

Query vs. Report in The Raiser's Edge

Good reporting. Simple reporting. Accurate reporting. It's the dream of every Development team. As your database colleague, it's certainly my dream for you! If you're like most organizations I encounter, you may constantly ask yourself when should I use a query and when should I use report.

In this document, our team offers insight on when to use Raiser's Edge Queries and Reports.

When you want...	Query	Reports	Notes
to pull a list of board members for a mailing	X		Use a query to pull the list of board members. However create an export in Export based on the query you created to export the addresses. If you export the addresses from Query results you will most likely have duplicate rows and will need to clean up the rows in Excel.
the results to display a grand total of all of the constituents' giving		X	
to see which constituents have given an individual gift of a specific amount or a total of a specific amount.	X		Example: all constituents who have given a single gift of \$1,000 during the last two fiscal years or all constituents who have given a total of \$1,000 in the last two years.
the results to display a constituents giving history, addresses, etc.		X	Use the Constituent Giving History Report
to display a count of the number of gifts or constituents whose records contain specific field values.		X	Use the Report, Tallies , to calculate statistics, such as how many constituents with a particular constituent code are in a particular age group. The exact data included depends on your parameter tab settings.
to filter on constituents that live on a particular street or in particular city or state	X		
the results to display constituents that have given during a certain time period	x	X	Both Query and Report can produce these results. However, with Query you will need to manually select the gift date from the list of criteria as opposed to with Reports where you just fill in the date parameters on the General Tab
the results to display constituents that have given during a certain time period filtering on constituent codes, attributes, funds, campaigns, funds, appeals, gift types, etc.		X	

Query is a powerful tool in The Raiser's Edge that allows you to filter and group records. Query basically uses all the fields on all the different types of records to gather its information. Standard **Reports** in The Raiser's Edge are comprised of a series of parameter tabs. You must complete each tab, selecting the specific information you want to include in your report. Reporting tasks are grouped in report categories.

Query vs. Report in The Raiser's Edge

When you want....	Query	Reports	Notes
the results to display constituents that have given during a certain time period filtering on constituents with certain solicit codes (applicable if your organization uses the solicit codes on the bio1 tab)	X	X	Create a Query to exclude those solicit codes. Then create a Report using the Query created.
the results to display constituents that have given during a certain time period easily filtering on soft credits or matching gifts		X	
the results to display LYBUNTS (those constituents giving "Last year but unfortunately not this year")		X	Use the LYBUNTS report under Analytical Reports
the results to display SYBUNTS (those constituents giving "Some years but unfortunately not this year")		X	Use the SYBUNTS report under Analytical Reports
the results to display Non-Givers ever to your organization or during a particular time period		X	Use the Non-Contributors report under Analytical Reports
the results to display New Donors to your organization during a particular time period		X	Use the New Donors report under Analytical Reports
the results to display donors in your organization's donor categories/donor levels during a particular time period		X	Use the Donor Category report under Analytical Reports. You will first need to set up your organization's donor categories/levels in Configuration>Tables.
the results to display your organization's top donors during a particular time period		X	Use the Top Donor report under Analytical Reports.
the results to display donors giving cash or stock gifts during a particular time period		X	Use the Cash Receipts Journal under Financial Reports.
the results to display an analysis of the number of gifts given to a campaign, fund or appeal during a specific time period comparing the campaign, fund or appeal goals		X	Use the Campaign Performance Analysis Report, Fund Performance Analysis Report, or Appeal Performance Analysis Report
the results to be displayed in a professional format		X	

Let us help you with your Raiser's Edge System!

Through our experience at hundreds of organizations, we've developed a clear, sound process for optimizing our clients' use of the Raiser's Edge software.

Our services include system assessments, data conversions, data cleanup (including codes / tables and duplicates), process design and documentation, query and report setup, training, and policies and procedures documentation. These services provide our clients a solid foundation for effective use of this powerful fundraising tool. Contact us today to find out how we can help you!

For more information:

Tammy Gilbert Cardona, Business Development Manager

tammy@npsspecialists.com | 615.301.1726 | www.npsspecialists.com

Query is a powerful tool in The Raiser's Edge that allows you to filter and group records. Query basically uses all the fields on all the different types of records to gather its information. Standard **Reports** in The Raiser's Edge are comprised of a series of parameter tabs. You must complete each tab, selecting the specific information you want to include in your report. Reporting tasks are grouped in report categories.