** as needed such as Business Unit, Region, Division, Employee Work Country, Employee Work City, etc.
- ***Giving CampaignTotal** = Single source for pulling totals across ALL donation types including pledge recurring payroll annual totals and matching gift

Tableau Fields (Volunteering Campaign)

**Use the Volunteer Participation Data Source for more granular reports based on employee participation.*

**Use the Events DataSource for reporting on events that do not have participation or if you need any information on event capacity. Event capacity is only available via the Events DataSource.*

- ***Event Campaign Name** = Isolate data to show from a single campaign or add multiple campaigns for comparison reporting
- **Employee Attribute Fields** as needed such as Business Unit, Region, Division, Employee Work Country, Employee Work City, etc.
- **Event Creator Fields** as needed
- **Is Waitlist** (0 = Has not participated / 1 = Has participated)
- ***Sign-up Date** = When the employee took action
- **Event Category** = Can be customized by client and data can be filtered by Event Category
- **Event Type** = Can be customized by client and data can be filtered by Event Type
- **General Tags** = Can be customized by client and data can be filtered by Tags
- **Wildcard Search** = Allows you to search any field by keyword
  - See Calculated Field Bank

- *Recommend using **Event Location fields** as it will allow you to report out on where reporting happened
- **Is Virtual** = Is the event Virtual (T/F)
- **Event Classification** = Allows you to differentiate between individual and team
- **Employee Volunteer Hours** = Hours volunteered by employees
- **Guest Volunteer Hours** = Hours volunteered by guests
- **Total Volunteer Hours** = Combined total hours for employees and guests
- ***Hour Formatting** = Update your hour format(s) to show with decimals

Campaign Tracking (Giving)

The Campaign Tracker allows Clients to view a snapshot of their Giving Campaign. After setting specific goals, Program Administrators can track progress through percentages, charts, and graphs.

The tracker also allows for cross-campaign comparisons to be made as easily as selecting the two campaigns you wish to compare from a drop down list.

The Campaign Tracker is viewed in the Client Admin Panel under Dashboards. Work with your Account Manager to give permissions to those that can view the Campaign Tracker.

Other Pre-Made Reports (Giving)

- Client Admin Panel -> Legacy Admin Panel -> Campaign -> Reports:
    - Campaign Individual
    - Campaign Charity
    - Campaign Transactional
    - Campaign Geo
    - Campaign BU
    - Campaign Company
- Client Admin Panel -> Legacy Admin Panel -> Reports -> Give:
    - Opt Out
- Client Admin Panel -> Reports -> Data Hub -> Data Feed:
    - All Giving Data Feed
    - Pledges Data Feed

Other Pre-Made Reports (Volunteering Campaign)

- Client Admin Panel -> Volunteer -> Campaign Feed -> Export Summary
    - Quick way to obtain event IDs using the export if you receive any questions
    - High level information and mostly useful to see what the event volume is and where the volume is coming from
- Client Admin Panel -> Data Hub:
    - Event Report
    - Volunteer Transactional